



Diving Industry Marketing, Consulting and Research

The Cline Report

Young Dive Professionals Psychological Insights

Collected October 10th to November 14th, 2018

Created for the Diving Educational & Marketing Association (DEMA)



Tables of Contents

Young Professionals Dema Focus Group Interpretive Notes -----	3
Appendix A: Focus Group Translated Notes -----	9
Appendix B: Pre-Survey Questionnaire-----	17
Appendix C: Focus Group Survey Questionnaire -----	18



YOUNG PROFESSIONALS DEMA FOCUS GROUP INTERPRETIVE NOTES

Conducted November 16, 2018, Las Vegas Convention Center

Moderators: William Cline & Tom Ingram

Monitor: Myra Kurn, Ocean Enterprises, DEMA Board of Directors

Overview:

This is an interpretive document of two studies, a pre-survey and then a one-hour focus group conducted as outlined. The nature of this document is subjective in nature and based on opinions, interpretations and dialogue communicated prior to and within the aforementioned pre-survey and focus group. Prior to the focus group, 40 candidates responded to a basic survey asking for opinions on barriers to younger divers entering the sport and then becoming professionals. Of the 40 responses, 24 were within the target 'under 30' age bracket. The focus group was utilized to further explore the questions asked within the exploratory pre-survey. A total of nine candidates participated in the focus group and were geographically spread out across the USA. Seven of the nine participants were within the target age of 30 years old or less. The other two were dive shop co-owners or managers. This document is an interpretive process as a result of both the pre-survey and at DEMA show focus group. The author and primary moderator, William Cline, has 30-years of specific consumer and industry market research and is the most experienced and published research authority in the recreational scuba industry. With that perspective, this qualitative research document is presented.

Pre-Survey Conclusions

- 1) A full 90% of all the responses centered on the cost of participation (certification, equipment, travel) being a barrier to entry for younger divers. Equally, over 50% responded that lack of salary / pay was the reason why the younger generation does not transition into professional roles.
- 2) Secondary issues were the perception of lack of local diving and commitment needed to become a diver in terms of time, cost, psychological commitments.
- 3) The average age of the target respondents was 24.4 years old, and they had been certified an average of 6.8 years, made 397.6 dives in their lifetime, and made 66 dives within the last 12 months. All worked in



some capacity within the scuba industry, mostly retail, and all but two held divemaster, instructor or above certifications. From this pool the majority of the focus group candidates were composed.

Focus Group Conclusions and Recommendations

All the questions were divided into three general sections as listed. However, many areas bleed into others so all these interpretations should be viewed collectively for the three sections:

1. The DEMA Show

- a. Networking, connections, updating, innovation, social, opportunities, knowledge, interaction; all terms used to describe the show experience. These terms should become the building blocks of the show in terms of communication, structure and execution in future years. A large part of the motivation to come to the show is seeing new products and innovations in diving. Getting 'free stuff' was specifically mentioned which could translate to the many giveaways at the show. This should perhaps be marketed in future shows as a benefit. Others felt excited about learning what's new in the industry and being at the show. To foster this culture, the show should consider new ways to generate this excitement for new or younger professionals.
- b. The participants felt the show is an opportunity to bridge the generational gap – specifically in terms of social interactions. Two different types of 'meet & greet' or social mixers were recommended:
 - i. Young Professionals – which can be defined by age or time in the industry. However, the group revealed that some young professionals have been in the industry most of their lives, i.e. being raised in a dive shop. Based on observations, age restriction should be the only identifier, perhaps 30 or 35 or younger. This social event needs to appeal to their desire to 'nerd out' on diving as one participant said about the show while possibly offering learning opportunities as well. There was a desire to 'connect' with others their age/generation at the show.
 - ii. Generational Gap Restorative Opportunities – This social mixer type of event allows both generations to interact in a non-threatening environment. This interaction needs to be in an atmosphere and time that allows for casual social interactions. Perhaps look at a 'pairing' structure to this



event where every young person is paired with an older professional, like speed dating, that changes with pre-defined intervals. The objective of this social interaction should be to mix the two generations purposefully and in a non-threatening manner to the younger generation.

- c. **Data Distribution & Education:** The younger candidates want more advanced seminars. The currently portfolio of education offered at DEMA is not designed for their generation. For instance, they want advance analytics programs, rather than the basics. They want to move from 101 to 202 in terms of course and content delivery. Data presentation is also key and should be incorporated into multiple channels of distribution at the show. They are 'data hungry' and want research and purchasing data. Since DEMA possesses much of that information, it should to be presented to this generation in methods that appeal to their learning styles.
- d. **Bridging innovation with experience** should be a major priority of the show in future years. The younger generation represent 'innovation' and the older 'experience.' The young professionals feel they are fighting a "just because it's something new does not mean it will not work" mentality. Therefore, the show should offer opportunities for innovations and new ways to do business integrated with experience
- e. DEMA should consider an innovation award to be presented to an individual or company that creates or demonstrates unique innovation within the sport. This could foster the 'innovation' or new idea factory within the various stakeholder groups and may help to bridge these some of these generational gaps.
- f. ScubaRadio was specifically mentioned by one of the candidates saying they listen to the show. This indicates ScubaRadio's relationship with DEMA appeals to the younger generation and should be expanded. If possible, add education-related segments with key personalities in the industry. The host(s) of this show might be an excellent candidate to host the social mixers outlined previously.

2. The DEMA Organization

- a. The association suffers from lack of awareness that there is a 'DEMA' behind the DEMA show. The predominate perception was DEMA is a show, not an organization. As a result, perhaps the association should consider renaming the show to something like "Dive Industry Trade Expo presented by DEMA" or other non-



association identifier creating a clear distinction from the association and show.

- b. With not realizing there was an association behind the show, some candidates had not visited the DEMA website in a significant amount of time as they felt there was no reason. Considering the significant resources available for DEMA members, including a massive amount of consumer and retailer research, it's really a matter of perception and communication as to why more younger professionals do not know about the association and its benefits.
- c. Communication was a key point and they were split as to how they wished to be communicated with as young professionals. Some said they preferred "old school" techniques like phone calls while others said they prefer new means and would listen/watch podcasts or webcasts with DEMA news or updates. There was very little interest in using social media as a whole to communicate from the association to their generation. A central complaint was that too many emails were being sent by the association, however, if emails are sent, then they need to be concise with headlines to peak their interest. Considering this is actually the format for the DMAIL mailers – this comes down to a perception issue in regards to the email communications. Webcasts was mentioned in this context of communications as well.
- d. The Association should become a unifying force within the industry as mentioned specifically by one of the participants. They felt that the association could become the bridge between generations and culture. Mentorship or internships was mentioned multiple times by participants as a means to bridge the gap of innovation and experience. The perception among the younger professionals is they are resented for bringing new ideas or techniques to the way things are done, especially among those that worked in dive retail shops.
- e. They also did not like the "millennial" label as there seems to be some resentment at the use of this label for their generation. A couple of the participants even asked what does that actually mean?
- f. The association should consider becoming the 'Angie's list' of the scuba industry. Using the yearly DEMA show data, the association could become a central point for listing all companies globally, even non-members as this could become a resource for new professionals in reaching other companies. Perhaps even offer individual profiles for instructors and divemasters – again



connecting these people with the world of diving through the association.

3. The Industry in General

- a. In spite of feeling like outsiders, the participants' outlook was overwhelmingly positive for the future growth of the sport. They did feel that the generational gap should be bridged soon or it might affect the future growth of the sport.
- b. There was keen concern over their perception of adequate certification training. In fact, nearly all participants advocated longer initial diver training and spoke negatively about 'tropical' certifications being ineffective in creating safe competent divers. However, they feel there will be an explosion in the resort or try-diving programs as people their age want to 'try' diving, adding further credibility to DEMA's Go Dive Now pool program.
- c. Media was blamed for creating negative perceptions about diving. They feel TV shows like Shark Week have negatively affected diving growth. The group believes we no longer have dive heroes, leaders or visionaries that are painted in a positive light promoting diving. Perhaps a committee should be established with the purpose of helping to foster positive media for diving by connecting content with producers or even utilizing today's diving heroes in DEMA-sponsored content. This content could be released via free distribution channels such as YouTube or Facebook Watch.
- d. There was some discussion about the health benefits for scuba. This should be promoted to the younger generations as they felt it was a positive selling feature for diving but not used in promotions.
- e. Equipment cost was cited as a barrier to younger divers entering the sport. They suggested that dive shops should create rent-to-own or perhaps offer lifetime rental programs to ease the initial cost of acquisition.
- f. Environmental issues – surprisingly, the environmental question asked did not evoke a very strong reaction among the participants. They did state they liked hearing about the association's environment efforts in the context of the industry's responsibility and they all felt it is our collective obligation to tackle environment issues, starting with proper buoyancy control to avoid aquatic damage. One participant did say that diving was a tool to help build passion for the environment, but that was in the context of teaching student divers.



- g. When asked about how they sell scuba to their friends, all of them used the terms 'pictures' or 'videos' on their 'phones' indicating mobile apps and websites are useful tools to attract their friends to diving. The word 'alien' was used twice in context to diving. One person even stated more people have walked on the moon than been to the bottom of the ocean lending to 'another world' approach.
- h. Passion was mentioned 13 times in the focus group by the participants. Eleven or 85% of all the mentions were talking about the industry in general. Passion is a key identifier as to why they stayed in the sport in spite of the perception of low pay and high cost to entry. The phrase 'first breath and I was hooked' was used showing the power of people trying scuba. The psychological divider is 'did that breath evoke passion or not'? Or 'what scale is that passion registering within the psyche for a new diver'? Passion is the driving force for young professional to stay in the sport despite the barriers. Creating that passion in new divers or people learning to dive is critical to identifying divers that will eventually pursue a career in diving.

This summation is submitted to the DEMA Association December 9, 2018 with objective analysis and as unbiased approach as possible with this type of qualitative research.

A handwritten signature in black ink, appearing to read "William Cline".

William Cline
President



APPENDIX A: FOCUS GROUP TRANSLATED NOTES

DEMA Focus Group Nov 16, 2018

DEMA Show 2018

At Show Private Room

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Materials

No handouts or pre-preparation was offered, other than a candidate survey of which 60% of the participants completed prior to attending.

Key Takeaways

EXCLUSIONS

Many felt the industry, as a whole, excludes them as a younger generation and they very much feel like outsiders.

COMMUNICATION

Many felt DEMA as an organization does not communicate to them in a style or format that is received by their generation.

MENTORSHIP

Overwhelming, all believed a mentorship program would be helpful in gaining knowledge and experience within the industry.

WE ARE DATA HUNGRY

They need data to know who is their buyer and help to understand the buying decision.

PASSION SELLS

You either have passion or you don't. Passion is best communicated face to face.



Overview

Industry companies were asked to send a brief survey to their employees. The ideal candidates were to be under 30 years of age, and having been a professional in the industry for less than five years. 80% of the participants met this criteria, as one was slightly older (a dive shop co-owner) and the other within the age but been in the industry since a small child.

Goals

Three primary areas of focus were planned, with a series of 18 questions asked in roughly the format as this planned agenda:

1. The DEMA Show
2. The DEMA Organization
3. The Dive Industry in General

A variety of probing questions was planned surrounding these three primary topics.

Structure

The focus group session lasted one hour and was led by William Cline, Cline Group, with Tom Ingram, President DEMA as co-moderator. DEMA Board member Myra Kurn was present as well. Each candidate was asked questions, some were free-form that anyone could answer, others were directed to individuals or required responses from each participant. All format, structure, and techniques were within normal acceptable procedures for this type of qualitative research focus group. The entire session was video taped for documentation purposes.

Participants

The following participants were present, in no particular order and not including the moderators or DEMA board member (from the right of moderator Cline):

- Debbie, Hillsboro OR, Dive Shop Co-Owner, only been diving for 7 years (above 30 YO). Second DEMA show.
 - Key Quote: learning to dive was "Panic Control" for me
- Laura, Upstate NY, works for Aquatic Center, two years in the business as instructor. Third DEMA show
- Alex, two years diving, started in college, fell in love with scuba



- Key Quote “fell in love with scuba and am trying to get people as passionate as me about the sport”
- Allie, Muncie, IN, was in water aerobics at college, and next semester was introduced to diving. Came to DEMA last year for first time and had no idea there was a whole industry behind diving.
 - Key Quote: “it’s what I have been looking for my whole life”
- Christy, St. Louis, five years in diving, husband to Mike, first DEMA show, have four children under 8 yo – not been able to do as many dive trips with kids.
- Mike, St. Louis, Video professional, five years in industry, trying to get plugged into the industry
 - Key Quotes: “I wanted to scuba dive from a very early age because of my Marine dad, but parents said no place to dive locally”
 - “The first breath I was hooked”
- Katrina, grown up in the industry, daughter of two course directors, been diving since child, was parents business and wanted nothing to do with this industry. Then became a divemaster and got hooked and understood the love they had for the business/industry.
- Tony, South Louisiana, (30 yo plus) been diving for 20 years, joined the army, came home and wanted a next challenge, married. Started in Public Safety Diving, local dive/ fire team leader. Second DEMA show.
 - Key Quote: “what’s that next step in the industry, never ending search for knowledge”
- Rob, Course Director, VA dive shop, dad was a Sub officer, got certified to spend time with father when on leave. Was in Peace Corps, Marine Biologist, came to DEMA show and saw passion, four years ago.
- Key Quote: “Thought diving was the coolest thing ever done in life with my first cert dive”

Summarized Questions

Questions will be presented and collective responses given.

DEMA Show Specific:

1. Why do you come to DEMA?
 - a. Free stuff.
 - b. Seeing new toys.
 - c. Network and meet people to make connections.
 - d. Social event for diving.



2. How do you sell DEMA (show) to your friends or associates you work with?
 - a. Scuba nerds get together and nerd out – same as any convention but just diving.
 - b. Shop we used to work with did not come to the show, we come because we get out what we put into the show.
 - c. New vendors, new connections, new destinations.
 - d. DEMA is a marketplace for new ideas, and bring back new ways to be better tomorrow than today.
 - e. Our staff is excited to come to the show.
3. If you were in charge of the DEMA show, what would you do to bring in a new generation?
 - a. Seminars more directed towards us, super simple seminars but we know the basics, we need the next level of seminars and education.
 - b. Updating some of the seminars to be more advance, psychology of the market, beyond what is offered now.
 - c. We are data hungry – so much need for our consumer and how they make decisions.
 - d. Building the bridge between the generations, we have a young contingent and old and need better bridges rather than walls.
 - e. The industry has a lot of knowledge with existing generation and lots of innovation with new generation and need a bridge to grow.
 - f. Wavemaker nomination has opened up huge opportunities in industry and allowed us to mix with diving legends (two candidates nominated were in the group).
 - g. Create structured environments for old and new generations to interact.
 - h. Have a Meet and Greet with younger generations.
 - i. We all feel like we are outsiders, taken me five years to get to the stage where I am taken seriously.
 - j. We suffer from credibility as a younger generation.
 - k. How do we get the younger generation to hang around dive shops to become the older generation.



DEMA Association Specific:

4. Do you think there is a distinction between the DEMA show and DEMA association?
 - a. DEMA is just the show and no one knows there is an organization.
 - b. I did not even know there was an organization until six months ago.
 - c. I have not been to the DEMA website for six months – no reason to go.
5. What could the organization do to help with the distinction?
 - a. Maybe use webcasts to communicate with younger generations as education tools.
6. What about a Facebook Closed group or other format for DEMA Assoc to communicate?
 - a. Two of my thousands of Facebook members are DEMA members – so no.
 - b. Our age gap is really struggling as many older generations do not have FB.
7. How to we (DEMA) as an organization talk to you?
 - a. Phone calls work best.
 - b. Too many email blasts and no one reads them.
 - c. We ignore social posts.
 - d. Standing out with Social media is really hard, DEMA needs to go “old School” to reach us.
 - e. Podcast could work if DEMA did one with an interesting topic.
 - f. We are younger generation and we identify with pre-internet but also identify with ‘want it right now.’
 - g. ScubaRadio guy is here at the show and is interesting, I would listen to his interviews.
 - h. DEMA news on audio, I could put my earphones in and listen while I am doing something else.
 - i. Need concise emails with headlines that peek my interest.
8. What one think do you need from DEMA the organization, not the show, what would that be?
 - a. We want a mentorship program.
 - b. Older generation does not want to bridge this divide, they do not want to listen to the 25 year olds telling them what to do.



- c. Structured program with older generation willing to share, and young generation willing to soak it up.
 - d. Have to be able to match people with mentors.
 - e. Took five years to feel like I am finally making connections at the show.
 - f. I want to open my own shop someday, so looking for help and info for how to run a scuba business.
 - g. Discouragement from the older generation is so hard, when we are so hungry for information about the business.
 - h. We just get shot down by the older generation, "get out while you can" feels like how they feel about the business.
 - i. Internships would be helpful, but so hard to find people that want to help.
 - j. DEMA needs to be the united front that helps connect younger to older – a unifying force in the industry.
 - k. Define millennials, "we don't even know what we are" such a huge gap.
 - l. We are tired of being told we are "millennials."
9. Who received the emails from DEMA?
- a. We don't get it directly, it's forwarded from my boss, so no we don't get it direct.

Dive Industry Specific:

10. How many plan to stay full time in the industry?
- a. 90% plan to stay.
11. Where do you see the industry in the next five years? Up, down, same?
- a. All responded Up – absolutely up as millennials want to buy experiences not things.
 - b. Barrier to entry will get lower in the future.
 - c. If we are not careful we will struggle as an industry in the next five years with the generational gap.
 - d. The industry is not getting any younger, we are losing industry people.
 - e. We are going to grow in education, and blooming in discover scuba or try diving programs.
12. What can we do to make diving more 'sticky' or attractive to your friends?
- a. That's a big problem but it's all about the media.



- b. Mainstream media is all negative, shark attacks, etc.
 - c. We have no positive influence for diving like sea hunt or JMC.
 - d. We need a mainstream media program that paints diving in a positive light.
 - e. We need adventurous media.
 - f. Sport is expensive, dangerous and time consuming – but does not have to be perceived as that.
 - g. Diving is proven to lower anxiety, technical skills, it's more than breathing underwater.
 - h. Need to lower the barrier to entry – maybe an unlimited rental program at dive shops or rent to own gear program. Can start small and then build that passion.
 - i. Who is the current visionaries and leaders in the industry?
13. How do you feel the current certification process works with you and your friends?
- a. I wish I had more time to spend with students in training.
 - b. Barrier to entry it low – passion needs to be relayed from dive shop to customers.
 - c. First dive is so important, pool time is critical. If first dive is not good they will not come back.
 - d. We run an 8 week session, and our divers are lifestyle divers (university program).
 - e. I struggle with where the industry is heading from a training standpoint.
 - f. Lack of training – turn and burn is not healthy.
 - g. We take the time to make a good diver but not just a C card.
 - h. The Caribbean certification model is killing the industry – we have to take divers from Carib programs into the pool before taking adv course.
14. Do we as an industry have a responsibly environmentally, and do we do a good job of communicating that to the public?
- a. Yes 100% we have a responsibility – but in the Midwest we do not connect the dots and communicate that to our students.
 - b. Buoyancy control is important.
 - c. Environment makes people passionate and that drives what you do.
 - d. Diving is the tool that gets people into that passion.
 - e. If you connect Buoyancy to conservation is helps in communicating skills.



15. Do we have a responsibility to help environmental issues?
 - a. Can we try to be better tomorrow than today.
 - b. We like to hear about the DEMA legislation as that is important to us.
16. What is the one selling feature to get your friends into diving?
 - a. Pictures on phones.
 - b. More people have walked on the moon than been to the bottom of the ocean.
 - c. Nothing on this planet like scuba diving.
 - d. Show photos and videos on phone.
 - e. Pull out my phone and show pictures that its not deep.
17. What do you say to some that wants to get into the diving industry/business?
 - a. How passionate are you? You have to work at is 24/7 – I am working all the time.
 - b. I am so passionate I am willing to move if needed.
 - c. You either have passion or you don't.
18. Why did you want to get into the dive industry?
 - a. I was passionate about diving and wanted to communicate that passion – and it's best communicated face to face.
19. Why did you get into diving?
 - a. Taught Middle school physics and nobody wanted to be there.
 - b. Couple started a dive shop.
 - c. School and passion was seeing this alien world.
 - d. I love water.
 - e. Always wanted to be a mermaid.
 - f. Saw a video – husband passion made me want to try it.
 - g. First breath – media is my tool to communicate my passion.
 - h. I was happier underwater than on top.



APPENDIX B: PRE-SURVEY QUESTIONNAIRE

1. Name:
2. Age:
3. City, State, Country (if not USA) of Residence:
4. Martial & Family Status:
5. Place of Employment & Part or Full Time:
6. Length of Time at current job & Length of time working in the dive industry: Â
7. Number of years you have been a certified diver:
8. Approx number of dives in your lifetime
9. Approx number of dives in the last 12 months:
10. Highest Dive Certification:
11. What is your diving-related role or job at the place you currently work:
12. In your opinion, what is the number one challenge facing the diving industry in terms of attracting divers under the age of 30 into the sport?
13. What is the number one challenge facing the diving industry in terms of attracting a diving professional under the age of 30 to work full time as a professional:



APPENDIX C: FOCUS GROUP SURVEY QUESTIONNAIRE

Focus Group

Professionals in the Industry for five or fewer years

Time frame: 1 hour

Why a focus group?

DEMA is interested in bringing more young professionals into the association and industry early in their careers and keep them in both longer. To help achieve that goal, DEMA is interested in feedback about the association, show and industry.

Questions are based on a survey completed in 2016 on the importance of personal benefits DEMA offers to individuals in the industry for five or fewer years. Although the below questions are listed to help guide the discussion, the conversation can go anywhere, and the participants should be allowed to take the discussion in a direction they want to go.

Guidelines

- No right or wrong answers, only different viewpoints
- We are recording the conversation to help us understand better. Please talk one at a time
- We are on a first name basis
- You don't need to agree with others. But you must listen respectfully as others share their views
- Phones should be silenced
- It is good to talk to each other.

This is a group of new professionals (five years or less in the industry). We are interested in learning from you about what works, what doesn't and what else we can do to improve your experience in the industry and the association.



Questions

Let's talk about the Diving Industry first

1. How are you professionally involved in the recreational diving industry? (e.g.: instructor, store owner, etc)
2. How did you become involved in the diving industry?
3. Are you involved in the diving industry as a full-time job? Or part-time?
4. If you are interested in recreational diving as a career, think about the obstacles you have encountered in making that happen. What one obstacle prevents (or makes you hesitate) in making diving a career?
5. WC: What do you see is the future of diving? Growth, decline, stagnant?
6. WC: What do you think the industry does right and/or wrong to attract younger divers?
7. WC: What do your non-diver friends think about diving? Positive, interesting, boring, etc?
8. WC: How do environmental issues affect the scuba industry in your opinion in terms of attracting people to diving?
9. WC: Do you think certification training is adequate, too little or too much in terms of time requirements and learning?

Let's talk about DEMA SHOW for a moment

10. WC: Why do you come to the show?
11. How many DEMA shows have you attended? Do you attend DEMA Sponsored seminars? Do you attend seminars sponsored by exhibitors?
12. WC: How can we attract more younger professionals – those new to the industry yet working in the business?
13. If you were going to invite a professional colleague to attend DEMA Show, what would you say in the invitation?
14. Suppose you were in charge of DEMA Show and could make one change that could make the show better. What would you do?



Let's talk now about the DEMA Organization

15. How are you involved with DEMA?
16. Tell me about some positive experiences you have had with the DEMA organization.
17. Tell me about disappointments you have had with the DEMA organization.
18. DEMA is involved with research, advocacy, promoting networking opportunities, education, the trade show, marketing programs and more. Among all the benefits that DEMA Offers, which are the most important for you professionally? Personally?

Some of these questions will undoubtedly lead to more in-depth discussions. With only an hour to discuss, these should cover the limited time available, and provide feedback from new professionals.