Diving Industry Consumer Study

OPEN LETTER FROM THE PRESIDENT AND RESEARCH DIRECTOR

January, 1997 To Whom it May Concern:

This study was commissioned to examine the diving industry, and lay down a base-line of collective information for future growth measuring purposes. All surveys were collected via mail survey, using research-industry standard techniques for collection, tabulation and analysis. All data within this report has been carefully examined, and to the best of our professional knowledge, is valid and correct as shown. Cordially, *William Cline, President*
Dr. Stewart Shapiro, President Market Research Director

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I. Report Introduction

The Cline Group independently commissioned a nationwide study of the diving industry in October and November 1996. The study surveyed two different groups of diving consumers, representing the largest, most diverse group of diving consumers ever surveyed. The two sources for lists were as follows:

Group 1: Active divers having recently participate din dive travel activities to a Caribbean location within the past 12 months.

Group 2: Any diver certified over the last seven years, randomly drawn from PADI's database of all certified divers. This study represent the most comprehensive study on consumer attitudes and opinions ever conducted for today's diving consumers. Each list was sampled using the computer-generated random number selection methodology, ensuring a random and unbiased sample. All consumers were surveyed for this study, with the following objectives:

1. Study the relationship between diving consumers retailers and diving manufacturers.
2. Create a popularity index and ranking for various equipment manufacturers.
3. Establish consumer perceptions for both hard and soft goods across a wide-variety of brands.
4. Determine what features a consumer looks for when selecting a brand or manufacturer.
5. Create a base-line of consumer information and indexes for brand recognition. As this study involves sampling and surveying the largest cross-section of diving consumers to date, the data collected from that study is, in this organization's opinion, the most valid diving consumer data ever collected, regarding dive equipment manufacturing and brand recognition. What makes this study unique to the diving industry is that this data is not only based upon surveying active divers, but also based upon PADI's massive diver database as well, making this the most diverse consumer sampling ever conducted in the history of the diving industry.

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II. Executive Summary

This section contains a brief overview of selected findings from this study. Summary is as follows:

Question	Certified Group	Active Group	Overall or Combined
DEMOGRAPHICS			
Q3.8 Region of Residency	48% Midwestern Region	45% Eastern Region	44% Eastern Region
Q3.1 Gender	76% Male, 24% Female	84% Male, 16% Female	79% Male, 21% Female
Q3.2 Age	Average: 37 Yrs.	Average: 42 Yrs.	Average: 39 Yrs.
Q2.6 Profession	23% Professional	27% Technical	20% Professional
Q3.7 Household Income	Mean: $69,151	Mean: $96,585	Mean: $82,868
DIVING ACTIVITIES	**Certified Group**	**Active Group**	**Overall or Combined**
Q1.1 Certification Level	67% Open Water	35% Open Water	54% Open Water
Q1.2 Certification Agency	N/A (Sample From PADI List)	65% PADI	N/A
Q1.3 Years Actively Diving	Mean: 7 Yrs.	Mean: 10 Yrs.	Mean: 8 Yrs.
Q1.4 Total Dives Made to Date	Mean: 155 Dives	Mean: 403 Dives	Mean: 279 Dives
Q1.5 Dive in Last 12 Months	Mean: 15 Dives	Mean: 35 Dives	Mean: 25 Dives
Q1.6 Dive Trips Last Year	Mean: .8 Trips	Mean: 1.3 Trips	Mean: 1 Trips
Q1.7 Total Dive Trip Expenditures	Mean: $1,902	Mean: $2,947	Mean: $2,424
Dive Equipment Purchasing	**Certified Group**	**Active Group**	**Overall or Combined**
Q2.1 Total Spent on Equipment	Mean: $1,992	Mean: $3,377	Mean: $2,685
Q2.2 Last Piece of Dive Equipment	BCD: 19%	BCD/Dive Computer: 20%	BCD: 19%
Q2.3 Date of Last Equipment Purchase	Mean: 4.3 Years	Mean: 1.3 Years	Mean: 2.8 Years

Q2.4 Manufacturer or Brand	16% U.S. Divers 13% Seaquest	19% U.S. Divers 17% Sherwood	17% U.S. Divers 13% Sherwood
Q2.5 Purchasing Influence	60% Dive Store Personnel	41% Dive Store Personnel	43% Dive Store Personnel
Q2.6 Most Influential Publication for Equipment Purchasing	38% Skin Diver	43% Rodale's Scuba Diving	33% Skin Diver 31% Scuba Diving
Q2.7 Manufacturer Marketshare	63% Dacor 58% U.S. Divers	71% U.S. Divers 69% Dacor	107% Dacor 104% U.S. Divers
Q2.8 Ever Purchased Through the Mail	26% Yes 74% No	55% Yes 45% No	38% Yes 62% No
Q2.9 Why Purchased Though Mail	67% Price 29% Convenience	85% Price 52% Convenience	98% Price 53% Convenience
Q2.10 Highest Rated Attributes for Equipment	Dependability: 8.8 Product Quality: 8.7	Product Quality: 8.9 Dependability: 8.7	Product Quality: 8.8 Dependability: 8.7
Q1.a Years Certified	Mean: 7.1 Years	N/A	N/A
Q1.b Time Since Last Dive	Mean: 1.5 Years	N/A	N/A
Q1.c Classify Current Status	33% Inactive	N/A	N/A
Q1.d If Inactive, Plan to Become Active?	96% Yes, Plan to Be More Active	N/A	N/A
Q1.e # of Dives Planned for Next 12 Months	Mean: 14 Dives	N/A	N/A
Q1.f Time Since Last Dive Vacation	Mean: 1.7 Years	N/A	N/A
Q1.g Where Went on Dive Vacation?	17% Bahamas 15% Cozumel	N/A	N/A
Q1.h Which Publication Influenced Dive Travel Decision	39% Skin Diver, Spent $1,822 on Travel	N/A	N/A

Diving Matrix: Manufacturer Companies Rated By 11 Attributes:

Q1 Manufacturer Quality Manufacturer	Top Scores
Nikonos	8.1
Henderson	7.9
Zeagle	7.9

Q2 Manufacturer Reputation Manufacturer	Top Scores
Nikonos	8.4
Henderson	8.1
Mares	7.8

Q3 Manufacturer Price Manufacturer	Top Scores
Oceanic	7.3
Seaquest	7.3
TUSA	7.1

Q4 Technical Superiority Manufacturer	Top Scores
Nikonos	7.6
Oceanic	7.5
Scubapro	7.5

Q5 Manufacturer Warranty Manufacturer	Top Scores
Scubapro	7.6
Oceanic	7.5
DESIRED SCORE	7.3
Seaquest	7.3
Nikonos	7.3
Cochran	7.3

Q6 Product Value Manufacturer	Top Scores
Oceanic	7.7
ORCA	7.3
Seaquest	7.2
Zeagle	7.2

Q7 Product Dependability Manufacturer	Top Scores
Scubapro	7.9
Oceanic	7.9
Nikonos	7.9

Q8 Product Fashion Manufacturer	Top Scores
Oceanic	7.6
Seaquest	7.5
Scubapro	7.2
Mares	7.2

Q9 Customer Service Manufacturer	Top Scores
Oceanic	7.6
Seaquest	7.5
Scubapro	7.4

Q10 Product Features Manufacturer	Top Scores
Oceanic	7.9
Scubapro	7.6
Nikonos	7.4

Q11 Product Availability Manufacturer	Top Scores
Seaquest	7.8
Oceanic	7.8
USD	7.7
TUSA	7.7

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III. Statical Tolerances of Survey Data

In interpreting survey results it should be kept in mind that all surveys are subject to sampling error, that is, the extent to which the results may differ from those that would be obtained if the entire dive consumer population in the U.S. had been interviewed. The size of such sampling errors depends largely on the number of interviews. The following table may be used to determine the allowances that should be made for the sampling error of a percentage. The computed tolerances have taken into account the effect of the sample design upon sampling error. They may be interpreted as indicating the range (plus or minus the figure shown) within which the results of repeated samplings in the same period could be expected to vary, 90% of the time, assuming the same sampling procedure, the same survey execution, and the same questionnaire were used.

Recommended Allowances for Sampling Error of a Percentage In Percentage Points (at 90 in 100 confidence level for a sample size of 100)1 Percentages near 10 4.4% Percentages near 20 5.9% Percentages near 30 6.7% Percentages near 40 7.2% Percentages near 50 7.4% Percentages near 60 7.2% Percentages near 70 6.7% Percentages near 80 5.9% Percentages near 90 4.4% Overall Average for All Samples 6.2% Note: Average Sample Error Rates for Individual Groups Reported: Overall Average for ‘Certified’ Sample 8.1% Overall Average for ‘Active’ Sample 9.8% 1 The chances are 90 in 100 that the sampling error is not larger than the figures shown. The table should be used as follows for the total sample: If a reported percentage is 22, look at the row labeled "percentages near 20". The number at this point is 5.9, which means that the 22 percent obtained in the sample is subject to a sampling error of plus or minus 5.9 points. Another way of saying it is that very probably (90 times out of 100) the average of repeated samplings would be somewhere between 16.1 and 27.9, with the most likely figure of 22 obtained. All sampling error rates listed in this study are well within acceptable tolerances for a survey of this nature.

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IV. Methodology

Questionnaire Development The consumer questionnaires were developed by William Cline and Cline Group's research director, Dr. Stewart Shapiro. Prior industry experience in conducting market studies, as well as specific diving industry expertise was applied to the creation of this survey to ensure accurate data were collected in the most efficient manner possible. This study utilized a mail-survey collection technique, offering a $1.00 cash incentive for completing and returning the surveys. A copy of both surveys are included in the Appendix of this report.

Questionnaire Administration To accomplish the outlined goals, two groups were surveyed as follows:
Group 1: Termed the "Certified" Group and consisted of a random sampling PADI's database of all certified divers that are on file dating back 7 years. A total sample size of 1,000 consumers were selected, of which 300 were mailed a survey for this study.
Group 2: Termed the "Active" Group and consisted of a random sampling divers that had been on a dive vacation to a Caribbean dive resort within the last two years. A total sample size of 5,000 consumers were selected, of which 300 were mailed a survey for this study. Only consumers residing within the Continental U.S., Alaska and Hawaii were surveyed for this study. As a result, the responses are anticipated to indicate how all dive consumers would respond if asked the following survey questions. Mail survey were sent to these two groups with a $1.00 cash incentive for return. The mailings were conducted over a 60 day period, from October and November 1996. The final tabulation was completed in January 1997. A total of 126 surveys were completed and returned for tabulation. Each group breaks down as follows:

Group 1: Termed the "Certified" Group total surveys returned = 75

Group 1: Termed the "Active" Group total surveys returned = 51 Due to these small sample sizes, individual group data should be viewed as exploratory data, with the "overall" or combined fields providing the lowest error rates.

Data Analysis and Report Generation As outlined in the report introduction, this study incorporates data collected from two different consumer groups surveys in this survey Where possible, each of the two groups is reported in a table manner, allowing a comparison of the two groups. However, as indicated, caution should be exercised when interpreting data reported on either of the groups, as the sample size was relative small. More accurate data is reported in the 'combined' data sections. Because this is the first time these two groups have ever been surveyed, this data represents very unique data, as this report represents the most varied cross-section of diving consumers ever surveyed. Industry-standard SPSS Data Tabulation and Analysis Software was utilized in the data collection, entry and tabulation process for this report.

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V. Sampling Issues Geographical Groupings for this Study

Selection criteria for the sample was drawn from two different cross-section lists as previously identified. The lists are cross-tabulated for comparison, and labeled as follows:
Certified = Subjects certified within the last seven years, as reported by a random sampling from PADI's diver certification database.

Active = Active Diver Travelers, Having Taken a dive vacation at least once in the last 12 months.
Overall = Both Lists combined, representing the most accurate response to each question, based upon a larger sample.A random computer-generated "N'th" sampling technique was used to select all subjects for survey.

Geographical Groupings for this Study, these regions are grouped as follows:

West = Southwest, Northwest and AK/HI

Central = Midwest, Upper Great Lakes and Gulf States

East = Northeast and Southeast Each of these regions represent the following samples: The sample breakdown by geographic locations are as follows:

Q3.8 Region	Certified Count	Q3.8 Percent	Active Count	Q3.8 Percent	Overall Count	Valid Percent	USA Pop.	Dive Stores
Midwestern Region	36	48.0	19	37.3	55	43.7	39.4	29.3
Eastern Region	26	34.7	23	45.1	49	38.9	41.4	44.3
Western Region	13	17.3	9	17.6	22	17.5	19.2	26.4
Total	75	100.0	51	100.0	126	100	100.0	100.0

Conclusions As indicated, there is little differences between the overall sample, and the average USA population distribution, and dive store distribution in the U.S. This generally proves that divers follow similar distribution patterns as the population distribution of the U.S. Additionally, dive store distribution follows a similar pattern. The most significant differences are noted in the certified group, with Midwestern Regions peaking at almost 10% over the given population distribution for that region. The active groups more closely follows the population distribution of the U.S. Actual regions breakdown as follows:

Q3.8 State	Certified Count	Q3.8 Percent	Active Count	Q3.8 Percent	Overall Count	Valid Percent
TX	6	8.0	5	9.8	11	8.7
CA	6	8.0	4	7.8	10	7.9
FL	6	8.0	3	5.9	9	7.1
NY	6	8.0	3	5.9	9	7.1
IL	6	8.0	2	3.9	8	6.3
WI	4	5.3	4	7.8	8	6.3
OH	4	5.3	1	2.0	5	4.0
MI	3	4.0	2	3.9	5	4.0
NC	3	4.0	2	3.9	5	4.0
VA	3	4.0	2	3.9	5	4.0
PA			5	9.8	5	4.0
AR	3	4.0	1	2.0	4	3.2
WA	2	2.7	2	3.9	4	3.2
SC	3	4.0			3	2.4
HI	2	2.7	1	2.0	3	2.4
IN	2	2.7	1	2.0	3	2.4
IA	2	2.7	1	2.0	3	2.4
NJ	1	1.3	2	3.9	3	2.4
KS	2	2.7			2	1.6
MA	1	1.3	1	2.0	2	1.6
MO	1	1.3	1	2.0	2	1.6
OR	1	1.3	1	2.0	2	1.6
TN	1	1.3	1	2.0	2	1.6
UT	1	1.3	1	2.0	2	1.6
WV			2	3.9	2	1.6
OK	1	1.3			1	0.8
GA	1	1.3			1	0.8
LA	1	1.3			1	0.8
MN	1	1.3			1	0.8
NM	1	1.3			1	0.8
USVI	1	1.3			1	0.8
CO			1	2.0	1	0.8
CT			1	2.0	1	0.8
KT			1	2.0	1	0.8
Total	75	100.0	51	100	126	100

Conclusions According to the overall data, the top five states for all divers are as follows: Texas 9% California 8% Florida 7% New York 7% (actually #1 when combined with New Jersey = 10%) Illinois 6% Given the error rates for this study, there is little significant differences in these top five states.

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VI. Consumer Demographics tables and conclusions within this report:

1. The responses to each question are grouped according to similar classifications and are listed in numerical order of response. The total number of subjects responding to each question are also indicated.
2. All answers are listed in percentages or mean (average) figures for a given response. Some responses total more that 100% due to survey subjects responding with multiple answers. The actual number of responses are listed after each percentage breakdown and labeled 'Count'.
3. Most questions are broken-down into three classifications; A) Certified–representing the PADI database of all certified divers, regardless of diver activity level; B) Active–representing divers that have taken a tropical dive vacation out of the U.S. within the last 12 months; and C) Overall–the combined representation of both groups combined, generally providing the most accurate data analysis.
4. Where helpful, a chart or series of charts are displayed after a given question's response, to graphically represent significant portions of the data.
5. Where there is a significant finding, a subjective analysis of the data is given for application of the reported findings.
6. All data analyzed within this report is taken directly from the survey collected for this study, however, within later sections, a previous consumer study will be clearly identified and referenced for projecting total industry expenditures and other projections.
7. Although the 'Overall' classification contains the outlined error rates, caution should be exercised in interpreting any segmentation data with a count of less than 50 subjects. The certified versus active segmentation breakdowns are provided for a point of reference only, the main trends and analysis will be focused on the 'Overall' heading, or the total response for a given question. The results from this consumer study are as follows:

Section A. Consumer Demographics Q3.1 Your gender?

Q3.1 Gender	**Certified** Count	Q3.1 Percent	**Active** Count	Q3.1 Percent	**Overall** Count	Valid Percent
Male	57	76.0	43	84.3	100	79.4
Female	18	24.0	8	15.7	26	20.6
Total	75	100.0	51	100	126	100

Conclusions Clearly, males make up the largest percentage of divers, and appear to comprise almost 80% of all participants. This number climbs to 84% for active divers, and drops to 76% for the certified group, indicated that female divers are lost when moving from the certified group to the active group.

Q3.2 What is your age?

Q3.2 Age	Certified Count	Q3.2 Percent	Active Count	Q3.2 Percent	Overall Count	Valid Percent
18 Years or Younger	3	4.2	1	2.0	4	3.3
19 to 24	10	13.9	1	2.0	11	9.1
25 to 29	10	13.9	4	8.2	14	11.6
30 to 34	12	16.7	6	12.2	18	14.9
35 to 39	10	13.9	9	18.4	19	15.7
40 to 44	7	9.7	7	14.3	14	11.6
45 to 49	9	12.5	11	22.4	20	16.5
50 to 55	11	15.3	9	18.4	20	16.5
56 to 60			1	2.0	1	0.8
Total	72	100.0	49	100	121	100
Mean	36.6		41.8		39.2	
Median	35.0		42.0		38.5	
Mode	26.0		42.0		34.0	
* Multiple modes exist. The smallest value is shown.						

Conclusions The average age of divers' climbs from the active group, indicating a younger participant, when compared to the active group (nearly 37 years for the certified group, compared to nearly 42 for the active group). This would also point to a shift in ages, as a diver moves from the certified group to the active group. Interestingly, over 18% of the respondents for the certified group are 24 years our younger, whereas only 4% of the active group are 24 years our younger. This clearly indicates a large percentage of younger divers are certified, then do not move to the active status.

Q3.6 In what kind of business, industry or profession do you work?

Q3.6 Profession	Certified Count	Q3.6 Percent	Active Count	Q3.6 Percent	Overall Count	Valid Percent
Professional	17	23.0	8	16.3	25	20.3
Medical	5	6.8	7	14.3	12	9.8
Technical	8	10.8	13	26.5	21	17.1
Administrative	6	8.1	5	10.2	11	8.9
Government	9	12.2	4	8.2	13	10.6
Laborer	9	12.2	9	18.4	18	14.6
Student	11	14.9		0.0	11	8.9
Housewife		0.0	1	2.0	1	0.8
Creative Professions	7	9.5	1	2.0	8	6.5
Diving Professions	2	2.7	1	2.0	3	2.4
Total	74	100.0	49	100.0	123	100

Conclusions As indicated, the largest percentage of consumers work in the professional and technical fields. However, a slight difference is notices between the two groups when the professional and technical fields are analyzed, perhaps indicating that more divers remain active in the technical occupations.

Q3.7 What was your total household income before taxes in 1995?

Q3.7 Income	Certified Count	Q3.7 Percent	Active Count	Q3.7 Percent	Overall Count	Valid Percent
$19,000 or Less	20	26.7	10	19.6	30	23.8
$20,000 to $29,999	3	4.0	2	3.9	5	4.0
$30,000 to $39,999	10	13.3	3	5.9	13	10.3
$40,000 to $49,999	9	12.0	3	5.9	12	9.5
$50,000 to $59,999	3	4.0	7	13.7	10	7.9
$60,000 to $69,999	8	10.7	3	5.9	11	8.7
$70,000 to $79,999	2	2.7	4	7.8	6	4.8
$80,000 to $89,999	4	5.3	2	3.9	6	4.8
$90,000 to $99,999	2	2.7	1	2.0	3	2.4
$100,000 to $109,999	5	6.7	4	7.8	9	7.1
$110,000 to $119,999	1	1.3	1	2.0	2	1.6
$120,000 or More	8	10.7	11	21.6	19	15.1
Total	75	100.0	51	100	126	100
Mean	$69,151		$96,585		$82,868	
Median	$55,000		$75,000		$65,000	
Mode	$60,000		$50,000		$55,000	

Conclusions When the averages are reviewed, we see that the average income of the active group is substantially higher than the certified group ($69,000 for the certified group and $97,000 for the active group). As this difference is substantial, this may indicate that the active, traveling diver that remains active may tend to have higher household incomes than those in the certified group.

Consumer Study Results Following are various notes that will help in interpreting the charts, tables and conclusions within this report:

1. The responses to each question are grouped according to similar classifications and are listed in numerical order of response. The total number of subjects responding to each question are also indicated.
2. All answers are listed in percentages or mean (average) figures for a given response. Some responses total more that 100% due to survey subjects responding with multiple answers. The actual number of responses are listed after each percentage breakdown and labeled 'Count'.
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$40,000 to $49,999	9	12.0	3	5.9	12	9.5
$50,000 to $59,999	3	4.0	7	13.7	10	7.9
$60,000 to $69,999	8	10.7	3	5.9	11	8.7
$70,000 to $79,999	2	2.7	4	7.8	6	4.8
$80,000 to $89,999	4	5.3	2	3.9	6	4.8
$90,000 to $99,999	2	2.7	1	2.0	3	2.4
$100,000 to $109,999	5	6.7	4	7.8	9	7.1
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Median	$55,000		$75,000		$65,000	
Mode	$60,000		$50,000		$55,000	

Conclusions When the averages are reviewed, we see that the average income of the active group is substantially higher than the certified group ($69,000 for the certified group and $97,000 for the active group). As this difference is substantial, this may indicate that the active, traveling diver that remains active may tend to have higher household incomes than those in the certified group.

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VII. Consumer Diving Activities

Q1.1 What is your highest diver certification level?

Q1.1 Certification Level	Certified Count	Percent	Active Count	Percent	Overall Count	Valid Percent
Open Water or Equivalent	50	66.7	18	35.3	68	54.0
Advanced or Equivalent	0	0.0	17	33.3	17	13.5
Rescue or Equivalent	13	17.3	7	13.7	20	15.9
Divemaster or Equivalent	8	10.7	3	5.9	11	8.7
Assistant Instructor or Equivalent	1	1.3	2	3.9	3	2.4
Instructor or Equivalent	3	4.0	4	7.8	7	5.6
Total	75	100.0	51	100.0	126	100.0

Conclusions As evident, the certified group has a much higher proportion of entry-level certified divers. Whereas the actives appear to be more evenly distributed. Overall, the majority of divers are certified at the Open Water or equivalent level.

Q1.2 Through which agency were you last certified?

Q1.2 Cert. Agency	Active Count	Percent
IDEA	2	3.9
NASDS	2	3.9
NAUI	9	17.6
PADI	33	64.7
SSI	2	3.9
YMCA	1	2.0
Other	2	3.9
Total	51	100.0

Conclusions As the entire list for the certified sample came from PADI, only the active group is reported, due the bias of the PADI list in this question. However, among active divers, PADI has roughly a 65% marketshare, with NAUI coming in at 18%. All others have too few respondents to accurately determine ranking.

Q1.3 How many years have you been actively scuba diving?

Q1.3	Certified		Active		Overall	Valid
Years Act. Diving	Count	Percent	Count	Percent	Count	Percent
0 Years	1	1.4			1	0.8
3 Years or Less	14	18.9	12	23.5	26	20.8
4 to 7 Years	44	59.5	13	25.5	57	45.6
8 to 15 Years	12	16.2	18	35.3	30	24.0
16 Years or More	3	4.1	8	15.7	11	8.8
Total	74	100.0	51	100.0	125	100.0

	Certified	Active	Overall
Mean	6.7	9.6	8.1
Median	5.0	8.0	6.5
Mode	5.0	3.0	4.0

Conclusions As indicated, the average certified diver has been active for roughly 7 years, whereas the active diver has been active for almost 10 years. It should be noted that respondents may have answered this question with their total certification time, rather than actual active years diving.

Q1.4 Approximately, how many dives have you completed to date?

Q1.4 Dives to Date	Certified Count	Q1.4 Percent	Active Count	Q1.4 Percent	Overall Count	Valid Percent
0 Dives	1	1.3			1	0.8
10 Dives or Less	13	17.3	2	3.9	15	11.9
11 to 21 Dives	6	8.0	3	5.9	9	7.1
21 to 30 Dives	3	4.0	1	2.0	4	3.2
31 to 40 Dives	3	4.0	2	3.9	5	4.0
41 to 60 Dives	4	5.3	7	13.7	11	8.7
61 to 80 Dives	8	10.7	3	5.9	11	8.7
81 to 100 Dives	9	12.0	7	13.7	16	12.7
101 to 150 Dives	11	14.7	8	15.7	19	15.1
151 to 200 Dives	7	9.3	8	15.7	15	11.9
201 or More Dives	10	13.3	10	19.6	20	15.9
Total	75	100.0	51	100.0	126	100.0

	Certified	Active	Overall
Mean	154.9	402.8	278.9
Median	75	105	90
Mode	100	100	100

Conclusions As indicated and what would expected, the active group has completed nearly 3 times as many dives as the certified group. It is interesting to note that the largest part of the certified group has completed less than 10 dives (17%).

Q1.5 How many dives have you completed in the last 12 months?

Q1.5 Dives Last 12 Mo.	Certified Count	Q1.5 Percent	Active Count	Q1.5 Percent	Overall Count	Valid Percent
0 Dives	25	33.3	1	2.0	26	17.7
5 Dives or Less	16	21.3	4	7.8	20	14.6
6 to 10 Dives	7	9.3	10	19.6	17	14.5
11 to 20 Dives	10	13.3	11	21.6	21	17.5
21 to 30 Dives	7	9.3	12	23.5	19	16.4
31 Dives or More	10	13.3	13	25.5	23	19.4
Total	75	100.0	51	100.0	126	100.0

	Certified	Active	Overall
Mean	15.3	35.2	25.3
Median	5	20	12.5
Mode	0	30	

Conclusions As indicated, 33% of the certified group did not dive at all in the last 12 months. As what would be expected, 90% of the active group have been diving have been diving at least 5 dives or more.

Q1.6 How many dive vacations out of the U.S. did you take last year?

Q1.6 Vacations Last Yr	Certified Count	Q1.6 Percent	Active Count	Q1.6 Percent	Overall Count	Valid Percent
No Trips	45	61.6	12	23.5	57	46.0
1	14	19.2	25	49.0	39	31.5
2	10	13.7	8	15.7	18	14.5
3	1	1.4	3	5.9	4	3.2
4	1	1.4	2	3.9	3	2.4
6	1	1.4			1	0.8
8	1	1.4			1	0.8
10 Trips			1	2.0	1	0.8
Total	73	100.0	51	100.0	124	100.0

Mean	0.8	1.3	1.0
Median	0	1	0.5
Mode	0	1	0.5

Conclusions Again, as reflective with the diving activity, a large portion of the certified group did not take a dive vacation last year, as compared to the active group (62% for certified and 24% for active).

Q1.7 Approximately, how much total did you spend on vacations out of the U.S. last year in which you participated in diving activities (including airfares, activities, food, lodging, diving etc.)?

Q1.7 Spent on Dive Trips	Certified Count	Q1.7 Percent	Active Count	Q1.7 Percent	Overall Count	Valid Percent
0$	28	43.1	4	8.2	32	28.1
$500 or Less	1	1.5	3	6.1	4	3.5
$501 to $1,000	4	6.2	3	6.1	7	6.1
$1,001 to $1,500	5	7.7	5	10.2	10	8.8
$1,501 to $2,000	6	9.2	11	22.4	17	14.9
$2,001 to $2,500	3	4.6	4	8.2	7	6.1
$2,501 to $3,000	4	6.2	5	10.2	9	7.9
$3,001 or More	14	21.5	14	28.6	28	24.6
Total	65	100.0	49	100.0	114	100.0

Mean	$1,902	$2,947	$2,424
Median	$1,000	$2,000	$1,500
Mode	$0	$2,000	$1,000

Conclusions This table clearly proves a relationship between diving activity and travel expenditures, as the average active group participant spent over $1,000 more on diving activities in 1995.

Dive Trip Expenditures Crosstab Analysis Using the information reported in the above question, it is possible to crosstabulated dive trip expenditure by a variety of questions, creating a profile for the largest dive travel spenders.

Q1.7-1 Vacation Expenditures by Certification Level

Q1.1 by Q1.7 Certification Level	Certified Count	Percent	$ Spent Vacat	Active Count	Percent	$ Spent Vacat	Overall Count	Percent	$ Spent Vacat
Open Water or Equivalent	27	36.0	$1,052	18	35.3	$2,586	45	35.7	$1,819
Advanced or Equivalent	23	30.7	$2,465	17	33.3	$3,088	40	31.7	$2,777
Rescue or Equivalent	13	17.3	$1,654	7	13.7	$2,292	20	15.9	$1,973
Divemaster or Equivalent	8	10.7	$713	3	5.9	$3,433	11	8.7	$2,073
Assistant Instructor or Equivalent	1	1.3	$0	2	3.9	$2,300	3	2.4	$2,300
Instructor or Equivalent	3	4.0	$3,767	4	7.8	$3,600	7	5.6	$3,683
Total/Average	75	100.0	$1,648	51	100.0	$2,831	126	100.0	$2,240

Conclusions As evident, the higher the certification, the more spent on dive vacation.

Q1.7-2 Vacation Expenditures by Number of Dives Completed to Date

QG1.4 by Q1.7 Dives to Date	Certified Count	Percent	$ Spent Vacat	Active Count	Percent	$ Spent Vacat	Overall Count	Percent	$ Spent Vacat
10 Dives or Less	14	18.7	$1,478	2	3.9	$75	16	12.7	$777
11 to 21 Dives	6	8.0	$1,095	3	5.9	$4,000	9	7.1	$2,548
21 to 30 Dives	3	4.0	$361	1	2.0	$0	4	3.2	$361
31 to 40 Dives	3	4.0	$0	2	3.9	$1,200	5	4.0	$1,200
41 to 60 Dives	4	5.3	$500	7	13.7	$2,443	11	8.7	$1,471
61 to 80 Dives	8	10.7	$2,699	3	5.9	$3,933	11	8.7	$3,316
81 to 100 Dives	9	12.0	$567	7	13.7	$2,050	16	12.7	$1,308
101 to 150 Dives	11	14.7	$1,808	8	15.7	$2,937	19	15.1	$2,372
151 to 200 Dives	7	9.3	$3,675	8	15.7	$2,688	15	11.9	$3,181
201 or More Dives	10	13.3	$3,204	10	19.6	$4,160	20	15.9	$3,682
Totals	75	100.0	$1,648	51	100.0	$2,831	126	100.0	$2,240

Conclusions As what would be expected, there is a clear relationship between diver activity and travel expenditures. The highest reported expenditures are with divers that have made 201 or more dives.

Q1.7-3 Vacation Expenditures by Number of Dives Completed in the Last 12 Months

Q1.5 by Q1.7 Dives in Lst 12 Mo	Certified Count	Percent	$ Spent Vacat	Active Count	Percent	$ Spent Vacat	Overall Count	Percent	$ Spent Vacat
5 Dives or Less	41	54.7	$1,198	5	9.8	$1,830	46	36.5	$1,514
6 to 10 Dives	7	9.3	$1,529	10	19.6	$1,780	17	13.5	$1,654
11 to 20 Dives	10	13.3	$1,320	11	21.6	$2,381	21	16.7	$1,851
21 to 30 Dives	7	9.3	$2,900	12	23.5	$3,192	19	15.1	$3,046
31 Dives or More	10	13.3	$3,030	13	25.5	$4,073	23	18.3	$3,552
Totals	75	100.0	$1,648	51	100.0	$2,831	126	100.0	$2,240

Conclusions Again, the highest reported expenditures are with divers that have made 20 or more or more dives within the last 12 months.

Q1.7-4 Vacation Expenditures by Respondent’s Gender

Q1.7 by Q3.1 Gender	Certified Count	Percent	$ Spent Vacat	Active Count	Percent	$ Spent Vacat	Overall Count	Percent	$ Spent Vacat
Male	57	76.0	$1,779	43	84.3	$2,784	100	79.4	$2,281
Female	18	24.0	$1,233	8	15.7	$3,088	26	20.6	$2,160
Total/Average	75	100.0	$1,648	51	100	$2,831	126	100	$2,240

Conclusions Among the certified group, males spend nearly $500 more than females on dive vacations, whereas among the active group, females spend almost $800 more. However, when both groups are averaged, males spend slightly more on dive travel than females.

Q1.7-5 Vacation Expenditures by Respondent's Age Classifications

Q1.7 by Q3.2R Age	Certified Count	Percent	$ Spent Vacat	Active Count	Percent	$ Spent Vacat	Overall Count	Percent	$ Spent Vacat
18 Years or Younger	3	4.2	$333	1	2.0	$150	4	3.3	$242
19 to 24	10	13.9	$350	1	2.0	$0	11	9.1	$350
25 to 29	10	13.9	$2,000	4	8.2	$2,563	14	11.6	$2,281
30 to 34	12	16.7	$1,750	6	12.2	$1,617	18	14.9	$1,683
35 to 39	10	13.9	$850	9	18.4	$1,422	19	15.7	$1,136
40 to 44	7	9.7	$1,786	7	14.3	$3,249	14	11.6	$2,518
45 to 49	9	12.5	$1,456	11	22.4	$4,273	20	16.5	$2,864
50 to 55	11	15.3	$3,200	9	18.4	$2,639	20	16.5	$2,919
56 to 60				1	2.0	$2,500	1	0.8	$2,500
Total/Average	72	100.0	$1,594	49	100	$2,631	121	100	$1,833

Conclusions The largest spending group appears to be within the 50 to 55 age bracket, with the three age classifications beneath following closely (40 to 49). There is a slightly younger peak among the active group (45 to 49) as compared to the certified group (50 to 55). The largest drops in expenditures appear to come from the 35 to 39 group, possibly accounting for family or career commitments at that stage in their lives.

Q1.7-6 Vacation Expenditures by Respondent's Profession

Q1.7 by Q3.6 Profession	Certified Count	Percent	$ Spent Vacat	Active Count	Percent	$ Spent Vacat	Overall Count	Percent	$ Spent Vacat
Professional	17	23.0	$3,294	8	16.3	$3,450	25	20.3	$3,372
Medical	5	6.8	$500	7	14.3	$3,779	12	9.8	$2,139
Technical	8	10.8	$838	13	26.5	$2,985	21	17.1	$1,911
Administrative	6	8.1	$2,000	5	10.2	$2,220	11	8.9	$2,110
Government	9	12.2	$1,122	4	8.2	$1,013	13	10.6	$1,067
Laborer	9	12.2	$1,500	9	18.4	$2,155	18	14.6	$1,828
Student	11	14.9	$882		0.0		11	8.9	$882
Housewife		0.0		1	2.0	$2,500	1	0.8	$2,500
Creative Professions	7	9.5	$1,586	1	2.0	$0	8	6.5	$1,586
Diving Professions	2	2.7	$1,000	1	2.0	$10,000	3	2.4	$5,500
Total/Average	74	100.0	$1,648	49	100.0	$2,831	123	100.0	$2,240

Conclusions As what would be expected, the professional classification is among the highest. However, it should be noted that any count response below 8 should be viewed as exploratory data only.

Q1.7-7 Vacation Expenditures by Respondent's Household Income

Q1.7 by Q3.7 Income	Certified Count	Percent	$ Spent Vacat	Active Count	Percent	$ Spent Vacat	Overall Count	Percent	$ Spent Vacat
$19,000 or Less	17	23.0	$3,294	8	16.3	$3,450	25	20.3	$3,372
$20,000 to $29,999	5	6.8	$500	7	14.3	$3,779	12	9.8	$2,139
$30,000 to $39,999	8	10.8	$838	13	26.5	$2,985	21	17.1	$1,911
$40,000 to $49,999	6	8.1	$2,000	5	10.2	$2,220	11	8.9	$2,110
$50,000 to $59,999	9	12.2	$1,122	4	8.2	$1,013	13	10.6	$1,067
$60,000 to $69,999	9	12.2	$1,500	9	18.4	$2,155	18	14.6	$1,828
$70,000 to $79,999	11	14.9	$882		0.0		11	8.9	$882
$80,000 to $89,999									
$90,000 to $99,999		0.0		1	2.0	$2,500	1	0.8	$2,500
$100,000 to $109,999									
$110,000 to $119,999	7	9.5	$1,586	1	2.0	$0	8	6.5	$1,586
$120,000 or More	2	2.7	$1,000	1	2.0	$10,000	3	2.4	$5,500
Total/Average	74	100.0	$1,648	49	100.0	$2,831	123	100.0	$2,289

Conclusions Interestingly, one of the highest vacation expenditure groups is one of the lowest income classifications ($19,000 or less). This may be picking up student dive travel, where a parent or other is paying for travel. Additionally, the second lowest classification, $20,000 to $29,000, is very high as well.

Q1.7-8 Vacation Expenditures by Date of Last Dive Equipment Purchase

Q2.3 by Q1.7 Date Last Purchase.	Certified Count	Percent	$ Spent Vacat	Active Count	Percent	$ Spent Vacat	Overall Count	Percent	$ Spent Vacat
Less Than 1 Year	24	34.3	$1,588	21	42.0	$2,383	45	37.5	$1,985
1.1 to 2 Years	10	14.3	$4,700	20	40.0	$3,622	30	25.0	$4,161
2.1 to 3 Years	7	10.0	$786	8	16.0	$1,863	15	12.5	$1,324
3.1 to 4 Years	7	10.0	$1,186	1	2.0	$2,000	8	6.7	$1,593
4.1 to 5 Years	8	11.4	$163	0	0.0	$0	8	6.7	$163
5.1 Years or More	14	20.0	$871	0	0.0	$0	14	11.7	$871
Total	70	100.0	$1,606	50	100.0	$2,788	120	100.0	$2,197

Conclusions This question compares the date of a consumers last dive equipment purchase to their average dive travel expenditure. Furthermore, this table indicate a clear relationship between purchasing dive equipment and trip expenditures. As indicated, the largest dive travel expenditures are with divers that have purchased a piece of equipment, costing more than $100, within the last 2 years. The largest average appears with divers not purchasing for at least 1 year, but not more than 2 years ($4,161 overall average).

Q1.7-9 Vacation Expenditures by Region of Residency

Q3.8 by Q1.7 Vacation Expend.	Certifed Cases	Percent	Average $Travel	Active Count	Percent	Average $Travel	Overall Count	Valid Percent	Average $Travel
Western Region	9	17.6	$1,222	9	17.6	$3,239	9	17.6	$2,231
Midwestern Region	19	37.3	$1,163	19	37.3	$2,863	19	37.3	$2,013
Eastern Region	23	45.1	$1,848	23	45.1	$2,645	23	45.1	$2,247
Overall Average	51	100.0	$1,482	51	100.0	$2,831	51	100.0	$2,157

Conclusions Although there are slight variations among the two groups, generally, all three regions spend equally for dive vacations as a whole. Slight increases are seen on the Eastern Region for the certified group, and the Midwest for the active group.

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VIII. Diving Equipment Brand Purchasing and Use Habits

Q2.1 How much total, in your best estimate, have you spent on diving equipment since being certified?

Q2.1 Spent on Dive Equip.	Certified Count	2.1R Percent	Active Count	2.1R Percent	Overall Count	Valid Percent
$0	3	4.1				
$500 or Less	17	23.3	6	12.0	23	18.7
$501 to $1,000	9	12.3	7	14.0	16	13.0
$1,001 to $1,500	6	8.2	6	12.0	12	9.8
$1,501 to $2,000	12	16.4	7	14.0	19	15.4
$2,001 to $2,500	4	5.5	3	6.0	7	5.7
$2,501 to $3,000	9	12.3	6	12.0	15	12.2
$3,001 to $3,500	3	4.1	1	2.0	4	3.3
$3,501 to $4,001	3	4.1	1	2.0	4	3.3
$4,001 to $4,500			1	2.0	1	0.8
$4,501 or More	7	9.6	12	24.0	19	15.4
Total	73	100.0	50	100.0	123	100.0
Mean	$1,992		$3,377		$2,685	
Median	$1,900		$2,000		$1,950	
Mode	$2,000		$2,000		$2,000	

Conclusions Again, as illustrated in question 1.7 dive travel activities, there is a clear difference in the activity level of divers and the corresponding amount they spend on dive equipment. In this case, the active diver group has spent almost $1,400 more on equipment purchases since certification.

Dive Equipment Expenditure Crosstab Analysis Using the information reported in the above question, it is possible to crosstabulate dive equipment expenditure by a variety of questions, creating a profile for the largest dive travel spenders.

Q2.1-1 Dive Equipment Expenditures by Certification Level

Q1.1 by Q2.1 Certification Level	Certified Count	Percent	$ Spent Equip.	Active Count	Percent	$ Spent Equip.	Overall Count	Percent	$ Spent Equip.
Open Water or Equivalent	27	36.0	$896	18	35.3	$2,036	45	35.7	$1,466
Advanced or Equivalent	23	30.7	$1,791	17	33.3	$2,971	40	31.7	$2,381
Rescue or Equivalent	13	17.3	$3,069	7	13.7	$4,016	20	15.9	$3,543
Divemaster or Equivalent	8	10.7	$2,875	3	5.9	$4,700	11	8.7	$3,788
Assistant Instructor or Equivalent	1	1.3	$2,000	2	3.9	$2,250	3	2.4	$2,125
Instructor or Equivalent	3	4.0	$5,033	4	7.8	$8,750	7	5.6	$6,892
Total/Average	75	100.0	$1,939	51	100.0	$3,311	126	100.0	$2,625

Conclusions As evident, the higher the certification, the more spent on dive equipment. However, there are significant increases in equipment purchases among the Rescue or Equivalent level.

Q2.1-2 Dive Equipment Expenditures by Number of Dives Completed to Date

QG 1.4 by Q2.1 Dives to Date	Certified Count	Percent	$ Spent Equip	Active Count	Percent	$ Spent Equip	Overall Count	Percent	$ Spent Equip
10 Dives or Less	14	18.7	$618	2	3.9	$275	16	12.7	$447
11 to 21 Dives	6	8.0	$550	3	5.9	$1,267	9	7.1	$909
21 to 30 Dives	3	4.0	$1,500	1	2.0	$2,000	4	3.2	$1,750
31 to 40 Dives	3	4.0	$1,233	2	3.9	$2,750	5	4.0	$1,992
41 to 60 Dives	4	5.3	$1,125	7	13.7	$2,514	11	8.7	$1,820
61 to 80 Dives	8	10.7	$1,769	3	5.9	$2,367	11	8.7	$2,068
81 to 100 Dives	9	12.0	$2,189	7	13.7	$1,643	16	12.7	$1,916
101 to 150 Dives	11	14.7	$3,091	8	15.7	$3,139	19	15.1	$3,115
151 to 200 Dives	7	9.3	$2,857	8	15.7	$3,438	15	11.9	$3,148
201 or More Dives	10	13.3	$3,290	10	19.6	$6,820	20	15.9	$5,055
Totals	75	100.0	$1,939	51	100.0	$3,311	126	100.0	$2,625

Conclusions As what would be expected, there is a clear relationship between diver activity and equipment expenditures. The highest reported expenditures are with divers that have made 201 or more dives.

Q2.1-3 Dive Equipment Expenditures by Number of Dives Completed in the Last 12 Months

Q1.5 by Q2.1 Dives in Lst 12 Mo	Certified Count	Percent	$ Spent Equip	Active Count	Percent	$ Spent Equip	Overall Count	Percent	$ Spent Equip
5 Dives or Less	41	54.7	$1,558	5	9.8	$1,870	46	36.5	$1,714
6 to 10 Dives	7	9.3	$844	10	19.6	$1,830	17	13.5	$1,337
11 to 20 Dives	10	13.3	$1,957	11	21.6	$2,638	21	16.7	$2,298
21 to 30 Dives	7	9.3	$489	12	23.5	$3,383	19	15.1	$1,936
31 Dives or More	10	13.3	$2,800	13	25.5	$5,508	23	18.3	$4,154
Totals	75	100.0	$1,787	51	100.0	$3,311	126	100.0	$2,549

Conclusions The highest reported expenditures are with divers that have made 30 or more dives within the last 12 months.

Q2.1-4 Dive Equipment Expenditures by Dive Travel Expenditures

Q1.7 by Q2.1 Spent on Vacations	Certified Count	Percent	$ Spent Equip	Active Count	Percent	$ Spent Equip	Overall Count	Percent	$ Spent Equip
$500 or Less	39	52.0	$1,572	9	17.6	$2,250	48	38.1	$1,911
$501 to $1,000	4	5.3	$1,500	3	5.9	$2,000	7	5.6	$1,750
$1,001 to $1,500	5	6.7	$2,170	5	9.8	$2,560	10	7.9	$2,365
$1,501 to $2,000	6	8.0	$1,000	11	21.6	$2,591	17	13.5	$1,796
$2,001 to $2,500	3	4.0	$1,867	4	7.8	$4,500	7	5.6	$3,184
$2,501 to $3,000	4	5.3	$3,125	5	9.8	$4,403	9	7.1	$3,764
$3,001 or More	14	18.7	$3,082	14	27.5	$4,379	28	22.2	$3,731
Totals	75	100.0	$1,939	51	100.0	$3,311	126	100.0	$2,625

Conclusions Clearly, divers that spend more on dive travel, spend more on dive equipment. As indicated, divers that spend in excess of $2,000 annually on dive travel, spend almost twice as much on dive equipment each year. This response proves a clear relationship between travel and equipment expenditures.

Q2.1-5 Dive Equipment Expenditures by Respondent's Gender

Q3.1 by Q2.1 Gender by $Equip	Certified Count	Percent	Average $Equip	Active Count	Percent	Average $Equip	Overall Count	Percent	Average $Equip
Male	57	76.0	$2,163	43	84.3	$3,562	100	79.4	$2,863
Female	18	24.0	$1,228	8	15.7	$1,963	26	20.6	$1,595
Total/Average	75	100.0	$1,695	51	100.0	$2,762	126	100.0	$2,229

Conclusions As indicated, male respondents spent on average, overall, almost $1,300 more on dive equipment than females respondents. These differences are even more pronounced in the active group, where males spend nearly $1,600 more.

Q2.1-6 Dive Equipment Expenditures by Respondent's Age

Q3.2 by Q2.1 Age	Certified Count	Percent	Average $Equip	Active Count	Percent	Average $Equip	Overall Count	Percent	Average $Equip
18 Years or Younger	3	4.2	$700	1	2.1	$350	4	3.3	$525
19 to 24	10	13.9	$665	1	2.1	$200	11	9.2	$433
25 to 29	10	13.9	$1,980	4	8.3	$2,550	14	11.7	$2,265
30 to 34	12	16.7	$2,483	6	12.5	$2,917	18	15.0	$2,700
35 to 39	10	13.9	$2,660	9	18.8	$2,489	19	15.8	$2,574
40 to 44	7	9.7	$2,057	7	14.6	$4,159	14	11.7	$3,108
45 to 49	9	12.5	$2,244	11	22.9	$4,218	20	16.7	$3,231
50 to 55	11	15.3	$1,914	9	18.8	$3,189	20	16.7	$2,551
Total/Average	72	100.0	$1,838	48	100.0	$2,509	120	100.0	$2,173

Conclusions What might be expected, the older the participant (to the age 49), the larger the dive equipment expenditure. This trend stops at the 50 to 55 age classification. The largest age equipment expenditure group is the 45 to 49 age classification.

Q2.1-7 Dive Equipment Expenditures by Respondent's Residency

Q3.8 by Q2.1 Region	Certified Count	Valid Percent	Average Equip$	Active Count	Percent	Average Equip$	Overall Count	Valid Percent	Average Equip$
Midwestern Region	13	17.3	$1,473	9	17.6	$4,039	22	17.5	$2,756
Eastern Region	36	48.0	$2,024	19	37.3	$2,958	55	43.7	$2,491
Western Region	26	34.7	$2,054	23	45.1	$3,318	49	38.9	$2,686
Total	75	100.0	$1,939	51	100.0	$3,311	126	100.0	$2,644

Conclusions It appears that the Midwest region spends more for dive equipment than elsewhere, in the active group. However, when all are averaged, all three spend nearly the same amount.

Q2.2 What was the last piece of diving equipment you purchased that cost in excess of $100 (if more than one, please list the most expensive)?

Q2.2 Last Piece Bought	Certified Count	Q2.2 Percent	Active Count	Q2.2 Percent	Overall Count	Valid Percent
BCD	14	18.7	10	19.6	24	19.0
Nothing	16	21.3	6	11.8	22	17.5
Dive Computer	11	14.7	10	19.6	21	16.7
Regulator	11	14.7	2	3.9	13	10.3
Wetsuit	6	8.0	4	7.8	10	7.9
Tank	1	1.3	5	9.8	6	4.8
Dry Suit	3	4.0	1	2.0	4	3.2
U/W Video Housing	3	4.0	1	2.0	4	3.2
Camera Gear	2	2.7	2	3.9	4	3.2
Other			4	8.0	4	3.2
Dive Watch	1	1.3	2	3.9	3	2.4
Mask	2	2.7	1	2.0	3	2.4
Fins	2	2.7	1	2.0	3	2.4
Snorkeling Gear	2	2.7	1	2.0	3	2.4
Knife	1	1.3			1	0.8
Dive Light			1	2.0	1	0.8
Total	75	100.0	51	100.0	126	100.0

Conclusions Interestingly, the number one item costing $100 or more purchased was a BCD, followed by 'noting' and diving computers. Actually, given the error rates for the overall classification, little differences are reported between the second, third and fourth line items. However, the BCD is clearly the number one classification, overall.

Q2.3 What was the approximate month and year of the purchase (referring to question 2.2)?

Q2.3 Date Last Purchase	Certified Count	Q2.3R Percent	Active Count	Q2.3R Percent	Overall Count	Valid Percent
Less Than 1 Year	24	34.3	21	42.0	45	37.5
1.1 to 2 Years	10	14.3	20	40.0	30	25.0
2.1 to 3 Years	7	10.0	8	16.0	15	12.5
3.1 to 4 Years	7	10.0	1	2.0	8	6.7
4.1 to 5 Years	8	11.4			8	6.7
5.1 Years or More	14	20.0			14	11.7
Total	70	100.0	50	100.0	120	100.0

	Certified	Active	Overall
Mean	4.3	1.3	2.8
Median	2.7	1.3	2.0
Mode*	0.2	1.3	0.7

* Multiple modes exist. The smallest value is shown.

Conclusions When the two groups are compared, there is again a significant difference between buying frequency for the active group as compared to the certified group (4.3 years for last purchase for the certified group and 1.3 year for the active group).

Date of Last Equipment Purchase Crosstab Analysis
Q2.3-1 Dive Equipment Expenditures by Date of Last Dive Equipment Purchase

Q2.3 by Q2.1	Certified		$ Spent	Active		$ Spent	Overall		$ Spent
Date Last Purchase.	Count	Percent	Equip	Count	Percent	Equip	Count	Percent	Equip
Less Than 1 Year	24	34.3	$1,558	21	42.0	$3,757	45	37.5	$2,658
1.1 to 2 Years	10	14.3	$3,650	20	40.0	$3,298	30	25.0	$3,474
2.1 to 3 Years	7	10.0	$2,643	8	16.0	$2,563	15	12.5	$2,603
3.1 to 4 Years	7	10.0	$1,457	1	2.0	$2,000	8	6.7	$1,729
4.1 to 5 Years	8	11.4	$1,475	0	0.0	$0	8	6.7	$1,475
5.1 Years or More	14	20.0	$1,486	0	0.0	$0	14	11.7	$1,486
Total	70	100.0	$1,931	50	100.0	$3,347	120	100.0	$2,639

Conclusions This question compares the date of a consumers last dive equipment purchase to their average dive equipment expenditure. As indicated, those that purchased within the last two years tend to spend more, overall, on dive equipment.

Q2.4 Who was the manufacturer or brand of the item purchased (referring to question 2.2)?

Q2.4	Certified	Q2.4	Active	Q2.4	Overall	Valid
Last Item	Count	Percent	Count	Percent	Count	Percent
U.S. Divers	10	16.1	9	18.8	19	17.3
Sherwood	7	11.3	8	16.7	15	13.6
Dacor	5	8.1	7	14.6	12	10.9
Seaquest	8	12.9	2	4.2	10	9.1
ScubaPro	5	8.1	3	6.3	8	7.3
Oceanic	5	8.1	1	2.1	6	5.5
Henderson	1	1.6	2	4.2	3	2.7
Mares	1	1.6	2	4.2	3	2.7
Nikonos	2	3.2	1	2.1	3	2.7
Sea & Sea	1	1.6	2	4.2	3	2.7
TUSA/Tabata	3	4.8			3	2.7
Citizen	1	1.6	1	2.1	2	1.8
Harvey's	2	3.2			2	1.8
O'Neil	1	1.6	1	2.1	2	1.8
ORCA	1	1.6	1	2.1	2	1.8
Viking	2	3.2			2	1.8
Beuchat	1	1.6			1	0.9
Body Glove	1	1.6			1	0.9
Cochran			1	2.1	1	0.9
Cressi-Sub	1	1.6			1	0.9
Dive Rite	1	1.6			1	0.9
DUI			1	2.1	1	0.9
Forte	1	1.6			1	0.9
ISI			1	2.1	1	0.9
Pelican			1	2.1	1	0.9
Poseidon			1	2.1	1	0.9
Randoll	1	1.6			1	0.9
Sea Elite			1	2.1	1	0.9
U/S Video	1	1.6			1	0.9
Uwatec			1	2.1	1	0.9
Zeagle			1	2.1	1	0.9
Total	62	100.0	48	100.0	110	100.0

Conclusions Based on the last purchase, U.S. Divers has the number position in the U.S., with Sherwood and Dacor following closely. Given the error rates, there is little difference between the third and fourth brands overall (Dacor and Seaquest) in terms of marketshare. Due to the small sample size, only the first 5 to 6 responses are accurate. This question asked which brand was last purchased, and will vary when compared to question 2.7 asking which brands have ever used or purchased. It is also important to note that this marketshare breakdown reflects items retailing for $100 or more and does not take into account masks, fins, snorkels, or other items retailing for less than $100.

Q2.5 What source was most influential in your decision to select that particular product or brand (referring to question 2.2)?

Q2.5 Purchasing Influence	Certified Count	Valid Percent	# of Cases	Active Count	Valid Percent	# of Cases	Overall Count	Valid Percent	# of Cases
Dive Store Personnel	41	50	60.3	20	33.3	40.8	61	43	84.7
Friend/Other Diver	15	18.3	22.1	15	25	30.6	30	21.1	41.7
Magazine Editorial	3	3.7	4.4	6	10	12.2	9	6.3	12.5
Price	4	4.9	5.9	3	5	6.1	8	5.6	11.1
Other	2	2.4	2.9	5	8.3	10.2	7	4.9	9.7
DEMA Demo	4	4.9	5.9	1	1.7	2.0	5	3.5	6.9
Magazine Advertisement	3	3.7	4.4	1	1.7	2.0	4	2.8	5.6
Direct-Mail Catalog	2	2.4	2.9	2	3.3	4.0	4	2.8	5.6
Quality	3	3.7	4.4	1	1.7	2.0	4	2.8	5.6
Product Brochure	1	1.2	1.5	2	3.3	4.1	3	2.1	4.2
Internet	1	1.2	1.5	2	3.3	4.1	3	2.1	4.2
Previous Experience	1	1.2	1.5	1	1.7	2.0	2	1.4	2.8
Trade-In	1	1.2	1.5				1	0.7	1.4
Personal Assessment	1	1.2	1.5				1	0.7	1.4
Total responses	82	100	120.6	60	100	122.4	142	100	197.2

Conclusions As indicated, the dive retail staff ins the single largest source for purchasing dive equipment. According to the certified group, the retailer is used in 60% of the time, as compared to the active group's 41% of the time. However, the 'friend or other diver' refers the active diver almost 20% more than the certified group. As this question was a multiple response answer, the percent a cases is also shown, indicating the percentage of times a particular response was selected. Other significant differences are noted with the magazine editorial classification, as the active group uses this source 12% of the time, whereas the certified group only uses this source 4% of the time. Another interesting point is that price is located equally down the list with both groups, and varies less than .2%.

Source of Purchasing Influence Crosstab Analysis
Q2.5-1 Dive Equipment Expenditures by Source of Purchasing Influence

Q2.5 by QG2.1 Code	Certified Count	Valid Percent	Average $Equip	Active Count	Percent	Average $Equip	Overall Count	Valid Percent	Average $Equip
Dive Store Personnel	40	52.6	$2,159	20	33.3	$3,176	60	44.1	$2,668
Friend/Other Diver	15	19.7	$2,071	15	25.0	$2,596	30	22.1	$2,333
Magazine Advertisement	3	3.9	$3,050	1	1.7	$1,500	4	2.9	$2,275
Magazine Editorial	3	3.9	$3,500	6	10.0	$2,350	9	6.6	$2,925
Direct-Mail Catalog	2	2.6	$1,550	2	3.3	$1,700	4	2.9	$1,625
Product Brochure	1	1.3	$3,000	2	3.3	$5,000	3	2.2	$4,000
Other	2	2.6	$4,000	5	8.3	$7,293	7	5.1	$5,646
DEMA Demo	4	5.3	$2,417	1	1.7	$10,000	5	3.7	$6,209
Price	4	5.3	$2,500	3	5.0	$1,625	7	5.1	$2,063
Internet				2	3.3	$4,250	2	1.5	$4,250
Quality	2	2.6	$1,400	1	1.7	$5,000	3	2.2	$3,200
Previous Experience				1	1.7	$2,000	1	0.7	$2,000
Trade-In									
Personal Assessment				1	1.7	$1,500	1	0.7	$1,500
Total responses	76	100.0	$2,565	60	100.0	$3,692	136	100.0	$3,130

Conclusions This response compares how each respondent is influenced to buy equipment, then compares the average amount spent to date on dive equipment. As evident, dive store personnel influence more sales with the active group than friends' or other divers' influence.

Q2.6 Which single publication (if any) is most influential in your decision to purchase dive equipment?

Q2.6 Pub. Most Influential	Certified Count	Q2.6 Percent	Active Count	Q2.6 Percent	Overall Count	Valid Percent
Skin Diver	15	37.5	12	28.6	27	33.3
Rodale's Scuba Diving	7	17.5	18	42.9	25	30.9
Dive Training	4	10.0	4	9.5	8	9.9
Scuba Times	5	12.5	1	2.4	6	7.4
Other	5	12.5	1	2.4	5	6.2
Sport Diver	2	5.0	1	2.4	3	3.7
Undercurrent			3	7.1	3	3.7
Dive Travel	1	2.5	1	2.4	2	2.5
Discover Diving	1	2.5			1	1.2
In Depth			1	2.4	1	1.2
Total	40	100.0	42	100.0	81	100.0

Conclusions As illustrated, there are large differences between the two groups in terms of publication influence. Skin Diver has the largest influence of the certified group, whereas Scuba Diving has the largest influence for the active group. Both these differences are significant in terms of error rates, and are clearly the most influential for each group. When both groups are combined, statistically, there is little difference in terms of influence between Skin Diver and Scuba Diving, with Skin Diver pulling slightly ahead overall. Dive Training does maintain a clear third place, however, there is a significant difference in terms of response, even with the error rates, between Dive Training and Skin Diver or Scuba Diving.

Publication Crosstab Analysis
Q2.6-1 Dive Equipment Expenditures by Dive Publication Influence

Q2.1 by Q2.6 Pub. Influenence	Certified Count	Percent	$ Spent Equip.	Active Count	Percent	$ Spent Equip.	Overall Count	Percent	$ Spent Equip.
Skin Diver	15	20.0	$2,093	12	23.5	$3,305	27	39.7	$2,699
Rodale's Scuba Diving	7	9.3	$3,086	18	35.3	$3,228	25	36.8	$3,157
Dive Training	4	5.3	$4,375	4	7.8	$6,250	8	11.8	$5,313
Scuba Times	5	6.7	$2,500				5	7.4	$2,500
Undercurrent				3	5.9	$6,000	3	4.4	$6,000
Total/Average	75	100.0	$1,939	51	100.0	$3,311	68	100.0	$2,625

Conclusions It appears that respondents that read Scuba Diving magazine appear to spend more on dive equipment, by almost $1,000, over Skin Diver readers. This trend is equalized with the active group, and Skin Diver's readers outspend Scuba Diving's by less than $100, indicating nearly equal buying power with this active group. However, when both groups are averaged, Scuba Diving magazine's readers spend, on average, almost $500 more on dive equipment than Skin Diver's readers. Although the Dive Training sample is very small, and caution should be exercised when interpreting the results, it appears that Dive Training readers spend, on average, over $2,000 more on dive equipment than Scuba Diving's or Skin Diver's readers. Caution should be used when viewing any data derived from less than 8 responses overall for this question.

Q2.7 Please indicate if you own or have used any dive equipment manufactured by the following companies (check all that apply)?

Q2.7 Equip. Own/Used	Certified Count	Valid Percent	# of Cases	Active Count	Valid Percent	# of Cases	Overall Count	Valid Percent	# of Cases
Dacor	42	13.3	62.7	35	14	68.6	77	13.6	106.9
U.S. Divers	39	12.4	58.2	36	14.4	70.6	75	13.3	104.2
Sherwood	31	9.8	46.3	28	11.2	54.9	59	10.4	81.9
ScubaPro	31	9.8	46.3	16	6.4	31.4	47	8.3	65.3
Seaquest	31	9.8	46.3	14	5.6	27.5	45	8	62.5
TUSA/Tabata	27	8.6	40.3	17	6.8	33.3	44	7.8	61.1
Oceanic	23	7.3	34.3	14	5.6	27.5	37	6.5	51.4
Mares	20	6.3	29.9	15	6	29.4	35	6.2	48.6
Nikonos	18	5.7	26.9	17	6.8	33.3	35	6.2	48.6
Henderson	13	4.1	19.4	16	6.4	31.4	29	5.1	40.3
Cressi-Sub	9	2.9	13.4	11	4.4	21.6	20	3.5	27.8
ORCA	7	2.2	10.4	4	1.6	7.8	11	1.9	15.3
Beuchat	5	1.6	7.5	5	2	9.8	10	1.8	13.9
Zeagle	4	1.3	6.0	5	2	9.8	9	1.6	12.5
Ocean Edge	1	0.3	1.5	7	2.8	13.7	8	1.4	11.1
Other	4	1.3	6.0	1	0.4	2.0	5	0.9	6.9
Cochran	1	0.3	1.5	2	0.8	3.9	3	0.5	4.2
Pro Sub	1	0.3	1.5	2	0.8	3.9	3	0.5	4.2
Sea & Sea	2	0.6	3.0				2	0.4	2.8
Poseidon	1	0.3	1.5	1	0.4	2.0	2	0.4	2.8
Forte	2	0.6	3.0				2	0.4	2.8
U/W Kinetics				1	0.4	2.0	1	0.2	1.4
Winoka				1	0.4	2.0	1	0.2	1.4
Seatech				1	0.4	2.0	1	0.2	1.4
Body Glove				1	0.4	2.0	1	0.2	1.4
O'Neil	1	0.3	1.5				1	0.2	1.4
Viking	1	0.3	1.5				1	0.2	1.4
Harvey's	1	0.3	1.5				1	0.2	1.4
Total Responses	315	100.0	470.1	250	100.0	490.2	565	100.0	784.7
Valid Cases	67			51			118		
Brands per Response	7.0			9.6			6.7		

Conclusions The above table represents a true marketshare in terms of consumer use and purchasing. As this question was a multiple response answer, the percent a cases is also shown, indicating the percentage of times a particular response was selected. As indicated, the top brands are Dacor and U.S. Divers by a significant margin, followed by Sherwood, Scubapro and Seaquest. However when the two groups are analyzed, there are differences between the various brands. It appears that U.S. Divers has the number one position with the active diver group, whereas Dacor has the number one position with the certified group. Other significant differences are noticed with Oceanic, TUSA, Henderson, Cressi-Sub and Ocean Edge between the two groups.

Q2.8 Have you ever purchased any dive equipment through the mail?

Q2.8 Direct-Mail Purchase	Certified Count	Q2.8 Percent	Active Count	Q2.8 Percent	Overall Count	Valid Percent
Yes	19	25.7	28	54.9	47	37.6
No	55	74.3	23	45.1	78	62.4
Total	74	100.0	51	100.0	125	100.0

Conclusions According to the above data, overall, almost 38% of all divers have purchased dive equipment through the mail. However, a significant difference is notices between the two groups, as only 26% of the certified groups has utilized direct-mail, compared to 55% for the active group.

Direct-Mail Crosstab Analysis
Q2.8-1 Dive Equipment Expenditures by Direct-Mail Purchase

Q2.8 by Q2.1 Direct-Mail Purchase	Certified Count	Percent	Equip. Expense	Active Count	Percent	Average $Equip	Overall Count	Valid Percent	Average $Equip
Yes	19	25.7	$2,326	28	54.9	$3,059	47	37.6	$2,693
No	55	74.3	$1,785	23	45.1	$3,618	78	62.4	$2,702
Total/Average	74	100.0	$1,939	51	100.0	$1,939	125	100.0	$2,697

Conclusions Overall, there are little differences in the total amount spent on dive equipment when direct-mail is considered. However, significant differences are noticed among the certified group, as those that utilize direct-mail spend, on average, over $540 more on dive equipment purchases.

Q2.9 Why did you purchase the above mentioned item(s) through the mail (refers to questions 2.8)?

Q2.9 Why Mail Purchase	Certified Count	Valid Percent	# of Cases	Active Count	Valid Percent	# of Cases	Overall Count	Valid Percent	# of Cases
Price	14	42.4	66.7	23	43.4	85.2	37	43.0	97.4
Convenience	6	18.2	28.6	14	26.4	51.9	20	23.3	52.6
Availability	7	21.2	33.3	12	22.6	44.4	19	22.1	50.0
Selection	5	15.2	23.8	4	7.5	14.8	9	10.5	23.7
Other	1	3.0	4.8				1	1.2	2.6
Total responses	33	100.0	157.1	53	100.0	196.3	86	100.0	226.3
Valid Cases	54			48			102		
Reasons per Response	2.9			4.1			2.2		

Conclusions Clearly, the number one reason for utilizing direct-mail is a product's price, with the stoniest response appearing in the certified group. Additionally, convenience and availability are nearly the same overall for second.

Q2.9-1 Dive Equipment Expenditures by Direct-Mail Purchase

Q2.9 by Q1.C Why Mail Purchase	Certified Count	Valid Percent	Average $Equip	Active Count	Percent	Average $Equip	Overall Count	Valid Percent	Average $Equip
Convenience	6	18.2	$2,667	14	25.9	$3,286	20	23.0	$2,976
Selection	5	15.2	$1,763	4	7.4	$5,250	9	10.3	$3,506
Price	14	42.4	$2,720	23	42.6	$3,933	37	42.5	$3,326
Availability	7	21.2	$2,242	13	24.1	$3,758	20	23.0	$3,000
Other	1	3.0	$2,000				1	1.1	$2,000
Total/Average	33	100.0	$2,278	54	100.0	$4,057	87	100.0	$2,962

Conclusions Overall, the largest equipment expenditures were from respondents that selected 'Selection' as the reason for purchasing through the mail. Second and third were 'Price' and 'Availability' for the highest expenditures.

Q2.10 On a scale from 1 to 9, with 1 being not important, and 9 being extremely important, how important are the following to you when considering a new equipment purchase?

Q2.10 What Look For	Certified Mean	Std Dev	Std Err	Valid Cases	Active Mean	Std Dev	Std Err	Valid Cases	Overall Mean	Std Dev	Std Err	Valid Cases
Product Quality	8.7	0.7	.13	74	8.9	0.4	.09	49	8.8	0.5	.11	123
Dependability	8.8	0.6	.11	74	8.7	0.7	.15	49	8.7	0.6	.13	123
Value of Products	7.3	1.8	.34	74	7.8	1.5	.36	48	7.6	1.6	.35	122
Manufacturer Reputation	7.1	1.9	.37	74	7.8	1.4	.32	49	7.4	1.7	.35	123
Features	7.2	1.3	.25	74	7.4	1.3	.31	47	7.3	1.3	.28	121
Warranty Service	7.3	1.8	.34	74	7.3	1.8	.42	49	7.3	1.8	.38	123
Technical Superiority	7.1	1.8	.34	74	7.4	1.6	.38	49	7.3	1.7	.36	123
Customer Service	7.1	1.8	.34	74	7.4	1.7	.40	48	7.3	1.7	.37	122
Price	6.8	2.0	.39	74	6.5	2.0	.47	49	6.6	2.0	.43	123
Product Availability	6.6	2.1	.24	75	6.1	2.7	.38	51	6.3	2.4	.31	126
Looks or Fashion	4.5	2.2	.43	74	4.6	2.0	.48	48	4.5	2.1	.46	122
Overall Average	7.1	1.6	.30	74	7.3	1.5	.34	49	7.2	1.6	.32	123

Conclusions This chart indicates attributes a consumer looks for when selecting a dive product. The most desired attributes for a product, as reported by both groups is Product Quality. As 5 is the midpoint on this scale, indicating neither a positive or negative attribute, this score of 8.8 is extremely positive. Dependability is extremely close to product quality, and given the error rates, statistically very close to product quality as the most desired attributes. Interestingly, little differences are noticeable between these two groups for these desired attributes. Also, price is located near the bottom as an important attribute, however, is significantly above the 5 or midpoint on the scale, so is important, just not nearly as important as the other listed attributes. This question will be compared to the equipment brand matrix in the next section.

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IX. Certified Group Segmentation Responses As identified in the introduction section of this report, this study surveyed a very unique sample, a random pull of the entire PADI certification database. The group labeled 'Certified' represents this unique study, and is anticipated to represent the broadest section of diving consumers ever studied. Because these consumers have never be surveyed before, and they potentially represent a large number of inactive divers, additional questions were added the this sample's survey. These responses are listed in this section, as well as crosstabulations, where appropriate, for the various responses. As in the previous sections, caution should be exercised in interpreting any data where the individual sample count is less than 8 respondents. Data is as follows from the PADI/Certified sample:

Q1.a What date were your first certified as a scuba diver?

Q1.A Cert. Date	Certified Count	Q1.A Percent	Western Region Count	Western Region Col %	Midwestern Region Count	Midwestern Region Col %	Eastern Region Count	Eastern Region Col %
1 Year or Less	1	1.4			1	6.3		
1.1 to 3 Years	1	1.4	1	7.7				
3.1 to 5 Years	8	11.3		0.0	4	25.0	4	16.7
5.1 to 8 Years	48	67.6	11	84.6	2	12.5	17	70.8
8.1 to 11 Years	6	8.5			4	25.0	2	8.3
11.1 to 15 Years	3	4.2			2	12.5	1	4.2
15.1 Years or More	4	5.6	1	7.7	3	18.8		
Total	71	100.0	13	100.0	16	100.0	24	100.0

	Certified	Western Region	Midwestern Region	Eastern Region
Mean	7.1	6.8	7.9	6.1
Median	5.5			
Mode	5.2			

Conclusions The average diver surveyed form this 'certified' sample had been certified roughly 7 years ago. This number is important, as it shows a good cross-section of divers that have been certified for several years, but does not necessarily reflect active divers. Interestingly, the average certified years is largest in the Midwest, and lowest in the eastern region.

Q1.b What was the date of your last scuba dive?

Q1.B Date of Last Dive	Certified Count	Q1.B Percent	Western Region Count	Western Region Col %	Midwestern Region Count	Midwestern Region Col %	Eastern Region Count	Eastern Region Col %
1 Year or Less	45	62.5	8	66.7	17	48.6	20	80.0
1.1 to 2 Years	10	13.9	1	8.3	8	22.9	1	4.0
2.1 to 3 Years	5	6.9			3	8.6	2	8.0
3.1 to 4 Years	2	2.8			1	2.9	1	4.0
4.1 to 5 Years	3	4.2	1	8.3	2	5.7		
5.1 to 6 Years	6	8.3	1	8.3	4	11.4	1	4.0
7 Years or More	1	1.4	1	8.3				
Total	72	100.0	12	100.0	35	100.0	25	100.0

Mean	1.5	1.8	1.7	1.0
Median	0.6			
Mode	0.2			

Conclusions This question is to determine actual activity level. As indicated, 83% have participated in diving activities within the last three years. The most active divers appear to live in the eastern region, with the least active (by a narrow margin) living in the westerns region of the U.S.

Crosstabulations Based upon a Diver's Perceived Activity Level
Q1.b-1 Diver's Perceived Activity Level by Time Since Last Scuba Dive

Q1.B by Q1.C Time Since Last Dive	Inactive Count	Inactive Percent	Somewhat Active Count	Somewhat Active Percent	Active Count	Active Percent	Very Active Count	Very Active Percent	Overall Count	Overall Percent
1 Year or Less	2	8.7	14.0	73.7	20.0	95.2	9.0	100.0	45.0	62.5
1.1 to 2 Years	6	26.1	3.0	15.8	1.0	4.8			10.0	13.9
2.1 to 3 Years	4	17.4	1.0	5.3					5.0	6.9
3.1 to 4 Years	2	8.7							2.0	2.8
4.1 to 5 Years	2	8.7	1.0	5.3					3.0	4.2
5.1 to 6 Years	6	26.1							6.0	8.3
7 Years or More	1	4.3							1.0	1.4
Total	23	100.0	19	100.0	21	100.0	9	100.0	72	100.0

Q1.B by Q1.C Time Since Last Dive	Certified Count	Percent	Time in Years	Time in Months
Inactive	25	33.3	3.4	40.2
Somewhat Active	20	26.7	0.9	11.0
Active	21	28.0	0.4	4.7
Very Active	9	12.0	0.2	2.4
Total/Average	75	100.0	1.2	14.6

Conclusions This table represents the first time a diver's perceived activity level has actually been compared to their real dive activity. As indicated, the inactive diver has not made a dive, on average, for almost 3 1/2 years, the somewhat active for slightly over one year, the active within the last 5 months and very active within the last 3 months. It is interesting to note that the somewhat active diver has been diving as recent as a year ago, yet they still consider themselves somewhat active.

Q1.c How would you classify your current diving status?

Q1.C Certified Diving Status	Q1.C Count	Q1.C Percent	Western Region Count	Western Region Col %	Midwestern Region Count	Midwestern Region Col %	Eastern Region Count	Eastern Region Col %
Inactive	25	33.3	6	46.2	14	38.9	5	19.2
Somewhat Active	20	26.7	2	15.4	11	30.6	7	26.9
Active	21	28.0	4	30.8	7	19.4	10	38.5
Very Active	9	12.0	1	7.7	4	11.1	4	15.4
Total	75	100.0	13	100.0	36	100.0	26	100.0

Conclusions As illustrated, nearly 62% of the respondents indicated that they felt they were inactive or somewhat active. This is a very interesting question and response, given the nature of the sample. Additionally, in the previous question, over 80% responded that they had dove in the last three years, yet in this questions, over 60% feel they are inactive or somewhat active. This question deals with a diver's perception of their diver activity level, an important psychological consideration in marketing to inactive or somewhat active divers. Based on this question, several of the questions in this study are crosstabluated for further analysis.

Q1.d If your diver status in "inactive", do you plan to become somewhat active or active again in the future?

Q1.D Certified Become Active?	Q1.D Count	Q1.D Percent
Yes	25	96.2
No	1	3.8
Total	26	100.0

Conclusions It is interesting to note that 96% of the respondents that responded to the previous question of feeling inactive, plan to become more active in diving in the future.

Crosstabulations Based upon a Diver's Perceived Activity Level
Q1.c-1 Diver's Perceived Activity Level by Years Actively Scuba Diving

QG1.3 by QG1.C		Inactive	Somewhat Active			Active		Very Active		Overall
Years Act. Diving	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
0 Years	1	4.2		0.0		0.0		0.0	1	1.4
3 Years or Less	13	54.2	1	5.0		0.0		0.0	14	18.9
4 to 7 Years	7	29.2	13	65.0	17	81.0	7	77.8	44	59.5
8 to 15 Years	3	12.5	5	25.0	3	14.3	1	11.1	12	16.2
16 Years or More		0.0	1	5.0	1	4.8	1	11.1	3	4.1
Total	24	100.0	20	100.0	21	100.0	9	100.0	74	100.0
Mean/Percent of Total	32.4	4.4	27.0	7.8	28.4	7.6	12.2	7.9	74.0	13.6

QG1.3 by Q1.C Years Act. Diving	Certified Count	Percent	Average Years
Inactive	25	33.3	4.4
Somewhat Active	20	26.7	7.8
Active	21	28.0	7.6
Very Active	9	12.0	7.9
Total/Average	75	100.0	6.6

Conclusions There is a clear relationship between the time a diver has been certified and their perceived activity level. As indicated, the less active a diver feels they are, the less number of years they have been actively diving. It is interesting to note that over half (54%) of those that identified themselves as inactive, have been actively diving for 3 years or less.

Q1.c-2 Diver's Perceived Activity Level by Total Number of Dives Completed to Date

Q1.4 by Q1.C	Inactive		Somewhat Active		Active		Very Active		Overall	
Dives to Date	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
0 Dives	1	4.0							1	1.3
10 Dives or Less	11	44.0	1	5.0	1	4.8			13	17.3
11 to 21 Dives	4	16.0	2	10.0					6	8.0
21 to 30 Dives	1	4.0	1	5.0			1	11.1	3	4.0
31 to 40 Dives	1	4.0	1	5.0	1	4.8			3	4.0
41 to 60 Dives			3	15.0	1	4.8			4	5.3
61 to 80 Dives	2	8.0	4	20.0	2	9.5			8	10.7
81 to 100 Dives	1	4.0	5	25.0	3	14.3			9	12.0
101 to 150 Dives	3	12.0	2	10.0	5	23.8	1	11.1	11	14.7
151 to 200 Dives	1	4.0	1	5.0	4	19.0	1	11.1	7	9.3
201 or More Dives					4	19.0	6	66.7	10	13.3
Totals	25	100.0	20	100.0	21	100.0	9	100.0	75	100.0
Mean/Percent of Total	3.2	33.3	5.6	26.7	7.6	28.0	8.9	12.0	5.7	100.0

QG 1.4 by Q1.C Dives to Date	Certified Count	Percent	Dives Average
Inactive	25	33.3	40
Somewhat Active	20	26.7	74
Active	21	28.0	258
Very Active	9	12.0	412
Total/Average	75	100.0	

Conclusions This table shows that there is a clear relationship between the number of dive completed and a diver's perceived activity levels. As evident in the second chart, the less active a diver feels they are, the fewer total dives they have completed. It is also interesting to note that even an inactive diver, has actually, on average, made at least 40 dives.

Q1.c-3 Diver's Perceived Activity Level by Average Number of Dives Completed Within the Last 12 Months

QG 1.5 by QG 1.C	Inactive		Somewhat Active		Active		Very Active	
# of Dives	Count	Percent	Count	Percent	Count	Percent	Count	Percent
0 Dives	21	84.0	4	20.0				
5 Dives or Less	3	12.0	9	45.0	4	19.0		
6 to 10 Dives			2	10.0	4	19.0	1	11.1
11 to 20 Dives			5	25.0	5	23.8		
21 to 30 Dives	1	4.0			6	28.6		
31 Dives or More					2	9.5	8	88.9
Total	25	100.0	20	100.0	21	100.0	9	100.0
Mean/Percent of Total	1.5	33.3	6.2	26.7	23.0	28.0	56.3	12.0

QG 1.5 by Q1.C Dives in Lst 12 Mo	Certified Count	Percent	Average Dives
Inactive	25	33.3	1.5
Somewhat Active	20	26.7	6.2
Active	21	28.0	23.0
Very Active	9	12.0	56.3
Total/Average	75	100.0	

Conclusions This response indicates actual diving activities by the various perceived active groups. As indicated, 84% of the inactive group made no dive within the last 12 months of this survey, yet 16% actually made 5 or more dives. This would seem to indicate that a person considers themselves inactive if they don't dive within 12 months, a condition that in itself, does not qualify them as active.

Q1.c-4 Diver's Perceived Activity Level by Number of Dive Vacations Taken Last Year

Q1.6 by Q1.C Trips Last Yr.	Inactive Count	Inactive Percent	Somewhat Active Count	Somewhat Active Percent	Active Count	Active Percent	Very Active Count	Very Active Percent	Overall Count	Overall Percent
No Trips	21	84.0	13	65.0	9	47.4	2	22.2	45	61.6
1	2	8.0	6	30.0	4	21.1	2	22.2	14	19.2
2			1	5.0	5	26.3	4	44.4	10	13.7
3	1	4.0							1	1.4
4					1	5.3			1	1.4
6	1	4.0							1	1.4
8							1	11.1	1	1.4
Totals	25	100.0	20	100.0	19	100.0	9	100.0	73	100.0
Mean/Percent of Total	0.4	34.2	0.4	27.4	0.8	26.0	2.0	12.3	0.7	100.0

QG1.6 by Q1.C Dive Vacat. Lst Yr	Certified Count	Percent	Average Per Year	Average for 3-Yrs
Inactive	25	33.3	0.4	1.3
Somewhat Active	20	26.7	0.4	1.2
Active	21	28.0	0.8	2.5
Very Active	9	12.0	2.0	6.0
Total/Average	75	100.0	0.7	2.8

Conclusions This question is an attempt to classify a divers perceived activity level by their actual dive travel activities. It is interesting to note, that again, 16% of the inactive group took vacations, yet they still consider themselves inactive. Also, a person only considered themselves active if they take a dive vacation each year (actually .8 times a year, or 2.5 times in three years). When the averages for each group are tabulated, even the inactive group still takes a dive vacation, on average, at least once in three years, a factor that would qualify them in the industry as active.

Q1.c-5 Diver's Perceived Activity Level by Amount Spent on Dive Vacations Last Year

Q1.7 by Q1.C Spent on Dive Trips	Inactive Count	Inactive Percent	Somewhat Active Count	Somewhat Active Percent	Active Count	Active Percent	Very Active Count	Very Active Percent	Overall Count	Overall Percent
0$	13	61.9	7	43.8	6	31.6	2	22.2	28	43.1
$500 or Less			1	6.3					1	1.5
$501 to $1,000	1	4.8	1	6.3			2	22.2	4	6.2
$1,001 to $1,500	1	4.8	1	6.3	2	10.5	1	11.1	5	7.7
$1,501 to $2,000	4	19.0	1	6.3	1	5.3			6	9.2
$2,001 to $2,500	1	4.8	2	12.5					3	4.6
$2,501 to $3,000			2	12.5	1	5.3	1	11.1	4	6.2
$3,001 or More	1	4.8	1	6.3	9	47.4	3	33.3	14	21.5
Totals	21	100.0	16	100.0	19	100.0	9	100.0	65	100.0
Mean/Percent of Total	$704	32.3	$1,110	24.6	$2,976	29.2	$2,366	13.8	$1,648	100.0

QG1.7 by Q1.C $ Spent on Dive Vac.	Certified Count	Percent	$ Spent Vacat.
Inactive	25	33.3	$704
Somewhat Active	20	26.7	$1,110
Active	21	28.0	$2,976
Very Active	9	12.0	$2,366
Total/Average	75	100.0	$1,648

Conclusions This table reflects the travel activity shown in the previous tables, but that 38% of the inactive group actually spent over $500 dollars on dive vacation activities. Clearly, the inactive and active group still take some dive vacations, although not at the same level as the active or above, yet still spend significant amounts on dive vacation activities.

Q1.c-6 Diver's Perceived Activity Level by Amount Spent on Dive Equipment to Date

QG2.1 by Q1.C	**Inactive**		**Somewhat Active**		**Active**		**Very Active**		**Overall**	
$ Spent on Dive Equip	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
$500 or Less	14	56.0	3	15.0	4	19.0	1	11.1	22	29.3
$501 to $1,000	3	12.0	3	15.0	1	4.8	2	22.2	9	12.0
$1,001 to $1,500	2	8.0	3	15.0	1	4.8			6	8.0
$1,501 to $2,000	3	12.0	5	25.0	3	14.3	1	11.1	12	16.0
$2,001 to $2,500			1	5.0	2	9.5	1	11.1	4	5.3
$2,501 to $3,000	1	4.0	1	5.0	5	23.8	2	22.2	9	12.0
$3,001 to $3,500	1	4.0	2	10.0					3	4.0
$3,501 to $4,000	1	4.0			1	4.8	1	11.1	3	4.0
$4,001 or More			2	10.0	4	19.0	1	11.1	7	9.3
Totals	25	100.0	20	100.0	21	100.0	9	100.0	75	100.0
Mean/Percent of Total	$982	33.3	$1,990	26.7	$2,821	28.0	$2,422	12.0	$1,939	100.0

QG2.1 by Q1.C	Certified		**$ Spent**
$ Spent on Dive Equip	Count	Percent	**Equip.**
Inactive	25	33.3	$982
Somewhat Active	20	26.7	$1,990
Active	21	28.0	$2,821
Very Active	9	12.0	$2,422
Total/Average	75	100.0	$1,939

Conclusions These tables appears to show relationship between the amount spent on dive equipment and perceived activity level. 56% of the inactive group indicated they spent $500 or less on dive equipment, whereas that percentage in the other groups is lower as the perceived activity level rises (15% for somewhat active, 19% for active and 11% for very active).

Q1.c-7 Diver's Perceived Activity Level by Date of Last Dive Equipment Purchase of $100 or More

Q2.3 by Q1.C		Inactive	Somewhat Active			Active	Very Active			Overall
Date Last Purchase	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Less Than 1 Year	7	29.2	6	31.6	9	45.0	2	28.6	24	34.3
1.1 to 2 Years			3	15.8	5	25.0	2	28.6	10	14.3
2.1 to 3 Years	2	8.3			5	25.0			7	10.0
3.1 to 4 Years	5	20.8	1	5.3	1	5.0			7	10.0
4.1 to 5 Years	2	8.3	5	26.3			1	14.3	8	11.4
5.1 Years or More	8	33.3	4	21.1			2	28.6	14	20.0
Total	24	100.0	19	100.0	20	100.0	7	100.0	70	100.0

Q2.3 by Q1.C	Certified		**Time in**
Date Last Purchase	Count	Percent	**Years**
Inactive	25	33.3	3.2
Somewhat Active	20	26.7	7.4
Active	21	28.0	1.3
Very Active	9	12.0	2.3
Total/Average	75	100.0	3.7

Conclusions As displayed, almost 30% of those that responded as being inactive, actually spent $100 or more on dive equipment within the last 12 months. However, the averages indicate that 60% of the certified group had not purchased any dive equipment for at least 3 years. Interestingly, it appears the active group is the most recent to purchase dive gear, as they purchased within the last 1.3 years.

Q1.c-8 Diver’s Perceived Activity Level by Direct-Mail Purchases

QG2.8 by QG2.1	Inactive		Somewhat Active		Active		Very Active		Overall	
Direct-Mail Purchases	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Yes	4	16.0	4	20.0	8	40.0	3	33.3	19	25.7
No	21	84.0	16	80.0	12	60.0	6	66.7	55	74.3
Total	25	100.0	20	100.0	20	100.0	9	100.0	74	100.0

Conclusions This analysis indicates that the largest percentage of direct-mail purchases appear the be the active diver group, even more than the very active group.

Q1.c-9 Diver’s Perceived Activity Level by Respondent’s Gender

Q3.1 by Q1.C	Inactive		Somewhat Active		Active		Very Active		Overall	
Gender	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Male	16	64.0	15	75.0	17	81.0	9	100.0	57	76.0
Female	9	36.0	5	25.0	4	19.0	0	0.0	18	24.0
Total	25	100.0	20	100.0	21	100.0	9	100.0	75	100.0

Conclusions Without question, we see a drop off in the female diver population as the perceived activity level increases. As indicated, the female group goes from 36% in the inactive group to very little in the very active group. Note: due to the small sample, female divers were not recorded in the very active group. They obviously exist, just the percentage is smaller than the active group. This table presents a clear problem in female diver dropout in the industry, as illustrated by the shrinking female group in each perceived activity classification.

Q1.c-10 Diver’s Perceived Activity Level by Respondent’s Age

Q3.2 by Q1.C	Inactive		Somewhat Active		Active		Very Active		Overall	
Age	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
18 Years or Younger	1	4.0	0	0.0	1	5.3	1	11.1	3	4.2
19 to 24	6	24.0	3	15.8	1	5.3	0	0.0	10	13.9
25 to 29	3	12.0	3	15.8	3	15.8	1	11.1	10	13.9
30 to 34	5	20.0	2	10.5	4	21.1	1	11.1	12	16.7
35 to 39	2	8.0	5	26.3	2	10.5	1	11.1	10	13.9
40 to 44	3	12.0	1	5.3	2	10.5	1	11.1	7	9.7
45 to 49	1	4.0	3	15.8	3	15.8	2	22.2	9	12.5
50 to 55	4	16.0	2	10.5	3	15.8	2	22.2	11	15.3
Total	25	100.0	19	100.0	19	100.0	9	100.0	72	100.0
Mean/Percent of Total	34.7	34.0	26.4	36.3	26.4	38.7	12.5	39.7	100.0	36.6

QG3.2 by Q1.C Age	Certified Count	Percent	Average Age
Inactive	25	33.3	34.0
Somewhat Active	20	26.7	36.3
Active	21	28.0	38.7
Very Active	9	12.0	39.7
Total/Average	75	100.0	36.6

Conclusions This analysis also points to the fact that the younger divers are dropping out faster than the older divers, as indicated by the raising median age for each perceived group. The 30 year old and younger groups go from 40% at the inactive stage, to 32% at the somewhat active stage, to 26% at the active stage, and finally to 22% at the very active stage. This points to a clear pattern of the industry loosing the younger divers. As a note, some of this dropout bay be attributed to normal demographic patterns at these various age levels, i.e. family, careers, income, etc. However, regardless of why the inactivity, at one time they were active, if only for the initial certification class.

Q1.c-11 Diver's Perceived Activity Level by Respondent's Profession

Q3.6 by Q1.C	Inactive		Somewhat Active		Active		Very Active		Overall	
Profession	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Professional	4	16.0	5	26.3	6	28.6	2	22.2	17	23.0
Medical	3	12.0			1	4.8	1	11.1	5	6.8
Technical	3	12.0	2	10.5	2	9.5	1	11.1	8	10.8
Administrative	2	8.0	2	10.5	1	4.8	1	11.1	6	8.1
Government	2	8.0	2	10.5	2	9.5	3	33.3	9	12.2
Laborer	2	8.0	5	26.3	2	9.5			9	12.2
Student	6	24.0	1	5.3	4	19.0			11	14.9
Creative Professions	3	12.0	2	10.5	2	9.5			7	9.5
Diving Professions					1	4.8	1	11.1	2	2.7
Total	25	100.0	19	100.0	21	100.0	9	100.0	74	100.0

Conclusions The most interesting profession to watch in this analysis is the student line. The student group starts out at the 24% mark for inactive, and drops some at the active stage, then to nothing at the very active group, indicating that perhaps a students are certified then no longer continue to participate.

Q1.c-12 Diver's Perceived Activity Level by Respondent's Household Income

QG3.7 by Q1.C Income	Certified Count	Percent	Average Income
Inactive	25	33.3	$56,720
Somewhat Active	20	26.7	$36,209
Active	21	28.0	$67,238
Very Active	9	12.0	$73,778
Total/Average	75	100.0	$56,242

Conclusions Interestingly, the inactivity issue appears to have little to do with household income, as the inactive group is actually higher than the somewhat active group.

Q1.c-13 Diver's Perceived Activity Level by Respondent's

Residency

Q3.8 by Q1.C Region	Count	Inactive Percent	Somewhat Active Count	Percent	Count	Active Percent	Very Active Count	Percent	Count	Overall Percent
Midwestern Region	6	24.0	2	10.0	4	19.0	1	11.1	13	17.3
Eastern Region	14	56.0	11	55.0	7	33.3	4	44.4	36	48.0
Western Region	5	20.0	7	35.0	10	47.6	4	44.4	26	34.7
Total	25	100.0	20	100.0	21	100.0	9	100.0	75	100.0

Conclusions It appears that the largest percentage of inactive divers live in the eastern regions of the U.S., as this regions represents over 50% of the inactive and somewhat inactive groups. However, given the error rates and small sampling, there is little deviation from the overall averages for each region.

Q1.e How many dives do you plan to make in the next 12 months?

Q1.E Dives Planned	Certified Count	Percent	Western Region Count	Col %	Midwestern Region Count	Col %	Eastern Region Count	Col %
0 Dives	9	11.8	3	23.1	5	13.9	1	3.8
5 Dives or Less	24	31.6	3	23.1	15	41.7	6	23.1
6 to 10 Dives	10	13.2	1	7.7	4	11.1	5	19.2
11 to 20 Dives	14	18.4	3	23.1	6	16.7	5	19.2
21 to 30 Dives	9	11.8	1	7.7	2	5.6	6	23.1
31 Dives or More	9	11.8	2	15.4	4	11.1	3	11.5
Total	76	100.0	13	100.0	36	100.0	26	100.0
Mean	14.1		13.3		10.9		18.8	

Conclusions As indicated, nearly 90% of the group plan to make a dive in the next 12 months.

Crosstabulations Based upon a Diver's Perceived Activity Level
Q1.e-1 Diver's Perceived Activity Level by Planned Number of Dives to Make in Next 12 Months

Q1.E by Q1.C Dives Planned	Count	Inactive Percent	Somewhat Active Count	Percent	Count	Active Percent	Very Active Count	Percent	Count	Overall Percent
0 Dives	8	32.0	1	5.0					9	12.0
5 Dives or Less	13	52.0	7	35.0	2	9.5	2	22.2	24	32.0
6 to 10 Dives	3	12.0	6	30.0	1	4.8			10	13.3
11 to 20 Dives	1	4.0	5	25.0	8	38.1			14	18.7
21 to 30 Dives			1	5.0	7	33.3	1	11.1	9	12.0
31 Dives or More					3	14.3	6	66.7	9	12.0
Total	25	100.0	20	100.0	21	100.0	9	100.0	75	100.0

Q1.E by Q1.C Dives Planned	Certified Count	Percent	Average Dives
Inactive	25	33.3	2.5
Somewhat Active	20	26.7	8.1
Active	21	28.0	21.3
Very Active	9	12.0	42.4
Total	75	100.0	

Conclusions Interestingly, 68% of the inactive group plan to make at least one dive in the next 12 months. This may not reflect actual conditions, by a large percentage of inactive divers have a desires to dive again.

Q1.f When was the last time you went on a dive vacation out of the U.S.?

Q1.F Yrs Since Vacation.	Certified Count	Percent	Western Region Count	Col %	Midwestern Region Count	Col %	Eastern Region Count	Col %
1 Year or Less	43	57.3	7	53.8	19	52.8	17	65.4
1.1 to 3 Years	16	21.3			8	22.2	8	30.8
3.1 to 5 Years	8	10.7	3	23.1	5	13.9		
5.1 to 8 Years	7	9.3	2	15.4	4	11.1	1	3.8
8.1 Years or More	1	1.3	1	7.7				
Total	75	100.0	13	100	36	100	26	100
Mean	1.7		2.9		1.7		1.1	

Conclusions As indicated, the average diver went on a dive vacation slightly over 1 1/2 years ago. The number of years climbs for the western regions to almost 3 years, and drops to slightly over 1 year for the eastern region. Clearly, the eastern region of the U.S. takes more dive vacations that the Midwest and west.

Crosstabulations Based upon a Diver's Perceived Activity Level
Q1.f-1 Diver's Perceived Activity Level by Years Since Last Dive Vacation

QG1.F by Q1.C Yrs Since Vacation.	Inactive Count	Percent	Somewhat Active Count	Percent	Active Count	Percent	Very Active Count	Percent	Overall Count	Percent
1 Year or Less	13	52.0	11	55.0	14	66.7	5	55.6	43	57.3
1.1 to 3 Years	4	16.0	6	30.0	4	19.0	2	22.2	16	21.3
3.1 to 5 Years	3	12.0	2	10.0	3	14.3	0	0.0	8	10.7
5.1 to 8 Years	5	20.0	1	5.0	0	0.0	1	11.1	7	9.3
8.1 Years or More	0	0.0	0	0.0	0	0.0	1	11.1	1	1.3
Totals	25	100.0	20	100.0	21	100.0	9	100.0	75	100.0
Mean/Percent of Total	2.0	33.3	1.5	26.7	1.1	28.0	2.9	12.0	1.7	100.0

QG1.F by Q1.C Years Since Last Vac	Certified Count	Percent	Average Years
Inactive	25	33.3	2.0
Somewhat Active	20	26.7	1.5
Active	21	28.0	1.1
Very Active	9	12.0	2.9
Total	75	100.0	

Conclusions This table indicates that 68% of inactive divers, still took a dive vacation once within the last three years. The average times generally declines for each perceived group, with the exception of a 'spike' in the data for the very active group. This spike may indicate a large response, but due to the small sample responding to as very active, large variations are possible in the data. However, if the 3 year point is where a diver is considered inactive, then 32% of the inactive group, 15% of the somewhat active group, 14% of the active group and 22% of the very active group are actually inactive from a dive travel standpoint.

Q1.g Where did you go on your last dive vacation out of the

U.S.?

Q1.G Where Vacation	Certified Count	Percent	$ Spent On Vac.
Bahamas	9	16.7	$1,767
Cozumel	8	14.8	$1,788
Bonaire	5	9.3	$3,300
Mexico	4	7.4	$3,425
Caymans	4	7.4	$2,875
BVI	3	5.6	$3,333
Australia	3	5.6	$2,333
Baja	3	5.6	$1,125
Jamaica	2	3.7	$5,500
Turks & Caicos	2	3.7	$4,750
Caribbean Other	2	3.7	$1,000
Roatan	2	3.7	$650
Aruba	1	1.9	$3,000
Dominica	1	1.9	$2,700
St. Maarten	1	1.9	$1,300
Maui	1	1.9	
Puerto Rico	1	1.9	
Johnson Atoll	1	1.9	
Sir Lanka	1	1.9	
Total/Average	54	100.0	$2,196

Conclusions Due to the very small sample for this questions, only the top three two responses are accurate. All others are for exploratory purposes only. However, the averages for dive trip will remain accurate down to 4 responses. As indicated, the top destination was The Bahamas, in terms of number of dive vacations, but well below several other for average trip expenditure. It should also be noted that only one response separates the Bahamas and Cozumel, and there is another Mexico classification for unspecified locations in Mexico, so it is entirely possible that Cozumel is much higher than reported. It is interesting to note that both the Bahamas and Cozumel have a very similar dive trip expenditure level. However, Bonaire and Cayman are nearly twice the amount reported for the Bahamas or Cozumel.

Q1.h Which <u>single</u> publication (if any) is most influential in your decision to select a dive destination or resort for your dive vacations?

Q1.H Influen. Travel Pub	Certified Count	Percent	$ Spent On Vac.
Skin Diver	18	39.1	$1,822
Rodale's Scuba Diving	8	17.4	$1,813
Other	4	8.7	$1,150
Dive Training	3	6.5	$3,333
Scuba Times	3	6.5	$2,000
Dive Travel	2	4.3	$2,500
Discover Diving	2	4.3	$500
Undercurrent	1	2.2	$5,000
In Depth	1	2.2	$2,700
Travel Agent	1	2.2	$1,700
Ocean Realm	1	2.2	$1,200
Sport Diver	1	2.2	
FL Scuba News	1	2.2	
Total/Average	46	100.0	$1,837

Conclusions This question attempted to determine which publication was utilized for dive trip booking information. Again, due to the small sample sizes, only the top two responses are accurate, all others are for exploratory purposes only. As indicated, Skin Diver's readers spend more on dive travel with the certified group, than Scuba Diving.

However, Dive Training is rated very high for expenditure, although the sample is very low.

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X. Diving Equipment Brand Perceptions and Ratings Both groups were asked to rate nearly all dive equipment manufacturers over 11 different attributes, as indicated in Question 2.10. Each attribute is broken-down by two classifications:

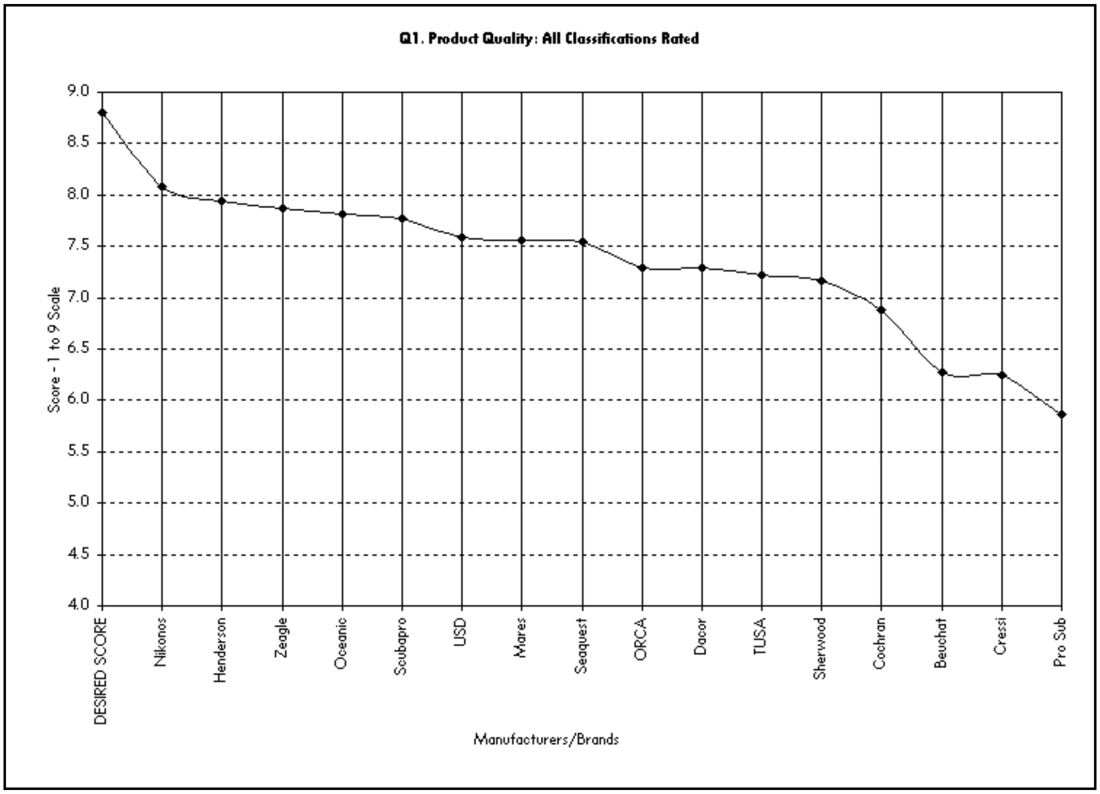
Soft Goods - identified to the respondents as: Masks, Fins, Snorkels, Wetsuits, Knives, Etc.

Hard Goods - identified to the respondents as: BCD's, Regulators, Gauges, Computers, Etc. Each attribute is rated for each manufacturer with the 'desired' score as reported by both groups in question 2.10, 'ideal attributes', indicating what consumers look for in terms of attributes when purchasing new dive equipment. This survey method is know as the Semantic Scale, resulting in highly accurate collection data from a limited sample. Data represented in the following charts and tables are highly accurate and representative of the indicate sample groups.

QM.1 Product Quality Rated

Q1 Quality Manufacturer	Hard Goods Certified	Active	Combined	Soft Goods Certified	Active	Combined	All Combined
Desired	8.7	8.9	8.8	8.7	8.9	8.8	8.8
Nikonos				8.1	8.1	8.1	8.1
Henderson				7.8	8.1	7.9	7.9
Zeagle	8.3	8.3	8.3	7.0	8.0	7.5	7.9
Oceanic	7.9	7.6	7.7	8.0	7.8	7.9	7.8
Scubapro	7.8	7.8	7.8	7.5	8.0	7.8	7.8
USD	7.4	7.5	7.4	7.7	7.8	7.8	7.6
Mares	7.2	7.7	7.4	7.7	7.7	7.7	7.6
Seaquest	7.3	7.9	7.6	7.2	7.8	7.5	7.5
ORCA				7.1	7.5	7.3	7.3
Dacor	7.0	7.4	7.2	7.4	7.4	7.4	7.3
TUSA	6.8	6.9	6.8	7.6	7.7	7.6	7.2
Sherwood	7.1	7.3	7.2	7.3	6.9	7.1	7.2
Cochran				6.8	7.0	6.9	6.9
Beuchat	6.2	6.2	6.2	5.6	7.1	6.4	6.3
Cressi	6.9	5.3	6.1	6.7	6.1	6.4	6.2
Pro Sub	6.0	6.2	6.1	5.0	6.3	5.6	5.9

Summary of All Classifications for the Previous Table is Illustrated as Follows:

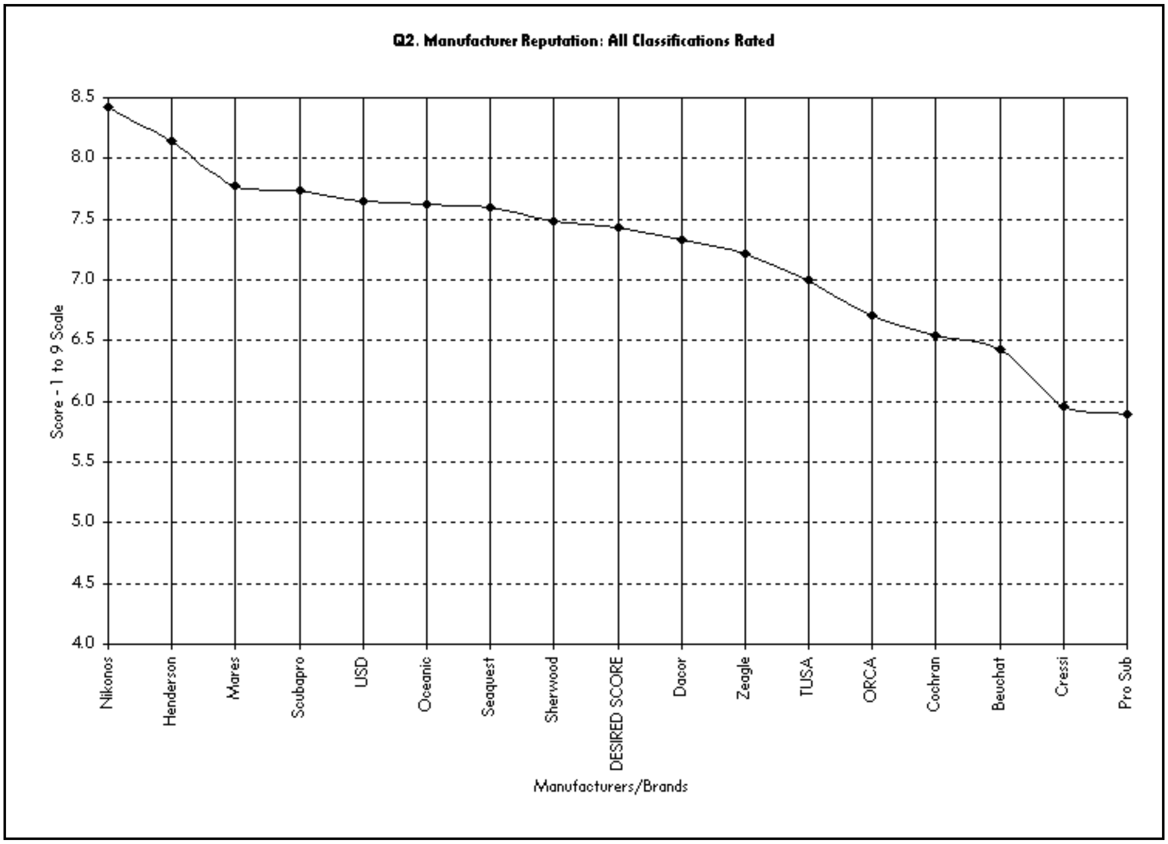


Conclusions As indicated in the previous chart, the desired score was higher than all other actual ratings for each manufacturer, with Nikonos, Henderson and Zeagle rating the closest to the target score. Again, the desired score was derived from Q2.10, what consumers look for in terms of attributes when purchasing new dive equipment.

QM.2 Manufacturer Reputation Rated

Q2 Reputation Manufacturer	Hard Goods Certified	Active	Combined	Soft Goods Certified	Active	Combined	All Combined
Nikonos				8.1	8.7	8.4	8.4
Henderson				7.8	8.5	8.1	8.1
Mares	7.2	8.2	7.7	7.9	7.8	7.8	7.8
Scubapro	7.7	7.8	7.7	7.5	8.0	7.8	7.7
USD	7.1	8.1	7.6	7.3	8.1	7.7	7.6
Oceanic	7.3	7.6	7.4	7.7	7.9	7.8	7.6
Seaquest	7.2	8.1	7.6	7.1	8.1	7.6	7.6
Sherwood	7.5	7.6	7.6	7.4	7.4	7.4	7.5
Desired	7.1	7.8	7.4	7.1	7.8	7.4	7.4
Dacor	7.3	7.4	7.3	7.4			7.3
Zeagle	8.0	8.1	8.1	5.0	7.8	6.4	7.2
TUSA	6.7	6.4	6.5	7.6	7.4	7.5	7.0
ORCA				6.3	7.2	6.7	6.7
Cochran				6.8	6.3	6.5	6.5
Beuchat	6.8	6.2	6.5	6.2	6.5	6.4	6.4
Cressi	6.0	5.3	5.7	6.2	6.3	6.3	6.0
Pro Sub	6.0	6.6	6.3	4.5	6.5	5.5	5.9

Summary of All Classifications for the Previous Table is Illustrated as Follows:

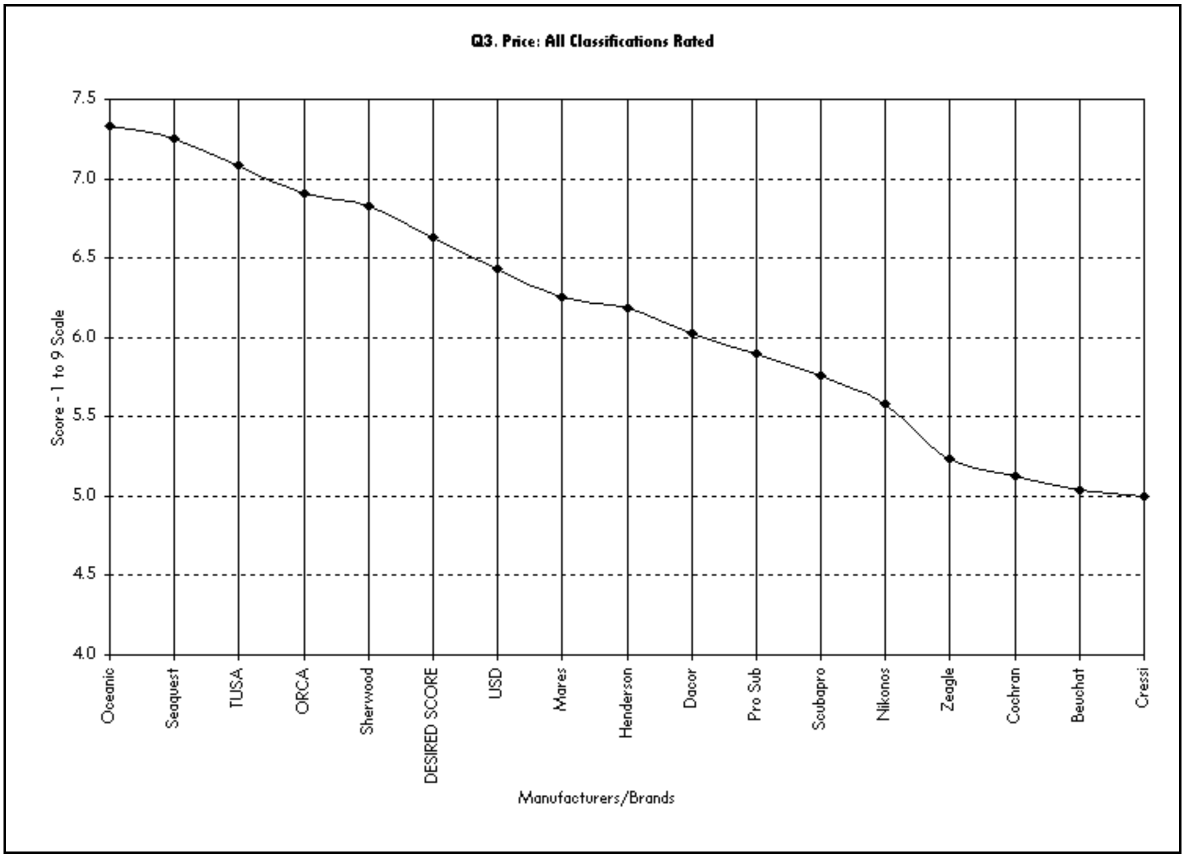


Conclusions When Manufacturer Reputation is compared, we see that several companies rank above the desired score. Namely Nikonos, Henderson, Mares, Scubapro, U.S. Divers and Oceanic.

QM.3 Product Price Rated

Q3 Price Manufacturer	Hard Goods Certified	Active	Combined	Soft Goods Certified	Active	Combined	All Combined
Oceanic	7.2	7.1	7.2	7.9	7.1	7.5	7.3
Seaquest	7.4	7.3	7.3	6.9	7.4	7.2	7.3
TUSA	7.1	6.5	6.8	7.5	7.2	7.4	7.1
ORCA				6.8	7.0	6.9	6.9
Sherwood	6.9	6.6	6.8	7.2	6.5	6.9	6.8
Desired	6.8	6.5	6.6	6.8	6.5	6.6	6.6
USD	6.2	6.2	6.2	6.8	6.6	6.7	6.4
Mares	6.6	5.6	6.1	6.9	5.9	6.4	6.3
Henderson				6.4	6.0	6.2	6.2
Dacor	5.5	6.3	5.9	5.7	6.5	6.1	6.0
Pro Sub	6.3	6.2	6.3	5.5	5.6	5.6	5.9
Scubapro	5.9	5.7	5.8	5.8	5.8	5.8	5.8
Nikonos				5.4	5.7	5.6	5.6
Zeagle	5.0	6.4	5.7	3.5	6.0	4.8	5.2
Cochran				5.3	5.0	5.1	5.1
Beuchat	5.0	4.2	4.6	5.6	5.4	5.5	5.0
Cressi	5.1	5.0	5.1	4.8	5.0	4.9	5.0

Summary of All Classifications for the Previous Table is Illustrated as Follows:

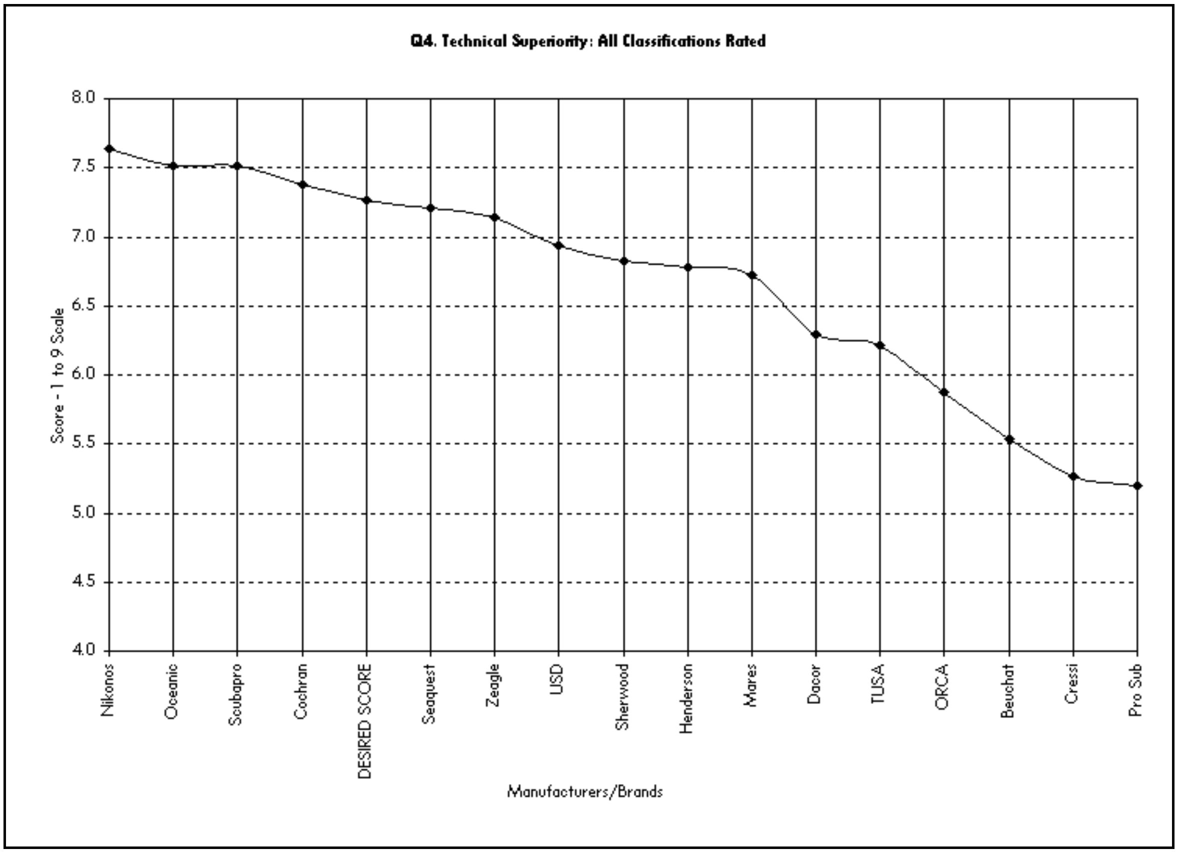


Conclusions Oceanic, Seaquest and TUSA are rated very high in terms of product pricing. The lowest rated are Cressi-Sub, Beuchat and Cochran.

QM.4 Technical Superiority Rated

Q4 Technical Manufacturer	Hard Goods Certified	Active	Combined	Soft Goods Certified	Active	Combined	All Combined
Nikonos				7.2	8.1	7.6	7.6
Oceanic	7.5	7.6	7.5	7.7	7.3	7.5	7.5
Scubapro	7.4	7.6	7.5	7.4	7.7	7.5	7.5
Cochran				6.8	8.0	7.4	7.4
Desired	7.1	7.4	7.3	7.1	7.4	7.3	7.3
Seaquest	7.5	7.9	7.7	7.0	6.4	6.7	7.2
Zeagle	8.3	7.7	8.0	5.0	7.5	6.3	7.1
USD	6.8	6.8	6.8	7.0	7.2	7.1	6.9
Sherwood	7.1	6.6	6.8	7.0	6.6	6.8	6.8
Henderson				6.7	6.8	6.8	6.8
Mares	6.8	6.5	6.6	6.9	6.7	6.8	6.7
Dacor	6.1	6.5	6.3	5.9	6.7	6.3	6.3
TUSA	6.1	5.4	5.8	7.1	6.2	6.7	6.2
ORCA				6.5	5.2	5.9	5.9
Beuchat	6.0	5.3	5.6	5.4	5.5	5.5	5.5
Cressi	5.1	5.3	5.2	5.7	5.0	5.3	5.3
Pro Sub	6.0	4.8	5.4	5.0	5.0	5.0	5.2

Summary of All Classifications for the Previous Table is Illustrated as Follows:

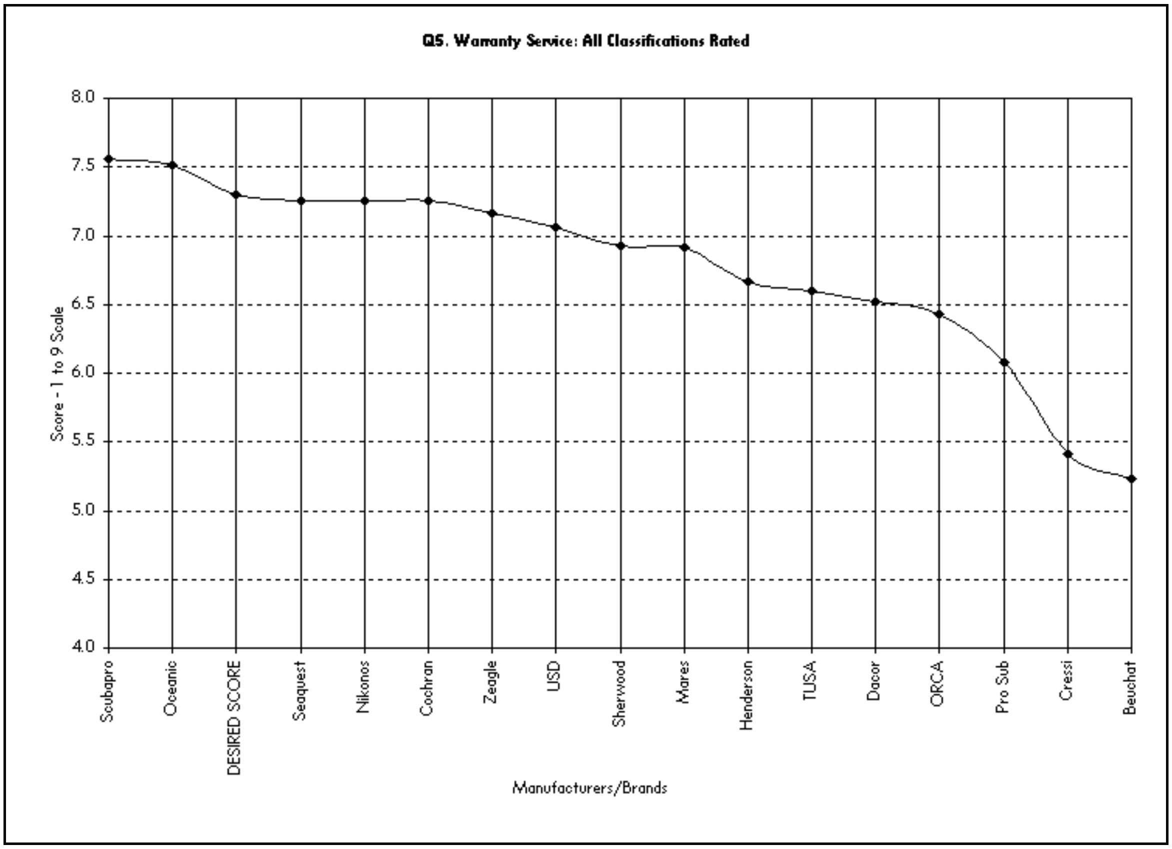


Conclusions When Technical Superiority is compared, we see that Nikonos, Oceanic and Scubapro are rated the highest, with Pro Sub, Cressi-Sub and Beuchat being rated the lowest.

QM.5 Product Warranty Rated

Q5 Warranty Manufacturer	Hard Goods Certified	Active	Combined	Soft Goods Certified	Active	Combined	All Combined
Scubapro	7.6	7.9	7.7	6.9	7.9	7.4	7.6
Oceanic	7.8	7.5	7.6	7.4	7.4	7.4	7.5
Desired	7.3	7.3	7.3	7.3	7.3	7.3	7.3
Seaquest	6.9	7.6	7.3	7.1	7.4	7.3	7.3
Nikonos				7.1	7.4	7.3	7.3
Cochran				6.0	8.5	7.3	7.3
Zeagle	7.3	8.0	7.7	6.0	7.3	6.7	7.2
USD	6.4	7.4	6.9	7.0	7.4	7.2	7.1
Sherwood	7.1	7.0	7.1	6.9	6.7	6.8	6.9
Mares	6.9	6.5	6.7	7.3	7.0	7.1	6.9
Henderson				6.6	6.7	6.7	6.7
TUSA	6.5	6.0	6.3	7.2	6.7	7.0	6.6
Dacor	6.0	6.9	6.5	6.2	7.0	6.6	6.5
ORCA				6.5	6.4	6.4	6.4
Pro Sub	6.3	6.7	6.5	5.0	6.3	5.7	6.1
Cressi	5.6	5.5	5.5	5.8	4.8	5.3	5.4
Beuchat	4.8	5.3	5.0	5.3	5.7	5.5	5.2

Summary of All Classifications for the Previous Table is Illustrated as Follows:

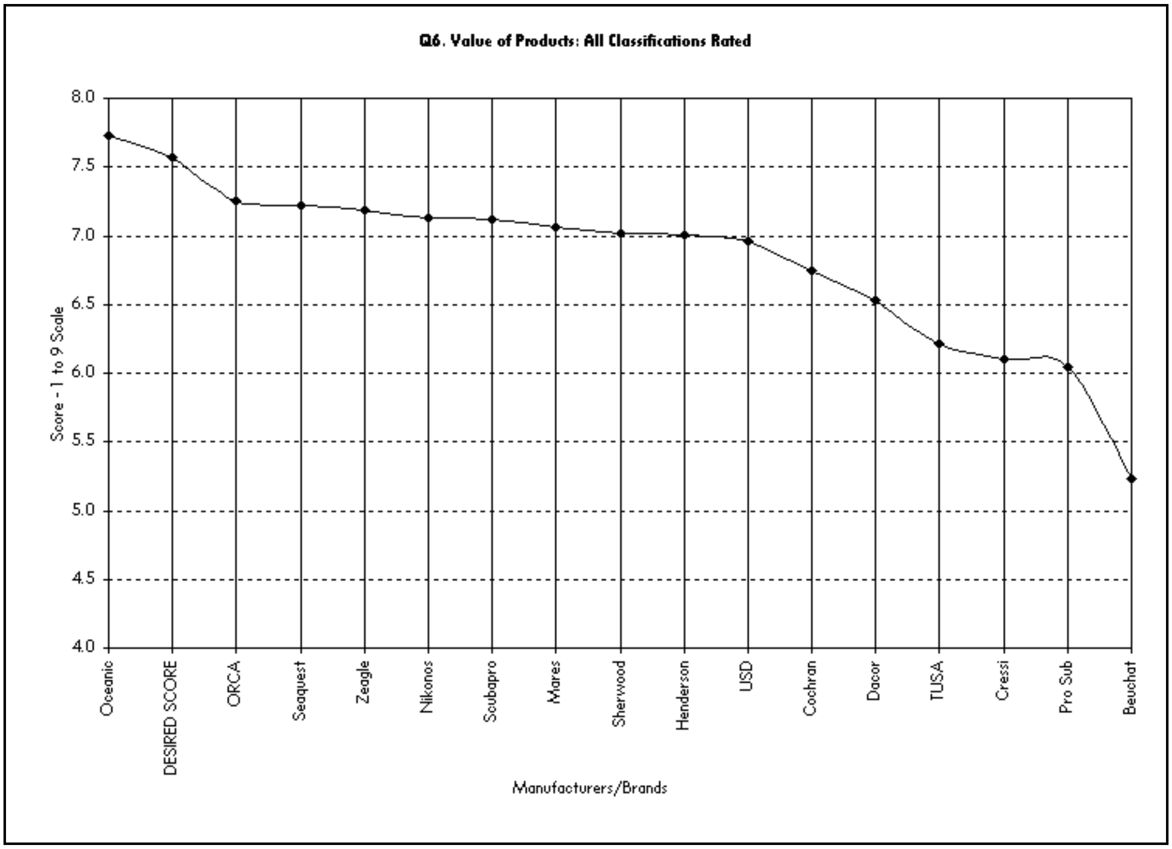


Conclusions Only Scubapro and Oceanic rate above the desired score for Warranty Service. However, two companies approach the midpoint of 5, Beuchat and Cressi-Sub.

QM.6 Value of Products Rated

Q6 Value Manufacturer	Hard Goods Certified	Active	Combined	Soft Goods Certified	Active	Combined	All Combined
Oceanic	7.8	7.8	7.8	7.7	7.7	7.7	7.7
Desired	7.3	7.8	7.6	7.3	7.8	7.6	7.6
ORCA				7.0	7.5	7.3	7.3
Seaquest	6.9	7.8	7.4	6.4	7.7	7.1	7.2
Zeagle	8.0	7.5	7.8	6.0	7.3	6.6	7.2
Nikonos				6.8	7.5	7.1	7.1
Scubapro	7.3	7.0	7.2	7.2	7.0	7.1	7.1
Mares	7.3	6.8	7.0	7.1	7.1	7.1	7.1
Sherwood	7.3	7.1	7.2	6.9	6.8	6.8	7.0
Henderson	6.5	7.1	6.8	7.4	7.1	7.2	7.0
USD	6.2	7.5	6.8	6.6	7.6	7.1	7.0
Cochran				6.5	7.0	6.8	6.8
Dacor				6.0	7.1	6.5	6.5
TUSA	5.9	5.3	5.6	7.0	6.7	6.8	6.2
Cressi	6.0	5.3	5.6	6.8	6.3	6.6	6.1
Pro Sub	6.3	6.0	6.2	5.5	6.3	5.9	6.0
Beuchat	4.8	4.8	4.8	5.0	6.3	5.7	5.2

Summary of All Classifications for the Previous Table is Illustrated as Follows:

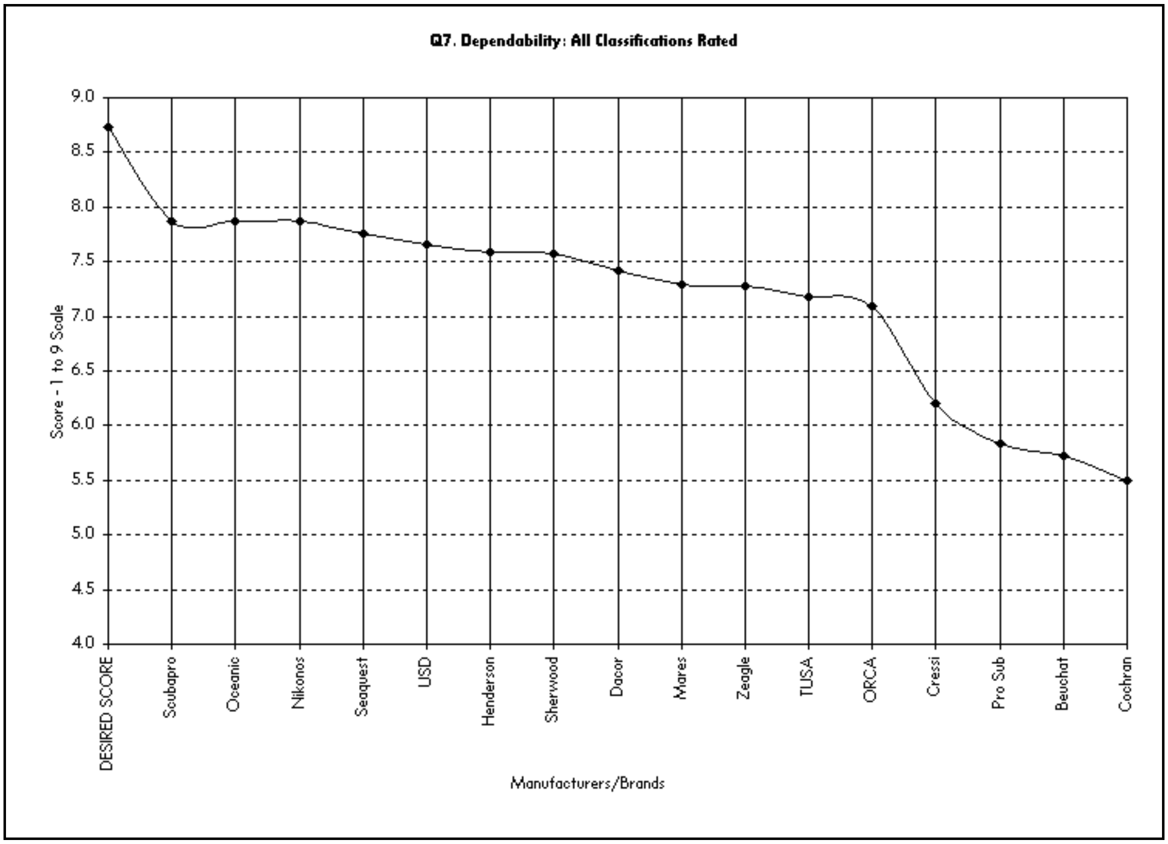


Conclusions For Value of Product, only Oceanic is above the desired score reported in Q2.10. However, there are several companies in the 7.0 and above range, with Beuchat dropping to near the 5.0 mark.

QM.7 Dependability of Products Rated

Q7 Dependability	Hard Goods			Soft Goods			All
Manufacturer	Certified	Active	Combined	Certified	Active	Combined	Combined
Desired	8.8	8.7	8.7	8.8	8.7	8.7	8.7
Scubapro	7.7	8.0	7.9	7.5	8.3	7.9	7.9
Oceanic	7.8	7.9	7.8	7.8	8.0	7.9	7.9
Nikonos				7.7	8.0	7.9	7.9
Seaquest	7.3	8.0	7.7	7.6	8.1	7.9	7.8
USD	7.5	7.5	7.5	7.9	7.8	7.8	7.7
Henderson				7.5	7.7	7.6	7.6
Sherwood	7.5	7.6	7.5	7.6	7.6	7.6	7.6
Dacor	7.1	7.5	7.3	7.4	7.7	7.6	7.4
Mares	7.0	7.3	7.1	7.7	7.2	7.4	7.3
Zeagle	8.0	8.1	8.1	5.0	8.0	6.5	7.3
TUSA	7.3	6.2	6.7	7.9	7.3	7.6	7.2
ORCA				7.2	7.0	7.1	7.1
Cressi	6.3	5.5	5.9	6.7	6.3	6.5	6.2
Pro Sub	6.3	6.0	6.2	5.0	6.0	5.5	5.8
Beuchat	5.8	4.8	5.3	6.0	6.3	6.2	5.7
Cochran				6.0	5.0	5.5	5.5

Summary of All Classifications for the Previous Table is Illustrated as Follows:

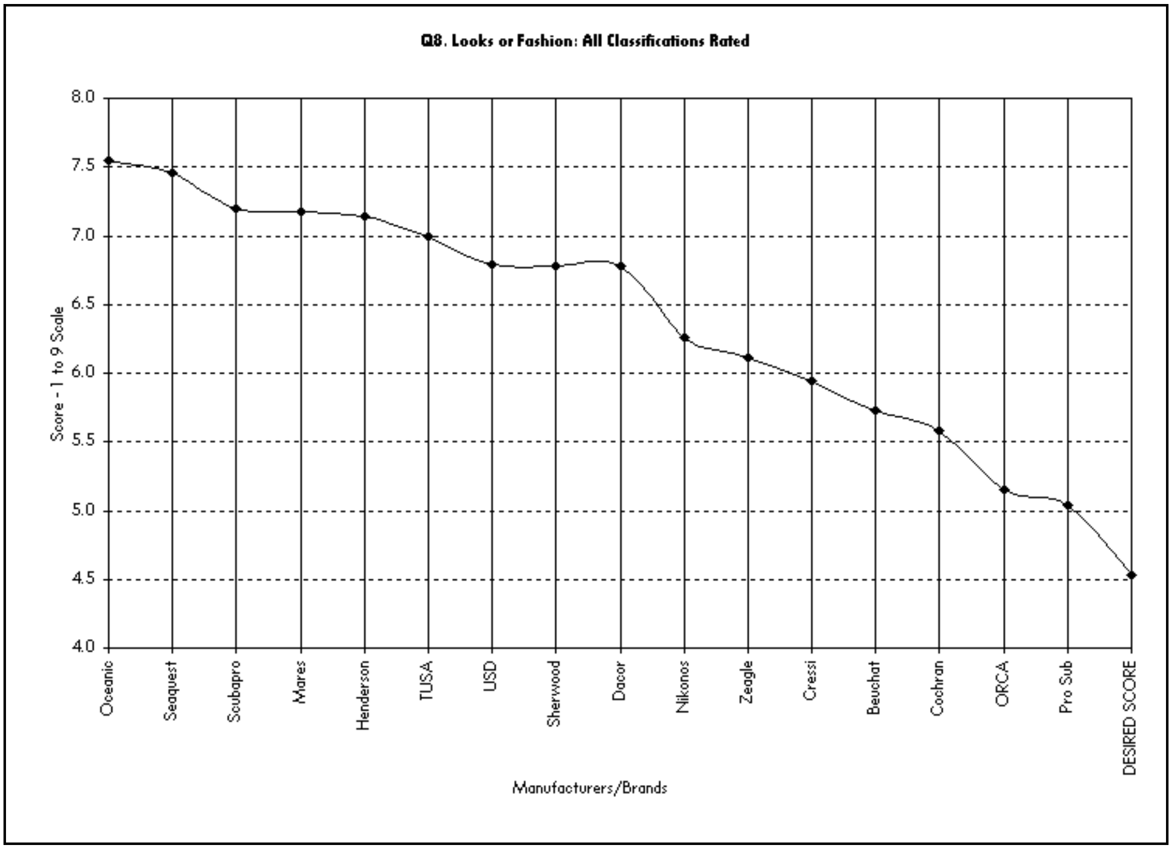


Conclusions When dependability is compared, no companies surpass the desired score, however, Scubapro, Oceanic and Nikonos are the closest. Lowest rated were Beuchat and Cochran.

QM.8 Looks or Fashion for Products Rated

Q8 Fashion Manufacturer	Hard Goods Certified	Active	Combined	Soft Goods Certified	Active	Combined	All Combined
Oceanic	7.4	7.3	7.3	8.2	7.4	7.8	7.6
Seaquest	7.2	7.9	7.6	6.9	7.8	7.3	7.5
Scubapro	6.6	7.8	7.2	6.5	7.9	7.2	7.2
Mares	6.9	7.3	7.1	7.3	7.3	7.3	7.2
Henderson				7.1	7.2	7.1	7.1
TUSA	7.2	5.8	6.5	7.8	7.1	7.5	7.0
USD	6.3	7.0	6.6	6.6	7.3	6.9	6.8
Sherwood	6.9	6.3	6.6	7.1	6.8	7.0	6.8
Dacor	6.5	6.9	6.7	6.9	6.8	6.9	6.8
Nikonos				6.4	6.2	6.3	6.3
Zeagle	6.0	6.7	6.4	5.0	6.8	5.9	6.1
Cressi	5.4	6.0	5.7	6.5	5.8	6.2	5.9
Beuchat	5.7	5.0	5.3	5.4	6.8	6.1	5.7
Cochran				4.7	6.5	5.6	5.6
ORCA				5.9	4.4	5.2	5.2
Pro Sub	5.0	5.7	5.3	4.5	5.0	4.8	5.0
Desired	4.5	4.6	4.5	4.5	4.6	4.5	4.5

Summary of All Classifications for the Previous Table is Illustrated as Follows:

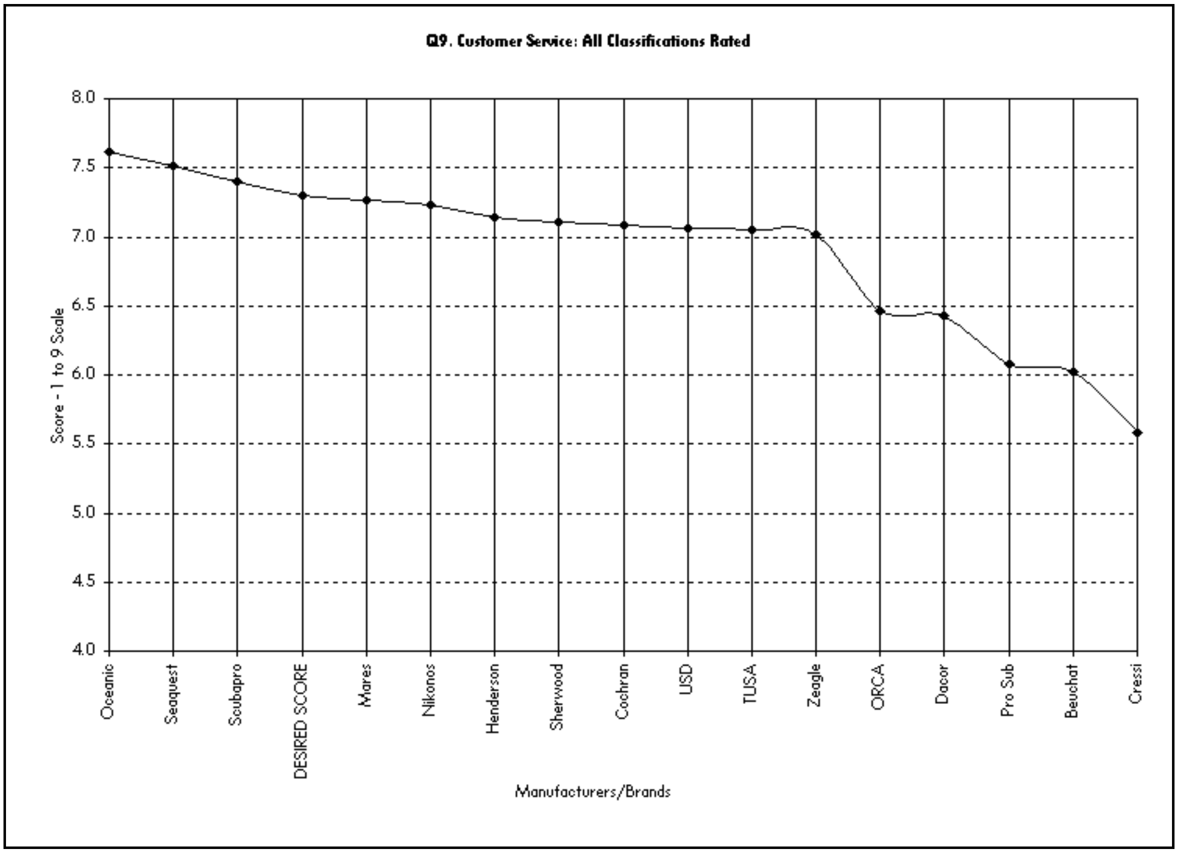


Conclusions With this attribute, all companies reviewed scored above the desired score. Highest rated for fashion were Oceanic and Seaquest. Lowest rated were Pro Sub and ORCA.

QM.9 Customer Service for Products Rated

Q9 Customer Srv.	Hard Goods			Soft Goods			All
Manufacturer	Certified	Active	Combined	Certified	Active	Combined	Combined
Oceanic	7.7	7.4	7.5	7.8	7.6	7.7	7.6
Seaquest	7.2	7.9	7.5	7.3	7.7	7.5	7.5
Scubapro	7.1	7.8	7.5	6.7	8.0	7.4	7.4
Desired	7.1	7.4	7.3	7.1	7.4	7.3	7.3
Mares	7.0	7.3	7.1	7.4	7.4	7.4	7.3
Nikonos				7.3	7.1	7.2	7.2
Henderson				7.2	7.1	7.1	7.1
Sherwood	7.3	6.9	7.1	7.5	6.8	7.1	7.1
Cochran				5.7	8.5	7.1	7.1
USD	6.7		6.7	6.9	7.7	7.3	7.1
TUSA	7.3	6.5	6.9	7.3	7.1	7.2	7.1
Zeagle	7.3	7.7	7.5	6.0	7.0	6.5	7.0
ORCA				6.3	6.6	6.5	6.5
Dacor	6.0	6.6	6.3	6.3	6.8	6.5	6.4
Pro Sub	6.0	6.7	6.3	5.0	6.7	5.8	6.1
Beuchat	6.3	5.5	5.9	6.5	5.8	6.2	6.0
Cressi	5.0	6.0	5.5	5.3	6.0	5.7	5.6

Summary of All Classifications for the Previous Table is Illustrated as Follows:

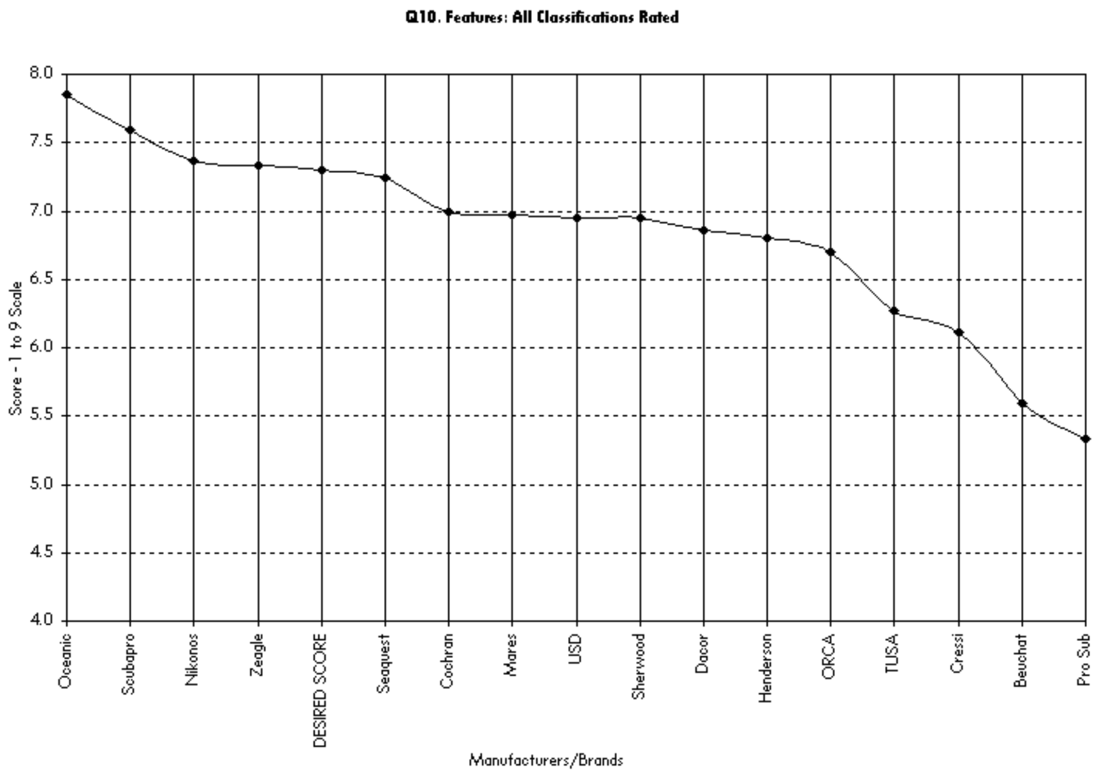


Conclusions Three companies were rated above the desired score for Customer Service; Oceanic, Seaquest and Scubapro. Cressi-Sub, Beuchat and Pro Sub scored the lowest overall.

QM.10 Features for Products Rated

Q10 Features	Hard Goods			Soft Goods			All
Manufacturer	Certified	Active	Combined	Certified	Active	Combined	Combined
Oceanic	7.9	7.6	7.8	8.2	7.7	7.9	7.9
Scubapro	7.5	7.8	7.7	7.2	7.8	7.5	7.6
Nikonos				7.0	7.7	7.4	7.4
Desired	7.2	7.4	7.3	7.2	7.4	7.3	7.3
Mares	7.0	6.8	6.9	7.1	7.0	7.1	7.0
Cochran				7.0	7.0	7.0	7.0
Seaquest	6.9	8.1	7.5	6.5	7.4	7.0	7.2
USD	6.4	7.5	7.0	6.4	7.5	6.9	6.9
Sherwood	7.3	6.7	7.0	6.8	6.9	6.9	6.9
TUSA	6.1	5.3	5.7	6.9	6.8	6.8	6.3
Henderson				7.0	6.6	6.8	6.8
Dacor	7.0	7.0	7.0	6.6	6.9	6.7	6.9
ORCA				6.9	6.5	6.7	6.7
Zeagle	8.3	8.0	8.2	5.0	8.0	6.5	7.3
Cressi	6.4	5.8	6.1	6.7	5.6	6.1	6.1
Beuchat	6.0	5.0	5.5	5.2	6.2	5.7	5.6
Pro Sub	5.7	5.5	5.6	4.5	5.7	5.1	5.3

Summary of All Classifications for the Previous Table is Illustrated as Follows:

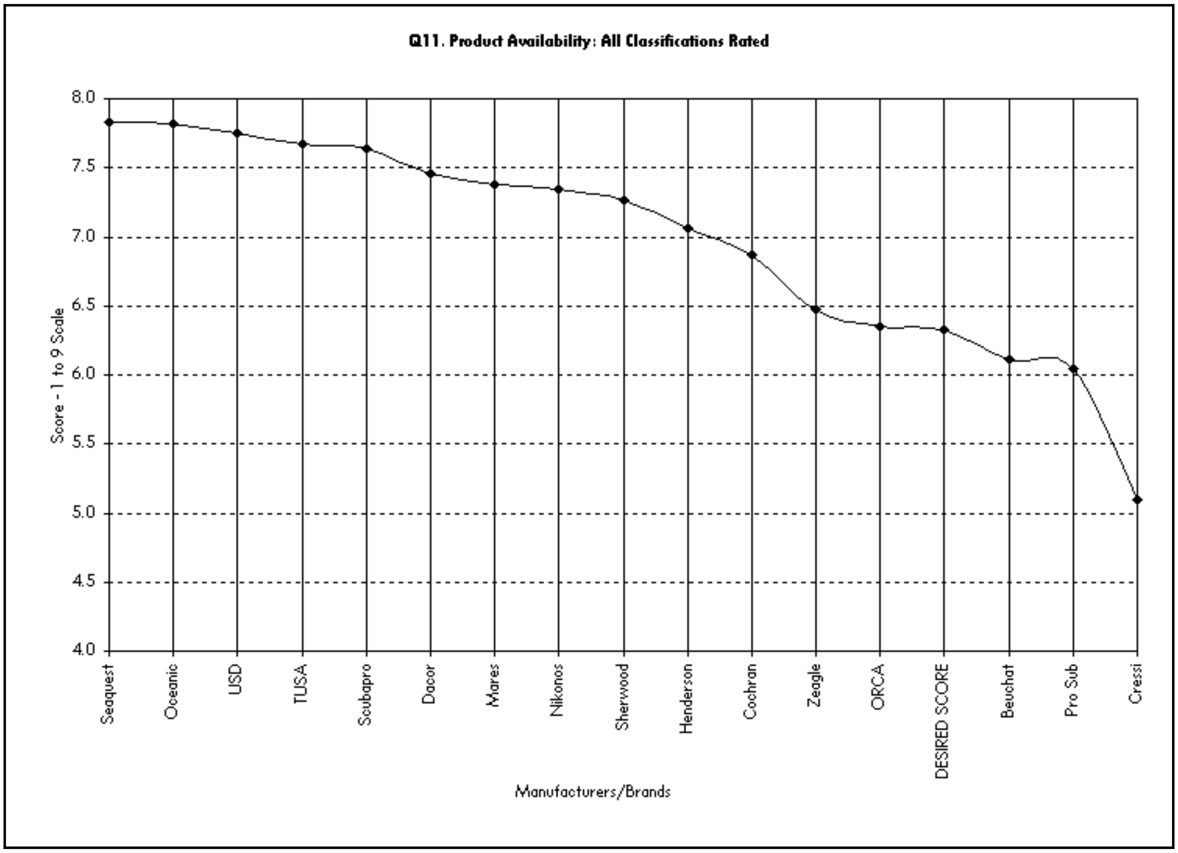


Conclusions For product features, four companies were rated above the desired score for this attribute; Oceanic, Scubapro, Nikonos and Zeagle. Only Beuchat and Pro Sub drop below or near the 5.5 mark.

QM.11 Product Availability Rated

Q11 Availability Manufacturer	Hard Goods Certified	Active	Combined	Soft Goods Certified	Active	Combined	All Combined
Seaquest	8.1	7.8	8.0	7.5	7.9	7.7	7.8
Oceanic	7.7	7.8	7.7	8.2	7.7	7.9	7.8
USD	7.4	8.0	7.7	7.5	8.1	7.8	7.7
TUSA	7.4	7.7	7.5	7.8	7.9	7.8	7.7
Scubapro	7.6	7.7	7.7	7.5	7.7	7.6	7.6
Dacor	6.8	7.6	7.2	7.5	7.9	7.7	7.5
Mares	7.3	7.3	7.3	7.3	7.7	7.5	7.4
Nikonos				7.4	7.3	7.3	7.3
Sherwood	7.2	7.4	7.3	7.6	6.9	7.2	7.3
Henderson				7.5	6.6	7.1	7.1
Cochran				5.8	8.0	6.9	6.9
Zeagle	7.7	6.7	7.2	5.0	6.5	5.8	6.5
ORCA				5.9	6.8	6.4	6.4
Desired	6.6	6.1	6.3	6.6	6.1	6.3	6.3
Beuchat	7.2	5.0	6.1	6.3	6.0	6.1	6.1
Pro Sub	5.7	7.0	6.3	4.5	7.0	5.8	6.0
Cressi	4.6	5.3	4.9	5.2	5.4	5.3	5.1

Summary of All Classifications for the Previous Table is Illustrated as Follows:



Conclusions In terms of Product Availability, the majority of all rated companies fall above the desired score. The leaders are Seaquest, Oceanic and U.S. Divers/ Lowest rated was Cressi-Sub near the 5 mark.

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XI. Consumer Profiles Section introduction Based upon the data collected in this study, it is possible to create a profile for various segments of the dive industry. These profiles can be used to determine the most 'profitable' consumer for each industry segment–manufacturing and dive travel. Based upon the data collected, following are several profiles. **Section A. Total Estimated Consumer Expenditures in U.S. Dive Retailers** This estimate is derived by multiplying the average gross income stated by retailers by the number of U.S. dive retailers. Total Estimated U.S. Retail Revenues: Gross Sales Reported in Q15 $457,925.93 Multiplied by the Estimated Number of Retailers 2,250.00

Total Retailer Sales $1,030,333,342.50 Notes: The number of dive retailers is derived from a count of all dive retailers listed in the Business Pages and consumer Yellow Pages of every city's phone book throughout the continental United States plus Alaska and Hawaii. Approximately 7% of all stores were removed, accounting for boat docks, general sporting good stores and other non-bonafide retailers. This list is known to be the most comprehensive dive retailer list available, as it relies on telephone book listings, rather than certification agency listings.

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XII. Appendix: Consumer Questionnaire U.S. Retailer Questionnaire - Telephone Script

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XIII. Cline Group Corporate Profile & Client List
CLINE GROUP is a Dallas, Texas based corporation specializing in market research, advertising and consulting services. Markets of special interest and expertise includes tourism and travel markets in the Caribbean and 'niche' or unique markets including adventure travel, eco-travel, and the scuba industry. The CLINE GROUP was founded in Dallas, Texas in 1990, with the intent of providing tourism based market consulting, research and advertising services to clients mostly based within the recreational scuba diving industry and related travel or sporting markets. Corporate

direction is serving as a full-service market consulting, research and advertising company specializing in tourism or sports industries accounts. Diving industry related market research clients the CLINE GROUP has or is currently servicing includes most of the major watersports-related destinations in the Caribbean and major corporate entities within the diving industry. Listed is a recent client and project summary, related specifically to consumer and industry positioning and product research:

- CLIENT: WALL STREET JOURNAL
- CAYMAN ISLANDS DEPARTMENT OF TOURISM
- CAYMAN ISLANDS HOTEL ASSOCIATION
- CAYMAN ISLANDS RESTAURANT ASSOCIATION
- CAYMAN ISLANDS WATERSPORTS ASSOCIATION
- RODALE PRESS, INC.
- STUART COVE'S DIVE SOUTH OCEAN
- DEDICATED RESORTS RESORT
- UNEXSO
- DIVERS ALERT NETWORK/DUKE UNIVERSITY MEDICAL CENTER
- MASTERCARD/MBNA AMERICA/TRANS NATIONAL FINANCIAL SERVICES

MASTERCARD CREDIT CARD SERVICES FOR THE DAN DIVERS CREDIT CARD

- SAND DOLLAR CONDOMINIUM & BEACH CLUB/SAND DOLLAR DIVE & PHOTO LOCATION
- DIVE PROVO/RAMADA TURQUOISE REEF RESORT
- SCUBAWARE RETAILING SOFTWARE

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