



Diving Industry Advertising, Marketing & Research

Cline's State of The Dive Industry Sentiment Study

"Lack of cohesion and a general inability to see beyond the confines of one's own business. The dive industry encompasses a vast number of partners, allies, friends however they can't see the internal connections for profit or economic sustainability. For this industry to survive, working together is the only way where all will be able to survive."

– respondent # 68, submitted 09/03/2020

325 Responses, Collected August 24th to September 21th, 2020
Created for the Global Dive Community of Businesses



Tables of Contents

I. Survey Introduction & Objectives	3
II. Executive Summary	5
III. Interpretive Notes – Overview & Conclusions	8
IV. Distribution and Response Summary	11
V. Question 1: Key Threats to Businesses	15
Notable Responses to Question #1	18
VI. Question 2: Perceived Solutions to Key Threats	20
Notable Responses to Question #2	24
VII. Question 3: Key Industry Expansion Ideas	26
Notable Responses to Question #3	30
VIII. Question 4: Key Reactivation Concepts for Inactive Divers	34
Notable Responses to Question #4	38
IX. Responses by Category & Geolocation	42
Dive Retailers and Independent Instructors	42
Dive Resorts, Dive Travel Wholesalers/ Agents & Liveboards	44
USA & Canada Responses Only	45
Non-USA/ Canada Responses Only	47
Manufacturers, Media, Training Agencies & Other Professionals	48
Appendix A: All Coded Responses	50
Appendix B: Link to Download All Responses	53
Appendix C: Infographic Depiction of Responses	54



I. Survey Introduction & Objectives

Conducted August 24th to September 21st, 2020 via online survey software

Questionnaire Author: William Cline

Overview:

This is a very different survey and therefore a challenging tabulation being 100% open-ended. A total of 325 dive companies completed this global business survey, one of the largest responses collected to date for an industry survey by Cline Group.

We, as an industry, are experiencing tremendous change that started well before this current global pandemic. We are seeing shifts in training, dive vacation habits and dive equipment purchasing patterns that all point to seismic shifts in our dive consumer base. This survey seeks the industry's assessment of where we are going by sector and what we can do to change or respond to some of the emerging trends.

The survey questions touched some nerves and varied opinions were offered; some negative, positive and everywhere in between. There is valuable quantifiable data but the true significance of this survey lies in unique and well thought-out personal responses. There are unique perspectives given that might change the way we think about some of our 'gold standards' in the industry and how we could change in the future.

Not unlike our varied industry, the comments ranged from hundreds of words while others offered just one. The nature of a sentiment survey is just that – 'opinions' and a test of our temperature as an industry while we reboot our businesses as a result of the COVID shutdown. Not surprisingly, the pandemic and its affects are a common theme as the entire world has been negatively impacted. For the first time in history, we in the diving industry are all in the same boat.

That moment of reflection is what makes this survey unique as we all stop to analyze our companies and personal futures in this industry post-COVID. We have yet to pass the halfway mark globally on any sort of recovery. In fact, many companies are literally treading water hoping to open or stay open, in many cases, to generate some revenue.

I will quote some of the notable responses and the appendix has a link to every response received. The methodology of this type of survey utilized a 'coding' system for the responses by analyzing all 1,236 question responses



(325 x 4 more or less) and then categorizing the answers. In total, there were 86 different responses to the four questions asked, which were as follows:

Q1) BEFORE the current COVID pandemic, what did you perceive was the number one threat to your dive business, regardless if it's internal within the industry or external?

313 Responses Received

Q2) What do you think we should, as an industry, do to help curb, change or reverse this problem?

311 Responses Received

Q3) How do you think, we as an industry, can attract more people to the sport?

309 Responses Received

Q4) What do you think is the best way to bring inactive divers back to the sport?

303 Responses Received

With that perspective, this qualitative research study is presented.



II. Executive Summary

The purpose of this survey was to look at our industry and try to do a 'deep dive' into some foundational issues we are all facing. Despite asking about pre-COVID problems, many respondents still reported that is the number one challenge they are facing. Without business, all reasons for your success or failure is superseded by the pandemic and is thus understandable why COVID or pandemic-related issues, such as travel restrictions, was reported as a number one concern. However, we all know this will eventually end, travel restrictions will be lifted, and life will return to normal, likely with permanent changes such as face masks and hygiene rituals.

The question becomes, will we, as an industry, come out of this stronger or in a severely weakened state? Will the future diving consumer have more patience or less for the changes that will be forced upon us as an industry? And lastly, are there changes we, as an industry, should be making to adapt to the new realities of the post-pandemic world?

My hope is this survey will serve as a tipping point for our industry's leaders and thinkers to reach beyond our comfort zones and 'think outside the current diving box', if needed, for change. With that in mind, here are the results of what, you, our industry (or at least 325 of you) have contributed.

Globally, everyone agrees we need more general positive media promotion and there definitely seems to be a concern about the quality of divers we are creating these days. In the USA, respondents claim the internet and competition from online stores and specifically Amazon is the number one threat. However, when every response is tallied, the top responses, both problem and solution shake out as follows, across all four of the questions asked.



The top 40 of 86 responses for all questions, regions and business classifications are presented as follows:

All responses codes

All combined

More Publicity / Visibility / Advertising	Mentioned 98 times
Lack of Quality Instructors or Better Training Needed	Mentioned 86 times
Economy related issues / Need	Mentioned 81 times
Vaccine / COVID / Pandemic / Travel Restriction Issues	
Internet Sales / Online Sales / Amazon	Mentioned 66 times
Make the Sport Cool / Fun / Easier / Exciting	Mentioned 62 times
Engage Kids or Market to Next Generation	Mentioned 58 times
More Affordable / Lower Prices for participation	Mentioned 55 times
Push or Promote local diving	Mentioned 51 times
Sell Sport as Ocean Advocates	Mentioned 42 times
Need Better Industry Cooperation	Mentioned 41 times
Promote as Adventure Activity	Mentioned 35 times
Discounting or Stop Discounting to Improve Profits	Mentioned 34 times
Competing Other Sports / Activities	Mentioned 33 times
Government Leadership / Bureaucracy / Regulation Issues	Mentioned 33 times
Offer Refresher courses / deal / free / low cost	Mentioned 32 times
Environmental Issues / pollution / warming / reefs	Mentioned 31 times
Sell or promote Travel More	Mentioned 30 times
Misperception About the Sport	Mentioned 29 times
Promote Sport as Social Activity & Lifestyle	Mentioned 26 times
Lack of new students / customers	Mentioned 25 times
Call or Reach Out to Inactive Customers	Mentioned 25 times
Support Local Dive Store	Mentioned 21 times
Need Icons like Jacques / Sea Hunt in today's media	Mentioned 20 times
Market saturation	Mentioned 20 times
More Social Media Marketing	Mentioned 19 times
Market to the Older Divers / Generations - not younger	Mentioned 19 times
Better Dive Shop Standards of Operation / Need Business Training	Mentioned 19 times
Manufacturer competing / direct selling	Mentioned 19 times
Hurricanes or Weather Issues	Mentioned 17 times



Bucket List Mentality - been there done it	Mentioned 17 times
Use Friends/Family to promote sport to others	Mentioned 17 times
Need better travel deals/reduce costs	Mentioned 15 times
Aging Dive Consumer	Mentioned 14 times
Training Agencies Should Advertise more	Mentioned 13 times
Continue DEMA's Try Diving Program/Pool or similar events	Mentioned 12 times
Poor Customer Service	Mentioned 11 times
Push More Continuing Education/Specialty Courses	Mentioned 11 times
Changes in Consumer Habits	Mentioned 11 times
Cross-Market to other activities	Mentioned 10 times
Manufacturer ordering issues/policies	Mentioned 10 times

These above responses will be addressed in the "Interpretive Notes" section following.



III. Interpretive Notes – Overview & Conclusions

The accuracy of this kind of research is dependent upon the familiarity of the coder with the coded answers. Having personally coded each response, I feel confident in the reported data within this report. However, here are some anecdotal or broader interpretations of the many comments boiled down into a few concise thoughts.

Key issues raised repeatedly:

- 1) **Perception of the lack of training** at the professional or instructor level, resulting in poor or improperly trained students and therefore, divers. This perception of a reduction in quality of training, mostly identified due to online learning programs and fast resort-based certifications has resulted in divers being ill-equipped to deal with their environment and therefore are uncomfortable and quickly lose the desire to dive often. The perceived result is a higher dropout rate among these poorly trained divers. This was reported across all sectors and locations as a key issue. (mentioned 86 times)
- 2) **Internet sales & related competition from Amazon** and other low-margin online retailers. Many retailers in the USA specifically cited this as their #1 business obstacle and feel that their customers purchasing from online sources significantly cut into their store's profitably and therefore their company's longevity. Also, tied with online retailers is the perception of manufacturers selling direct to consumers through internet sales and, in effect, competing with the local dive retailer on gear sales. (mentioned 87 times)
- 3) **Lack of dive industry stakeholder cooperation** among key players was cited as another issue of great concern. The thought process that seemed to ripple through the comments was if the industry could come together and collectively compile funds and efforts, we could reach out to more divers. This is especially notable as some retailers, resorts or instructors said that they wish the certifying agencies would reach out to inactive divers with an offer to return to the activity. (mentioned 54 times)

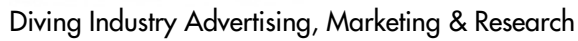


- 4) **Perception of the activity or sport.** One respondent said ‘why do we market ourselves as a sport when there are no winners or losers.’ Others felt we should market ourselves as adventurous, fun, easy cool – and in one particular response ‘sexy.’ Another comment said that diving is not for everyone and we should stop marketing as such – which contributes to our high dropout rate. Other comments focused on the need for more ‘tech diving’ promotions while others said the opposite. All sectors agreed we need to reach the next younger generation as many stated our current audience is ‘aging out’ and using family or friends to reach the younger generation is a good solution. (mentioned 181 times)
- 5) **Promote diving as an ocean or environmental advocate.** A common thread indicated that we should be pushing the environmental conservation aspect of our sport or activity to non-divers. (mentioned 43 times)
- 6) **Try diving experiences like Go Dive Now pool tour is needed** or similar opportunities for non-divers to try diving in a safe, controlled environment. (mentioned 12 times)
- 7) Overwhelming, across all sectors and locations, **everyone agreed our industry needs more positive media or social media promotions.** The responses are varied about how to accomplish this as comments ranged from partnering with the Adventure Industry Association or Outdoor Retailer Association to expand our market reach to promoting more on social media. Without a doubt, many comments suggested we needed positive diving role models like the older Jacques Yves Cousteau series, “Sea Hunt” or movies like “Into The Blue” and to sell or promote the ‘lifestyle’ of diving. (mentioned 123 times)
- 8) **How to reach inactive divers** drew many differing thoughts but the most common one was to call, email or reach out to inactive divers and invite them back to take a low or no-cost refresher or free dive. Some thought this was the training agencies responsibility while others mentioned the local dive stores or resorts. (mentioned 38 times)
- 9) **Government interference and or the need to lobby key officials** was cited primarily by international respondents and many resort areas where there is legislation or interference in diving or business activities. (mentioned 32 times)



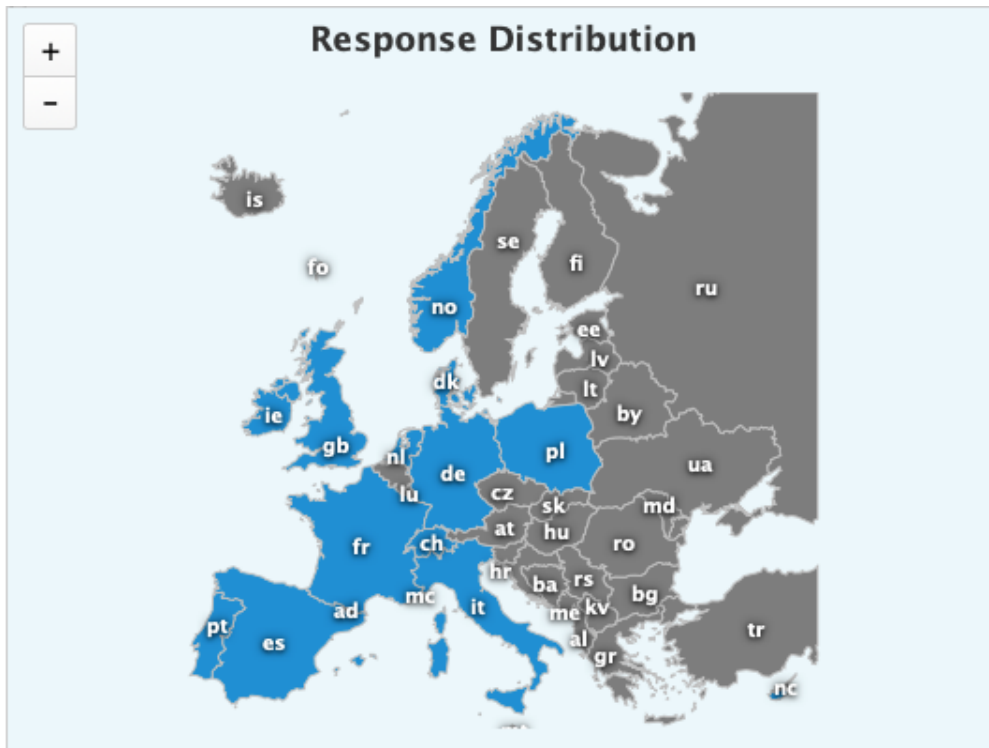
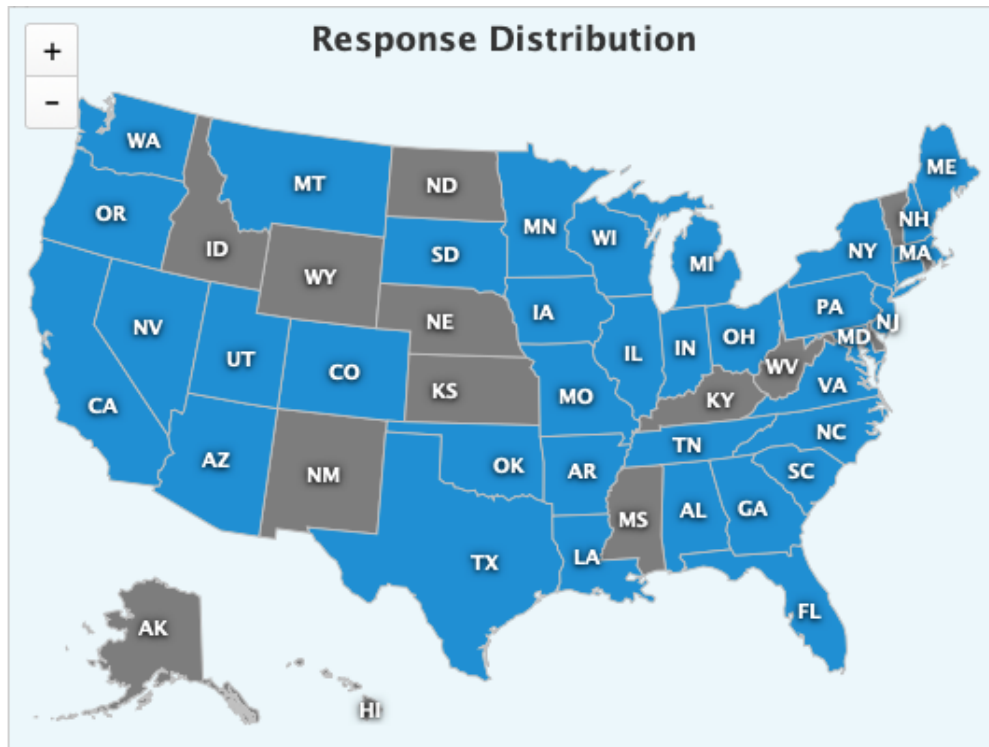
- 10) Globally, **supporting local diving and the local store** was mentioned as a way to curb inactivity and diver drop-out. Many stated the rising costs of travel and participation were primary reasons for inactivity or lack of industry growth. While almost every segment agreed supporting the local dive store was a key step to keep divers diving locally. (mentioned 91 times)
- 11) **The pandemic and general economy** were identified, as you can imagine, as a key factor affecting nearly everyone with no real solution. (mentioned 81 times)
- 12) Concern there is a **bucket-list mentality** among new or younger divers who just want to try diving and move on to another activity. Others were concerned they are seeing a general lack of interest in the younger generation due to the perceptions of the sport and again high cost of participation. Some believe the current DSD/Resort Courses fuels this bucket-list mentality and allow for a 'check mark' on the younger gen/millennial's bucket list. Some were concerned the intro experiences leave some would-be divers with a negative experience that drives them away from the activity. (mentioned 80 times)

These key takeaways are explored in notable comments and the segmentation of the answers as follows.



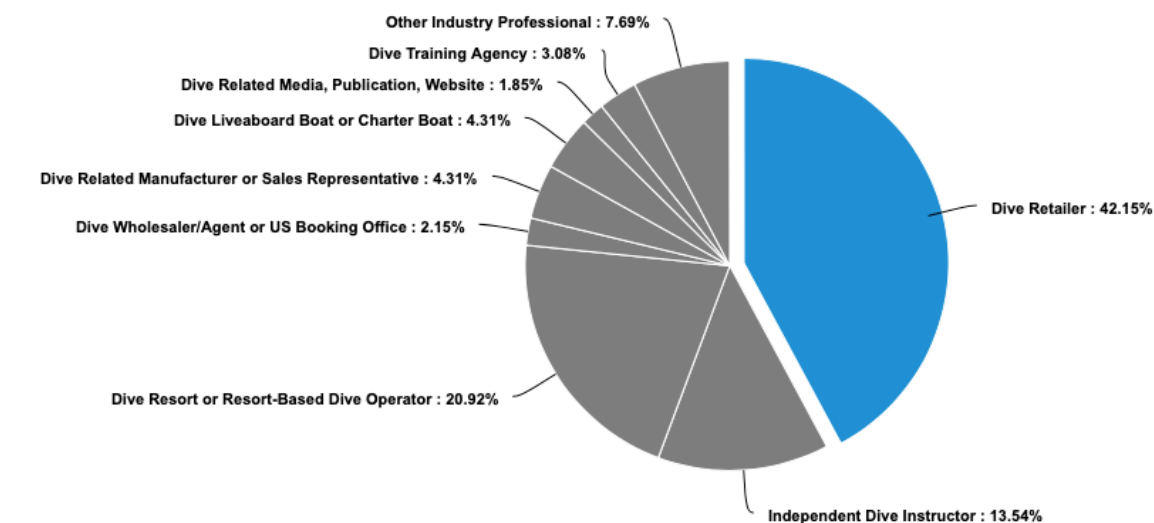
In total, 325 dive instructors, business owners and company managers completed this survey from 47 countries around the world. This is, by far, the largest and most diverse responses received for this kind of survey, making the information very unique from 47 different markets globally. Within the USA, 40 of the 52 states were represented and in Europe, 14 countries were represented as well.





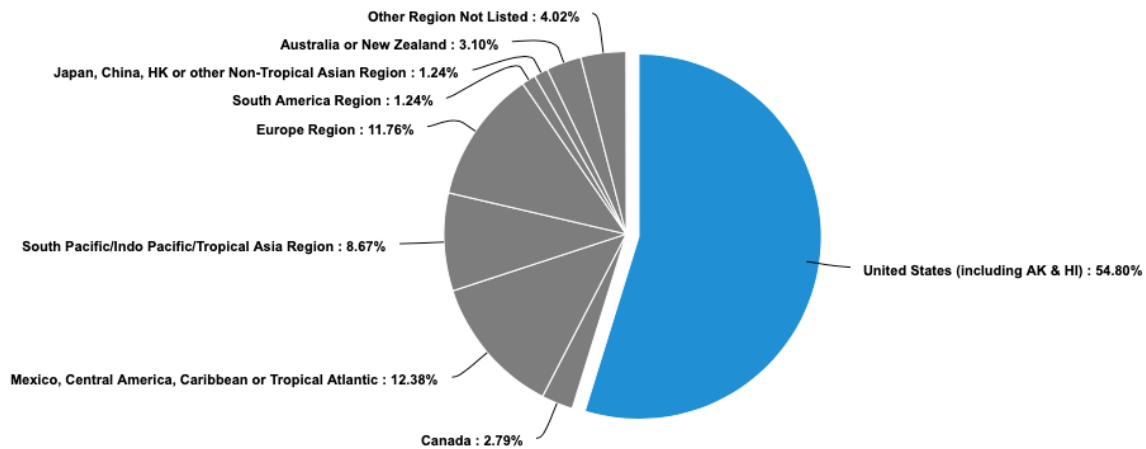


These 325 entities are identified as follows for business classifications:



Answer	Count	Percent	20%	40%
Dive Retailer	137	42.15%	<div></div>	
Independent Dive Instructor	44	13.54%	<div></div>	
Dive Resort or Resort-Based Dive Operator	68	20.92%	<div></div>	
Dive Wholesaler/Agent or US Booking Office	7	2.15%	<div></div>	
Dive Related Manufacturer or Sales Representative	14	4.31%	<div></div>	
Dive Liveaboard Boat or Charter Boat	14	4.31%	<div></div>	
Dive Related Media, Publication, Website	6	1.85%	<div></div>	
Dive Training Agency	10	3.08%	<div></div>	
Other Industry Professional	25	7.69%	<div></div>	
Total	325	100%		

Broad regions are indicated as follows:



Answer	Count	Percent	20%	40%	60%
United States (including AK & HI)	177	54.8%	<div></div>		
Canada	9	2.79%	<div></div>		
Mexico, Central America, Caribbean or Tropical Atlantic	40	12.38%	<div></div>		
South Pacific/Indo Pacific/Tropical Asia Region	28	8.67%	<div></div>		
Europe Region	38	11.76%	<div></div>		
South America Region	4	1.24%	<div></div>		
Japan, China, HK or other Non-Tropical Asian Region	4	1.24%	<div></div>		
Australia or New Zealand	10	3.1%	<div></div>		
Other Region Not Listed	13	4.02%	<div></div>		
Total	323	100%			

As evident, the 'globe' was represented across all sectors of our industry. As such, each sector, to some degree, had varying issues and solutions. Interestingly, for the most part with one major exception, globally all sectors are facing a similar set of problems; not just the pandemic.



V. Question 1: Key Threats to Businesses _____

Q1) BEFORE the current COVID pandemic, what did you perceive was the number one threat to your dive business, regardless if its internal within the industry or external? (313 Responses)

Tabulations for all categories and locations (top 10 in terms of number of responses, from most reported to least):

- Economy related issues / need vaccine / COVID / pandemic / travel restriction issues
- Competition from Internet sales / online sales / Amazon
- Competing with other sports / activities
- Lack of new students / customers
- Discounting or stop discounting to improve profits
- Environmental issues / pollution / global warming / failing reefs conditions
- Lack of quality instructors or better training needed for students
- Government leadership / bureaucracy / regulation issues
- Market over-saturation
- Hurricanes or weather issues
- More affordable / lower prices for participation

However, when this question is separated by only dive retailers, the top 10 responses are as follows:

- Competition from Internet sales / online sales / Amazon
- Economy related issues / need vaccine / COVID / pandemic / travel restriction issues
- Competing with other sports / activities
- Lack of new students / customers
- Lack of quality instructors or better training needed for students
- Discounting or stop discounting to improve profits
- More affordable / lower prices for participation
- Market over-saturation
- Bucket list mentality - been there done it
- Changes in consumer habits



For resorts, wholesalers or liveaboards, the top 10 responses were as follows:

- Economy related issues / need vaccine / COVID / pandemic / travel restriction issues
- Government leadership / bureaucracy / regulation issues
- Environmental issues / pollution / global warming / failing reefs conditions
- Discounting or stop discounting to improve profits
- Market over-saturation
- Lack of quality instructors or better training needed for students
- Hurricanes or weather issues
- Lack of new students / customers
- Engage kids or market to next generation
- More affordable / lower prices for participation

The top 10 responses from USA / Canada companies as a whole was:

- Competition from Internet sales / online sales / Amazon
- Economy related issues / need vaccine / COVID / pandemic / travel restriction issues
- Competing with other sports / activities
- Lack of quality instructors or better training needed for students
- More affordable / lower prices for participation
- Lack of new students / customers
- Bucket list mentality - been there done it
- Discounting or stop discounting to improve profits
- Changes in consumer habits
- Market over-saturation

While from everywhere else in the world, except USA and Canada was:

- Economy related issues / need vaccine / COVID / pandemic / travel restriction issues
- Environmental issues / pollution / global warming / failing reefs conditions
- Discounting or stop discounting to improve profits
- Lack of new students / customers
- Government leadership / bureaucracy / regulation issues
- Market over-saturation
- Hurricanes or weather issues
- Competing with other sports / activities
- Competition from Internet sales / online sales / Amazon
- Lack of quality instructors or better training needed for students



When manufacturers, training agencies, media and 'other' were combined, the top 10 looked like this:

- Lack of new students/customers
- Environmental issues/pollution/global warming/failing reefs conditions
- Need better industry stakeholder cooperation
- Aging dive consumer
- Competition from Internet sales/online sales/ Amazon
- Younger generation not interested in sport
- Lack of quality instructors or better training needed for students
- Manufacturers competing with retailers by direct selling to consumers
- Discounting or stop discounting to improve profits
- Engage kids or market to next generation

In looking for commonalities between all groups and locations, some issues such as market over-saturation, internet competition, and other competing sports or activities remain consistent. The table below shows how this question's top priority answers shake out across all the segments in this survey, with COVID & weather-related issues removed. The top three are highlighted for each category.

	GLOBAL ALL SEGMENTS	USA & CANADA ONLY	NON-USA & CANADA	RETAILERS & INDP	RESORTS, WS & LB	MFG, MEDIA, TRAINING & OTHER
ALL RESPONSES						
Internet Sales/Online Sales/Amazon	1	1	8	1	13	5
Competing Other Sports/Activities	2	2	7	2	12	10
Lack of new students/customers	3	6	3	3	6	2
Discounting or Stop Discounting to Improve Profits	4	7	2	5	3	8
Environmental Issues/pollution//warming/reefs	5	9	1	9	2	1
Lack of Quality Instructors or Better Training Needed	6	3	6	4	5	7
Government Leadership/Regulation Issues	7	20	4	11	1	59
Market saturation	8	8	5	6	4	23
More Affordable/Lower Prices for participation	9	4	12	7	8	37
Bucket List Mentality - been there done it	10	5	19	8	10	41

As shown, different segments have different issues, especially when non-retail and non-travel businesses are segmented.

Question 2 specifically addresses possible solutions to these threats.



Some notable responses to question #1 include:

"In a simple word: uncertainty. No matter what plans or ideas we may choose to attempt to implement we are faced with the paralysis of uncertainty both in customers and providers. I believe a strong leadership (in almost ANY direction) would be a rallying cry to our industry."

"Escalating costs to run a brick and mortar store - compressor, repair facility, training costs, while equipment sales migrate to the web - we have quite a few people come in for information, take pictures of our inventory and then shop online. It doesn't matter if we provide value add, the perception of value is being able to shop online and have it delivered - whether they know how to use it or not."

"Scuba becoming less relevant as a recreational sport. Training agency competing with me."

"Our business has to change its model. Online sales will continue to drive business away from the typical dive store and will continue to erode margins. Therefore, a dive store must shift its focus from hard good sales to services that can't be found 'online'. And the prices need to replace lost margins accordingly. Therefore, it appears that in the future, a dive store will be more focused on repair, maintenance, training, and providing the adventure, that draws people to diving in the first place."

"Quick courses that don't create divers. They churn out underwater tourists that are incapable of planning and executing their own dives. as a result, they get scared the first time out and we lose them. The other threat is dive shops that see every student as an open wallet. They oversell and sell them garbage they don't need. Those shops need to fail and go away. Gear sales need to be separate from training. Finally, is the industry's refusal to promote local diving over travel. Local divers buy more gear, take more classes, and tend to be more skilled. Many travel divers are a menace to themselves and others on top of doing little for local instructors."

"There is a trend, especially within younger generations, to "collect" experiences. As an industry, we have made it easy to visit the underwater world once, or a handful of times, while on vacation to a tropical destination. Oftentimes these experiences can be a disservice to potential divers because basic skills are rushed through in confined water in an attempt to quickly get the customer what they want - the ocean! I have talked to many people that have completed a "try scuba" while on vacation but walked away with a negative experience. At the same time, they can "check the box" that they have experienced scuba."



"The continued weak status of the dive stores. The dive industry has accepted that the retail portion of its business, the part that intersects with the public, that will teach the public, that will fill the tanks of the public and which the entire industry depends will be the weakest link. It will be, in far too many cases, untrained, undercapitalized, unprofessional, and unable to grasp the reasons that they are struggling. TWO MEN: The first man invests \$100,000 into a muffler /brake shop and puts in tough hours for the first couple of years and then more and more delegates much of the work to others. He still puts in his 40 or even 50 but no longer 60, 70, or more. He is closed on Sundays. After 20 years he sells his successful business which has a gross profit of \$400,000 per year for \$4,000,000. He settles into retirement. The second man opens a retail dive store. He invests \$100,000 and works days, weekends, nights for the first couple of years. He is the instructor, the manager, the janitor, the serviceman, the travel agent, the salesman, and do all for the dive store. He starts to do better but too often after 20 years he is making \$25,000 to \$100,000 per year (including his pay) and he tries to sell the company. No one wants it, so he closes it and sells everything for \$.25 on the dollar. I have seen this over and over again for the last 36 years, hundreds of times. Or they never get past the first 3 to 5 years! What is really crazy is that the industry goes on as if this is normal. No one goes 'What the hell is going on here? We HAVE to change this!' Something does have to change because the retail dive stores as a whole are broken. Can I name dozens of healthy dive stores? Yes. But it will take more than 50 good stores to sustain the agencies, the magazines, and the manufacturers. It's time to do something."

"Zero to Hero practice of flooding the market with newly certified instructors devaluing experience, quality, and real service. By working for nothing or close to it, they devalue diving across the island, leading to corners being cut in all aspects of most dive shops. The practice of employing dive instructors with no managerial or business experience as dive shop managers. These factors make running a professional dive operation charging realistic prices, understanding true business costs, fixed and variable almost impossible. The constant question of 'why so expensive?' when the real question should be 'why so cheap?'"

"Lack of cohesion and a general inability to see beyond the confines of one's own business. The dive industry encompasses a vast number of partners, allies, friends however they can't see the internal connections for profit or economic sustainability. For this industry to survive, working together is the only way where all will be able to survive."

"Dependence on an outdated business model which does not recognize how the consumer, industry and marine resources (especially coral reefs) have changed in the last 30 years."



VI. Question 2: Perceived Solutions to Key Threats _____

Q2) What do you think we should, as an industry, do to help curb, change or reverse this problem? (311 Responses)

Tabulations for all categories and locations (top 10 in terms of number of responses, from most reported to least):

- Lack of quality instructors or better training needed for students
- Economy related issues/need vaccine/COVID/pandemic/travel restriction issues
- Competition from Internet sales/online sales/Amazon
- More affordable/lower prices for participation
- More publicity/visibility/advertising needed
- Need better industry stakeholder cooperation
- Government leadership/bureaucracy/regulation issues
- Manufacturers competing with retailers by direct selling to consumers
- Sell the sport as an ocean/marine/eco advocate
- Engage kids or market to next generation
- Support local dive store

However, when this question is separated by just dive retailers, the top 10 responses are as follows:

- Competition from Internet sales/online sales/Amazon
- Lack of quality instructors or better training needed for students
- More publicity/visibility/advertising needed
- More affordable/lower prices for participation
- Manufacturers competing with retailers by direct selling to consumers
- Economy related issues/need vaccine/COVID/pandemic/travel restriction issues
- Need better industry stakeholder cooperation
- Support local dive store
- Manufacturer ordering issues/policies
- Make the sport cool/fun/easier/exciting
- Promote the sport as adventure activity



For resorts, wholesalers or liveaboards, the top 10 responses were as follows:

- Economy related issues/need vaccine/COVID/pandemic/travel restriction issues
- Lack of quality instructors or better training needed for students
- More affordable/lower prices for participation
- Government leadership/bureaucracy/regulation issues
- Environmental issues/pollution/global warming/failing reefs conditions
- More publicity/visibility/advertising needed
- Market over-saturation
- Engage kids or market to next generation
- Sell the sport as an ocean/marine/eco advocate
- Discounting or stop discounting to improve profits
- Hurricanes or weather issues
- Competition from Internet sales/online sales/Amazon
- Lack of airlift and or accommodations
- Need better industry stakeholder cooperation
- Lower training agency fees or renewals

The top 10 responses from USA/Canada companies as a whole was:

- Competition from Internet sales/online sales/Amazon
- Lack of quality instructors or better training needed for students
- Manufacturers competing with retailers by direct selling to consumers
- More affordable/lower prices for participation
- Manufacturer ordering issues/policies
- More publicity/visibility/advertising needed
- Economy related issues/need vaccine/COVID/pandemic/travel restriction issues
- Need better industry stakeholder cooperation
- Support local dive store
- Discounting or stop discounting to improve profits
- Engage kids or market to next generation
- Make the sport cool/fun/easier/exciting



While from everywhere else in the world, except USA and Canada was:

- Lack of quality instructors or better training needed for students
- Economy related issues/need vaccine/COVID/pandemic/travel restriction issues
- More affordable/lower prices for participation
- Government leadership/bureaucracy/regulation issues
- Sell the sport as an ocean/marine/eco advocate
- More publicity/visibility/advertising needed
- Need better industry stakeholder cooperation
- Environmental issues/pollution/global warming/failing reefs conditions
- Engage kids or market to next generation
- Competition from Internet sales/online sales/Amazon
- Support local dive store
- Promote the sport as adventure activity

When Manufacturers, Training Agencies, Media and 'Other' were combined, the top 10 looked like this:

- Lack of quality instructors or better training needed for students
- Need better industry stakeholder cooperation
- Sell the sport as an ocean/marine/eco advocate
- Lack of new students/customers
- Manufacturers competing with retailers by direct selling to consumers
- Engage kids or market to next generation
- More publicity/visibility/advertising needed
- Push or promote local diving
- More affordable/lower prices for participation
- Continue DEMA's Try Diving program/pool or similar events
- Stop marketing sport for everyone
- Economy related issues/need vaccine/COVID/pandemic/travel restriction issues

In looking for commonalities between all groups and locations, some issues such as quality of training for both instructors and students, as well as engaging the next generation of divers seem to be a common thread.



The following table shows how this question's top priority answers shake out across all the segments in this survey, with COVID & weather-related issues removed. The top three are highlighted for each category.

ALL RESPONSES	GLOBAL ALL SEGMENTS	USA & CANADA ONLY	NON-USA & CANADA	RETAILERS & INDP	RESORTS, WS & LB	MFG, MEDIA, TRAINING & OTHER
Lack of Quality Instructors or Better Training Needed	1	2	1	2	2	1
Internet Sales/Online Sales/Amazon	2	1	10	1	10	15
More Affordable/Lower Prices for participation	3	4	3	4	3	11
More Publicity/Visibility/Advertising	4	5	5	3	5	3
Need Better Industry Cooperation	5	7	6	6	12	2
Government Leadership/Regulation Issues	6	15	2	9	1	59
Manufacturer competing/direct selling	7	3	22	5	61	6
Support Local Dive Store	8	9	9	7	28	22
Sell Sport as Ocean Advocates	9	34	4	15	8	4
Engauge Kids or Market to Next Generation	10	12	8	14	7	7

As illustrated by this table, all segments agree pretty much on the top three to four solutions to threats identified in question #1.



Some notable responses to question # 2 include:

"Promote the industry as an entity. Make wise decisions"

"As an industry, we have to stop the in-fighting. Over the last few months, I have received multiple emails offering to cross me and my staff over to other agencies for FREE. What good does this do the industry? ZERO! If the training agencies want to spend money, they should do it on diver acquisition rather than trying to steal market share from within. There are 6 Billion people in the World and only about 40 million certified divers. Growing our market is better than fighting within for share."

"We need more cohesive strategies to work together rather than be competitors. Our biggest threat is people turning away from diving and going to another leisure activity. Outdoor Retailer Association does this brilliantly - everyone works together to get more customers outdoors. Why can't the dive industry not do the same? This is a trend in all outdoor activities - the ski industry works together, the water sports industry works together, even the biking industry works together!"

"Promote local diving. Starting with the local dive stores and going all the way up to the manufacturers. Travel is an important part of the retail store business but so is local diving. If our customers are only diving once every year or two they are not likely to purchase equipment, but if they are diving 6 or 7 times or more a year, equipment purchases are now more likely."

"Great question. Changing the behaviors of the newer generations will be a year's long effort. Need to find what appeals to the younger generation(s) to keep them engaged in diving and dive travel."

"Bridge the gap for new divers promote a mentoring program to keep new divers diving."

"Make Diving great again. Stop selling courses, activities, and gear cheap. Focus on saving the earth and great adventure."

"Begin having in-person classes vs elearning"

"Diving is an expensive equipment-reliant activity. Most businesses who are on the ball renew and upgrade their rental/teaching inventory regularly. If there was not the fear of liability issues down the road could there be some kind of clearinghouse aimed at getting that equipment into the hands of groups who would use it?"



“Form a separate subsidiary company of DEMA whose mission is to significantly increase new diver certification and diver retention. DEMA's role would be to seek other sources of revenue besides the DEMA show and look at aligning with other adventure associations.”

“Education, but it needs to stop being [training agency name] doing their educating to their stores and others doing educating to blah, blah, blah. This needs to be an independent education. Education that is 100% oriented toward the dive store. NOT how to use the agency's programs to make more money for the agency. That is killing off some of the stores because it leads them away from doing some of the things they need to do to survive. Stores need REAL, PRACTICAL, RESULT ORIENTED ideas, and education. It should be 3 or 4 days long every year, sponsored by everyone - manufacturers, magazines, destinations, agencies, etc. and presented by DEMA. There should be a placement exam at the beginning that would direct store owners to 1. Basic Business Principles 2. Being a Healthy Dive Store 3. Being a Prosperous Dive Store. Your placement exam tells you where you go, with no exceptions. Repeat this year after year, put a 2-day DEMA show at the end. Make the EDUCATION FREE but materials can be paid for. This will get dive stores to eventually bring more and more staff with them. Then they all buy DEMA tickets and now the DEMA show gets the attendance it once had. So dive stores fly in on Sunday or Monday - Take 1-hour placement anytime on Monday. Classes start Tuesday thru Thursday, DEMA is on Friday and Saturday, and fly home on Sunday. This would literally change the dive industry with the RIGHT training and there is no reason to doubt that it could be done. Help them where they need help.”

“Popularize scuba diving as a sport hobby. We need to get younger people interested and motivated to become divers. Our current diver population is aging and dying off. We need to get younger people to recognize diving as an extreme sport the same as rock climbing and other activities. They need to recognize that is just as thrilling.”

“Realize that advertising on social media is largely ineffective.”

“Let travel agents be travel agents and let dive store operators be dive operators, not both.”



VII. Question 3: Key Industry Expansion Ideas _____

Q3) How do you think, we as an industry, can attract more people to the sport? (309 Responses)

Tabulations for all categories and locations (top 10 in terms of number of responses, from most reported to least):

- More publicity / visibility / advertising needed
- Engage kids or market to next generation
- Lack of quality instructors or better training needed for students
- Make the sport cool / fun / easier / exciting
- Sell the sport as an ocean / marine / eco advocate
- Misperception about the sport
- Need icons & heroes like Jacques / Sea Hunt in today's media
- Promote the sport as adventure activity
- Need better industry stakeholder cooperation
- More social media marketing
- Push or promote local diving

However, when this question is separated by just dive retailers, the top 10 responses are as follows:

- Offer free or low-cost refresher courses to reactivate inactive divers
- Call or reach out to inactive customers
- Make the sport cool / fun / easier / exciting
- Push or promote local diving
- More affordable / lower prices for participation
- Engage kids or market to next generation
- Lack of quality instructors or better training needed for students
- Promote sport as social activity & lifestyle
- Sell or promote travel more
- More publicity / visibility / advertising needed
- Promote the sport as adventure activity
- Sell the sport as an ocean / marine / eco advocate
- Use friends / family to promote sport to others



For resorts, wholesalers or liveaboards, the top 10 responses were as follows:

- More publicity / visibility / advertising needed
- Make the sport cool / fun / easier / exciting
- Offer free or low-cost refresher courses to reactivate inactive divers
- Push more continuing education / specialty courses
- Economy related issues / need vaccine / COVID / pandemic / travel restriction issues
- Sell the sport as an ocean / marine / eco advocate
- Push or promote local diving
- Lack of quality instructors or better training needed for students
- More affordable / lower prices for participation
- Engage kids or market to next generation
- Need better travel deals / reduce costs
- Sell or promote travel more
- Use friends / family to promote sport to others
- Bucket list mentality - been there done it
- Training agencies should advertise more

The top 10 responses from USA / Canada companies as a whole was:

- Offer free or low-cost refresher courses to reactivate inactive divers
- Push or promote local diving
- Call or reach out to inactive customers
- Make the sport cool / fun / easier / exciting
- More affordable / lower prices for participation
- Lack of quality instructors or better training needed for students
- Engage kids or market to next generation
- Sell or promote travel more
- Promote sport as social activity & lifestyle
- More publicity / visibility / advertising needed
- Promote the sport as adventure activity
- Sell the sport as an ocean / marine / eco advocate
- Use friends / family to promote sport to others



While from everywhere else in the world, except USA and Canada was:

- Make the sport cool/fun/easier/exciting
- More publicity/visibility/advertising needed
- Offer free or low-cost refresher courses to reactivate inactive divers
- Push or promote local diving
- Call or reach out to inactive customers
- Sell or promote travel more
- Promote sport as social activity & lifestyle
- Economy related issues/need vaccine/COVID/pandemic/travel restriction issues
- More affordable/lower prices for participation
- Sell the sport as an ocean/marine/eco advocate
- Engage kids or market to next generation
- Use friends/family to promote sport to others
- Push more continuing education/specialty courses

When Manufacturers, Training Agencies, Media and 'Other' were combined, the top 10 looked like this:

- Push or promote local diving
- Promote sport as social activity & lifestyle
- Make the sport cool/fun/easier/exciting
- More publicity/visibility/advertising needed
- Sell or promote travel more
- Call or reach out to inactive customers
- Need better industry stakeholder cooperation
- More strategic market research
- More local public access to diving
- Offer free or low-cost refresher courses to reactivate inactive divers
- Use friends/family to promote sport to others

In looking for commonalities between all groups and locations, offering discounted or free refreshers, reaching out to inactive divers via phone or email, as well as promote the sport as easy, fun and/or cool are among the top responses.



The following table shows how this question's top priority answers shake out across all the segments in this survey, with COVID & weather-related issues removed. The top three are highlighted for each category.

ALL RESPONSES	GLOBAL ALL SEGMENTS	USA & CANADA ONLY	NON-USA & CANADA	RETAILERS & INDP	RESORTS, WS & LB	MFG, MEDIA, TRAINING & OTHER
More Publicity/Visibility/Advertising	1	1	1	1	1	1
Engage Kids or Market to Next Generation	2	2	4	2	3	4
Lack of Quality Instructors or Better Training Needed	3	5	2	3	2	2
Make the Sport Cool/Fun/Easier/Exciting	4	3	5	4	5	6
Sell Sport as Ocean Advocates	5	19	3	12	4	3
Misperception About the Sport	6	9	8	5	7	16
Need Icons like Jacques/Sea Hunt in today's media	7	4	10	6	6	23
Promote as Adventure Activity	8	10	7	7	15	5
Need Better Industry Cooperation	9	11	6	11	8	7
More Social Media Marketing	10	21	9	16	9	12

Similar to question #2, all segments are fairly closely aligned on what is needed to expand our industry and bring in new customers. Again, the issue of quality training seems to be a prevalent response across all segments. All agree also more industry marketing and promotions are needed as well.



Some notable responses to question #3 include:

"We reach out to the demographic that TRULY is drawn to our sport! Stop wasting time trying to 'grow' a 'perceived future' of the sport and concentrate on reaching those we have and NEED now! Remind people NOW of what we offer and can do!"

"This sport is NOT for everyone and we need to stop that marketing strategy immediately."

"Make it easier for people to understand how they can help the environment & learn more about it. Less 'shark weeks' and more 'reef weeks'"

"The younger generation seems to be more attuned to seeking entertainment via electronics versus outdoor activities. We need, as an industry, to create more excitement and desire for people to satisfy their need for entertainment through leisure sports and travel."

"Highlight the wonders and beauty of the underwater environments. Now is the most important time for the larger training agencies to provide marketing assistance to the independent instructors and help the smaller training providers to be able to navigate in this time of uncertainty."

"We offer a date night, offer dinner and a DSD."

"Promote as a healthy and relaxing sport with lots of opportunities for both individuals and families."

"This is a deep question, is the effort to attract more people to the sport in hopes of some stay or to attract more people and grow the industry? We are competing with several other industries for space disposable dollars so there has to be a careful balance. Appealing to customers' sense of adventure will aid in attracting more but we have to show how diving can be a life-long sport that continues to deliver the stimulus younger customers want. Show how this sport is different and more valuable and rewarding than other sports."

"It is obvious that brand building without linking it to enrollments is a road to disaster. The dive centers cannot afford to attract new clients."



"The parties that can afford to promote and attract customers do nothing to pass those acquisitions onto the dive centers that train. The business model and relationship between the agencies and dive centers need to change."

"I could write a book. 1. make DEMA a worldwide organisation, 2. encourage all dive shops to be involved in the Go Dive Now campaign. 3. Have a library of good performing social media from all over the world that dive centers can use and also add their own good performing material. 4. DEMA to have training programs regularly with down to earth, how to do things information. 5. Encourage dive operators to work together to promote the industry."

"Make people realize the value of a scuba certification. People perceive scuba diving as expensive as opposed to other more costly sports such as golf or cycling."

"Make it interesting and exciting again. Stop spreading the lie that anyone can dive. They can't. We lose people to activities that convey a real sense of adventure and risk. And it's not a fucking sport. It's not a competition and there are no winners. It's an activity. Period."

"There are a lot of alternatives that compete with scuba for outdoor enthusiasts - golf, skiing, hiking, mountain biking, etc. - and there isn't currently a lighthouse that makes scuba stand out. In the early days Jacques Cousteau or Mike Nelson brought wonder and excitement to the sport. aside from appearances on Shark Week or episodes of shows like Destination Unknown, there isn't a tv series (or feature movie) that highlights the beauty, excitement, and fascination that scuba provides. Blue Planet has been remarkably popular in highlighting environmental issues through beautiful imagery. I think the industry needs a modern Netflix series like Sea Hunt, which has scuba as a central element, has an exciting storyline, and used the beautiful imagery of the underwater world. Adaptations of stories by Clive Cussler or Eric Douglas would support this idea."

"Focus on bringing younger people into leadership roles. Too many good old boys stuck in the 80s mentality that are out of touch with the biggest potential customer base, young people."

"More positive PR, creative advertising, and organized Press Trips. Most government agencies don't appreciate the value of dive travel, and the irony is, divers travel when most islands are at low occupancy."

"We are doing it, make it fashionable & sexy."



“Partnering with schools, PE teachers, offering scuba discoveries.”

“Whilst we know full well that the Human species is messing up our natural environment, experiencing our underwater world of coral reefs etc. is an opportunity for many people to see how our planet bio-diversity has evolved over the passing of millions of years. We typically only get to witness nature doing what nature does best by going underwater. Most landscapes above the water line these days have multitudes of eyesore variations to nature's landscape, meaning coastlines clogged with resorts, highways cut through hills, tall buildings etc. etc. Somehow as an industry, we need to generate interested curiosity with the general populace, that by going underwater and escaping the plethora of land-based visual alteration to nature, and seeing how nature does things underwater when largely left alone to get on with the job of evolution, we may see an increased desire for people to connect with nature and its beauty - and become divers because of their love for nature, and not for being the cool dude who has 30+ certifications but still can't manage buoyancy properly.”

“This will sound like anti-tech, but I'd say ore people view and would want to emulate diving as in the last great cinematic diving movie 'into The Blue' with real-life great diving skilled actors Paul Walker, Jessica Alba, and Scott Cann. Granted we all wouldn't be as young, fit, etc. But that's how people would view the sport as attractive and fun. Even if for the movie the gear (mostly) was simple and streamlined looking. I really am biased beginning in 1969 with just a tank, weight belt, zip up safety vest, etc. But even in my 50th year still diving I use a fairly similar rig. Aqualung ZUMA simple BCD, integrated Octo / inflator, a simple wrist computer, etc. I dive all safety gear such as a whistle, safety sausage, and snorkel strapped behind the compact wing from the Maldives to the Philippines to the Caribbean to my local Ohio quarry. I lead trips all over the world and see my customers so laden with bulky BCD, flexible silly snorkels with nuclear cooling towers atop them, and more than impede their enjoyment of the sport. Compare that to at least the simple free diver's gear. Somehow, we've lost our way making diving fun and easy. I'll keep diving and organizing trips as long as I'm healthy and enjoy taking people to gret destinations. But I do fear participation in diving will still gradually decline.”

“Good question! You know, people follow people in the news/movies/tv--celebrities. People with lots of face time to lots of people. Get them involved, save the reefs, anything that would put the sport of diving in a positive light and as something fun to do, because (yuk) a celebrity does it. For example, I remember seeing Al Roker diving in the Caymans years ago--that stuck with me.”



"Showing people diving on TV or on social media. Things like getting the Bachelor and date to do a resort course. Having social media influencers get certified and go on vacation. DEMA doesn't have the resources to do an ad campaign but they might be able to afford to hire someone to do the above."

"Develop a culture and a passionate approach to the environment. Stop selling scuba... encourage participation where scuba is the natural activity."

"I think fear is in the way, and marketing and demonstrating safety are the way back. Also, student programs and children's' programs help."

"Make it cheaper...every single person I have ever asked (that wanted to learn how to dive), has stated the cost as being the reason. For North Americans it can often cost similar to a month's rent just to do Open Water...and most often you'd be purchasing at least a mask and fin which is another couple of hundred on top of the course. This could also be the reason more people learn in warm water since it's cheaper to stay at an island hostel in the Caribbean while taking the course than accommodations in North America."



VIII. Question 4: Key Reactivation Concepts for Inactive Divers _____

Q4) What do you think is the best way to bring inactive divers back to the sport? (303 Responses)

Tabulations for all categories and locations (top 10 in terms of number of responses, from most reported to least):

- Make the sport cool/fun/easier/exciting
- Offer refresher courses/deal/free/low cost
- Push or promote local diving
- Call or reach out to inactive customers
- More publicity/visibility/advertising
- More affordable/lower prices for participation
- Sell or promote travel more
- Promote sport as social activity & lifestyle
- Engage kids or market to next generation
- Lack of quality instructors or better training needed
- Sell sport as ocean advocates
- Use friends/family to promote sport to others

However, when this question is separated by just dive retailers, the top 10 responses are as follows:

- Offer refresher courses/deal/free/low cost
- Call or reach out to inactive customers
- Make the sport cool/fun/easier/exciting
- Push or promote local diving
- More affordable/lower prices for participation
- Engage kids or market to next generation
- Lack of quality instructors or better training needed
- Promote sport as social activity & lifestyle
- Sell or promote travel more
- More publicity/visibility/advertising
- Promote as adventure activity
- Sell sport as ocean advocates
- Use friends/family to promote sport to others



For resorts, wholesalers or liveaboards, the top 10 responses were as follows:

- More Publicity / Visibility / Advertising
- Make the Sport Cool / Fun / Easier / Exciting
- Offer Refresher courses / deal / free / low cost
- Push More Continuing Education / Specialty Courses
- Economy related issues / Need Vaccine / COVID / Pandemic / Travel Restriction Issues
- Sell Sport as Ocean Advocates
- Push or Promote local diving
- Lack of Quality instructors or Better Training Needed
- More Affordable / Lower Prices for participation
- Engage Kids or Market to Next Generation
- Need better travel deals / reduce costs
- Sell or promote Travel More
- Use Friends / Family to promote sport to others
- Bucket List Mentality - been there done it
- Training Agencies Should Advertise more

The top 10 responses from USA / Canada companies as a whole was:

- Offer Refresher courses / deal / free / low cost
- Push or Promote local diving
- Call or Reach Out to inactive Customers
- Make the Sport Cool / Fun / Easier / Exciting
- More Affordable / Lower Prices for participation
- Lack of Quality instructors or Better Training Needed
- Engage Kids or Market to Next Generation
- Sell or promote Travel More
- Promote Sport as Social Activity & Lifestyle
- More Publicity / Visibility / Advertising
- Promote as Adventure Activity
- Sell Sport as Ocean Advocates
- Use Friends / Family to promote sport to others



While from everywhere else in the world, except USA and Canada was:

- Make the Sport Cool/Fun/Easier/Exciting
- More Publicity/Visibility/Advertising
- Offer Refresher courses/deal/free/low cost
- Push or Promote local diving
- Call or Reach Out to inactive Customers
- Sell or promote Travel More
- Promote Sport as Social Activity & Lifestyle
- Economy related issues/Need Vaccine/COVID/Pandemic/Travel Restriction Issues
- More Affordable/Lower Prices for participation
- Sell Sport as Ocean Advocates
- Engage Kids or Market to Next Generation
- Use Friends/Family to promote sport to others
- Push More Continuing Education/Specialty Courses

When Manufacturers, Training Agencies, Media and 'Other' were combined, the top 10 looked like this:

- Push or Promote local diving
- Promote Sport as Social Activity & Lifestyle
- Make the Sport Cool/Fun/Easier/Exciting
- More Publicity/Visibility/Advertising
- Sell or promote Travel More
- Call or Reach Out to inactive Customers
- Need Better industry Cooperation
- More Strategic Market Research
- More local public access to diving
- Offer Refresher courses/deal/free/low cost
- Use Friends/Family to promote sport to others

In looking for commonalities between all groups and locations, offering discounted or free refreshers, plus more industry promotions in general to non-divers are mentioned by all segments. Another common thread was promoting local diving or the local shop and using friends and family to reach the next generation as well as promoting the sport as a lifestyle activity.



The following table shows how this question's top priority answers shake out across all the segments in this survey, with COVID & weather-related issues removed. The top three are highlighted for each category.

ALL RESPONSES	GLOBAL ALL SEGMENTS	USA & CANADA ONLY	NON-USA & CANADA	RETAILERS & INDP	RESORTS, WS & LB	MFG, MEDIA, TRAINING & OTHER
Offer Refresher courses/deal/free/low cost	1	2	3	1	3	10
Make the Sport Cool/Fun/Easier/Exciting	2	4	1	4	2	2
Push or Promote local diving	3	1	4	2	6	3
Call or Reach Out to Inactive Customers	4	3	5	3	15	6
More Publicity/Visibility/Advertising	5	11	2	11	1	4
Sell or promote Travel More	6	6	6	7	13	5
More Affordable/Lower Prices for participation	7	5	10	5	12	17
Promote Sport as Social Activity & Lifestyle	8	7	7	10	25	1
Use Friends/Family to promote sport to others	9	10	11	8	9	11
Engauge Kids or Market to Next Generation	10	8	9	6	8	27

As shown, much like question #3 for expansion, there is near agreement across all segments on how to bring back inactive divers, in general terms.



Some notable responses to question #4 include:

“Get their kids or grandkids diving.”

“I don't know if anyone has ever surveyed divers who became inactive for multiple years and asked them why. It would be interesting to see the responses and would likely answer this question. It would be amazing if a training agency would survey all of their Open Water certified divers for the last 10 years and specifically collect data on those who no longer dive or those who took a break of a year or more and then came back into the sport. Again, I go back to families as I find many 20/30-year-olds get certified and then get married, have kids, etc., and fall out of diving. If you had a way to bring the kids back in you would bring the parents back too.”

“There are generations of divers who used simple gear that are put off by modern contraptions. A simpler way to bring them back would be comprehensive but short sessions updating them to dive computers, refreshing basis skills such as mask and regulator clearing plus BCD use for buoyancy control, etc. Some might even buy new gear and book a dive trip! Sorry if I ranted too much but what I've seen in 50 years of continual diving (I was an avid snow skier, motorcycle, runner, etc.) Is a cycle that has us where we are today... Despite enjoying other activities, I always came back to diving as my first love. It's given me so much in the way of friendships, experiences, and travel opportunities. To see where it is now is kind of disheartening. Today's legal climate is also a concern and one has to be careful to not offer any advice if not an active insured instructor. I've long retired from active teaching (in 1990.). That risk used to be managed by having control over issuing a student's C-card. What I see is too many are turned out before competent skills are acquired. It's not only a disservice to the customer but to the industry and those people drop out shortly. I'm not saying a 'militaristic' training approach like SEAL / BUDS training should reappear. But as mentioned earlier diving used to be such a fun and simple activity. I still subscribe any reasonably fit/comfortable in the water person could be taught the 5-6 basic things in a pool and go diving the afternoon (supervised of course.) In addition to being a supporter of 'performance-based learning' I've long touted online for the theory of diving. This is a problem for many dive stores who fear they'll lose 'face time' translating to less get and possibly travel sales. I think that's a false worry. An Ohio dive store I know gets people in their warm inside pool year-round, ensures their skill level is confident, sells them gear and takes them diving to wonderful locations around the globe. The emphasis on creating lifelong scuba enthusiasts owning their own gear simply works. Sorry for the long diatribe. I'll leave you to edit and distill it to anything that might work the way up the chain to those controlling scuba activity these days. For me, I'm scheduled to go diving to the Maldives late April 2021, the Philippines June 2021, Moorea for Humpback Whale snorkeling Oct.



2021, Fiji Feb. 2022, and even Raja Ampat in 2023 so I won't be hanging up my fins yet. I sincerely hope there are lots of folks who want to go adventuring with me with old and new dive enthusiasts :)"

"Reach out to them directly. If nothing else we can find out why they went inactive."

"Scuba divers fade away from diving for a number of reasons; marriage, family & kids, buying a house, changing jobs, or just finding it too hard to stay active. Also, there is nothing competitive about our sport which can give it 'sex' appeal. While most divers like the lack of competition, it also cuts into our exposure. Can we create diving games which may make divers want to participate again? People buy expensive boats and fishing gear just to catch a bigger fish to show a friend. Golfers spend money every year on clubs and greens fees. So it's not just the money which keeps people away. But while there may be a golf course in or near every town, there are very few places to dive once you get away from the coasts."

"We need a strong local diving presence - something that we can focus on even with current pandemic challenges. It's easy to highlight the exotic, warm and colorful destinations in marketing materials, but as an industry, we seemed to have shifted the majority of our focus away from local dive centers and onto destination dive operators. With that focus, divers have the experience once or twice a year and it becomes easy for them to drift away. It isn't front of mind for them, they are "rusty" and uncomfortable for their first few dives on each trip, and they are more likely to simply rent equipment from the resort than have their own gear. A focus on local, inland, freshwater dive opportunities could help to change this. Reenergize local dive clubs. Increase stories in dive publications that feature excellent local diving rather than the "cold, dark quarry" descriptions that we typically see. Establish and promote geocaching sites. Coordinate programs and promotions for local diving similar to the Florida Keys Wreck Trek or the Kentucky Bourbon Trail. Keep people engaged and excited about local diving and they will talk to friends and coworkers about diving. If we give them a hobby to come back to that isn't an occasional vacation trip, we are more likely to keep the Divers we have and recapture some of the ones we have lost."

"We hear a lot that folks stop diving and traveling after starting families. Why would you focus on an activity that you can't enjoy with your toddlers? You can ride bikes with them. Walk and camp with them. Take them fishing down at the dock. Maybe we need to remind people about how excited they were to breathe underwater and suggest they try it with their children who are no longer toddlers."



"Through community engagement and local diving."

"Give shops and instructors ideas/plans/incentives to reach out to past students. Find out why the divers lost interest."

"Training agencies are the only group that has the most complete records of divers out there. Perhaps offer a discounted refresher and give instructor/store credit on future product."

"Physical fitness and social activities."

"SSI should offer a free digital app to get the divers into the new age of scuba."

"Offer more opportunity to advance easily and use new tech to draw people in. Something like renting GoPro cameras for a small fee so divers can take pictures and have access to them without having to buy the device."

"Family dive trips. Father and son traveling together, where the father wants his son to learning diving. This is a successful strategy in the fishing market — has now grown to nearly 50-million anglers."

"To begin requiring certifications to have a specified number of dives in a three-year period."

"Make diving exciting. However, we also have to accept that a very large (and growing) percentage of people just want to try diving and may not want to continue. Sure, try to Con Ed & retain them, or get them back after inactivity, but there are so many people out there who have not yet tried scuba diving. These may be an easier target with higher success and satisfaction rates. It is also much easier to make it exciting for people who have never tried it before and are new, young, and fresh to the activity/sport. Get those and work on them to develop and retain, rather than the old, boring, done-most-of-it inactive diver, who can be incredibly hard to excite and please at times."

"Talk to them. Stop using social media avenues all the time, as this generation of inactive divers appreciates the face to face interactions. Social Media is just a circle of the diving many of us were doing 10, 15, or 20 & 25 years ago. Inactive divers are [inactive] also because instructors have become lazy. Where operators believe in 'build it and they will come' attitudes. A true Market Segmentation study has yet to be fully done. As it is so large, yet training agencies are not prepared to get involved in, as they think they know better."

"Events like Oceanfest at Fort Lauderdale-by-the-Sea where divers can try new gear and see the upcoming products."



“Allow the certification to actually expire then we would generally have less inactive divers. Another way would be an incentive, for example, take the reactivate and get 1 / 2 off your next course or receive a free something. There is also the fact that a lot of inactive divers feel like since they don't have their cards anymore that they cannot dive, could do something in that regard as well, let them know they can be looked up by the dive shop, etc.”

“Encourage local diving, [like] geocache diving.”

“Hosting dive trips, even if trips are to local dive areas. Micro trips allow divers to meet new buddy's and become active again.”

“Active divers need to find in-active divers and encourage them to get back in. Invite them to get a refresher and join you on a trip.”

“This is a greedy world, and everyone wants something for free. If something is offered as a free gift, or credit toward something else, it might give someone an incentive to get back into the water.”

“Make diving fun again, and not about the hard sell for ongoing training. I know this is easy to state, and a lot harder in reality as most dive centers rely upon training and equipment sales to survive as a business. Myself personally as a dive business owner, would not be involved in the industry if the only option was to own a typical dive center selling training courses and equipment, I wouldn't be in the industry. My enjoyment comes from seeing the joy divers have upon returning from their coral reef recreational dives with a whole new appreciation (for many) of what nature has provided us with as a backyard. Many of our divers haven't dived for a number of years, hence all our dive team are experienced local instructors and very focused on putting smiles on peoples' faces.”

“The certifying agencies should start marketing to divers that were certified more than 10 years ago who have not have any recent CON-ED certs and encourage them to do so.”

“Dive packages!!!!!!! Specific packages to help them update their outdated equipment and specific locations that give them the best bang for their buck in travel. Next year when this COVID stuff is about over travel is going to boom and if we think about it now and do things to take advantage of this it'll help bring the dive industry back next year.”



IX. Responses by Category & Geolocation _____

Tabulations for all questions by the following:

Dive Retailers and Independent Instructors (regardless of location) (179 Responses)

Top 31 responses for all questions, from most reported to least:

All responses codes

Internet Sales / Online Sales / Amazon
Lack of Quality Instructors or Better Training Needed
More Publicity / Visibility / Advertising
Economy related issues / Need
Vaccine / COVID / Pandemic / Travel Restriction Issues
Make the Sport Cool / Fun / Easier / Exciting
Engage Kids or Market to Next Generation
Push or Promote local diving
More Affordable / Lower Prices for participation
Competing Other Sports / Activities
Promote as Adventure Activity
Misperception About the Sport
Offer Refresher courses / deal / free / low cost
Call or Reach Out to Inactive Customers
Need Better Industry Cooperation
Sell Sport as Ocean Advocates
Discounting or Stop Discounting to Improve Profits
Promote Sport as Social Activity & Lifestyle
Sell or promote Travel More
Market to the Older Divers / Generations - not younger
Better Dive Shop Standards of Operation / Need Business Training
Manufacturer competing / direct selling
Need Icons like Jacques / Sea Hunt in today's media
Support Local Dive Store
Government Leadership / Bureaucracy / Regulation Issues

All combined

Mentioned 57 times
Mentioned 43 times
Mentioned 44 times
Mentioned 38 times
Mentioned 35 times
Mentioned 33 times
Mentioned 37 times
Mentioned 35 times
Mentioned 28 times
Mentioned 23 times
Mentioned 20 times
Mentioned 20 times
Mentioned 19 times
Mentioned 20 times
Mentioned 18 times
Mentioned 18 times
Mentioned 15 times
Mentioned 17 times
Mentioned 14 times
Mentioned 14 times
Mentioned 14 times
Mentioned 14 times
Mentioned 13 times
Mentioned 13 times



More Social Media Marketing	Mentioned 11 times
Bucket List Mentality - been there done it	Mentioned 11 times
Lack of new students/customers	Mentioned 11 times
Changes in Consumer Habits	Mentioned 10 times
Manufacturer ordering issues/policies	Mentioned 10 times



Dive Resorts, Dive Travel Wholesalers/Agents & Liveboards (86 Responses)

Top 31 responses for all questions, from most reported to least:

All responses codes

Economy related issues/Need
Vaccine/COVID/Pandemic/Travel Restriction Issues
More Publicity/Visibility/Advertising
Lack of Quality Instructors or Better Training Needed
Government Leadership/Bureaucracy/Regulation Issues
Make the Sport Cool/Fun/Easier/Exciting
Engage Kids or Market to Next Generation
Sell Sport as Ocean Advocates
More Affordable/Lower Prices for participation
Environmental Issues/pollution/warming/reefs
Discounting or Stop Discounting to Improve Profits
Market saturation
Offer Refresher courses/deal/free/low cost
Hurricanes or Weather Issues
Push or Promote local diving
Need better travel deals/reduce costs
Need Better Industry Cooperation
Push More Continuing Education/Specialty Courses
Use Friends/Family to promote sport to others
More Social Media Marketing
Lack of new students/customers
Misperception About the Sport
Need Icons like Jacques/Sea Hunt in today's media
Sell or promote Travel More
Bucket List Mentality - been there done it
Training Agencies Should Advertise more
Promote as Adventure Activity
sell sport as relaxation and tranquility
Poor Customer Service
Market to the Older Divers/Generations - not younger

All combined

Mentioned 41 times
Mentioned 32 times
Mentioned 26 times
Mentioned 21 times
Mentioned 18 times
Mentioned 17 times
Mentioned 15 times
Mentioned 15 times
Mentioned 14 times
Mentioned 11 times
Mentioned 10 times
Mentioned 9 times
Mentioned 8 times
Mentioned 7 times
Mentioned 7 times
Mentioned 7 times
Mentioned 6 times
Mentioned 6 times
Mentioned 6 times
Mentioned 6 times
Mentioned 6 times
Mentioned 5 times
Mentioned 5 times
Mentioned 5 times
Mentioned 5 times
Mentioned 5 times
Mentioned 4 times



USA & Canada Responses Only (137 Responses)

Top 31 responses for all questions, from most reported to least:

All responses codes

Internet Sales/Online Sales/Amazon
More Publicity/Visibility/Advertising
Lack of Quality Instructors or Better Training Needed
Push or Promote local diving
More Affordable/Lower Prices for participation
Economy related issues/Need
Vaccine/COVID/Pandemic/Travel Restriction Issues
Make the Sport Cool/Fun/Easier/Exciting
Engage Kids or Market to Next Generation
Competing Other Sports/Activities
Offer Refresher courses/deal/free/low cost
Call or Reach Out to Inactive Customers
Promote as Adventure Activity
Need Better Industry Cooperation
Promote Sport as Social Activity & Lifestyle
Misperception About the Sport
Manufacturer competing/direct selling
Need Icons like Jacques/Sea Hunt in today's media
Bucket List Mentality - been there done it
Discounting or Stop Discounting to Improve Profits
Sell or promote Travel More
Market to the Older Divers/Generations - not younger
Better Dive Shop Standards of Operation/Need Business Training
Manufacturer ordering issues/policies
Support Local Dive Store
Sell Sport as Ocean Advocates
Continue DEMA's Try Diving Program/Pool or similar events
Training Agencies Should Advertise more

All combined

Mentioned 50 times
Mentioned 36 times
Mentioned 34 times
Mentioned 32 times
Mentioned 30 times
Mentioned 28 times
Mentioned 25 times
Mentioned 24 times
Mentioned 22 times
Mentioned 17 times
Mentioned 16 times
Mentioned 15 times
Mentioned 14 times
Mentioned 14 times
Mentioned 13 times
Mentioned 13 times
Mentioned 13 times
Mentioned 11 times
Mentioned 11 times
Mentioned 11 times
Mentioned 10 times
Mentioned 10 times
Mentioned 10 times
Mentioned 10 times
Mentioned 9 times
Mentioned 8 times
Mentioned 7 times
Mentioned 7 times



Changes in Consumer Habits
Lack of new students/customers

Mentioned 7 times
Mentioned 7 times



Non-USA/Canada Responses Only (184 Responses)

Top 31 responses for all questions, from most reported to least:

All responses codes

More Publicity / Visibility / Advertising
Economy related issues / Need
Vaccine / COVID / Pandemic / Travel Restriction Issues
Lack of Quality Instructors or Better Training Needed
Make the Sport Cool / Fun / Easier / Exciting
Sell Sport as Ocean Advocates
Engage Kids or Market to Next Generation
Need Better Industry Cooperation
Government Leadership / Bureaucracy / Regulation Issues
More Affordable / Lower Prices for participation
Environmental Issues / pollution / warming / reefs
Discounting or Stop Discounting to Improve Profits
Promote as Adventure Activity
Sell or promote Travel More
Push or Promote local diving
Lack of new students / customers
Misperception About the Sport
Internet Sales / Online Sales / Amazon
Offer Refresher courses / deal / free / low cost
Market saturation
More Social Media Marketing
Competing Other Sports / Activities
Hurricanes or Weather Issues
Aging Dive Consumer
Promote Sport as Social Activity & Lifestyle
Support Local Dive Store
Use Friends / Family to promote sport to others
Need better travel deals / reduce costs
Call or Reach Out to Inactive Customers
Market to the Older Divers / Generations - not younger

All combined

Mentioned 62 times
Mentioned 54 times
Mentioned 52 times
Mentioned 37 times
Mentioned 34 times
Mentioned 34 times
Mentioned 28 times
Mentioned 27 times
Mentioned 25 times
Mentioned 25 times
Mentioned 23 times
Mentioned 20 times
Mentioned 19 times
Mentioned 18 times
Mentioned 18 times
Mentioned 16 times
Mentioned 16 times
Mentioned 15 times
Mentioned 15 times
Mentioned 13 times
Mentioned 13 times
Mentioned 13 times
Mentioned 12 times
Mentioned 12 times
Mentioned 12 times
Mentioned 10 times
Mentioned 10 times
Mentioned 9 times
Mentioned 9 times



Manufacturers, Media, Training Agencies & 'Other' Dive Professionals (53 Responses)

Top 31 responses for all questions, from most reported to least:

All responses codes	All combined
More Publicity / Visibility / Advertising	Mentioned 22 times
Lack of Quality Instructors or Better Training Needed	Mentioned 17 times
Need Better Industry Cooperation	Mentioned 13 times
Make the Sport Cool / Fun / Easier / Exciting	Mentioned 9 times
Sell Sport as Ocean Advocates	Mentioned 9 times
Lack of new students / customers	Mentioned 8 times
Engage Kids or Market to Next Generation	Mentioned 8 times
Promote Sport as Social Activity & Lifestyle	Mentioned 8 times
Push or Promote local diving	Mentioned 7 times
Sell or promote Travel More	Mentioned 7 times
Aging Dive Consumer	Mentioned 7 times
Promote as Adventure Activity	Mentioned 7 times
Environmental Issues / pollution / warming / reefs	Mentioned 7 times
More Affordable / Lower Prices for participation	Mentioned 5 times
Cross-Market to other activities	Mentioned 5 times
Manufacturer competing / direct selling	Mentioned 5 times
Internet Sales / Online Sales / Amazon	Mentioned 5 times
Discounting or Stop Discounting to Improve Profits	Mentioned 5 times
Support Local Dive Store	Mentioned 5 times
More Strategic Market Research	Mentioned 4 times
Competing Other Sports / Activities	Mentioned 4 times
Younger Generation Not interested in Sport	Mentioned 4 times
Call or Reach Out to Inactive Customers	Mentioned 3 times
Continue DEMA's Try Diving Program / Pool or similar events	Mentioned 3 times
Stop Marketing Sport for Everyone	Mentioned 3 times



Need better travel deals/reduce costs	Mentioned 3 times
Promote Healthy Aspect of Sport	Mentioned 3 times
Misperception About the Sport	Mentioned 3 times
No Swimming Pool(s)	Mentioned 3 times



Appendix A: All Coded Responses

All of the entire 86 possible coded responses are listed below. Many of these only had one or two responses, but some of the comments are interesting (in order from most to least mentioned for all four questions, 1,236 total responses):

All responses codes

More Publicity / Visibility / Advertising
Lack of Quality Instructors or Better Training Needed
Economy related issues / Need
Vaccine / COVID / Pandemic / Travel Restriction Issues
Internet Sales / Online Sales / Amazon
Make the Sport Cool / Fun / Easier / Exciting
Engage Kids or Market to Next Generation
More Affordable / Lower Prices for participation
Push or Promote local diving
Sell Sport as Ocean Advocates
Need Better Industry Cooperation
Promote as Adventure Activity
Discounting or Stop Discounting to Improve Profits
Competing Other Sports / Activities
Government Leadership / Bureaucracy / Regulation Issues
Offer Refresher courses / deal / free / low cost
Environmental Issues / pollution / warming / reefs
Sell or promote Travel More
Misperception About the Sport
Promote Sport as Social Activity & Lifestyle
Lack of new students / customers
Call or Reach Out to Inactive Customers
Support Local Dive Store
Need Icons like Jacques / Sea Hunt in today's media
Market saturation
More Social Media Marketing
Market to the Older Divers / Generations - not younger

All combined

Mentioned 98 times
Mentioned 86 times
Mentioned 81 times
Mentioned 66 times
Mentioned 62 times
Mentioned 58 times
Mentioned 55 times
Mentioned 51 times
Mentioned 42 times
Mentioned 41 times
Mentioned 35 times
Mentioned 34 times
Mentioned 33 times
Mentioned 33 times
Mentioned 32 times
Mentioned 31 times
Mentioned 30 times
Mentioned 29 times
Mentioned 26 times
Mentioned 25 times
Mentioned 25 times
Mentioned 21 times
Mentioned 20 times
Mentioned 20 times
Mentioned 19 times
Mentioned 19 times



Better Dive Shop Standards of Operation/Need Business Training	Mentioned 19 times
Manufacturer competing/ direct selling	Mentioned 19 times
Hurricanes or Weather Issues	Mentioned 17 times
Bucket List Mentality - been there done it	Mentioned 17 times
Use Friends/Family to promote sport to others	Mentioned 17 times
Need better travel deals/ reduce costs	Mentioned 15 times
Aging Dive Consumer	Mentioned 14 times
Training Agencies Should Advertise more	Mentioned 13 times
Continue DEMA's Try Diving Program/ Pool or similar events	Mentioned 12 times
Poor Customer Service	Mentioned 11 times
Push More Continuing Education/ Specialty Courses	Mentioned 11 times
Changes in Consumer Habits	Mentioned 11 times
Cross-Market to other activities	Mentioned 10 times
Manufacturer ordering issues/ policies	Mentioned 10 times
sell sport as relaxation and tranquility	Mentioned 9 times
More Strategic Market Research	Mentioned 9 times
More local public access to diving	Mentioned 8 times
Make the Sport fashionable & sexy	Mentioned 7 times
Younger Generation Not interested in Sport	Mentioned 7 times
Lower Training Agency Fees or Renewals	Mentioned 6 times
Stop Using Social Media to Reach People	Mentioned 6 times
Stop e-learning	Mentioned 5 times
Stop Marketing Sport for Everyone	Mentioned 5 times
Promote Healthy Aspect of Sport	Mentioned 5 times
No Swimming Pool(s)	Mentioned 5 times
Lack of interest in local diving	Mentioned 5 times
Partner with Local Schools to Promote Diving	Mentioned 5 times
Offer Free/ No Cost Dive Trip	Mentioned 5 times
Stop Independent Instructors	Mentioned 4 times
Apathy or Complacency Among Industry Partners	Mentioned 4 times
Encourage Clubs/ Group Participation	Mentioned 4 times
Lack of Airlift and or Accommodations	Mentioned 4 times



High Cost of Shipping/Logistics Issues	Mentioned 4 times
Better Pay for Staff/Instructors	Mentioned 3 times
DEMA needs to form new company to promote diving and align with other adventure associations	Mentioned 3 times
Lobby Decision Makers/Government	Mentioned 3 times
Insurance costs too high	Mentioned 3 times
Limitations of Training Ratios	Mentioned 3 times
Better Cust Service From Training Agencies	Mentioned 3 times
Poor Physical Condition of Divers Today	Mentioned 3 times
Relationship between dive center/agency needs change	Mentioned 3 times
Create Incentives for shops to reach out to inactive divers	Mentioned 3 times
Training Costs Too High	Mentioned 3 times
More Women/Females in Sport	Mentioned 2 times
Get Rid of Old School Management/Thinking	Mentioned 2 times
Dissolve DEMA & Merge with Outdoor Retailer Assoc	Mentioned 2 times
Support Independent Instructors	Mentioned 2 times
Promote Affordability of Sport	Mentioned 2 times
Excessive Litigation	Mentioned 2 times
Promote Freediving	Mentioned 2 times
Create A Diver Mentoring Program for New Divers	Mentioned 2 times
Require Minimum # of Dives/time to Remain Active	Mentioned 2 times
Make DEMA Show Consumer & Trade	Mentioned 1 time
Stop Doing Resort Courses / DSD	Mentioned 1 time
Acquisition and growth	Mentioned 1 time
Fear	Mentioned 1 time
Lack of local Diving	Mentioned 1 time
Increase in Shark Attacks	Mentioned 1 time
No time on consumers part	Mentioned 1 time
Offer Free Digital Training to Encourage Return to Sport	Mentioned 1 time



Appendix B: Link to Download All Responses

The raw, full unedited report for all 1,236 open-ended response are listed on this [link](#) by the categories outlined in this survey:

<https://www.williamcline.com/wp-content/uploads/cline-opinion-survey-open-ended-only.xlsx>

Appendix C: Infographic Depiction of Responses





Top 10 Priority Issues Q2: Solutions to Threats

Category	GLOBAL ALL SEGMENTS	USA/CANADA	Non-USA/CANADA	RETAILERS & Instructors	RESORTS & TRAVEL	MFG, TRAINING, OTHER
Lack of Quality Training in Students or Instructors	1	2	1	2	2	1
Internet Competition, Online Sales, Amazon	2	1	10	1	10	15
Reduce the Cost of Participation / Make More Affordable	3	4	3	4	3	11
Need Industry Promotions & Advertising	4	5	5	3	5	3
Need Better Industry Cooperation	5	7	6	6	12	2
Government Leadership or Regulation Issues	6	15	2	9	1	59
Manufacturers Competing or Direct Selling	7	3	22	5	61	6
Support the Local Dive Store	8	9	9	7	28	22
Sell the Sport As Ocean Advocates	9	34	4	15	8	4
Engage Kids and Market to Next Generations	10	12	8	14	7	7

Q2) What do you think we should, as an industry, do to help curb, change or reverse this problem?
309 Responses, COVID & Weather issues removed.



Top 10 Priority Issues Q3: Ideas for Industry Expansion

Category	GLOBAL ALL SEGMENTS	USA/CANADA	Non-USA/CANADA	RETAILERS & Instructors	RESORTS & TRAVEL	MFG, TRAINING, OTHER
Need Industry Promotions & Advertising	1	1	1	1	1	1
Engage Kids and Market to Next Generations	2	2	4	2	3	4
Lack of Quality Training in Students or Instructors	3	5	2	3	2	2
Make the Sport Cool, Fun, Easier & Exciting	4	3	5	4	5	6
Sell the Sport As Ocean Advocates	5	19	3	12	4	3
Misperceptions About the Sport	6	9	8	5	7	16
Need Icons like Jacques/Sea Hunt in today's media	7	4	10	6	6	23
Promote as Adventure Activity	8	10	7	7	15	5
Need Better Industry Cooperation	9	11	6	11	8	7
More Social Media Marketing	10	21	9	16	9	12

Q3) How do you think, we as an industry, can attract more people to the sport?
307 Responses, COVID & Weather issues removed.



Top 10 Priority Issues Q4: How to Reach Inactive Divers

Category	GLOBAL ALL SEGMENTS	USA/CANADA	Non-USA/CANADA	RETAILERS & Instructors	RESORTS & TRAVEL	MFG, TRAINING, OTHER
Offer Refresher Courses, Deal, Free or Low Cost	1	2	3	1	3	10
Make the Sport Cool, Fun, Easier & Exciting	2	4	1	4	2	2
Push or Promote Local Diving	3	1	4	2	6	3
Call or Reach Out to Inactive Customers	4	3	5	3	15	6
Need Industry Promotions & Advertising	5	11	2	11	1	4
Sell or Promote Travel More	6	6	6	7	13	5
More Affordable, Lower Prices for Participation	7	5	10	5	12	17
Promote Sport as Social Activity & Lifestyle	8	7	7	10	25	1
Use Friends/Family to Promote Sport to Others	9	10	11	8	9	11
Engage Kids and Market to Next Generations	10	8	9	6	8	27

Q4) What do you think is the best way to bring inactive divers back to the sport?
301 Responses, COVID & Weather issues removed.



Cline's Dive Industry Sentiment Study Priority Issues

Category	Global	USA/Canada	Non-USA/Canada	RETAILERS & Instructors	RESORTS & TRAVEL	MFG, TRAINING, OTHER
More Publicity, Advertising or Promotions	98 mentions	37 mentions	62 mentions	44 mentions	32 mentions	22 mentions
Lack of Quality Training in Students or Instructors	86 mentions	34 mentions	52 mentions	43 mentions	26 mentions	17 mentions
Economy Related to COVID	81 mentions	81 mentions	54 mentions	38 mentions	41 mentions	2 mentions
Promote Local Diving & Local Retailer	72 mentions	41 mentions	30 mentions	50 mentions	15 mentions	12 mentions
Internet Competition, Online Sales, Amazon	68 mentions	51 mentions	16 mentions	57 mentions	4 mentions	5 mentions
Make the Sport Cooler, More Fun and Easier	62 mentions	25 mentions	37 mentions	35 mentions	18 mentions	9 mentions
Engage and Market to the Next Generations	58 mentions	24 mentions	34 mentions	33 mentions	17 mentions	8 mentions
Reduce the Cost of Participation / Make More Affordable	55 mentions	30 mentions	25 mentions	35 mentions	15 mentions	5 mentions

325 Responses, 1,236 Open Ended Responses Encompassing over 47 Countries Across all Stakeholder Groups of Our Global Dive Industry



Thank you for taking the time to read this very complicated and information-heavy document. My hope is that this will stimulate conversations that need to happen among our industry's stakeholder groups.

It is only with mutual cooperation and working together can we, as an industry, grow and change.

This study was created in-house and tabulated by William Cline.

Stay Safe and Healthy,

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

William Cline
President
Cline Group Advertising, Marketing & Research