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Diving in the Future

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By order of
Tauchsport-Industrieverband (tiv)

tiv

at Bundesverband
Wassersportwirtschaft e.V.

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1 Questionnaire Survey, Response Rate

On request by order of the Tauchsport-Industrieverband (tiv) in 2009 two actions have been started in parallel with identical questionnaires:

- Written form of questionnaire in store diving shops,
- Online questionnaire on the home page of http://www.tauchsportindustrieverband.de

Included in the questionnaire are the following 12 categories of queries:

1. Residence
2. Year of birth
3. Gender
4. Family status, number of children
5. Year of first diving instruction
6. Status of education today
7. Type of equipment owned
8. Number of dives in total 2008, planned for 2009
9. Year of last dive
10. Other hobbies
11. Value of current diving equipment
12. Average of annual investments for diving trips, courses and further training, diving equipment.

Response rate and recording until 12.10.2009:

- Written questionnaires: 243
- Online questionnaires: 629

In total 872

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

2 Expansion of Collected Statistics to Real Figures

To test for relevance, for the purpose of extrapolation of the results towards actual data sets, the following reference data were available:

- Particulars of age and gender of first-time education at multiple training centers in 2007 and 2008.
- Additional estimates to the market shares of analyzed data.
- Summarized sales data of German diving companies for 2007 and 2008.

A comparison of the structures in age and gender of the participants on initial training in 2007 and 2008 between the collected data and the data from training centers showed:

- A slight increase in male attendees
- A decrease of older divers (> 50) as well as of younger divers (< 20) attending the survey.

For the forecast this imbalance has been adjusted by corresponding correction factors for each questionnaire.

The calculation of the collected statistic factors (percentage of the real amount and the appropriate number of cases) was performed according up to the following information:

1. According to the input from training associations a group of experts concluded that worldwide per annum

   approx. 39.000 German divers receive initial training.

2. An expert estimate of total sales in diving equipment demand for Germany shows a volume of

   approx. 85.000.000 €/year.

3. Decision is made for the following report to distinguish between

   "Scuba Divers" (with own complete equipment)
   "Leisure Divers" (without own complete equipment).

   In this survey participants were classified as **“scuba diver”** if they stated to own complete diving equipment (warm water or cold water).

   The participants were classified as **“leisure diver“** if they stated to own no or just partial personal diving equipment. Due to the fact that these persons attended the survey it was assumed that they do visit diving shops and that they are active divers.

Not recorded in this survey are **"Infrequent divers"** with initial training who presumably do not own noteworthy personal equipment, do not buy at specialized diving shops but possibly use diving attractions on vacation.

Taken into account, that more than 1.2 Million Germans have passed an initial diving instruction, it can be estimated, that "Infrequent divers" represent a group of about 300,000 persons in addition to the sum of approx. 420,000 active divers (see below).

4. According to the data of previous 10 years there is an remarkably stable proportion of entrants of first instructions and persons leaving (drop out of active diving).

   The annual transfer rate

   "Proportion of new entrants to present" = "Proportion of persons leaving to present"

   (see below):

Scuba divers with own equipment:	approx. 8,5 %
Leisure divers without own equipment	approx. 10%

5. Out of the statements of interviewees the following data are derived:

Average of one-off expenses for the own diving equipment:	2.500 €
Average of annual expenses of divers with own equipment	250 €/Year

6. From an iterative adjustment it follows that per annum

   approx. 16,000 future scuba divers with own equipment

   approx. 23,000 future leisure divers without own equipment

   will be instructed.

7. Based on the data the following total of German divers were calculated:

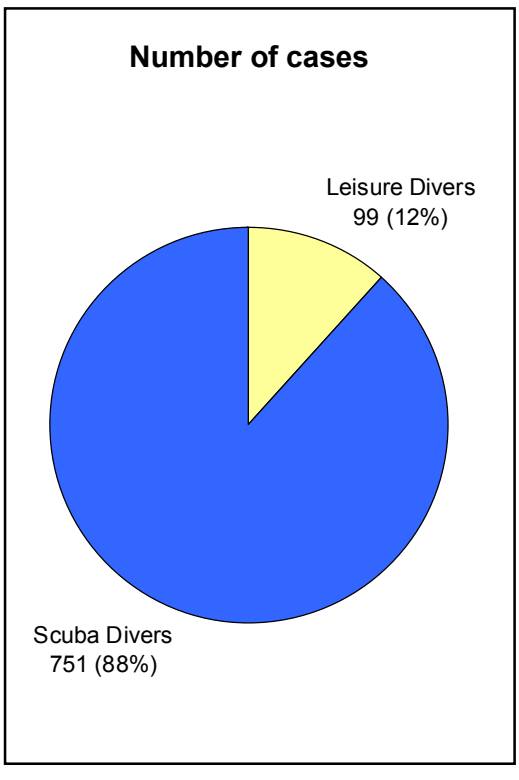
   approx. 190,000 scuba divers with own equipment

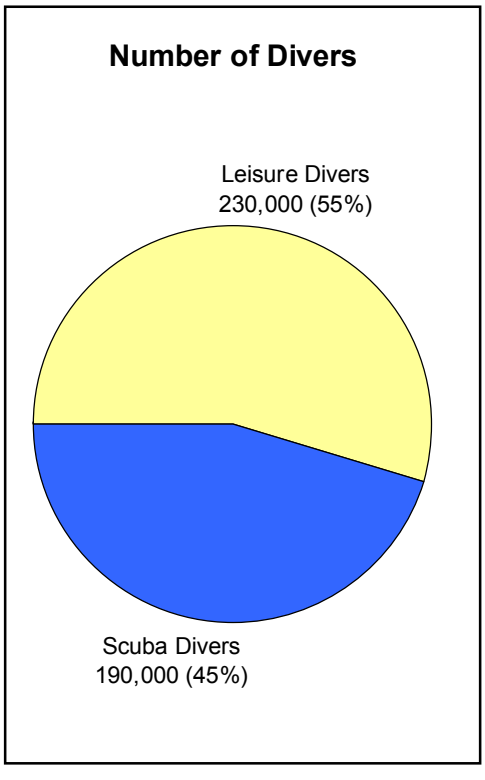
   approx. 230,000 leisure divers without own equipment

   In total:
   approx. 420,000 active divers.

The result of analyzing the questionnaire per categories “scuba divers“ and “leisure divers“ shows the quantity factors for both categories as follows:

Equipment yes / no	Cases	Number of divers	Quantity factor
Leisure divers	99	230,000	2,333
Scuba divers	751	190,000	253





Remarks:

- Predominantly more “scuba divers“ participated in the poll.
- Due to the small sample size of leisure divers only rough estimates could be made for this group.

3 Distribution at Age and Gender

Number of divers projected

	Scuba divers		Total
Age Group	**m**	**w**	
15 to 19	3,806	2,328	6,134
20 to 24	7,136	4,365	11,501
25 to 29	11,727	7,421	19,148
30 to 34	14,153	8,163	22,316
35 to 39	20,488	6,076	26,564
40 to 44	26,076	8,355	34,431
45 to 49	21,242	8,017	29,259
50 to 54	17,270	4,482	21,751
55 to 59	9,896	1,862	11,758
60 to 64	4,163		4,163
65 to 69	2,973		2,973
Total	**138,930**	**51,070**	**190,000**

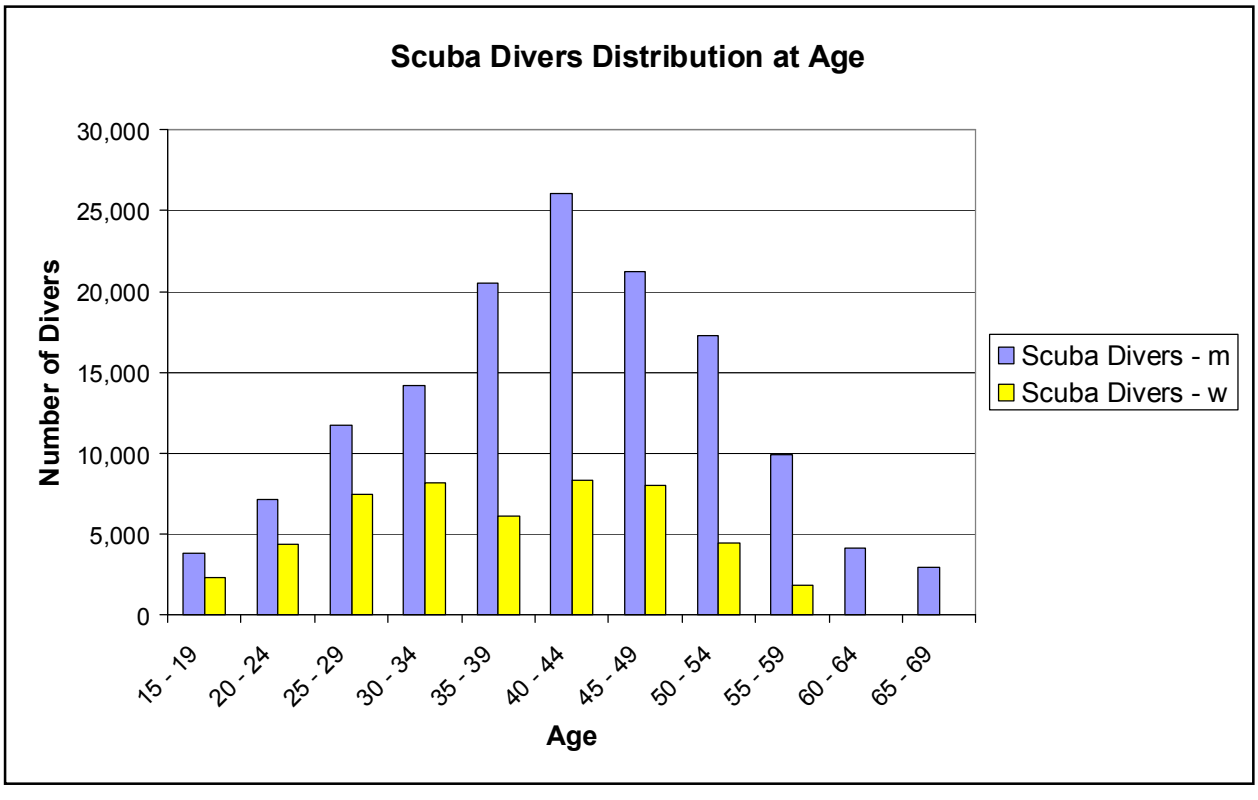
	Leisure Divers		Total
Age Group	**m**	**w**	
10 to 14	28,513		28,513
15 to 19	13,160	16,100	29,260
20 to 24	16,450	4,025	20,475
25 to 29	20,508	22,808	43,316
30 to 34	20,508	6,842	27,350
35 to 39	19,082	11,672	30,754
40 to 44	17,174	2,334	19,508
45 to 49	18,753		18,753
50 to 54	4,825	2,952	7,777
55 to 59		4,293	4,293
Total	**158,972**	**71,028**	**230,000**

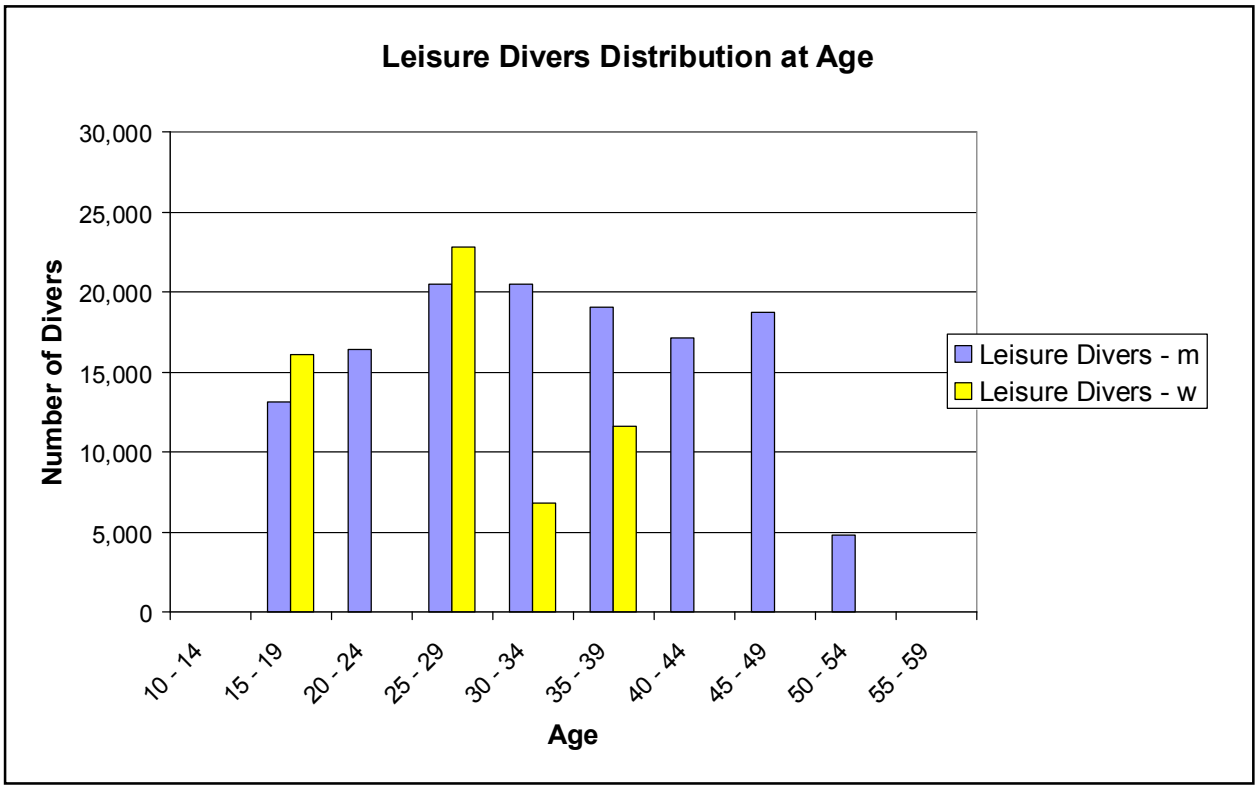
Distribution by gender:

- Scuba divers: Men: 73%
  Women: 27%
- Considering the small number of cases:
  Leisure divers: Men: 69%
  Women: 31%

Largest age group:

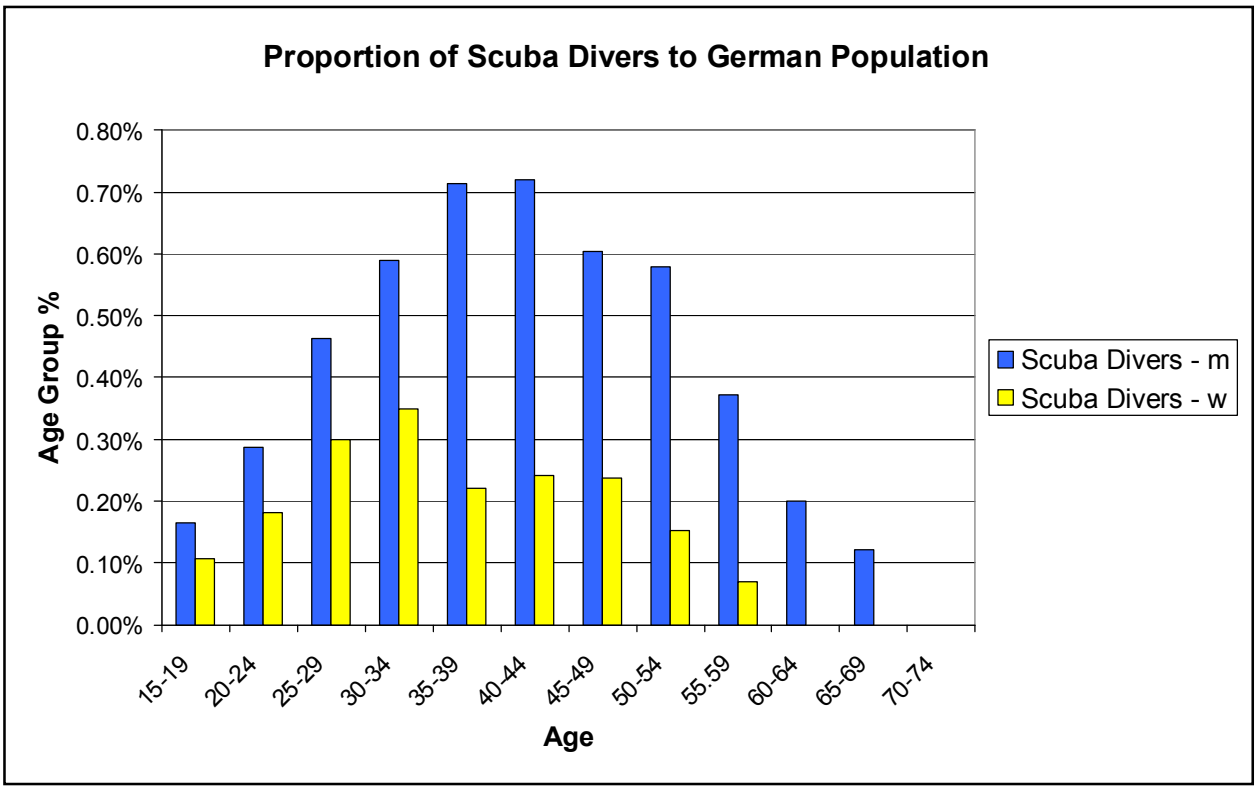
- Scuba divers: Men: 35 - 50 years, average age: 40 years
  Women: 25 - 50 years, average age: 35 years
- Considering the small sample size:
  Leisure divers: Men: 25 - 50 years, average age: 31 years


Scuba Divers Distribution at Age
Number of Divers
30,000
25,000
20,000
15,000
10,000
5,000
0
15 - 19
20 - 24
25 - 29
30 - 34
35 - 39
40 - 44
45 - 49
50 - 54
55 - 59
60 - 64
65 - 69
Age
Scuba Divers - m
Scuba Divers - w

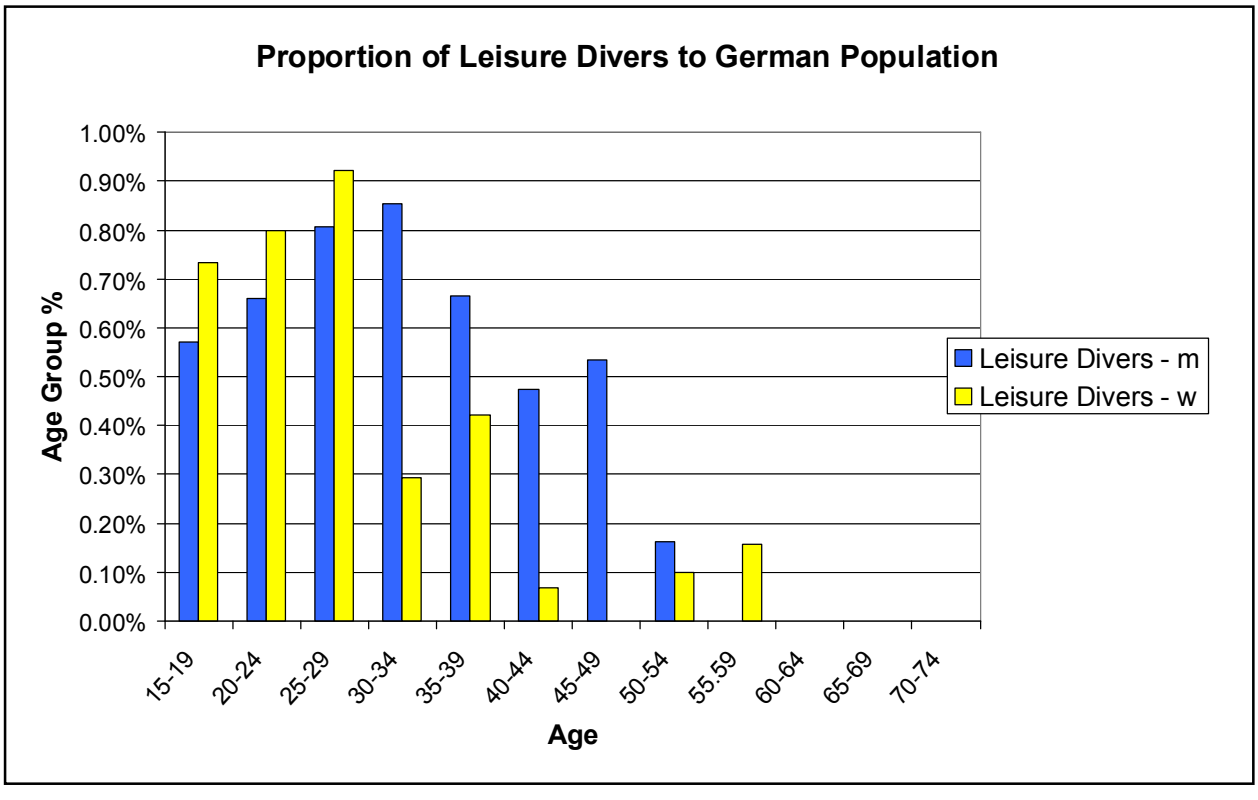

Leisure Divers Distribution at Age
Number of Divers
30,000
25,000
20,000
15,000
10,000
5,000
0
10 - 14
15 - 19
20 - 24
25 - 29
30 - 34
35 - 39
40 - 44
45 - 49
50 - 54
55 - 59
Age
Leisure Divers - m
Leisure Divers - w

4 Proportion of Divers to Population

	Share of the Population %			
Age Group	Scuba divers m	Scuba divers w	Leisure divers m	Leisure divers w
15to19	0.17%	0.11%	0.57%	0.73%
20to24	0.29%	0.18%	0.66%	0.17%
25to29	0.46%	0.30%	0.81%	0.92%
30to34	0.59%	0.35%	0.85%	0.29%
35to39	0.71%	0.22%	0.66%	0.42%
40to44	0.72%	0.24%	0.47%	0.07%
45to49	0.60%	0.24%	0.53%	0.00%
50to54	0.58%	0.15%	0.16%	0.10%
55.59	0.37%	0.07%	0.00%	0.16%
60to64	0.20%	0.00%	0.00%	0.00%
65to69	0.12%	0.00%	0.00%	0.00%
70to74	0.00%	0.00%	0.00%	0.00%

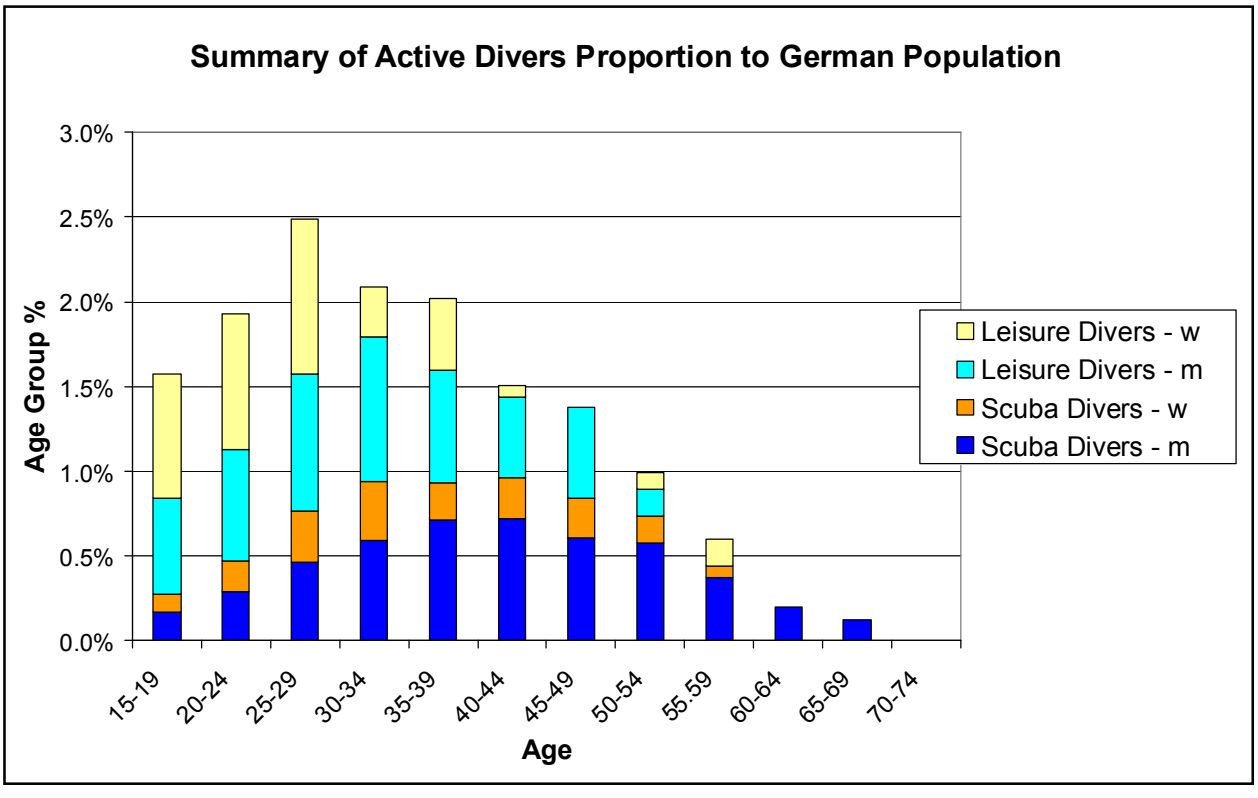


- Scuba diving occurs at most
  for men of the age group 35-45 in approximately 0.7%,
- for women of the age group 30-34 in approximately 0.35%.



- Considering the small sample sizes:

  Largest age groups of population:
  Men: 25-35 years with 0.8 - 0.9%
  Women: 20-30 years with 0.8 - 0.9%



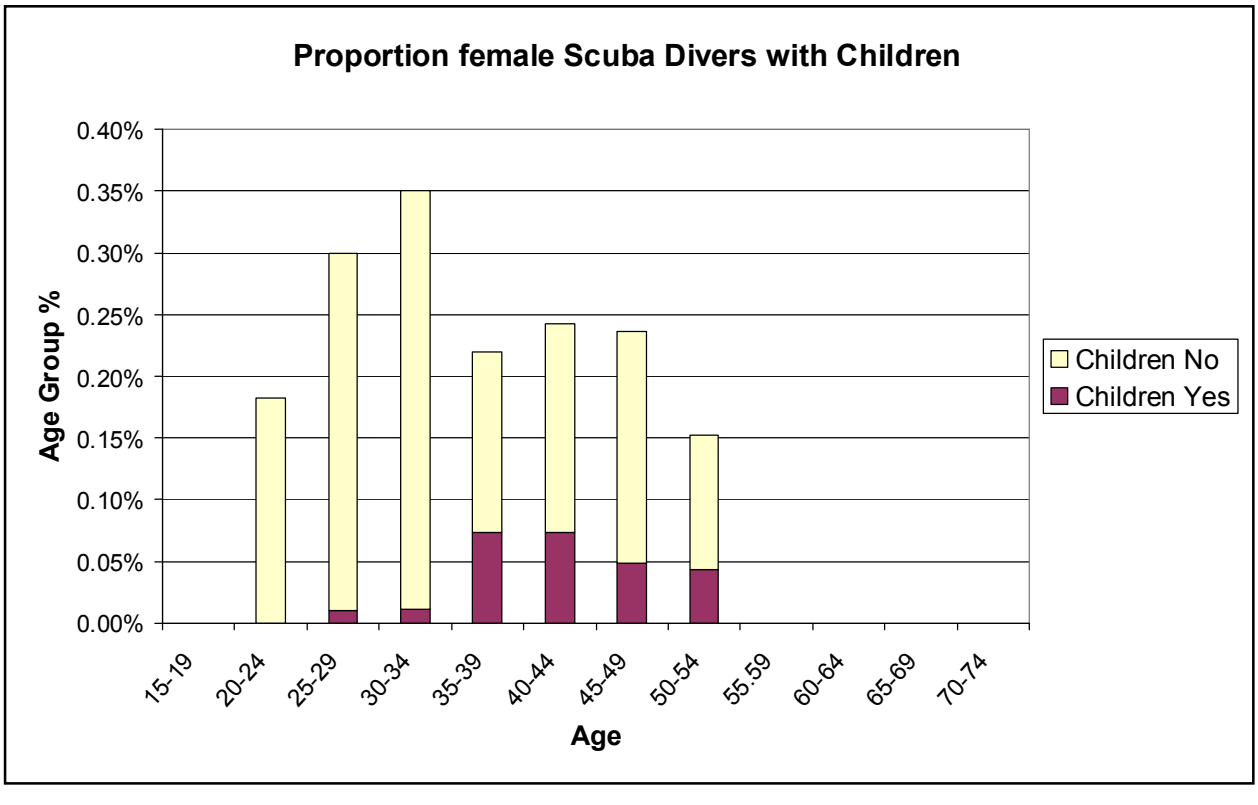
Summary:

- The proportion of divers to population is with 2.5% strongest among the age group 25-29 but continuously shows a steady decrease with growing age of divers (age group 40-44: 1.5%, age group 50-54: 1%).
- There is a high proportion of women (approx. 50%) among younger divers < 30.

4.1 Women with Children

The statistics of female scuba divers show a significant decrease starting from the age group of 35.
Question: Does this relate to the family structure?

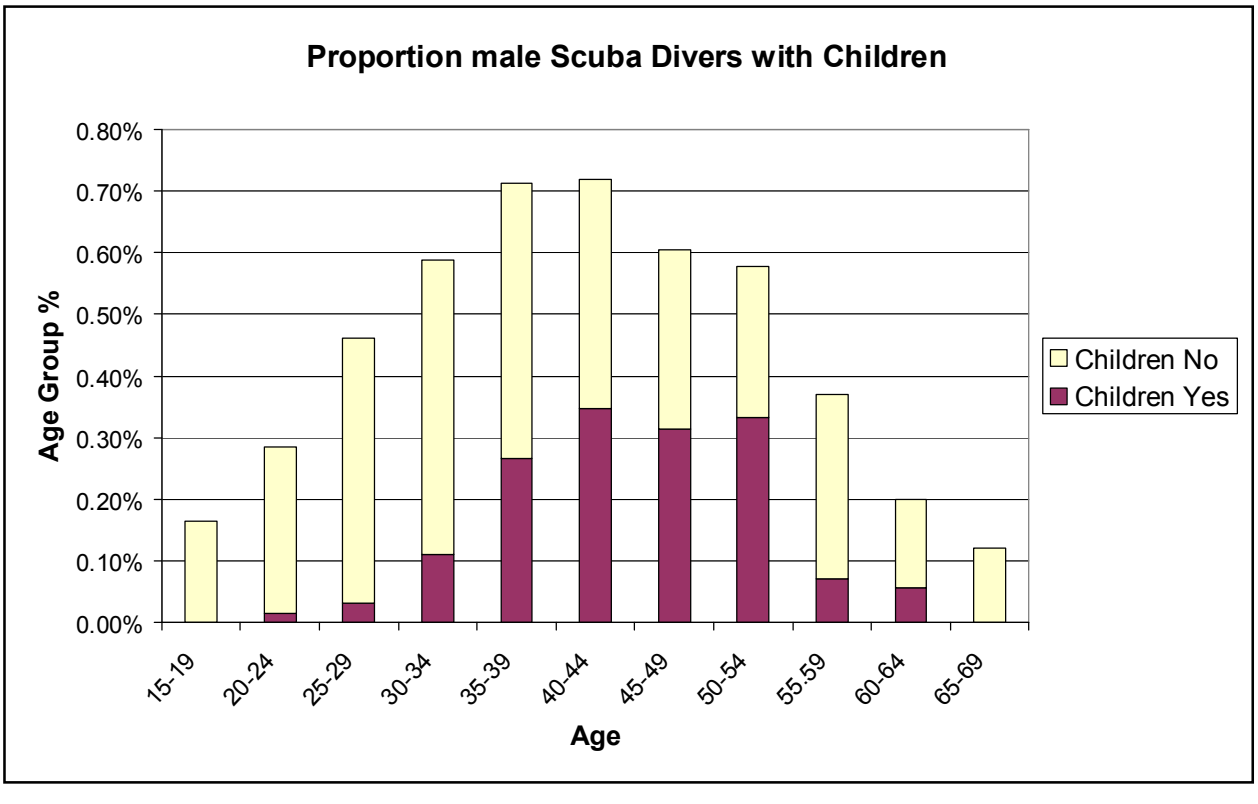
	Proportion of female Scuba Divers to Population	
Age Group	**Children yes**	**Children no**
15to19		
20to24	0.00%	0.18%
25to29	0.01%	0.29%
30to34	0.01%	0.34%
35to39	0.07%	0.15%
40to44	0.07%	0.17%
45to49	0.05%	0.19%
50to54	0.04%	0.11%



- The proportion of female scuba divers shows a drop of about one-third after they give birth to children.

4.2 Men with Children

	Proportion of male Scuba Divers to Population	
Age-group	**Children yes**	**Children no**
15to19	0.00%	0.17%
20to24	0.01%	0.27%
25to29	0.03%	0.43%
30to34	0.11%	0.48%
35to39	0.27%	0.45%
40to44	0.35%	0.37%
45to49	0.31%	0.29%
50to54	0.33%	0.25%
55.59	0.07%	0.30%
60to64	0.06%	0.14%
65to69	0.00%	0.12%

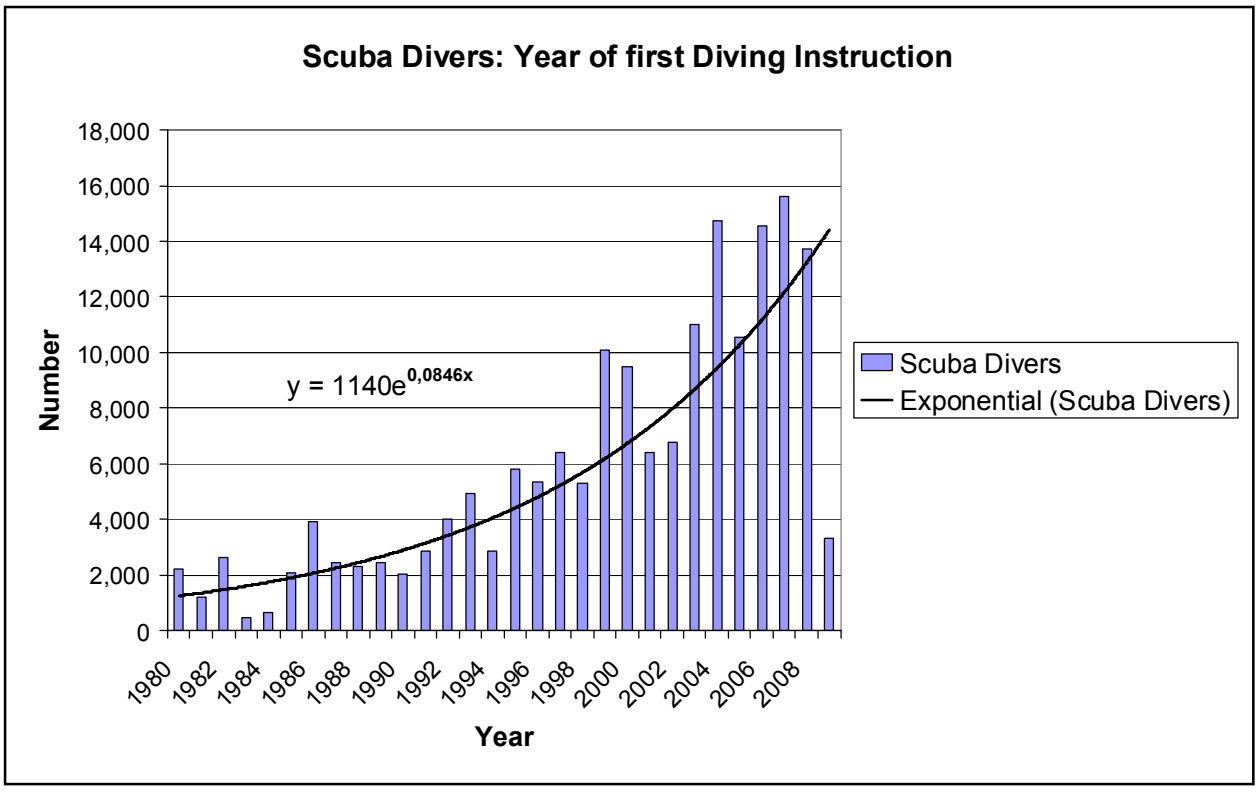


- Although 50% of male scuba divers of 40 to 55 years raise children a downward movement corresponding to females is indiscernible.

5 Year of First Diving Instruction

5.1 Scuba Divers

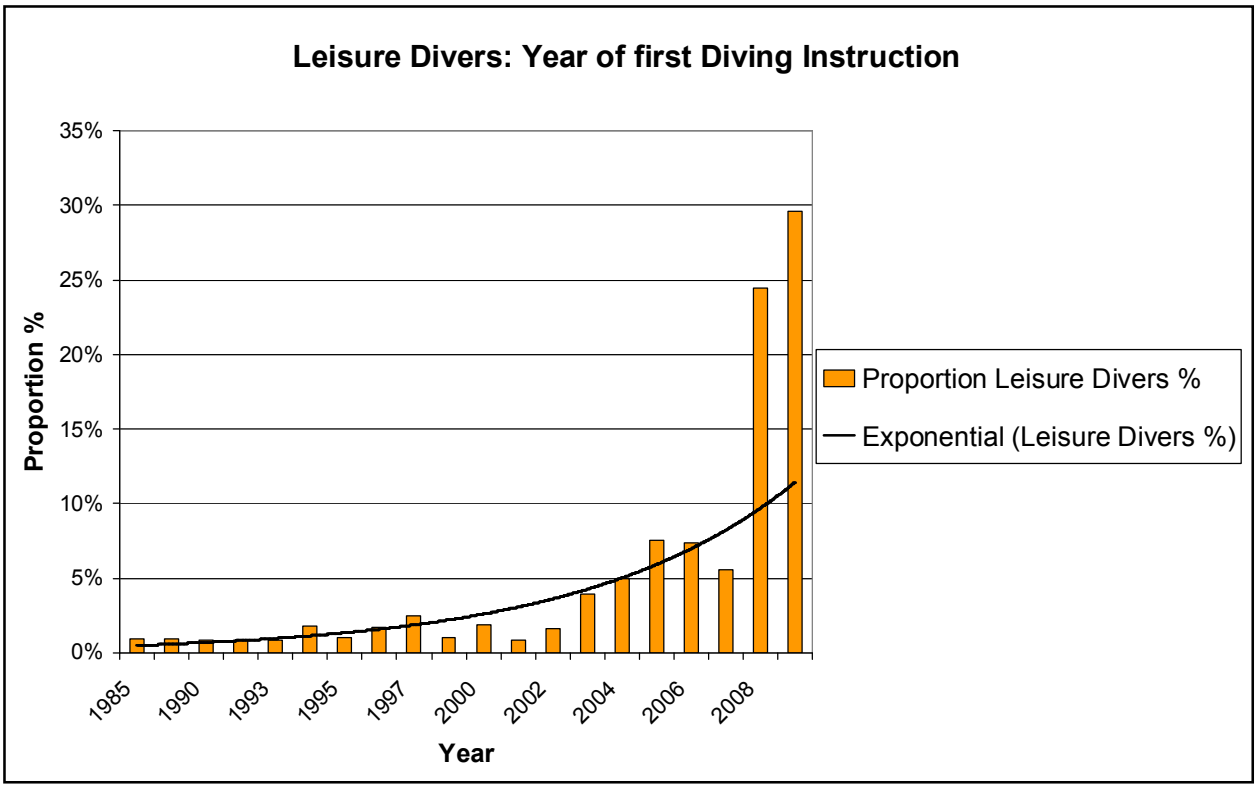
The following graph shows how many of today's scuba divers passed their initial training in which year.



The trend line for scuba divers on the time scale of initial training allows the following conclusion:

- Approx. 16,000 future scuba divers are trained p.a.
- The proportion of dropouts amounts to approx. 8.5% p.a.
- Approx. 1 to 2 years after their first instruction divers become eventually scuba divers (by supplying their own complete equipment).

5.2 Leisure Divers



We have to consider for the survey results for leisure divers that a good portion of this group supposedly visits specialized shops shortly after the initial training (and therefore has been informed about the survey).

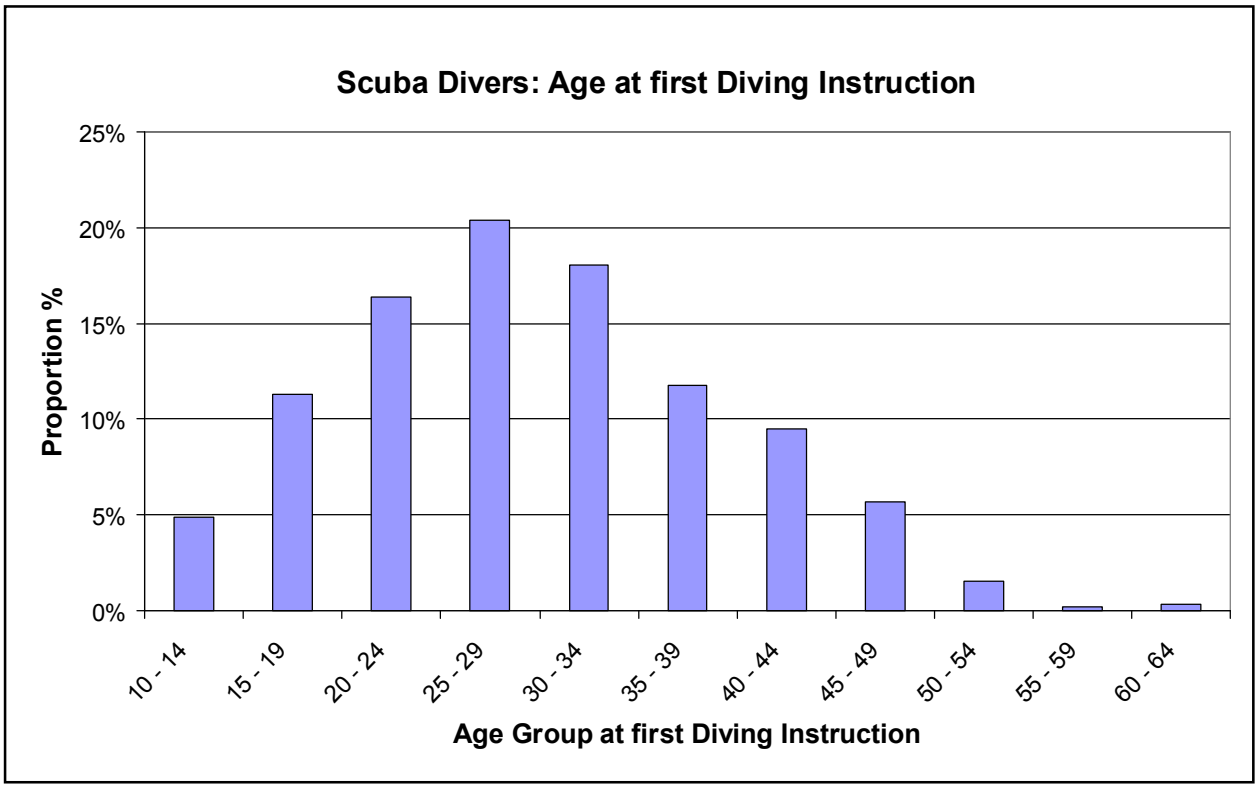
The trend line suggests the following behavior of this group:

- In the first years after initial training the "new" leisure divers visit specialized shops presumably to buy basic components of partial equipment.
- About 50% of future leisure divers are no longer visible in specialized shops after approx. 3 years after to the initial training.
- The remaining 50% stay in contact with specialized shops; the dropout rate averages approx. 10% p.a.

6 Age at First Diving Instructions

6.1 Scuba Divers

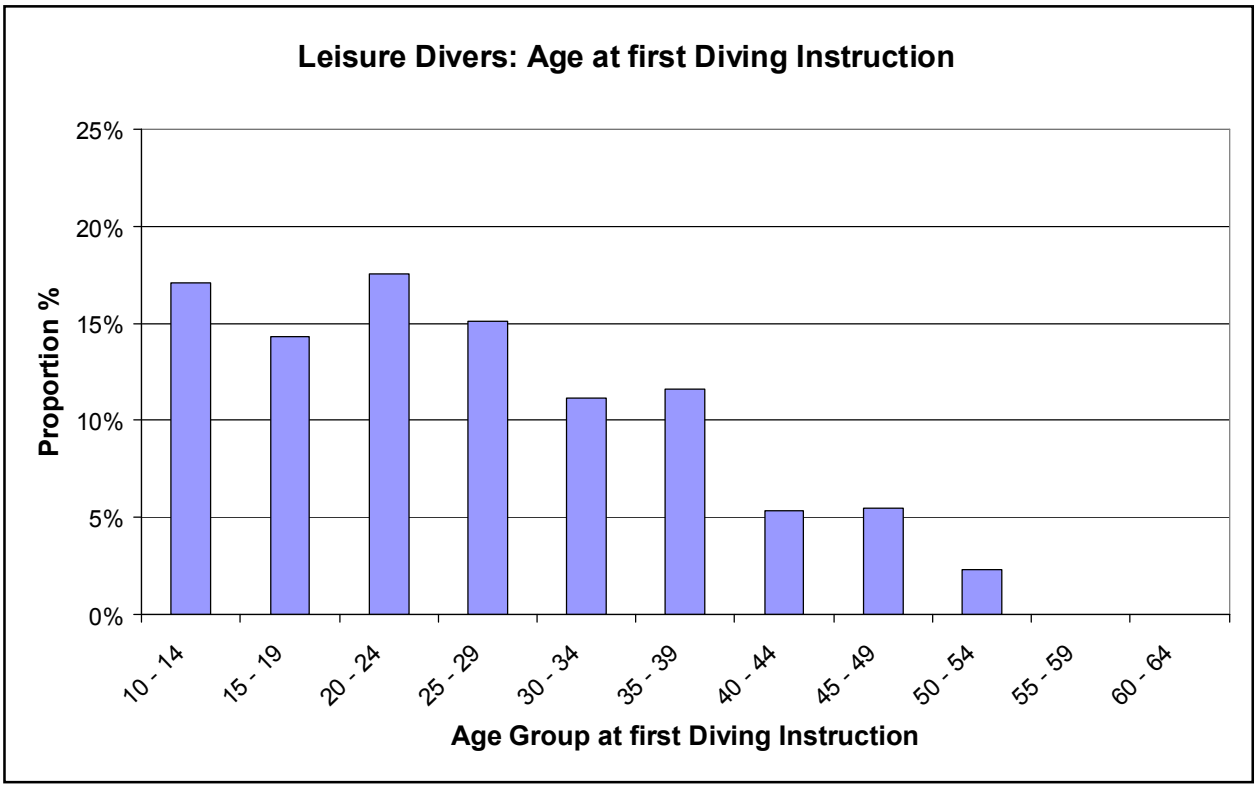
	Proportion %	Number of cases
Age-group at training	Scuba Divers	Scuba Divers
10 to 14	4.9%	31
15 to 19	11.3%	74
20 to 24	16.4%	124
25 to 29	20.4%	169
30 to 34	18.1%	146
35 to 39	11.7%	91
40 to 44	9.5%	71
45 to 49	5.7%	37
50 to 54	1.5%	8
55 to 59	0.2%	1
60 to 64	0.3%	1
Total	**100.0%**	**753**



- Scuba divers pass initial training at the age of 20 to 35.
  The proportion of initial trainings beyond to 50th birthday is very small.

6.2 Leisure Divers

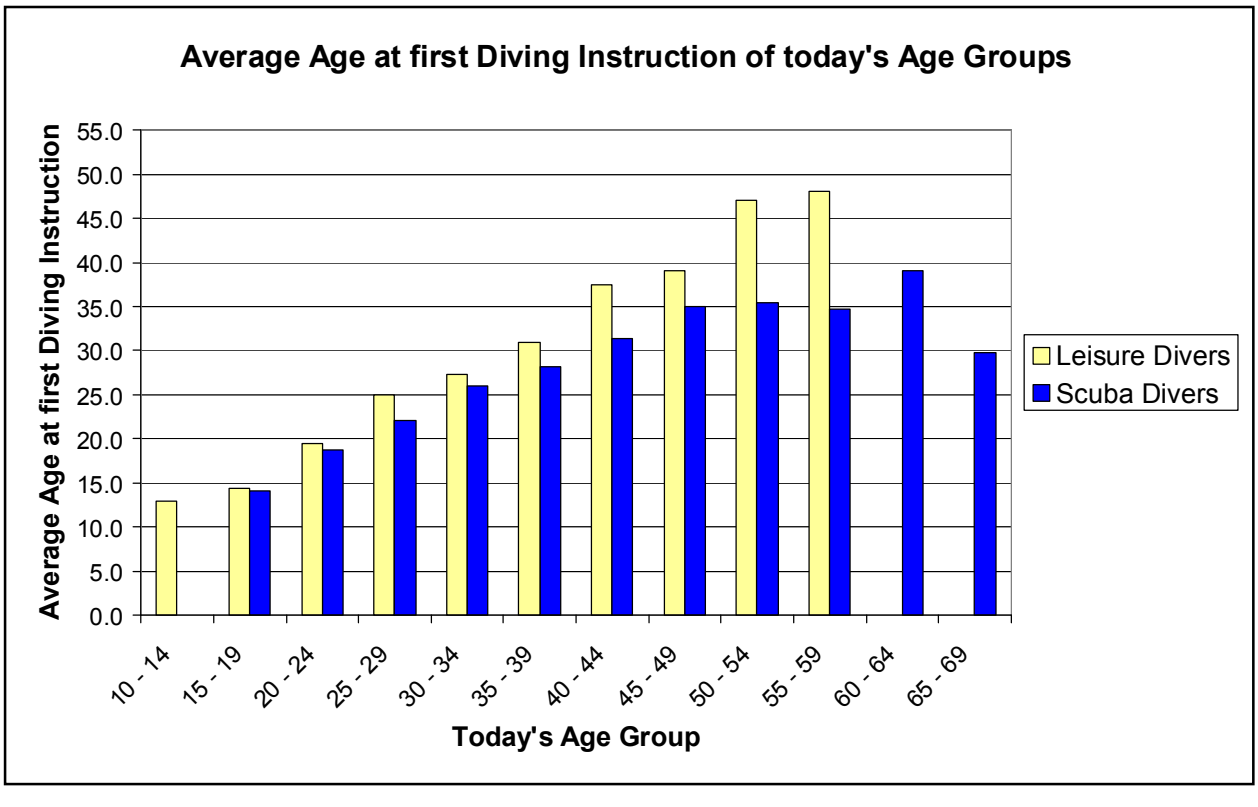
	Proportion %	Number of cases
Age-group at training	Leisure Divers	Leisure Divers
10 to 14	17.1%	3
15 to 19	14.3%	10
20 to 24	17.6%	18
25 to 29	15.1%	17
30 to 34	11.2%	13
35 to 39	11.6%	13
40 to 44	5.3%	6
45 to 49	5.5%	5
50 to 54	2.3%	2
55 to 59	0.0%	
60 to 64	0.0%	
Total	**100.0%**	**87**



- Considering the small sample sizes and the observation that leisure divers are no longer visible after a few years past to their initial training: Nearly 90% of initial trainings take place prior to the 40th birthday roughly equally distributed over the age groups including adolescents.

6.3 Average age at initial training of today's age groups

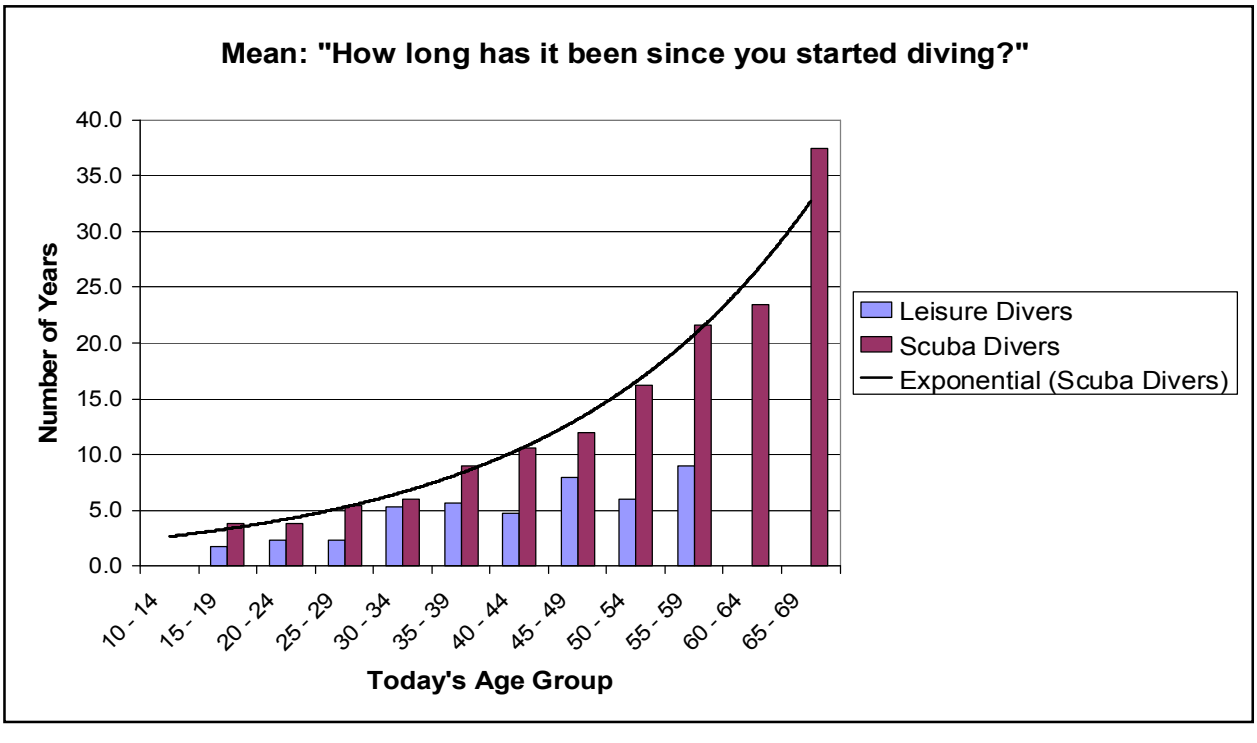
Averaged age at initial training			
Today's age group	**Leisure Divers**	**Scuba Divers**	**Average**
10 to 14	13.0		13.0
15 to 19	14.3	14.1	14.2
20 to 24	19.5	18.7	18.9
25 to 29	25.0	22.0	22.6
30 to 34	27.3	26.1	26.2
35 to 39	31.0	28.1	28.4
40 to 44	37.5	31.4	31.7
45 to 49	39.1	35.0	35.3
50 to 54	47.0	35.4	35.9
55 to 59	48.0	34.8	35.2
60 to 64		39.0	39.0
65 to 69		29.8	29.8
Average	**29.1**	**29.5**	**29.4**



- Today's scuba divers normally completed their initial training prior to an age of 35 even in the older age-group.
- For leisure divers the rising curve shows. that with all of today's age-groups only leisure divers with an initial training in the past few years are visible.

6.4 How long has it been since you started diving?

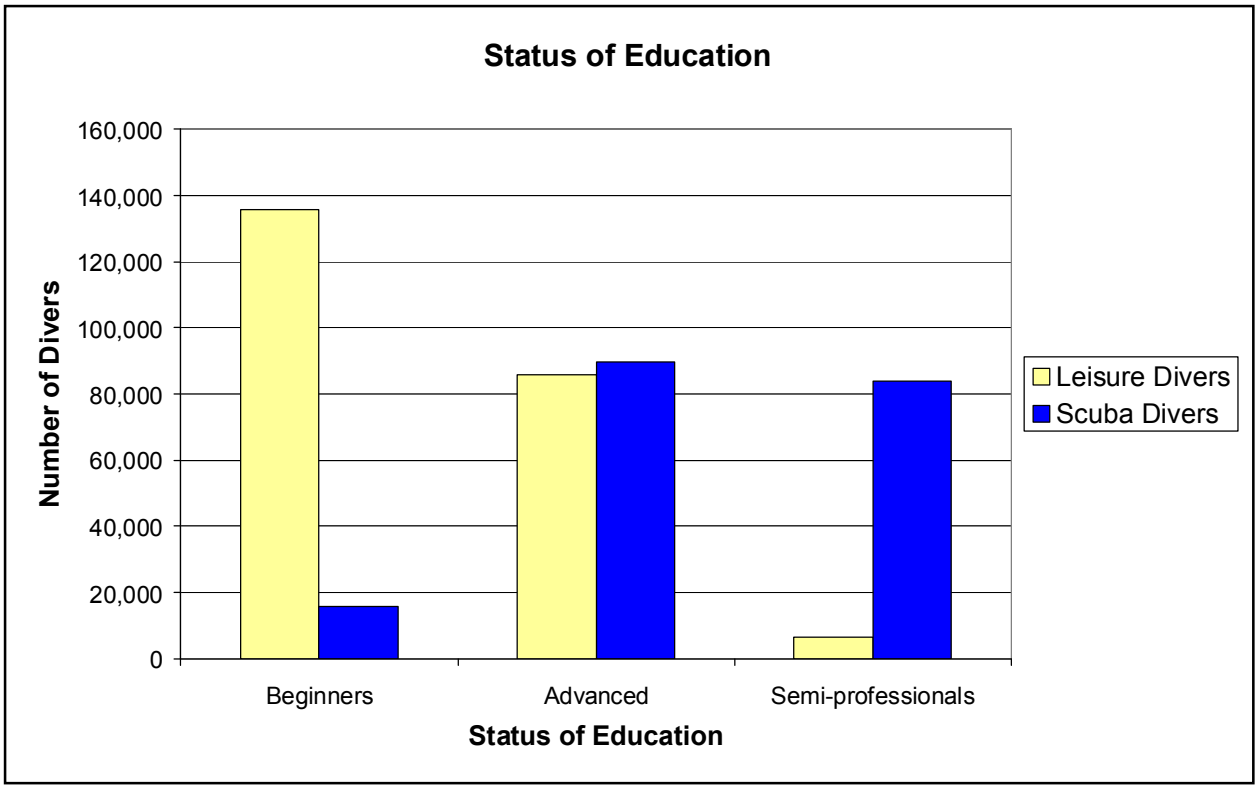
Average years of diving experience already			
Today's age-group	Leisure Divers	Scuba Divers	Average
10 to 14	0.0		0.0
15 to 19	1.8	3.8	3.2
20 to 24	2.3	3.9	3.6
25 to 29	2.4	5.4	4.8
30 to 34	5.3	6.0	5.9
35 to 39	5.7	9.0	8.6
40 to 44	4.7	10.6	10.3
45 to 49	8.0	12.0	11.7
50 to 54	6.0	16.3	15.9
55 to 59	9.0	21.6	21.3
60 to 64		23.4	23.4
65 to 69		37.4	37.4



- For scuba divers the curve progression confirms a linear loss of divers by approx. 8.5% annually starting at the age of 20 to 35 years at first initial training.
- For leisure divers the curve progression confirms that these are visible for specialist shops just 2 to 5 years after initial training (almost independent of age).

7 Status of Education

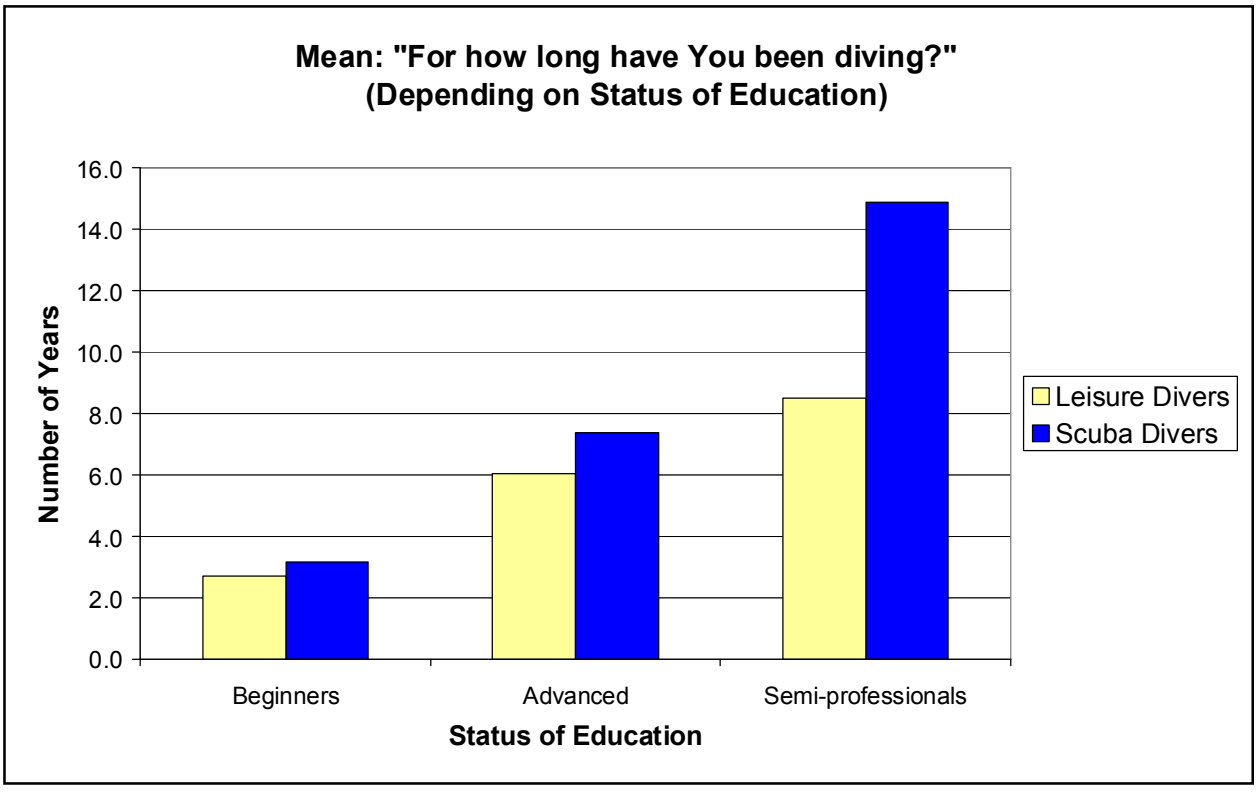
Number of divers			
Status of education	**Leisure Divers**	**Scuba Divers**	**Total**
Beginners	135,834	15,788	151,622
Advanced	85,722	89,651	175,373
Semi-professionals	6,580	83,853	90,433
Total	**228,136**	**189,292**	**417,428**



- Scuba divers predominantly have an advanced or semi-professional level of education.
- Leisure divers (observable in this survey) are mostly beginners and around one-third are advanced.

7.1 For how long have you been diving? (Depending on Education)

Average years of diving experience			
Status of education	**Leisure Divers**	**Scuba Divers**	**Average**
Beginners	2.7	3.2	3.0
Advanced	6.0	7.4	7.2
Semi-professional	8.5	14.9	14.8



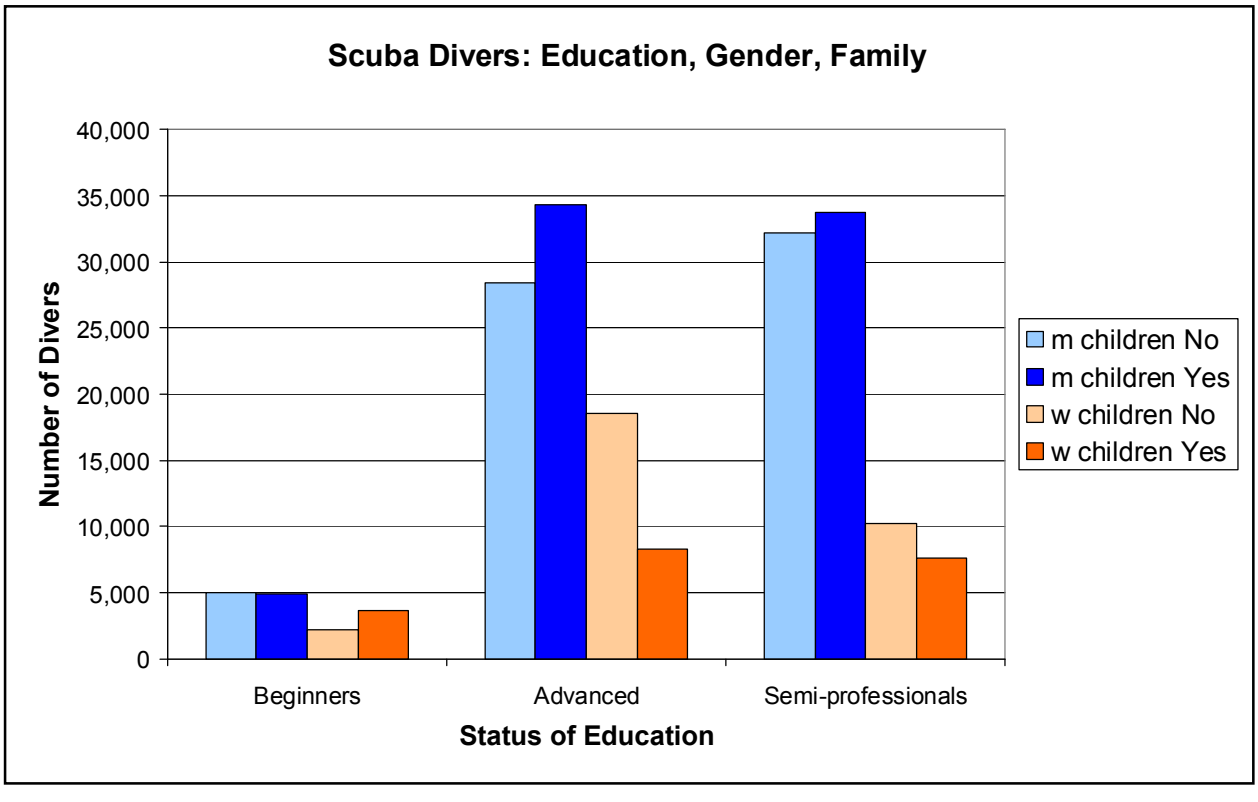
- Both scuba divers and leisure divers average as for

  Beginners around 3 years and
  Advanced 6 to 7 years of experience.

- Scuba diving semi-professionals have been diving for about 15 years; few semi-professionals without own equipment for about 9 years.

7.2 Education, Gender, Family

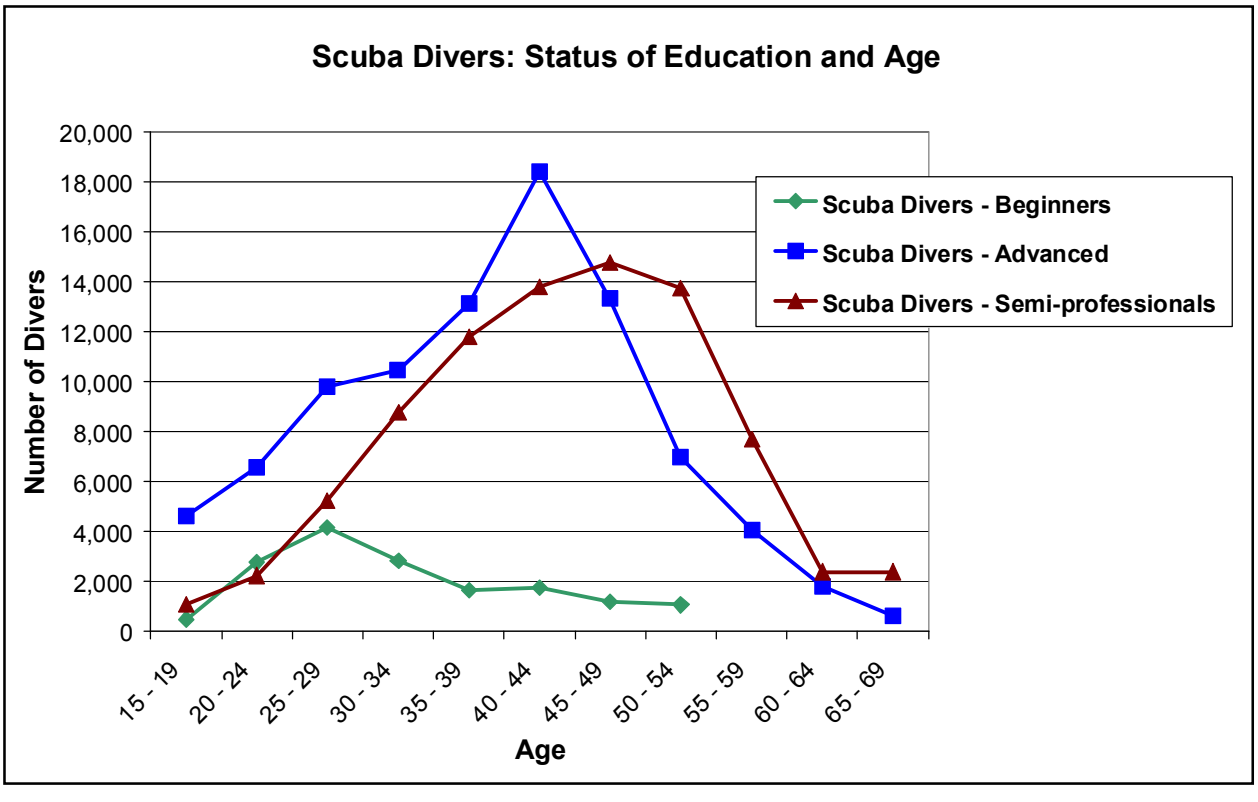
Number of Divers				
	Scuba Divers			
	Men		Women	
Status of Education	**Children no**	**Children yes**	**Children no**	**Children yes**
Beginners	5,021	4,941	2,168	3,658
Advances	28,461	34,335	18,578	8,276
Semi-professionals	32,237	33,728	10,276	7,613
In total	**65,719**	**73,003**	**31,022**	**19,547**



- With an increasing level of education scuba divers are mainly men.
- The majority of scuba diving women are childless.
- Scuba diving women mainly remain at an advanced stage.
- One-half of scuba diving men have children.

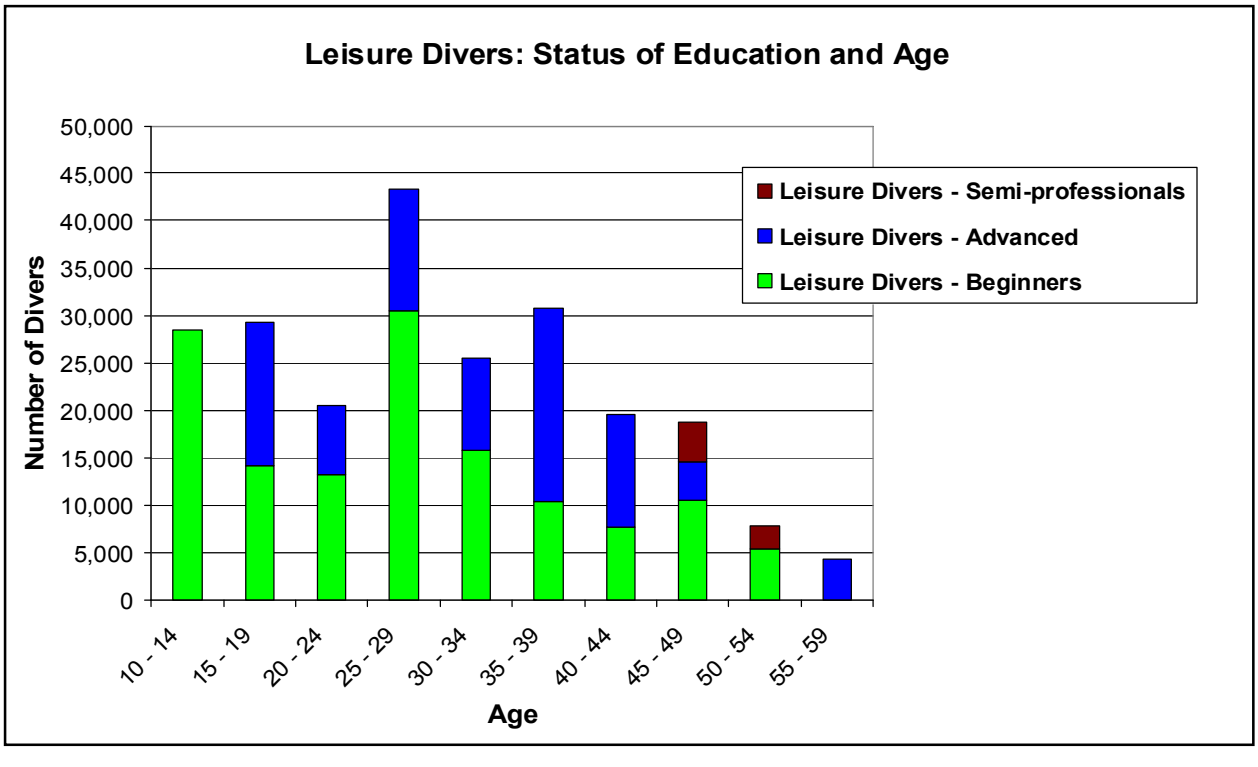
7.3 Educational Status and Age

Number of Divers				
	Scuba Divers			
Age Group	**Beginners**	**Advanced**	**Semi-professionals**	**Total**
15 to 19	476	4,601	1,058	6,134
20 to 24	2,737	6,544	2,221	11,501
25 to 29	4,158	9,776	5,214	19,148
30 to 34	2,809	10,473	8,787	22,069
35 to 39	1,634	13,132	11,798	26,564
40 to 44	1,748	18,423	13,800	33,970
45 to 49	1,180	13,311	14,768	29,259
50 to 54	1,047	6,951	13,754	21,751
55 to 59		4,061	7,697	11,758
60 to 64		1,784	2,379	4,163
65 to 69		595	2,379	2,973
Total	**15,788**	**89,651**	**83,853**	**189,292**



- For scuba divers it is remarkable that in advanced divers of the age group of 45 to 49 years there is a rapid age-related decrease; for semi-professionals this occurs approx. 5 years later.
- Scuba divers of 60+ are rare.

Number of Divers				
	Leisure Divers			
Age Group	Beginners	Advanced	Semi-professionals	Total
10 to 14	28,513			28,513
15 to 19	14,140	15,120		29,260
20 to 24	13,160	7,315		20,475
25 to 29	30,464	12,852		43,316
30 to 34	15,748	9,738		25,486
35 to 39	10,394	20,361		30,754
40 to 44	7,633	11,875		19,508
45 to 49	10,418	4,167	4,167	18,753
50 to 54	5,364		2,413	7,777
55 to 59		4,293		4,293
Total	**135,834**	**85,722**	**6,580**	**228,136**



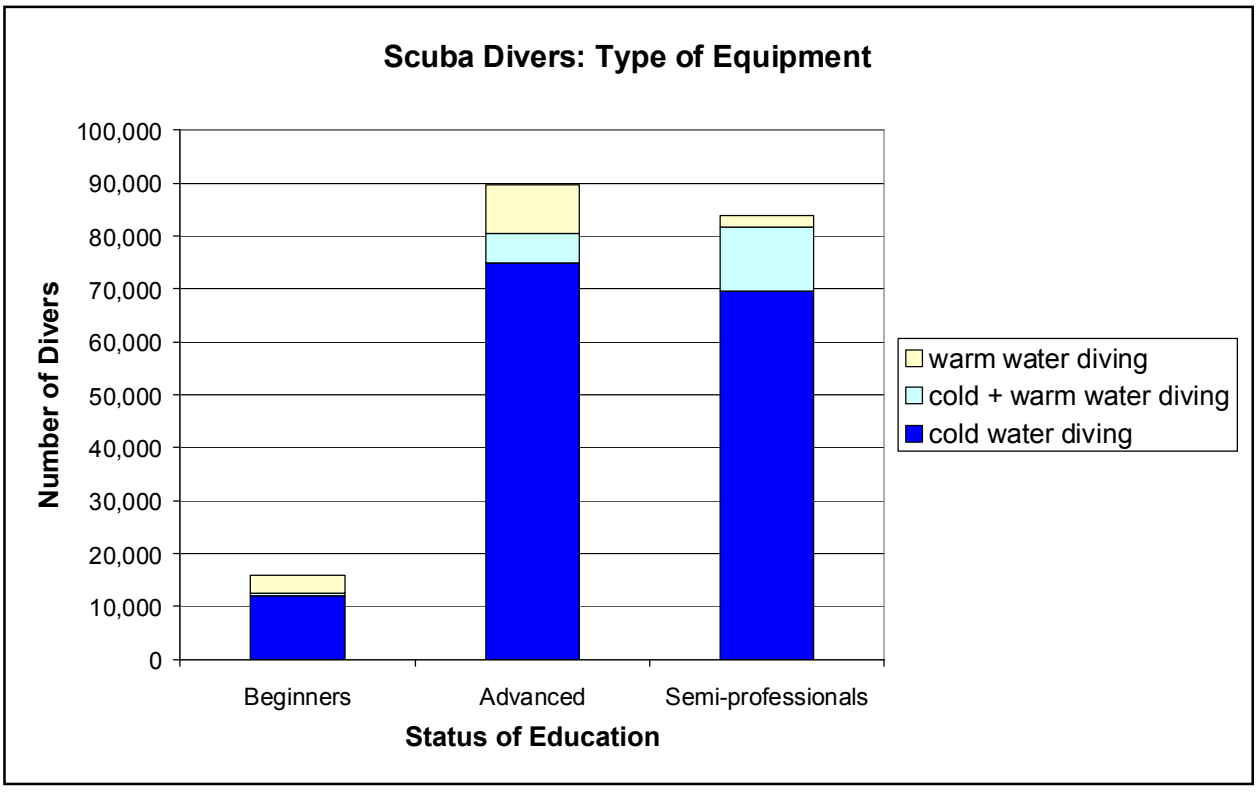
Considering the small sample sizes:

- With an increasing age (experience) leisure divers develop from beginners to advanced.
- The pool of leisure divers remains all about the same for all age groups; but at the age of 45 an age-related decrease starts (apart from the few semi-professionals).

8 Equipment

Equipment and educational level

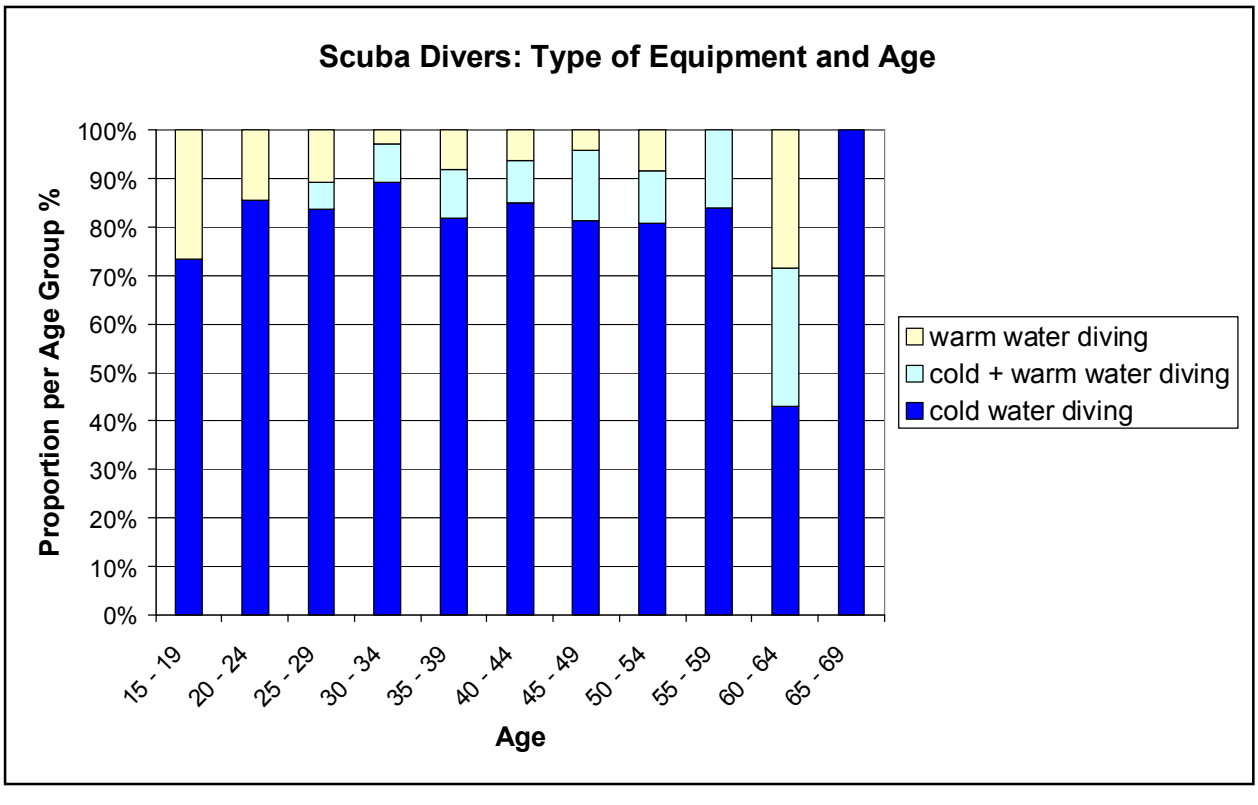
Number of Divers				
	Scuba Divers			
Educational level	**Cold water**	**Cold + Warm water**	**Warm water**	**Total**
Beginners	12,082	450	3,256	15,788
Advanced	74,942	5,496	9,213	89,651
Semi-professionals	69,555	12,235	2,064	83,853
Total	**156,579**	**18,180**	**14,533**	**189,292**



- Most of the scuba divers possess equipment suitable for cold water.
  With growing educational level eventually additional warm water equipment is acquired.

Equipment and Age

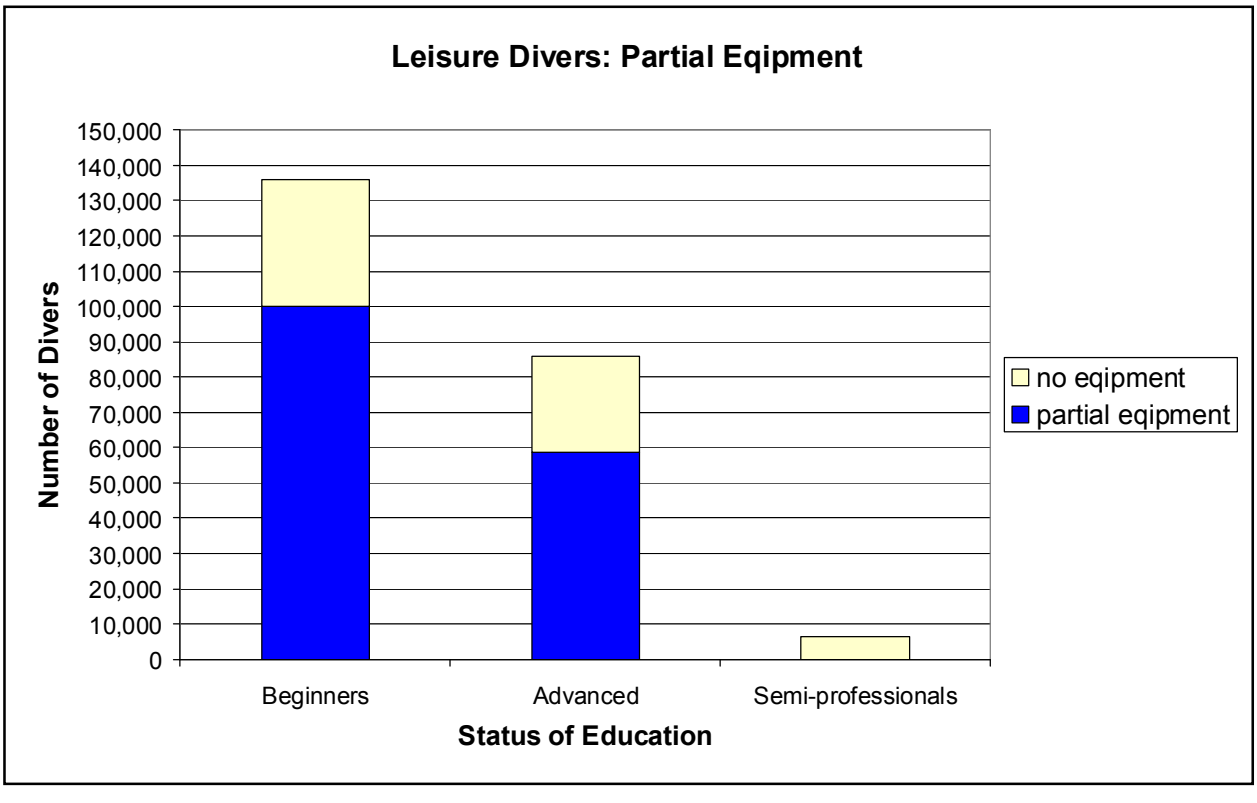
Rate / Age Group %	Scuba divers		
Age Group	**Cold water**	**Cold + Warm water**	**Warm water**
15 to 19	73%	0%	27%
20 to 24	86%	0%	14%
25 to 29	84%	6%	11%
30 to 34	89%	8%	3%
35 to 39	82%	10%	8%
40 to 44	85%	9%	6%
45 to 49	81%	14%	4%
50 to 54	81%	11%	8%
55 to 59	84%	16%	0%
60 to 64	43%	29%	29%
65 to 69	100%	0%	0%
Average	**83%**	**10%**	**8%**



- About 20% of scuba divers own warm water equipment,
- But with increasing age (at about 30) 90% have (additionally) suitable equipment for cold water.
- Remark: The tendency at the age group 60plus are based on very small sample sizes.

Leisure divers with partial equipment

Number of divers			
	Leisure divers		
Educational level	**Partial equipment**	**No equipment**	**Total**
Beginners	99,872	35,962	135,834
Advances	58,660	27,062	85,722
Semi-professionals		6,580	6,580
Total	**158,531**	**69,605**	**228,136**



Considering the small sample sizes:

- Obviously the majority of leisure divers (approx. 70%) purchased parts of equipment during or shortly after their initial training.

9 Dives

9.1 Dives in Total

For the following tables the appropriate frequency distribution has been counted.

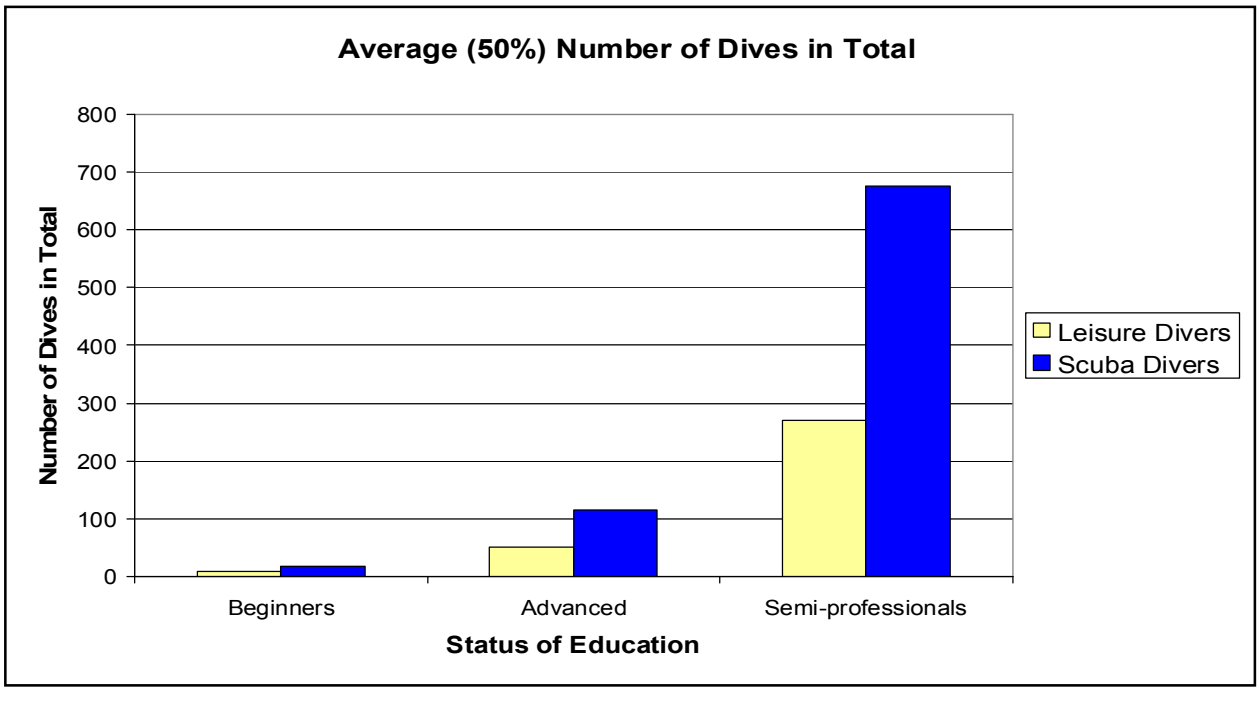
Meaning of the columns:

10% Lower limit:
10% of the divers in this category are below this parameter value, 90% above.

50% Average:
50% of the divers in this category are below this parameter value, 50% above.

90% Upper limit:
90% of the divers in this category are below this parameter value, 10% above.

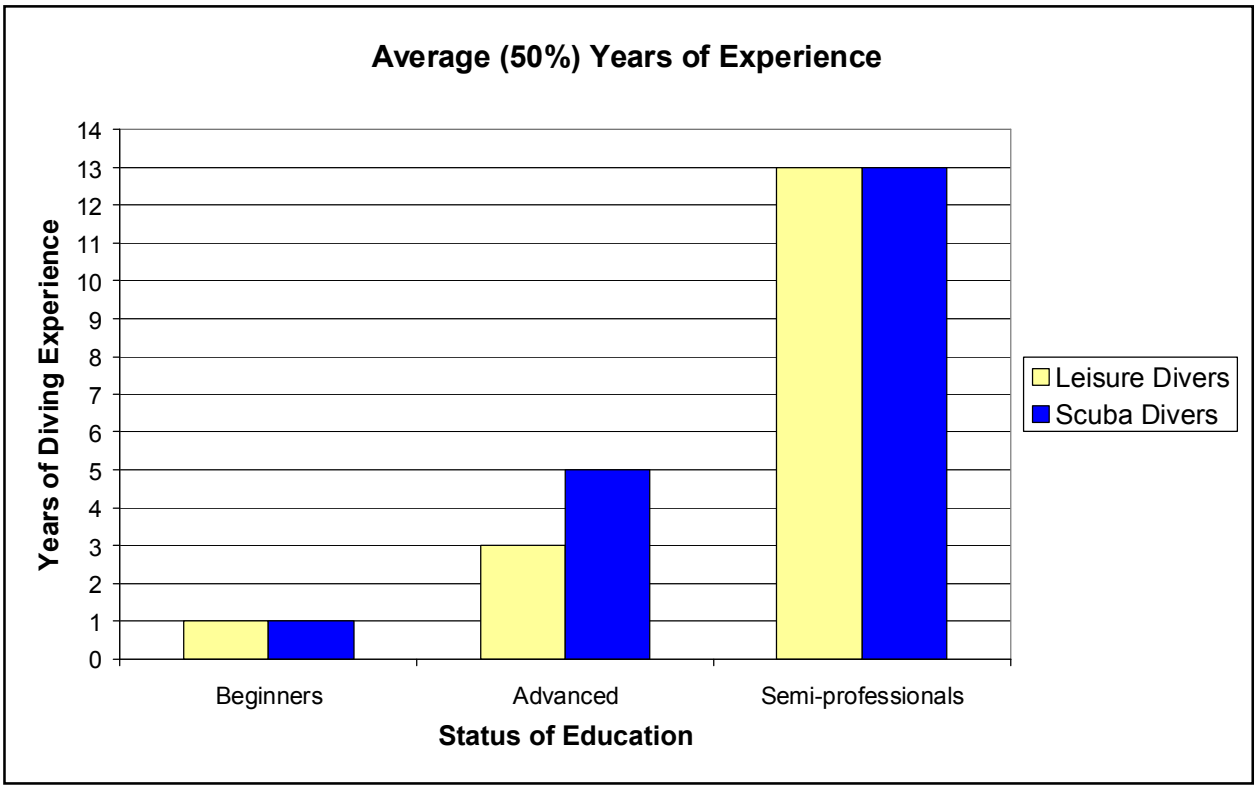
Diversification Number of Dives in Total (%)						
Educational level	**Leisure Divers**			**Scuba Divers**		
	10%	**50%**	**90%**	**10%**	**50%**	**90%**
Beginners	2	9	35	5	18	80
Advanced	13	50	150	40	115	400
Semis-professionals	250	270	280	192	675	2.800
Mean	**2**	**18**	**83**	**36**	**220**	**1.410**



- Expectedly, at all educational levels scuba divers passed on average (50%) twice as much dives in total than leisure divers did.

9.1.1 For how many years have you been diving?

Distribution number of years in total (%)						
Educational Level	**Leisure Divers**			**Scuba Divers**		
	10%	**50%**	**90%**	**10%**	**50%**	**90%**
Beginners	0	1	6	0	1	6
Advanced	1	3	15	1	5	16
Semi-professionals		13		4	13	30
Average	**0**	**1**	**12**	**1**	**8**	**25**



- Both among scuba divers as well as among leisure divers, beginners have, on average, been actively diving for one year.
- Within 6 years (90%) beginners start further training to get an advanced level (or they quit active diving).
- Advanced divers have been active for 3 to 5 years on average.
- Semi-professionals (44% of scuba divers) have been active for 13 years.

9.2 Dives Yearly

9.2.1 Averaged Dives Yearly in Total

Diversification averaged dives yearly						
	Leisure divers			Scuba divers		
	10%	50%	90%	10%	50%	90%
Beginners	2.4	8.6	19	2.8	12.4	21
Advanced	4.4	16.7	33.5	9.9	24.7	63.8
Semi-professionals		20		23.1	59.7	135.5
Mean	**3.8**	**13.4**	**33.5**	**11.9**	**35.2**	**103.3**

9.2.2 Dives 2008

Diversification dives 2008						
	Leisure Divers			Scuba Divers		
	10%	50%	90%	10%	50%	90%
Beginners	0	0.5	10	0	9.5	29
Advanced	0.5	11	25	4.5	25	70
Semi-professionals	0	40	0	19	71	150
Mean	**0**	**5.5**	**23**	**5**	**39**	**120**

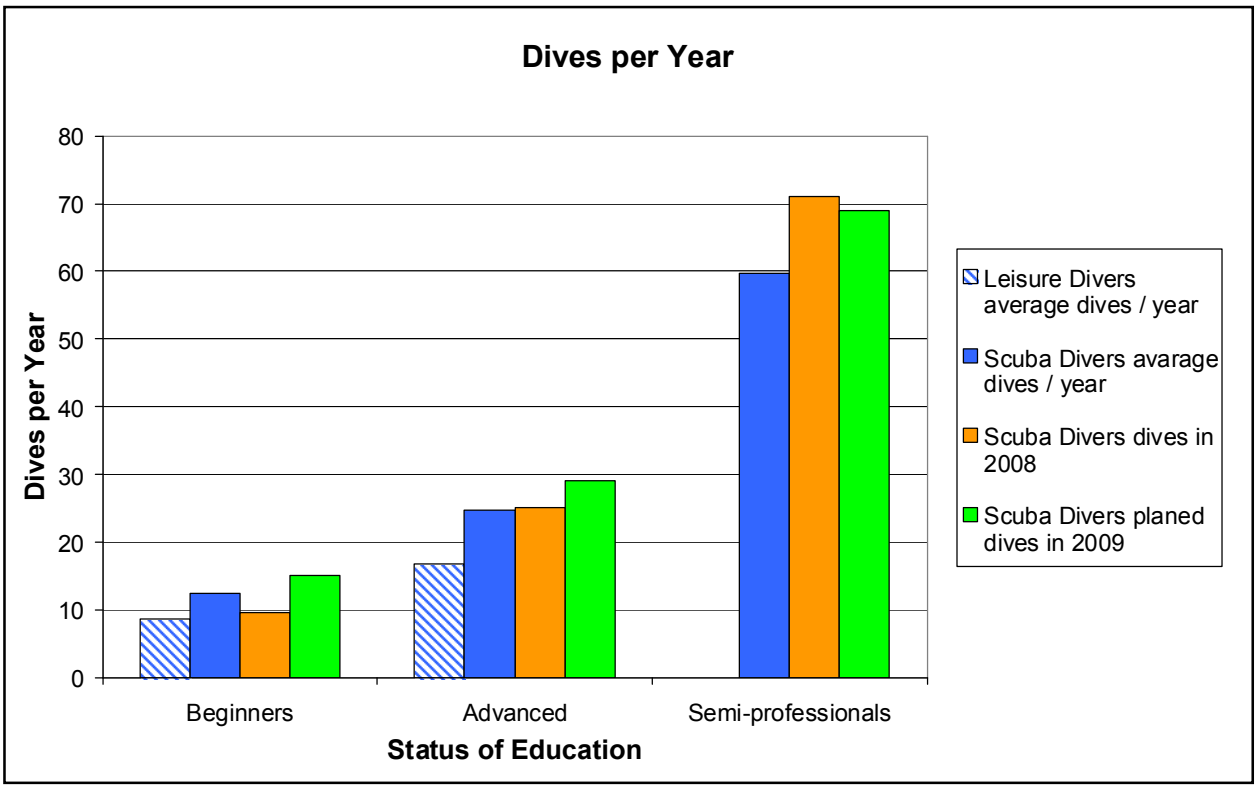
9.2.3 Intended Dives 2009

Diversification intended dives 2009						
	Leisure Divers			Scuba Divers		
	10%	50%	90%	10%	50%	90%
Beginners	1	9.5	19	3.5	15	30
Advanced	1	9.5	39	9	29	75
Semi-professionals		29		24	69	160
Mean	**1**	**9.5**	**29**	**10**	**40**	**120**

9.2.4 Summary: Number of Dives per annum: Average in Total / 2008 / 2009

Average values (50%) by comparison:

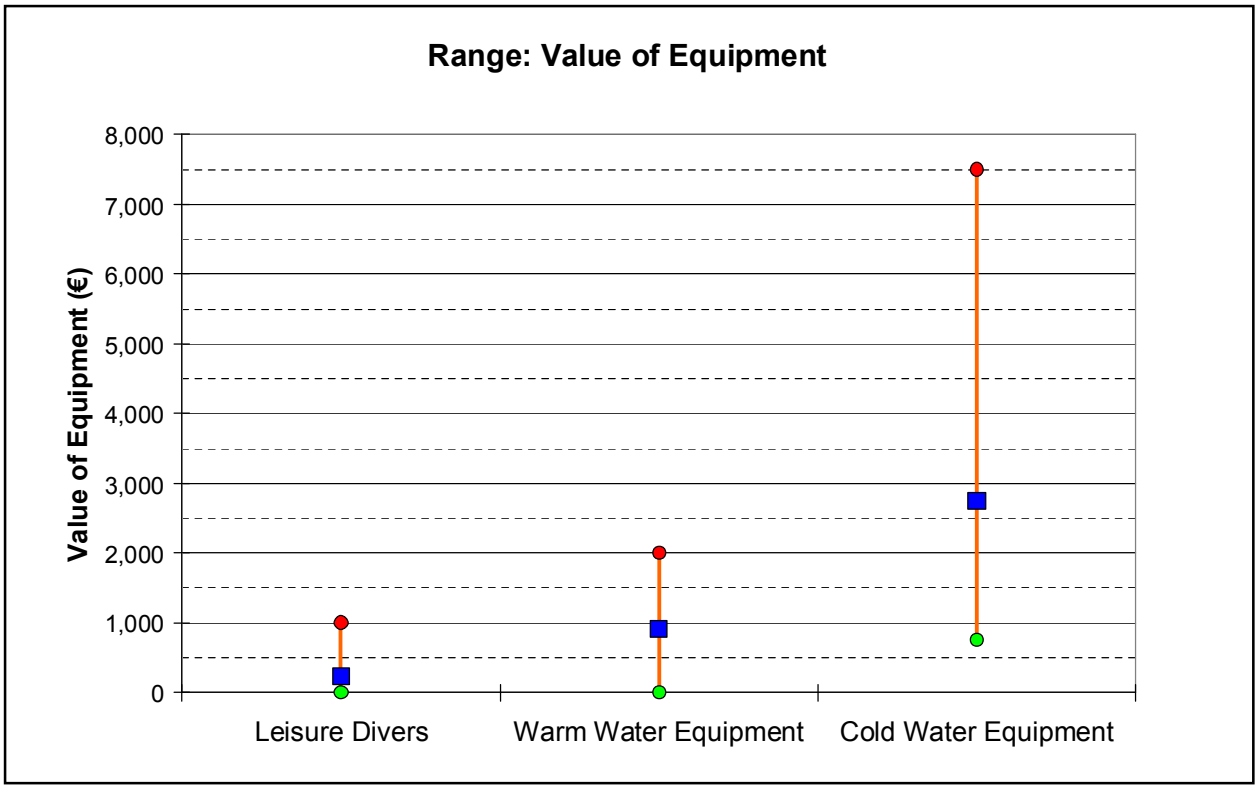
Averaged values (50%) Dives Yearly						
	Leisure Divers			Scuba Divers		
	Averaged number yearly	Dives 2008	intended dives 2009	Averaged number yearly	Dives 2008	Intended dives 2009
Beginners	8.6	0.5	9.5	12.4	9.5	15
Advanced	16.7	11	9.5	24.7	25	29
Semi-professionals	20	40	29	59.7	71	69
Mean	**13.4**	**5.5**	**9.5**	**35.2**	**39**	**40**



- The data of scuba divers (with own equipment) are continuously:
  - Average dives/year: 35 to 40
  - Beginners: 10 to 15
  - Advanced: 25 to 30
  - Semi-professionals: 60 to 70
- The data of leisure divers are non-uniform considering the small sample sizes:
  - Beginners: average approx. 0 to 10 dives/year
  - Advanced: average approx. 10 to 15 dives/year

10 Expenditure for Existing Equipment

Value of Equipment			
Type of Equipment	**10%**	**50%**	**90%**
Leisure divers	0	230	1,000
Cold water	750	2,750	7,500
Cold+ warm water	1,200	3,000	7,000
Warm water	0	910	2,000

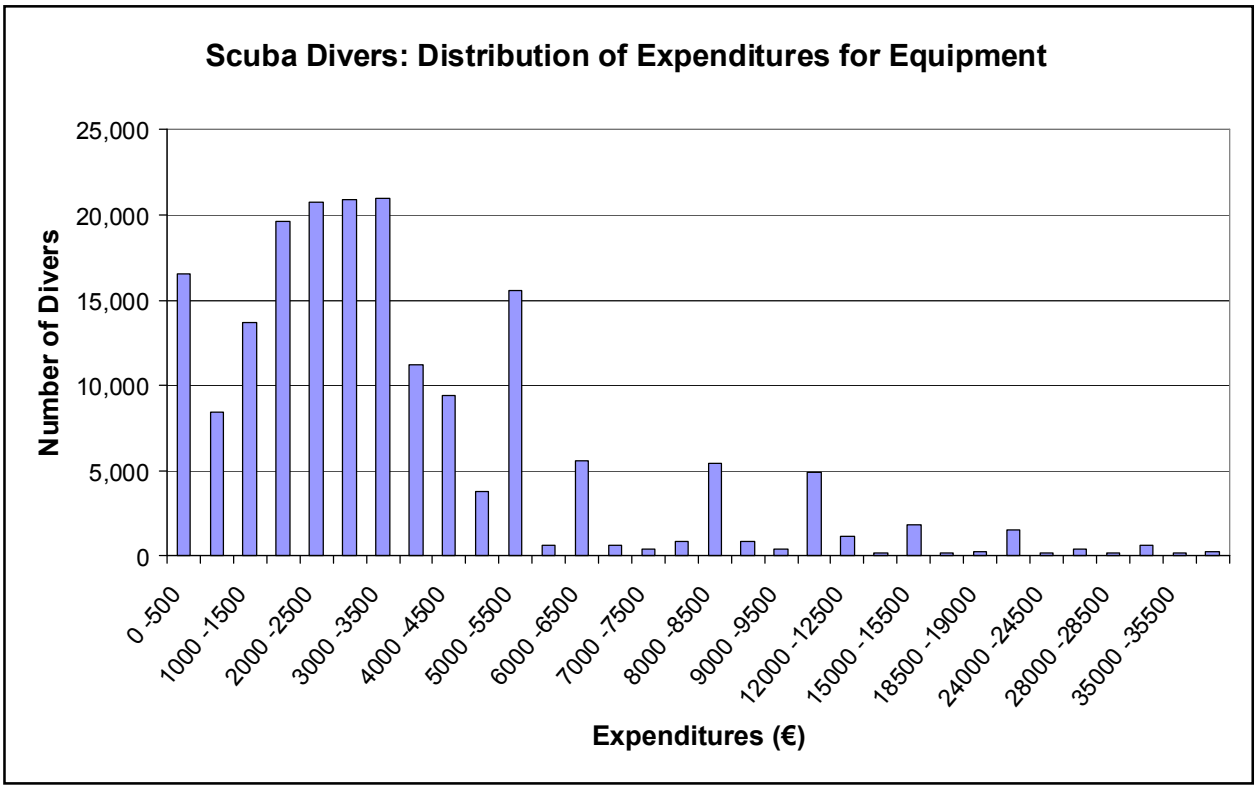


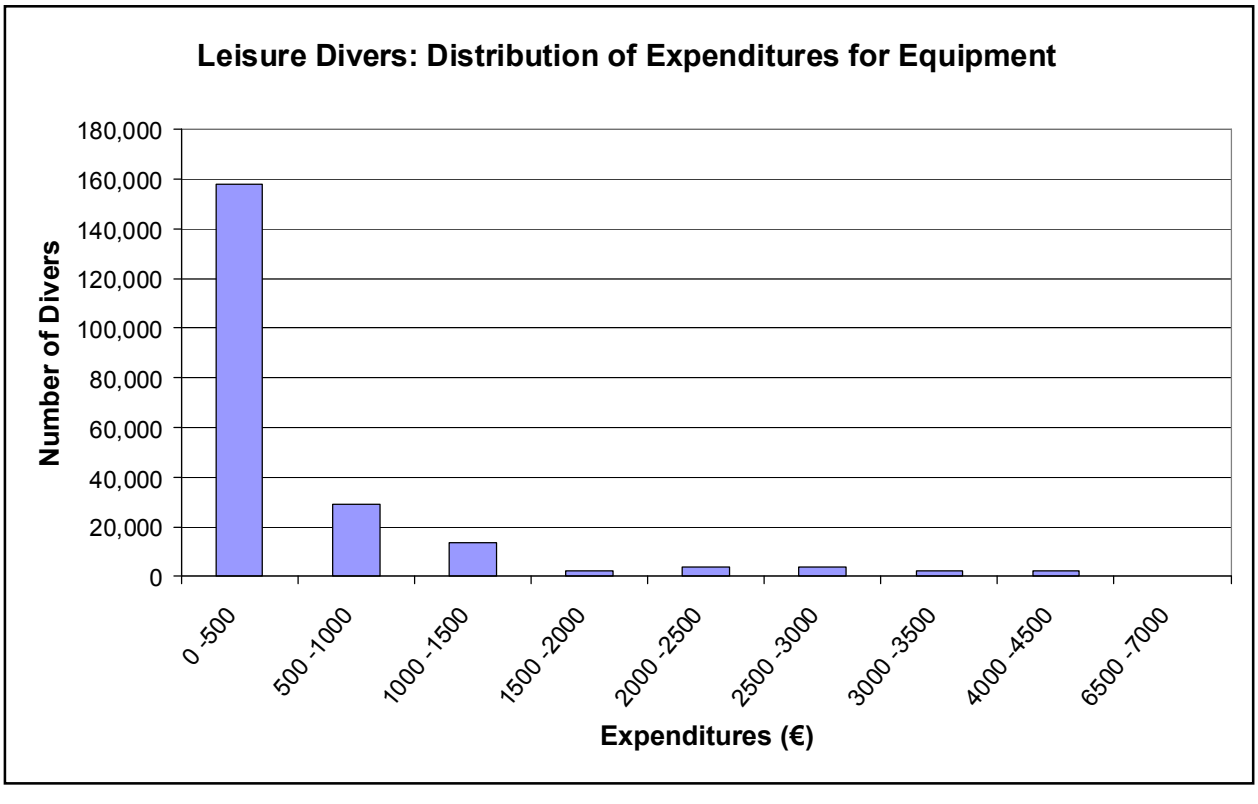
- Leisure divers (without owned full equipment) invest averages (50%) around **230 €**
  for their partial equipment.
- The cost for warm water equipment averages about **910 €**.

- Scuba divers invest for a complete cold water or cold- and warm water equipment on average

  between **2,700 to 3,000 €**,

  up to maximum of 7,500 €





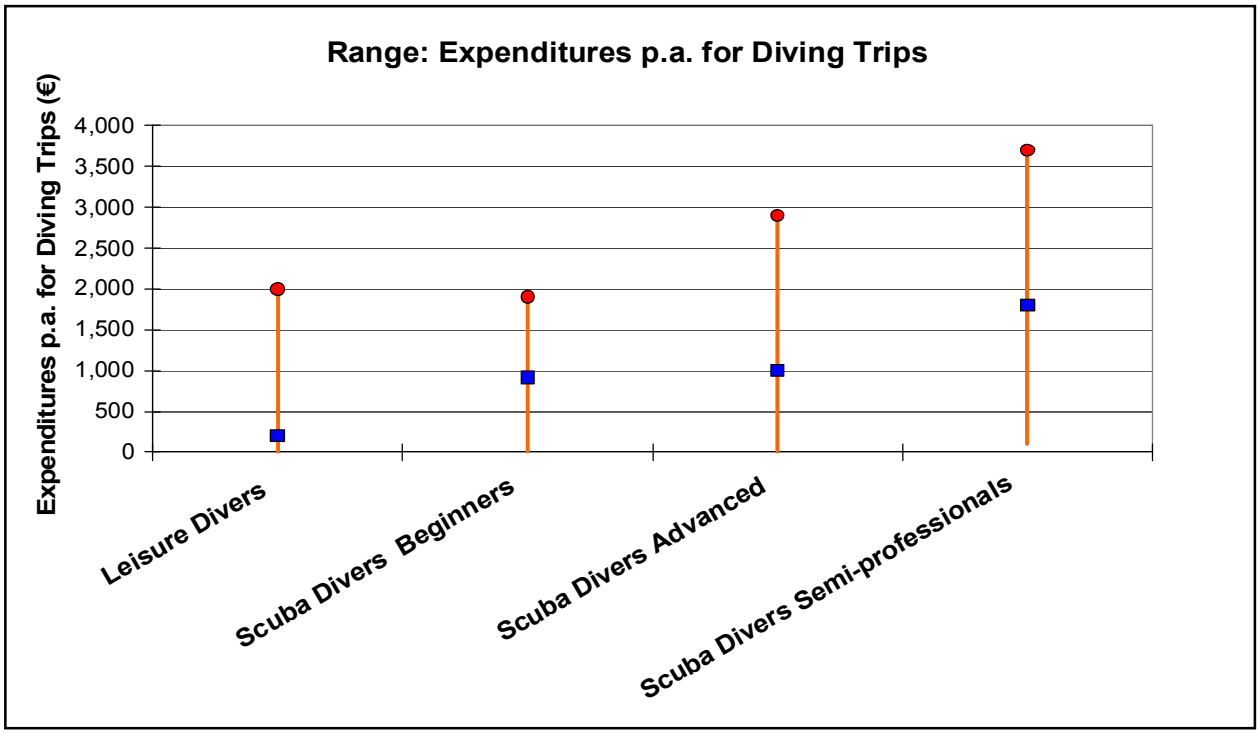
- Scuba divers mostly spend 1,500 to 3,500 € for their equipment.
- Leisure divers spend rarely more than 500 €.

11 Yearly Expenditure

11.1 For Diving Trips

Expenditures Yearly for Diving Trips			
	10%	**50%**	**90%**
Leisure divers	0	200	2,000
Scuba divers	700	1,400	3,000

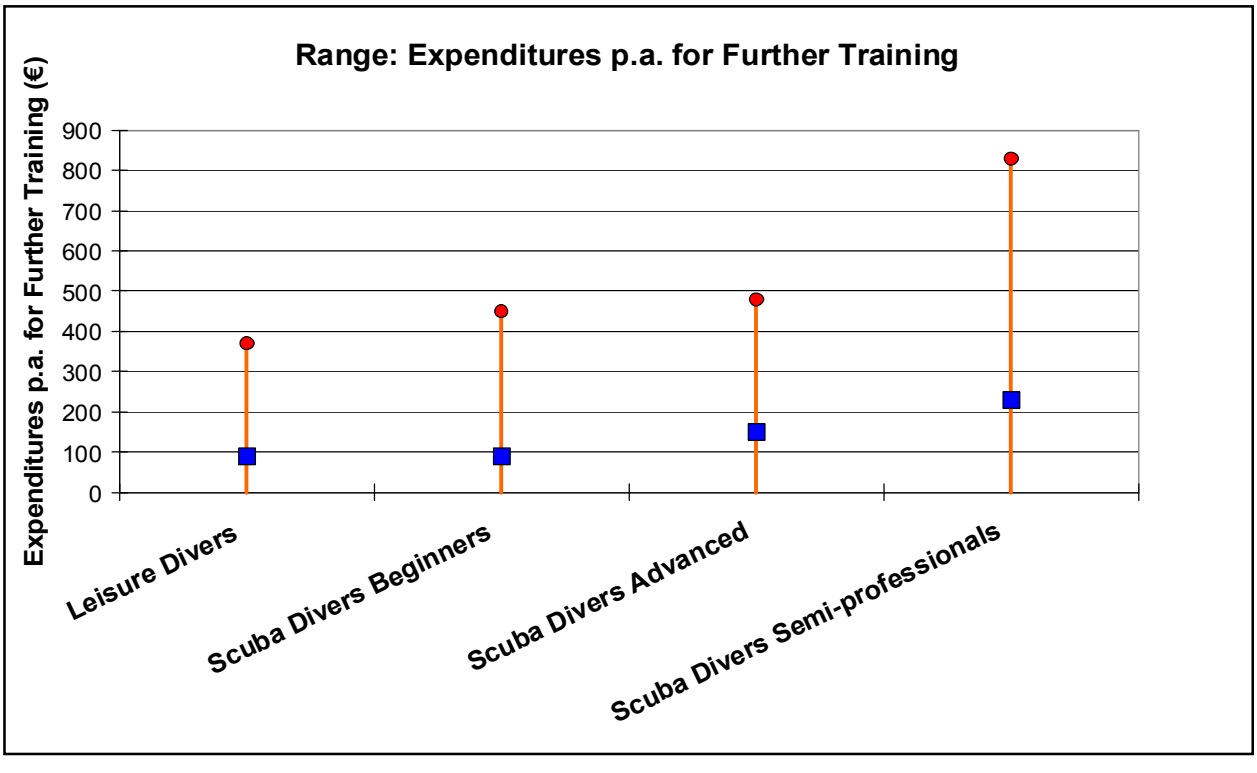
Expenditures Yearly for Diving Trips			
	Scuba Divers		
	10%	**50%**	**90%**
Beginners	0	920	1,900
Advanced	0	1,000	2,900
Semi-professionals	100	1,800	3,700



- The expenditure by scuba divers and leisure divers differs very much:
  Leisure divers spend on average **200 €/Year,**
  Scuba divers on average **1.400 €/Year**
  for diving trips.
- Scuba diving semi-professionals spend for their diving trips even
  on average 1.800 €/year
  up to 3.700 €/year

11.2 For Courses and Further Training

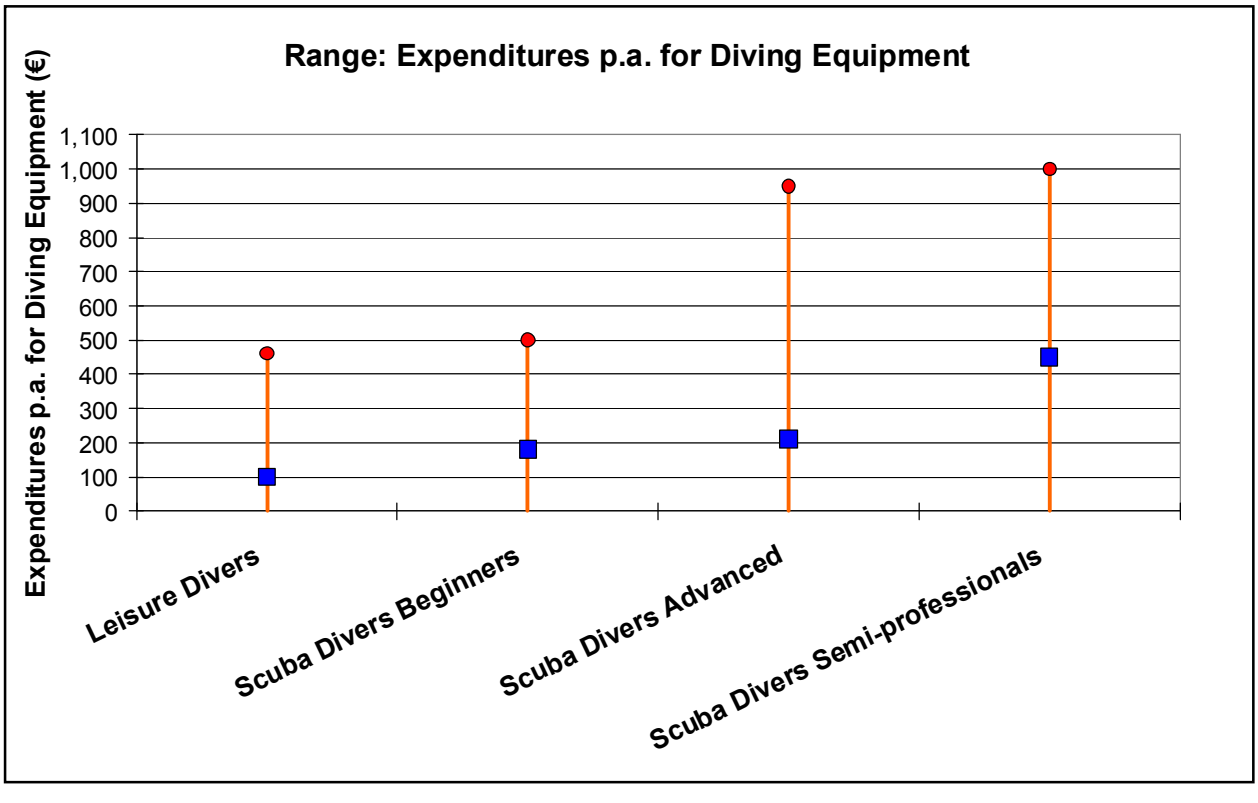
Expenditures Yearly for Further Training						
Educational level	**Leisure Divers**			**Scuba Divers**		
	10%	**50%**	**90%**	**10%**	**50%**	**90%**
Beginners	0	90	340	0	90	450
Advances	0	140	390	0	150	480
Semi-professionals	0	400		0	230	830
Mean	**0**	**90**	**370**	**0**	**170**	**500**



- The yearly expenditure for courses and further training clearly rises according to the educational level.
- On average (50%) beginners and advanced divers spend - with or without own equipment (scuba divers / leisure divers) - all about the same for courses and further training:
  beginners: about 90 €/year
  advanced: about 150 €/year
- The range of additional expenses for further training (90%) is certainly much wider for the case of scuba divers:
  10 % of beginners spend more than 450 €/year,
  10 % of advanced spend more than 480 €/year,
  10 % of semi-professionals more than 830 €/year.

11.3 For Diving Equipment

Expenditures Yearly for Diving Equipment						
Educational level	**Leisure Divers**			**Scuba Divers**		
	10%	**50%**	**90%**	**10%**	**50%**	**90%**
Beginners	0	90	480	0	180	500
Advanced	0	90	300	0	210	950
Semi-professionals		280		0	450	1,000
Mean	**0**	**100**	**460**	**0**	**280**	**980**



- Scuba divers (with own equipment) spend on yearly average (50%) more than twice as much for their equipment than leisure divers do (for their partial equipment).
- The yearly expenditure by scuba divers for service and maintenance of their equipment rise averaged with the educational level:
  beginners: 180 €/year (up to 500 €/year),
  advanced: 210 €/year (up to 950 €/year),
  Semi-professionals: 450 €/year (up to 1,000 €/year)

11.4 Forecast: Estimated Market Volume

It must be pointed out that in this forecast:

- As "expenditures per diver" the aforementioned "averaged" values (50%) are generally used.
- The projection for leisure divers is based on relatively small sample sizes and – therefore - has to be regarded as a rough trend.
- At sales to leisure divers of diving equipment and further training thought has been given to the point that a good deal of divers are “visible” to specialized shops only for a few years after passing initial training. Estimation is that approx. 50% of the leisure divers will be “active” in long-term and will do appreciable business regularly.
  Nevertheless: At the forecast for **diving trips** the total of leisure dives has been taken into account.
- The data allow no indication if and to what extent
  a) Purchases are made at specialized shops or at other suppliers,
  b) Purchases are made in Germany or abroad (e.g. at vacation resort).

11.4.1 Diving Equipment

Diving Equipment			
	Leisure Divers	**Scuba Divers**	**Total**
Number of divers	230,000	190,000	420,000
Number active divers 50%	115,000		
Beginners per year	23,000	16,000	39,000
Expenses once-only at start per diver	230 €	2,500 €	
Running expenses p.a. per diver	100 €	280 €	
Volume at start per year	5,290,000 €	40,000,000 €	45,290,000 €
Volume running per year	11,500,000 €	53,200,000 €	64,700,000 €
Total volume per year	**16,790,000 €**	**93,200,000 €**	**109,990,000 €**

11.4.2 Courses and Further Training

Courses and Further Training			
	Leisure Divers	**Scuba Divers**	**Total**
Number of divers	230,000	190,000	420,000
Number active divers (50%)	115,000		
Averaged expenses p.a. per diver	90 €	170 €	
Volume per year	**10,350,000 €**	**32,300,000 €**	**42,650,000 €**

11.4.3 Diving Trips

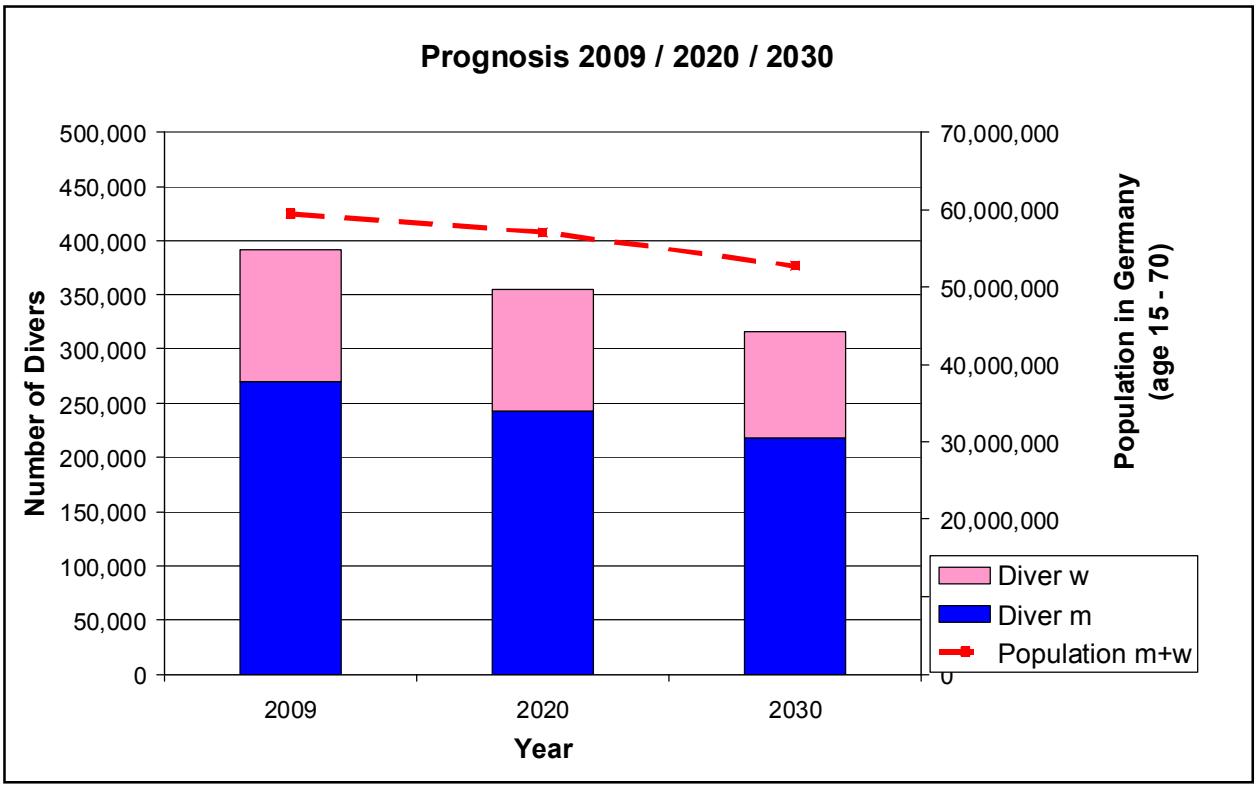
Diving Trips			
	Leisure Divers	**Scuba Divers**	**Total**
Number of divers	230,000	190,000	420,000
Averaged expenses p.a. per diver	200 €	1,400 €	
Volume per year	**46,000,000 €**	**266,000,000 €**	**312,000,000 €**

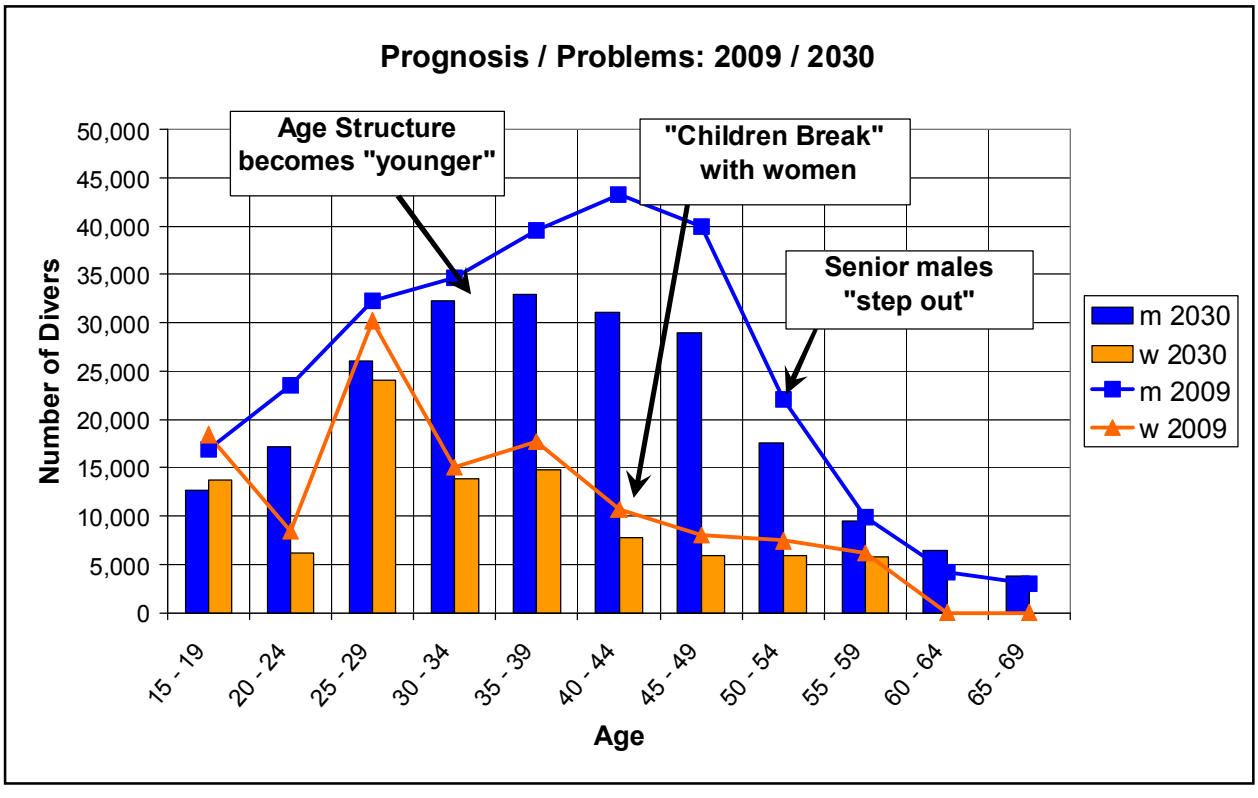
12 Prognosis

Provided that the share of male (m) and female (w) divers of the population (see chapter 4) will not change considerably the foreseeable age distribution can be forecast based on the demographic trend of German census bureau in the years 2020 and 2030.

Scuba Divers + Leisure Divers, age group 15 to 69:

	Year of Prognosis					
	2009		2020		2030	
Age group	**m 2009**	**w 2009**	**m 2020**	**w 2020**	**m 2030**	**w 2030**
15 to 19	16,966	18,428	14,103	15,329	12,653	13,699
20 to 24	23,586	8,390	20,192	7,162	17,243	6,112
25 to 29	32,235	30,229	29,960	27,653	26,085	24,112
30 to 34	34,661	15,005	37,648	16,131	32,251	13,796
35 to 39	39,570	17,749	35,369	16,131	32,904	14,763
40 to 44	43,249	10,690	28,825	7,324	31,068	7,801
45 to 49	39,995	8,017	30,099	6,109	28,916	5,920
50 to 54	22,095	7,433	25,435	8,411	17,517	5,931
55 to 59	9,896	6,156	12,725	7,655	9,442	5,743
60 to 64	4,163	0	5,674	0	6,416	0
65 to 69	2,973	0	2,877	0	3,727	0
Total	**269,389**	**122,098**	**242,908**	**111,905**	**218,222**	**97,879**
Total m + w	**391,486**		**354,812**		**316,101**	





- Substantial structural problems cannot be detected from the collected data e.g. falling interest by younger age groups:
  Diving is an established sport.
- Due to the general demographic change (with unchanged interest in diving) the number of (active) divers will decrease by approx. 10% per decade.
- By the decrease of today's strong proportion of „baby boomers" (40+) the age structure of diving will become "younger" in the future.
- Two age-related trends deserve attention (see data above):
  - Approx. 50% of women at about 30 to 35 years will leave active diving when they give birth to children and they will not continue later.
  - Male leisure divers at 50 years and male scuba divers at 55 years will stop diving within a short time.

13 Hobbies

The interviewees of the survey were also asked for “other hobbies“, up to three free text replies were possible. The named hobbies were collected into groups and count out.

"Proportion %" refers to the sum of all responses (hobby1, hobby 2, hobby 3) of the total of divers.

Men	
Hobby	**Proportion %**
Sports	47.5%
Boat	10.3%
Computer	7.8%
Car, motor-cycling	6.0%
Mountaineering, hiking	4.0%
Photo, video	3.5%
Traveling	2.3%
Pets	1.5%
Music	1.5%
Reading	1.4%
House & garden	1.4%
Shooting	1.3%
Model making	1.1%
Fishing	1.0%
Total	**90.7%**

Women	
Hobby	**Proportion %**
Sports	54.8%
Reading	5.7%
Boat	3.5%
Photo	3.5%
Car, motor-bike	2.8%
Dancing	2.7%
Rescue service	2.5%
Travelling	2.4%
Computer	2.2%
Music	1.9%
Cinema	1.8%
Mountaineering, hiking	1.8%
House & garden	1.3%
Riding	1.0%
Total	**88.0%**

- Sports was mentioned most frequently.
- For male and female divers there are differences in hobbies:
  Men: sports - boat - computer - car, motor-bike
  Women: sports - reading - boat - photo

Hobby Sports in Detail:

Men	
Hobby Sports	**Proportion %**
Bike (bicycle etc.)	23.3%
Jogging	19.0%
Skiing	12.1%
Swimming	9.7%
Fitness	6.4%
Soccer	5.9%
Tennis	5.1%
Martial arts	4.3%
Other athletics	4.3%
Ball	2.6%
Golf	1.8%
Paragliding, aviation	1.7%
Inline skating	1.6%
Ice hockey	1.3%
Kiten	1.0%
Fitness	0.0%
Total	**100.0%**

Women	
Hobby Sports	**Proportion %**
Swimming	23.3%
Jogging	19.7%
Bike (bicycle etc.)	15.7%
Fitness	14.9%
Ball	7.1%
Inline Skating	5.3%
Tennis	3.3%
Skiing	3.3%
Paragliding, aviation	1.6%
Fitness	1.6%
Soccer	0.8%
Martial arts	0.7%
Golf	0.0%
Ice hockey	0.0%
Kiten	0.0%
Other athletics	2.6%
Total	**100.0%**

	Proportion of Sports %		
Hobby Sports	**Men**	**Women**	**Total**
Bike	23.3%	15.7%	**20.4%**
Jogging	19.0%	19.7%	**19.3%**
Swimming	9.7%	23.3%	**14.9%**
Fitness	6.4%	14.9%	**9.6%**
Skiing	12.1%	3.3%	**8.8%**
Tennis	5.1%	3.3%	**4.4%**
Ball	2.6%	7.1%	**4.3%**
Soccer	5.9%	0.8%	**4.0%**
Other athletics	4.3%	2.6%	**3.7%**
Inline Skating	1.6%	5.3%	**3.0%**
Martial arts	4.3%	0.7%	**3.0%**
Paragliding, aviation	1.7%	1.6%	**1.6%**
Golf	1.8%	0.0%	**1.1%**
Ice hockey	1.3%	0.0%	**0.8%**
Fitness	0.0%	1.6%	**0.6%**
Kiten	0.9%	0.0%	**0.6%**
Other	0.0%	0.0%	**0.0%**
Total	**100.0%**	**100.0%**	**100.0%**

- The sport interests of men and women differ as well:
  Men: bike - jogging - skiing - swimming - fitness - soccer
  Women: swimming - jogging - bike - fitness - ball (without soccer).
- For all divers (in total) the following sport interests are most predominant:
  Bike - jogging - swimming - fitness - skiing

Hobbies incl. sports detailed with an individual proportion of > 1% in total:

		Proportion%		
Hobby	**Detail**	**Men**	**Women**	**total**
Sports	Bike	11.0%	8.6%	10.2%
Sports	jogging	9.0%	10.8%	9.6%
Boat		10.3%	3.5%	8.0%
Sports	Swimming	4.6%	12.7%	7.4%
Computer		7.8%	2.2%	5.9%
Car, motor-bike		6.0%	2.8%	4.9%
Sports	Fitness	3.0%	8.2%	4.8%
Sports	Skiing	5.7%	1.8%	4.4%
Photo		3.5%	3.5%	3.5%
Mountaineering		4.0%	1.8%	3.3%
Reading		1.4%	5.7%	2.9%
Traveling		2.3%	2.4%	2.3%
Sports	Tennis	2.4%	1.8%	2.2%
Sports	Ball	1.2%	3.9%	2.1%
Sports	Soccer	2.8%	0.4%	2.0%
Music		1.5%	1.9%	1.6%
Sports	Inline skating	0.8%	2.9%	1.5%
Sports	Martial arts	2.1%	0.4%	1.5%
Rescue service		0.9%	2.5%	1.4%
House, garden		1.4%	1.3%	1.4%
Pets		1.5%	0.4%	1.1%
Dancing		0.2%	2.7%	1.0%
Other		16.6%	17.8%	17.0%
Total		**100.0%**	**100.0%**	**100.0%**

- In total the following hobbies have individual proportion of > 4% of divers in total and together a proportion of around 55% (57% of men, 51% of women).

Hobby	**Detail**	**Men**	**Women**	**Total**
Sports	Bike	11,0%	8,6%	10,2%
Sports	Jogging	9,0%	10,8%	9,6%
Boat		10,3%	3,5%	8,0%
Sports	Swimming	4,6%	12,7%	7,4%
Computer		7,8%	2,2%	5,9%
Car, motor-bike		6,0%	2,8%	4,9%
Sports	Fitness	3,0%	8,2%	4,8%
Sports	Skiing	5,7%	1,8%	4,4%
Total		**57,4%**	**50,6%**	**55,2%**

14 Disclaimer and Contacts

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

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

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

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