

AQUANEWS

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How Many Divers Are There? — and why you should care from the May, 2007 issue of *Undercurrent*

If there is such a thing as a diver parlor game, it's chatting about just how many active divers there are in the U.S. It's a good game, but the truth is, nobody knows. The only group that could actually determine the number, the Diving Equipment and Marketing Association (DEMA), says it has never been tasked with keeping a census of all certified divers so consequently it has no concrete figures on the number of certified divers in the U.S.

The number is important for at least two reasons. First, people in the diving business or wishing to enter it create business plans that need to be based on the number of potential customers, that is, active divers. It's odd that DEMA, an organization with the mission to promote diving and sell more products to a growing number of divers, claims not to have this number. Second, knowing exactly how many divers there are will make accident and fatality statistics accurate.

Three and a Half Million Divers in 1988?

Nearly twenty years ago, conventional wisdom was that 3.5 million Americans were active sport divers, defined then as divers making at least three dives year, which isn't much activity. That figure came from an estimate by one individual, John McAniff, the sole employee of the National Underwater Diving Accident Data Center (NUDADC) at the University of Rhode Island, which soon afterwards got scooped up by the Divers Alert Network (DAN). However, Robert Monaghan, a NAUI and PADI instructor with doctoral training in statistical modeling, argued in a series of *Undercurrent* articles that the active diver population was actually closer to 700,000. Subsequently, McAniff told *Undercurrent* that the 3.5 million number was "purely my

guesstimates and have been arrived at without any insider information, and may well be inaccurate."

Undercurrent looked at other perspectives. The National Sporting Goods Dealers Association claimed that in 1986, 1.6 million Americans made one or more dives (including resort course dives, clearly a larger population than the "active divers" guesstimated by the NUDADC). Paul Tzimoulis, publisher of the then-dominant dive publication *Skin Diver*, told us that he assumed an active diver market of roughly 1.1 million when promoting the magazine. *Undercurrent*, combining data from several sources, calculated an active diver base approaching 600,000 in the late 1980s.

Of course, you can't calculate the number of divers if you don't know the number initially certified or the dropout rate. It was at a time when PADI alone was claiming to certify 400,000 divers annually (a grossly inflated number, as we'll show later). Monaghan used that number, but claimed that the dropout rate was close to 80 percent. PADI objected to such a high figure, though that statistic had come from a PADI publication. Based on PADI student surveys, the agency posited that the actual rate was somewhere "around 40 percent after three years." A research firm hired by DEMA conducted a diver erosion study that proclaimed a dropout rate of only 15 percent after 12 months, with 47 percent of divers still active after four years.

Not Much Change 20 Years Later

Today, in the 21st century, you'd expect the industry to have a better handle on things, right? Well, not so fast, Buck Rogers. Numbers are still hard to find and certify because dive organizations are tight-lipped

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How Many Divers Are There?

about their data, refusing to share it with the public and even with each other. "The industry is under-reported," says Mark Young, publisher of *Dive Center Business*. "We don't know much about ourselves."

Dive organizations are tight-lipped, refusing to share their data with the public and even with each other.

Renee Duncan of DAN told us, "There's really no true number for certified divers because this is not a regulated industry, so it will always be a squishy figure. We've quoted the 1 to 3 million number on our diving fatality reports." Until this spring, PADI's website addressed the question "How Many Active Divers Are There in the US?" by noting that it is one of the most frequently asked questions PADI America receives. The most recent estimates posted (for the calendar year 2000) ranged from 1.6 to 2.9 million, but they were recently taken off the site (PADI did not respond to multiple phone calls we made to discuss these numbers). Nor does NAUI, SDI/TDI or SSI list figures on their web sites. William Cline, founder of the diving consultancy firm Cline Group, says he extrapolated several sources to come up with the industry's accepted number of three million divers in the U.S., but he believes there are actually more. "If you look at the total number of divers within the U.S. that have been certified over the past 25 years, take into account attrition (by natural causes), and use an average certification figure escalating from 1980, considered the beginning of the real U.S. growth for scuba, you end up with six million certified, living divers in the U.S.

"However, and there is a big however to this number," he adds, "No one speaks about the masses that are certified but only occasionally participate--in most cases, never since their certification."

Dane Farnum, once the publisher of *Scuba Diver* and now in charge of it and several other magazines with F+W Publications, told *Undercurrent* that he figures there are about a million people who make five or more dives a year.

How Many Divers Get Certified?

In 1988, PADI reported certifying 400,000, but it was clearly an inflated number that included all certifications - e.g., rescue diver - and dual certifications (it was common for people to complete one course, but get cards from two agencies).

Bret Gilliam, who founded the training agency TDI/SDI, started the magazine *Fathoms* and was once the CEO of dive gear manufacturer UWATEC, says that

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Rockland Aquanauts Organization Inc.

Mission Statement:

To provide, promote, and advance environmental protection, care, and voluntary clean-up of waterways by any and all lawful means; to promote the importance and care in every manner possible by environmental awareness and otherwise; to purchase, print, publish, and circulate literature to promote the importance and care of the waterways and the work of the Corporation. To perform all acts the Corporation may deem appropriate or advisable in such operation; to establish, provide, and voluntary clean-up waterways, to encourage, support and subsidize the cleaning and protection from pollution.

How Many Divers Are There?

dive agencies routinely blow smoke up people's skirts, and PADI's figures were "far from the truth." No other agencies reported the numbers they certified, but PADI was not the dominant training agency that it is today, so 800,000 new divers a year might have easily been assumed by McAniff.

In 2002, four agencies - PADI, SSI, NAUI and SDI - agreed to share data. They reported certifying 177,000 new divers, but it is unlikely that certifications have dropped 50 percent since PADI's claim. But McAniff's 3.5 million diver guess in 1988 was clearly based on an inflated number, easily three times too high.

Unfortunately, certification data in the future won't be much good. While DEMA's certification audit gets data from four big agencies, there are 10 total and six refuse to play fair. Mark Young says one agency is planning to bail out because of political reasons. "Plus, the numbers they send in are not a complete picture because the agencies themselves question the numbers and how they're gotten."

"We're not attracting as many new divers, we're a graying population, and younger people are going for more extreme sports."

What's An "Active Diver"?

The dive industry has no consensus about the definition of an active diver. "No one has defined it. Is it once a year? Every two years?" says Young. "And if you do define it, how do you know who fits that category? If asked at a party, someone will say he's a diver when in reality the last time he dived was three years ago. Your certification card is good forever. A pilot license requires a medical exam every two years, but there is no equivalent for dive recertification."

Then there's the issue of how different parts of the dive industry track the divers who matter most to them. "To *Undercurrent*, it's someone who plunks down \$59 a year," Cline says. "To a dive resort, it's someone who plunks down \$2,000 every couple of years. To Scubapro, it's someone buying a snorkel or fins, while to a certifying agency it is someone taking training or buying books."

The participation rate is also nebulous, Cline says. "We evolved from a 'dive once a month' to a 'one dive vacation a year' to be considered active." The National Sporting Goods Association, which does an annual sports participation study, shows the number of divers at 2.1 million; however, it just asks people, "Did you participate in scuba diving on one or more occasions?" In polls like these, braggarts and wishful thinkers inflate the numbers substantially.

The other methods used to get diver counts typically get lower figures. By using market share data from resort destinations and extrapolating for countries divers came from, the U.S. has 1.5 million traveling divers, not taking resort courses into account. Insiders estimate that paid dive magazine subscriptions fall well below half a million.

Dropout Rates

How many people stop scuba diving and when is either unknown or the industry's best kept secret. When asked about dropout rates, DEMA spokesperson Lisa Blau said, "With regards to the number of new divers certified offsetting the number of people leaving the sport, it is well known and confirmed by two separate studies conducted by two different companies, several years apart, that more than half the divers certified in a given year are still active five to seven years following their initial certification. By calculation, the number entering the sport would be far greater than the number becoming inactive." But when *Undercurrent* asked for the sources of those two studies, Blau said she was unable to provide them. We could find no one else who knew of these studies.

Though DAN is seeing its membership grow, spokesperson Renee Duncan says the industry is flat right now. "Everyone acknowledges that. We're not attracting as many new divers, we're a graying population, and younger people seem to be going for more extreme sports." Diving is no longer considered an extreme sport.

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How Many Divers Are There?

Across the pond, the English seem to agree. The British Sub Aqua Club posted this gloomy outlook on its website. "Over the past few years, the UK Diving industry has been challenged by deteriorating business conditions. Consumer habits are different and markets have changed. The traditional description of a UK Diver, and likely member of the British Sub-Aqua Club, has shifted. Increasingly individuals take up diving as one of a range of activities experienced for a short time before moving on to something else. New divers often take to the water for the first time abroad and are less inclined to continue when faced with conditions in UK water."

All sorts of numbers are bandied about for the actual dropout rate after the first year, ranging from as low as 40 percent to as high as 80 percent, but nothing is official. When describing scuba classes on his website, Mark Scott, owner of Mark's Water Fantasy Diving in Maui, states that PADI has the highest dropout rate of any certification agency. When asked where he got that statistic, Scott replied that he saw it on several websites, although *Undercurrent* didn't find it posted anywhere else.

So, for comparison, let us cite *Undercurrent* renewal statistics. After the first year of subscribing, 40 percent of our subscribers continue. After the second year, 65 percent stay with us and after the third year, 85 percent remain. In the magazine business, that is exceptionally good, and those numbers are ones to be proud of. However, it also means that after three years, only 22 percent of initial subscribers remain. Now, over the years many of these subscribers return - - they start diving again, start traveling, whatever. But we can't count them as active subscribers if they're not paying money and so our dropout rate, after three years, is 78 percent. We suspect the dive industry would be delighted to have rates like these.

So How Many Divers Are There?

If you define active as taking five or more dives a year, which seems reasonable, we think 1.2 million, plus or minus 15 percent, might hit it pretty close. And we will be pleased to publish any data to the contrary.

-- ***Ben Davison***

Accepted Hessian Lake Dives 2007

Sunday June 3rd at 9am
Saturday July 7th at 9am
Sunday August 5th at 9am
Saturday September 8th at 10am
Sunday September 30th at 10am
Saturday October 13th at 10am
Sunday October 21st at 10am

Useful tips for better underwater pictures

Viewing and photographing nature is a top outdoor recreational activity. With the summer season just around the corner, it's a great time to master the techniques of underwater photography.

Underwater photography differs from land photography. Water is opaque and full of dense particles which cause light to scatter, bend, and be easily absorbed. Particles can also cause reflections which create a condition called "backscatter". We've compiled some useful tips to make the art of underwater photography a little easier.

Be prepared

1. Have new or fully charged batteries installed as you cannot change batteries underwater. We recommend lithium or rechargeable nickel metal hydride batteries.
2. Have your memory card installed. Before inserting or removing a memory card, check that your camera is turned off.

Color loss

Water will absorb color. The first colors to be absorbed by water are red and yellow, which is why your pictures lose these pigments in deeper water. Typically, you will start to lose these colors at 20 feet with added depth causing added loss. There are three basic corrective measures to help offset color loss:

1. *White balance*

Set the white balance to the camera's auto setting. The auto setting allows the camera to determine the optimal white balance level. This may need to be changed at different depths however, since colors change.

2. *Red filter*

The purpose of a red filter is to help restore natural colors to your picture without the use of a flash by bringing back the red/orange colors. It is best used for adding color to large objects that a flash can't light up.

3. *External flash unit*

An external flash unit, or strobe as it is often called, provides more light and replaces lost colors at depth. The strobe does a couple of things. Since it is more powerful than the camera's built-in flash, better results can be obtained in darker water. Because the strobe is offset from the camera lens, backscatter is significantly reduced. For best results keep a distance of approximately four feet from your subject.

IMPORTANT NOTE: Do not use a flash and red filter at the same time. The result will be too much red in the image.

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Shutter button

The shutter button is an important button to familiarize yourself with.

1. One cause of blurry pictures can be improper use of the shutter button. Press it firmly, only once. Pressing the shutter button too quickly can cause the camera to move and will result in a blurry picture.
2. Many digital cameras have a pre-focus mode. Depress the shutter button halfway to pre-focus your subject. When you're ready to take your shot, press the shutter button completely. This will allow you to take a picture instantly since the camera has already focused on the subject.

Backscatter

Backscatter is the flash reflection off particles in the water. It appears as spots in the background of pictures. To help minimize backscatter try the following tips:

1. Take pictures in close proximity to your subject
2. Use an external flash unit. Backscatter is caused by the lens and flash being too close together. This causes a direct reflection from the flash back into the lens. Offsetting the external flash takes the reflection away from the lens.
3. A flash diffuser can also help reduce backscatter. It causes the light from flash to bounce in many directions so there is not a direct reflection back to the lens.
4. Only use the camera's built-in flash in very clear water.

Practice, practice, and patience

Photography is a skill that requires patience and practice. Take many pictures at different angles and settings, review them, and learn from your results. Remember, underwater photography is a skill with a steep learning curve. Having a solid foundation is the first step to successful photos.

Happy shooting!

ANNUAL MEMBERSHIP FEES ARE DUE

Rockland Aquanauts Organization
2007 Dues

I guess it is that time of the year again, Membership Dues are due. Last year all our members received much more than they gave out to the Organization. As usual you will be receiving a tax donation for the first \$25.00. All members who attended the Annual Dinner not only received money off their own dinner but they also received money off their guests dinner. Everyone whom attended also received prizes, some worth many times the cost of their Dues. Don't forget the Annual Picnic as well as all the BBQ lunch's after the Lake Dives.

So please send in your \$42 dues early to;

Rockland Aquanauts Organization
c/o
Paul Galeazzi Jr.
4 Greensward Drive.
Valley Cottage New York 10989

Deadliest Sea Creatures

Great White Shark



Corbis

These voracious predators can grow up to 21 feet long and weigh 7,100 pounds. White sharks have been known to attack humans and are often considered the most dangerous sharks. Other sharks that attack people are the tiger shark, bull shark and the oceanic white tip shark. Worldwide, unprovoked shark attacks have fallen from a high of 78 in 2000, to 58 in 2005.



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July 2007

How Many Divers Are Out There?, Tips For Underwater Photography, Membership Dues, Hessian Lake 2007

****There Will Be NO July Meeting****