

**Subject:** Cline's Diving Industry 1st Quarter 2014 Survey Results for William Cline

**Date:** Monday, August 18, 2014 at 2:45:05 PM Central Daylight Time

**From:** William Cline <research@clinegroup.net>

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William Cline's Quarterly Scuba industry Survey! Free to the industry for over 5 years!



**Sales overall were up for retailers in the 1st quarter of 2014.**

> Overall, retailers responded as follows for a projected INCREASE in their 1st quarter '14 outlook for gross revenues:

**Eastern US:** same

**Central US:** increase

**Mountain US:** increase

**Pacific US:** increase  
**Mountain US:** increase

> Independent Instructors finally posted a gain last quarter, showing a +12.3% increase in certification numbers for the 1st quarter but are not expecting any gains in the 2nd quarter of 2014.

#### Summary:

> Globally, businesses by region responded their 1st quarter gross revenues were as follows in comparison to the same period last year:

Caribbean & Mexico: +19.7%

**This email sent to: William Cline at william@williamcline.com**

## Cline's Diving Industry Survey Results

### First Quarter 2014 Dive Business Survey

Cline's first quarter 2014 Dive Industry Survey is completed and a total of 128 dive businesses responded to this survey and indicated the following results:

1. All dive businesses saw, on average, a robust +14.2% increase in their gross revenues for the 1st quarter of 2014 versus the same period in 2013.
2. Retailers were also up, reporting a robust +13.4% increase in their overall gross revenues in the 1st quarter of this year.
3. New certifications for retailers were up slightly, posting a +1.9% increase in certifications. Independent instructors posted a stronger gain of +12.3% in certifications.
4. Just like last quarter, retailers posted dive travel sales increase of +4.9% in the 1st quarter.
5. Dive equipment sales for retailers were also up showing a +5.3% increase in sales last quarter.
6. Dive Manufacturers, were up last quarter, as 11 companies responded with a +17.8% increase in sales for the 1st quarter.
7. Combined travel sellers, liveboards and dive operations in resort areas posted a gain of +18.1% last quarter.
8. Specifically resorts and tropical dive operations were up +16.3% in sales for the 1st quarter.
9. Dive liveboards, although a small number responding (7), posted a robust gain of +31.6% for the same period. (Note the number responding is low, so error rate makes this number for reference only and may not indicate all within this classification of course.)
10. 90.2% of the retailer respondents were from the USA.
11. 91.8% of the retailer respondents were the facility owner or manager.

Each business category responded as follows for their Gross Income change in the 1st quarter 2014 versus the same period in 2013:

(outlook for 2nd Q: increase)

S. America: +11.7% (outlook for 2nd Q: increase)

USA & Canada: +14.1% (outlook for 2nd Q: increase)

South Pacific/Asia/Indo: +8.3%\* (outlook for 2nd Q: n/a)

Europe & Other: +22.5% (outlook for 2nd Q: increase)

> When looking at a combined response of the travel sector (resorts, wholesalers & liveaboards), the average company was up in for the 1st quarter posting a +18.1% increase.

These same travel operator's believe their 2nd quarter 2014 projections will increase as well in terms of gross sales.

Cline Group's Projects:

- > Launched Scuba Diving Magazine for Rodale Press
- > Created The 1st Diving Industry Financial, Consumer & Retailer Studies
- > Created The Scuba Tour (now owned by DEMA and called the "Be A Diver Pool")
- Strategic Branding, Research & Marketing For:
  - > The Bahamas Ministry of Tourism
  - > Bonaire's Tourism Board
  - > Barbados's Tourism Board
  - > Grenada Board of Tourism
  - > Bonaire Hotel & Tourism Assoc.
  - > Bahamas Diving

### Gross Revenues Table

Business Classification	1st Q '14 % Change	Number Reporting	% of Whole
Dive Retailers	+13.4%	61	47.7%
Independent Dive Instructors (# certs)	+12.3%	25	19.5%
Dive Resort or Resort-Based Dive Operators	+16.3%	10	7.8%
Dive Wholesaler/Agent or US Booking Office	n/a*	3	2.3%
Dive Related Manufacturers	+17.8%*	11	8.6%
Dive Liveaboard Boat or Charter Boat	+31.6%*	7	5.5%
Dive Related Media, Publication, Website	n/a*	1	.8%
Dive Training Agency	n/a*	2	1.6%
All Other Industry Professionals	<u>-4.0%</u>	7	5.5%
<i>All Averaged/Total Respondents</i>	<i>+14.2%*</i>	<i>128*</i>	<i>100%</i>

\* Totals include companies that declined to disclose their industry status, thus total may be larger than sum. Above overall reported averages are adjusted averages for all business classifications, including those classifications indicated as 'n/a' (a classification in which the responses are too low to calculate accurate category averages but applied to the overall averages and totals). Any tabulation with a total count of less than 10 has a large degree of error rates possible, so view data accordingly.

### Dive Retailer's 1st Quarter Gross by Time Zones (Americas):

> Retailers were again, mostly up with Gross sales. Notably Travel was very strong in the central USA last quarter:

Retailer Income Table	1st Q '14			
Retailers' Time Zone (shows counts)	Gross Revenues	New Certs.	Travel Revenues	Equipment Revenues
Eastern Time Zone (27)	-10.4%	-5.3%	-1.8%	-6.4%
Central Time Zone (18)	+14.7%	-6.0%	+35.5%	+20.6%
Mountain Time Zone (5)*	n/a	n/a	n/a	n/a
Pacific Time Zone (9)*	+9.6%	+8.9%	+19.2%	+3.8%

\* Caution should be exercised when interpreting data from fewer than 10 retailers. Mountain and Pacific Time Zones specifically has a very low count, making the probability of high error rates likely.

### Dive Retailer's 2nd Quarter 2014 Revenues Projections:

> Retailers in general are positive about the 2nd quarter of this year. However Travel are anticipated to stay the same:

Retailers' 2nd Q '14 Forecasts	2nd Q Increase	2nd Q Same	2nd Q Decrease
Gross Revenues	50.8%	27.9%	14.8%
Dive Certification Numbers	45.9%	23.0%	24.6%
Dive Travel Revenues	32.8%	39.3%	14.8%
Equipment Sales Revenues	45.9%	23.0%	24.6%

Error Rates: Data presented is calculated to have an average error rates of 5.6% at 90% confidence level. In other words, if this survey was executed 100 times, 90 times out of 100 the data presented will be within 5.6% of what is shown on this survey.

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As I enter the 10th year for this industry survey, I hope you will read each one, send me questions or challenges. Thanks again for subscribing, and I look forward to hearing your comments from time-to-time.

Best Regards,  
*William Cline*  
President  
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