

**Subject:** Cline's Diving Industry 2nd Quarter 2014 Survey Results for William Cline

**Date:** Wednesday, July 30, 2014 at 11:10:05 PM Central Daylight Time

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

**To:** William Cline <william@williamcline.com>

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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 2nd quarter of 2014.

> Overall, retailers responded as follows for a projected INCREASE in their 3rd quarter '14 outlook for gross revenues:

**Eastern US:** increase

**Central US:** increase

**Mountain US:** n/a\*

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

> Independent Instructors posted a gain for the last two quarters now, showing a +8.8% increase in certification numbers for the 2nd quarter and are optimistic for increases in the 3rd quarter of 2014 as well.

### Summary:

> Globally, businesses by region responded their 2nd quarter gross revenues were as follows in comparison to the same period last year:

Europe & Other:  
+10.6%  
(outlook for 3rd Q:  
increase)

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

## Cline's Diving Industry Survey Results

### Second Quarter 2014 Dive Business Survey

Cline's second quarter 2014 Dive Industry Survey is completed. This survey is the 42nd quarterly survey since 2004, and a total of 124 dive businesses responded to this last survey and indicated the following results:

1. All dive businesses saw, on average, a +8.3% increase in their gross revenues for the 2nd quarter of 2014 versus the same period in 2013.
2. Retailers were also slightly up, reporting +3.3% increase in their overall gross revenues in the 2nd quarter of this year.
3. New certifications for retailers were up slightly, posting a +5.9% increase in certifications. Independent instructors posted a stronger gain of +8.8% in certifications.
4. Just like the last two quarters, retailers posted a dive travel sales increase of +8.0% in the 2nd quarter.
5. Dive equipment sales for retailers were also up again, showing a +2.3% increase in sales last quarter.
6. Dive Manufacturers were also up last quarter, as 14 companies responded with a +13.0% increase in sales for the 2nd quarter of 2014. Equally these respondents are positive about their 3rd quarter as well.
7. Combined travel sellers. liveboards and dive operations in resort areas posted a gain of +9.0% last quarter with a positive outlook for the 3rd quarter as well.
8. Specifically resorts and tropical dive operations were up just like last quarter, posting a +7.3% in sales for the 2nd quarter. Their outlook is also very positive as well for the 3rd quarter of this year.
9. Dive liveboards, although a small number responded (4), posted a gain of +13.8% 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. 70.1% of the all respondents were from the USA.
11. 75.2% of the all respondents were the facility owner or manager.

Each business category responded as follows for their [Gross Income](#) change in the 2nd quarter 2014 versus the same period in 2013:

S. America: +10.0%  
(outlook for 3rd Q:  
increase)

USA & Canada:  
+8.2%  
(outlook for 3rd Q:  
increase)

Caribbean & Mexico:  
+7.6%  
(outlook for 3rd Q:  
increase)

South  
Pacific/Asia/Indo:  
+4.0%\*  
(outlook for 3rd Q:  
increase)

> When looking at a  
combined response of  
the travel sector  
(resorts, wholesalers  
& liveaboards), the  
average company was  
up in for the 2nd  
quarter posting a  
+9.0% increase.

These same travel  
operator's believe  
their 3rd 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  
Association
- > Cayman Islands  
Watersports Assoc.

#### Gross Revenues Table

Business Classification	2nd Q '14 % Change	Number Reporting	% of Whole
Dive Retailers	+3.3%	59	47.6%
Independent Dive Instructors (# certs)	+8.8%	21	16.5%
Dive Resort or Resort-Based Dive Operators	+7.3%	14	11.3%
Dive Wholesaler/Agent or US Booking Office	n/a*	1	0.8%
Dive Related Manufacturers	+13.0%	14	11.3%
Dive Liveaboard Boat or Charter Boat	+13.8%*	4	3.2%
Dive Related Media, Publication, Website	n/a*	0	0.0%
Dive Training Agency	n/a*	2	1.6%
All Other Industry Professionals	+2.3%*	7	5.7%
<i>All Averaged/Total Respondents</i>	<i>+8.3%*</i>	<i>124*</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 2nd Quarter Gross by Time Zones (Americas):

> **Retailers were up in the east and central regions for Gross sales. Notably Travel was very strong for the second quarter in the central USA:**

Retailer Income Table Retailers' Time Zone (shows counts)	2nd Q '14 Gross Revenues	New Certs.	Travel Revenues	Equipment Revenues
Eastern Time Zone (32)	+2.7%	-2.4%	+1.7%	+2.4%
Central Time Zone (14)	+5.1%	+12.9%	+23.6%	+3.8%
Mountain Time Zone (3)*	n/a	n/a	n/a	n/a
Pacific Time Zone (8)*	-1.7%	+17.8%	+4.6%	-1.4%

\* 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 3rd Quarter 2014 Revenues Projections:

> **Retailers in general are positive about the 3rd quarter of this year. However Travel sales are anticipated to stay the same for the next quarter:**

Retailers' 3rd Q '14 Forecasts	3rd Q Increase	3rd Q Same	3rd Q Decrease
Gross Revenues	49.2%	32.2%	15.3%
Dive Certification Numbers	40.7%	27.1%	23.7%
Dive Travel Revenues	23.7%	54.2%	11.9%
Equipment Sales Revenues	42.4%	32.2%	22.0%

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 and 42nd quarter, representing almost 6,000 responses 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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