

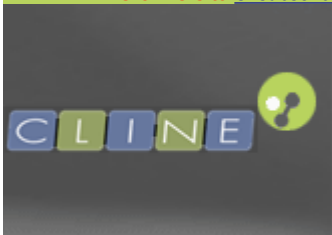
**Subject:** Cline's Diving Industry 2nd Quarter 2019 Survey Results for William Cline

**Date:** Wednesday, July 31, 2019 at 10:15:02 PM Central Daylight Time

**From:** William Cline <research@williamcline.com>

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Quick Facts:

● **On the whole, less robust than last quarter, only 35.8% of all the businesses responded that they expect their businesses to gross more in the 3rd quarter of this year vs the same period last year.**

● **Similar to last quarter, but not as strong, 44.4% of dive retailers forecast sales for the 3rd quarter of 2019 will be above the same period in 2018.**

● **Showing less confidence unlike last quarter, 40% of dive resorts and sellers of dive travel are not optimistic about their 3rd Quarter 2019 sales, saying that they think they will be less than the same period in 2018.**

● **Unlike last quarter, manufacturers are not optimistic with regards their 3rd quarter sales for 2019 as 41.7% reported they anticipate**

## Cline's Diving Industry Survey Released

### Second Quarter 2019 Dive Business Survey

Cline's Quarterly Dive Industry Survey is in and a total of 109 dive business responded to the survey and indicated the following results:

1. Dive businesses saw, on average, a 3.3% increase in their gross revenues for the 2nd quarter of 2019 versus the same period in 2018. This is compared to 2nd quarter 2018 report of a 6.3% gain for this same question.
2. New certifications were down -2.4% for retailers and independent instructors in the 2nd quarter. This is compared to 2nd quarter 2018 report of a 1.2% gain for this same question.
3. Retailers, instructors, resorts and liveboards posted 3,251 new certifications in the 2nd quarter of 2019, compared to 2,617 last quarter. Based on the average retailer that responded to this question posting 51.2 certifications per store in the 2nd quarter, and applying that to all retailers (1,400 USA est. base) then approx 71,680 new certifications were issued by USA dive retailers last quarter, vs 62,982 new certifications issued in the previous 1st quarter of 2019.
4. Retailers specifically posted a -.4% decrease in their gross revenues for last quarter, as well as a -3.6% decrease in certifications. Compared to 11.9% increase in gross and 11.1% certs for the previous quarter (1st Q, 2019).
5. Like last quarter, dive travel sales for retailers were up 11.1% in 2nd quarter travel sales (vs 20.9% increase in 1st quarter 2019).
6. Equipment sales were up, as retailers showed a 2.5% increase in sales (vs 10% in 1st Q 2019).

**gross revenues to be the same as last year for the same period.**

• **Companies from the USA and Canada, as a whole, posted a 5.6% increase in their gross revenues in the 2nd quarter (compared to 12.5% in the 1st quarter of 2019). Furthermore, 39.8% of this same group were optimistic that their 3rd quarter 2019 revenues will be higher than 2018 (compared to 43.8% in the 1st quarter of 2019).**

• **All other Companies from everywhere else in the world, other than USA and Canada, posted a -5.5% loss in their 2nd quarter gross sales (compared to a 28.8% gain in the 1st quarter 2019). Unlike last quarter only 26.1% of this same group were optimistic that their 3rd quarter 2019 revenues will be higher than 2018 (compared to 59.6% positive for the 1st quarter of 2019).**

Cline Group, Creators of:

- » Scuba Diving Magazine
- » The Cline Diving Industry Studies
- » The Scuba Tour (now DEMA's GoDiveNow Pool)

Partial Past/Current Client List:

- » The Bahamas Tourism Board
- » Bonaire's Tourism Board
- » Barbados Tourism Board
- » DeepBlu App & COSMIQ Dive Computer Company
- » DEMA's Scuba Pool
- » Grenada's Tourist Board
- » Sand Dollar Resort, Bonaire
- » Stuart Cove's Dive Bahamas
- » SEABOB/Cayago AG & USA
- » The Bahamas Diving Association

7. The two largest number of responses for retailers were 77.8% from the USA and 7.4% from Canada.
8. Again, similar to last quarter, dive travel companies posted a combined gain of 8.9% in their gross revenues for the 2nd quarter (resorts, wholesalers/travel sellers & liveaboards combined, 10 responses). This compares to 18.4% in the 1st Q of 2019.
9. Similar, dive manufacturers and sales reps posted a strong gain of 15.6% in their 2nd quarter 2019 gross revenues compared to 2018 (12 responses). This compares to 9.1% last quarter.
10. Not enough dive liveaboards and charter boats responded to tabulate accurately (2 responses)
11. 78.0% of all respondents were the facility owner or manager.

The following businesses responded to this survey:

<b>Business Classification</b>	<b>Total Respondents</b>	<b>% of Whole</b>
Dive Retailers	54	49.5%
Independent Dive Instructors	16	14.7%
Dive Resort or Resort-Based Dive Operators, Wholesaler & Liveaboards	10	9.2%
Dive Manufacturers & Reps	12	11.0%
Other Industry Professionals	10	9.2%
Dive Related Media	4	3.7%
Dive Training Agency	1	0.9%
<i>Total Respondents</i>	<i>109</i>	<i>100%*</i>

*\* - rounding may affect totals*

» Respondents were from these regions:

- 68.8% USA**
- 7.3% Canada**
- 6.4% Mexico, Central America & Caribbean**
- 5.5% Europe**
- 5.5% South Pacific/Indo Pacific**
- 1.8% South America**
- 1.8% Other Region**

» **Dive Retailers and independent instructors from the USA & Canada reported their 2nd Quarter 2019 as follows:**

**Eastern/Atlantic Time Zones 24 reporting**

**Gross Certs Travel Equipment #OW Certs**  
**7.4% .1% 14.3% 13.9% 897**

**- Positive for 3rd Quarter Gross Increases: 50.0%**

**Central Time Zone 21 reporting**

**Gross Certs Travel Equipment #OW Certs**  
**4.0% -8.6% 17.8% -5.0% 886**

**- Positive for 3rd Quarter Gross Increases: 33.3%**

**HI, Pacific Time & Mountain Zones 14 reporting\***

**Gross Certs Travel Equipment #OW Certs**  
**-2.7% -13.0% -4.9% -6.9% 693**

**- Positive for 3rd Quarter Gross Increases: 42.9%**

**\* The lower the number of responses for any reported segmentation analysis directly increases possible error rates in the data.**

**\*\* Low numbers reporting for any question in this survey should be viewed with caution due to the possible increase in error rates.**

- » Hawaiian Islands  
Recreational Scuba  
Association  
(H.I.R.S.A.)
- » Explorer Ventures Dive  
Liveboard Cruises
- » Fort Young Hotel & Dive  
Resort, Dominica
- » American Express Travel

Dear William Cline,

Thank you for reading this quarterly report! This marks the 18th year this study has been executed, and I appreciate the thousands of surveys you, as an industry, have completed over the years!

If you want to continue receiving these updates, no action is required on your part. However, if you want to be removed from this list, just click on the unsubscribe link at the bottom of this message. Thanks for subscribing to the diving industry's only independent diving research study. This quarterly email survey is sent out to the industry at no charge, in an attempt to disseminate diving research to our industry's professionals.

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.

**As many of you might know, I was DEMA's previous Vice-Chairman of the board of directors. My term expired at the end of 2017. I am eligible to run again this next election and I would like your support. I hope to represent not only the A3 Media classification membership, but everyone in our global dive industry. If you think I would make a good candidate for the next three years, please vote for me this fall in the DEMA board elections.**

Best Regards,  
*William Cline*  
President  
Cline Group Inc.  
Scuba Diving Specialists since 1990

The Diving Industry's Only Marketing, Advertising, Research and Consulting Firm with over 29 years of marketing diving worldwide. Visit us on line at <http://www.WilliamCline.com>

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