

Subject: Cline's Diving Industry 3rd Quarter 2014 Survey Results for William Cline

Date: Saturday, November 15, 2014 at 4:00:09 PM Central Standard 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 basically flat for retailers in the 3rd quarter of 2014.

> Overall, retailers responded as follows for a projected INCREASE in their 4th quarter '14 outlook for gross revenues:

Eastern US:
decrease

Central US: increase

Mountain US: n/a*

Pacific US:
Mountain US:
decrease

> Independent Instructors posted a gain for the last two quarters now, showing a +17.4% increase in certification numbers for the 3rd quarter and are optimistic for increases in the 4th quarter of 2014 as well.

Summary:

> Globally, businesses by region responded their 3rd quarter gross revenues were as follows in comparison to the same period last year:

USA & Canada:
+4.8%
(outlook for 3rd Q:
increase)

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

Cline's Diving Industry Survey Results

Third Quarter 2014 Dive Business Survey

Cline's third quarter 2014 Dive Industry Survey is completed. This survey is the 43rd consecutive quarterly survey since 2004, and a total of 105 dive businesses responded to this last survey and indicated the following results:

1. All dive businesses saw, on average, a +4.1% increase in their gross revenues for the 3rd quarter of 2014 versus the same period in 2013.
2. Retailers were slightly up, reporting +.1% increase in their overall gross revenues in the 3rd quarter of this year.
3. New certifications for retailers were up slightly, posting a +0.2% increase in certifications.
4. Independent instructors posted a stronger gain of +17.4% in certifications.
5. Just like the last two quarters, retailers posted a dive travel sales increase but much lower of +0.4% in the 3rd quarter.
6. Dive equipment sales for retailers were down, showing a -3.7% decrease in sales last quarter.
7. Dive Manufacturers were also up last quarter, as 12 companies responded with a robust +20.5% increase in sales for the 3rd quarter of 2014. Equally these respondents are positive about their 4th quarter as well.
8. Combined travel sellers, liveaboards and dive operations in resort areas posted a loss of -1.4% last quarter with a positive outlook for the 4th quarter as well.
9. Specifically resorts and tropical dive operations were down posting a -10% drop in sales for the 3rd quarter. Their outlook is neutral for the 4th quarter of this year.
10. Dive liveaboards, although a small number responded (4), posted a gain of +20% 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.)
11. 69.2% of the all respondents were from the USA.
12. 64.4% of the all respondents were the facility owner or manager.

Each business category responded as follows for their Gross Income change in the 3rd quarter 2014 versus the same period in 2013:

All other areas:
+0.5%
(outlook for 3rd Q:
increase)

> When looking at a combined response of the travel sector (resorts, wholesalers & liveaboards), the average company was down for the 3rd quarter posting a -1.4% decrease.

These same travel operator's believe their 4th 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.
 - > Fort Lauderdale Convention and Visitors Bureau (CVB)

Gross Revenues Table

Business Classification	3rd Q '14 % Change	Number Reporting	% of Whole
Dive Retailers	+0.1%	41	39.4%
Independent Dive Instructors (# certs)	+17.4%	11	10.6%
Dive Resort or Resort-Based Dive Operators	-10.0%	8	7.7%
Dive Wholesaler/Agent or US Booking Office	n/a*	2	1.9%
Dive Related Manufacturers	+20.5%	12	11.5%
Dive Liveaboard Boat or Charter Boat	+20.0%*	4	3.9%
Dive Related Media, Publication, Website	n/a*	0	0.0%
Dive Training Agency	n/a*	0	0.0%
All Other Industry Professionals	+2.3%*	12	11.5%
<i>All Averaged/Total Respondents</i>	<i>+4.1%*</i>	<i>105*</i>	<i>100%</i>

* Totals include partial responses and total may vary from the 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 4th Quarter 2014 Revenues Projections:

> Retailers in general are not optimistic about their 4th quarter of this year. However Equipment sales are anticipated to be up for the 4th quarter:

Retailers' 4th Q '14 Forecasts	4th Q Increase	4th Q Same	4th Q Decrease
Gross Revenues	31.7%	22.0%	41.5%
Dive Certification Numbers	22.0%	22.0%	41.5%
Dive Travel Revenues	17.1%	39.0%	17.1%
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 43rd quarter, representing almost 6,000 total combined 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.

Lastly, I am on the DEMA Board of Directors, and have been for the last three years. One of my priviledges as been to service as Chair of the Research Committee. We have made some wonderful strides for our industry and specifically for dive retailers. There is much more I would like to do and would like to ask your support in the upcoming DEMA elections. The Research Committee is a critical part of our industry and I look forward to working another three years with the other

members and Tom Ingram to accomplish much more.

Thank you in advance for your vote.

Best Regards,
William Cline

President

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