

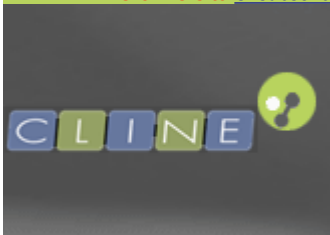
Subject: Cline's Diving Industry 1st Quarter 2019 Survey Results for William Cline

Date: Friday, April 26, 2019 at 10:15:02 PM Central Daylight Time

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Quick Facts:

● **On the whole, more robust than last quarter, 57.3% of all the businesses responded that they expect their businesses to gross more in the 2nd quarter of this year vs the same period last year.**

● **Similar to last quarter, 58.5% of dive retailers forecast sales for the 2nd quarter of 2019 will be above the same period in 2018.**

● **Showing more confidence like last quarter, 72.2% of dive resorts and sellers of dive travel are more optimistic about the 2nd Quarter of 2019 compared to 2018.**

● **Like last quarter, manufacturers are again optimistic with regards their 2nd quarter sales for 2019 as 54.5% reported they anticipate gross revenues to be above last year for the**

Cline's Diving Industry Survey Released

First Quarter 2019 Dive Business Survey

Cline's Quarterly Dive Industry Survey is in and a total of 131 dive business responded to the survey and indicated the following results:

1. Dive businesses saw, on average, a robust 17.4% increase in their gross revenues for the 1st quarter of 2019 versus the same period in 2018. This is compared to 1st quarter 2018 of 3.8% gain for this same question.
2. New certifications were up 14.3% for retailers and independent instructors in the 1st quarter. This is compared to 1st quarter 2018 of -3.1% loss for this same question.
3. Retailers, instructors, resorts and liveboards posted 2,617 new certifications in the 1st quarter of 2019, compared to 3,561 last quarter (4th 2018). Based on the average retailer that responded to this question posting 44.9 certifications per store in the 1st quarter, and applying that to all retailers (1,400 USA est. base) then approx 62,982 new certifications were issued by USA dive retailers last quarter, vs 70,560 new certifications issued in the previous 4th quarter of 2018.
4. Retailers specifically posted a 11.9% increase in their gross revenues for last quarter, as well as a very strong 11.1% increase in certifications. Compared to 1.7% in gross and 5% certs for the previous quarter (4th, 2018).
5. Like last quarter, dive travel sales for retailers were up 20.9% in 1st quarter travel sales (vs 3.2% increase in 4th quarter 2018).
6. Equipment sales were also up, as retailers showed a 10.0% increase in sales (vs 5.2% in 4th Q 2018).

same period.

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

• **All other Companies from everywhere else in the world, other than USA and Canada, posted a 28.8% gain in their 1st quarter gross sales. Slightly more than the USA/Canada, 59.6% of this same group were optimistic that their 2nd quarter 2019 revenues will be higher than 2018.**

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

7. The two largest number of responses for retailers were 83.1% from the USA and 9.2% from Canada.
8. Again, like last quarter and even stonger, dive travel companies posted a strong combined gain of 18.4% in their gross revenues for the 1st quarter (resorts, wholesalers/travel sellers & liveboards combined, 19 responses). This compares to 15.8% in the 4th Q of 2018.
9. Similar, dive manufacturers and sales reps posted a strong gain of 9.1% in their 1st quarter 2019 gross revenues compared to 2018 (12 responses). This compares to 6.3% last quarter in 2018.
10. Not enough dive liveboards and charter boats responded to tabulate accurately.
11. 76.0% of all respondents were the facility owner or manager.

The following businesses responded to this survey:

Business Classification	Total Respondents	% of Whole
Dive Retailers	66	50.4%
Independent Dive Instructors	20	15.3%
Dive Resort or Resort-Based Dive Operators, Wholesaler & Liveboards	20	15.3%
Dive Manufacturers & Reps	12	9.2%
Other Industry Professionals	10	7.6%
Dive Related Media	1	.8%
Dive Training Agency	2	1.5%
Total Respondents	131	100%*

* - rounding may affect totals

» **Respondents were from these regions:**

- 69.5% USA**
- 10.7% Mexico, Central America & Caribbean**
- 7.6% Canada**
- 6.9% Europe**
- 3.1% South Pacific/Indo Pacific**
- 1.5% South America**
- 0.8% Other Region**

» **Dive Retailers and independent instructors from the USA & Canada reported their 1st Quarter 2019 as follows:**

Eastern/Atlantic Time Zones 39 reporting

Gross Certs 20.0% Travel 17.8% Equipment 26.7% #OW Certs 15.4% 609

- Positive for 2nd Quarter Gross Increases: 56.1%

Central Time Zone 19 reporting

Gross Certs 3.2% Travel 6.1% Equipment 15.7% #OW Certs 1.2% 307

- Positive for 2nd Quarter Gross Increases: 36.8%

HI, Pacific Time & Mountain Zones 18 reporting*

Gross Certs 10.6% Travel 11.3% Equipment 12.0% #OW Certs 10.8% 916

- Positive for 2nd Quarter Gross Increases: 60.0%

*** 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.**

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.

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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