

**Subject:** Cline's Diving Industry 3rd Quarter 2015 Survey Results for William Cline

**Date:** Sunday, December 13, 2015 at 12:45:05 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 up for retailers in the 3rd quarter of 2015.**

**Summary:**

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

Caribbean, Mexico, Central & South America: +23.2% (outlook for 4th Q '15: increase)

USA & Canada: +9.5% (outlook for 4th Q '15: increase)

South Pacific Tropical Asia: +7.7% (outlook for 4th Q '15: increase)

Europe: +6.7% (outlook for 4th Q '15: increase)

> When looking at a combined response of the travel sector (resorts, wholesalers & liveaboards), the average company was up for the 3rd quarter posting a +14.0% increase.

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

## Cline's Diving Industry Survey Results

### Third Quarter 2015 Dive Business Survey

Cline's Third quarter 2015 Dive Industry Survey is completed. This survey is the 47th consecutive quarterly survey since 2004, and a total of 200 dive businesses responded to this last survey and indicated the following results:

1. All dive businesses saw, on average, a +10.7% increase in their gross revenues for the 3rd quarter of 2015 versus the same period in 2014.
2. Retailers were up, reporting a robust +9.4% increase in their overall gross revenues in the 3rd quarter of this year.
3. New certifications for retailers were up, posting a strong +11.5% increase in certifications. Independent dive instructors posted a small gain of +2.1% in certifications as well.
4. Similar to the last four quarters, retailers posted a dive travel sales increase of +6.5% in the 3rd quarter.
5. Dive equipment sales for retailers were up as well, showing a +5.0% increase in sales last quarter.
6. Dive Manufacturers were also up last quarter, as 8 companies responded with a robust 16.9% increase in sales for the 3rd quarter of 2015. Equally these respondents are positive about their 4th quarter of 2015 as well. (Note the number responding is very low, so error rate makes this number for reference only and may not indicate all within this classification.)
7. All dive travel, resorts, tropical dive operations, liveaboards and dive travel sellers posted a combined +14.0% increase in gross sales. Their outlook is also positive for the 4th quarter of 2015.
8. Dive liveaboards, although a small number responded (5), posted a loss of -1.6% for the same period. (Note the number responding is very low, so error rate makes this number for reference only and may not indicate all within this classification.)
9. 75.2% of the all respondents were from the USA.
10. 68.7% of the all respondents were the facility owner or manager.

These same travel operators believe their 4th quarter 2015 gross sales projections will increase as well.

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)

Each business category responded as follows for their Gross Income change in the 3rd quarter 2015 versus the same period in 2014:

<b>Gross Revenues Table</b>			
<b>Business Classification</b>	<b>3rd Q '15 % Change</b>	<b>Number Reporting</b>	<b>% of Whole</b>
Dive Retailers	+9.4%	60	41.4%
Independent Dive Instructors (# certs)	-14.8%	31	21.4%
Dive Resort or Resort-Based Dive Operators	+22.5%*	8	5.5%
Dive Wholesaler/Agent or US Booking Office	+15.5%*	6	4.1%
Dive Related Manufacturers	+16.9%*	8	5.5%
Dive Liveaboard Boat or Charter Boat	-1.6%*	5	3.4%
Dive Related Media, Publication, Website	+3.0%*	5	3.4%
Dive Training Agency	+6.5%*	4	2.8%
All Other Industry Professionals	<u>+4.5%</u>	<u>18</u>	12.4%
<i>All Averaged/Total Respondents</i>	<i>+10.7%*</i>	<i>200*</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 2015 Revenues Projections:**

**> In spite of posting positive results this last quarter, Retailers in general have mixed optimism about their 4th quarter sales for this year:**

<b>Retailers' 4th Q '15 Forecasts</b>	<b>4th Q Increase</b>	<b>4th Q Same</b>	<b>4th Q Decrease</b>
Gross Revenues	35.0%	30.0%	33.33%
Dive Certification Numbers	21.7%	31.7%	45.8%
Dive Travel Revenues	25.0%	40.0%	33.33%
Equipment Sales Revenues	36.7%	28.3%	33.3%

Error Rates: Data presented is calculated to have an average error rates of 4.9% 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 4.9% of what is shown on this survey.

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As I enter the 12th year and 47th survey, representing over 6,000 total combined responses for this industry survey, I hope you will read each one, send me questions.

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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