

**Subject:** Cline's Diving Industry 3rd Quarter 2018 Survey Results for William Cline

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Quick Facts:

● **On the whole, like last quarter, 45.1% of all the businesses responded that they expect their businesses to gross more in the 4th quarter of this year vs the same period last year.**

● **Similar to last quarter, 49.0% of Dive Retailers Forecast Sales for the 4th Quarter of 2018 will be above the same period in 2017.**

● **Showing more confidence like last quarter, 52.9% of Dive Resorts and Sellers of Dive Travel are more optimistic about the 4th Quarter of 2018 compared to 2017.**

● **Like last quarter, manufacturers are again optimistic with regards their 4th Quarter sales for 2018 as 50.0% reported they anticipate gross revenues to be above last year for the same period.**

## Cline's Diving Industry Survey Released

### Third Quarter 2018 Dive Business Survey

Cline's Quarterly Dive Industry Survey is in and a total of 113 dive business responded to the survey and indicated the following results:

1. Dive businesses saw, on average, a 14.8% increase in their gross revenues for the 3rd Quarter of 2018 versus the same period in 2017. The Year-To-Date average for 1st, 2nd & now 3rd quarter is **8.3% for the global industry as a whole.**
2. New certifications were up posting a 4.5% increase for Retailers and Independent Instructors in the 3rd quarter. The Year-To-Date average for 1st, 2nd & now 3rd quarter is **0.9% for retailers and independent instructors so far in 2018 as a whole.**
3. Retailers specifically posted a 8.7% increase in their gross revenues for the quarter, but only a .5% increase in certifications. The Year-To-Date average for 1st, 2nd & now 3rd quarter gross is **3.8% for retailers in 2018 as a whole.**
4. Unlike last quarter, Dive Travel Sales for retailers were up showing a robust 10.4% increase in the 3rd quarter. The Year-To-Date average for 1st, 2nd & now 3rd quarter is **5.5% for retailer travel sales in 2018 as a whole.**
5. Equipment sales were also up, as Retailers showed a 6.9% increase in sales. The Year-To-Date average for 1st, 2nd & now 3rd quarter is **1.8% for retailer equipment sales in 2018 as a whole.**
6. The two largest number of responses for retailers were 81.6% from the USA and 10.2% from Canada.
7. Dive travel companies posted strong combined gain of 19.5% in their gross revenues for the 3rd quarter (resorts, wholesalers/travel sellers & liveboards)

- 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.com App/Social Media Website & 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

combined, 14 responses). The Year-To-Date average for 1st, 2nd & now 3rd quarter is **9.3% for travel companies in 2018 as a whole.**

8. Similar, dive manufacturers posted a significant gain of 24.5% in their 3rd quarter 2018 gross revenues compared to 2017 (16 responses). The Year-To-Date average for 1st, 2nd & now 3rd quarter is **14.8% for manufacturers in 2018 as a whole.**
9. Not enough dive liveboards or charter boats responded to tabulate accurately, but the three that did respond posted a -0.5% decrease in their gross sales.
10. Companies from the USA and Canada, as a whole, posted a 13.9% increase in their Gross Revenues in the 3rd quarter. Furthermore, 44.7% of this same group were optimistic that their 4th quarter 2018 revenues will be higher than 2017.
11. All other Companies from everywhere else in the world, other than USA and Canada, posted a 18.0% gain in their 3rd quarter gross sales. Slightly more than the USA/Canada, 46.4% of this same group were optimistic that their 4th quarter 2018 revenues will be higher than 2017.
12. 79.7% 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	49	43.4%
Independent Dive Instructors	19	16.8%
Dive Resort or Resort-Based Dive Operators, Wholesaler & Liveboards	17	15.1%
Dive Related Manufacturers	16	14.6%
Other Industry Professionals	5	4.4%
Dive Related Media	3	2.7%
Dive Training Agency	4	3.5%
<i>Total Respondents</i>	<i>113</i>	<i>100%*</i>

*\* - rounding may affect totals*

» Respondents were from these areas:

- 65.5% USA**
- 9.7% Canada**
- 12.4% Mexico, Central America & Caribbean**
- 3.5% South Pacific/Indo Pacific**
- 5.3% Europe**
- 0.0% South America**
- 0.9% Non-Tropical Asia**
- 2.7% Other Region**

» Dive Retailers and independent instructors from the USA & Canada reported their 3rd Quarter 2018 as follows:

**Eastern/Atlantic Time Zones 31 reporting**  
**Gross Certs Travel Equipment**  
**17.8% 7.6% 12.2% 8.2%**  
**Positive for 4th Quarter Gross Increases: 48.4%**

**Central Time Zone 18 reporting**  
**Gross Certs Travel Equipment**  
**1.2% -1.5% 4.4% 4.6%**  
**Same for 4th Quarter No Increase/Loss: 50.0%**

**Pacific Time & Mountain Zones 13 reporting\***

**Gross Certs Travel Equipment**

**9.1% 7.4% 12.0% 4.3%**

**Positive for 3rd Quarter Gross Increases: 69.2%**

**\* 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 16th 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 28 years of marketing diving worldwide. Visit us on line at <http://www.WilliamCline.com>

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