

**Subject:** Cline's Diving Industry 4th Quarter 2014 Survey Results for William Cline

**Date:** Monday, April 27, 2015 at 10:10:02 AM Central Daylight Time

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

**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 4th quarter of 2014.**

**Summary:**

> Globally, businesses by region responded their 4th quarter gross revenues were as follows in comparison to the same period last year:

USA & Canada:  
+3.1%  
(outlook for 1st Q '15: increase)

All other areas:  
+23.3%  
(outlook for 1st Q '15: increase)

> When looking at a combined response of the travel sector (resorts, wholesalers & liveaboards), the average company was up for the 4th quarter posting a +11.5% increase.

These same travel operators believe their 1st quarter 2015 gross sales projections will increase as well.

Cline Group's Projects:

> Launched Scuba

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

## Cline's Diving Industry Survey Results

### Fourth Quarter 2014 Dive Business Survey

Cline's fourth quarter 2014 Dive Industry Survey is completed. This survey is the 44th consecutive quarterly survey since 2004, and a total of 95 dive businesses responded to this last survey and indicated the following results:

1. All dive businesses saw, on average, a +5.7% increase in their gross revenues for the 4th quarter of 2014 versus the same period in 2013.
2. Retailers were up, reporting a robust +9.6% increase in their overall gross revenues in the 4th quarter of this year.
3. New certifications for retailers were up slightly, posting a +1.5% increase in certifications.
4. Just like the last two quarters, retailers posted a dive travel sales increase of +9.5% in the 4th quarter.
5. Dive equipment sales for retailers was slightly down, showing a -0.3% decrease in sales last quarter.
6. Dive Manufacturers were also up last quarter, as 11 companies responded with a +4.1% increase in sales for the 4th quarter of 2014. Equally these respondents are positive about their 1st quarter of 2015 as well.
7. All travel, resorts and tropical dive operations, liveaboards and dive travel sellers posted a combined +11.5% increase in gross sales. Their outlook is also positive for the 1st quarter of 2015.
8. Dive liveaboards, although a small number responded (4), posted a gain of +7.5% 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.)
9. 81.1% of the all respondents were from the USA.
10. 75.8% of the all respondents were the facility owner or manager.

Each business category responded as follows for their Gross Income change in the 4th quarter 2014 versus the same period in 2013:

- 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	4th Q '14 % Change	Number Reporting	% of Whole
Dive Retailers	+9.6%	44	46.3%
Independent Dive Instructors (# certs)	-14.8%	17	17.9%
Dive Resort or Resort-Based Dive Operators	+14.0%	7	7.4%
Dive Wholesaler/Agent or US Booking Office	n/a*	2	2.1%
Dive Related Manufacturers	+4.1%	11	11.6%
Dive Liveaboard Boat or Charter Boat	+7.5*	4	4.2%
Dive Related Media, Publication, Website	n/a*	2	2.1%
Dive Training Agency	n/a*	4	4.2%
All Other Industry Professionals	+0.8%*	4	4.2%
<i>All Averaged/Total Respondents</i>	<i>+5.7%*</i>	<i>95*</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 1st Quarter 2015 Revenues Projections:

> Retailers in general are optimistic about their 1st quarter of this year:

Retailers' 4th Q '14 Forecasts	1st Q Increase	1st Q Same	1st Q Decrease
Gross Revenues	50.0%	31.6%	18.4%
Dive Certification Numbers	47.4%	36.8%	15.8%
Dive Travel Revenues	39.5%	44.7%	15.8%
Equipment Sales Revenues	42.1%	42.1%	15.8%

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 44th quarter, representing over 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.

Thank you in advance for your vote.

Best Regards,  
 William Cline  
 President  
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