

**Subject:** Cline's Diving Industry 4th Quarter 2018 Survey Results for Wm Cline GM  
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Quick Facts:

- **On the whole, more robust than last quarter, 54.6% of all the businesses responded that they expect their businesses to gross more in the 1st quarter of this year vs the same period last year.**

- **Similar to last quarter, 54.2% of dive retailers forecast sales for the 1st quarter of 2019 will be above the same period in 2018.**

- **Showing more confidence like last quarter, 55.0% of dive resorts and sellers of dive travel are more optimistic about the 1st Quarter of 2019 compared to 2018.**

- **Like last quarter, manufacturers are again optimistic with regards their 1st quarter sales for 2019 as 76.5% reported they anticipate gross revenues to be above last year for the**

## Cline's Diving Industry Survey Released

### Fourth Quarter 2018 Dive Business Survey

Cline's Quarterly Dive Industry Survey is in and a total of 110 dive business responded to the survey and indicated the following results:

1. Dive businesses saw, on average, a 3.7% increase in their gross revenues for the 4th quarter of 2018 versus the same period in 2017. The year average for 1st, 2nd, 3rd & 4th quarter is **4.6% for the global industry as a whole.**
2. New certifications were up down -1.5% for retailers and independent instructors in the 4th quarter. The year average for 1st, 2nd, 3rd & 4th quarter new certifications is **0.3% for retailers and independent instructors YTD 2018.**
3. Retailers, instructors, resorts and liveboards posted 3,561 new certifications in the 4th quarter of 2018. Based on the average retailer posting 50.4 certifications per store in the 4th quarter, and applying that to all retailers (1,400 USA est. USA base) then approx 70,560 new certifications were issued by USA dive retailers last quarter.
4. Retailers specifically posted a 1.7% increase in their gross revenues for the quarter, but a very strong 5% increase in certifications. The year average for 1st, 2nd, 3rd & 4th quarter dive retailers gross revenue change is **3.3% for retailers in 2018 as a whole.**
5. Like last quarter, dive travel sales for retailers were up showing a modest 3.2% increase in the 4th quarter travel sales. The year average for 1st, 2nd, 3rd & 4th quarter is **4.9% for retailer travel sales in 2018 as a whole.**
6. Equipment sales were also up, as retailers showed a 5.2% increase in sales. The year average for 1st, 2nd,

same period.

• **Companies from the USA and Canada, as a whole, posted a 4.0% increase in their gross revenues in the 4th quarter. Furthermore, 51.1% of this same group were optimistic that their 1st quarter 2019 revenues will be higher than 2018.**

• **All other Companies from everywhere else in the world, other than USA and Canada, posted a 2.2% gain in their 4th quarter gross sales. Significantly more than the USA/Canada, 70.0% of this same group were optimistic that their 1st 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.com 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.)

3rd & 4th quarter is **2.6% for retailer equipment sales in 2018 as a whole.**

7. The two largest number of responses for retailers were 93.8% from the USA and 4.2% from Canada.
8. Again, like last quarter and following general leisure travel trends, dive travel companies posted a strong combined gain of 15.8% in their gross revenues for the 4th quarter (resorts, wholesalers/travel sellers & liveboards combined, 20 responses). The year average for 1st, 2nd, 3rd & 4th quarter is **10.9% for travel companies in 2018 as a whole.**
9. Similar, dive manufacturers posted a strong gain of 6.3% in their 4th quarter 2018 gross revenues compared to 2017 (17 responses). The year average for 1st, 2nd, 3rd & 4th quarter is **12.7% for manufacturers in 2018 as a whole.**
10. Not enough dive liveboards and charter boats responded to tabulate accurately, but the three that did respond posted a 21.3% increase in their 4th quarter gross sales.
11. 82.7% of all respondents were the facility owner or manager.

The following businesses responded to this survey:

Business Classification	Total Respondents	% of Whole
Dive Retailers	48	43.6%
Independent Dive Instructors	12	10.9%
Dive Resort or Resort-Based Dive Operators, Wholesaler & Liveboards	20	18.1%
Dive Related Manufacturers	17	15.5%
Other Industry Professionals	9	8.2%
Dive Related Media	1	n/a
Dive Training Agency	3	2.7%
<b>Total Respondents</b>	<b>110</b>	<b>100%*</b>

\* - rounding may affect totals

» **Respondents were from these regions:**

- 78.2% USA**
- 9.1% Mexico, Central America & Caribbean**
- 3.6% Canada**
- 3.6% Europe**
- 2.7% South Pacific/Indo Pacific**
- 1.8% Non-Tropical Asia**
- 0.9% South America**
- 0.0% Other Region**

» **Dive Retailers and independent instructors from the USA & Canada reported their 4th Quarter 2018 as follows:**

**Eastern/Atlantic Time Zones 33 reporting**  
**Gross Certs Travel Equipment #OW Certs**  
**7.5% -.1% 2.8% 9.9% 730**  
**Positive for 1st Quarter Gross Increases: 50.0%**

**Central Time Zone 15 reporting**  
**Gross Certs Travel Equipment #OW Certs**  
**-9.5% 2.3% -4.9% -14.5% 496**  
**Positive for 1st Quarter Gross Increases: 46.7%**

»Explorer Ventures Dive  
Liveboard Cruises  
»Fort Young Hotel & Dive  
Resort, Dominica  
»American Express Travel

**Pacific Time & Mountain Zones 9 reporting\***  
**Gross Certs Travel Equipment #OW Certs**  
**4.4% 4.3% 15.0% 2.6% 703**  
**Positive for 1st Quarter Gross Increases: 55.6%**

**\* 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 Wm Cline GM,

Thank you for reading this quarterly report! This marks the 17th 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

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