



ISCA & NCA SHOW CAVE SURVEY 2026

SURVEY REPORT

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1.1. Overview

In November 2025, the International Show Caves Association (ISCA) and the US National Caves Association (NCA) agreed to conduct a new tracking survey (the fourth edition) of the show cave business in order to track its state. Juan José Tiscar Moya (ISCA Secretary) was in charge of the study.

The following projections compare results with previous surveys.

	FY 2019	FY 2021	FY 2023	FY 2025	Average
Revenue	\$1.93 B	\$2.00 B	\$3.60 B	\$2.29 B	\$2.46 B
Visits	144 M	98 M	108 M	97 M	112 M
Employees	61 K	49 K	48.6 K	39 K	49,4 K

Compared to FY 2023, projections show a decrease, especially as regards revenue. Compared to FY 2021, revenue has increased while similar numbers are found regarding visits and employees. Results are stable when compared to average numbers.

1.2. Methodology

The following parameters were taken into account:

- The questionnaire replicated previous surveys.
- An invitation to all ISCA membership (and non-members) was sent periodically from Jan. 1, 2026 through Apr. 30, 2026, when the survey was closed.
- The data reported by show caves refer to the year prior to the survey being conducted, being the data FY 2025 the one provided for this analysis (survey 2026).
- Projections are based on an estimate of 1,500 show caves worldwide. Consequently, they do not necessarily represent all show caves, especially taking into account the different variables.
- Currency conversion was taken into account as described in the separate files.
- All monetary values have been converted to U.S. dollars based on the official exchange rates valid on May 3, 2026 for standardization purposes. These include:
 - 1 EUR = 1.1721 USD
 - 1 GBP = 1.360 USD

- 1 NZD = 0,59 USD
- 1 AUD = 0,72 USD
- 1 AMD = 0,0027 USD
- Data collection as regards open items was translated into English.
- Surveys details are described on the following pages.

- **2020 survey (FY 2019)**

- 101 responses; 101 show caves; 20 countries.
- English only.
- Six China show cave responses. No representation in 2022 or 2024 surveys.
- Revenue reported in 100,000 increments, rather than write-in exact amount, so averages were estimated.
- One cave reported 2,500 employees but low revenue and attendance, which significantly affected the original estimate (adjusted to 25).

- **2022 survey (FY 2021)**

- 127 responses; 152 show caves; 24 countries.
- English only.
- Higher proportion of moderate size show caves (35% \$100K-\$500K revenue).
- Two countries reported one total for multiple locations. Previous reports divided the total reported into equal proportions. This resulted in lower averages (Czech Republic 14 locations; Slovakia 13 locations).

- **2024 survey (FY 2023)**

- 104 responses; 104 show caves; 19 countries.
- Available in 5 languages (English, German, French, Italian & Spanish).
- Open-ended revenue, attendance, staff & student actual numbers reported.
- Emailed invitations were sent by ISCA leadership on May 10th, followed by four reminders. The survey closed on Dec. 21, 2024.
- Increase in numbers could be due to the larger proportion of big-sized businesses providing data.

- **2026 survey (FY 2025)**

- 91 responses; 112 show caves; 18 countries.
- Available in 5 languages (English, German, French, Italian & Spanish).
- Data reported representing multiple show caves was divided equally, which could result in lower averages (Slovakia 13; Australia 10; Spain 3; France 2).

	FY 2021	FY 2023	FY 2025
Respondents	127	104	91

Seasonality

Year round (≥10 months)	66 %	54 %	79 %
Seasonally (lower period)	29 %	46 %	21 %
Other	5 %		

Management

Privately owned/operated	52 %	54 %	46 %
Government owned/ operated	25 %	17 %	40 %
Other	23 %	29 %	14 %

Geographic

Europe	54 %	61 %	58 %
USA	37 %	32 %	29 %
Asia	No data	No data	1 %
Other	9 %	7 %	12 %

Averages

Attendance	65K	72K	64K
Revenue*	\$1.45 M	\$2.51 M	\$1.5 M
Employees	33	32	26
School children	3.1K	6.5K	7.6K

**FY 2021 (\$1.3 M) and FY 2023 (\$2.4 M) corrected for inflation*

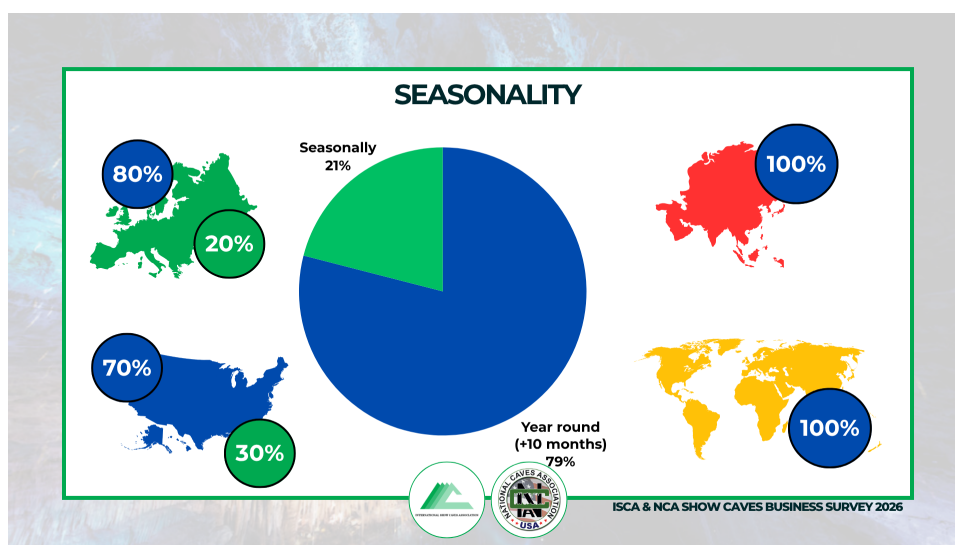
**FY 2020 not included as it did not request the exact same data*

1.3. Findings

Although the number of respondents has gradually decreased over time, the number of show caves represented is higher in FY 2025 than in FY 2023, and dataset continues to provide substantial international representation.

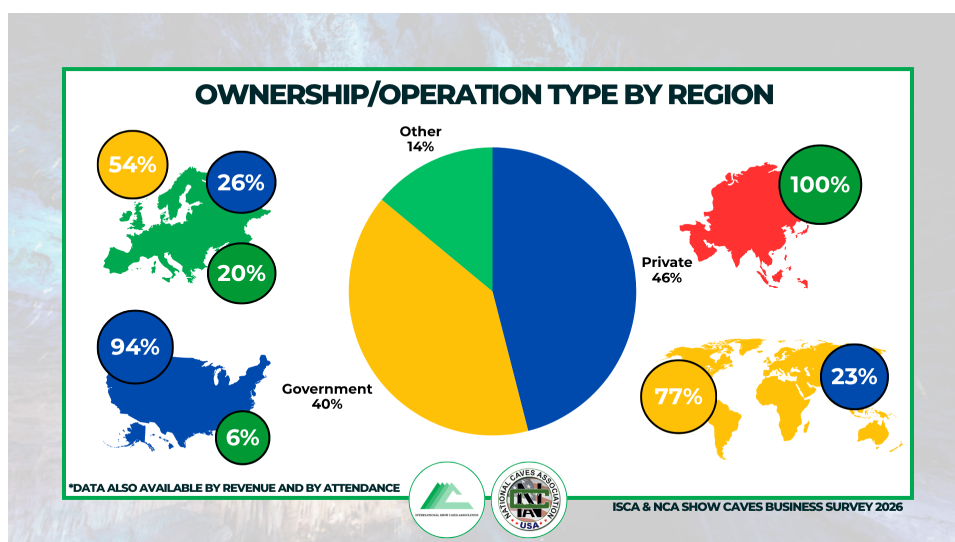
- **Seasonality**

The proportion of caves operating year round increased significantly in FY 2025, reaching 79% of respondents. This represents a major shift compared with FY 2023, when less than 55% of caves operated continuously. The reduction in seasonal operations suggests greater operational stability, stronger tourism demand throughout the year, and deseasonalization of the peak season.



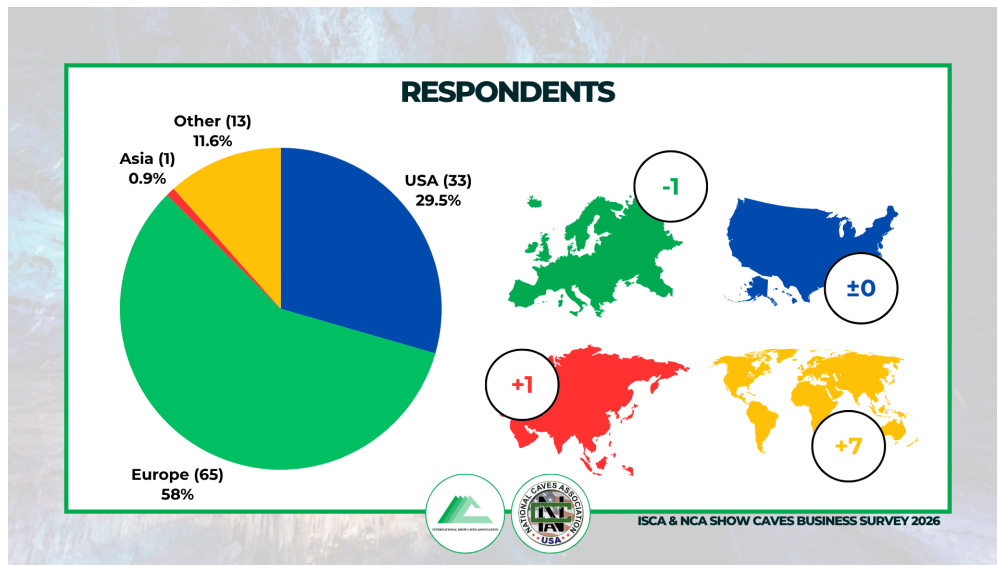
- **Management**

Private ownership continues to represent the largest management model globally; however, FY 2025 shows a substantial increase in government-operated caves, rising to 40% of respondents. This may indicate increased public investment in cave tourism, stronger heritage protection policies, and greater institutional involvement in natural and geological tourism management.



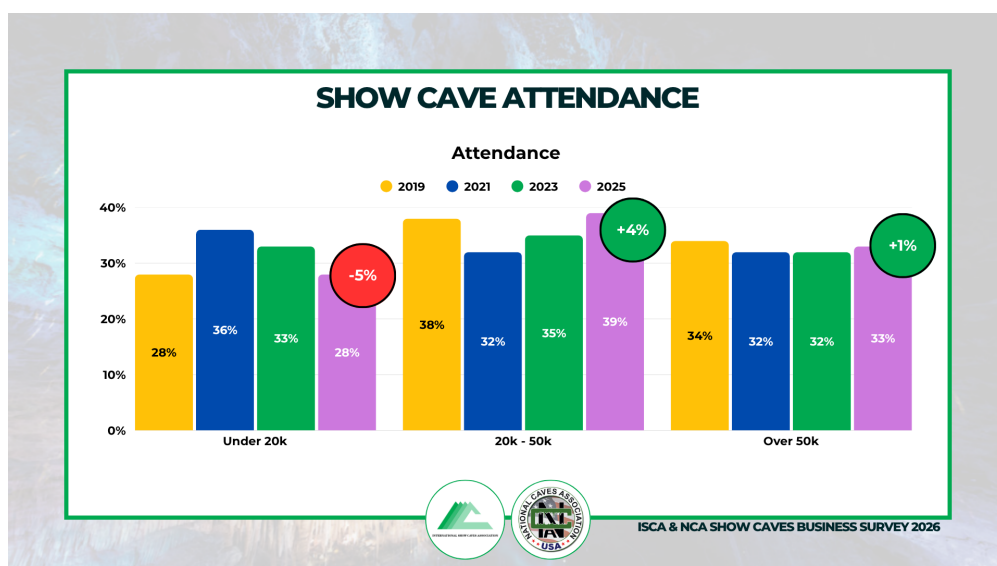
- **Geographic distribution**

Europe remains the dominant region represented in the survey, accounting for 58% of respondents in FY 2025. The United States continues to represent a significant portion of the global cave tourism industry (29.5%). The increase in responses from “Other” is mainly represented by Australia.



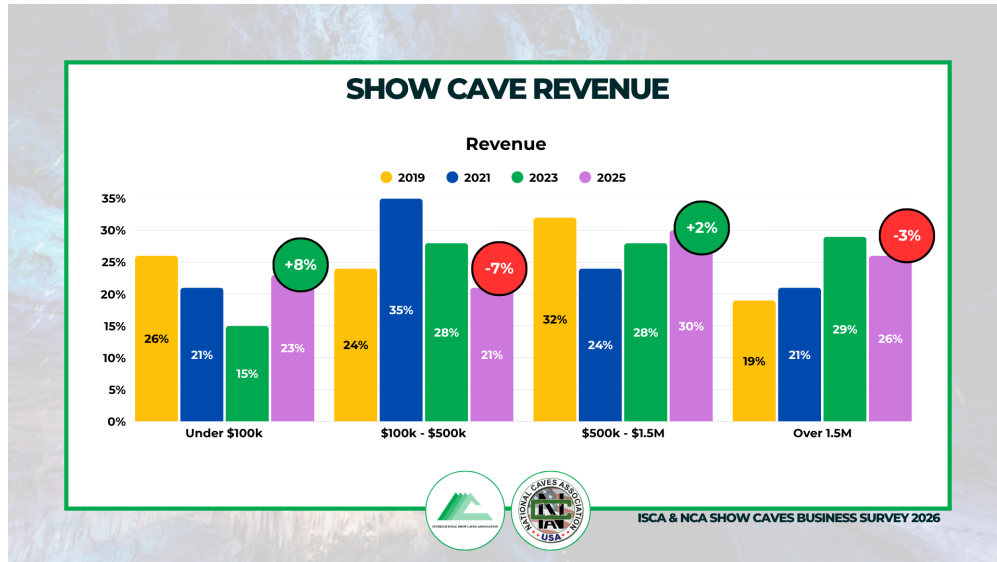
- **Attendance Trends**

Average attendance remained relatively stable across the three survey periods. When comparing results, FY 2025 show big similarities with those from the FY 2019 (pre-pandemic data).



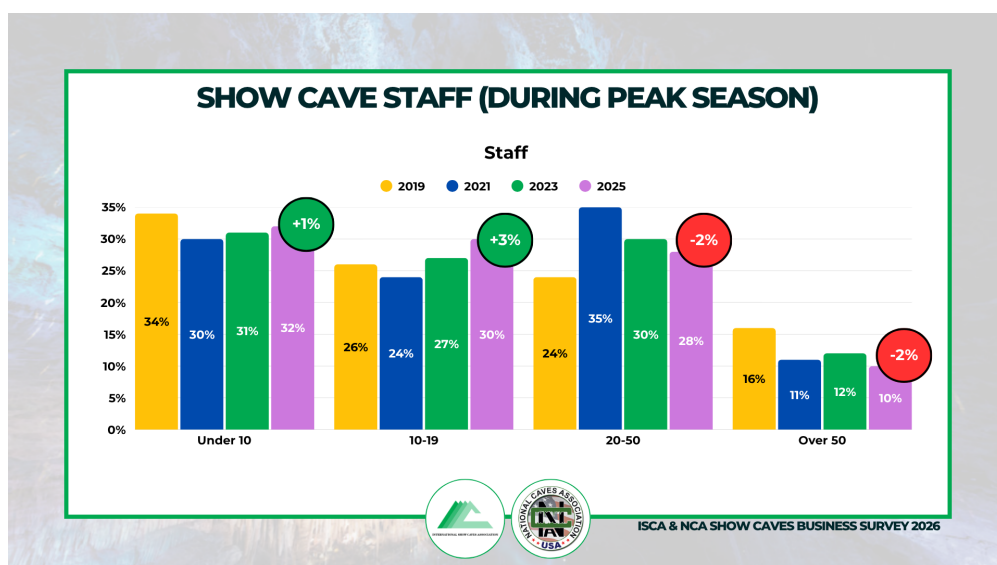
• Revenue Analysis

Show caves with a revenue under \$100k and from \$500k-\$1.5M increased, while those from \$100k-\$500k and over \$1.5M decreased, showing slight differences and suggesting continued economic resilience within the show cave business.



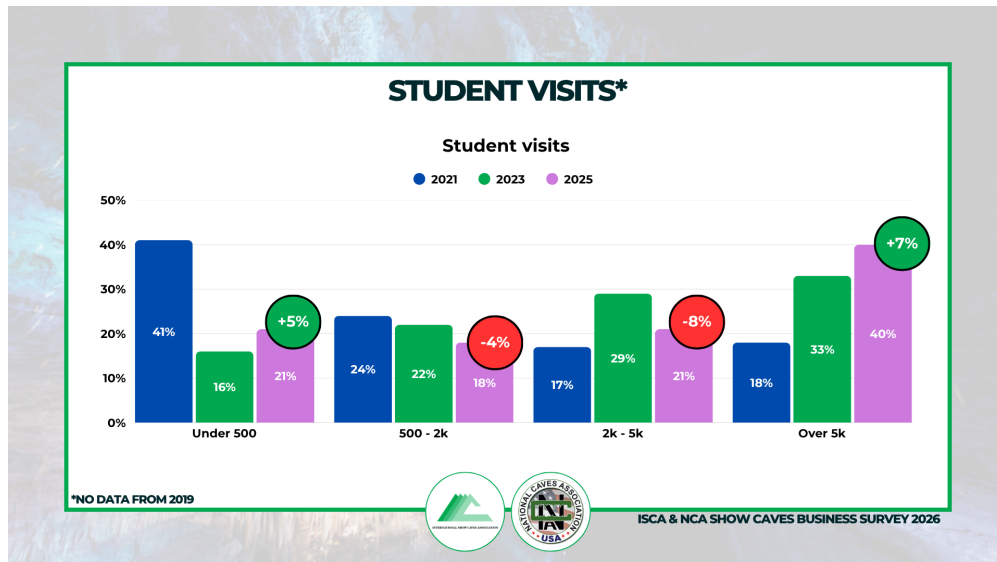
• Employment Impact

As in the previous fields, the number of staff during the peak season does not show big differences across surveys. However, show caves with 1-19 employees (categories #1 and #2) increased, whereas those with over 20 employees (categories #3 and #4) shared lower numbers.



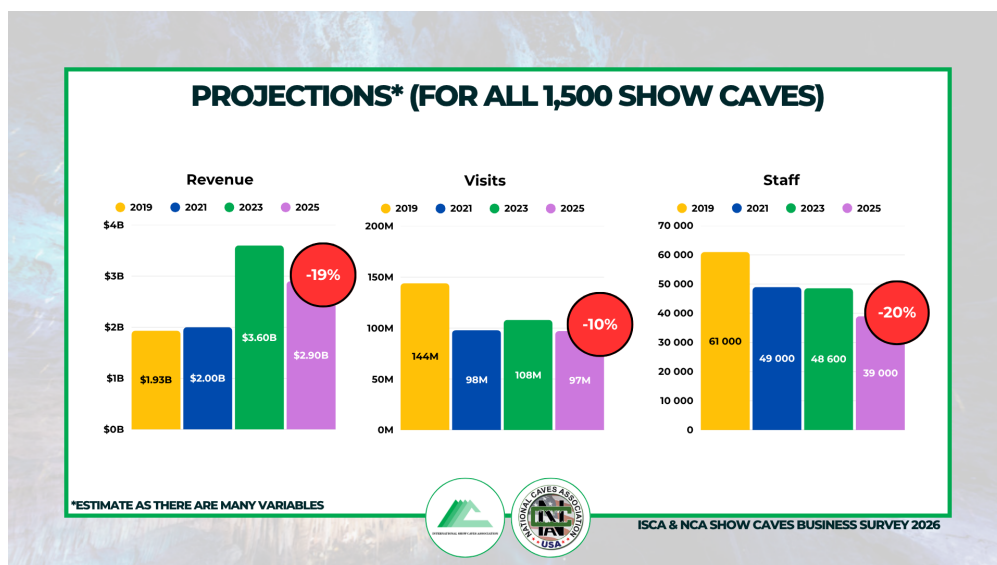
- **Educational Tourism**

School visitation continued growing and represents the data with a largest increase when compared to previous results. Even though medium categories shared a slight decrease, show caves with over 5,000 school visits increased by 7% from the survey FY 2023.



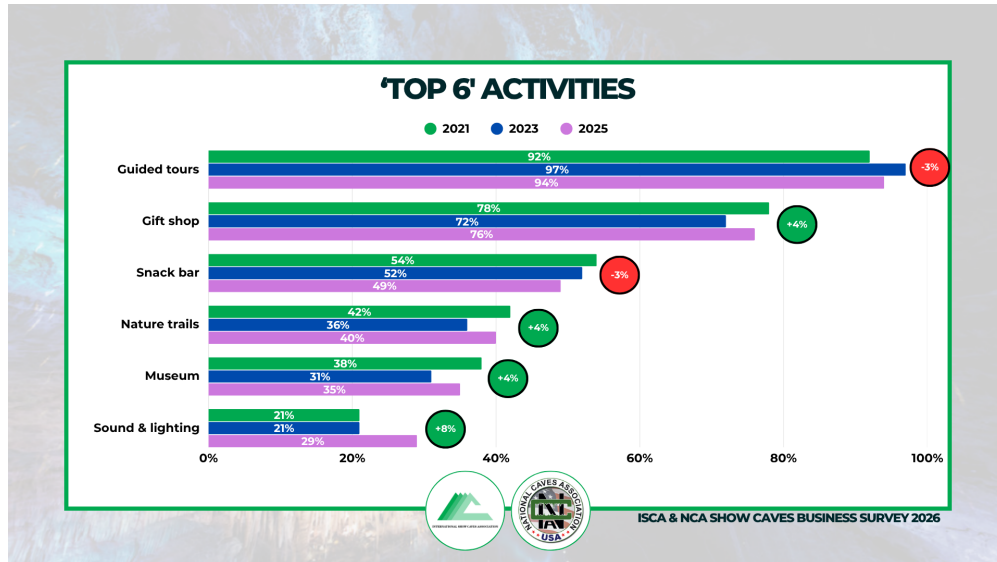
- **Projections**

The projections indicate a slight decrease across all key indicators, including revenue, visitor numbers, and staffing levels. This trend may be attributable to differences in the size categories of the respondents participating in this survey compared with previous editions. It should also be noted that the preceding survey reported exceptionally high figures in these areas relative to earlier surveys, which may further explain the apparent decline.



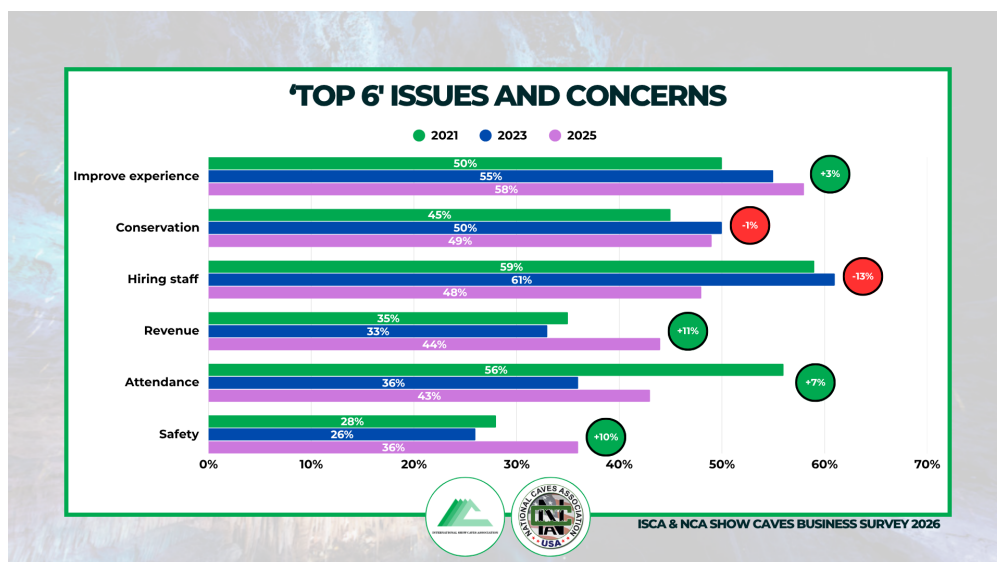
• Activities

Guided tours (1), gift shops (2) and snack bars (3) are the top 3 of activities in show caves, followed by nature trails (4), museums (5) and sound and lighting shows (6).



• Issues

Top issues include are the same as in previous years. Improving experience (1) becomes top issue, followed by conservation (2) and hiring staff (3). So far, hiring staff had been top issue in the previous surveys. Other issues include increasing revenue (4), increasing attendance (5) and visitors' safety (6).



In addition to the previous issues, respondents also shared the following comments:

- Hydrological conditions/abyss.
- Rising business costs.
- Lack of electricity, being main source a petrol generator, plus weak internet signal.
- Finding more volunteers to guide our guests.
- Policy/process improvement.
- Shifting peak season demand to shoulder season.
- Insufficient access road and poor public infrastructures.

- **Plans**

To see all future plans for year 2027, please see file '*03 2026 Survey Data*'. Some of the plans shared by respondents include:

- Limitation of short tours due to cave protection and easier organization.
- Temporary and fixed exhibitions.
- New tours and activities/experiences.
- Improvement of infrastructures.
- Facilities upgrade/relocation.
- Upgrading cave lighting.
- Enhancing the cave's scientific studies, tech integration, education, and public engagement.
- Transforming visitor experience from passive viewing to active learning and exploration.
- Celebrating 100th anniversary.
- Celebrating America250.
- Reorganization of staff and technologies.
- Boosting social media marketing.
- Innovating.

- Adding a pottery studio.
- Increasing the added value of the cave visit experience.
- Finishing conditioning and improvement works, including access and surroundings.
- Improving the interior of the cave.
- Social media promotion.
- Initiating actions planned in 2026.
- Continuing preventive conservation plan and maintain visiting schedule.
- Staff training and development to achieve high standards.
- Building a café and restrooms.
- Creating music and/or conference spaces.
- Offering classic carbide lamp tours.
- Implementing AI for real-time language translation.
- Implementing online ticket reservation systems.
- Starting ALCOTRA (Latin Alps Cross-Border Cooperation) projects.
- Replacing entrance signs.

To see all data, please check file '03 2026 Survey Data', which is available to download at the ISCA website.

1.4. Conclusions

The FY 2025 survey demonstrates that the global cave tourism industry remains stable, economically relevant, and increasingly diversified. Key findings include strong year-round operational growth, increased government participation, stable attendance levels, resilient revenue performance, and significant expansion in educational tourism.

Average attendance remained relatively stable across the three survey periods, fluctuating between 64,000 and 72,000 visitors per cave annually. The FY 2023 peak may reflect post-pandemic tourism recovery and increased domestic travel patterns observed globally during that period. The FY 2025 average of 64,000 visitors confirms that cave tourism remains a significant attraction category with sustained visitor demand.

Average revenue per cave reached approximately \$1.5 million in FY 2025. Although slightly below FY 2023 levels, revenue remains above inflation-adjusted FY 2021 figures, suggesting continued economic resilience within the sector. This performance demonstrates the strong economic contribution of cave tourism.

Average employment declined from 33 employees per cave in FY 2021 to 26 employees in FY 2025. Possible explanations include operational efficiencies, automation and digital ticketing, staffing shortages (as suggested by data provided in the 'Issues' section, or restructuring following the pandemic period. Despite this decline, cave tourism continues to generate substantial direct employment, particularly in rural and peripheral regions.

School visitation increased significantly across the study period: FY 2021: 3.1K average school visitors; FY 2023: 6.5K and FY 2025: 7.6K. This represents one of the strongest growth indicators in the survey. The findings highlight the increasing educational role of caves in geology education, environmental awareness, heritage interpretation, and science outreach.

The sector continues to play an important role in tourism economies, employment generation, natural heritage conservation, and environmental education.

Overall, the data suggest that cave tourism is evolving toward a more professionalized, institutionally supported, and education-oriented tourism model.