

Post COVID Recovery of the Largest Natural Tourism Attractions in the World

Remains Mixed with Reduced Visitation Persisting

A global survey of show caves, natural tourism attractions with a multi-billion-dollar impact on their communities, illustrates that work is still needed to fuel recovery for the industry.

December 14, 2022 Frasassi/Genga-Italy & Cobleskill, NY – Results of a recent survey of operators of the largest natural tourism attractions in the world, show caves, indicates that recovery from the pandemic remains challenging. In 2021 there were 120.8 million visitors to show caves, an overall 16% decline from a pre-pandemic high in 2019 of 144 million. However, show caves in the United States (U.S.) were up 27%, from 13.8 million in 2019 to 17.5 million in 2021. The assumption is the accelerated opening of tourism in the U.S. along with pent up demand and an emphasis on outdoor recreation may have been the reason for the difference.

Worldwide staffing remains a challenge for show cave operators who rely on tour guides and hospitality professionals. Worldwide employment at show caves is down by 17% from 2019 levels, tracking with hiring challenges that continue to be endemic within the tourism industry as a whole. However, another surprising finding was that direct spending at show caves was up 7% globally (corrected for inflation), indicating the visitors who did come were willing to spend more on the experience overall.

Yet, according to Dr. Jim Petrick, Professor at Texas A&M, “Direct spending at a local attraction is just one aspect of the impact caves have on local economies. Typically, spending doesn’t stop at the attraction as visitors often stop at other businesses in the area including restaurants, hotels, shops, and more. Since tourism spending is also new money to a community, it also has multiplier effects (beyond direct spending) as dollars spent at a cave can often trickle down to the rest of a community. Thus, the economic impact of the cave industry is likely considerably higher than just direct spending.”

The International Show Caves Association (ISCA) and the National Caves Association (NCA) in the U.S. joined together to survey more than 1500 show caves around the world. Respondents represented 10% of the world’s and one third of the U.S. show caves, minus Southwest Asia caves. Operators in Southwest Asia have not responded to surveys, although efforts continue to keep lines of communication open. This year’s survey follows a 2020 effort to establish a baseline of the industry and its impact, and to show the

impact of the global pandemic on these hubs for tourism. The 2022 survey follows up on the industry, tracking recovery, growth, and, unfortunately, closures around the world of these unique natural wonders.

“Ongoing capacity restrictions were causing real challenges for show caves around the world,” said Friedrich Oedl, president of ISCA. “Some caves are still closed, others have ongoing mandates that are keeping them from operating fully. This makes it hard for them to return to pre-pandemic levels of visitation.”

“Show caves are more than unique natural wonders,” said Joe Klimczak, president of NCA. “They have long served an important economic role as engines for local tourism as well. While it’s clear some level of recovery has begun, we still have some ways to go.”

The findings included:

Visitation

In 2021, 120.8 million people visited show caves worldwide, and 17.5 million in the U.S. This is down from the peak of 2019 of 144 million worldwide, but up from 2019’s numbers of 13.8 million in the U.S. The U.S.’s 27% increase in visitors in 2021 is believed to be due to an emphasis on outdoor travel and faster rate of reopening in 2020 and 2021. Still, given that in 2020 94% of show caves worldwide closed due to COVID, the recovery so far is a hopeful indicator of continued possibilities for a full recovery.

Direct Economic Impact

Show caves generated direct visitor spending of \$2.14 billion worldwide with \$382.1 million in the U.S., an increase of 7% and 3% respectively when corrected for inflation. This spending reflects only revenue for the show caves, the impact in the communities surrounding these destinations is also significant. Restaurants, hotels, and many other local businesses as well as local government entities all benefit from the visitor spending in the communities around show caves. Up from 2019’s spending of \$1.93 billion and \$354 million in the U.S., the change is remarkable, particularly in light of the loss in the first half of 2020 closures that resulted in a loss of 61% of revenue and the drop in visitors in 2021 for caves outside the U.S. It is on track with a reported trend of visitors to attractions spending more while traveling in 2021, a trend that is helping fuel a rebound for the industry.

Jobs

During the closures in 2020, 40,000 people lost their jobs at show caves worldwide, over 3,400 in the U.S. The lower number in the U.S. was largely due to the Paycheck Protection Program established in the U.S. Worldwide show caves in 2019 employed 69,000. The good news is nearly 57,000 of those jobs have returned (including 7,600 in the U.S.), however hiring remains challenging with two-thirds of respondents indicating they have more jobs than applicants.

Survey respondents represented a sampling of show caves in 195 countries across six continents, including Europe, Asia, Oceania, North and South America, and Africa. Participants included a wide range of government owned and privately held show caves with visitation levels ranging from zero (caves which are still unable to open due to local restrictions) to over 500,000.

Complete [survey results are available here](#).

[Photos available here](#).

About the [International Show Caves Association](#)

The International Show Caves Association (ISCA) was founded in 1990 and is headquartered in Frasassi/Genga, Italy. ISCA is an international organization of persons, associations, corporations, and government agencies who own, manage or operate show caves that are open to the public.

About the [National Caves Association USA](#)

Founded in 1965 by a small group of private show cave owners from across the United States, the National Caves Association USA (NCA) has been encouraging the public to discover the underground wonders of America's show caves. The Association has grown over the years to include the best show caves across the United States, Bermuda, and Barbados.

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