

International Show Cave Business Survey Worldwide Results 2022



INTERNATIONAL SHOW CAVES ASSOCIATION



Survey Purpose

#1 - Establish a baseline for the significance of the show cave industry worldwide and tell the world how show caves contribute to the global economy.

#2 – Continue to monitor the recovery of show caves from the COVID-19 pandemic.

#3 – Identify show cave manager's immediate concerns and plans for the future.

These results were compiled by Core Research and include results from 127 respondents representing 152 caves across the world. This show cave business survey was conducted by the International Show Caves Association and the National Caves Association between September & October 2022. The income and visitation questions were directed at 2021 show cave numbers.

Thank You for Participating!

2022 Survey Respondents

127 Responses

152 Show Caves

24 Countries

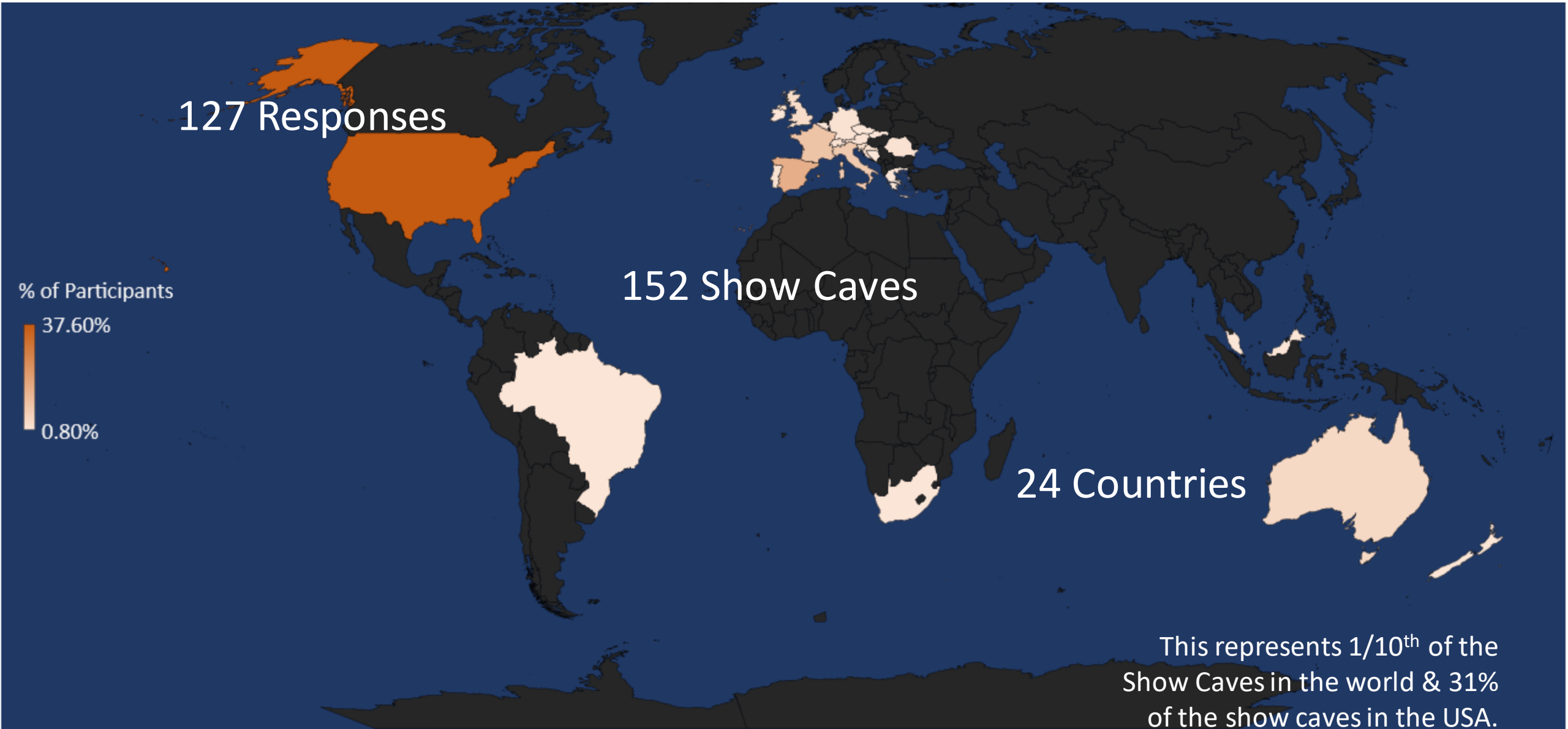
This represents 1/10th of the Show Caves in the world & 31% of the show caves in the USA.

In 2020, we received responses from 101 Show Caves in 20 countries.

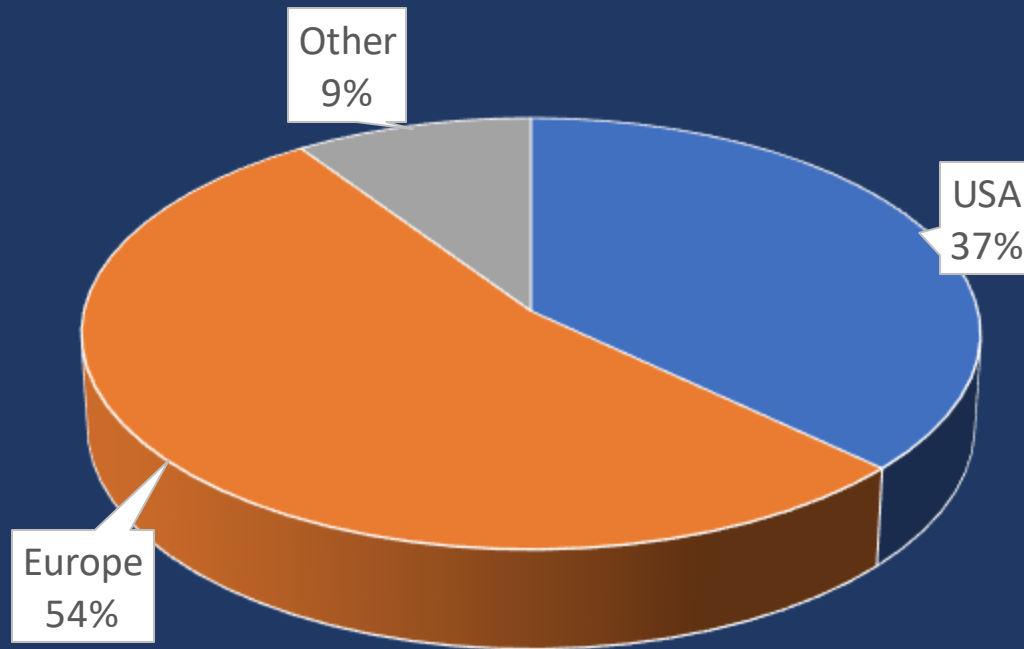
% of Participants

37.60%

0.80%



2022 Survey Respondents



Responding Caves

- USA
- Spain
- Czech Republic
- Slovakia
- France
- Italy
- Australia
- UK
- Slovenia
- Croatia
- Austria
- Germany
- Portugal
- Romania
- Switzerland
- Barbados
- Belgium
- Bosnia
- Brazil
- Greece
- Ireland
- Malaysia
- New Zealand
- South Africa

Show Cave Revenue

2019

2021

Revenue (worldwide)

\$1.93 billion

\$2.14 billion



11%

USA Revenue

\$354 million

\$368.8 million



4%

Show Cave Visitation

2019

2021

Visitation (worldwide)

144 million visits

120.8 million visits



16%

USA Visitation

13.8 million visits

17.5 million visits



27%

Show Cave Employees / Peak Season

2019

2021

Employees (worldwide)

69,000

56,954

 17%

USA Employees

9,500

7,629

 20%

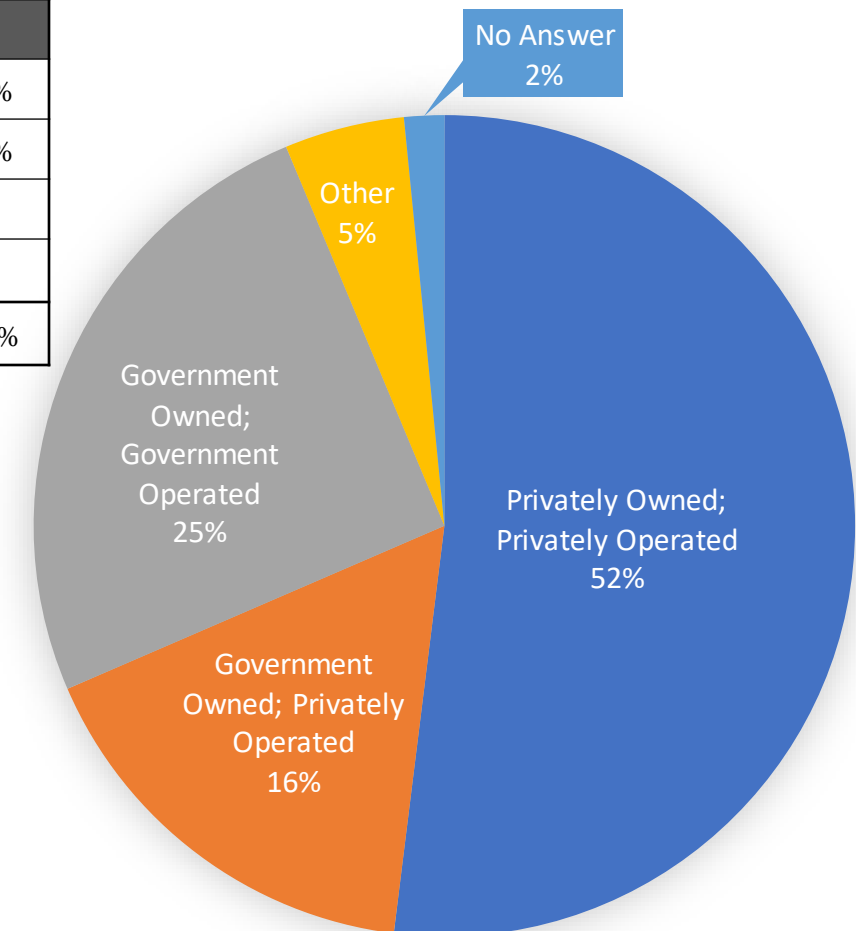


Ownership/Operation Type by Region, Visitation & Income - 2021

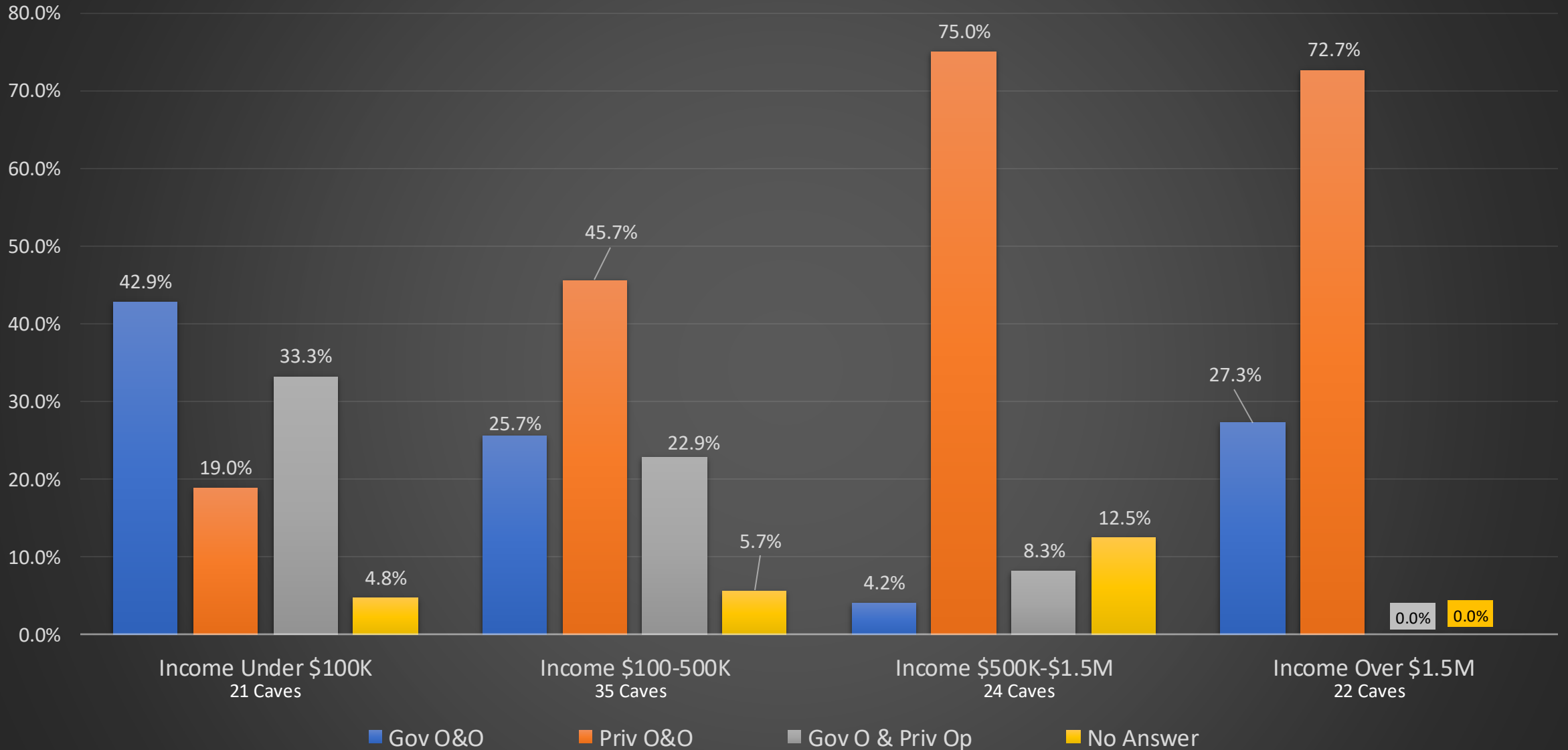
	Overall	USA	Europe	Visitors			Income			
				Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M
# of caves	127	47	68	44	52	18	21	35	24	22
Ownership										
Gov O&O	25.2%	10.6%	35.3%	31.8%	15.4%	33.3%	42.9%	25.7%	4.2%	27.3%
Private O&O	52.0%	85.1%	32.4%	34.1%	67.3%	61.1%	19.0%	45.7%	75.0%	72.7%
Gov O, Priv Op	16.5%	4.3%	22.1%	29.5%	9.6%		33.3%	22.9%	8.3%	
No Answer	6.3%		10.3%	4.5%	7.7%	5.6%	4.8%	5.7%	12.5%	
Totals	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Other ownership arrangement:

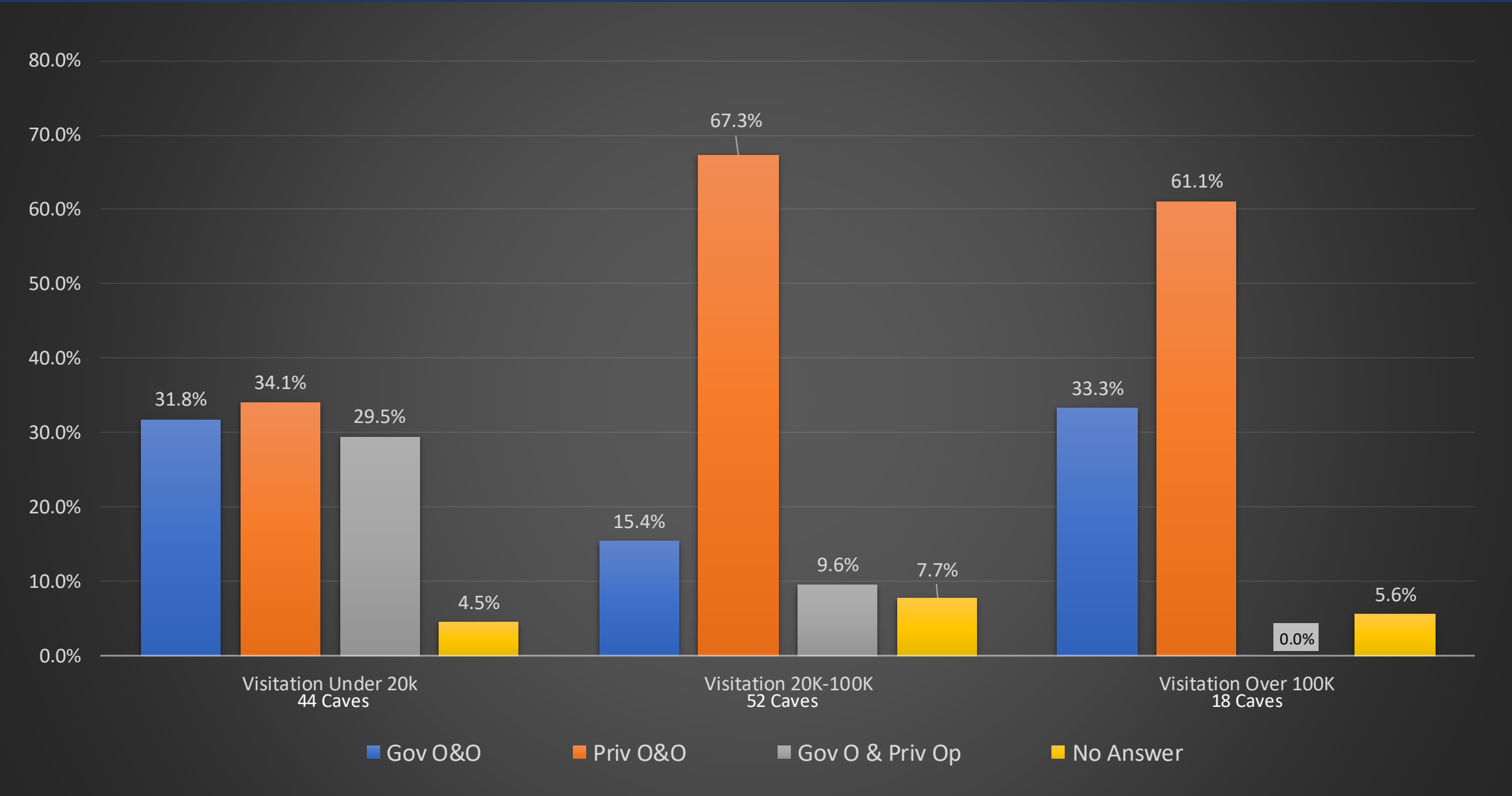
- Charity committee owned and operated
- Communal management
- Municipality owned and operated
- Owned by municipality and operated by a community of municipalities
- Privately owned and departmental operated
- Vested to not for profit



Ownership/Operation Type by Income



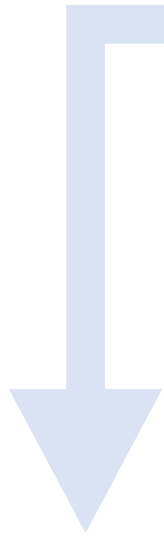
Ownership/Operation Type by Visitation



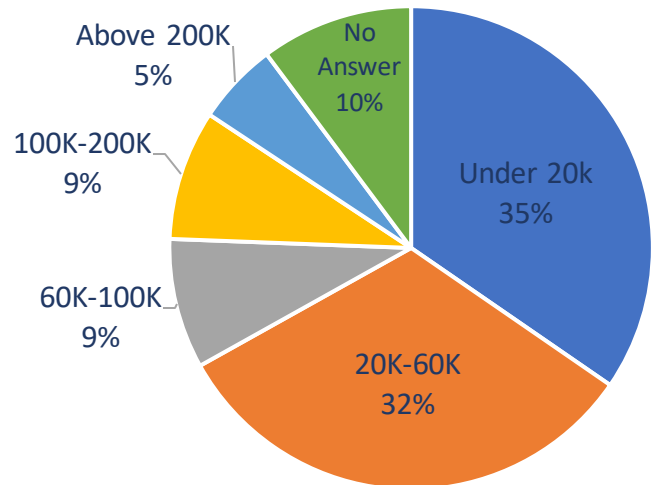
Visitation

by Region, Income & Operation Types - 2021

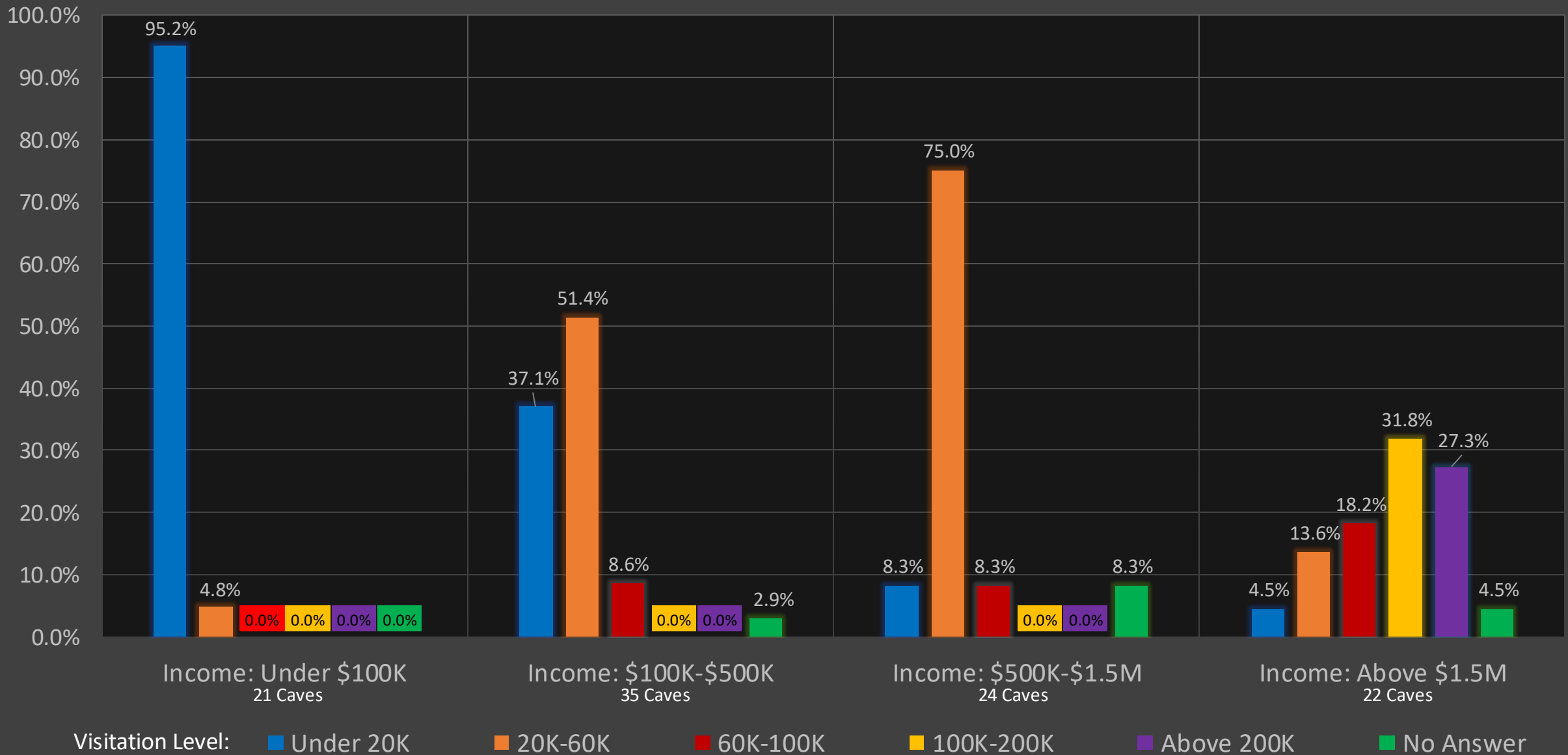
	Overall	USA	Europe	Visitors			Income				Ownership		
				Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
Visitation													
Under 20K	34.6%	14.9%	47.1%	100.0%			95.2%	37.1%	8.3%	4.5%	43.8%	22.7%	61.9%
20K-60K	32.3%	44.7%	26.5%		78.8%		4.8%	51.4%	75.0%	13.6%	25.0%	42.4%	9.5%
60K-100K	8.7%	12.8%	5.9%		21.2%			8.6%	8.3%	18.2%		10.6%	14.3%
100K-200K	8.7%	12.8%	4.4%			61.1%				31.8%	12.5%	9.1%	
Above 200K	5.5%	10.6%	2.9%			38.9%				27.3%	6.3%	7.6%	
No Answer	10.2%	4.3%	13.2%					2.9%	8.3%	4.5%	12.5%	7.6%	14.3%
Totals	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



Visitation - Overall



Visitation by Income



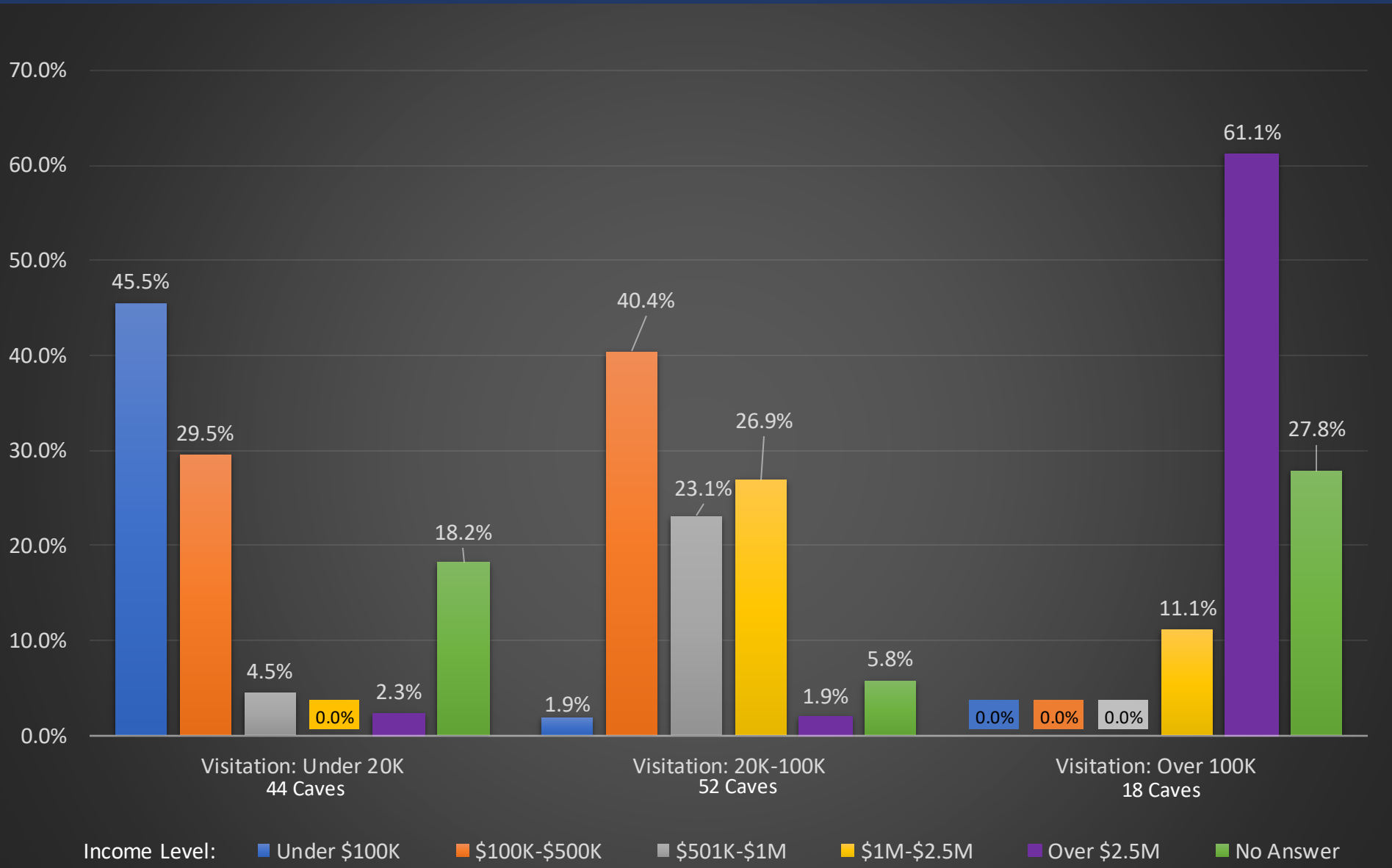
Income

by Region, Visitors & Operation Types - 2021

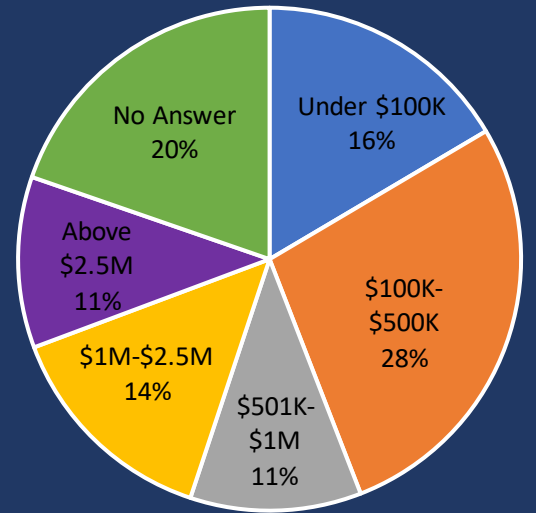
# of caves	Overall	USA	Europe	Visitors			Income				Ownership		
				Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
Income													
under \$100K	16.5%	2.1%	23.5%	45.5%	1.9%		100.0%				28.1%	6.1%	33.3%
\$100-\$500K	27.6%	25.5%	32.4%	29.5%	40.4%			100.0%			28.1%	24.2%	38.1%
\$501K - \$1M	11.0%	17.0%	7.4%	4.5%	23.1%				58.3%			15.2%	9.5%
\$1M - \$1.5M	7.9%	10.6%	5.9%		15.4%				41.7%		3.1%	12.1%	
\$1.5M - \$2M	5.5%	10.6%	2.9%		9.6%	11.1%				31.8%	6.3%	7.6%	
\$2M - \$2.5M	0.8%	2.1%			1.9%					4.5%		1.5%	
Above \$2.5M	11.0%	14.9%	7.4%	2.3%	1.9%	61.1%				63.6%	12.5%	15.2%	
No Answer	19.7%	17.0%	20.6%	18.2%	5.8%	27.8%					21.9%	18.2%	19.0%
Totals	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

# of caves	Overall	USA	Europe	Visitors			Income				Ownership		
				Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
Income Average	\$ 1,354,186	\$ 2,304,257	\$ 744,641	\$ 216,620	\$ 815,410	\$ 6,509,876	\$ 31,698	\$ 301,220	\$ 936,180	\$ 4,747,741	\$ 836,410	\$ 2,043,815	\$ 194,625

Income by Visitation

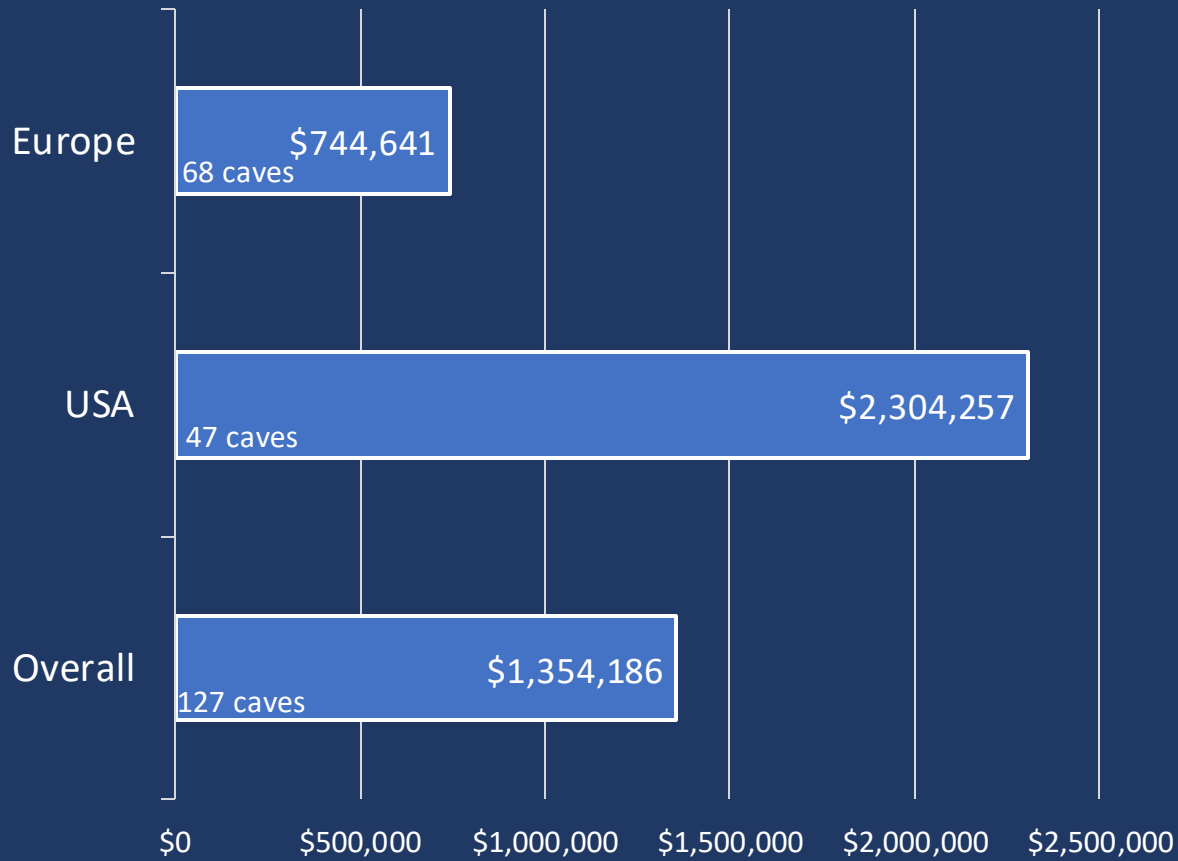


Income - Overall

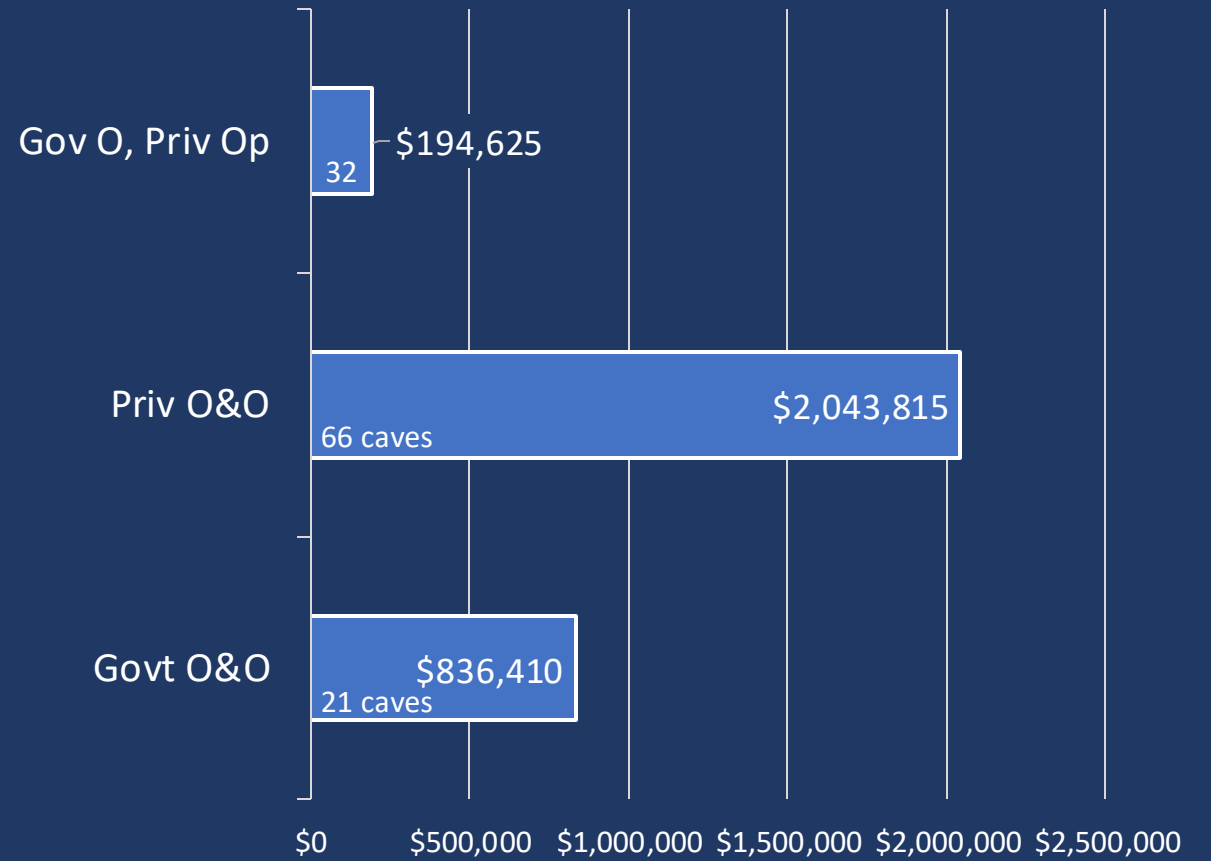


Income Averages

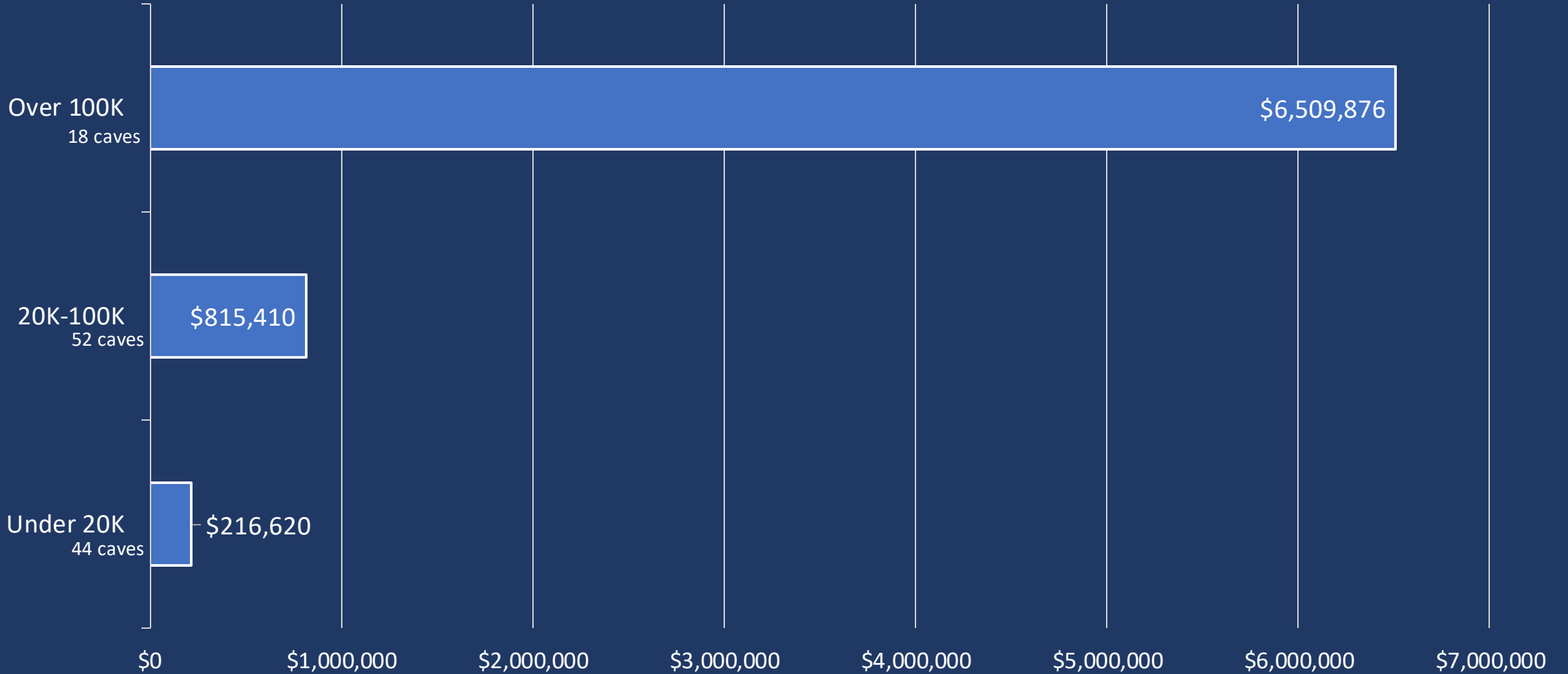
By Region



By Ownership/Operation Type



Income Average by Visitation

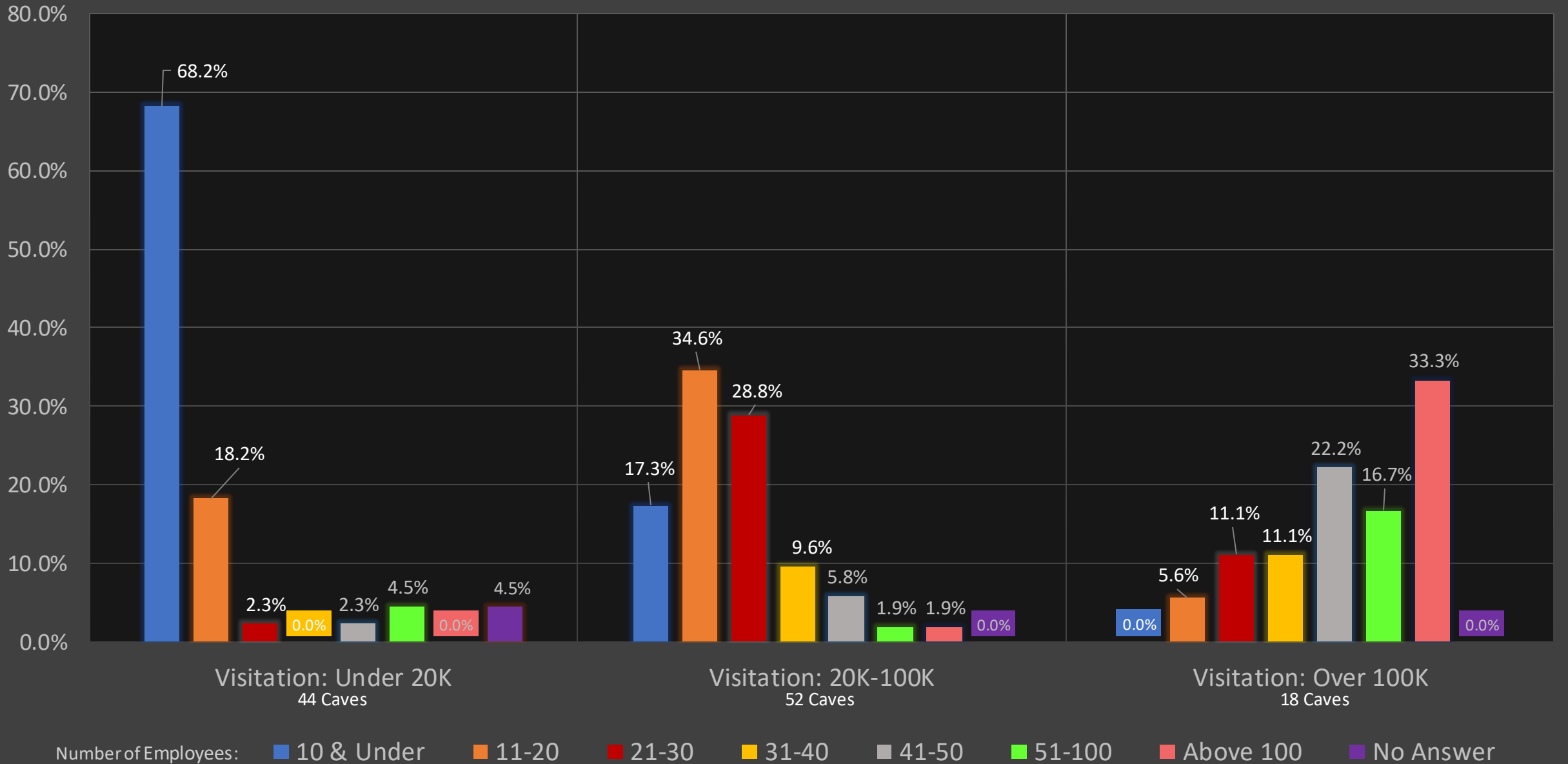


Number of Employees by Region, Visitation, Income & Operation Types

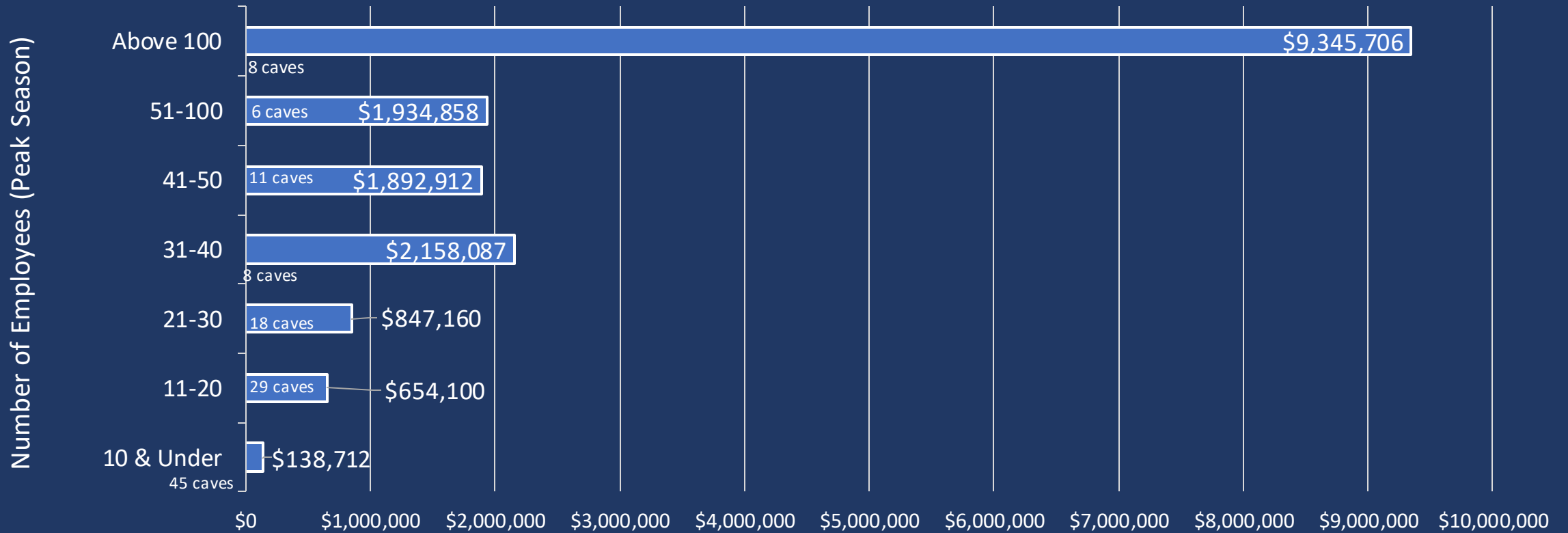
Question: How many employees do you staff at your show cave during the *peak* of your season?													
# of caves	Overall	USA	Europe	Visitors			Income				Ownership		
				Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
127	47	68	44	52	18	21	35	24	22	32	66	21	
Number of Employees													
10 and under	35.4%	14.9%	51.5%	68.2%	17.3%		76.2%	40.0%	8.3%	0.0%	53.1%	18.2%	66.7%
11-20	22.8%	36.2%	14.7%	18.2%	34.6%	5.6%	4.8%	40.0%	41.7%	9.1%	18.8%	28.8%	9.5%
21-30	14.2%	12.8%	14.7%	2.3%	28.8%	11.1%	9.5%	14.3%	33.3%	9.1%	6.3%	21.2%	4.8%
31-40	6.3%	10.6%	4.4%		9.6%	11.1%		2.9%	4.2%	22.7%	3.1%	6.1%	4.8%
41-50	8.7%	10.6%	5.9%	2.3%	5.8%	22.2%			4.2%	18.2%	9.4%	10.6%	
51-100	4.7%	4.3%	1.5%	4.5%	1.9%	16.7%	4.8%		8.3%	13.6%		6.1%	9.5%
Above 100	6.3%	10.6%	4.4%		1.9%	33.3%		2.9%		27.3%	9.4%	7.6%	
No Answer	1.6%		2.9%	4.5%			4.8%					1.5%	4.8%
Totals	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

# of caves	Overall	USA	Europe	Visitors			Income				Ownership		
				Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
127	47	68	44	52	18	21	35	24	22	32	66	21	
Average # of Employees	33	41	27	12	24	92	12	17	25	99	38	38	16

Number of Employees by Visitation



Income Average by Number of Employees



# of caves	Number of Employees (Peak Season)						
	10 and under	11-20	21-30	31-40	41-50	51-100	Above 100
	45	29	18	8	11	6	8
Income Average	\$ 138,712	\$ 654,100	\$ 847,160	\$ 2,158,087	\$ 1,892,912	\$ 1,934,858	\$ 9,345,706

School Children Visitation

by Region, Visitors, Income & Operation Types

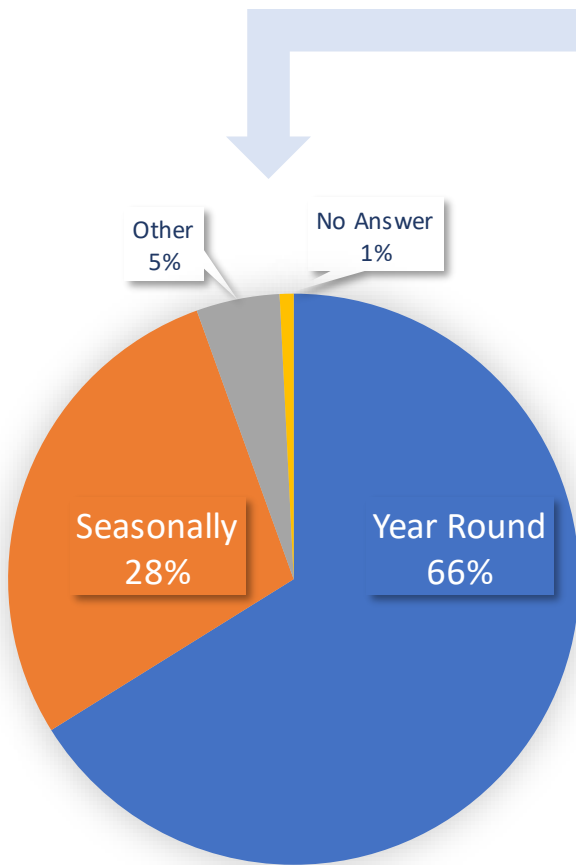
				Visitors			Income				Ownership		
	Overall	USA	Europe	Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
School Children													
under 500	41.0%	37.1%	44.6%	62.2%	28.6%	20.0%	68.8%	50.0%	23.5%	20.0%	56.5%	33.3%	52.9%
500-1,000	13.0%	11.4%	10.7%	16.2%	11.9%	13.3%	6.3%	12.5%	23.5%	10.0%		18.5%	11.8%
1,000-2,000	11.0%	8.6%	14.3%	13.5%	14.3%		18.8%	12.5%	11.8%	5.0%		11.1%	11.8%
2,000-3,000	5.0%	5.7%	1.8%		9.5%			3.1%	11.8%	5.0%	8.7%	3.7%	5.9%
3,000-4,000	6.0%	8.6%	5.4%		7.1%	13.3%		3.1%	17.6%	10.0%	4.3%	9.3%	
4,000-5,000	6.0%	2.9%	7.1%	5.4%	4.8%	6.7%	6.3%	3.1%			4.3%	9.3%	
5,000-6,000	4.0%	11.4%			7.1%	6.7%		3.1%		10.0%	4.3%	3.7%	5.9%
Above 6,000	14.0%	14.3%	16.1%	2.7%	16.7%	40.0%		12.5%	11.8%	40.0%	21.7%	11.1%	11.8%
Totals	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

				Visitors			Income				Ownership		
	Overall	USA	Europe	Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
School Children Average	3,148	3,362	3,287	883	3,087	9,353	662	2,006	2,701	8,067	4,807	2,987	1,783

2021 School Group visitation was significantly below normal coming out of the pandemic.

Operating Schedule

by Region, Visitors & Income



	Overall	USA	Europe	Visitors			Income				Ownership		
				Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O	O&OPriv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
Open													
Year-round	65.4%	55.3%	66.2%	59.1%	59.6%	88.9%	71.4%	48.6%	66.7%	81.8%	65.6%	62.1%	76.2%
Seasonal	28.3%	42.6%	23.5%	31.8%	36.5%	11.1%	28.6%	37.1%	33.3%	13.6%	21.9%	36.4%	14.3%
Other	5.5%	2.1%	8.8%	6.8%	3.8%			11.4%		4.5%	9.4%	1.5%	9.5%
No Answer	0.8%		1.5%	2.3%				2.9%			3.1%		
Totals	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Other operating schedule:

- Open 11 months per year
- They are closed January and February. March, April, May, October, November and December open from Friday to Sunday. July and September from Wednesday to Sunday and August every day. If there are holidays and bridges, they are also open.
- 7 days a week most months. December and February just weekends. Closed January.

Activities & Amenities Offered at Show Caves



92%



78%



54%

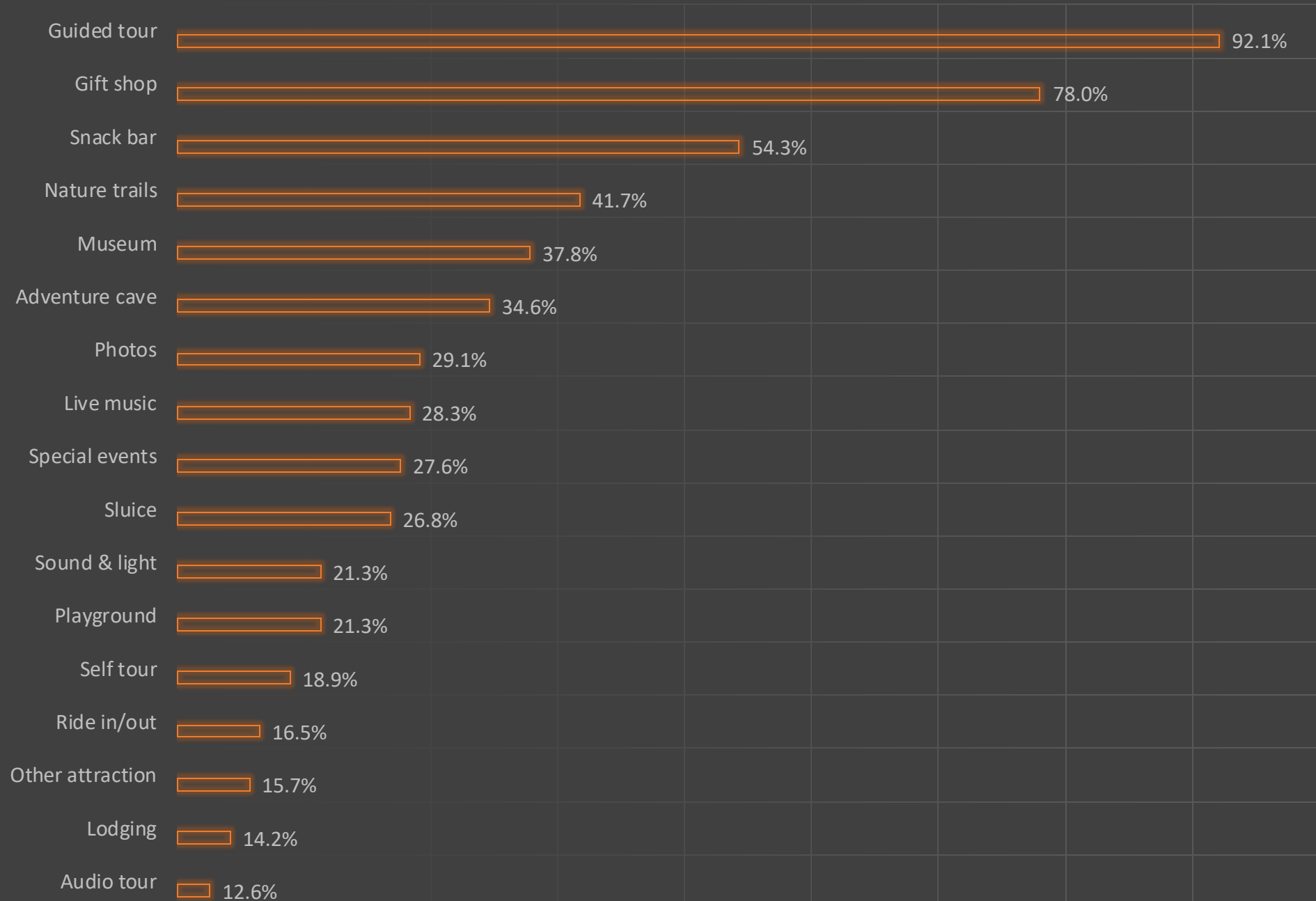


41%



38%

Top Activities & Amenities Offered by Show Caves



Activities & Amenities

By Region, Visitation, Income & Ownership

	Overall	USA	Europe	Visitors			Income				Ownership		
				Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
Guided Tour	92.1%	87.2%	94.1%	90.9%	90.4%	94.4%	90.5%	91.4%	91.7%	90.9%	96.9%	86.4%	100.0%
Gift Shop	78.0%	89.4%	66.2%	61.4%	90.4%	88.9%	61.9%	82.9%	91.7%	86.4%	68.8%	87.9%	61.9%
Snack bar, Café or Restaurant	54.3%	46.8%	55.9%	40.9%	53.8%	83.3%	38.1%	54.3%	50.0%	77.3%	43.8%	60.6%	52.4%
Nature trails	41.7%	55.3%	27.9%	34.1%	50.0%	44.4%	38.1%	34.3%	50.0%	50.0%	40.6%	40.9%	47.6%
Museum	37.8%	34.0%	42.6%	40.9%	40.4%	33.3%	47.6%	57.1%	20.8%	22.7%	43.8%	33.3%	38.1%
Adventure Caving Tours	34.6%	40.4%	27.9%	36.4%	28.8%	44.4%	38.1%	31.4%	37.5%	31.8%	34.4%	33.3%	42.9%
Souvenir Photos	29.1%	38.3%	20.6%	18.2%	26.9%	72.2%	14.3%	22.9%	29.2%	68.2%	28.1%	33.3%	23.8%
Live Music or Concerts	28.3%	17.0%	33.8%	20.5%	25.0%	50.0%	19.0%	17.1%	37.5%	40.9%	31.3%	25.8%	38.1%
Special Event Space	27.6%	34.0%	23.5%	18.2%	36.5%	38.9%	23.8%	28.6%	29.2%	36.4%	21.9%	31.8%	28.6%
Sluice	26.8%	70.2%	0.0%	11.4%	36.5%	50.0%	0.0%	20.0%	45.8%	50.0%	0.0%	50.0%	4.8%
Sound & Light Show	21.3%	6.4%	30.9%	18.2%	17.3%	33.3%	9.5%	14.3%	33.3%	31.8%	15.6%	19.7%	28.6%
Playground	21.3%	27.7%	16.2%	18.2%	25.0%	27.8%	19.0%	20.0%	29.2%	40.9%	28.1%	22.7%	9.5%

Activities & Amenities

By Region, Visitation, Income & Ownership

				Visitors			Income				Ownership		
	Overall	USA	Europe	Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
Self-Guided Tour	18.9%	21.3%	10.3%	13.6%	21.2%	33.3%	9.5%	14.3%	16.7%	36.4%	15.6%	19.7%	23.8%
Ride in or out of the cave	16.5%	14.9%	17.6%	13.6%	11.5%	33.3%	9.5%	14.3%	16.7%	27.3%	21.9%	12.1%	19.0%
<i>***Types of Rides: boat, elevator, wagons, bus, trams, funicular, train, vehicle & kayak adventure tour</i>													
Other attraction	15.7%	19.1%	13.2%	11.4%	25.0%	5.6%	14.3%	11.4%	33.3%	18.2%	6.3%	21.2%	14.3%
<i>***Other attractions: animations, exhibitions, miniature golf, wine tasting, dinner cruise, snowshoe trails, escape room, pre historic workshops, mystery house, themed tours/visits</i>													
Lodging	14.2%	21.3%	4.4%	9.1%	15.4%	27.8%	14.3%	11.4%	16.7%	22.7%	15.6%	16.7%	4.8%
<i>***Types of Lodging: cabins, campsites, glamping, motel, guesthouse, lodge, dorm, eco-tents, rv sites, hotel, yurt, camping in cave (part of adventure tour), chalets, bungalow</i>													
Audio Guided Tour	12.6%	4.3%	17.6%	13.6%	9.6%	22.2%	14.3%	5.7%	8.3%	18.2%	15.6%	9.1%	9.5%
Zip Line / Rails	8.7%	8.5%	4.4%	4.5%	9.6%	22.2%	4.8%	5.7%	12.5%	22.7%	3.1%	12.1%	4.8%
Ropes Course	6.3%	6.4%	2.9%	2.3%	5.8%	22.2%	9.5%	5.7%	0.0%	18.2%	0.0%	7.6%	9.5%
Amusement Rides	3.9%	8.5%	0.0%	2.3%	1.9%	16.7%	4.8%	0.0%	0.0%	13.6%	0.0%	6.1%	4.8%
VR Tour	3.1%	2.1%	4.4%	2.3%	1.9%	11.1%	0.0%	2.9%	0.0%	9.1%	6.3%	1.5%	4.8%
Maze	3.1%	8.5%	0.0%	0.0%	3.8%	11.1%	0.0%	2.9%	0.0%	13.6%	0.0%	6.1%	0.0%

Survey Verbatim Comments

Type of Ride:

- Boat
- Elevator
- Elevator / Wagons
- Boat in one cave
- Boat inside the cave
- Boat ride & bus ride from gift store to cavern entrance (30 min travel one way)
- Elevator to the caves and trams in the cave
- Elevator, boat ride within the cave
- Elevators to ride out of the cave
- Funicular
- Only by boat
- Tours are by boat, we also offer kayak adventure tour
- Train
- Train (narrow gauge rail)
- Tram
- Vehicle

Survey Verbatim Comments

Other Offerings:

- Abseil
- Animations for children and exhibitions for all
- Introductory workshop to archaeological excavation
- Break Your Own Geode, Miniature Golf, Family Games Park
- Cable car for access to the cave
- Crystal Mine for 5 & Under-Free
- Domestic Animals
- Escape rooms, Sabertooth Kid's crawl attraction
- Kayak Caving
- Lake Shasta Dinner Cruises
- Minigolf
- Mystery house
- PREHISTORIC WORKSHOPS
- Seasonal themed events
- Self guided (outside only) Tree Tour around our property
- Snowshoe Trails
- Specific family events: treasure quest, Halloween game...
- Thematic visits and dramatized visits
- themed guided tours, e. g. bat story for children, hunt for a treasure
- wine tasting

Survey Verbatim Comments

Type of Lodging:

- Bungalow type cabins
- Cabins, campgrounds, RV boondocking
- Cabins, caravan park/campgrounds, lodge (dorm-style), eco tents
- Campground (powered and unpowered sites), dormitory style accommodation for school groups
- Camping inside the cave as part of an overnight adventure package
- Chalets, bungalows, dorm
- Glamping
- Guesthouse accommodation including individual en-suite rooms and family accommodation
- Hotel, bungalows, yourts, RV park, campgrounds
- Motel
- Motel – 67 rooms, Air BnB
- Motel, campground, RV hookups
- Motel Room, Cabins, Campground
- Rustic Cabins
- RV Camping and Primitive Camping
- RV Camping and Tent Camping
- RV sites and cabins
- We have a campground and a hotel (closing 1 ½ years for renovation)

Most Common Challenges

Staff - 59%

USA
81%

Europe
44%

Improving Experience – 55%

USA
55%

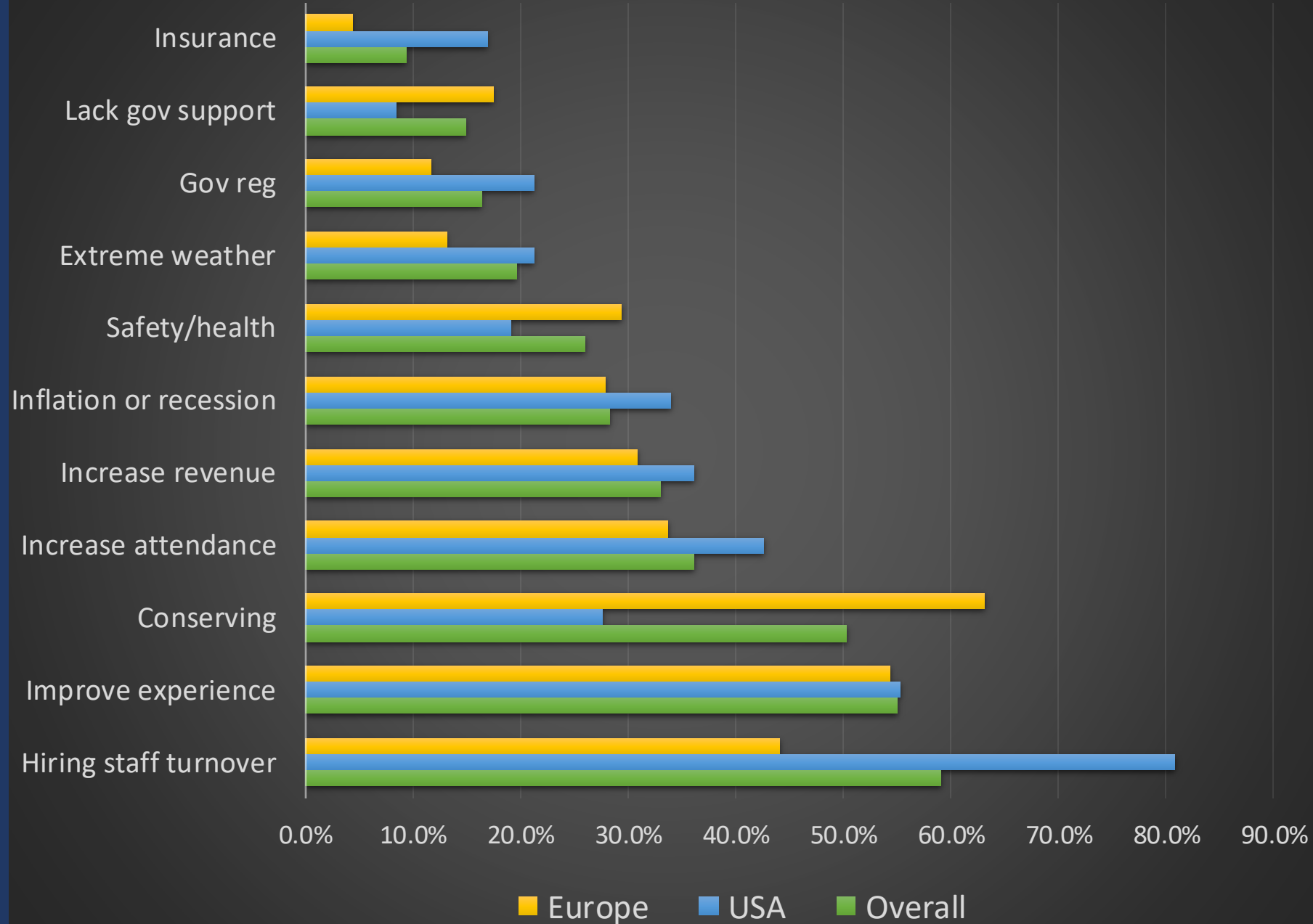
Europe
54%

Conserving – 50%

USA
27%

Europe
63%

Challenging Issues Right Now



Show Cave Challenges

Question: What issues are challenging you the most at your show cave now?

				Visitors			Income				Ownership		
	Overall	USA	Europe	Under 20K	20K-100K	Over 100K	Under \$100K	\$100-\$500K	\$500K-\$1.5M	Above \$1.5M	Gov O&O	Priv O&O	Gov O, Priv Op
# of caves	127	47	68	44	52	18	21	35	24	22	32	66	21
Hiring staff turnover	59.1%	80.9%	44.1%	50.0%	61.5%	72.2%	47.6%	68.6%	54.2%	68.2%	53.1%	71.2%	23.8%
Improve experience	55.1%	55.3%	54.4%	56.8%	48.1%	66.7%	57.1%	54.3%	50.0%	59.1%	56.3%	50.0%	66.7%
Conserving	50.4%	27.7%	63.2%	54.5%	50.0%	44.4%	66.7%	51.4%	45.8%	45.5%	65.6%	39.4%	52.4%
Increase attendance	36.2%	42.6%	33.8%	38.6%	30.8%	50.0%	47.6%	34.3%	37.5%	54.5%	31.3%	39.4%	42.9%
Increase revenue	33.1%	36.2%	30.9%	31.8%	32.7%	38.9%	33.3%	34.3%	33.3%	50.0%	28.1%	37.9%	33.3%
Inflation or recession	28.3%	34.0%	27.9%	25.0%	26.9%	44.4%	14.3%	34.3%	20.8%	54.5%	25.0%	34.8%	19.0%
Safety/health	26.0%	19.1%	29.4%	29.5%	23.1%	22.2%	28.6%	17.1%	33.3%	22.7%	34.4%	21.2%	23.8%
Extreme weather	19.7%	21.3%	13.2%	20.5%	19.2%	22.2%	19.0%	22.9%	20.8%	18.2%	15.6%	21.2%	23.8%
Gov reg	16.5%	21.3%	11.8%	18.2%	19.2%	16.7%	9.5%	25.7%	8.3%	22.7%	12.5%	18.2%	23.8%
Lack gov support	15.0%	8.5%	17.6%	18.2%	11.5%	5.6%	28.6%	17.1%	8.3%	9.1%	18.8%	7.6%	33.3%
Insurance	9.4%	17.0%	4.4%	4.5%	9.6%	22.2%	0.0%	8.6%	12.5%	22.7%	9.4%	13.6%	0.0%
Other challenge*	5.5%	4.3%	2.9%	6.8%	3.8%	5.6%	9.5%	5.7%	4.2%	0.0%	3.1%	4.5%	9.5%
War or unrest	1.6%	0.0%	1.5%	2.3%	1.9%	0.0%	4.8%	2.9%	0.0%	0.0%	3.1%	0.0%	4.8%

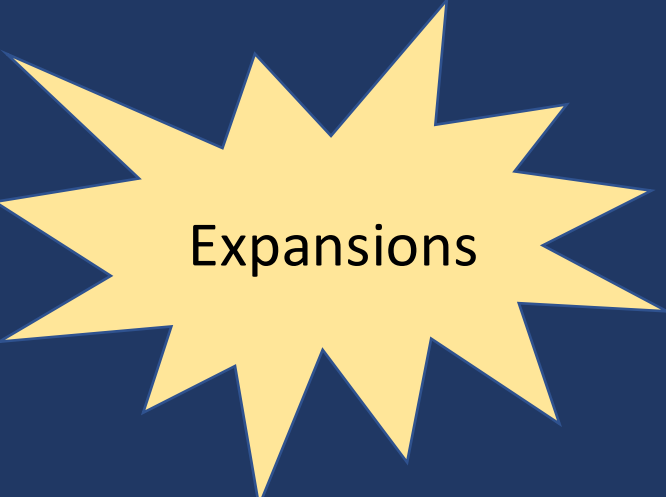
*Covid 19 shutdown and flow-on effects, Guests increasingly more difficult/refusing to follow rules or read/listen to warnings/expectations, international travel returning, maintenance, public management with sole interest of exploitation rather than in the conservation, protection and good management of the cave, road construction constantly

Survey Verbatim Comments

Other Challenges:

- Covid 19 shutdown and flow-on effects
- Guests increasingly more difficult/refusing to follow rules or read/listen to warnings/expectations
- International travel returning
- Maintenance
- Public Management. With the sole interest of exploitation, rather than in the conservation, protection and good management of the cave
- Road construction constantly


Plans for 2023




Expansions




Improving
Visitor
Experience




Upgrades &
Maintenance



Focus on
Staffing



Mo Money
Mo Money



New Events
Tour Changes
New Tours

Show Cave Plans for 2023 Verbatims

- ❖ Audioguides
- ❖ Expansions
- ❖ Adventure Tours
- ❖ Sales
- ❖ Tour Changes
- ❖ New Prices
- ❖ Trail Upgrades
- ❖ Building Updates
- ❖ Cave Upgrade
- ❖ Children's playground
- ❖ Expansions – Restaurant, Shop
- ❖ Focus on Staffing for 2023
- ❖ Increase Visitors
- ❖ Lighting maintenance
- ❖ Diversify Visitors
- ❖ Restoration of tourist routes
- ❖ Air BnB onsite
- ❖ Build a restaurant
- ❖ Remodel bathrooms, add black light tours

- ❖ Attract more visitors, additional themed tours
- ❖ Improving the quality of guidance, the staff stability, and maintaining the economic efficiency
- ❖ Accessibility for the disabled, improvement of infrastructure
- ❖ Add more special events, increase admission rates
- ❖ Adding a new outdoor attraction
- ❖ After several years of capital improvements and after a down year, we have no big plans for 2023
- ❖ Build a new sluice, decide on new attractions
- ❖ Building quality and environmental protection
- ❖ Opening all year
- ❖ Remodeling, further exploration, adding concession stand

- ❖ Building repairs, improvement and beautification
- ❖ Change of management, protection and expansion of the resource with sustainable, viable and innovative activities
- ❖ Construction of a new building for the reception of the visitors, the souvenir store and a refreshment bar
- ❖ Continue with the visits and extend them
- ❖ Creating a new speech with more anecdotes
- ❖ Creating more options for special events
- ❖ Develop some activities about cave formation & crystals for children
- ❖ Setting speleo museum, archeological researches...

Show Cave Plans for 2023 Verbatims

- ❖ Expand our RV parking
- ❖ Expansions & Renovations to facilities
- ❖ Increase staff for more individual tours
- ❖ Increase wild cave expeditions
- ❖ Introduction of a sweet shop
- ❖ Expansions & new tour changes
- ❖ Improving results from previous years
- ❖ Innovative events to increase shoulder month footfall
- ❖ Improved experiences and amenities for visitors
- ❖ Expand customer attractions, stabilize staff, process formalization
- ❖ Expand tours & expand adventure tours
- ❖ Open weekends January and first 2 weeks of February

- ❖ Development project for the centenary of our company (1925-2025): new visit and lighting, musical underground scene, new scientific explorations
- ❖ Doing our best to present tours that educate and entertain our guests. Making the visit enjoyable for the guests.
- ❖ Expansion in light touch multimedia underground installations
- ❖ Expansion of EV charging stations, strengthening our supply chain for merchandise
- ❖ Expansion. Currently construction infinity pools and upgrading the bar and grill.
- ❖ Maintain high quality and the conservation of the caves
- ❖ Opening new area for extended tour

- ❖ Expansions – we are planning on building developments, creating function spaces inside and outside the caves
- ❖ Finish the environmental center near the cave entrance. Create a cycle of water market. Improve the “scent” garden.
- ❖ Focus on developing opportunities for education groups
- ❖ General improvements to the quality and value of the experience. Through renovations in the museum and visitor centre and 1, alongside improvements to the cave electrics.
- ❖ Ongoing improvements, storm damage repair, address safety concerns, hire more guides
- ❖ Replace all the railings

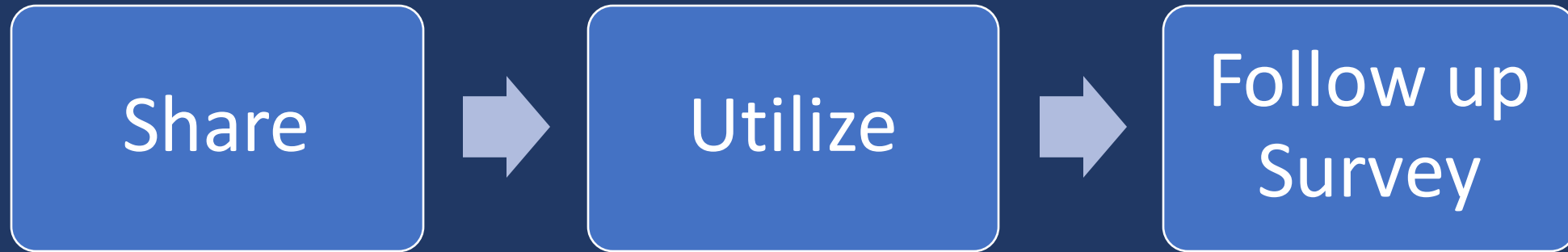
Show Cave Plans for 2023 Verbatims

- ❖ Marketing, Expansions
- ❖ Mo money mo money
- ❖ New Light, New Music
- ❖ Open a new part of the cave
- ❖ VR visit to the cave
- ❖ Upgrade POS / Online Reservations
- ❖ Updating & Maintenance
- ❖ Updates to facility
- ❖ Tour changes, review visitor experience, better promotions
- ❖ Tour changes, Getting local community (kids) involved in conservation, Improving and adjust educational tours for scholars age 7 -12
- ❖ Starting or re-starting products - a free fall activity, indoor climbing wall, escape rooms

- ❖ Maintaining and improving our buildings, working on our water system, increasing jeep tours, looking into other ways to increase revenue, special events
- ❖ More animations at reception area at arrival (circus, music), we want more parallel lighting insert of our halogen lights because of energy prices not because of light quality
- ❖ New Events, New building installations, new retail opportunities, new guest interaction experiences, a new show
- ❖ Workshops construction for team building or family events
- ❖ Expand food offerings with new café

- ❖ Modernize the scenography in the cave
- ❖ New tours, infrastructure updates
- ❖ Improve the experience and receive more visitors
- ❖ Planning to return to a pre-covid schedule
- ❖ Re-introduce tours that were put into hibernation during COVID
- ❖ Reaching +5million revenue (approx. 20% more)
- ❖ Tour changes, improve accessibility and sustainability
- ❖ Add a new cave entrance building
- ❖ Regain independence for Slovak Caves Administration, work more with guides and seasonal guides, think of booking tickets online and many more...

Next Steps



Thanks again to everyone who completed the survey!

Thanks to our survey developers and data analysts!

- Susan Korbel, CEO of Core Research
- Jamie K Finney, Natural Bridge Caverns



Questions??

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