



ERIH INDUSTRIAL HERITAGE BAROMETER 2022/23

SURVEY OF EUROPEAN INDUSTRIAL HERITAGE SITES



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- *4th European-wide Industrial Heritage Barometer after 2018, 2019 and 2020/21*
- *Internet online survey from 6 March to 20 April 2023*
- *questions targeting the years 2021 and 2022 (coronavirus pandemic)*
- *topic groups: core data, target groups, perspectives and measures*
- *over 450 operators of industrial heritage sites were contacted by email; in addition, there was a general call for participation on ERIH's website and Facebook page.*
- *84 sites/organisations from 11 European countries participated in the survey*

*Cooperation: - ERIH European Route of Industrial Heritage
- RVR Regionalverband Ruhr*



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When analysing the responses, the data for 2020 from the 'Industrial Heritage Barometer 2020/21' were also included in some questions for comparison purposes and presented in the graphs.

Together with the assessments of the current situation and the information on the measures and objectives planned for 2023, it is possible to read the impact of the measures adopted by the authorities to combat the coronavirus pandemic from 2020 onwards and the development after the pandemic has ended.



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SUMMARY OF THE RESULTS

Core data

Status

46% from the participating locations are in public ownership, 32% are run by private organisations, 12% by foundations, 4% are corporate museums and 6% have another status

Opening times (different due to coronavirus pandemic)

2021: 71% open all year, 18% seasonal, 11% closed

2022: 80% open all year, 17% seasonal, 3% closed



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Staff

The reduction of opening hours or the complete closure as well as the loss of income forced many locations to reduce staff, especially seasonal staff and guides. Despite the gradual return to 'normal operation' in 2022, staffing levels have not (yet) been readjusted.

Finances

Significantly reduced (or even lost) income from admission fees, but also from special events or rentals that could not be carried out, led to massive gaps in the economic plans. These were partly mitigated by special public or private financial support (usually decreasing annually). The overall situation led to economic problems at many sites, which in some cases continue and fundamentally threaten the existence of individual sites.



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Visitors

The annual visitor numbers at the single sites are varied and depend, for example, on location, size and attractiveness. Already in 2020, the Corona pandemic resulted in a significant slump (-40 % less than 2019). In 2021 they decreased again slightly (-2 %). With the expiry of the Coronavirus pandemic and its restrictions, visitor numbers in 2022 rose again encouragingly (+72%) and even exceeded those of 2019 by +2 %.

Due to their attractiveness, the industrial heritage sites in general have a trans-regional appeal: in former years 60% of the visitors came from the region, 30% from the respective country, 10% were international visitors. Due to the general and museum-specific restrictions because of the Coronavirus pandemic, the share of international visitors halved to 5 % in both reporting years.



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Target groups

- *The industrial heritage sites appeal to broad sections of the population (general public: 80 from 84 sites, families: 70).*
- *In addition, they pursue an important educational mission; for 45 sites, school groups are an important target group.*
- *The tourism target groups (Best Ager Over 50s: 59, Educational Travellers: 48, Young People: 68, and Mice Group: 37) are highly rated.*



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Perspectives

A clear turn towards the positive can be seen in the current situation assessment: in particular, the regional consumer climate, visitor development, the financial situation in general as well as the expected economic result are (in contrast to 2021) assessed by a majority between satisfactory and very good.



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Measures

Among the measures planned for 2023, improving energy efficiency, extending opening hours, reducing costs and recruiting staff are mentioned significantly more often than in 2021.

Whereas in 2021 the main objectives were almost exclusively related to overcoming the corona pandemic and its consequences, 'normal' objectives such as improving the quality of the site and the exhibition, the financial situation and the implementation of structural measures are now mentioned again.



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Evaluation of the answers to the individual questions

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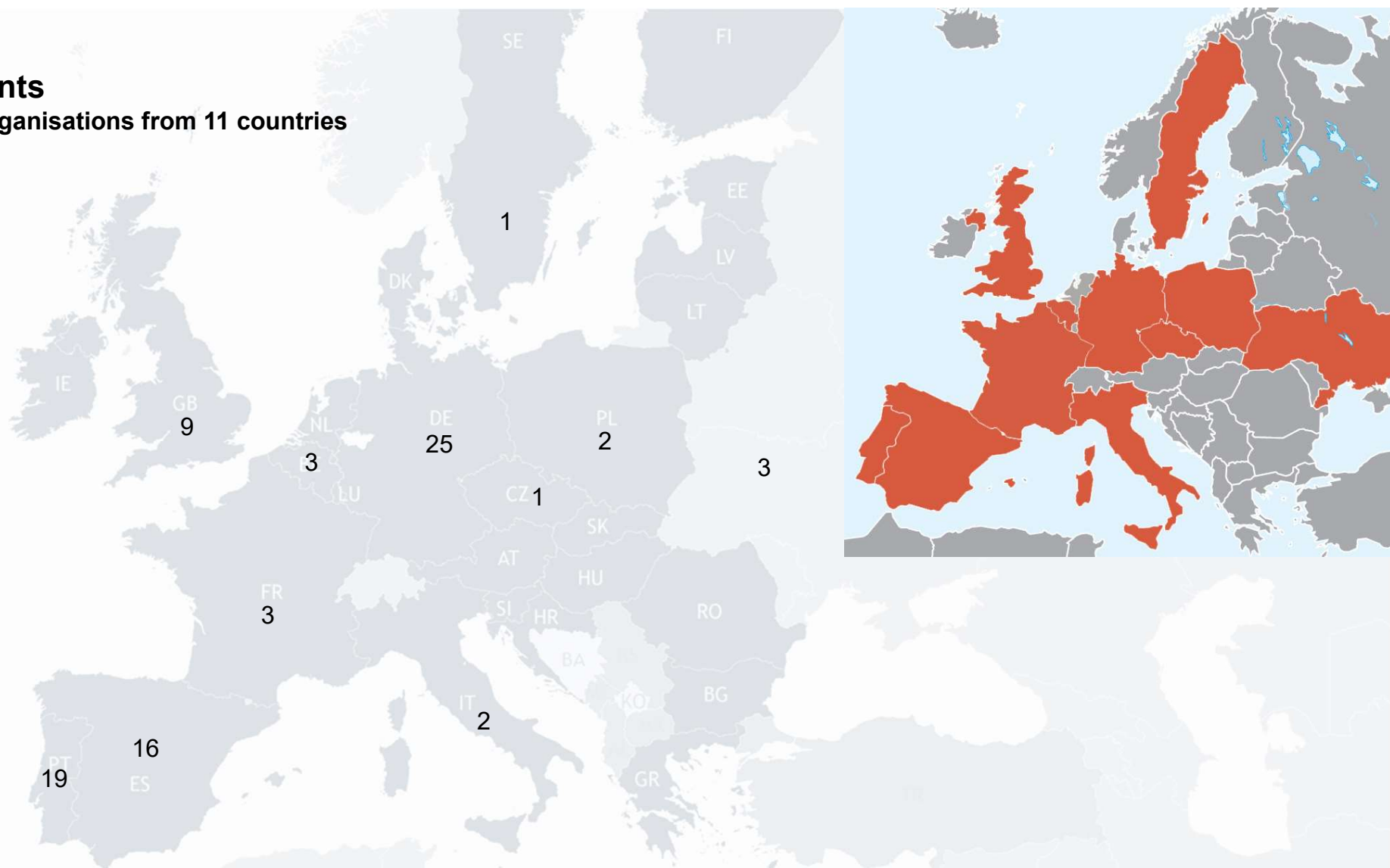
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Participants

84 sites / organisations from 11 countries



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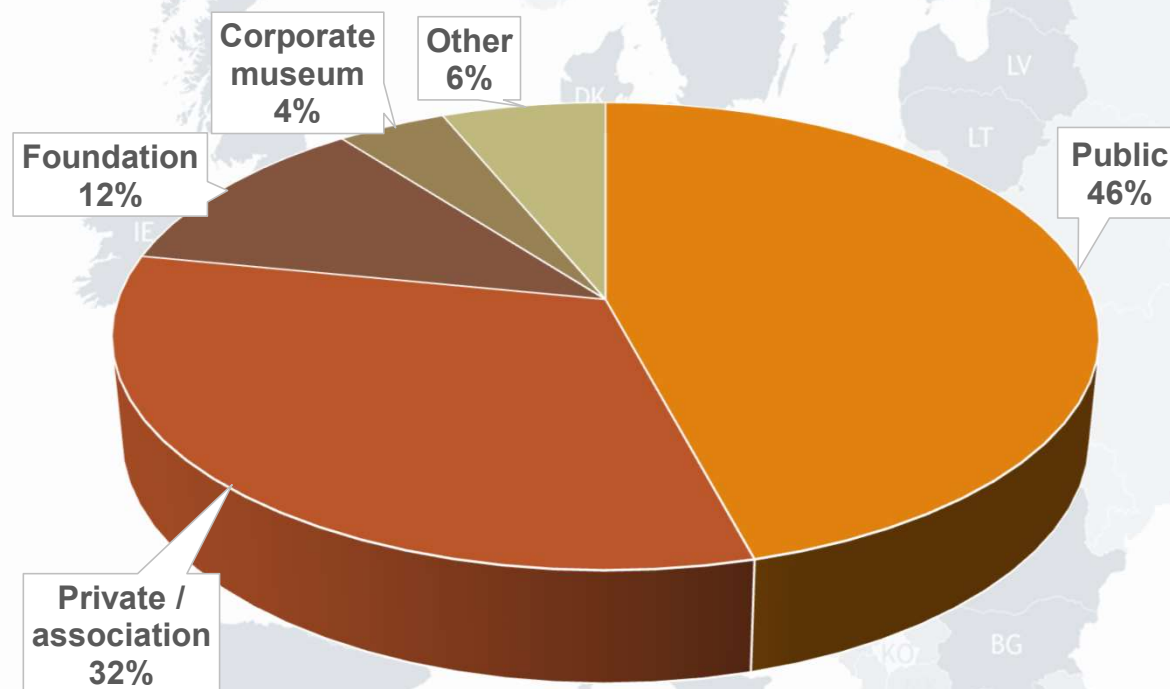
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Status of your location



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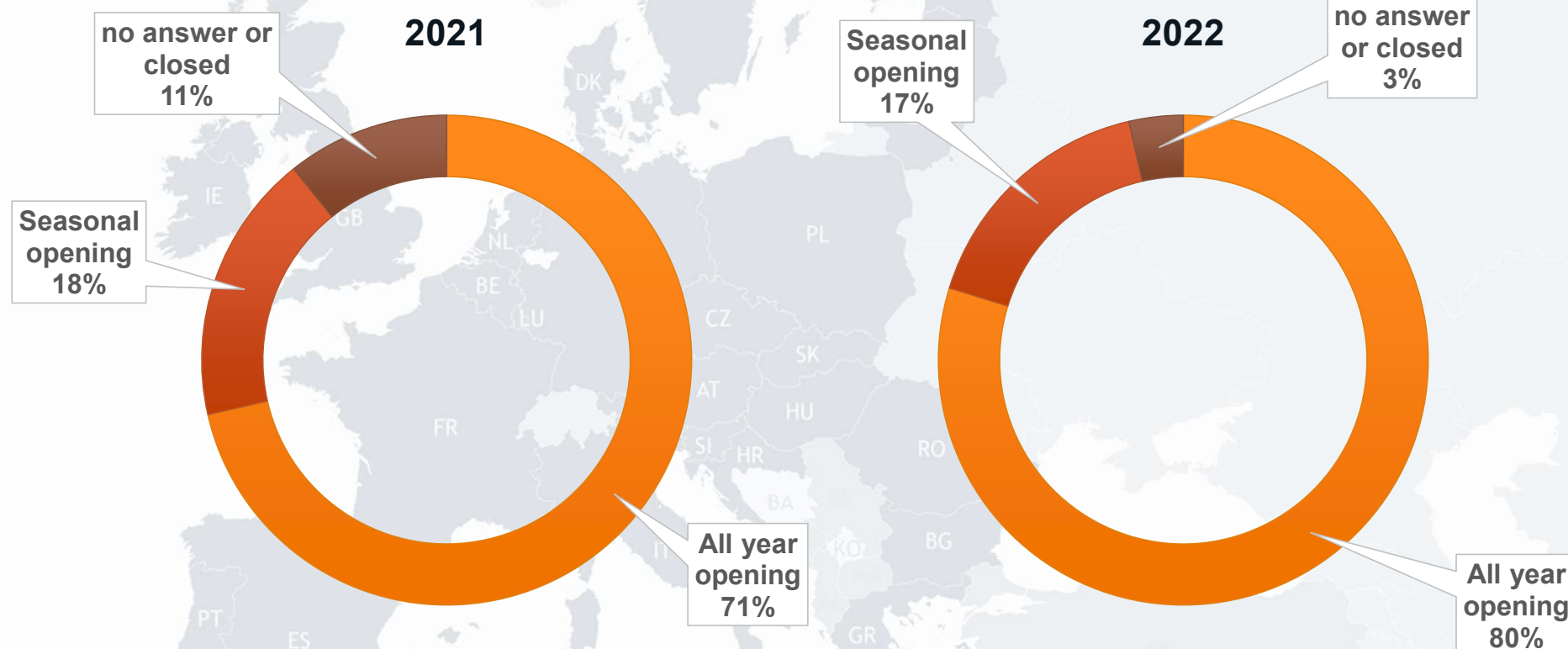


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Opening hours



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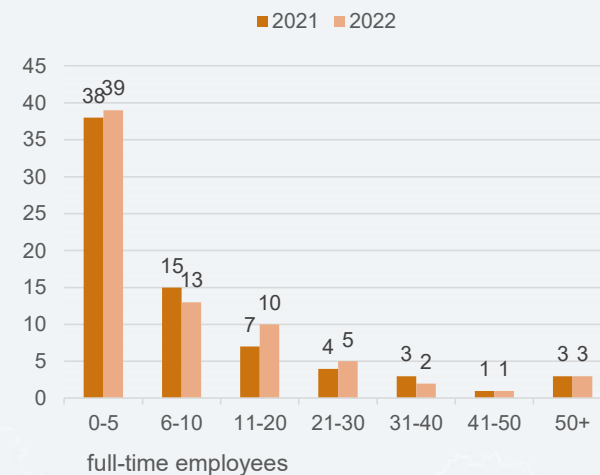
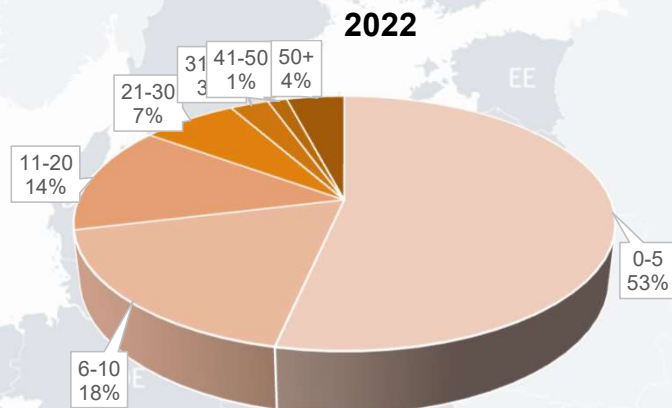
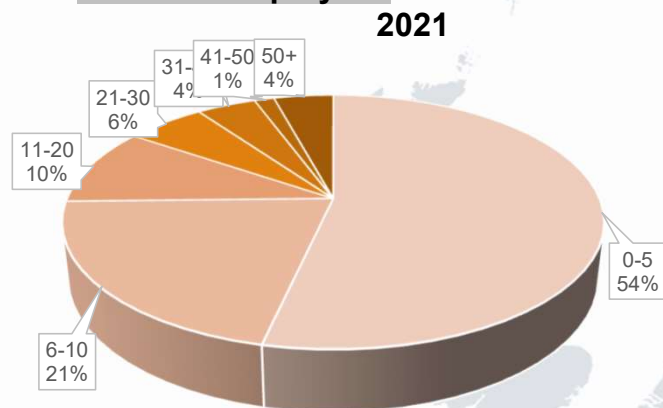
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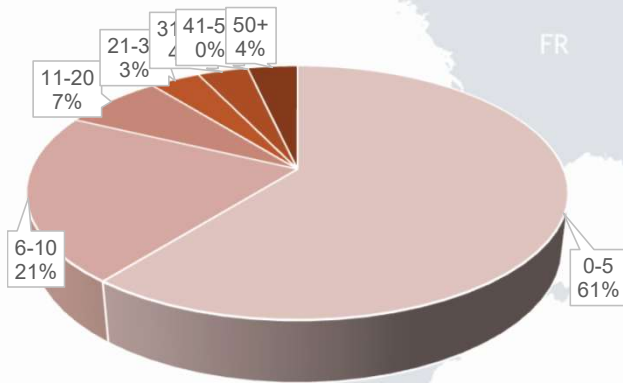
Staff 2021 / 2022

Full-time employees

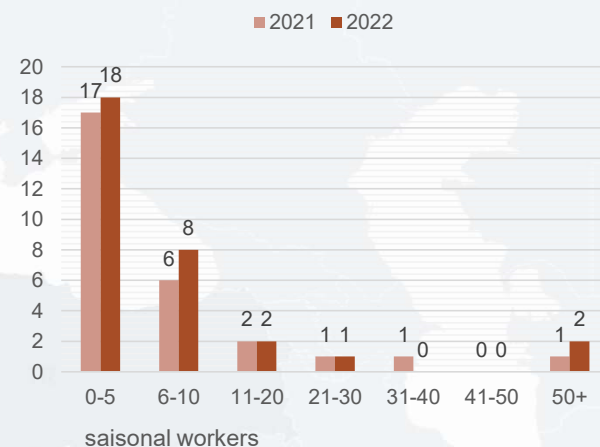
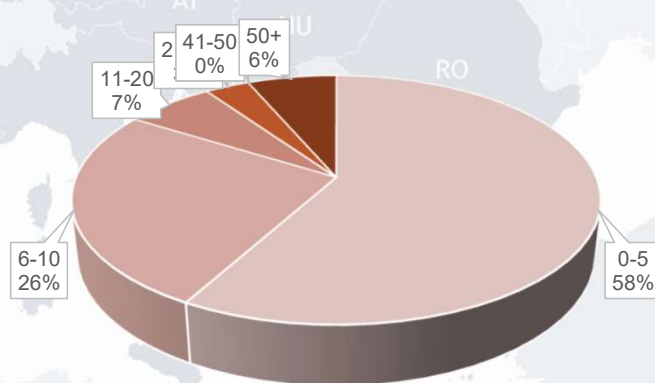


Saisonal workers

2021



2022



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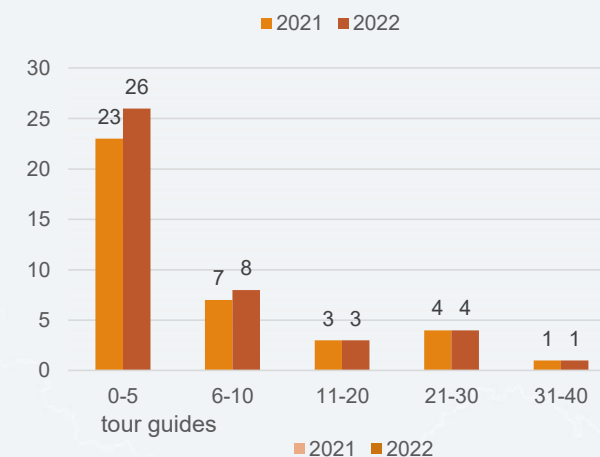
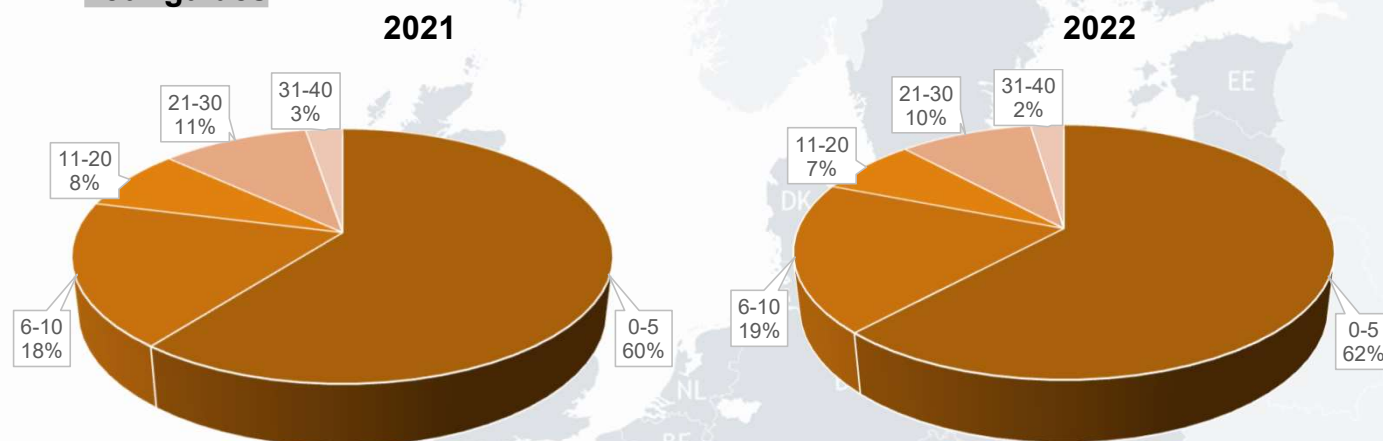
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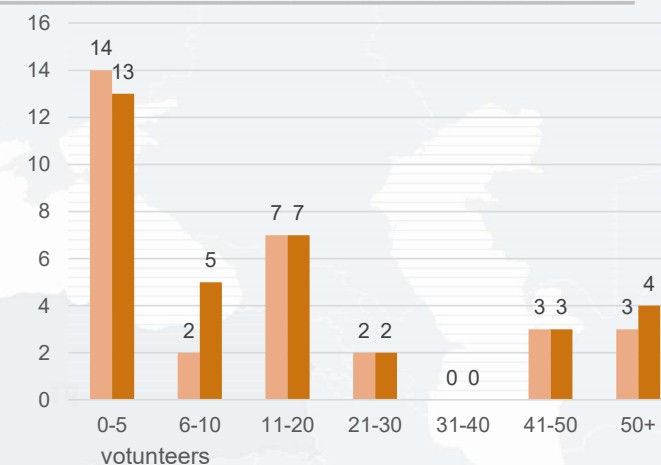
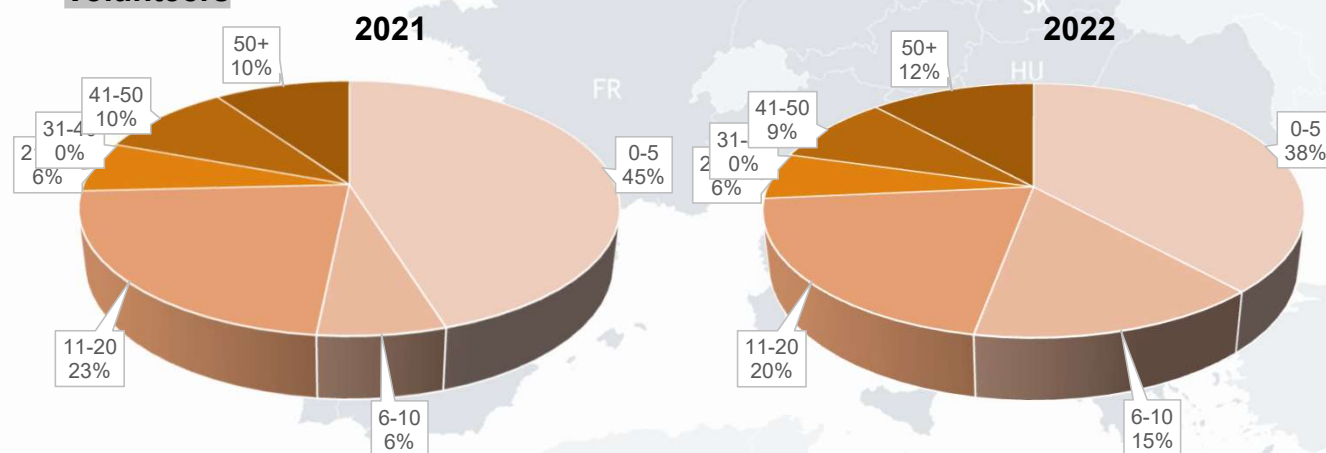


Staff 2021 / 2022

Tour guides



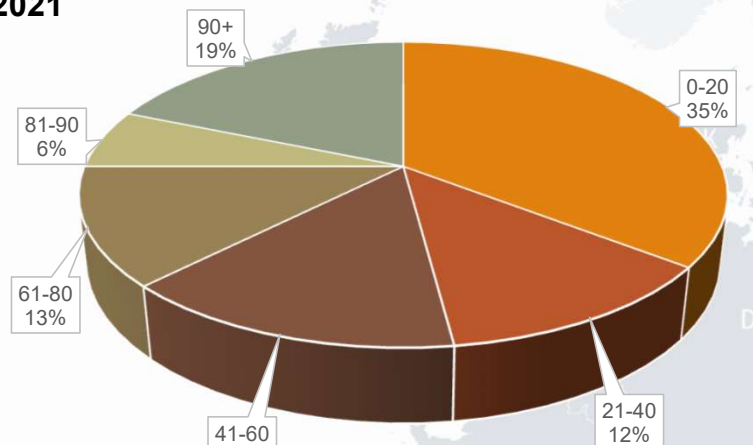
Volunteers



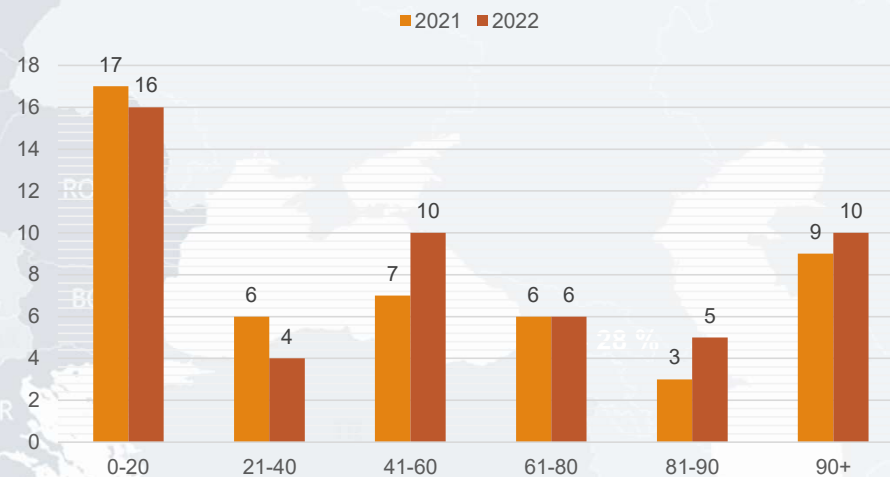
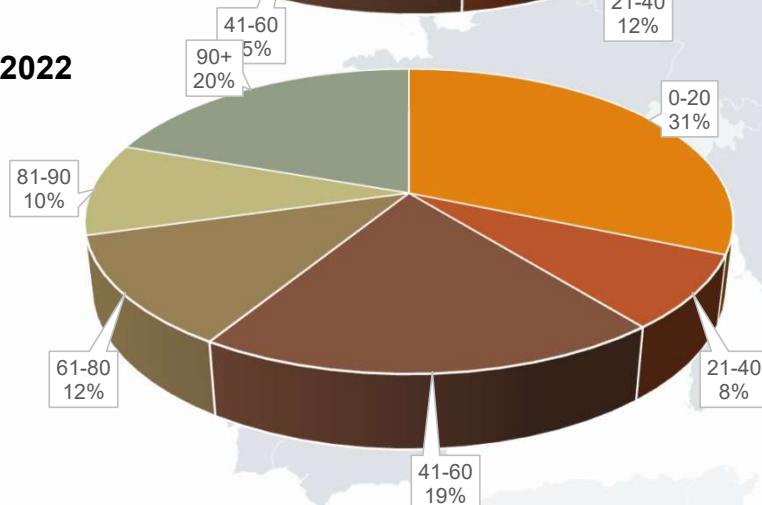
Funding of running costs 2021 / 2022

Revenues (in percent of total)

2021



2022



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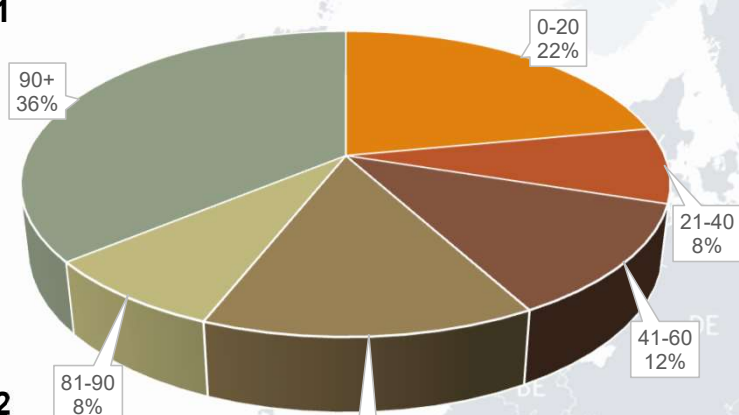
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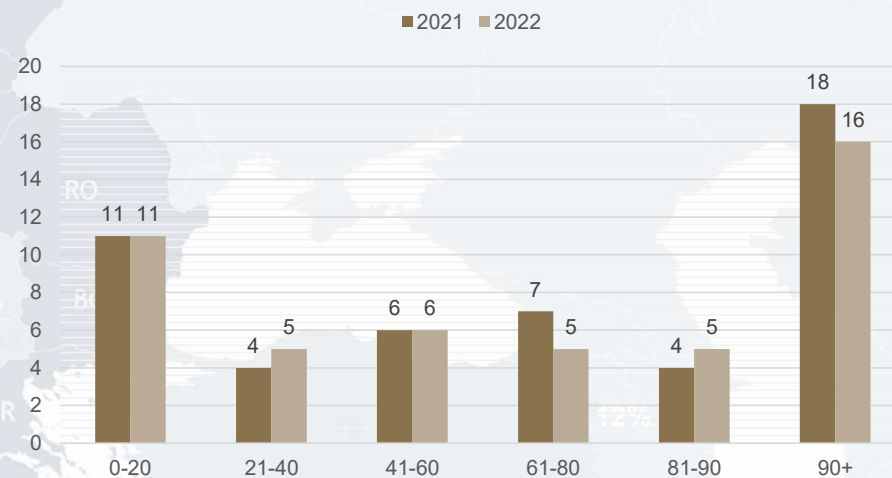
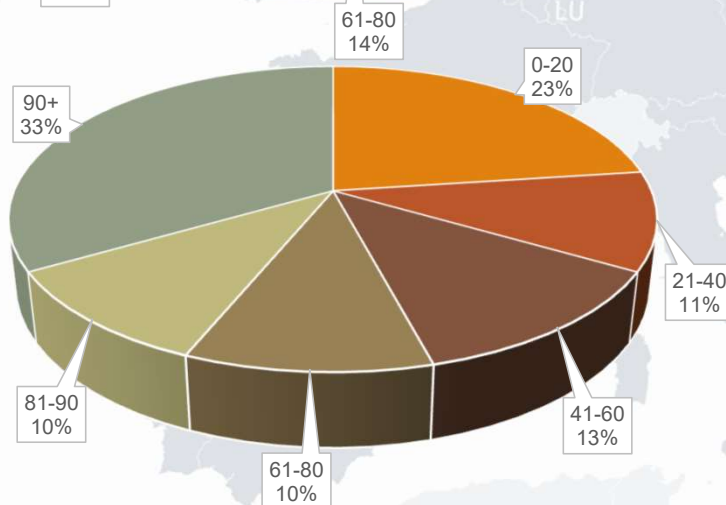
Funding of running costs 2021 / 2022

Public funding (in percent of total)

2021



2022



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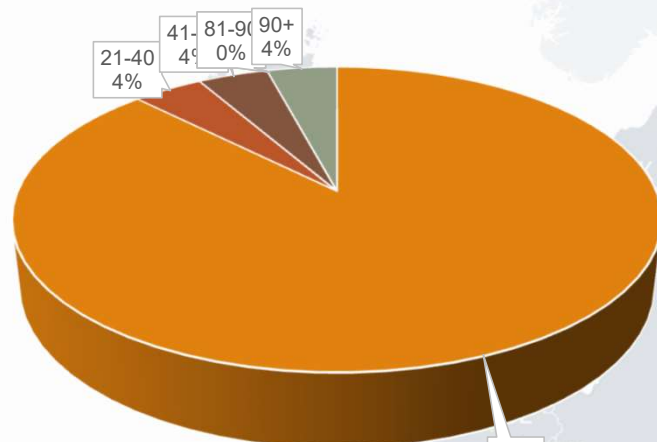
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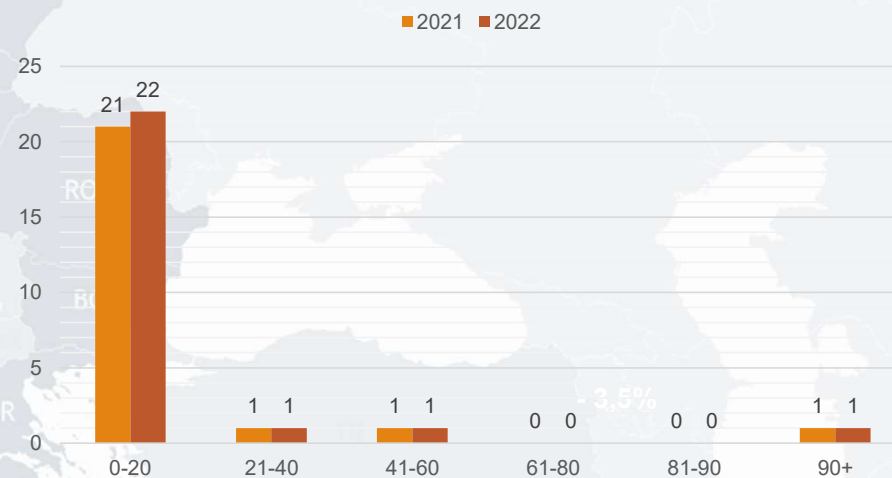
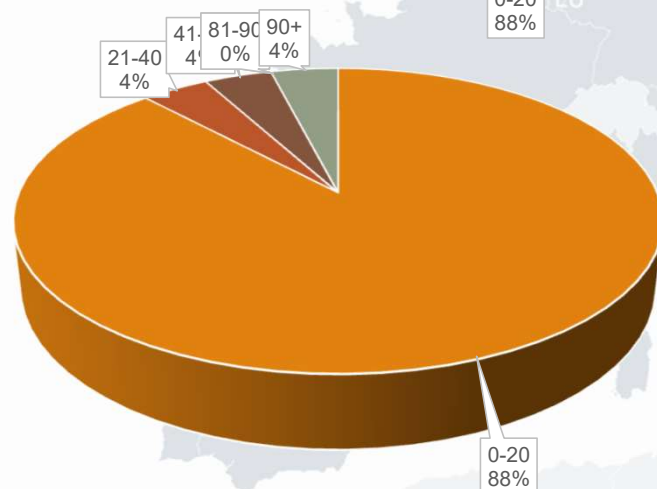
Funding of running costs 2021 / 2022

Donations (in percent of total)

2021



2022



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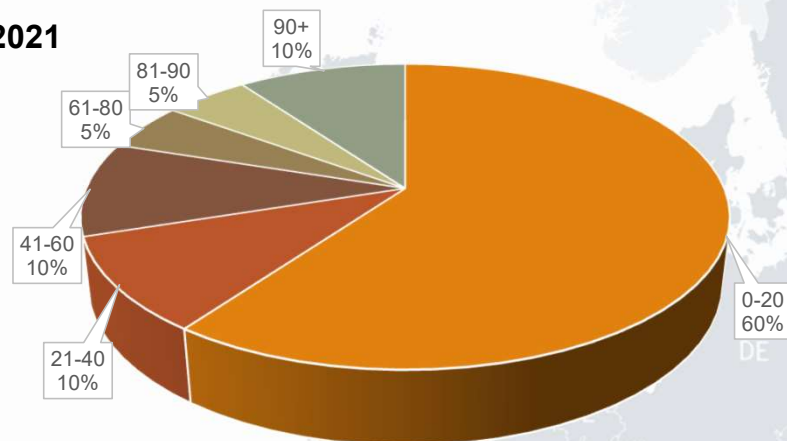
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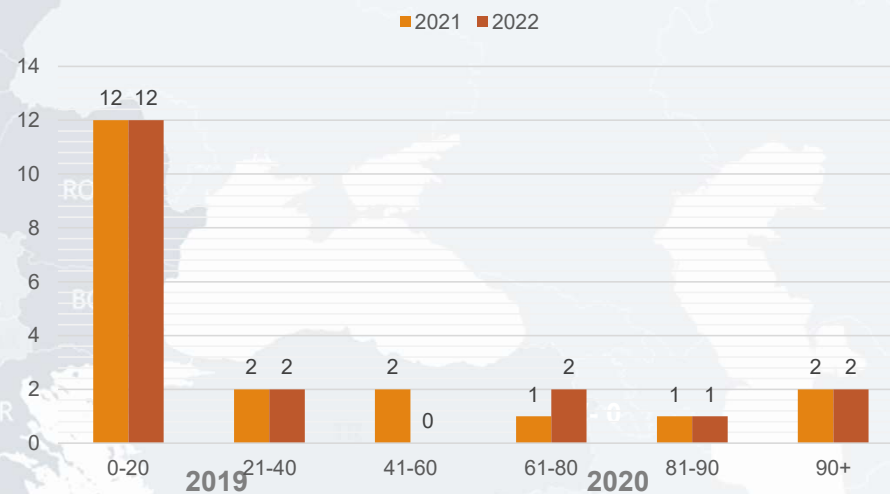
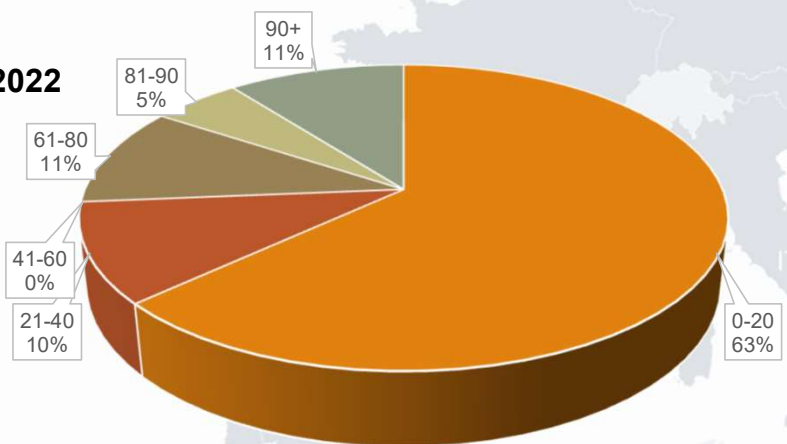
Funding of running costs 2021 / 2022

Other subsidies (in percent of total)

2021



2022



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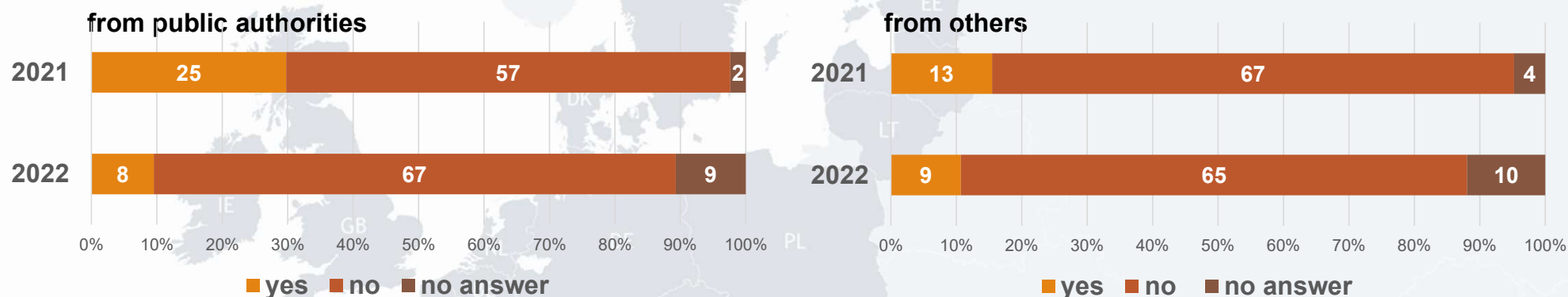
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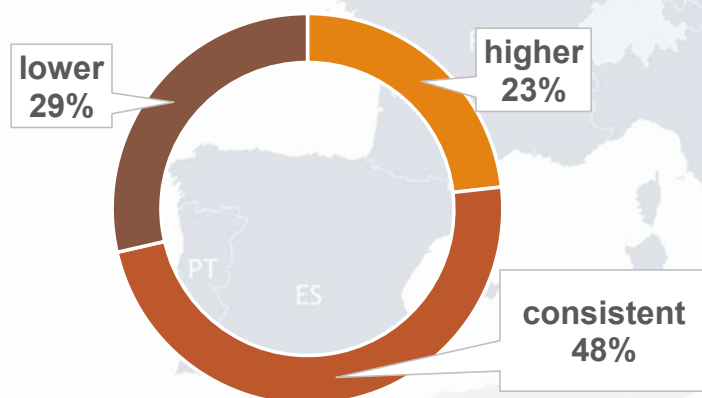
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Funding of running costs 2021 / 2022

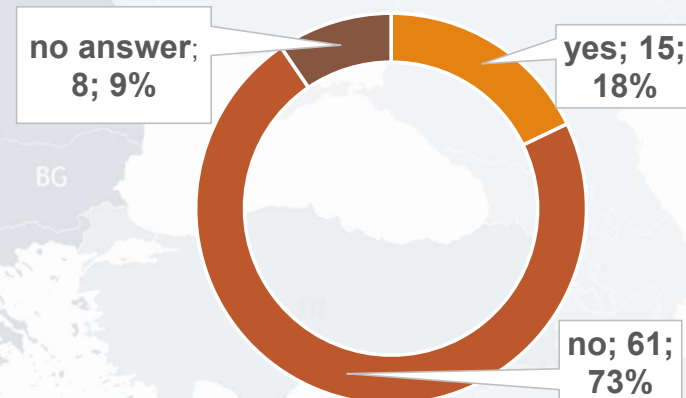
Financial support for loss of income due to Corona



Public funding in 2022 ... than in 2021



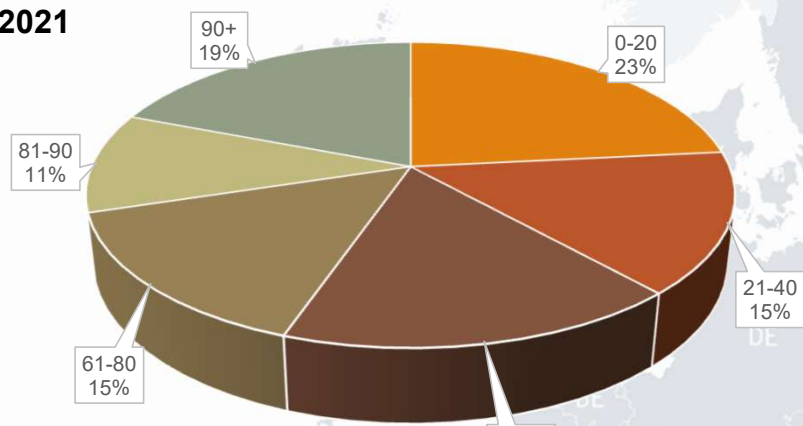
Site operation permanently at risk



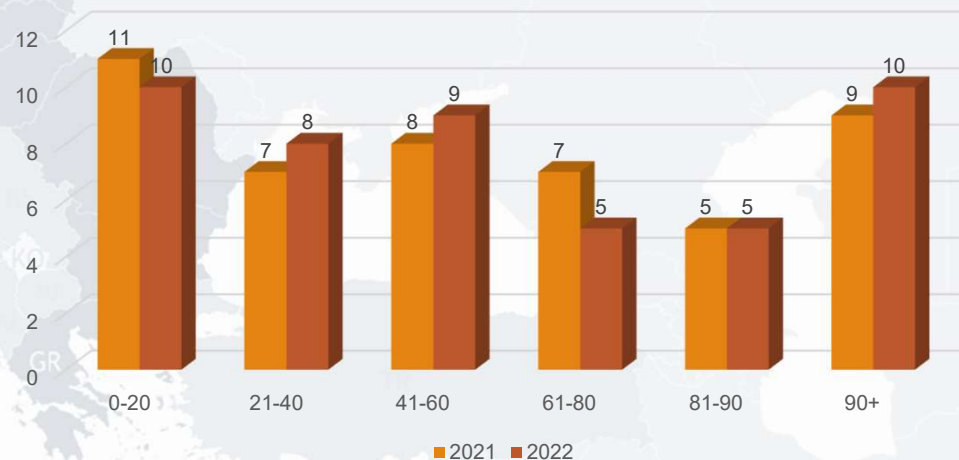
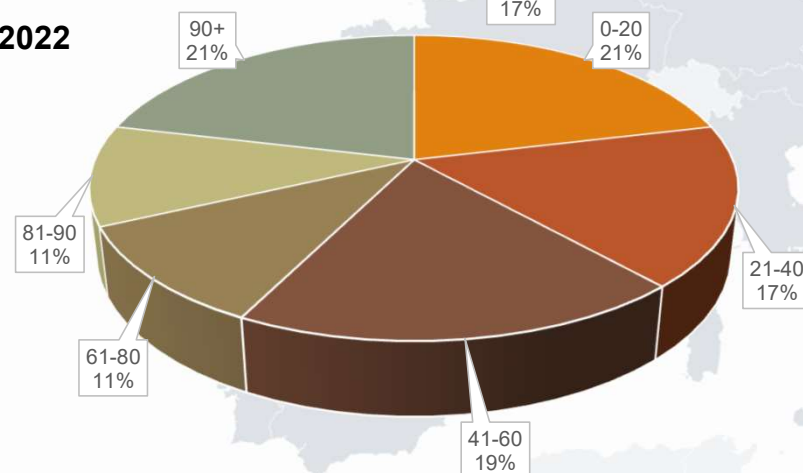
Composition of income (percentage of overall income) 2021 / 2022

Entrance fee

2021



2022



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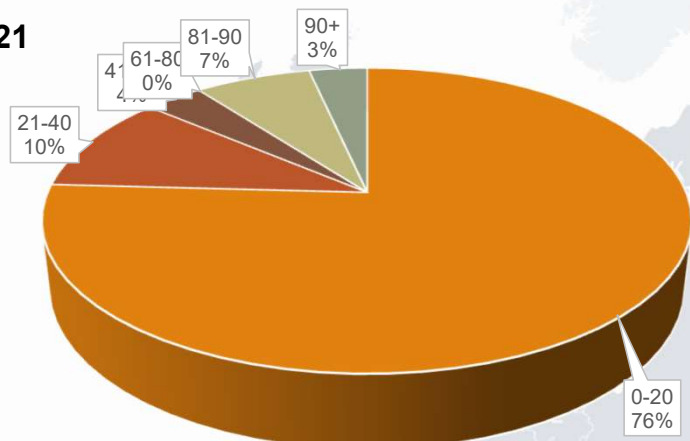
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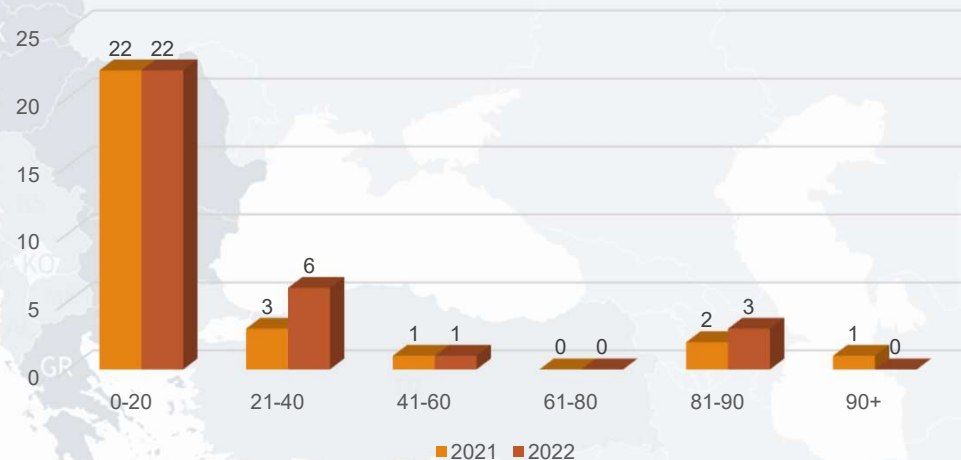
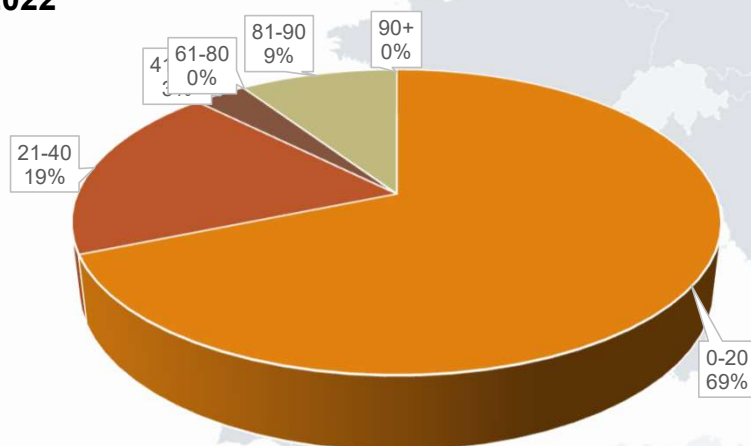
Composition of income (percentage of overall income) 2021 / 2022

Rentals

2021



2022



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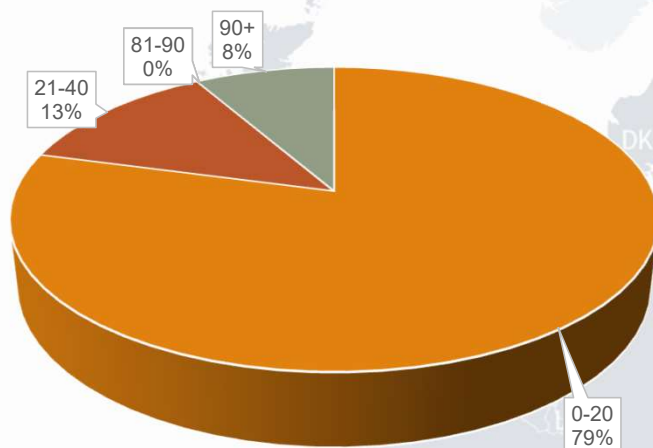


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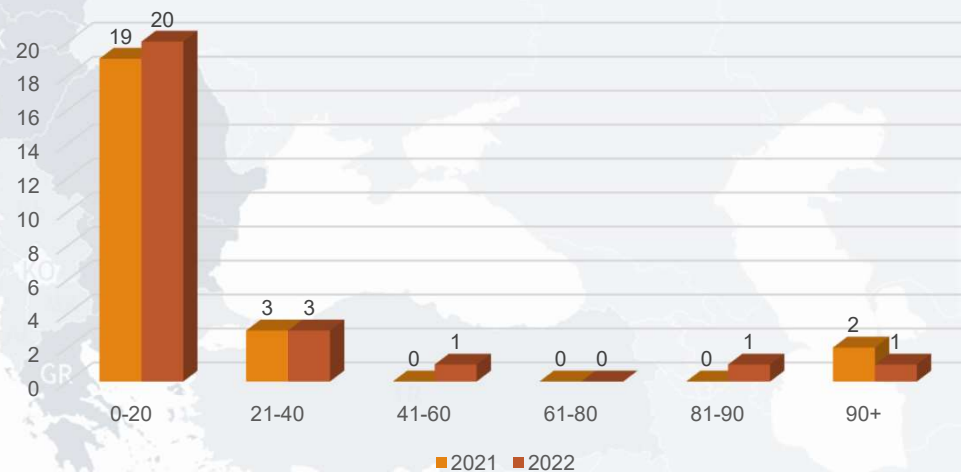
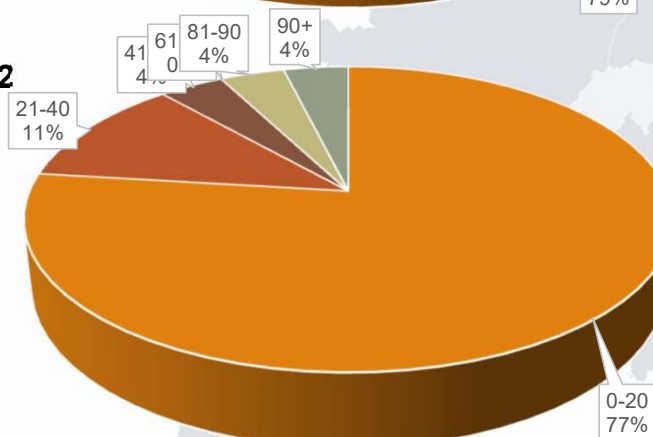
Composition of income (percentage of overall income) 2021 / 2022

Events

2021



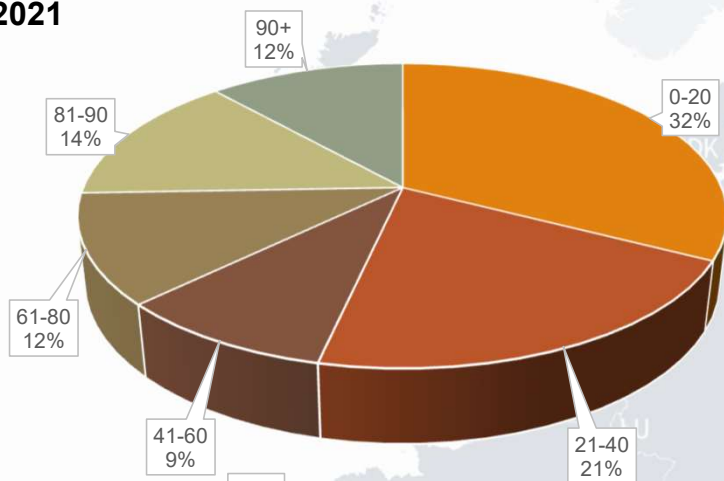
2022



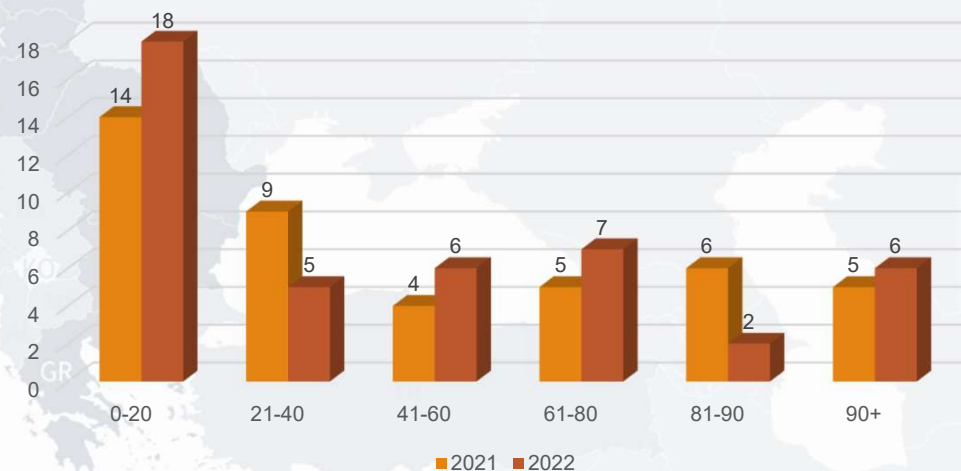
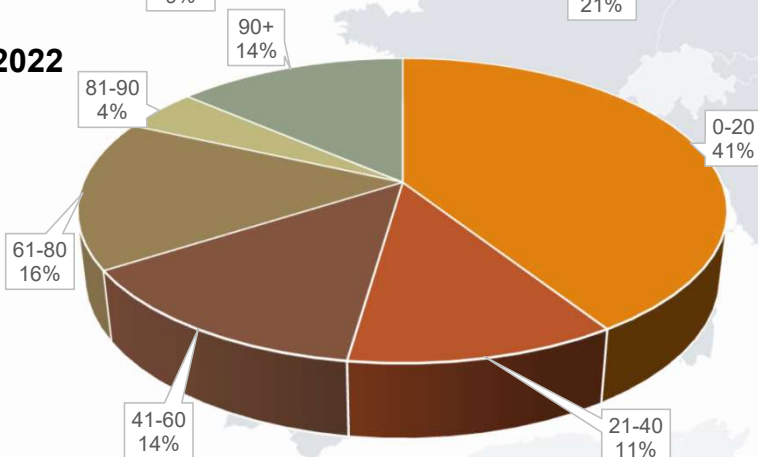
Composition of income (percentage of overall income) 2021 / 2022

Others

2021



2022



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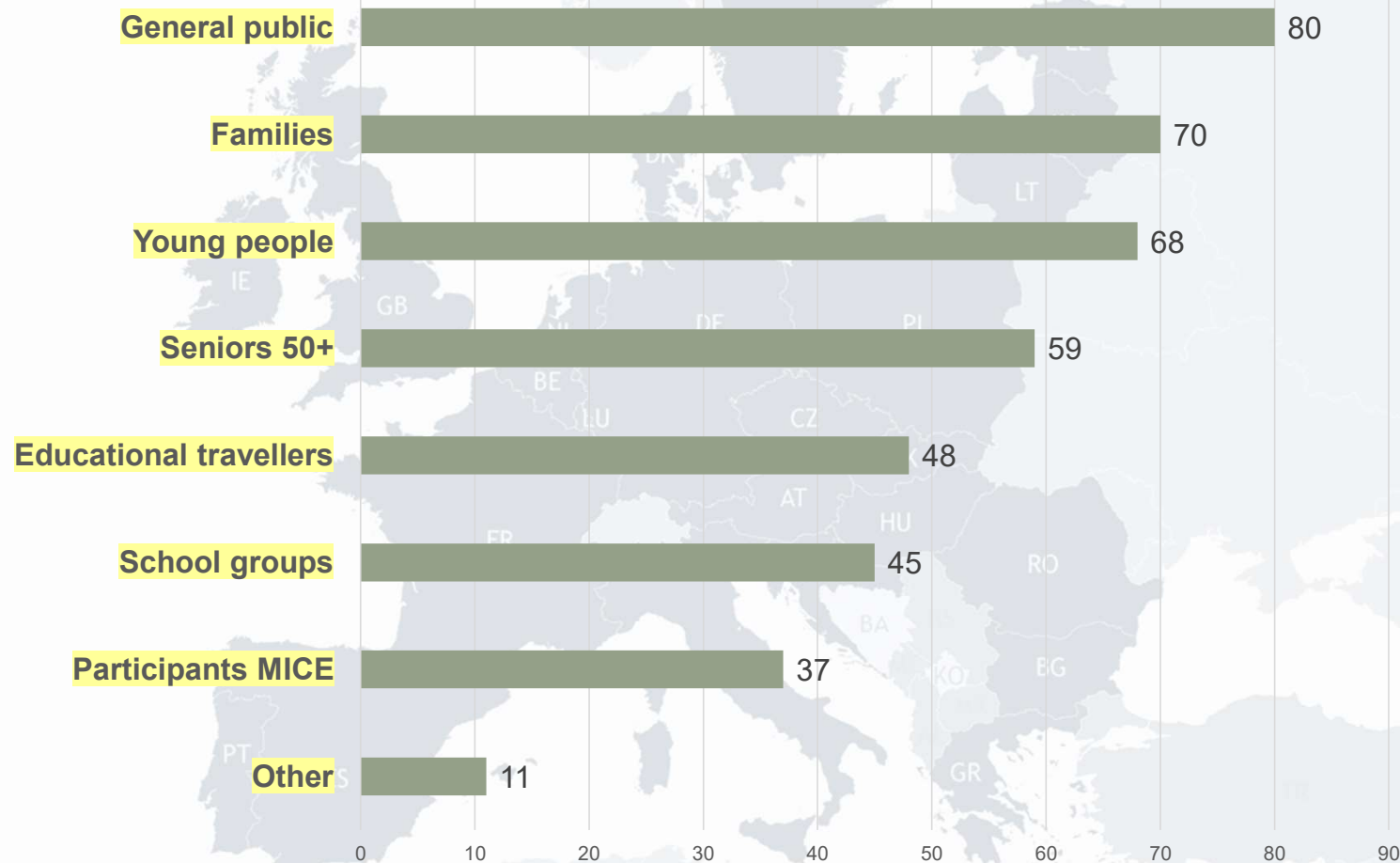
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Which is your target audience?

(multiple answers possible)



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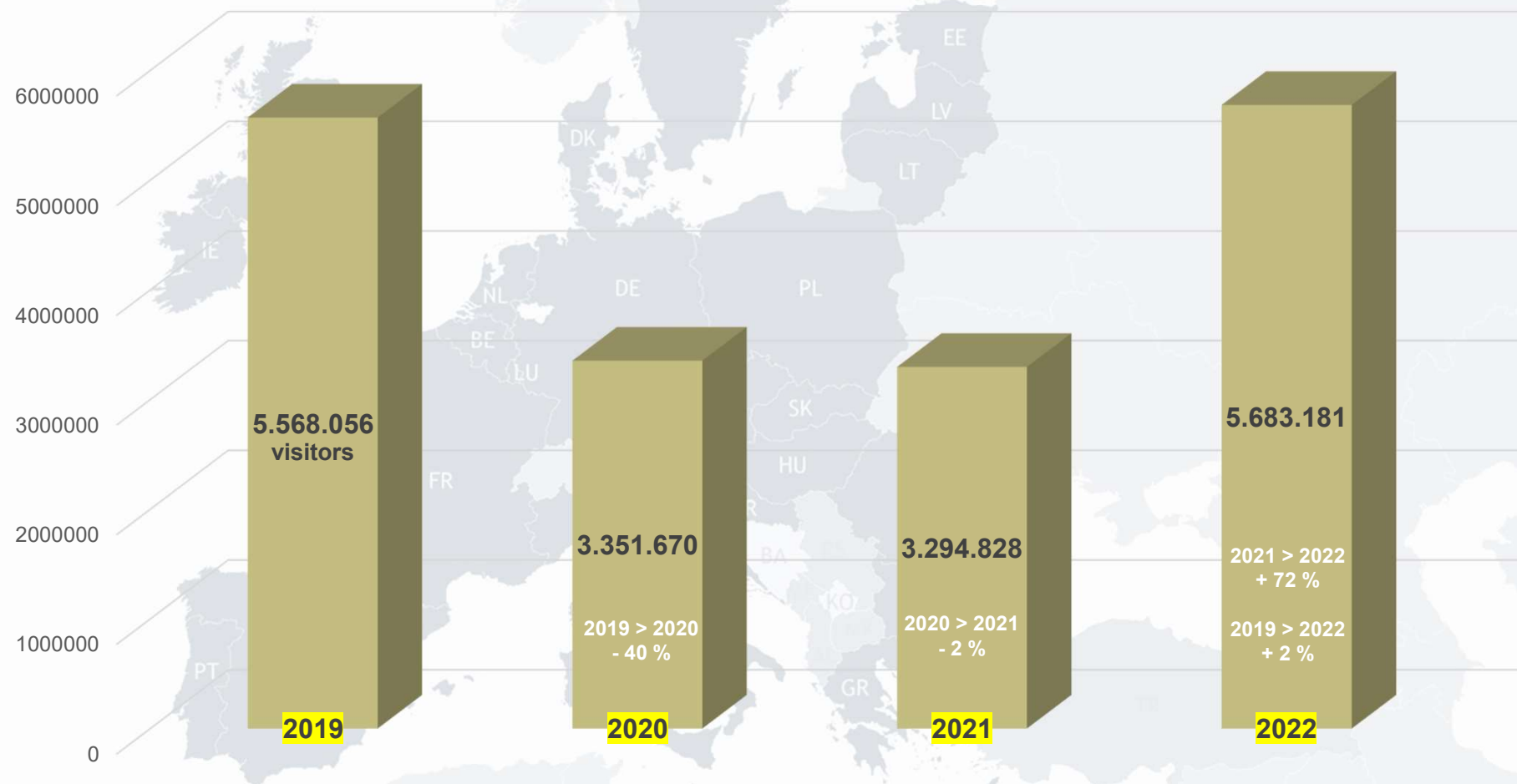
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How many visitors did your site receive in the last years?

Total number of visitors at all participating sites 2019 / 2020 / 2021 / 2022



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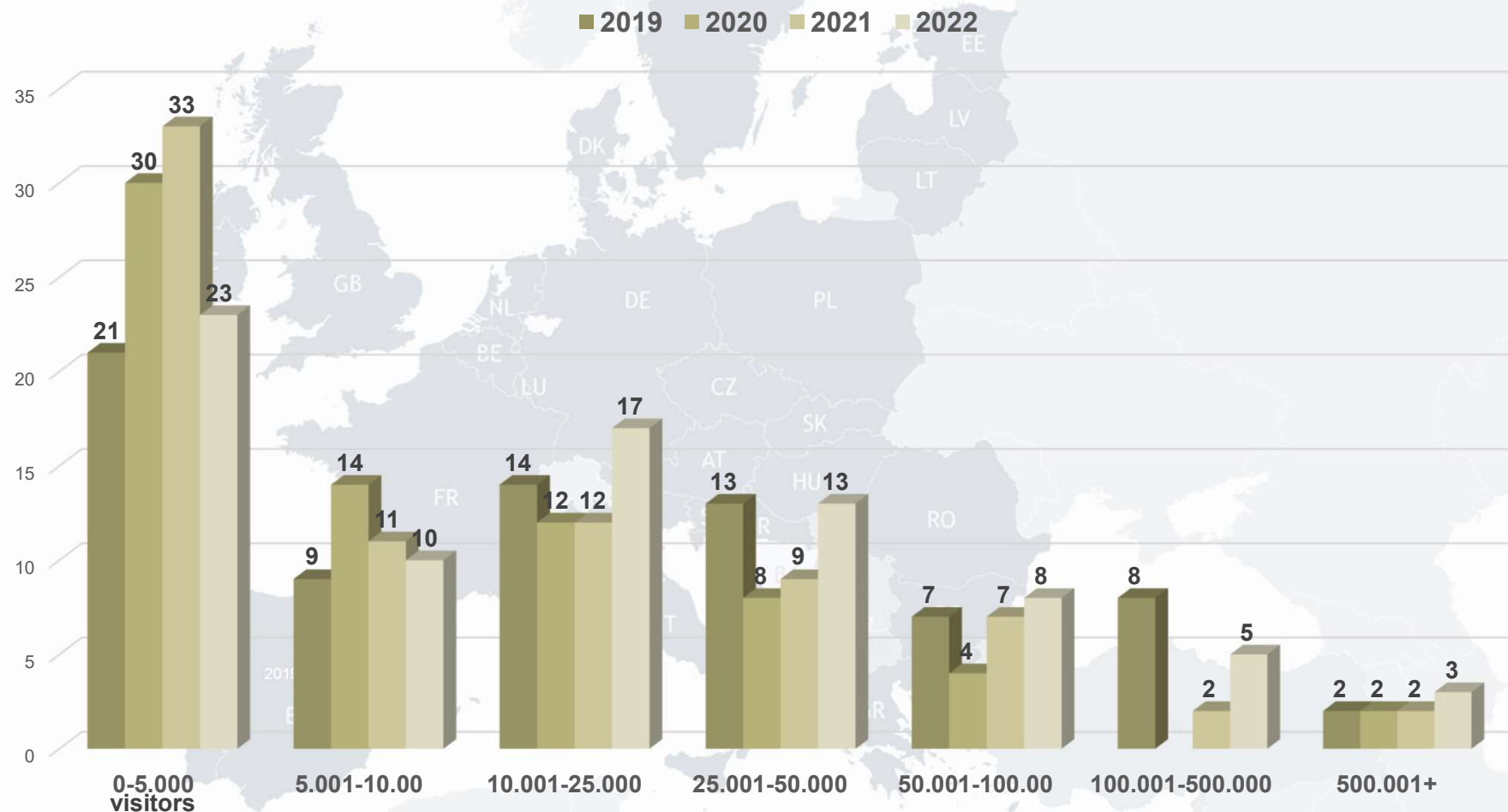
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How many visitors did your site receive in the last years?

Visitors per site 2019 / 2020 / 2021 / 2022



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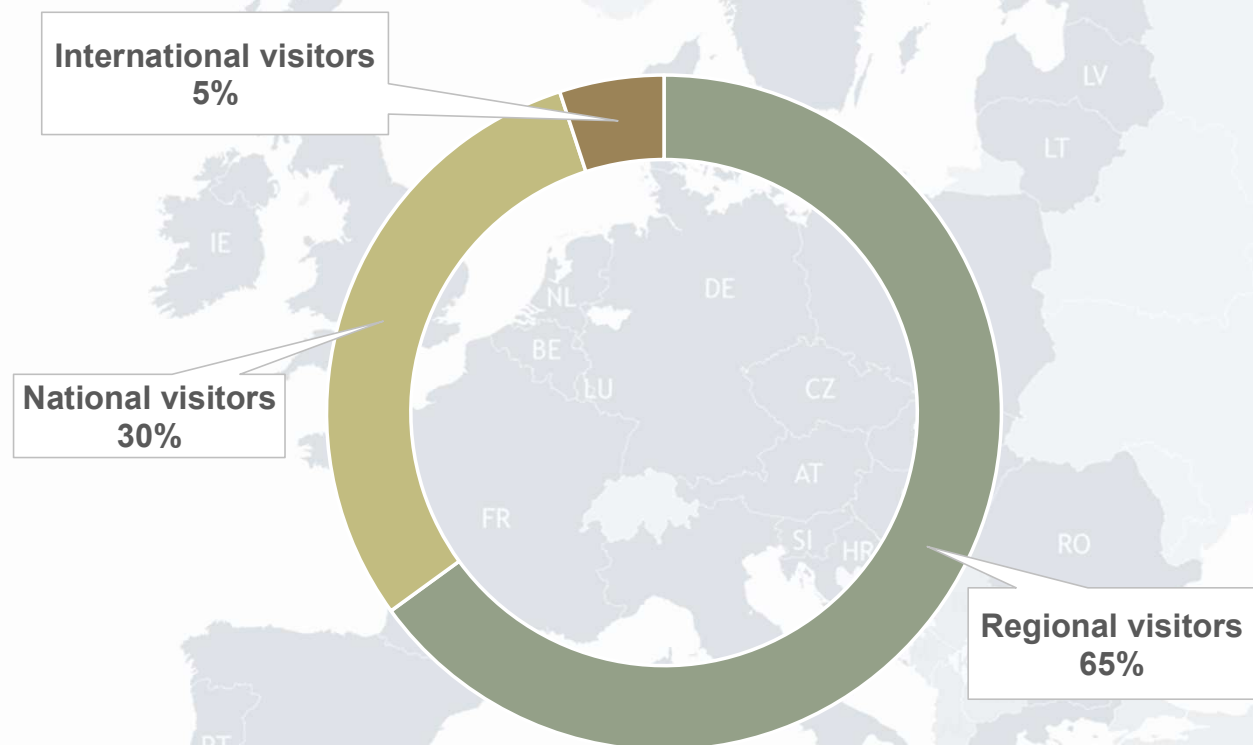


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Where do your visitors come from?



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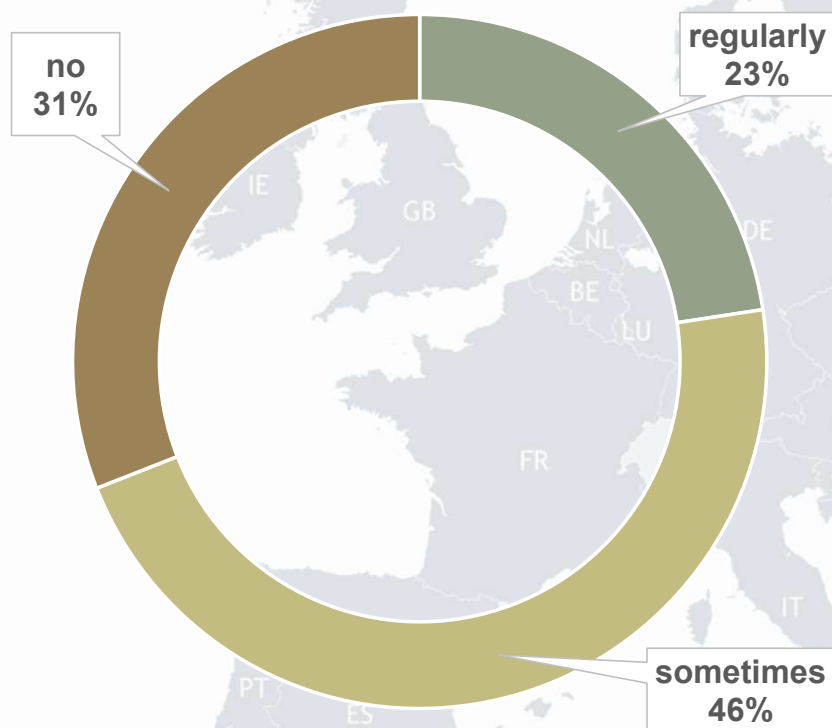


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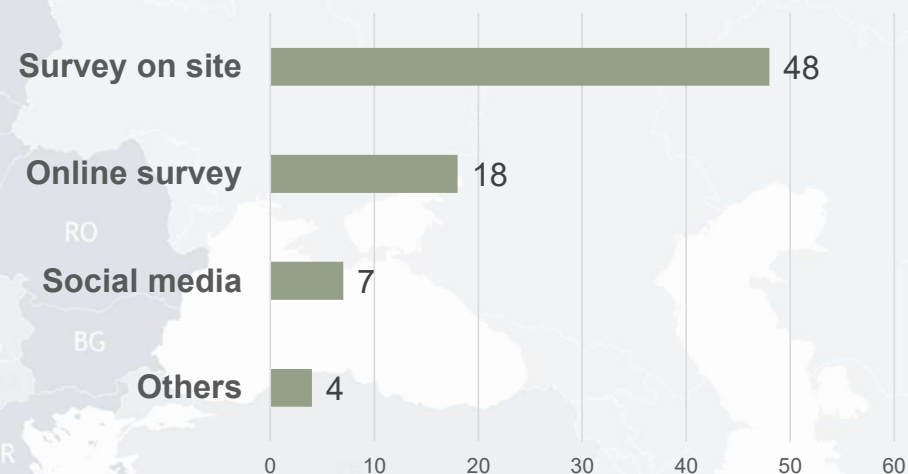
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Do you carry out visitor surveys?



If so, in following form:



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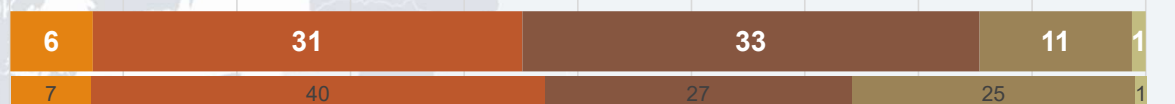
How would you rate 2023 for your site in terms of the following?

Environment

very positive positive satisfactory negative very negative

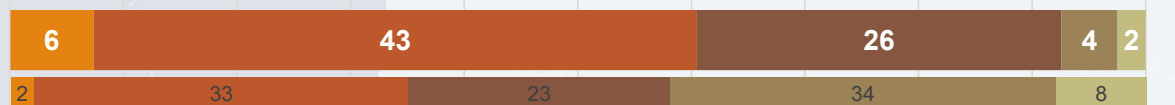
Regional consumer climate

2021



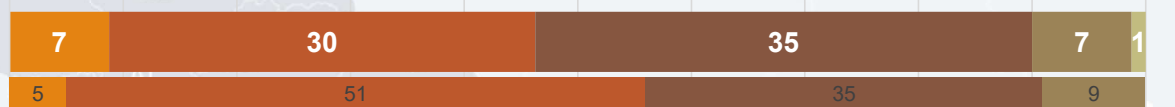
Visitor numbers

2021



Own competitiveness / market competition

2021



General cost increase / inflation

new question in 2023



Political support

2021



2021 =
for comparison: answers in Industrial Heritage Barometer 2020/21



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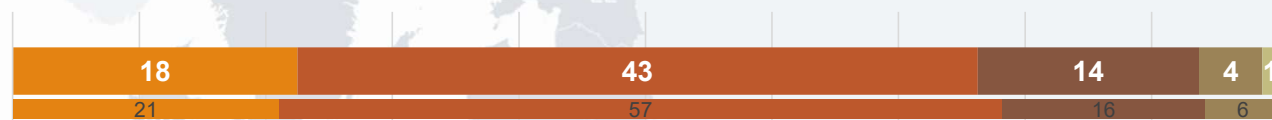
How would you rate 2023 for your site in terms of the following

Own site

very positive positive satisfactory negative very negative

Site's attractiveness and appeal

2021



Financial resources

2021



Energy costs

new question in 2023

Targets for climate neutrality

new question in 2023

Staffing

2021



Trends in visitor numbers

2021



Expected economic outcome

2021



2021 =
for comparison: answers in Industrial Heritage Barometer 2020/21

What were your 3 key objectives for 2023 ?

TOP 10



What were your 3 key objectives for 2021 ?

TOP 10



for comparison: answers in Industrial Heritage Barometer 2020/21



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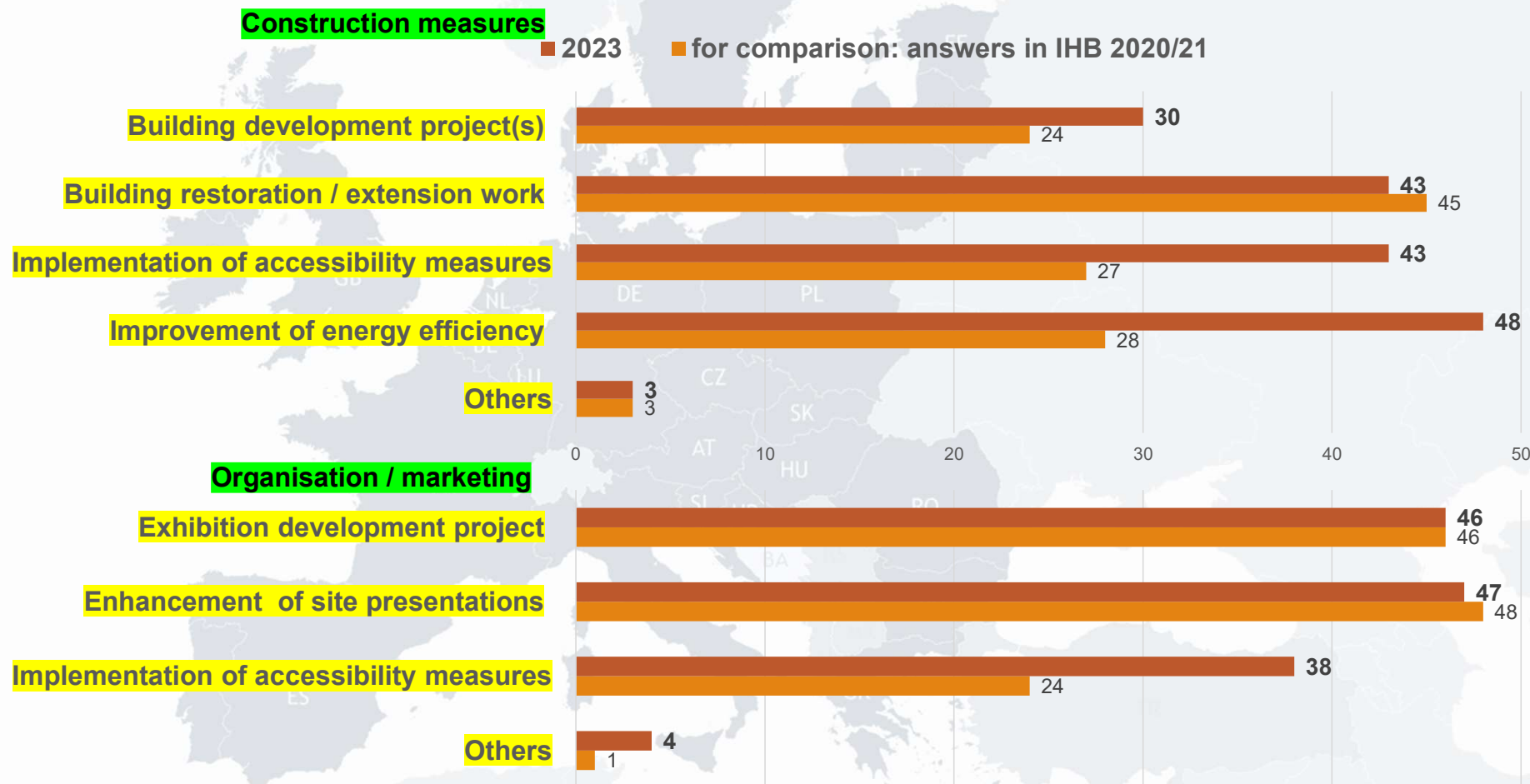
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Which of the following actions form part of your current strategy?

(multiple answers possible)



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Which of the following actions form part of your current strategy?

(multiple answers possible)

Exhibitions / presentations

■ 2023 ■ for comparison: answers in IHB 2020/21

Adressing new target groups

Extension of opening hours

Reduction of opening hours

Stronger focus on communication/marketing

Cost reduction

Alteration of prices

Staff recruitment

