

KAPYAD VIEWS AND RECOMMENDATIONS ON INCREASING THE LENGTH OF STAY IN CAPPADOCIA

Cappadocia is one of Turkey's most distinctive tourism regions, globally recognized for its hot air balloon flights and rock/boutique hotels, hosting approximately 2 million domestic and international tourists annually. The "**Cappadocia**" brand is one of our country's strongest brands worldwide.

In contrast, **the average length of stay** for tourists in Cappadocia hotels is **1.8 nights**. From the perspective of sustainable tourism objectives, this rate is unacceptable and constitutes one of the most fundamental problems of regional tourism.

Globally, destinations with an average length of stay below 3 nights are virtually non-existent. Advances and investments in the Cappadocia region aiming for an increase to **2.5 nights** in the short term would signify an approximately **40% increase** in occupancy, even if the number of tourists remained constant. When the target of **3 nights** is reached in the medium term, an increase of **65%+** in occupancy will be possible, even without an increase in tourist numbers.

The average length of stay in some other tourism destinations is as follows:

- Istanbul: 3.2
- Paris: 3.5
- Rome: 3.4
- Florence & Tuscany: 3.2
- Dubai: 4.2
- Patagonia: 4.5
- Santorini: 6.1

As a civil society organization that believes in the importance of State-NGO cooperation, this report, which consists of topics that can be implemented within 3 years, presents the current situation and data in a straightforward and actionable manner.

PROPOSAL-1: CAPPADOCIA ARCHAEOLOGY MUSEUM

1. Current Situation

- The archaeological heritage of the region covers not only Nevşehir but also the provinces of Kayseri, Niğde, Aksaray, Kırşehir, and Yozgat.
- Artifacts belonging to Cappadocia's civilizations are scattered across different provinces.
- Although these provinces possess extremely valuable artifacts related to Cappadocian civilizations, visitor numbers to the museums are low, and many precious artifacts are stored idly in warehouses.
- The existing Nevşehir Museum is closed, and the Ürgüp Museum is small and dysfunctional.
- Domestic and international visitors who experience the region's nature and accommodation cannot sufficiently access its historical and archaeological dimension.

2. Proposal

CAPPADOCIA ARCHAEOLOGY MUSEUM

A museum of international standards, built in a location suitable for the general tourism traffic of Cappadocia, where archaeological artifacts currently waiting idly in Nevşehir and neighbouring regional provinces (Kayseri, Niğde, Aksaray, Kırşehir, and Yozgat) are compiled and exhibited.

Functions to be Included in the Museum:

- Main archaeology galleries
- Temporary exhibition areas
- Digital & interactive experience sections
- Library and research center
- Conference and event hall
- Museum Shop and Museum Cafe

Architectural Approach: Signature design, in harmony with Cappadocia's natural stone texture, equipped with sustainable energy solutions, and partially embedded underground.

Important Note: As seen in the examples of the Louvre-Lens (France) and Guggenheim Bilbao (Spain), museums can multiply the brand value of destinations.

By implementing the "Cappadocia Archaeology Museum" in an area compatible with the current tourism traffic, in line with regional tourism strategies, it will both bring the cultural heritage of Nevşehir and surrounding provinces to a wider audience and add significant value to Cappadocia's holistic tourism vision.

3. Expected Results

Cappadocia Archaeology Museum

- It is projected to attract more than **500,000 annual visitors** to the museum, based on the assumption that 25% of the 2 million tourists visiting Cappadocia will visit the museum.
- It will generate over **€70 million in additional tourism revenue** annually, through entry fees and museum side income, as well as the additional accommodation, food and beverage, and other revenues resulting from an increase of **0.5 nights** in the length of stay.
- It will increase the region's **length of stay**.
- It will create approximately **500 additional direct and indirect jobs**.
- It will enhance the visibility of cultural heritage.
- It will make a significant contribution to **the brand value of the Cappadocia** destination, as seen in the examples of the Louvre-Lens (France) and Guggenheim Bilbao (Spain).
- It will elevate the region to the international platform not only with nature and balloon tourism but also with **cultural heritage tourism**.
- The Conference and Event areas within its structure will significantly contribute to Cappadocia's **Meeting, Congress, and Event tourism**.

This investment should be considered not just a museum, but a **strategic cultural move** that will carry the historical soul of Cappadocia into the future.

PROPOSAL-2: ST. GEORGE CULTURAL HERITAGE STRATEGY

1. Current Situation

- Cappadocia is a vast geography covering not only Nevşehir but also parts of Kayseri, Niğde, Aksaray, and Kırşehir provinces.
- The region holds worldwide importance not only for its fairy chimneys but also for its **early Christian heritage**.
- St. George is referred to in the literature as "**St. George of Cappadocia**". He is the patron saint of many countries, regions, and cities such as England, Georgia, Greece, Russia, Portugal, Spain (Catalonia and Aragon regions), Brazil (Rio de Janeiro), Romania, Serbia, Ethiopia, and Malta. He is a very important holy figure for all Latin American countries, especially Brazil. Over 100,000 churches worldwide bear his name, and he is a religiously and culturally significant symbol for more than 500 million people.
- **St. George of Cappadocia** is a universal saint revered by both **the Eastern Orthodox Church and the Catholic Church**. Known in the Christian world as the "soldier-saint who defeated the dragon," he is one of the most depicted saints in Orthodox iconography, as well as being accepted as a patron saint in Catholic countries.
- His death day is accepted as **April 23rd**, which is celebrated as **St. George's Day** in all the countries, cities, and regions where he is the patron saint.
- It is firmly established in all sources that he was born in Cappadocia. There is a strong historical and cultural belief regarding St. George's birth around the **Güzelöz and Soğanlı Valley**. However, the faith heritage, including the Sobesos Ancient City and Soğanlı Valley churches, is not being presented with a holistic strategy. The work of the Turkish Tourism Promotion and Development Agency (TGA) on this subject is extremely insufficient.
- Visitors focus on the nature and balloon experience, and **faith and culture tourism**, which is our strongest marketing weapon, is not sufficiently developed.
- The studies concerning **the St. George heritage** have been regularly presented to the relevant authorities in all reports prepared by KAPYAD since its foundation. Prior to the establishment of KAPYAD, this issue was first brought to the agenda in **2019** by the current KAPYAD Chairman, Ömer Tosun, in his capacity as the Honorary Consul of Brazil for Nevşehir and Kayseri and a Board Member of TTYD (Turkish Tourism Investors Association). Within the scope of the said initiative, the matter was reported to the **Ministry of Culture and Tourism**, and a **series of field trips and inspection studies** were conducted with the participation of the Governor of Kayseri, Members of Parliament, and the Provincial Director of Culture and Tourism of the time.
- By a Presidential decree in **November 2024**, the Soğanlı region was included within the boundaries of the Cappadocia Area Directorate.
- Restoration works have been initiated in the region, partly influenced by the efforts of KAPYAD.

2. Proposal

ST. GEORGE CULTURAL HERITAGE STRATEGY

It is of great importance to implement a design and promotion strategy along the **Güzelöz - Soğanlı - Sobesos line** in Cappadocia that will make the St. George heritage visible and attract international faith tourism.

- **St. George Monument:** A contemporary monument at the entrance of Güzelöz or Soğanlı Valley that refers to the dragon legend. A minimalist design with natural stone and mosaic motifs. An opportunity for collaboration with a world-famous artist can be created.
- **Restoration Processes:** All restoration work related to the St. George cultural heritage, especially the churches attributed to St. George in this area, can be used as **promotion/marketing arguments** that will echo worldwide.
- **Visitor and Heritage Center:** A museum focused on digital narration; experience with fresco replicas and digital maps.
- **Cultural Routes:** St. George-themed walking/pilgrimage routes; routes connecting the Soğanlı Valley churches and Sobesos can be planned.
- **Local Production & Gastronomy:** Boutique food and beverage and local product sales points can be designed in the villages. The rehabilitation of the settlements and environment, especially in the Güzelöz and Soğanlı region, is valuable.
- Effective, targeted promotion campaigns in cooperation with the TGA are essential.

3. Expected Results

ST. GEORGE CULTURAL HERITAGE STRATEGY

- It will attract **500,000 additional annual visitors** to Cappadocia with only one-thousandth of the target audience.
- It will generate over **€150 million in additional tourism revenue** annually, with the additional accommodation, food and beverage, and other revenues resulting from an increase of **0.7 nights** in the length of stay.
- It will increase the region's length of stay and per capita spending.
- It will make Soğanlı, Güzelöz, and the surrounding area the center of local development.
- It will position Cappadocia not just as a natural wonder but as a **universal cultural heritage center**.

This project is not merely a tourism investment, but a **strategic culture and faith heritage move** that carries Cappadocia's historical identity into the future.

PROPOSAL-3: PAŞABAĞLARI EVENT AREA & OPEN-AIR GRAPE MUSEUM

This project, developed by KAPYAD and donated to the Cappadocia Area Directorate, aims to transform Paşabağları from an archaeological site visited only during the day into an international **event/festival center**.

1. Current Situation

- There are currently no prepared/dedicated areas in Cappadocia for international-standard open-air organizations such as concerts.
- The inability to hold such events impairs the destination in terms of experience, limiting the visitor experience to one-time physical activities such as balloons, horses, and safaris.
- Unique and signature events that will encourage repeat visits from high-income domestic and international guests, offering different cultural/sensory experiences in a magical atmosphere within Cappadocia's historical and natural texture, are missing.

2. Proposal

PAŞABAĞLARI EVENT AREA & OPEN-AIR GRAPE MUSEUM

- **Event Area:** An open-air area overlooking the fairy chimneys, in harmony with the natural landscape; to host concerts/performances by international artists; and to include world-class festivals in the calendar.
- **Open-Air Grape Museum:** Transformation of idle vineyards into an education & experience area exhibiting local grape varieties; an interactive narration of the region's ancient viticulture culture.
- **Infrastructure Arrangements:** Improvements to roads and signage; modern sustainable toilet areas, and controlled visitor flow within the scope of a master plan.
- **Quick Implementation Opportunity:** The project does not require enclosed buildings or major construction; it can be implemented with only landscaping and arrangement work while preserving the natural texture.

3. Expected Results

- It will attract up to **200,000 additional annual visitors** to Cappadocia.
- It will increase the region's length of stay and tourism revenues by **8-10%**.
- It will transform Cappadocia into a destination known for **international culture and art events**.
- It will turn idle agricultural areas into **a living open-air museum**.
- It will create **a sustainable tourism model** by preserving the natural landscape.
- It will be a very strong motivation for **repeat visits to Cappadocia by the upper-income group in domestic tourism**.

This project will play a key role in increasing Cappadocia's length of stay and gaining international prestige as a low-cost yet high-impact cultural investment.

PROPOSAL-4: STRENGTHENING TOURISM WITH AEGEAN & MEDITERRANEAN DIRECT FLIGHTS

1. Current Situation

- **Transportation Barrier:** While Nevşehir (NAV) and Kayseri Erkilet (ASR) airports are the main airports serving the region, Cappadocia tourism is largely shaped by **flights connecting through Istanbul**.

Despite the tourist profile visiting Cappadocia, especially during the April - October period, being predominantly high-income, there are no direct flights or a regular and predictable flight schedule between Cappadocia and Turkey's other luxury tourism centres, such as Bodrum, Göcek, Izmir, and Antalya.

- **Time Loss Due to Transfer:** A one-day loss occurs due to the Istanbul transfer, which can lead to Cappadocia being excluded from 3–4-day travel itineraries. Ease of travel is essential for the luxury segment.
- **Lack of Airport Capacity Utilization:** Due to flights solely originating from and arriving at Istanbul, the potential of Nevşehir (NAV) and Kayseri (ASR) airports is not fully utilized during the tourism season.

2. Proposal

To increase Cappadocia's quality tourism potential and raise the length of stay, it is proposed to launch **direct flights** from **Nevşehir (NAV) or Kayseri (ASR) airports** to critical tourism points in the Aegean and Mediterranean regions during the April - October period.

Target Routes:

1. Cappadocia - Bodrum (BJV)
2. Cappadocia - Dalaman / Göcek (DLM)
3. Cappadocia - Izmir (ADB)
4. Cappadocia - Antalya (AYT)

A pilot application should be carried out with **1 daily flight, 7 flights a week** during the April - October period.

Flight frequency can be increased in subsequent seasons based on capacity utilization. It is extremely important that all flights launched are structured as at least 1 flight per day, every day of the week, announced at least 2 months in advance, provide long-term reservation opportunities, be sustainable and continuous, and that this sustainable impression is accurately conveyed to travel agencies and potential buyers.

3. Expected Results

- It will bring **250,000 additional tourists** to Cappadocia annually.
- It will increase **the region's length of stay and revenue by 10-15%**.

- It will facilitate the access of the luxury tourist segment to Cappadocia.
- It will free Cappadocia from dependence on the Istanbul transfer, making it a center for **multi-destination tourism**.
- It will strengthen Turkey's tourism chain, contributing to its international brand value.

PROPOSAL-5: CAPPADOCIA VALLEYS TREKKING DESTINATION PROJECT

1. Current Situation

Cappadocia is a unique geography in the world with its valleys featuring unique natural formations. Currently, tourists have limited walking (trekking) opportunities in the valleys. However, this experience cannot reach its full potential due to **infrastructure deficiencies**.

- **Infrastructure Deficiencies:** Unmaintained roads, inadequate directional signage, and lack of portable WCs.
- **Lack of Night Use:** The valleys can only be used during the day due to the lack of lighting.
- **Security Issues:** Tourists face risks of getting lost or injured during individual walks, and the effectiveness of security forces remains limited.
- **Limited Marketing:** Cappadocia valleys are not sufficiently visible on world trekking maps, and the work of the TGA on this subject is extremely insufficient.
- **Lack of Distribution:** Tourist flow is concentrated in Göreme and the central valleys, while areas such as Soğanlı, Mustafapaşa, and İbrahimpaşa are not sufficiently utilized.

2. Proposal

CAPPADOCIA TREKKING NETWORK

It is proposed to establish a trekking network with modern infrastructure and a sustainable management model to turn Cappadocia's valleys into a **world-class trekking destination**.

- **Trekking Paths and Marking**
 - Regulation of the valleys centered around Göreme – Uçhisar – Çavuşin.
 - Extension of the routes to lesser-known areas such as Soğanlı, Mustafapaşa, and İbrahimpaşa.
 - Integration of international standard signboards, maps, and mobile application.
- **Night Trekking Opportunity**
 - Installation of nature-friendly LED lighting systems in selected valleys.
 - Increasing night trekking and "Cappadocia by Moonlight" themed events.
- **Security and Mounted Gendarmerie Units**
 - Ensuring security with mounted gendarmerie teams patrolling the valleys regularly.
 - Positioning this application as a brand element that emphasizes Cappadocia's identity as the "Land of Beautiful Horses."
- **Portable WC and Rest Points**
 - Placement of portable and eco-friendly WC units at strategic points.
 - Rest areas with shade and water – beverage supply points.

- **Digital Marketing and Mapping Systems**

- Promotion of Cappadocia routes on international trekking platforms.
- GPS-tracked trekking experience via mobile application.
- Contacting internationally known sports equipment brands such as Technogym, Voit, and Matrix to add Cappadocia valleys to the virtual experiences on the screens of their walking, treadmill, and cycling equipment. It is important for TGA (Turkish Tourism Promotion and Development Agency) to conduct studies on this matter.

Important Note: All improvements made regarding trekking will also pave the way for Cappadocia to become a world-class cycling destination.

3. Expected Results

The Cappadocia Trekking Destination Project is anticipated to yield the following outcomes:

- It will transform Cappadocia into one of the world's most popular trekking centers,
- It will attract an additional **150,000 to 200,000 tourists** annually,
- It will increase the region's average length of stay,
- It will generate approximately **€30 million in additional annual revenue**,
- It will ensure the preservation of the valleys through sustainable tourism,
- It will convert Cappadocia into a multi-dimensional nature tourism brand beyond balloon tourism.

This project represents a **low-cost, yet high-impact strategic initiative**, utilizing infrastructure and marketing investments.

PROPOSAL-6: PRIORITIZATION OF CULTURAL INVESTMENTS IN CAPPADOCIA'S INCENTIVE SYSTEM

1. Current Situation

- **Cultural Infrastructure Deficit:** Despite Kapadokya possessing a unique natural and cultural heritage on the world tourism stage, the region is inadequate in terms of modern museums and cultural infrastructure.
- **Limited Museum Offerings:** Göreme Open Air Museum is the only prominent site in the region; there are no thematic or world-class private museums that would generate significant global attention.
- **Global Precedents:** Many destinations worldwide ensure the sustainability of their tourism revenues solely through their museums:
 - **Bilbao (Spain):** The Guggenheim Museum increased the city's brand value fivefold in 10 years.
 - **Florence (Italy):** Attracts millions of visitors annually with the Uffizi Gallery.
 - **Louvre Lens (France):** Revitalized the city's economy through a modern museum model.
- **Incentive Imbalance:** The current investment incentive system heavily favors hotel investments and fails to make cultural investments attractive.
- **Tourism Monotony:** Tourist experiences are limited to nature and accommodation, leading to a low length of stay.
- **Increase in Small, Unqualified Hotels:** Small facilities constructed with TKDK (Rural Development) support are damaging Cappadocia's luxury and authentic brand value.
- **Private Sector Reluctance:** Due to high costs, insufficient incentives, and the perception of low returns, the private sector is avoiding cultural investments.

2. Proposal

PRIORITY INCENTIVE MODEL FOR CULTURAL INVESTMENTS

It is proposed to reorganize the investment incentive system to facilitate the implementation of modern museums, cultural centers, and thematic experience areas in Cappadocia.

- **Inclusion of Cultural Investments in the Priority Incentive Category**
 - Nevşehir and the Cappadocia region should be defined as a "priority investment region" for cultural investments.
 - Strong incentive mechanisms should be created, such as tax reductions, Treasury land allocation, investment credits, and social security premium support.
 - VAT exemption and low-interest, long-term credit should be provided for cultural investments.

- **Redirection of TKDK Supports**
 - Small hotel supports provided via TKDK (Rural Development) in the name of rural development should only be applied to the abandoned villages of Cappadocia that remain outside tourism, and to the villages designated as Eco-Tourism areas in the Upper-Scale Plan prepared by the Cappadocia Area Directorate.
 - TKDK incentives should be restructured to also support private cultural investment projects.
- **Public-Private Sector Cooperation**
 - Models where the public and private sectors co-invest should be developed for large cultural projects.
 - International brand support can be secured through sponsorship and naming rights agreements.

3. Expected Results

By prioritizing cultural investments in the investment incentive system:

- It will bring up to **150.000 additional visitors** annually to Cappadocia.
- It will increase the region's length of stay.
- It will provide an annual foreign exchange income exceeding **€30 million**.
- It will elevate tourism quality by preventing investments in small hotels lacking brand value.
- In the long term, it will transform Cappadocia into **one of the world's strongest cultural tourism destinations**.

This strategy will establish a sustainable tourism model by grounding Cappadocia's future not only in nature tourism but also in world-class cultural investments.

PROPOSAL-7: CAPPADOCIA CULTURAL ROUTE (ROUTE OF CIVILIZATIONS) AND INTEGRATION OF ARCHAEOLOGICAL SITES INTO TOURISM

1. Current Situation

The Cappadocia Cultural Route project (kapadokyakulturyolu.com.tr), carried out by KAPHİB (Cappadocia Infrastructure Service Union), is a comprehensive initiative connecting historical/cultural values. The existing Roman – Seljuk – Ottoman cultural heritage in Cappadocia is being structured together. The purpose of this Project is to turn the route, once known as the sacred pilgrimage road, into a walking route that meets international standards. The route encompasses Şahinefendi, Taşkınpaşa, Cemil, Mustafapaşa, Ortahisar, Göreme, Çavuşin, Ürgüp, İbrahimpaşa, and Avanos.

- Two Critical Archaeological Sites:
 - **Sobesos Ancient City (Şahinefendi):** Excavations, which KAPYAD has emphasized for years, have recommenced. New discoveries at Sobesos, which previously uncovered mosaics, bath structures, and episcopal findings valuable for Early Christianity, are extremely important for Cappadocia.
 - **Golgoli Mountain (Mount of the Virgin Mary):** Recent studies indicate that the area is a significant religious center; the potential for integrating ancient churches and sacred sites into tourism is very high.
- Seljuk Period Artifacts:
 - **Taşkınpaşa:** The madrasah, mosque, and tomb (kümbet) in the village are among the most beautiful legacies of the Seljuk period and are undervalued assets in Cappadocia's tourism structure.

KAPYAD **fully supports this vision** and emphasizes that the project should transform into a **regional development & tourism strategy**. However:

- **Lack of Coordination:** There is insufficient coordination among the TGA, KAPHİB, and the Area Directorate.
- **Slow Pace of Excavations:** Strategic excavation sites like Sobesos and Gölğözü are progressing slowly due to a lack of funding and coordination.
- **Brand Confusion:** The name "Cultural Route" risks confusion with the festival chain organized by the TGA in different cities.
- **Underutilized Potential:** Due to the lack of integration of excavation sites into tourism, their impact on the length of stay and tourist diversity remains insufficient.
- **Insufficient Promotion:** The visibility of these efforts at the national and international level is negligible.

2. Proposal

ROUTE OF CIVILIZATIONS AND INTEGRATION OF ARCHAEOLOGICAL SITES INTO TOURISM

It is proposed to **expand the Cultural Route project and brand** it as a strategic asset to integrate Cappadocia's archaeological heritage into world tourism.

1. Rebranding the Cultural Route as the "Route of Civilizations"

- A name change is proposed to avoid confusion with TGA festivals.
- "Route of Civilizations" reflects Cappadocia's millennia-old multicultural structure.
- It can be used as a strong brand in local, national, and international promotion.

2. Acceleration of Sobesos Ancient City Excavations

- It is extremely important to increase the excavation budget and expand with additional scientific teams.
- Establishing temporary visitor areas to exhibit the unearthed artifacts is important.
- Positioning Sobesos as **a strategic center in Early Christian tourism** will increase our marketing power.

3. Golgoli Mountain (Mount of the Virgin Mary) Archaeological Site

- Uncovering sacred churches and religious centers is important. In this sense, accelerating restoration works and allocating more budget to this valuable area are crucial.
- Visitor routes and infrastructure planning are required.
- Integration with the St. George and Early Christian tourism can be provided.

4. Tourism Integration

- It is possible to market the **Sobesos – Golgoli – Soğanlı Valley – Mustafapaşa** line as a single "Route of Civilizations."
- It has the potential to become a major attraction with modern directional signs, walking paths, and digital guidance systems.
- Events and experiences can be designed to increase the length of stay for tourists visiting the region.

3. Expected Results

The implementation of the Sobesos, Golgoli, and Route of Civilizations projects:

- Will bring up to **200,000 additional visitors** to Cappadocia.
- Will increase the region's length of stay by **8-10%**.
- Will provide an annual foreign exchange income of **€40 million**.
- Will transform the region into a center for **archaeological and cultural heritage tourism**, not just nature tourism.

This project will be **one of the most important cultural strategies** for the sustainable development of Cappadocia.