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Survival Strategies of Local Small and Medium Tourism Enterprises (SMTEs) In Covid-19 Pandemic in Heritage Tourism Sites in Turkey

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Abstract: Covid-19 pandemic has been a multi-dimensional challenge for tourism industry globally for more than 15 months now, but even so, there is a lack of information about the impacts of pandemic on different destinations and tourism enterprises. To contribute to the scientific endeavors to understand, explain, and explore the impacts of this disease on tourism, this research investigates the impacts of the pandemic on local small and medium tourism enterprises (SMTEs) in Cappadocia Region, a globally well-known Heritage Tourism destination in Turkey, and their survival strategies. Primary data was collected through structured interviews conducted with 97 respondents from two participant groups including respondents from small and medium accommodation facilities and tourism enterprises including auxiliary tourism services. We found that heritage tourism destinations and SMTEs located in these destinations seem to be much vulnerable to the impacts of Covid-19 owing to destination characteristics. Findings show that great majority of the SMTEs has established solidarity based new business relations for survival but they also have spent their resources for future growth and investment which seem to jeopardize the recovery efforts.

Keywords: Covid-19 Pandemic; SMTEs; Impacts of Pandemics on SMTEs; Heritage Tourism; Cappadocia Region; Turkey.

Estrategias de supervivencia de las pequeñas y medianas empresas turísticas locales (SMTE) en la pandemia Covid-19 en los sitios de turismo patrimonial en Turquía

Resumen: La pandemia de Covid-19 ha representado un desafío multidimensional para la industria turística a nivel mundial durante más de 15 meses, sin embargo, existe una falta de información sobre los impactos de la pandemia en diferentes destinos y empresas turísticas. Con el fin de contribuir a los esfuerzos científicos para comprender, explicar y explorar los efectos de esta enfermedad en el turismo, esta investigación examina los impactos de la pandemia en las pequeñas y medianas empresas turísticas (SMTEs, por sus siglas en inglés) locales en la región de Capadocia, un destino de turismo patrimonial reconocido a nivel mundial en Turquía, y sus estrategias de supervivencia. Se recopilaron datos primarios a través de entrevistas estructuradas realizadas a 97 participantes de dos grupos, que incluyen entrevistados de pequeñas y medianas instalaciones de alojamiento y empresas turísticas, incluidos servicios turísticos auxiliares. Descubrimos que los destinos turísticos patrimoniales y las SMTEs ubicadas en estos destinos parecen ser mucho más vulnerables a los impactos de la Covid-19 debido a las características del destino. Los hallazgos muestran que la gran mayoría de las SMTEs han establecido nuevas relaciones comerciales basadas en la solidaridad para la supervivencia, pero también han destinado recursos para el crecimiento y la inversión futura, lo que parece poner en peligro los esfuerzos de recuperación.

Palabras clave: Pandemia de Covid-19; SMTEs; Impactos de las pandemias en las SMTEs; Turismo patrimonial; Región de Capadocia; Turquía.

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1. Introduction

Probably no one would have believed in the last days of December, 2019 that the global tourism industry would be suffered such deeply from an outbreak of a novel coronavirus in China. Beginning from the second week of January, 2020, strict preventive measures, such as settlement quarantines and temporary closures of businesses and many of the public services were being witnessed in Chinese cities, but the outbreak has soon become a global public health crisis. The World Health Organization (WHO) declared it as a global pandemic in mid-March, 2020, but no one could have dreamed that the epicenter could have changed such rapidly from China to other places. As of the second half of March, 2020, many countries worldwide have begun to impose strict travel limitations. The reservation cancellations, especially in the first quarter of the year, were totally unprecedented to have happened before. Globally, every tourism destination and almost all of the tourism enterprises have begun to suffer from mobility restrictions, but the impacts of the pandemic on heritage tourism destinations and on small and medium tourism enterprises (SMTEs) have not studied deeply yet.

Some studies considered the possible consequences and impacts of infectious diseases, and many recent ones focused directly on Covid-19 impacts on tourism industry. Chen et al. (2021), for instance, underline that there is a lack of research interest on the issue before the pandemic. According to many, tourism appears to be one of the most vulnerable sectors to the impacts of diseases (Yang et al., 2020; Chen et al., 2021), and a multiplicity of reasons affects tourism industry in various ways. For instance, travel behavior of many tourists seems to be fragile and easily be influenced by conventional and social media platforms, local and national government decisions, and moreover, different tourist groups have different perceptions about the risks of diseases. (Chen et al., 2021). Unbearable impacts of diseases, especially on regional development efforts, are much greater when those efforts' dependence on tourism is higher as Yang and Chen (2009) indicate. Therefore, while tourism appears to be one of the most vulnerable sectors to diseases, the vulnerability of regional development efforts of destinations varies from one another owing mostly to varying economic dependency of them on tourism, on the one hand, and to their local destination characteristics on the other. Thus, the impacts of Covid-19 on tourism in different destinations may be different as well, and the recovery periods of the local development trajectories of those different destinations seem to require destination-specific strategies.

Moreover, the impacts of Covid-19 pandemic on tourism industry have studied from a multiplicity of research questions. While some studies intensified on the impacts of the disease on tourism industry in general (such as Brouder et al. 2020; Gössling et al., 2021; Jones and Comfort, 2020; Prideaux et al. 2020; Sigala, 2020), some others investigated how national tourism industries were influenced by Covid-19 (such as Foo et al. 2020; Hamid, 2020; Kaushal and Srivastava, 2021; Qiu et al. 2020; Uğur and Akbıyık, 2020). In addition, there are studies which explore tourist behaviours during the pandemic (Kock et al. 2020; Wachyuni, and Kusumaningrum, 2020).

However, there is an obvious lack of research in the literature which investigates the impacts of the pandemic on particular tourism destinations, and especially on various SMTEs. To contribute to the scientific endeavors to understand, explain, and explore the effects of this disease on tourism, this research investigates the impacts of the pandemic on local SMTEs in Cappadocia Region which is a globally well-known Heritage Tourism destination in Turkey, and their survival strategies. The methods employed in the study include secondary data and structured interviews that were conducted with participants including owners / managers of local small and medium accommodation facilities and other tourism services. Secondary data include official statistical data of the number of arrivals, the average length of stay, and the occupancy rates of accommodation facilities based on domestic, foreign, and total number of visitors of the Cappadocia Region for the period between 2002 – 2022, and correlation analysis in order to provide the tourist mobility based main quantitative destination characteristics of the region. Structured interviews, on the other hand, conducted with 97 participants, and focused on the challenges that SMTEs face during this period, their efforts to adopt precautions, their strategies of survival so far, and their near future expectations and predictions about recovery and their businesses.

2. A Brief Insight into The Impacts of Covid-19 on Tourism

2.1. Global Impacts in General

In the first weeks of the outbreak on January 2020, many governments have already begun to consider travel restrictions from abroad as a preliminary precaution against possible spread of the disease. This worldwide tendency gave clear enough clues about coming challenges that tourism industry would face globally, but the main breaking point for the sector, before the declaration of pandemic by WHO, seems to have been the Diamond Princess cruise ship quarantine on February, 3, when the cruiser docked off at Yokohama Port in Japan. Nakazawa et al. (2020) give a detailed insight about the quarantine process of the ship, which shocked the global society, with subsequently risen ethical considerations. Until February 22, in an 18-day-long period, global society has witnessed one of the strictest quarantines of contemporary times which shed a haunted light on possible consequences of a worse-case scenario for tourism industry.

The spread of the virus continued, and 146 countries confirmed positive cases (Gössling et al., 2021) by the time the Covid-19 has been declared as a pandemic by WHO on March, 12 (WHO, n.d.(a)). Global spread of the disease was closely linked to international travels (Chen et al., 2021; Gössling et al., 2021; Sigala, 2020), large gatherings (Anderson et al. 2020; CDC, n.d.; WHO, n.d.(b)), and tourism (Nakazawa et al., 2020; Mallapaty, 2020; Gössling et al., 2021). Even before the declaration of the pandemic, WHO suggested further measures beyond travel bans such as other forms of mobility restrictions, social distancing and population-level behavioral changes in its Situation Report no:30 on February, 19 (WHO, n.d.(b)).

The United Nations World Tourism Organization (UNWTO) (2020) estimated that tourism industry worldwide would intensively be affected by the global restrictions, and the pandemic would put all the related sectors and jobs at risk. In fact, on March, 17 the Union of European Football Associations (UEFA) (2020) postponed Euro 2020 Cup, and on March, 24 another cancellation decision was released by the International Olympic Committee (2020) for Tokyo 2020 Olympics. Only two weeks after the declaration of the pandemic, a background document prepared for the European Parliament summarized the early impacts of Covid-19 on tourism in Europe which underlined that the sector was estimated to be losing around €1 billion monthly in Europe and stated that the situation would be particularly difficult for the local economies whose dependence on tourism is relatively higher (Niestadt, 2020). Total number of travelers dropped dramatically whose impacts have simultaneously become apparent especially on transportation and hotel businesses worldwide (Foo et al., 2020). Even the loosening decisions in the summer times did not help many jobs to survive in the sector, and especially in Europe, loosening restrictions seem to have caused a “second wave” which indispensably required further restrictions. Many governments decided to tighten the restrictions again gradually between September and December.

In this period, many studies emphasized those impacts. While some studies intensified on the impacts of the disease on tourism industry in general (such as Brouder et al. 2020; Gössling et al., 2021; Jones and Comfort, 2020; Prideaux et al. 2020; Sigala, 2020), some others investigated how national tourism industries were influenced by Covid-19 (such as Foo et al. 2020; Hamid, 2020; Kaushal and Srivastava, 2021; Qiu et al. 2020; Uğur and Akbıyık, 2020). In addition, there are studies which explore tourist behaviors during the pandemic (Kock et al. 2020; Wachyuni, and Kusumaningrum, 2020). However, the impacts of the pandemic on particular destinations and on different tourism enterprises have not researched deeply yet.

2.2. Covid-19 Impacts on Tourism in Turkey

According to the Association of Turkish Travel Agencies (TURSAB), annual share of tourism industry in national GDP was 4.6% in 2019 in Turkey (TURSAB, 2020a). Moreover, national tourism income corresponds to 20.1% of annual total export amounts nationally (TURSAB, 2020b), and the total number of foreign visitors was approximately 45 million in 2019 (TURSAB, 2020c). However, 2020 was a disastrous year for national tourism industry. While the annual total tourism income was $34.5 billion in 2019, this amount has dramatically dropped to approximately $8.2 billion in the first 9 months of 2020 (TURSAB, 2020a). According to the Ministry of Culture and Tourism of the Republic of Turkey (KTB), total amount of visitors dropped 71.3% in the first 9 months of 2020 in comparison with the same period in 2019 (KTB, 2020a).

Since the first week of January 2020, government authorities in Turkey have begun to prepare certain precautions. First national limitations have gone through on January 22, and the commercial flights between Wuhan and Istanbul have cancelled. On February, 5, all flights between China and Turkey were cancelled, and territorial borders with Iran was closed. As of mid-March, all the flights between Italy, South Korea, Iraq, Russian Federation, and Ukraine were cancelled. First travel restrictions by mid-March represents the loss of half of the foreign visitors. On March, 11, season opening for tourism facilities was officially delayed until the end of April, and on March, 15, the KTB released a circular on Covid-19 exceptions about reservation cancelation penalties for tourism facilities (KTB, 2020b). On March 17, the number of countries in which the international flights were cancelled was increased to 20. In the second half of March, except the ones for basic needs of the society, functions of most of the open-to-public facilities and services were restricted. On March 21, the government has imposed curfews for elderly population (MoI, 2020a).

On March 28, intercity mass transportation services were limited with half-capacity and intercity travel by mass transportation has begun to require travel permits from governorships of the provinces. (MoI, 2020b). On April, 3, a new Circular on Intercity entrance and exit restrictions and age restrictions in the Greater Municipalities and the Province of Zonguldak was released, and all the domestic flights were cancelled (MoI, 2020c). In the second week of April, a new circular was released which imposed weekend curfews in the Greater Municipalities in Turkey. All the citizens living in these provinces were restricted to go out from their homes by weekend curfews.

The functions of accommodation facilities, restaurants, diners, cafes etc. were also restricted, and the domestic tourism mobilities including excursions were almost stopped. But, on May, 12, travel restrictions were ended in 9 of the provinces and the KTB declared a new circular which allowed accommodation facilities to re-open for guests under certain hygiene and social distance measures (KTB, 2020c). On May, 20, all the services of food and beverage facilities were allowed to function in accordance with Covid-19 measures (KTB, 2020d). With these two circulars, tourism facilities nationwide have begun to re-open.

In the first six months of 2019, the number of foreign visitors was 19.4 million (TURKSTAT, 2020), which dropped to 5.6 million in 2020 (TURKSTAT, 2021). In the second quarter of 2020, no foreign visitor has entered from the borders, nor the domestic tourists were allowed to visit destinations. But on June, 2, further loosening of restrictions in tourism facilities were announced and some of the closed functions of accommodation facilities such as baths, saunas and massage services were re-opened (KTB, 2020e). On June, 5, re-opening rules of sea tourism facilities and vehicles were declared by the ministry (KTB, 2020f). With those circulars, domestic tourism mobilities have started again, however, foreign tourist arrivals were restricted until June, 11 when the MoI announced a new circular on the end of entrance restrictions from abroad (MoI, 2020d).

Tourism activities and functions have continued to re-open under certain measures, and on June, 23, the KTB announced a new circular and all components of tourism industry have re-opened, foreign and domestic tourism mobilities have started (KTB, 2020g). This start, however, seems to have been slower than anticipated. Even though Turkey has ended travel restrictions from abroad on June, 11, some of the countries continued their restriction decisions to Turkey. In order to accelerate this slow season opening, the KTB released another circular on new arrangements about Covid-19 measures in accommodation facilities and on “Safe Tourism Certificate” for tourism facilities on July, 1 (KTB, 2020h; 2020i).

With the help of those new arrangements, tourism mobility was accelerated. But even so, the number of tourists dropped 74.1% in the third quarter of 2020 in comparison with the same period in 2019 (TURKSTAT, 2021). In July and August, especially summer tourism destinations partially enjoyed re-opening of the season. But, as of August, 25, owing to the increasing number of cases, new restrictions have begun to be announced again, which were even more tightened, and on November, 4, food and beverage facilities were closed to guests and they were allowed only to operate their take-away services (MoI, 2020e). However, the restaurant and diners of accommodation facilities were excluded as long as they serve to their own guests (MoI, 2020f). In the last quarter of 2020, Turkey has lost 57.7% of visitors and 50.4% tourism income. During the summer times, thanks to loosened restrictions, especially summer tourism destinations seem to have recovered to a degree, but the impacts of Covid-19 seem to have been much worse in many other destinations.

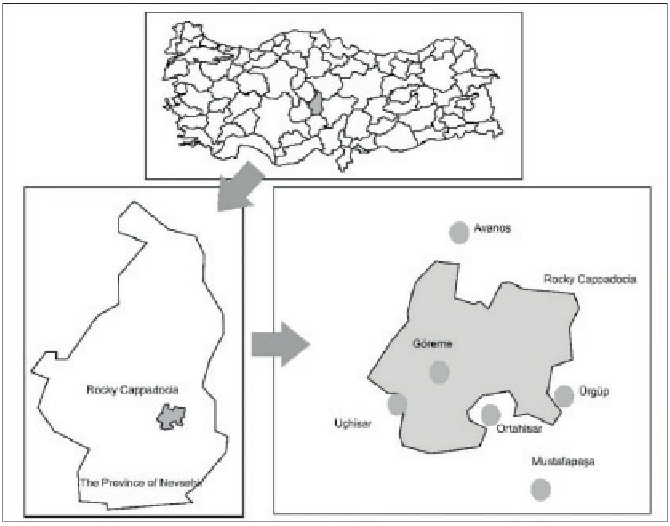
3. Methods and Data Sources

This study adopts multi-methods to answer its research questions. The methods employed in the study include secondary data and structured interviews conducted with key informants. Secondary data include the quantitative data of the number of arrivals, average length of stay and occupancy rate data on temporal basis obtained from the official database of the Ministry of Culture of Tourism of the Republic of Türkiye. Secondary data is used to indicate the tourist mobility based main quantitative destination characteristics of the case study area, which is Cappadocia Region. To anticipate the direction, first, temporal correlations between 2002 and 2022 are analyzed in order to indicate the annual change tendencies of the number of arrivals, average length of stay and occupancy rate data of the region. In the second place, to construct a deeper understanding about the destination characteristics of the region, correlations between the number of arrivals, average length of stay and occupancy rate are also analyzed. Significance of both the temporal correlations and the correlations between these variables are also checked based on t scores. The findings of the correlation analyses provide the research with a significant framework about the tourist mobility based quantitative characteristics of the destination both in terms of foreign and domestic tourist mobilities.

Göreme National Park and the Rock Sites of Cappadocia, located in Cappadocia Region and registered in the World Heritage List of the United Nations (UN) in 1985, is one of the globally well-known heritage tourism destinations of Turkey. Cappadocia Region is located within the borders of the Province of Nevşehir. In Turkey, there are 81 Provinces which are also classified as NUTS (from the French version Nomenclature des Unités Territoriales Statistiques) Level III Regions, and there are 922 Districts which are also classified as NUTS Level IV Local Administrative Units (LAUs). The Province of Nevşehir is one of those 81 Provinces of Turkey, and is constituted of 8 Districts or NUTS Level IV LAUs.

Göreme National Park and the Rock Sites of Cappadocia is located within the borders of three Districts of the Province including the Central District and the Districts of Avanos and Ürgüp. Tourism activities, facilities and services of Rocky Cappadocia are mostly intensified in those districts. Owing to the fact, while secondary data conveys the quantitative data of the number of arrivals, average length of stay and occupancy rate data of these three LAUs, primary data of this research was also obtained from participants located in 6 settlements of those three districts including Göreme and Uçhisar settlements from the Central District, Avanos settlement from the District of Avanos, and Ürgüp, Ortahisar and Mustafapaşa settlements from the District of Ürgüp as shown in Figure 1.

Figure 1: Location of the case study settlements in Cappadocia Region in the Province of Nevşehir in Turkey.



Primary data was obtained through structured interviews from two participant groups who were selected by using purposive sampling technique. In order to fully and directly focus on the research question which concerns the survival strategies of locally owned SMTEs in the region, we used purposive sampling method to form the sampling of the research and thus to reach out the main sources of information. In purposive sampling, Schutt (2006) identifies that "*the selection process involves identifying themes, concepts and indicators through observation and reflection*" (p. 348). Three identifying themes were defined for the purposive sampling including (a) being an owner / manager of SMTEs located in the case study settlements; (b) being active in business at least for five years, and; (c) living continuously in the settlement while the business is actively working. None of the tourism businesses were excluded from the sampling statistically, we questioned every single tourism business in the case study area during the survey analyses first if they fit into the three identifying themes and second if they consent to participate into the study. While both forming the sampling groups of the research and obtaining the data from the participants, we closely follow the ethical guides released by the Economic and Social Research Council in the following website “https://www.ukri.org/councils/esrc/guidance-for-applicants/research-ethics-guidance/”.

Therefore, the sampling of the research is constituted of all the SMTEs in the case study area who fit into the three identifying themes defined above and who voluntarily consent to respond to the interviews. Two participant groups were distinguished from one another during the field research. The first participant group was constituted of the local owners / managers of small and medium accommodation facilities, the second group was constituted of the local owners / managers of other small and medium tourism enterprises including auxiliary tourism services, gift shops, and artisan workshops. Data was collected from a total number of 97 participants as shown in Table 1.

Table 1: The number of participants from the settlements and by the participant groups

Districts	Settlements	Accommodation Facilities (Group 1)	Other Tourism Enterprises (Group 2)	Total
Central District	Göreme	9	14	23
	Uchisar	3	7	10
District of Avanos	Avanos	8	16	24
District of Ürgüp	Ürgüp	12	12	24
	Ortahisar	2	8	10
	Mustafapaşa	1	5	6
Total		35	62	97

Structured interviews were started to be conducted with participants in October, 10, 2020 right after the usual peak times of the region, and indispensably ended in December, 01, 2020 after the Ministry of Interior’s (MoI) circular on new restrictions and precautions concerning curfews on weekday nights and weekend times. All the interviews were conducted by the authors, completed in accordance with social distance and mask wearing rules of Covid-19 times, and lasted at least 25 minutes and at most 70 minutes. Since audio or video recording were not accepted by the participants, all the interviews were written down by the conductors. We analyzed the responses of the participants through a simple content analysis by forming a simple classification scale by distinguishing between the varying responses from similar ones. Identified responses were classified into different titles and the number of responses were represented by the frequencies of the respondents. The identified titles are shown in classification tables with the respondent frequencies in the findings section.

Structured interviews were constituted of five basic variables. First one focused on the challenges that the businesses have been facing during the pandemic times. We asked the participants to list and shortly explain the newly emerged problems in relation to the pandemics. Some of the participants provided fairly detailed explanations by comparing the new problems with the past Influenza outbreak times. Second investigated the reactions of the participants to those challenges including their individual and business strategies to solve them and to survive the business. Under this variable, we asked the participants about how they react to the problems they listed under the first variable. Third variable explored the pandemic related precautions that the businesses have been implementing, and the influences of those precautions on their businesses. Under this variable we asked the participants to the extent which they were able to implement the officially released precautions for the tourism facilities, and if they implement any other further measures. Fourth variable was constituted of two pieces and it was business specific. For the first participant group representing the accommodation facilities, these two pieces investigated, in turn, the changes of guest profiles and the average length of stay of the guests. In this part we asked the participants if the guest profile and their visiting tendencies have changed or not. For the second participant group representing other tourism enterprises including the auxiliary tourism facilities, these two pieces explored, in turn, the changes of usual customer profiles and any changes about their usual ways of providing services or production. And the final variable gave the participants the opportunity to add any other experiences and statements.

4. Findings and Discussions

4.1. General Findings: Impacts of Covid-19 on Tourism in Cappadocia Region

After the opening of Göreme Open Air Museum in 1967, tourism has gradually become the dominant economic sector in Cappadocia Region, and this globally well-known heritage tourism destination has certain characteristics which seem to make the region more vulnerable to the impacts of Covid-19. Tourism based economic development in the region has always been depended on the number of visitors. This dependency seems to be a consequence of tourists' tendency to stay shorter in the region. In 2022, the average length of stay was 2.06 while it was 1.76 in 2002 (KTB, 2002; 2022). Total number of tourists, who stayed in accommodation facilities at least one night, was nearly tripled in the same period but the average length of stay has remained almost the same as shown in Table 2.

Table 2: Number of arrivals, average length of stay and occupancy rate changes in the Province of Nevşehir between 2002 and 2022.

	Number of Arrivals			Average Length of Stay			Occupancy Rate		
Years	Foreign	Domestic	Total	Foreign	Domestic	Total	Foreign	Domestic	Total
2002	390,262	345,008	735,270	1.96	1.54	1.76	21.51	14.96	36.47
2003	234,921	334,575	569,496	1.87	1.51	1.66	13.01	15.00	28.00
2004	287,104	221,033	508,137	1.93	1.71	1.83	16.57	11.29	27.86
2005	385,924	206,470	592,394	1.92	1.47	1.76	23.65	9.69	33.34
2008	522,744	287,300	810,044	1.81	1.31	1.63	19.30	7.70	27.00
2009	668,791	608,909	1,277,700	1.78	1.41	1.61	16.56	11.95	28.51
2010	1,223,880	648,897	1,872,777	1.53	1.37	1.47	26.88	12.73	39.61
2011	796,110	495,305	1,291,415	1.96	1.79	1.89	21.40	12.15	33.55
2012	686,936	511,731	1,198,667	2.07	1.68	1.91	18.70	11.31	30.01
2013	729,088	593,468	1,322,556	2.07	1.68	1.90	21.89	14.41	36.30
2014	1,002,094	655,295	1,657,389	1.89	1.93	1.90	28.01	18.80	46.82
2015	656,888	787,835	1,444,723	1.91	1.71	1.80	18.80	20.12	38.92
2016	267,074	687,992	955,066	1.88	1.76	1.79	7.92	19.10	27.03
2017	422,847	969,886	1,392,733	1.67	1.91	1.83	9.47	24.82	34.30
2018	872,336	903,847	1,776,183	1.73	1.84	1.79	19.94	21.97	41.91
2019	1,214,805	836,745	2,051,550	1.84	1.85	1.84	27.79	19.30	47.09
2020	176.013	444.210	620.223	1,87	1,98	1,95	3,79	10,09	13,88
2021	359.714	882.157	1.241.871	2,07	2,08	2,08	8,51	20,98	29,48
2022	749.596	835.066	1.584.662	2,06	2,02	2,04	18,66	20,39	39,05

Source: Arranged by the authors from 2002 - 2022 tourism accommodation statistics of KTB

Neither the average length of stay, nor the occupancy rates in the region have increased considerably between 2002 and 2022. We also calculated correlation (r) and explained variation (r^2) values, and "t" scores between years and these variables. As shown in Table 3 below, temporal correlation and explained variation values of average length of stay variable are statistically "not significant". Therefore, the slight increase of the average length of stay variable between 2002 and 2022 does not statistically represent a significant increase of the variable. Owing to the fact, it is possible to identify that the average length of stay characteristics of the destination remains almost the same in 2-decade long period.

Table 3: Temporal Change Correlation (r), Explained Variation (r2) Values and "t" Scores for number of arrivals, average length of stay and occupancy rate variables between 2002 - 2022

	Number of Arrivals			Average Length of Stay			Occupancy Rate		
	r	r2	t	r	r2	t	r	r2	t
Total	0,58	0,33	2,93	0,60	0,36	3,13	0,14	0,02	0,58
Foreigner	0,24	0,06	1,04	0,08	0,01	0,32	-0,27	0,07	1,16
Domestic	0,81	0,66	5,78	0,79	0,62	5,28	0,61	0,37	3,13

Degrees of Freedom (df) = 17
a: $p < 0.05$

However, while the total number of arrivals has been increasing, "not significant" correlation values between years and occupancy rate can only be reasonable if the accommodation capacities are also increasing. In fact, between 2006 and 2020, total number of accommodation facilities has been doubled as shown in Table 4.

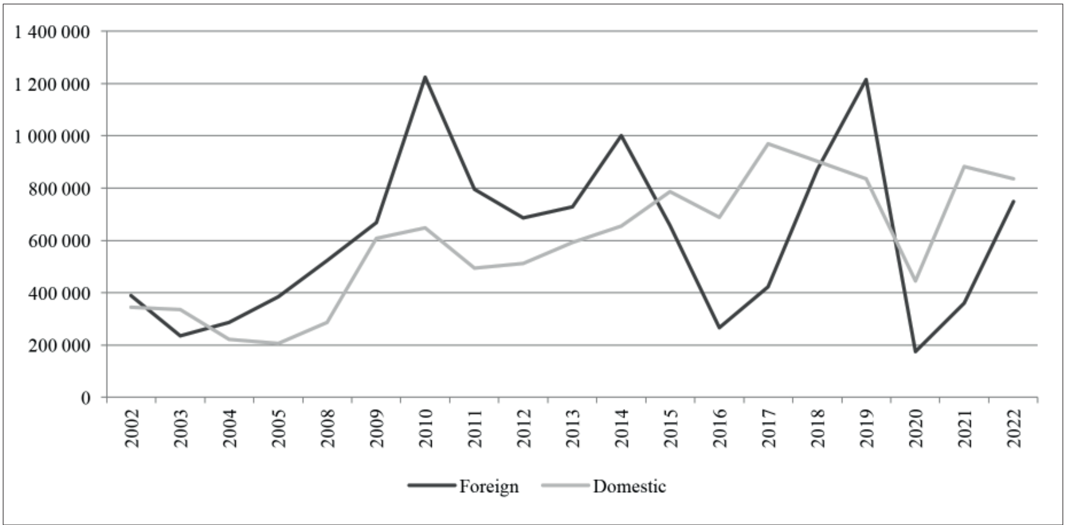
Table 4: Number of accommodation facilities in the Province of Nevşehir between 2006 and 2021.

Years	Number of Facilities		
	Certified by the Ministry	Certified by the Municipality	Total
2006	51	172	223
2008	54	172	226
2010	55	220	275
2012	61	224	285
2014	83	254	337
2016	106	254	360
2018	114	228	342
2019	121	303	424
2020	127	324	451
2021	141	322	463

Source: Arranged by the authors from 2006 - 2021 accommodation facility statistics of KTB
Note: Database has not been updated to 2022 by the authorities.

Tables above show that tourism industry in Cappadocia Region depends greatly on high tourist mobilities, and, to put it bluntly, seems to be apparently vulnerable to the fluctuations in the number of tourists. In general, tourist mobility characteristics of the destination can be identified in terms of high arrival rates with fairly low average length of stay in the region, and the occupancy rates remain mostly similar through years owing to the capacity increases. Short average length of stay values indicate that the region is not a final destination especially for foreign tourists. Cappadocia Region is one of the main heritage tourism destinations of Turkey mostly embedded to other destinations in the country such as the heritage destinations of Istanbul, Aegean region, northern Anatolian and south eastern Anatolian regions. On the other hand, region is also embedded to many of the summer tourism destinations package tours as many of the participants identified as well. Therefore, the region is also vulnerable to the fluctuations of national total number of foreign arrivals. Foreign arrivals have been fluctuating greatly since 2002 and Figure 2 shows the change in the number of foreign and domestic tourists in the Province of Nevşehir between 2002 and 2022.

Figure 2: Change in the number of foreign and domestic tourists in the Province of Nevşehir (2002-2022).



Interviews revealed that many of our participants had already experienced economic consequences of two major influenza outbreaks that were the Influenza A (H1N1) pandemic in 2009 and 2010, and Avian Influenza (H5N1) outbreak in 2012. Participants in the accommodation group mentioned about at least one of those outbreaks during the interviews, and identified that they were responsible for the fluctuations in the foreign tourist arrivals in the period between 2010 and 2012. But more importantly, 11 of these participants openly expressed their wrongful business predictions when Covid-19 outbreak has just begun in the first weeks of January, 2020, simply because of their past experiences about influenza outbreaks. One of our participants who is an owner of a local hotel in the District of Ürgüp, for instance, explained his failed predictions:

> *When we heard the first news about the outbreak of this disease in China, most of us thought that it was something like flu. In 2010, I have infected by flu and have recovered in a week. Although it was tough, it was just flu. Most of us made a huge mistake not to take possible consequences seriously in the beginning since we wrongfully assumed that it would be like 2010 and 2012 flu outbreaks.*

The economic consequences of Covid-19 pandemic were identified by the participants as "far worse than ever". All the participants underlined that the former crises have had impacts on tourism business in the region as well, but never before in region had domestic and foreign tourist mobilities stopped together. Even in the period when the restrictions have begun to be loosened after June, a great majority of the tourism enterprises has not actually enjoyed the re-opening as much as other destinations. Three main reasons were identified in the interviews including (a) season characteristics of the region as a heritage tourism destination, (b) changing "packet tour organization" tendencies of national and international tourism agencies, and, (c) major declines in the "individual tourist" mobilities which are also identified as the general Covid-19 challenges that SMTEs face in the region.

4.2. Covid-19 Challenges that SMTEs Face in Cappadocia Region

Those challenges were identified by two groups of participants from 6 settlements which are located in the core of tourism activities of Cappadocia Region. 35 of the participants represent small and medium accommodation facilities, and 62 of the participants represent other tourism enterprises including food and beverage facilities, traditional production and giftshops, and leisure activity facilities located in the case study settlements. Table 5 and Table 6 show the details and distribution of the participants based on tourism facilities.

Table 5: Group 1 Participants

Case Study Settlement		Hostel / Pension	Hotels (without a restaurant)	Hotels (with a restaurant)	Total
Central District	Göreme	5	2	2	9
	Uchisar	2	1		3
District of Avanos	Avanos	1	1	6	8
District of Ürgüp	Ürgüp	2	2	8	12
	Ortahisar	1		1	2
	Mustafapaşa	1			1
Total		12	6	17	35

Table 6: Group 2 Participants

Case Study Settlement		Food and Beverage	Traditional Production and Giftshops	Leisure Activities*	Total
Central District	Göreme	5	5	4	14
	Uchisar	4	3		7
District of Avanos	Avanos	4	8	4	16
District of Ürgüp	Ürgüp	4	6	2	12
	Ortahisar	5	3		8
	Mustafapaşa	3	2		5
Total		25	27	10	62
** Including ATV rentals, horse riding, bicycle and trekking tours*					

We only included tourism facilities which were active in the business at least for five years as explained in the methods section. Therefore, the youngest enterprise was 5 years old while the oldest has been active in business for 37 years in which the details are shown in Table 7. It is found that, especially leisure activity enterprises were younger than others. According to these participants, those activities have begun to be offered recently especially after increasing demand for balloon tours. They expressed that many of the younger tourists have begun to request a multiplicity of adventure and nature activities. However, all those leisure activity enterprises employ less than 10 employees currently. Besides, 96 participants out of 97 employ less than 50 employees and 70 of them employ less than 10 employees. But especially participants of food and beverage, and hostel or pension facilities underlined that they usually employ temporary or seasonal workers especially in summer and autumn times when the number of daily and weekend visitors increase. Table 8 shows the number of permanent employees.

Table 7: Business age of participant facilities and enterprises

Years	Accommodation Facilities			Other Tourism Enterprises			Total
	Hostel / Pension	Hotels (without a restaurant)	Hotels (with a restaurant)	Food and Beverage	Traditional Production and Giftshops	Leisure Activities	
05-09	1			8	12	8	29
10-14	7	4	6	9	11	2	39
15-19	3	2	8	6	3		22
20+	1		3	2	1		7
Total	12	6	17	25	27	10	97

Table 8: Number of employees

Number of Employees	Accommodation Facilities			Other Tourism Enterprises			Total
	Hostel / Pension	Hotels (without a restaurant)	Hotels (with a restaurant)	Food and Beverage	Traditional Production and Giftshops	Leisure Activities	
1-9	12	1		20	27	10	70
10-49		5	16	5			26
50+			1				1
Total	12	6	17	25	27	10	97

Main challenges that participants identified were classified under three titles including season related, changing tendencies of the tour agencies related and individual tourist loss related problems. Table 9 shows those challenges identified by both groups of participants.

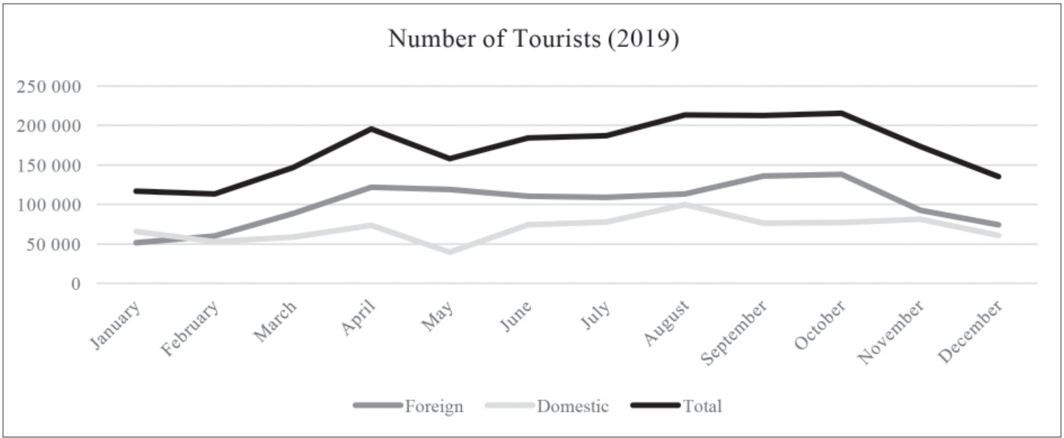
Table 9: Commonly identified main problems in Covid-19 pandemic times.

Season Related	Tour Organizations and Agencies Related	Individual Tourist Tendency Related
Yearlong season	Cancellation of packet tours from summer destinations	Elderly domestic tourist losses
Elderly domestic tourist	Tendency of foreign tourists to cancel their heritage tourism plans	Individual tourist losses due to their tendency to cancel their heritage tourism plans
Cancellation of local organizations such as adventure competitions etc.	Tendency of the arriving packet tours to stay in big chain facilities mainly with “all inclusive” options	Individual tourist losses due to their tendency to join tour organizations
Declines in the number of excursionists	Elderly domestic tourist losses	Tendency of individual tourists to choose summer destinations in a shorter season
Seasonal worker bottlenecks		Declines in the number of excursionists
Late season opening of hot air balloon tours		
Chain impacts on local business relations		
Additional costs of Covid-19 precautions		

While some of those problems are common challenges that global tourism industry face during the pandemic, some of them seem to be either destination or tourism type specific ones. In the first place, all the participants expressed in various ways that tourism functions and facilities in Cappadocia Region have been active whole year except some minor exclusions such as stormy weather or heavy snowing. Therefore, the season is a yearlong one and unlike summer destinations, economic impacts of closed period between March and May have been worse. Moreover, all the participants underlined the loss of elderly domestic tourists.

According to the participants, elderly tourists choose to visit the region during spring or autumn times when the weather is warm. They also stated that they have lost a majority of domestic daily or weekend visitors even when the restrictions loosened after June owing mainly to changing travel choices of those visitors after restrictions and curfews, and to the worsened economic conditions of the society in general. We quantitatively analyzed monthly visitor numbers, occupancy rate changes, and average length of stay in 2019 to explore if the season is actually a yearlong one as participants underlined. We also show the monthly values of the same variables in 2020. The monthly comparisons of these variables between 2019 and 2020 clearly indicate overwhelming changes that the destination faced. While Figure 3 shows the comparison of monthly change in the number of tourists in the province between 2019 and 2020, Figure 4 shows the comparison of occupancy rate and Figure 5 shows the comparison of average length of stay in the province between 2019 and 2020.

Figure 3: Comparison of monthly change of the number of tourists in the Province of Nevşehir (2019-2020)



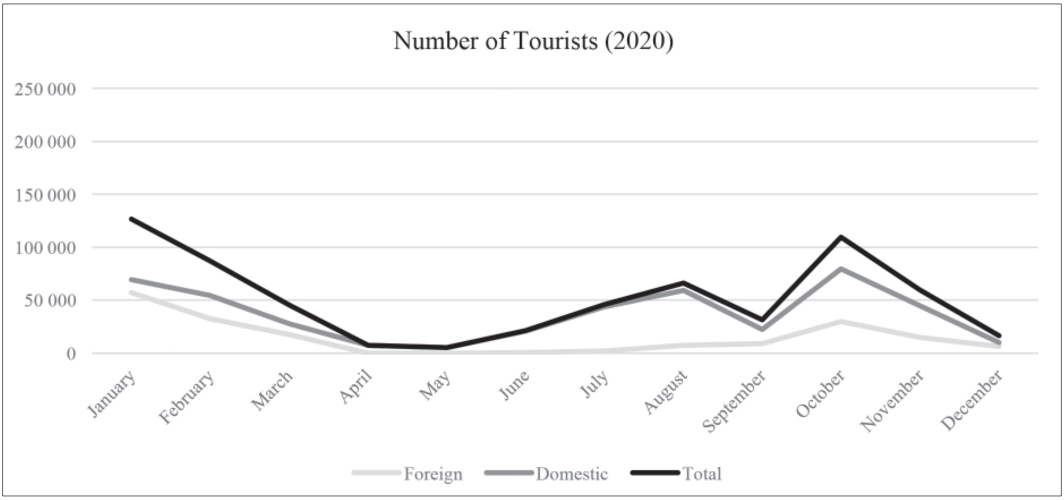
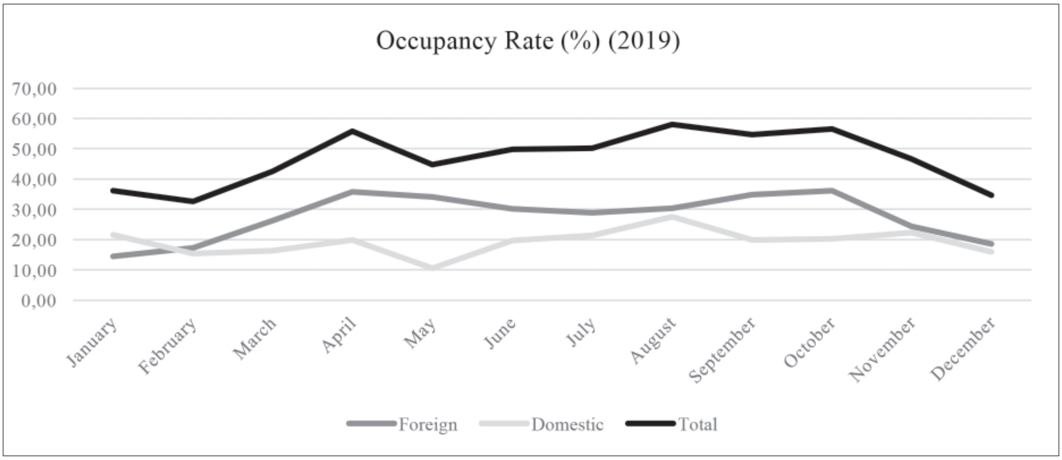


Figure 4: Comparison of Monthly change of the occupancy rate of the accommodation facilities in the Province of Nevşehir (2019-2020)



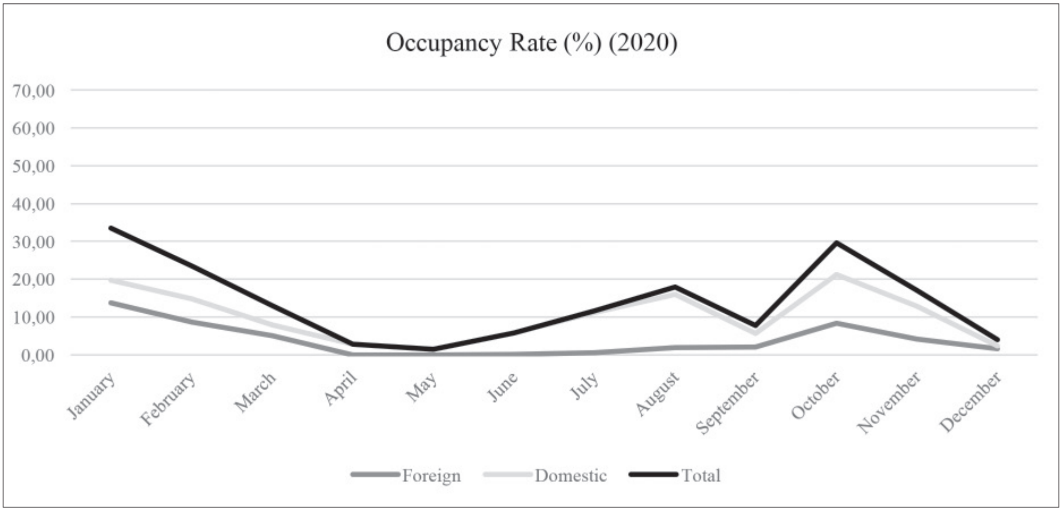
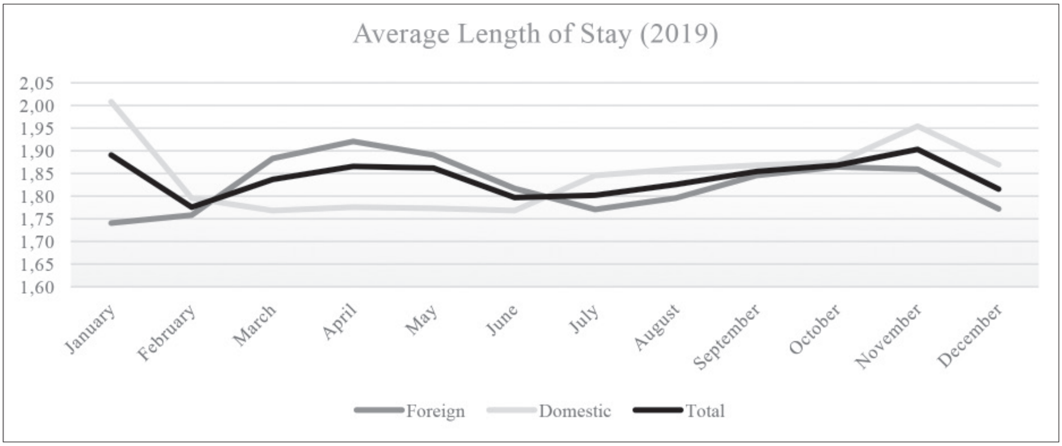
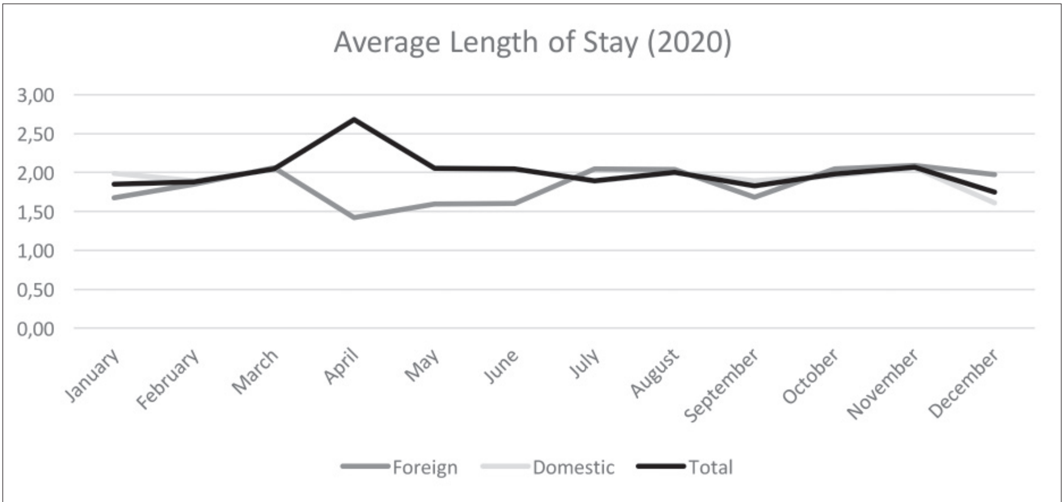


Figure 5: Monthly change of the average length of stay in the accommodation facilities in the Province of Nevşehir (2019)





Total number of tourists tend to increase between April and October due to an increase tendency of foreign tourists in the same period, but the number of domestic tourists seems to be more stable during the year which eventually indicate that there is not a particular peak season, and tourism mobility continuously remains during the year. Participants also expressed that the number of individually travelling tourists has declined greatly. According to them, those tourists have always been one of the main customers of especially SMTEs in the region, and together with the excursionists, they are crucially important for them to survive. One of the participants from the District of Avanos explained the importance:

Our shop is small and we can host only a limited number of tourists inside. The number of tourists in tour groups are usually a lot and when they visit the shops, some of the guides prefer larger shops for them. Some of the local guides divide groups into three or four and make them visit our shops but our usual customers are either the individually traveling visitors or daily visitors.

This problem was also identified by some of the accommodation facility owner participants. They expressed that small accommodation facilities are highly dependent on individual tourists. According to them, there are individual heritage tourists who are mostly foreigners and who visit Turkey's heritage sites from east to west. Those tourists travel independent of a strict visiting plan and usually do not formerly book for rooms, and some of them seek for cheaper places to stay. Participants stated that international travel restrictions mostly stopped the mobilities of this kind of tourists which caused a total decline in those “unevenly” traveling individual travelers. One of the participants who was the owner of a small pension in Göreme settlement underlined their importance:

If you are not familiar with this type of tourist, you may consider that their number is less. But this would be wrong. They travel independent of season; they do not require extra services and they do not book a reservation. They usually stay one night and continue their travel and even though they do not spend a lot of money, they are our main customers here for more than 15 years.

Interviews revealed that the mobility of this tourist type in the region has almost stopped during the pandemic owing specifically to the international travel restrictions. And assuming Cappadocia Region is one of their favorite heritage tourism destinations, most probably all the national heritage tourism destinations have been suffering from the loss of those travelers. In addition, loss of individual travelers seems to have been influencing local solidarity-based business relations negatively. Both participant groups indicated that the loss of a tourism facility eventually caused losses of another. Three of our participants to whom we conducted interviews in turn by the suggestion of the first participant explained the details of this problem: (First participant suggested a fourth entrepreneur but he did not consent to participate. However, other three participants gave specific details about their business relations between those four SMTEs)

(…) I am the owner of this small hotel, we have 12 rooms, and we only serve breakfast for our guests. Every year we establish certain contracting relations with tour agencies, but our usual guests are individual tourists. I suggest my guests this (gives the name of the business) *diner for lunch and dinner, and also when we are full, I direct new guests to this* (gives the name of the hotel) *hotel* (Participant A- owner of a small hotel in Göreme settlement) (…)

(…) Yes, and I also suggest these hotels for stay for my customers who ask for a place to stay with a reasonable price (Participant B – owner of a diner in Göreme settlement) (…)

*(…) We help each other. My facility is also small with 14 rooms. I also suggest this (*indicating the owner of the diner*) diner for my guests and direct coming guests to his hotel when we are full. We also provide our guests with a certain discount for bike or ATV tours or rentals from Mr. (…) (*gives the name of the entrepreneur who did not consent to participate*), and he also suggests our facilities for his customers* (Participant C – owner of another small hotel in Göreme settlement) (…)

Comments of those participants provided a valuable insight of local tacit solidarity relations. Those participants were not relatives but established mutual relations, and they have been suffering from Covid-19 altogether now. Moreover, many of our participants also expressed that majority of tourists tended to choose summer destinations instead. Since Turkey has implemented one of the strictest limitations in the period between March and June, especially domestic tourists tended to escape from big cities to summer destinations which eventually dropped the number of visitors in heritage destinations. This problem is also one of the main challenges that participants from accommodation facilities have identified as shown in Table 10.

Table 10: Challenges identified by the participants from accommodation facilities

Season Related	Tour Organizations and Agencies Related	Individual Tourist Tendency Related
Cancellation of reservations in the restriction period	Failures to compete with big chain facilities and to establish new short term business relations with agencies	Individual domestic tourist losses
Seasonal worker bottlenecks	Advantages of bigger facilities to use Safe Tourism Certificate as an advertisement	
Difficulties and additional costs of Covid-19 precautions for small accommodation facilities	Tendency of agencies to establish relations with bigger facilities which acquired Safe Tourism Certificate	

All the participant facilities were complaining about the additional expenses caused by mandatory Covid-19 precautions, even though they were thankful of season re-opening. However, most of them indicated that this re-opening was far from compensating their losses since the number of customers was far less than cancelled reservations. Furthermore, they expressed their difficulties in terms of competing with big, and chain facilities. Safe Tourism Certificate has been an opportunity for accommodation facilities in Turkey to attract tourists. However, in the first circular, the minimum number of rooms for applications for Safe Tourism Certificate was identified as 50, which was changed to 30 rooms in the second circular. This new circular was released approximately 5 weeks after we have started conducting data from the case study settlements, and by the time the interviews completed, only 2 of our participants have applied to, but not yet have acquired the certificate. In fact, 9 of our participants were owner / managers of accommodation facilities with more than 30 rooms in which the biggest facility had 45 rooms. During the interviews, participants expressed that the smaller the facility is, the harder to meet the necessities to acquire or even apply for the certificate. In the first week of January 2021, we called 2 of our participants who have applied for the certificate and they told us that they have acquired. In the same week, we called other 7 participants if they have applied for the certificate or not, and they told us that they were preparing for application. According to the Safe Tourism Certificate data of the KTB, 56 of accommodation facilities have acquired the certificate in the case study settlements. Table 11 shows the details.

Table 11: Accommodation facilities that received safe tourism certificate (Until February, 2021).

Districts	Accommodation Facilities		
	Certified by the Ministry	Certified by the Municipality	Total
Central District	13	17	30
District of Avanos	4	0	4
District of Ürgüp	14	8	22
Total	31	25	56

Source: Arranged by the authors from Safe Tourism Certificate statistics of KTB, n.d.(a); (b)

Even so, 26 of our participant accommodation facilities had less than 30 rooms. They are not obliged to acquire this certificate, but by their own consent, they have the opportunity to apply for it. However, the circular identifies that every facility, which applies for the certificate, needs to reserve an isolation room for the guests who is infected or suspected to be infected by Covid-19, and the facility is obliged to serve all the needs of those guests during the isolation without letting them leaving their room. Thus, the certificate itself becomes a challenge especially for small and medium accommodation facilities while it gives an open advantage for big ones.

Being an SMTE itself seems to be challenging in Covid-19 times not only for accommodation facilities, but other tourism enterprises as well. Especially social distance measures obliged small facilities to perform lower capacities which eventually lowers the income of those facilities. Table 12 summarizes the main problems identified by other tourism enterprises in the study. But the main question is about to what extent they were able to survive.

Table 12: Challenges identified by the participants from other tourism enterprises

Season Related	Tour Organizations and Agencies Related	Individual Tourist Tendency Related
Low capacity working because of Covid-19 precautions	Tendency of the arriving packet tours to stay in big chain facilities mainly with “all inclusive” options and not visiting local artisan shops	Declines in the number of excursionists
Deficiency due to unsold inventory in the restriction period including traditional agricultural production		Declines in the number of individual customers who require daily adventure or nature tours
Inappropriate ventilating conditions in traditional artisan workshops		Deficiency due to unsold inventory

4.3. Strategies for Survival

Unfortunately, only a limited number of strategies were revealed by the interviews. Four main strategies for survival used by the participants were identified by them. The first one is to stop all new investments, postpone ongoing subcontracting relations especially with the local suppliers, discharge all the seasonal workers and wait until the overwhelming impacts of the pandemics end. The second strategy refers to the efforts of the participants to increase their share in the domestic tourist mobilities especially after the domestic mobility restrictions end in June 2020. To achieve this target, participants identified that they lowered the accommodation prices to make the domestic tourists stay longer in the region. This strategy becomes clearly visible when the monthly average length of stay graph in Figure 5 above investigated. Between July 2020 and November 2020, total average length of stay increased above 2.00 nights and especially after July 2020 until the end of the year, average length of stay remains above the 2 decade long average values. These two strategies were identified by the accommodation facility owner participants.

Third strategy was a common strategy for all the participants that refers to some side-business activities especially intensified on traditionally remaining agricultural activities. This strategy becomes much more meaningful in perspective of Tucker’s (2010) findings about the entrepreneurial characteristics of the region. According to her, peasant continuities produce hybrid entanglement of traditional and modern structures and many of the tourism entrepreneurs of the region tended to maintain their traditional family-based connections with agricultural production (Tucker, 2010). Fourth strategy identified by the participants was seeking new sub-contracting relations especially with the accommodation facilities which discharged their seasonal workers. This strategy is identified by the specific participants from the second group who are the owners of food and beverage facilities.

All the participants tried to hold on by using their former savings in the period between March and June. In this period, national government declared certain supporting measures such as the circular on Covid-19 exceptions about reservation cancelation penalties (KTB, 2020b), low-rate credit loan options from state banks, and some other employment preserving measures. However, participants indicated that those supports were far from compensating their losses and did not help them using their savings. They seem to be spending their future opportunities of investment and growth, but they have not been shutting down yet. 2020 accommodation statistics indicate that the accommodation capacities have increased even though slower than usual as shown. Table 13 shows the monthly numbers of accommodation facilities with room and bed numbers.

Table 13: Monthly number of accommodation facilities in the Province of Nevşehir (2020)

Months	Number of Facilities	Number of Rooms	Number of Beds
January*	*N/A*	*N/A*	*N/A*
February	439	12277	27210
March	443	12282	27247
April	444	12288	27259
May	446	12430	27547
June	447	12450	27587
July	448	12458	27607
August*	*N/A*	*N/A*	*N/A*
September	451	12561	27815
October	451	12561	27815
November	451	12648	27989
December	451	12648	27989

* Data is missing
Source: Arranged by the authors from accommodation facility statistics of the Ministry of Culture and Tourism

The data until September was released when we started conducting interviews, and we asked participants about the reasons of this increase. They stated that the increase was due to the former investments of entrepreneurs which have already planned perhaps before 2019. According to them, actual indicators about to what extent their endeavors are successful will appear in 2021 statistics and many of the participants expressed that recovering will be much more difficult. However, we also found that some of the participants have secondary income sources such as agricultural production and trading of agricultural production. Tendency of some of the tourism entrepreneurs to establish complementarity-based relations with agricultural production in the region, which aimed to create a multiplicity of income sources for the SMTEs, has been identified in some studies (Calisir-Hovardaoglu and Hovardaoglu, 2020). This tendency seems to have helped those tourism entrepreneurs to survive and to hold on. In addition, we also found that some of the local diners and restaurants, whose functions were restricted by Covid-19 precautions and could only continue take-away services, and hotels established a kind of contracting relation. 4 of our participants who are owners of local diners or restaurants have been serving for accommodation facilities as a catering facility. Even though this strategy does not seem to be prevalent among all of the food and beverage facilities, it is necessary to be underlined.

To put in a nutshell, especially SMTEs in this globally well-known heritage tourism destination have been suffering from the impacts of Covid-19 even though they have been trying hard to survive. Moreover, SMTEs seem to be affected much deeply by those impacts than big tourism enterprises. Many of them have been trying to support each other as much as they can and they have been establishing new relations with each other. However, almost all of them have been spending their savings for their future investments and / or growth. In fact, as many of the participants indicated, recovery seems to be harder than survival for those SMTEs.

5. Conclusion

Due to Covid-19 pandemic, 2020 has been one of the most challenging periods of history globally in every angle. Together with every economic sector, tourism industry has been suffering from the impacts of both the disease and the restrictions implemented by governments worldwide. Since the first days of the outbreak, researchers have begun to analyze the impacts and many studies have revealed a multiplicity of consequences of those various impacts. Since almost every precaution implemented to avert the spread of the disease preliminarily suggested restrictions of human mobilities even with curfews and quarantines. Owing to the fact, tourism appears to be one of the most vulnerable sectors to the impacts of Covid-19, and the vulnerability of regional development efforts of destinations varies from one another owing mostly to varying economic dependency of those destinations on tourism. This study found that, destination characteristics are significant in terms of this vulnerability.

In this research, impacts of Covid-19 both on a globally well-known heritage tourism destination in Turkey, which is the Cappadocia Region, and on SMTEs located in this destination were investigated. We found that heritage tourism destinations seem to be much vulnerable than, for instance, summer tourism destinations owing particularly to the destination characteristics and characteristics of heritage tourism as well. We also found that the impacts of Covid-19 restrictions and precautions on SMTEs seem to be much challenging. While social distancing, mask wearing and hygiene have gradually become primary determinants of daily life, small tourism facilities, whose economic functions and profits rely on high number of customers in a short time period, have continued suffering from social distancing-based decreased capacity implementations.

The Covid-19 impacts have been, and still are, exhausting for those SMTEs, but even so, they have been trying hard to survive and hold on. This study identifies newly established cooperative and solidarity-based relations between different tourism entrepreneurs particularly based on former ties between them. In addition, it is also found in the research that some of the formerly established supporting secondary income sources have helped those tourism entrepreneurs to find complementary opportunities to economically resist the impacts of the disease. However, savings for future investments and growth have been spending as well which seem to pave a much harder way for them to recover.

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