

Seasonality of Turkish Arrivals to Municipality Licensed Thermal Hotels: A Case of Afyonkarahisar, Turkey

Hasan Hüseyin SOYBALI

Afyon Kocatepe University

School of Tourism and Hotel Management, Afyonkarahisar, Turkey

hsoyballi@aku.edu.tr

Ahmet BAYTOK

Afyon Kocatepe University

School of Tourism and Hotel Management, Afyonkarahisar, Turkey

ahmetbaytok@aku.edu.tr

Veysel AĞCA

Afyon Kocatepe University

Faculty of Economics and Administrative Sciences, Afyonkarahisar, Turkey

agca@aku.edu.tr

Abstract: Seasonality is a common problem and affects all stakeholders of in tourism industry. As a promising tourism type with its great potential, despite common beliefs, thermal tourism demand also indicates seasonal trend with peaks in high seasons and troughs in low seasons. This study identifies seasonal patterns of domestic guest arrivals to and nights spent in Municipality registered thermal hotels in Afyonkarahisar, Turkey between 2000 and 2008 by using ARIMA method. Findings indicate that there is a strong seasonality in Turkish guest arrivals to Municipality licensed thermal hotels which is closely related with official holiday calendar and school holidays in Turkey. These thermal hotels should realise the effects seasonality and take immediate action to improve seasonal patterns for more evenly distributed seasonal domestic tourism demand and better future for all.

Keywords: Seasonality, Thermal Tourism, Afyonkarahisar, Turkey

Introduction

Many industries have faced seasonality problem throughout the world. Tourism industry, in particular, is badly affected by seasonal tourism supply and demand and as Butler, 2001, states it is one of the main defining characteristics of global tourism. As Baum and Lundtorp, 2001, emphasize seasonality impacts on all aspects of supply-side behaviour in tourism, including marketing, the labour market, business finance, stakeholder management and all aspects of operations. While seasonality leaves many resources unutilized and employees unemployed during the low season, heavy demand during the peak season, on the other hand, also cause some serious problems such as crowdedness, congestion, poor air quality, lower service quality. Therefore, it is a serious problem to tackle and a well documented subject in tourism literature. BarOn, 1975, Sutcliffe and Sinclair, 1980, Yacoumis, 1980, Wanhill, 1980, ETAG, 1984, O'Driscoll, 1985, Hartmann, 1986, Soesilo & Mings, 1987, Allcock, 1989, Ball, 1988, Snepenger & Houser, 1990, Furr et. al., 1992, Butler, 1994, Baum & Hagen, 1999, Baum & Lundtorp, 2001, Koc & Altinay, 2007, Palang et. al., 2007 and many other authors evaluated the seasonality and related issues from different perspectives through the years. BarOn (1975) whose study has been a starting point for many other studies on seasonality stated that there are two types of seasonality; "natural seasonality" and "institutionalised seasonality". While he accepted climate and weather conditions as primary causes of natural seasonality, he stressed that, holidays and other events at specific times of each year like religious vacations, school vacations and festivals are also to be blamed for institutionalised seasonal fluctuations in supply and demand levels.

One of the oldest ways to benefit from geothermal resources is using them in spas (jeotermaldernegi.org.tr, 2010) for bathing and treatment purposes. The use of geothermal waters for tourism purposes is expressed as thermal tourism in today's world. Thermal tourism can be defined as using mineralized thermal waters for health, recreation and relaxation aims and it displays different characteristics from other types of tourism. Thermal tourism provides an

opportunity to serve continuously 12-month a year. Occupancy rates are generally high in thermal enterprises. It can easily be integrated with other types of tourism such as cultural and convention tourism. Health is the main purpose of existence of Thermal tourism. Thermal tourism is thought to be less seasonal than other types of tourism because it usually does not depend on weather conditions and climate. However, the demand for thermal tourism is affected by the same factors which affect the demand for other tourism types and this causes fluctuations and creates high and low seasons.

Turkish tourism has developed greatly since early 1980s. 27.3 million foreign visitors and 4.6 million Turkish expatriates visited Turkey in 2009 and spent around 21.2 billion US Dollar (Republic of Turkey Ministry of Culture and Tourism, 2010a). As a strategy, Turkey is trying to diversify its product range, attract more visitors to all regions of Turkey and earn more foreign currency. In this respect, thermal tourism is one of the encouraged tourism types in Turkey as it has great thermal water potential and there is an increasing demand potential from aging European countries. However, thermal facilities in Turkey have still been utilized largely by Turkish citizens and thermal tourism plays an important role in Turkish domestic tourism. This is supported by Ministry of Culture and Tourism's statistics. While only 5% of the number of nights spent by foreign visitors in municipality licensed thermal hotels in 2008, Turkish citizens overwhelmingly spent 95% of 703486 nights in these facilities (Republic of Turkey Ministry of Culture and Tourism, 2009).

Afyonkarahisar is a province of Turkey located in the West part of Anatolia on the conjunction of Istanbul-Antalya, Ankara-Izmir Highways and connects Eastern and Northern provinces to Western and Southern provinces. Afyonkarahisar is one of the richest provinces of Turkey in terms of natural hot springs and quality thermal accommodation facilities. It is in one of the thermal tourism regions, declared by the Ministry of Culture and Tourism, "Phrygian Culture and Thermal Tourism Development Region" (Republic of Turkey Ministry of Culture and Tourism, 2006). There are four distinct thermal tourism centres within Afyonkarahisar; Omer-Gecek in the city centre, Ihsaniye Gazligol, Sandikli Hudai and Bolvadin Heybeli (Republic of Turkey Ministry of Culture and Tourism, 2006). While Ministry of Culture and Tourism licensed thermal hotels prefer Omer-Gecek mainly because of its closeness to the city centre and Sandikli Hudai partly, many municipality licensed thermal hotels and thermal timeshare facilities are located in Ihsaniye Gazligol and Bolvadin Heybeli thermal regions.

Afyonkarahisar currently has four Ministry of Tourism registered 5-Star thermal hotels in city centre and 8 Municipality Licensed thermal hotels scattered throughout the province. In 2008, all hotels in Afyonkarahisar entertained around 303,000 guests who spent 778,000 nights of which nearly 99% belong to Turkish Citizens. From this point of view, it should be stressed that 96.5% of nights spent in Afyonkarahisar realized in Ministry and Municipality registered thermal hotels. While 53% of the nights spent in thermal hotels was recorded in Municipality licensed thermal hotels (397731), the remaining 47% was recorded in Ministry registered thermal hotels (353598). In other words, the main market for the Afyonkarahisar hotels is domestic market and despite rapidly increasing number of Ministry of Culture and Tourism registered thermal hotels and bed capacity, Municipality registered hotels still play an important role in accommodating thermal tourism guests.

The Study

Hotels and similar accommodation facilities are licensed either by Ministry of Culture and Tourism or local Municipalities according to their conformity to set standards. This study investigates the seasonal patterns of domestic guest arrivals to Municipality registered thermal hotels in Afyonkarahisar, Turkey between 2000 and 2008 to help these hotels to see the overall seasonality of guest arrivals and take action to improve seasonality in guest arrivals. In this respect, it focuses on the monthly Turkish guest arrivals and time-series analysis by employing ARIMA (Autoregressive integrated Moving Average) method. This method defines a univariate time series as a function of its past values and other significant independent variables and has been used in many analogous studies to test for seasonality and environmental effects (Lin & Xiraxagar, 2006:797). Through the study, seasonal indices for monthly guest arrivals are computed by using SPSS statistics package software.

Findings

Although guest arrivals to Municipality licensed Thermal hotels in Afyonkarahisar Omer-Gecek thermal tourism region between 2000 and 2008 indicate an increasing trend through the years (88677 and 122747 respectively), number of nights spent showed a dramatic decrease between 2000 and 2002 from 470257 to 269796 because of the financial crises in Turkey. Despite the increase in number of nights spent since then, it still well behind the 2000 figures. The reason for this decrease may be the opening of new qualified 4 and five star hotels in this period of time.

The computed monthly indices indicate the degree of seasonal fluctuations and 100 represents the point where there is no seasonal fluctuation. If the indices exceed 100, it represents the existence of concentration. In this respect, seasonal indices of arrival statistics to Municipality licensed thermal hotels indicate that the high season is between May and September and between September and April is the low season for these hotels (Table 1, Figure 1).

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Turkish Arrivals	61,1	52,2	59,2	79,8	114,0	140,3	168,9	170,1	134,7	89,6	64,9	65,3
Turkish Nights Spent	67,6	64,5	55,9	78,2	99,7	142,1	165,1	172,2	131,8	94,4	65,0	63,9
2009 Arrivals Forecast	63,2	53,3	65,2	87,9	114,4	133,9	174,4	176,2	117,4	74,8	68,4	70,0
2009 Nights Forecast	67,9	70,2	58,4	81,5	105,0	129,7	161,6	175,9	120,7	84,2	74,5	69,9

Table 1: Seasonal Indices for Turkish Arrivals to and Nights Spent in Municipality Licensed Thermal Hotels

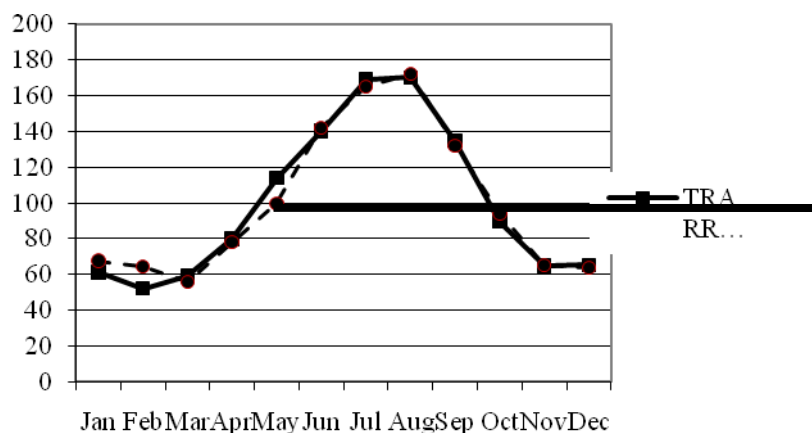


Figure 1: Seasonal Indices for Turkish Arrivals to and Nights Spent in Municipality Licensed Thermal Hotels

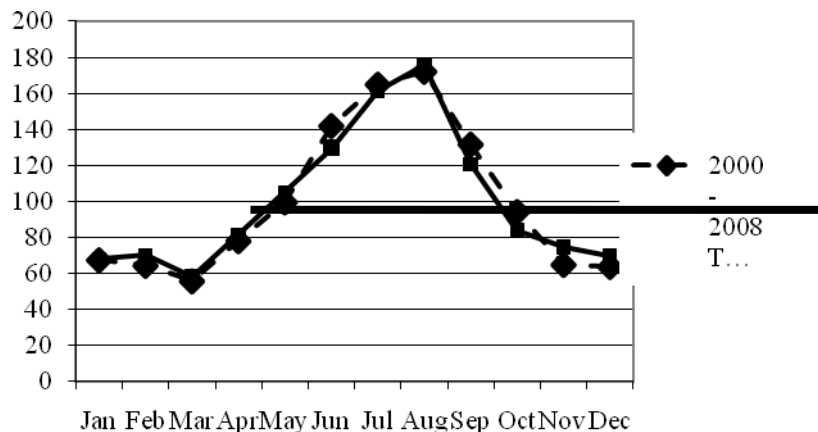


Figure 2. Forecasted Seasonal Indices for Turkish Arrivals to and Nights Spent in Municipality Licensed Thermal Hotels

While arrivals reach its peak point in August, it bottoms out in February. Although the peak month is also August for the number of nights spent by Turkish guests, March has the lowest season indices for it. In other words, although arrivals reach its lowest level in March, because of the mid-term school holidays, which usually take place at the beginning of February, people stay longer in these thermal hotels and after schools open again the number of nights spent falls dramatically to its lowest level, more guests arrive but stay shorter. This means that thermal hotels

in Afyonkarahisar are highly vulnerable as to a large extent it is dependent on largely institutionalised seasonality factors mentioned by BarOn (1975). In addition fasting month of Ramadan has a decreasing effect in demand for thermal hotels. For example, although the August is the peak month for these hotels, because Ramadan of which its timing changes every year coincides with the peak month, August, it is expected that thermal hotels will experience decreases in their demand. However, thermal hotels usually experience greater demand in feasts after Ramadan and during the feast of sacrifice and reach 100% occupancy rates. All these institutionalised and partly natural factors shape the seasonal trends of these thermal hotels.

Conclusions

This study has analysed seasonal fluctuations in monthly Turkish arrivals to and nights spent in Municipality licensed thermal hotels in Afyonkarahisar, Turkey by employing ARIMA (Autoregressive integrated Moving Average) method. The study indicates that unlike the common beliefs and despite it is not climate and weather dependent, thermal tourism has also a strong seasonal pattern as other types of tourism. According to the results of the study, the demand for thermal hotels concentrates between May and September which is defined as high season and the period between October and April when there is less demand, except for religious feasts and school holidays, represents the low season. When BarOn's classification is taken into account, institutional factors cause this seasonality.

However, strong seasonal patterns of guest arrivals affect thermal hotels in a negative way and push some of them to close down in low season months which cause several chain problems such as unutilized capacity and resources and unemployment. Therefore, as well as checking the overall provincial seasonality patterns closely, they should also know their own seasonal patterns so that they can take effective actions to improve seasonal patterns. In contrast to seaside resort hotels, thermal hotels and thermal resources can be utilized twelve-month whatever the weather conditions and this requires serious marketing and management strategies and plans. To overcome this problem, Municipality licensed thermal hotels should integrate their products with other types of tourism such as cultural, convention and third-age tourism to be able increase demand in low season months.

This study has some limitations. It comprises only Afyonkarahisar, Omer-Gecek thermal tourism region. The other limitation is that the study was conducted only in Municipality licensed thermal hotels. The seasonality of thermal hotels in different regions and countries can be computed and compared with each other. Seasonality in Ministry of Culture and Tourism licensed thermal hotels should also be computed. After all, generalization can be made that thermal hotels have seasonal characteristics.

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