

JUDGEMENT OF WELLNESS TOURISM SERVICES IN THE SOUTHERN GREAT PLAIN REGION AND IN THE COMPETITOR REGIONS

Zoltán ÁRPÁSI¹, Ágnes HORVÁTH¹, Mónika FODOR², Krisztina ÁRPÁSI¹

¹Szent István University, Faculty of Economic and Social Sciences, Marketing Institute

²Budapest Business School, College of International Management and Business

H-1165 Budapest Diósy Lajos u. 22-24.

ABSTRACT

Health consciousness is an actual megatrend nowadays. Most of the people try to use every opportunity to live a healthy life. They pay attention to what they eat, how much they exercise and even choose holiday locations according to health conscious criteria. Wellness hotels are really fashionable and this is the sort of demand that needs to be followed carefully from the supply side. The survey is aimed at getting to know the motivation for choosing a particular wellness service and at examining why different wellness destinations are preferred or not. The region of the Southern Great Plain played the most important role. Data have been collected and analysed for several years. As a result, it is possible to discover the factors playing a role when choosing one particular wellness service, the consumers' expectations concerning the service providers as well as the main features of the image of the region in question and the judgement on the wellness services of the region. Analysing the results of the survey, it can be concluded that the main factors in the preference system of choosing a resort are guided by the expectations potential visitors have concerning the service providers.

Keywords: wellness, health consciousness, ranking of regions

INTRODUCTION

Living a healthy lifestyle has become increasingly important to different groups of society in the past decade. This process was influenced by several factors. A number of researchers think that to understand the reasons, we have to go back as far as the 19th century. Before that time people were promised a happier existence in the next world by Christian doctrines, that's why staying healthy while living on the Earth was a matter of secondary importance. Nevertheless, this point of view has gradually changed during the past one hundred years and at the same time people's relationship to their health has changed too. Life expectancy and the quality of life have become a matter of major importance (Imhof, 1988; Troschke, 1996; Klotter, 1997). This process was reinforced by the significant development of healthcare and medicine. The supply side immediately reacted to the altered consumer needs.

THE THEORETICAL BACKGROUND OF THE SURVEY

Wellness tourism is one of the most significant trends of our time. Wellness is a harmony of body and soul, meaning that the beauty that can be seen is combined with an inner beauty and balance (Törőcsik, 2004).

According to Graf and Tröster (Berg, 2008), the health conscious way of thinking was influenced

- by the consumers' increasing level of education,
- by better information about the subject.

International literature mentions two factors which boosted the formation of a health conscious attitude. One factor is stress due to our accelerated world; the other is the changing number of births. There is no doubt today that the prevention of illness caused by stress has become part of our everyday life. The alteration in the number of childbirths is a more complex issue. The decrease in the number of childbirths has led to more leisure time in the more developed countries, which can be put to use by the parents (consumers). On the other hand the responsibility for giving birth to a child grew, meaning that mothers are increasingly conscious of having a healthy lifestyle while expecting a baby. In this way they also give their babies a chance to become healthy themselves. Greenberg and Dintiman (1997) compare wellness to a wheel which consists of five factors: physical, social, mental, spiritual and emotional factors. If all factors are balanced, a state of wellness can be reached.

According to Haug (1991), a German health pedagogue: „wellness is a new practice orientated and pragmatic idea of health which focuses on the quality of life of the individual”. Elements of a wellness program outlined by him are: „individual responsibility, fitness, life without stress, health conscious diet and environment consciousness” (Lanz Kaufmann, 2002).

The Berlin Future Research Institution draws a sharper picture of wellness than anybody else: „the utopia of experience maximizing in an individual centered society”, which can also be understood as a modern form of hedonism. According to the institution there are two levels of wellness. The first one is called „consumer wellness” dealing with the pampering of the consumer. The second one is the connection with the environment. While inner balance and the well-being of the individual are important on the first level, the role of other influencing effects grows on the second one. A totally different opinion concerning the level is represented by Horx et al. (2003): they think that the first level is characterized by leisure, pampering, by increasing pleasure and health, whereas the second level means growing self-competence, a balanced life, learning competence and the process of being able to attain one's goal.

Considering these factors Horx outlined a wellness wave in the centre of which you can find a constant changing of the individual. According to this idea, services will soon be badly needed in the tourism sector which don't only provide a general experience but services providing an individual program and experience will be preferred („Selfness Travelling”).

After getting acquainted with international literature in this subject it might be important to analyze the significant touristic samples of the region in question in order to be able to understand the whole picture.

Presentation of the Southern Great Plain Region as a wellness destination

There have been data on the number of guests in medicinal hotels since 2001. However, we didn't have any statistical figures about wellness hotels until 2010. A comparison of the figures for the year 2010 is significant though (Table 1). Although

just 3.5% and 2.7% of the accommodation capacity can be found in medicinal and wellness hotels, these services are made use of by 10.8% respectively 7.4% of the guests. A further striking feature is the significant interest in medical hotels by foreigners. 27.1% of foreign guests stayed at these hotels for a shorter or longer time. At any rate, foreigners spend a shorter time there than domestic visitors. Wellness hotels are less popular with foreign tourists.

Table 1

Number and capacity of medical and wellness hotels in the region

County	Medical hotel		Wellness hotel	
	number	capacity	number	capacity
Bács-Kiskun	1	100	4	438
Békés	2	397	3	233
Csongrád	1	398	-	-
Region in total	4	895	7	671

Source: *KSH*, 2010

The Southern Great Plain Region is developing much more slowly than the average of the country. It shows the lowest increase in real GDP. It belongs to the ten poorest regions in the EU. Due to the reduction of agriculture and the food industry, and the lack of other capital sources, the economy of the region is unable to develop long-lastingly. In today's situation health tourism, more precisely thermal tourism might be one of the chances to break out.

Despite the favourable natural endowments and the low environmental burden, the inhabitants' prospects of living are unfavourable.

The Southern Great Plain Region is situated on a territory as large as one fifth of the country. It doesn't belong to the popular areas. Considering the total number of guests accommodated here and that of nights spent, it takes up the sixth place among the seven domestic regions. The reason for this is mostly the lack of proper infrastructure. Strictly speaking, the tourist sector (accommodation, catering) in the region had a 2.05% share in the GDP of the region in 2007.

Today the Southern Great Plain Region arouses the interest of mainly domestic guests. The number of the domestic guests and that of the nights they spend here has had an approximate share of 75% for years.

From a touristic point of view most of the guests come into our region from Germany, but the number of guests from Romania is increasing. The reason for the little foreign interest is definitely the unfavourable accessibility of the region and the fact that there are other destinations offering good quality services at a better price.

From the point of view of comparing the Southern Great Plain Region with other ones it is worth analysing the data of the Northern Great Plain and West-Transdanubia Regions. The former one has a similar situation and nearly the same natural endowments as the Southern Great Plain Region, the second one is worth analysing because of its outstanding results.

Regarding wellness hotels we aren't in possession of comparable data as there weren't any statistical figures about them until 2010. Considering the data for the year 2010 the disadvantageous situation of the Southern Great Plain Region is still striking: there are nearly twice as many wellness hotels in the Northern Great Plain and more than three times as many in the West Transdanubia as in the Southern Great Plain, with a capacity of twice, and, respectively, seven times as many as that of the wellness hotels in the Southern Great Plain (*Table 2*).

Table 2

Number of wellness hotels and their capacity

Regions	Number of hotels	Capacity (beds)
Western Transdanubia	23	4 760
Northern Great Plain	12	1 480
Southern Great Plain	7	671

Source: *KSH*, 2010

In 2010 46.4% of the guests were foreigners and the number of nights they spent in the hotels had a share of 49.2% regarding the whole country. The rate of the nights spent in Hungary by foreigners was over 30%, in West Transdanubia (44%) and in the North Great Plain (31.2%), however this rate is much smaller in the Southern Great Plain (21.7%). It is only North-Hungary that possesses lower figures (15.6%). The number of foreign guests coming from the most important countries shows a varied picture in the surveyed regions.

Guests from the neighbouring Austria as well as those from Germany and the Czech Republic spend a great number of nights in the Transdanubian Region. Romanian and Russian tourists coming from geographically far away countries spend surprisingly many nights here and the considerable interest of Swiss tourists in this region is a little difficult to understand.

In the North Great Plain the number of nights spent there by German and Polish tourists is considerable; the Romanian presence is significant, which can be explained with Romania's nearness. It is striking, however, that the Great Southern Plain Region can't boast of such figures concerning the German, the Polish, nor the Romanian tourists, although its endowments are not worse than those of its northern neighbour.

Domestic tourism is less concentrated than incoming tourism. In 2010 7,473,339 guests spent a total of 19,554,438 nights at 311,490 hotels and apartments of the country. From among the three surveyed regions the greatest number of guests arrived in the West Transdanubian Region (18.4%), the number of nights spent there is the highest as well (22%). 8.3% of the guests visited the North Great plain, having a share of 9.2% of the nights spent. Just 5.8% of the tourists accommodated in hotels and apartments spent their time relaxing in the Southern Great Plain. It accounts for 5.5% of the domestic nights spent. Considering the number of guests and the number of nights spent by them in the Southern Great

Plain Region is the least sought after in the country. The number of foreign guests was roughly speaking the same in the Southern Great Plain Region and in that of Northern Hungary, but the number of nights spent there by them was 50% bigger in the latter.

MATERIALS AND METHODS

The main goal of the research is to analyze the position of the Southern Great Plain region in terms of tourism. We would like to find out what exactly motivates the guest. Based on the information in the previous sections, one can clearly see that health tourism and wellness services are one of the few possibilities of the area. Therefore, it would be important to see what the members of the target market would expect from the region. How would they describe their needs when choosing a service provider? One can wonder whether the potential guest would feel the difference from other regions of the country or whether it needs to be communicated better.

In our overall research plan we followed the usual steps. After gathering some important secondary data, we continued with some qualitative analysis and then finally we worked on the quantitative steps as well.

In this study we discuss the results of a research based on a small sample. The sample taking was not representative so the results cannot be generalized. Independent of this fact, our survey – in accordance with its goal – provided a good starting point for preparing the conceptions of the next research.

Facts were collected by personally asking people during the period between May and June of 2010.

Our quantitative survey is a phase of a research process containing several steps. Our main goal was to analyse the peculiarities of choosing wellness services surveying samples from Budapest and those from Pest County and to analyse the main features of the customers' judgement on the Southern Great Plain Region as a wellness resort. The results of the survey helped with preparing a great-sample fact-finding, setting up hypotheses and with the numerical examination of our statements on the basis of the results of our former, qualitative examination. The survey was performed using a pretested, standardized questionnaire containing, besides three open questions, seventeen closed ones on nominal, ordinal and internal measuring levels.

The subject-matter of the research expedients were:

- making use of a wellness touristic program, an analysis of the factors playing a role in choosing a particular wellness service,
- an examination of the consumers' judgement on the Southern Great Plain Region as a wellness resort,
- personal questions.

It was a preliminary condition during the survey that the person answering the questions should come from Pest County or live in Budapest. The reason for this is that we wanted to get to know the opinion of the inhabitants of these counties

about the Southern Great Plain Region; we wanted to find out the judgement on this region regarding its wellness services.

During the survey we received 120 questionnaires that could be used (the elaboration was fulfilled with an SPSS 14.0 Statistical program).

In the following chapter, we present the results according to the above mentioned subjects.

RESULTS AND DISCUSSION

In this chapter we show the result of our quantitative examination using a small number of samples, in a structure as previously described. Based on the information from the survey, we can define two main topics in this part of the research.

The first one focuses on the analysis of the factors playing a role in choosing a particular wellness service. The second part of the questions will try to gather some information of the consumers' judgement on the Southern Great Plain Region as a wellness destination.

Characteristic features of choosing wellness services

Most of the people questioned last took part in a wellness holiday during the previous year, and the share of the people not having taken part in such a program was the same (31.7%) (Table 3). It gives us valuable information about how popular the „wellness holiday” is. The percentage of those who have never been on a wellness holiday would have been higher, if we were not focusing on the capitol and Pest county.

Table 3

Date of the last wellness holiday (N=120)

Time	Rate of the people answering (%)
More than 5 years ago	5.0
3-5 years ago	1.7
2-3 years ago	15.0
Last year	31.7
This year	15.0
Never before	31.7
Total (number)	100.0

Lake Balaton, Hévíz, Lillafüred, Hajdúszoboszló and Zalakaros were the most popular destinations. There were several holiday makers who last enjoyed wellness services abroad, in Austria.

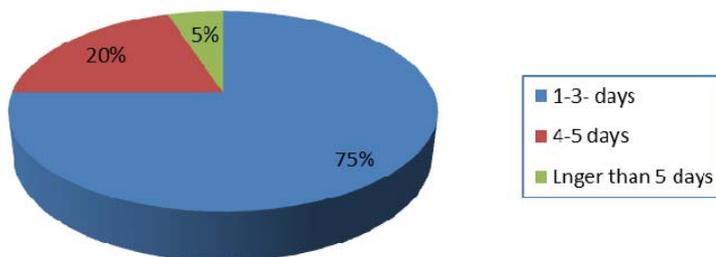
Most of the people questioned spend a long weekend enjoying 1-3 day programs. Four-five-day holidays are less, and it is rare that holiday makers want to relax spend more than five days taking part in wellness programs (Figure 1).

This means that 1-3 day programs are affordable solutions when thinking of wellness holidays. It will not require such a big „investment” but will also provide the necessary relaxation. Speaking of investment, it is also crucial to have an idea

how much health tourism is worth. This means how much money the people answering would be willing to spend on a one-week wellness vacation. According to the results it is a sum between 32 thousand and 70 thousand Ft/person, which the consumers accept as a reasonable price for a one-week wellness program.

Figure 1

Length of participation in wellness services per occasion (N=120)



According to our survey the most popular wellness services are: spa, bath, sauna and massage which is in accordance with the results of our qualitative survey where these services were found to be the most common, spontaneously mentioned alternatives (Table 4).

Table 4

Frequency of choosing a wellness service (%) (N=120)

Services	Frequency of choosing (%)
sauna	58.30
massage	58.50
bath	78.00
spa	75.60
beautician's treatments	17.10
medical attendance	2.40

Most (53.7%) of the participants in the survey seem to be satisfied with the offer provided because they claim they would choose the program again. The rate of the people who are definitely not planning to participate again is minimal (2.4%).

In our opinion this proves the viability of wellness services. The question is whether the Southern Great Plain region has a good chance of attracting attention. This is a question that needs to be answered in the second part of the survey. First we examined the position of the region in general and then by focusing on the wellness services.

Consumers' ranking of the regions

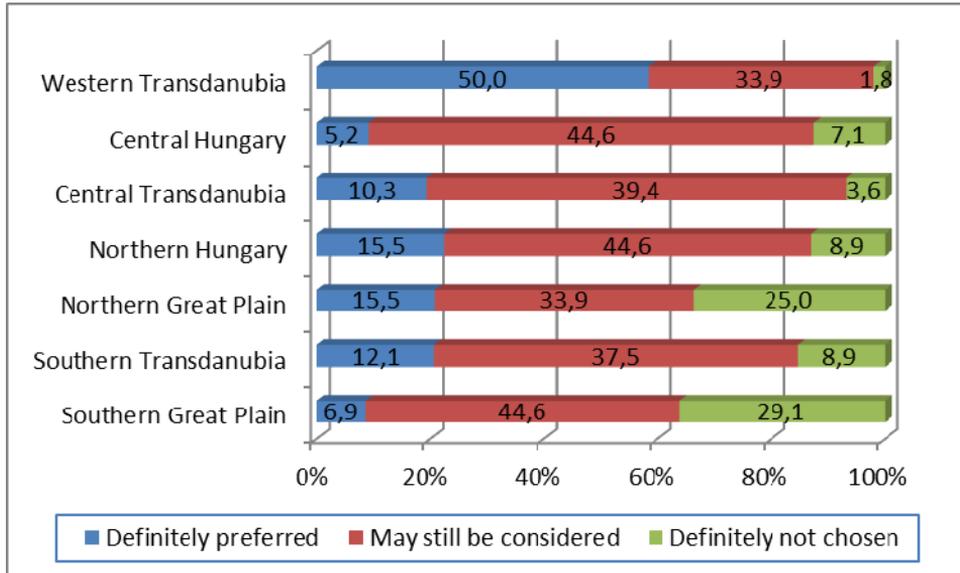
The theoretical background and the results of the secondary analysis made us definitely guess that when choosing a particular wellness service the ranking of the resort, and that of the region, may play a role, that's why we were eager to get to know the consumers' opinions about the regions respectively.

Consequently, we separately analysed the ranking of the Southern Great Plain Region in our quantitative survey. We also tried to ascertain what the position of the Southern Great Plain Region was in the consumers' opinion compared to the regions (North Hungary and Mid-Transdanubia), which we regard as our main rivals.

We examined the consumers' preferences considering the different regions in a complex way: first of all the people answering the questionnaire had to choose their favourite region. Here they only had one choice. The secondary preference analysis made it possible to find out which were the other popular destinations for wellness tourists. The circle of the non preferred regions, that is the regions where the people answering the questions would definitely not go, were analyzed as a separate category (*Figure 2*).

Figure 2

Ranking of regions considering their suitability to become a wellness resort (%) (N=120)



The absolute winner of the preference examination was the West Transdanubian Region.

According to the result of the primary preference examination this region turned out to be the most popular destination, 50% of the people participating in the survey

would choose above all this region as their wellness vacation destination. If we look at the primary and secondary preference values as a whole, the rate of the people preferring West-Transdanubia is in total 83.9%, which is the highest value. There was no other region reaching a higher rate than 60% after summing preference values.

The homogeneous, positive judgement of West Transdanubia is proved by the fact that it was chosen by the fewest people (1.8%) as an „out of the question” alternative.

In the secondary preference ranking (it may still be considered as an alternative) the Southern Great Plain, Mid-Hungary and North-Hungary took the lead with similar votes (44.6%). Among the alternatives preferred primarily however it was the Southern Great Plain Region and Mid Hungary that got the lowest valuation. (5.2% and 6.9%). This means that according to the answers they are not fashionable, popular wellness resorts at all. This statement is reinforced by the fact that the Southern Great Plain was chosen as the least preferred region by most of the people (29.1%) with the North Great Plain Region not far behind (25%).

According to the participants in the survey the Great Plain doesn't belong today to the popular, fashionable touristic destinations. At the same time the results show that the ranking of the Southern Great Plain Region is not at all homogenous or positive. Possible reasons for this are flat communication about the region, and a significant lack of strategically orientated marketing activity. This will mark one of the key areas that need improvement.

Consumers' opinion of the Southern Great Plain Region considering wellness services

In order to be able to examine consumer opinion of the Southern Great Plain Region more precisely we asked the participants in the survey to express spontaneous associations: without being given any alternatives, they had to formulate three thoughts of their own that came into their minds in connection with the region.

The most frequently mentioned expressions of the primary association were „lowland plain” (and its alternatives like „flat land” „no mountains”, „Szeged”, the „River Tisza” and „Békéscsaba”. The expressions mentioned secondarily were similar with „the River Tisza”, „Gyula”, and „Szeged” on the top. Some negative associations like „boring”, „undeveloped” and „no marketing” also appeared but the rate of thoughts proving a positive opinion „green territory”, „village tourism” and „calmness” was the same.

Expressions often mentioned in the third place were again „Gyula”, „Gyula Castle”, „Szeged” as well as „Szeged pepper”, „fish soup” and „brandy”.

We think the results of the examination give us significant information about how well the south Great Plain is known and how it is judged by tourists. *It is obvious that although the cultural sights, unique gastronomic offers of the region are relatively well-known and acknowledged, the judgement on the region is still not homogeneously positive.*

We think these characteristics should be emphasized in the marketing of the region, nevertheless the fact mustn't be forgotten that this region is more than a lowland specialized in offering fish soup and red pepper.

Aiming at analyzing further the opinions and impressions about the Southern Great Plain Region we asked the participants to value some statements. According to this evaluation the most characteristic features of this region are the „types of accommodation at a reasonable price”, „family friendly surroundings” and „kind, hospitable inhabitants”.

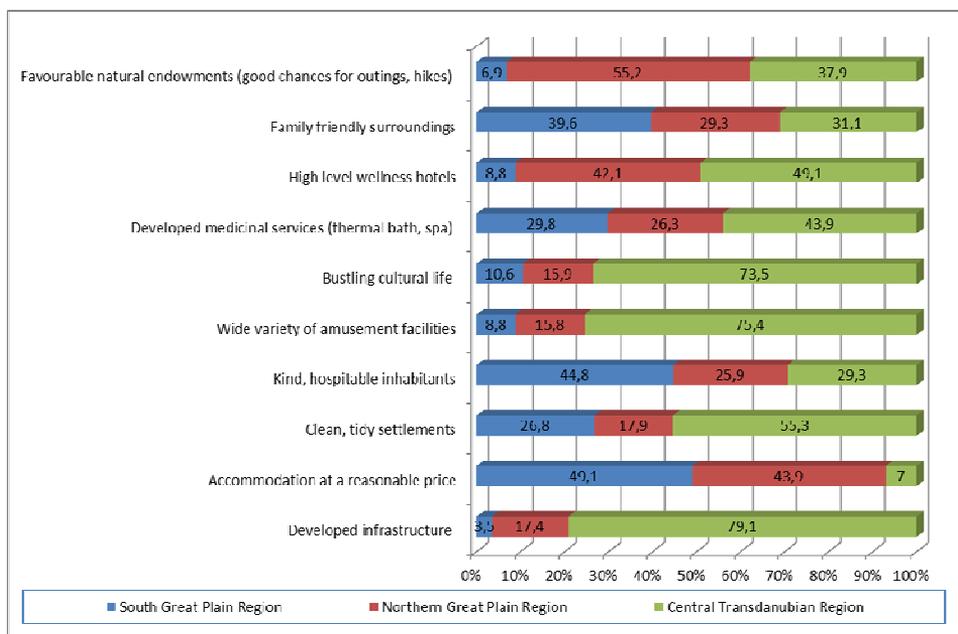
From the point of view of the region tourism it sounds especially negative that in the survey people’s opinion of the region has a considerable lot to develop regarding wellness services.

High level wellness hotels are the least characteristic of the region, and neither a bustling cultural life nor a wide variety of amusement facilities belong to the main attractive forces according to those answering.

Along the same characteristics we asked the participants to compare the Southern Great Plain Region with its two potential rivals, Mid-Transdanubia and North-Hungary (Figure 3).

Figure 3

Consumer opinion about the Southern Great Plain, Northern Hungary and Central Transdanubia (N=120)



According to the answers, Mid-Transdanubia is characterized by a bustling cultural life and a wide variety of amusement facilities, together with developed medicinal tourism and high level wellness hotels.

The main attractive forces of North-Hungary can be found in its favourable natural endowments and in the different types of accommodation offered at

reasonable prices, together with high level wellness hotels. The USP of the Southern Great Plain Region is accommodation at a reasonable price, kind, hospitable inhabitants and family friendly surroundings. We think it is important to state that apart from these three factors the Southern Great Plain Region was beaten by both of its rivals.

Considering the results it seems that the south Great Plain might be a good choice for price sensitive guests preferring family friendly, hospitable surroundings to a bustling cultural life and high level wellness services.

According to the survey, tourists seeing affordable wellness services can find attractive offers in North Hungary, where they can choose accommodation at a reasonable price and there are more possibilities for walking –tours and hikes, there are better natural endowments and more favourable wellness – and medicinal services than in the Southern Great Plain.

In our survey we followed the judgement on the Southern Great Plain as a wellness destination with special attention. In this sense we analysed separately how many wellness service providers (towns or exact hotels) of the region the participants were spontaneously able to name.

30% of the answering people named a service provider. The names mentioned most frequently rank as follows: Gyula, Szeged, and Tiszakécske. Several people also named the towns Békéscsaba, Gyoma and Kiskunmajsza.

We wanted to get to know how many people from among the participants had already visited this region, where exactly they had spent a wellness vacation and whether they had been satisfied with it.

Those who have already participated in such a program, mainly chosen Gyula, Szeged or Szarvas. Most of them (86%) would gladly visit these places again.

According to the research, it seems to be obvious that the level of wellness services is really good in the region. The low number of visitors could probably be caused by the fact that the region is not really well-known, not really well advertised. This would be one of the key areas that need serious attention.

CONCLUSIONS

Overall, if one compares the tourism situation in the Southern Great Plain region with the quite similar Northern Great Plain region or the even stronger region of Western Transdanubia, the following conclusions can be drawn:

1. The traffic conditions have a significant impact on tourism. The Southern Great Plain Region is one of the most difficult to reach areas, because of the quality of roads and the large geographical distances. It is also important to point out that the Romanians have spent more nights in the Western Transdanubia region than in the Southern Great Plains, which is in fact a neighbouring region.
2. The spas and hotels close to the borders of neighbouring countries can build upon the citizens' interest, but this alone is not enough. More needs to be provided, since the Romanian tourists have spent twice as many nights in the Northern region than in the southern.
3. The quality of the accommodation and catering can greatly affect the interest of the guests.

4. Although it is hard to prove by the numbers, but the sports, cultural programs, and various festivals mean significant attraction.
5. Finally, in the region the importance of marketing activities is non-negligible. Obviously, there are regions that should be given less attention, since they are better known, while in other regions much more energy must be invested, possibly the result to be proportionately smaller.

As the results of our basic research one can conclude that in the resort preference system, the most important elements include the quality, price, the resort's reputation as well as the resort's conditions (infrastructure, environmental, natural conditions).

The qualitative survey also demonstrated that if the level of wellness in comparison to foreign competitors is evaluated on the same level, only in terms of additional services do the domestic participants have a disadvantage.

It is important to point out that most of the answers paint a positive picture of the region, but each time there were also quite a few answers with a rather negative attitude. However, these relate to macro-dimensions - such as infrastructure, income and economic situation – and improving those would definitely not be the job of regional marketing experts and strategy.

It is likely that a better strategy is needed for convincing potential guests and the main focus of the marketing communication should be on such USP as friendly local citizens and affordable accommodation.

Based on the research it would be advisable to create a well positioned regional image, and a good regional marketing strategy. Both would most likely help boost the region's tourism services.

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Corresponding author:

Zoltán ÁRPÁSI

Szent István University

Faculty of Economic and Social Sciences, Marketing Institute

H-2100, Gödöllő, Páter K. u. 1.

e:mail: arpasi.zoltan@gtk.szie.hu