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FOCUS POINTS OF HEALTH TOURISM IN THE VIEW POINT OF CHANGING COSTUMER VALUES

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Abstract: In our study, effecting role of values on consumer’s buying decisions is going to be introduced in accordance with health tourism. Investigation of values has a highlighted role to predict future trends, because trends of consumer behavior are formed by values in several aspects. Furthermore, individual values reflect to subject’s lifestyle, purchasing behavior and decisions in connection with free time activities. Since the end of ‘80s results of social studies pointed out that, status fortifying and demonstrative aspect of consumption have been getting stronger. So, the changes of buying decisions are not based on the social stratum any more, but it represents the values of the individual with the growing effect of subject. Hence, values, expressing the subjective judgments of consumers, are the most precise predictors of long term social changes.

In our study mainstreams of health tourism are going to be evaluated on the basis of secondary data. Furthermore, we identify place of health among individual values and its role in consumer decisions. During the analysis, we use data of national representative research to determine the Hungarian society’s opinion and judgments in the viewpoint of health. Uni- and multivariate statistical methods are going to be used to get a wide view in accordance with the investigated topic.

Among our most important result, we define those consumer groups, in which health has a highlighted role in consumer decisions. We introduce lifestyle characters of these segments and determine their special needs in connection with purchased goods and services. This type of characterization makes it real to organizations of health tourism to develop a more effective marketing communication strategy and improve service features according to consumer needs.

Keywords: effect of values, trend of health tourism, consumer’s value based decisions

Introduction

Trends of health-tourism

In professional literature health tourism is divided into two dimensions (wellness-tourism and medical tourism). Customers’ buying goals and motivations are the basis of this separation. Medical tourism include visiting forms with medical motivations, while in wellness-tourism customers show the following buying goals: improve life quality, preventive healthcare (Figure 1). In our study we focus on trends of wellness-tourism, because this part of health tourism is strongly affected by values and lifestyle. So, values based service improvement could develop the customer market of wellness-tourism.

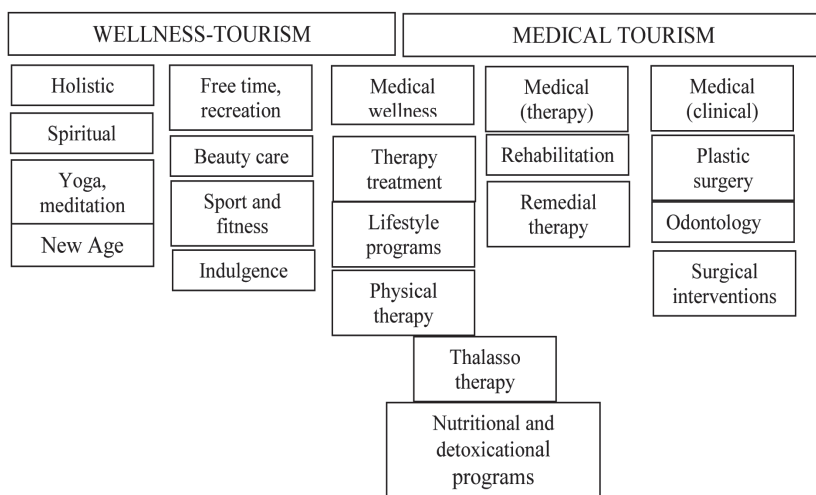


Figure 1. Dimensions of health tourism
 Source: Smith – Puckó, 2008 in Sziva, 2010, p 74.

Wellness is targeting to produce overall health (mental, physical, biological), and it is rather connected to a lifestyle change than an exact illness treatment. Hence, wellness services offer complex health-care programs and give people opportunity to get a deeper knowledge about health issues. Furthermore, it is available for quests in an attractive environment and in an amusing way (Rácz 2001). According to Global Spa Summit wellness tourism involves people who travel to a different place to proactively pursue activities that maintain or enhance their personal health and wellbeing, and who are seeking unique, authentic or location-based experiences/therapies not available at home. Wellness tourist: generally seeking integrated wellness and prevention approaches to improve their health/quality of life (GSS, 2011). On the basis of interpretations of this organization, aspects of medical and wellness-tourism are definitely separable and, in the continuum of enjoyment and authenticity, it can be divided into four dimensions (Figure 2).

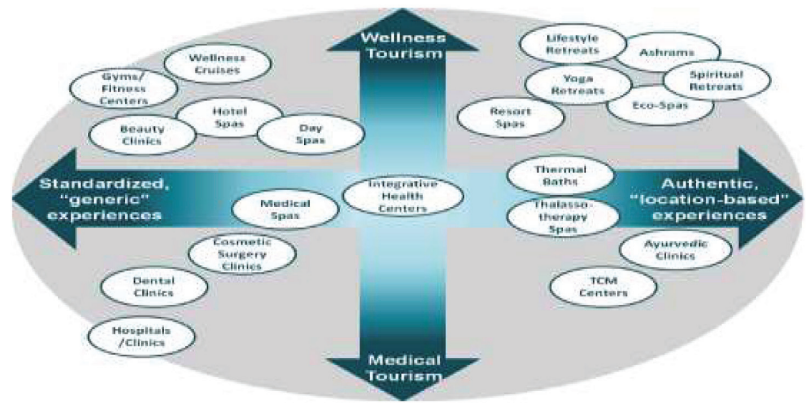


Figure 2. The Wellness Tourism and Medical Tourism Market Spectrum

Source: GSS, 2011, p 3.

Domestic touristic trends prove, role of health tourism improved among touristic motivations between 2009 and 2012. In this term, ratio of tourist with health touristic motivations rose with 3% (from 1.7% to 4.7%) (Hungarian Tourism Ltd, 2009-2012). On the other hand, role of medical and wellness-tourism went through a change within health touristic motivations. It is true, average length of stay was higher in medical tourism (2.9-3% between 2009 and 2012), but number of guests and number of guests nights were higher in wellness-tourism than in medical tourism. Parallel with it, capacity of commercial accommodations and gross income of commercial quarters increased in wellness-tourism between 2009 and 2012. Furthermore, since 2010, capacity of commercial accommodations and since 2011, gross income of commercial quarters have been higher in wellness-tourism than in medical tourism (Figure 3 and 4).

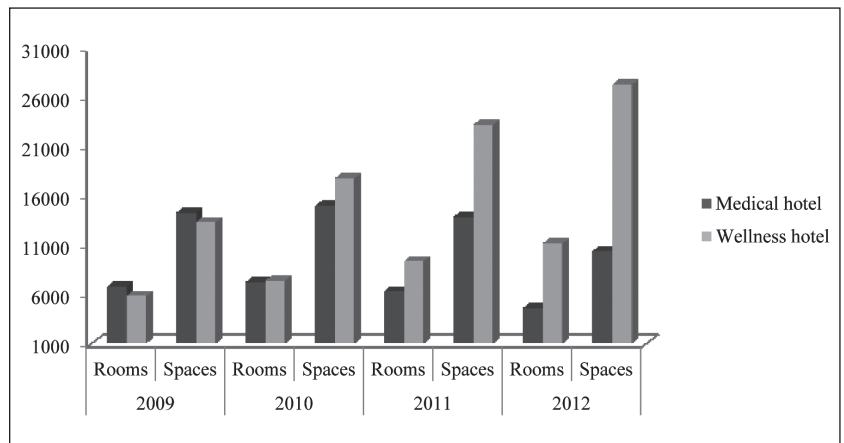


Figure 3. Capacity of commercial accommodations

Source: Magyar Turizmus Zrt., 2009-2012

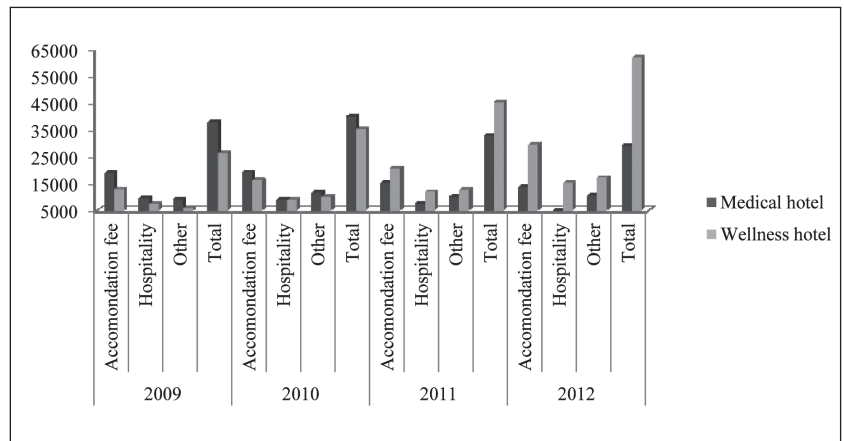


Figure 4. Gross income of commercial quarters

Source: Magyar Turizmus Zrt., 2009-2012

This type of restructuration of health tourism reflects to changes of customer values, hence, appearance of health conscious consumer group is a must. Nowadays, several researches prove that, among consumer motivations, health concerns are getting a more important role. In the following chapter, consumer trends connected to health consciousness are summarized to give a better understanding of health touristic trends.

Effects of health consciousness on demand of wellness-tourism

Results of food consumption behavior researches, carried out by Marketing Institute of Szent István University, prove, factors of Hungarian value system form three different groups: hedonistic/convenience values, traditional values and material

Table 1. Order of social values

Social value	Mean	Standard deviation	Social value	Mean	Standard deviation
Health	4.88	0.45	Economical well-being	4.24	0.83
Happy family life	4.82	0.52	More free time	4.07	1.01
Silent, peaceful life	4.56	0.73	Providence	4.02	0.93
Good human relations	4.71	0.67	Make the best of opportunities of life	3.95	1.00
Good social relations	4.43	0.74	Travelling	3.58	1.13
Self-confidence	4.42	0.80	Carrier	3.47	1.13
Joyful, pleasurable life	4.25	0.86	Religion	2.89	1.31

Source: BERKE SZ. (2004)

values. Furthermore, investigations between 2002 and 2004, pointed out that, the most important values of Hungarians are the follows: peaceful, happy family life; good relations and health. Material concerns only appear after these (Horváth et al. 2005).

Results above are enforced by other scientific studies and it is also demonstrated, health, as social value, has a highlighted role in Hungarians daily life (Table 1) (Berke 2004).

TNS Hungary examined Hungarians' overall health statues with the aid of national representative research in 2007. For this reason, the company developed six indexes, which could reach values between 0 and 100. From the mean of the six indexes Béres Egészség Hungarikum Index (Béres Health Hungaricum Index) was calculated, which measured the overall health conscious of Hungarian society. Results show that, although, we were not conscious about health, we thought that, we were well informed about health issues. A high ratio of Hungarian society stated, we would have had a chance for healthy lifestyle, even though, health concerns were not characteristic in activities. Furthermore, results proved, we thought ourselves more healthy than the overall health of Hungarian society (Radnai-Illyés 2007). The Szinapszis Egészségügyi Piackutató Ltd. got similar results in 2008. They explored, Hungarian society was poor knowledge about health issues and only 37% of the society show proactively interested in personal healthcare. According to demographical characters, it could be said, 41% of people younger than 25 years old looked for information connected to health prevention (this ratio was 60-70% among people between 25 and 70 years old). On the other hand, higher education generated a deeper health information seeking behavior (Kiss-Kertész 2008).

The Millward Brown Healthcare and the TGI (Target Group Index) division carried out a common research among Hungarians between 14 and 69 years old in 2010, in which they investigated health consciousness of Hungarian adults. Main result can be summarized as follows (www.medicalonline.hu 2010):

- Preventive lifestyle was characterized by only a small fraction of Hungarian society. For the biggest part of Hungarians, importance of health had got an essential meaning only if it was in danger.
- More than the half of adults thought, they did not need to do more to promote their health statues.

- Only the half part of the society stated, they could influence their health statues.
- 20% of the society had complex health promoting techniques. It was more meaningful among women, residents and people from higher social classes.
- Long term health promotion was less dominant among younger subjects. Health concerns rather connected to personal appearance. In this case, young men, who regularly do sports, were the most open-minded group in the viewpoint of health consciousness.
- Middle aged generation did very little health promoting activities, if they did not notice health problems.
- Elderly people with low education, from rural areas (28-30%) were almost totally uninterested in decadence of their health statues.

As a summary, we can say that, need for a healthy lifestyle has appeared in the Hungarian society, but only a small part of Hungarians' acts meet the requirements of healthy lifestyle. They are mainly residents and come from higher social classes.

This consumer typology is parallel with segmentation results of wellness-tourism market. According to different researches, customers of health tourism can be characterized with the following socio-demographical factors (Michalkó et al, 2011; Walter 2006; Laczkó-Rébék Nagy 2007):

- they come from 18-29 and 40-49 age groups,
- high and middle educated,
- they come from the chief town of counties,
- they belong to the upper and upper-middle income quartiles,
- they come from A and B social classes.

Among customer motivations relaxation (71.0%) and health promotion (21.5%) are the most typical (Laczkó-Rébék Nagy 2007). Moreover, Laczkó-Rébék Nagy (2007) explored six customer segments of wellness-tourism market among customers from Southern Transdanubia. From these six segments the following three can mean potential target groups of wellness-tourism: (1) sport orientated (28.4%) – primary motivation is active relaxation; (2) busy, rushed – a fifth of customers, primary motivation is relaxation; (3) health- and environmental conscious (28.0%) – complex wellness programs. Walter (2006) also divides into six segments the market demand of tourism. From these segments two can be highlighted in the viewpoint of wellness-tourism: price

sensitives (7.0%) and opinion leaders (36.0%). For these two segments relaxation is also important, but they take into account environmental viewpoints during travelling. Healthy nutrition and tradition are essential for them, but they seek for variety at the same time.

Both, trends of health consciousness and characters of customer groups defined by wellness demand researches show that, nowadays, exploration of value based lifestyle segments and develop marketing activities according to these principals is more important than socio-demographical characters based segmentation. In our opinion, on the basis of the latest consumer trends, customer groups with health and enjoyment seeking motivations come into the front in the wellness-tourism market. Nowadays, this hybrid lifestyle is typified by LOHAS (Lifestyle of health and sustainability) consumer segment.

International literature introduce LOHAS as follows: they are quality orientated, health consciousness and sometimes, they have an unusual interest in effects of products and services on environment and social justice ("moral purchases"). They accept higher prices (Kreeb *et. al* 2008). Most crucial factors of them attitude are environment, society and corporate social responsibility. They are innovators, they can influence opinion and purchasing decisions of them family and friends and they are loyal to brands (French-Rogers 2006). LOHAS consumer developed a hybrid lifestyle, in which different characteristics associate with each other. These, partly contrary attributes, describe the strongly value orientated lifestyle of new ethical consumer (Schulz 2008).

During our research, we define Hungarian value based lifestyle segments to develop wellness-touristic demand. Exploration of the needs of new customer segments, we can define market gaps. These gaps can be potential growing factors, if development of wellness-touristic supply meets new customer needs.

Materials and methods

In our study we introduce results of two national representative researches. The first was carried out in 2011. Goal of this investigation was to identify the domestic sustainability committed consumer groups. This representative research is supported by a quantitative investigation, in which five theoretical values dimensions were explored: environmental consciousness, health consciousness, ethical values, authentic values and individualism. During quantitative research, with the aid of a statement list, appearance of theoretical dimensions among Hungarians was tested. After it we formed value based lifestyle segments. The second data gathering was carried out in 2013. Goal of this research was to explore that, how appears sustainability in everyday life of Hungarians. Sample size was 1015 subjects in 1011 and 1038 subjects in 2013.

Data was gathered in the frame of Omnibus 2011 and 2013 researches carried out by Cognitive Market research Ltd. Data was collected with the method of strict random walk, on the basis of layered sampling, which was formed according to settlements and counties. During collection

111 sampling points were used. Subjects were elected according to the birthday key. Data was weighted on the basis of Microcenzus 2006 of KSH with marginalities of age, gender, education, region and settlement. Hence, sample is representative according to the mentioned weighted variables. Data was analyzed with SPSS 16.0 software. During the analysis we used descriptive statistics and also bi- and multi-variable statistic, in which cross-table, variance-, factor- and cluster analysis (k-means) were calculated. During factor analysis, we also investigated the skewness of factor scores to understand better the influencing role of value system. As we used standardized numbers, negative value of factor scores, which were measured with the aid of five stepped scale (1 – totally not true, 5 – totally true), means that the distribution is skewed to the right (so it is rather true), while positive values means the distribution is skewed to the left (so it is rather not true) (Székelyi-Barna 2008).

Among the explored consumer segments we highlighted those, which represent market gaps nowadays. So, these segments are growing factors in wellness-touristic market. In our study we also calculated the purchasing power of new market segments to define the reachable income growth, if development of supply structure meets customer needs.

Results and discussion

At first, we introduce results of research, which was carried out in 2011. We used factor analysis to test theoretical values dimensions. Our results proved, dimensions, discovered with qualitative research, appeared in value structure of Hungarians. It is true, quantitative results show a bit different structure, because of the construction of health- and environmental consciousness and ethical values. Compared to the theoretical structure values, connected to health- and environmental consciousness formed one factor, while ethical values separated into two factors: ethical (competence) values and ethical (corporate behavior) values. In this case, ethical (competence) values represent subjects' ethical acts, which appear in the everyday life (for instance donating, volunteer work). Ethical (corporate behavior) values include factors, which connected to corporate social responsibility (for example fair work conditions and charity).

Investigating skewness of factor scores, we identified that Hungarian consumers considered ethical (competence) values as the less crucial for them, compared to the other dimensions. On the other hands, ethical (corporate behavior) values, authentic values and health- and environmental consciousness values were really important for the subjects. Importance of individualism was between these two side points. It was less essential than health- and environmental consciousness, authentic values and ethical (corporate behavior) values, but more important than ethical (competence) values.

After we had identified the values dimensions of sustainability, we did values based lifestyle segmentation with the aid of cluster analysis. According to the sustainable value system five lifestyle segments were defined: (1) Elderly, health

conscious (17.0%), (2) Trend followers (21.0%), (3) Health- and environmental conscious patriots (27.0%), (4) Unconcerned (19.0%) and (5) Disappointed pessimistic (16.0%). Out of these groups, “Trend followers” represents the potential market of goods and services produced in a sustainable way. Lifestyle characters of “Trend followers” can be defined as follows: health- and environmental consciousness, both ethical (corporate behavior) and ethical (competence) values are important for them. Furthermore, authentic values play an essential role in them lifestyle and they are the most individualistic consumers. According to socio-demographical characters high (35.1%) and high-middle (32.0%) social class, households with net monthly income over 100,000 HUF (33.9%) are over represented in group of “Trend followers”. In accordance with age groups ratio of 15-24 years old subjects is dominant (30.8%), while proportion of subjects over 65 years old is only 9.0%. On the basis of settlements, metropolitans (29.0%) and residents (25.9%), according to regions, the Central-Region (include the capital city) (31.4%) and Northern Great Plan (31.0%) are over represented. Dominance of high and middle educated subjects (29.0% and 33.6%), who are active workers (26.2%) is definable. In accordance with occupation independents/self-employed (42.9%), white collar workers (33.7%) and students (36.9%) appear in the group. Investigating consumers commitment to sustainability (index of Cognitive Ltd), “Trend followers” is characterized by middle (32.7%) and high (37.6%) commitment, while not committed subject are strongly underrepresented in the group (10.6%).

According to results of investigation carried out in 2013, Hungarians’ sustainable acts in daily life form a structure as Table 2 represents. Factor 1 (explained variance 22.20%) includes innovative lifestyle and technological elements and factor 2 (explained variance 15.62%) contains elements connected to sustainable food choice and use. Factor 3 (explained variance 6.11%) represents the sustainable self-farming, factor 4 includes (explained variance 3.55%) the energy saving ways with low inputs and factor 5 (explained variance 3.15%) reflects to alternative way of transportation. Investigation skewness of factor scores, we can determine, alternative way of transportation (Skewness: -0.818) and sustainable food choice and use (Skewness: -0.422) come into the front in the Hungarian society, while innovative lifestyle and technological elements (Skewness: 1.072) are the less important factors in subjects’ way of life. Opinions connected to sustainable self-farming (Skewness: -0.100) and energy saving ways with low inputs (Skewness: 0.253) are between the two mentioned endpoints.

Table 2. Value order in the viewpoint of sustainable acts

Elements	Factor 1	Factor 2	Factor 3	Factor 4	Factor 5
I am on a vegetarian diet.	0.763	0.009	0.079	-0.023	0.027
I use separated device to measure consumption of household appliances with high energy need.	0.745	-0.108	0.183	0.076	0.039
I buy food stuffs from internet.	0.738	-0.028	0.091	-0.027	-0.100
I use alternative, sustainable energy developments.	0.722	-0.012	0.040	0.152	-0.004
I buy green energy from electrical suppliers.	0.717	-0.002	0.127	0.094	0.103
I build or rebuild a, so-called, half or totally passive house.	0.673	-0.049	0.165	0.244	-0.026
I aim applying electronic paying forms, if it is available, I ask for electronic invoice.	0.631	0.077	-0.069	0.171	-0.133
I use environmental friendly fuel for my car.	0.529	0.005	0.179	0.200	0.034
I increase the fruit and vegetables consumption, especially during seasons.	-0.023	0.699	0.024	0.110	0.072
I prefer seasonal foods.	-0.116	0.656	0.101	-0.062	0.023
I prefer locally grown and processed foods.	0.011	0.639	0.220	0.051	0.047
I reduce amount of food waste.	-0.036	0.635	0.131	0.085	0.171
I aim energy saving during cooking.	-0.150	0.577	0.121	-0.058	0.239
I increase consumption of poultry and fish.	0.241	0.575	0.021	0.153	0.079
I reduce the amount of food waste with planned purchasing, storing and stocking.	0.017	0.557	0.196	0.112	0.132
I grow a part of my food-stuffs.	0.136	0.200	0.670	0.003	0.051
I collect selective the waste from kitchen and garden and composting.	0.207	0.240	0.612	0.158	0.068
Instead of using fertilizers and pesticides I chose natural materials.	0.232	0.267	0.580	0.116	0.065
I build in thermo-isolated windows and doors.	0.332	0.163	0.091	0.781	-0.149
I isolate my flat or house.	0.287	0.189	0.167	0.718	-0.104
I chose bike or go on foot to do the shopping.	-0.145	0.181	0.012	-0.156	0.700
I use public transportation instead of car for longer travelling.	0.034	0.150	-0.021	-0.079	0.680
I use my car less to do shopping.	0.064	0.148	0.152	0.037	0.513

Extraction Method: Maximum Likelihood. Rotation Method: Varimax with Kaiser Normalization. Rotation converged in 6 iterations. KMO=0,884, Bartlett: (Approx. Chi Sq.) 10819,114 (Sig.) 0,000; Communalities: 0,255-0,745, Total Variance Explained: 50,625
Source: Own research, 2013, N=1038

On the basis of the value structure above, we identified six lifestyle segments:

Cluster 1: Innovator consumers committed to sustainability (20.40%),

Cluster 2: Low income survivals (20.33%),

Cluster 3: Easy-going conscious consumers (12.40%),

Cluster 4: Early-bird consumer committed to sustainability (11.60%),

Cluster 5: Individual unconcerned (17.92%)

Cluster 6: Path seeker inquisitive (17.82%)

In the viewpoint of sustainability cluster 1 and cluster 4 can be highlighted. Common character of them lifestyle is that, compared to the sample mean all of investigated sustainability motives are over rated by them. At the same time, importance of dimensions is different in the mentioned

consumer groups. So, innovative lifestyle and technology factor is the most essential lifestyle character of „Innovator consumers committed to sustainability”, while, in daily life of „Early-bird consumers committed to sustainability” the mentioned factor has a lower effect.

Investigating socio-demographical characters we can determine that “Innovator consumers committed to sustainability” definitely come from the 15-24 years old age group (22.6%) and they are middle (42.3%) and high (17.3%) educated. According to occupation professionals/managers (6.2%), white collar workers (38.9%) and students (15.9%) are over represented. Moreover, they are members of the high-middle and middle social classes (22.7% and 29.5%), who live in the capital city (30.3%) and their monthly net incomes per person is over 105,000 HUF (41.7%). “Innovator consumers committed to sustainability” have high sustainability commitment index (19.6%). Members of „Early-bird consumer committed to sustainability” are mainly between 51 and 64 years old and over 65 years old (35.5% and 25.6%), who come from the middle social class (32.2%) and live in the rural area (50.4%). According to occupation independents/self-employed (5.0%) and retired (43.8%) are over represented. The monthly net income per person is between 80,001 and 105,000 (36.0%) and they have middle (48.3%) and high (30.8%) commitment to sustainability.

Results of two independent researches prove that sustainability committed consumer group has appeared also in Hungary. These consumer segments have a strongly value orientated lifestyle. On the other hand, needs of explored consumer groups only partly satisfied nowadays. So, the new market segments represent potential growing factors for wellness-touristic products. In the last part of our study, we calculated of purchasing power of defined consumer groups. Purchasing power enforces that income of wellness-tourism could significantly improve with the aid of lifestyle based positioning strategy. According to data of KSH (Hungarian Central Statistical Office) customers spent 14,086,192 HUF/person for domestic travels in 2011, while this amount was 18,394,804 HUF/person in 2013. So, touristic purchasing power of “Trend followers” is over 25 billion HUF, “Innovator consumers committed to sustainability” represent 31.5 billion HUF market size and purchasing power of „Early-bird consumer committed to sustainability” is 18 billion HUF.

Conclusions and recommendations

In our study we introduced that conventional market segmentation based on social class is getting less efficient and identification of value based lifestyle segments come into the front. Value orientated lifestyle segment show big differences according to socio-demographical characters, but they have common purchasing motivations. In the introduction we determined, demand of wellness-touristic products strongly depends on lifestyle. So, exploring new consumer trends and consumer groups, market size could be significantly improved. To achieve it, naturally, we need correct consumer

classification and reconstruction of wellness-touristic supply to meet customers’ needs.

Nowadays, concept of sustainable consumption is one of the most essential consumer trends. Here, supply, formed on the basis of consumers’ needs, could result stable and returning guests. During our research, we introduced results of two independent national representative researches, in which we identified three consumer segments in the viewpoint of sustainability:

- Trend followers (21.0%),
- Innovator consumers committed to sustainability (20.40%),
- Early-bird consumer committed to sustainability (11.60%).

Common character of explored consumer segments is that, they have a kind of hybrid lifestyle. So, between enjoyment seeking and personal goals, social responses also appear in their purchasing process (for instance environmental protection, ethical behavior). Today, needs of identified consumer segments have been not totally satisfied. In this way, they represent potential growing factors in the wellness-touristic market. This opinion is enforced by purchasing power of new market segments. It proves that, if need of new groups is totally satisfied, domestic touristic incomes can improve with 18-27 billion HUF per year. We recommend the following actions to service providers to meet customers’ needs:

- develop services according to principals of sustainability (energy saving solutions, sustainability in food supply),
- quality orientated approach (to reduce price sensitivity),
- detailed information sharing.

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