

THE EFFECT OF WELLNESS BRAND AWARENESS ON EXPECTED AND PERCEIVED SERVICE QUALITY

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Enterprises in the tourism sector are being exposed to ever fiercer national and international competition and are confronted with difficulties in market positioning. One possibility for achieving differentiation on the market is high service quality and the creation of strong wellness brands. The aim of the present work is to investigate whether brands suggest a promise of quality that also appears to be especially important in wellness tourism. In this connection the study ascertains whether the brand awareness of wellness guests influences the perception of quality. The study also investigates whether demographic differences exist between brand aware and non-brand aware wellness guests. The results show that brands of wellness cluster are relatively weakly anchored in people's minds. There are demographic differences between brand aware and non-brand aware wellness guests. The existence of brand awareness raises the expected quality but not the perceived quality.

Keywords: *wellness cluster, brand awareness, SERVQUAL, wellness tourism*

JEL Classification: *L83, M1, O1*

INTRODUCTION

Falling numbers of overnight stays and increasing capacities in and between destinations during recent years, combined with the current economic uncertainties, are expected to lead to increased global and local competition in the tourism sector (Pikkemaat and Weiermair, 2006). One strategy for SMEs in the Alpine region to respond to these challenges involves increases in quality. In this way, new products and new services become a success factor in the differentiation process (Pikkemaat and



Weiermair, 2006), which, in the tourism sector, is also partly based on wellness products.

According to the logic of the Kondratieff cycles, the health market is considered to be a megatrend at the beginning of the 21st century (Nefiodow, 2001). According to the 2002 travel analysis, the wish for a wellness vacation increased by 125% during the period from 1999 to 2002 (Gruner & Jahr, 2002). Wellness enterprises in Austria register average growth rates of 20% - 30% per year (Best Health Austria, 2007). The members of the Deutschen Wellness Verbands (DWV) [German Wellness Association] also record a 20% average annual growth of turnover (Deutscher Wellness Verband, 2007).

Although the term 'wellness' is very often used in everyday parlance (Miller, 2005), it is still lacking in clear definitions and demarcations (Müller and Lanz-Kaufmann, 2001). 'Wellness products' are offered as products and services in a variety of areas such as cosmetics, foods, textiles, etc (Wagner, 2006). The term 'wellness' also faces the danger of being watered down further (Müller and Lanz-Kaufmann, 2001) by opportunistic elements that are not subject to any quality criteria or that use the term for products and services not covered by the narrower definition.

The danger therefore exists that wellness tourism will become a marketing label with little content and lacking in quality criteria (Ritter, 2005). Wellness clusters are intended to counter this trend by offering proven quality and by pursuing the selective building and positioning of trustworthy and strong brands (Steinhauser and Jochum, 2006). In connection with the difficult market positioning of wellness and the lacking in quality criteria, the building of wellness brands is becoming increasingly important. Incisively positioned brands can be understood as an indicator of a particular quality of service and can increase both the numbers of new users and the user frequency by reducing the subjectively perceived risk for the customer (Meffert and Bruhn, 1995).

In recent years the Alpine region has seen the creation of numerous wellness clusters intended to promote the exchange of experience, the organization of training and further training, and the creation of procurement syndicates in addition to the usual marketing activities. Numerous brands exist for these wellness clusters, for example 'Tirol Wellness', 'Welltain' (Vorarlberg), 'Alpine Wellness', 'Belvita' (South Tirol), 'Wellness Hotels Austria', 'Wellness Hotels Deutschland' [Germany], and 'Wellfeeling Schweiz' [Switzerland] (Müller and Lanz-Kaufmann, 2001).

The aim of the present work is to investigate whether brands suggest quality that also appears to be important in wellness tourism. In this connection the question arises as to whether wellness guests who are familiar with brands and consider these important demand higher standards of quality. This is analysed by means of brand awareness and using the standard approach SERVQUAL for measuring service quality. The SERVQUAL approach is used to determine whether differences between expected and perceived service quality vary between wellness tourists aware of brands and those who know no brands, and whether brands therefore exert an influence on customer behaviour. In this connection the aim is to determine whether the brand awareness of wellness guests influences the perception of quality. The study also investigates whether demographic differences exist between brand aware and non-brand aware wellness guests. The work further investigates whether correlations exist between the individual wellness cooperation brands.

BACKGROUND

Wellness Tourism

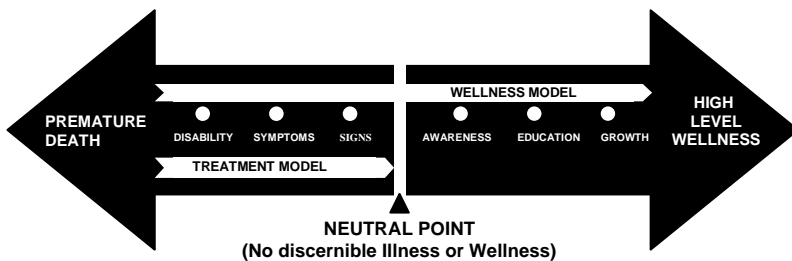
According to Müller and Lanz-Kaufmann the term 'wellness' encompasses a special conception of health (Müller and Lanz-Kaufmann, 2002). The WHO (World Health Organization) defines health as 'a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity' (WHO, 1948). In this connection the wellness concept must be clearly segregated from stays at health spas in the traditional sense, because the latter are intended to alleviate an existing medical condition.

The idea of wellness derives from the American doctor Halbert Dunn, who outlines it in his publication 'High-Level-Wellness'. Dunn defined the term wellness as follows: 'High-level Wellness is an integrated method of functioning which is oriented toward maximizing the potential of which the individual is capable, within the environment where he is functioning (...) High-level Wellness, therefore, involves (1) direction in progress forward and upward towards a higher potential of functioning, (2) an open-ended tomorrow with its challenge to live at a fuller potential, and (3) integration of the whole being of the total individual – his body, mind and spirit – in the functioning of process' (Dunn, 1959). Ardell took up Dunn's definition and, after several modifications, reached the conclusion that 'high-level wellness' consists of

the elements self-responsibility, nutritional awareness, physical fitness, stress management and environmental sensitivity (Ardell, 1977).

Travis used the health continuum illustrated in Figure 1, to observe the dynamic progression of wellness and described wellness as 'a state of being, an attitude and an ongoing process, not a static which we reach and never have to consider again' (Travis, 1984). The neutral point indicates that no discernible illness is present and that a low level of wellness predominates. The treatment model protects a person from premature death but can only lead them back to the neutral point (Lanz-Kaufmann, 2002). The wellness model, on the other hand, not only supports the healing of the disease, but also moves towards a higher level of wellness (Travis, 1984).

Figure 1 Health continuum according to Travis (Travis, 1984)



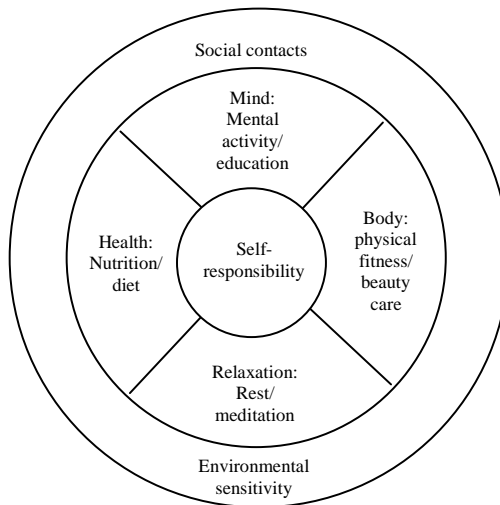
Lanz-Kaufmann summarized the term 'wellness' in accordance with Ardell's definition as presented in Figure 2: 'Wellness is a state of health in which body, mind and soul are in harmony. Personal defining elements are self-responsibility, fitness and beauty care, nutrition/diet, relaxation, mental activity/education, social relationships and environmental sensitivity' (Lanz-Kaufmann, 2002).

Lanz-Kaufmann stresses that the hotel industry must pursue the reform of existing marketing clusters. The range of wellness products must be directed consistently at target groups, provide qualified personnel, follow a credible wellness philosophy and be supported by professional communication (Lanz-Kaufmann, 2002).

Since the beginning of the nineties there has been a growing interest in industrial clusters and networks. Weiermair et al. conclude that firms in a wellness cluster have better access to employees and suppliers and can also reduce costs as a result of economies of scale, economies of scope and lower transaction costs (productivity). Innovations are implemented

more quickly and more economically. The entry barriers and risks for a new provider of services in the health system or leisure industry are lower within clusters than in isolated locations (new business formation) (Weiermair and Steinhauser, 2003).

Figure 2 Wellness elements according to Lanz-Kaufmann (Lanz-Kaufmann, 2002), based on Ardell (Ardell, 1977)



The brand as a promise of quality

The aim of brand management is to build strong brands (brand value, brand equity), which depend on the successful creation of an unmistakable brand identity (Haederich, Tomczak and Kaetzke, 2003). Brand awareness is a necessary condition for the success of a brand (Esch, 2005). Brand awareness can be defined as the strength of the brand in the consumer's memory and is measured in terms of the different ways in which a consumer can remember the brand (Aaker, 2002). Only if adequate brand awareness exists will a brand be considered in the purchase decision, an anchor created for embedding brand-specific associations, and familiarity and liking generated among the users (Esch, 2004; Didascalou et al, 2009). According to Aaker there are different levels of brand awareness that can be presented in the form of a pyramid. Passive brand awareness (recognition) at the first level exists if on being

shown individual elements of the brand (brand name, brand logo) the user recognizes something already perceived (Keller, 2003). If the user fails to recognize the individual elements of the brand, there is no brand awareness. The next level of the pyramid is active brand awareness (recall). Active brand awareness exists if on the mention of a product category the user remembers a brand without having been presented beforehand with brand-specific features. The next level (intensive brand awareness) contains those actively known brands occupying first place in the awareness scale. The highest level comprises dominant brands that occupy an exclusive position (Aaker, 2002), in other words, cases in which users remember only one brand in the particular product category.

The result of the evaluation and decision-making process in purchasing depends on the position of the brand in the pyramid. 'The higher the position of a brand in the brand awareness pyramid, the greater the probability that this brand will also be preferably bought' (Esch, 2004).

One of the challenges faced in building tourism brands and clusters is the intangible nature of services (Keller, 2003). Keller derives from this the conclusion that customers find it difficult to evaluate the quality of a service. According to Keller, perceptions of services derive from numerous associations and vary depending on how directly these relate to the quality of the actual service. The decision in favour of a service is often made away from the location where the service is provided. Brand recall is therefore deemed to be the decisive and important factor (Keller, 2003).

Service quality

Up to now it has not proved possible to create a definition of service quality that rests on sustainable principles and is generally accepted (Bruhn, 1996). 'Service quality is the capability of a provider to shape the character of a primarily intangible service requiring participation of the customer so as to meet specific standards based on customer expectations. It comprises the total of characteristics and features needed in order to meet a particular set of demands' (Meffert and Bruhn, 1995). According to Bruhn (Bruhn, 1996), a distinction must be made between two central approaches to defining quality. These are the product-based and the user-based concepts of quality. The product-based concept of quality regards the quality of services as the total, or level, of the existing characteristics, and focuses on criteria that are difficult to measure. The user-based concept of quality observes quality from the user's perspective and is

focused on the user's perception of product characteristics and services. If the SERVQUAL approach is used for measuring service quality, discrepancies can exist between the service quality expected by wellness tourists and the quality they actually perceive (Parasuraman, Zeithaml and Berry, 1988). A service quality study in Thailand hotels showed a positive correlation between the perceived service quality and the brand value (Vatjanasaregagul, L., 2007). In this connection the question is pursued as to whether wellness guests who are familiar with the brands demand higher standards of service quality.

METHODS AND INSTRUMENTS

The region Western Austria (Vorarlberg und Tirol) was chosen for the survey. Western Austria is located in an Alpine region. During the winter and summer months, hotel tourism is aimed at sporting activities such as skiing and hiking. In the low season (spring and autumn), the hotels attempt to position themselves by offering wellness products. This study involves wellness hotels that are members of wellness clusters and concentrates on the demand-side and customer-oriented point of view. The survey was carried out using standardized questionnaires. A total of n=104 wellness tourists visiting wellness hotels were interviewed during their visit between September and November 2008. The data were evaluated using the statistics program SPSS 16.0 and R 2.9.2.

Brand name awareness

The levels of brand awareness were ascertained by means of cued questions. Passive (cued) brand awareness was elicited by means of a recognition test in which the brand had to be recognized from a given set of wellness hotel clusters (Keller, 2005; Esch, 2004). Brand elements such as logos were not presented.

Perceived quality

Service quality was measured using the instrument SERVQUAL (Parasuraman, Zeithaml and Berry, 1988). The SERVQUAL approach is an instrument for the measurement and determination of service quality (O'Neill, 2001). The method focuses on the perceived service quality as a discrepancy between the service expected and the service experienced. Questions were put in two stages. Using 22 items, the expected service (expectation statement) was queried first, followed by the service

experienced (perception statement) (Zeithaml, Parasuraman and Berry, 1992). The 22 items were reduced by Zeithaml to the following five SERVQUAL dimensions:

- Tangibles: physical facilities, equipment, and appearance of personnel
- Reliability: ability to perform the promised service dependably and accurately
- Responsiveness: willingness to help customers and provide prompt service
- Assurance: knowledge and courtesy of employees and their ability to inspire trust and confidence
- Empathy: caring, individualized attention the firm provides its customers (Zeithaml, Parasuraman and Berry, 1992)

This survey was performed using a seven-level scale from 1 (do not agree at all) to 7 (agree fully and completely). The questions were evaluated by the difference between expected service and service experienced from +6 to -6 (the respective differences between perception and expectation scores) (Zeithaml, Parasuraman and Berry, 1992). This index number indicates whether the customer's expectations of a wellness hotel are not fulfilled, or are exceeded.

RESULTS

The survey of passive brand awareness (brand recognition) revealed that 48.1% of the respondents (n=104) know none of the brands of wellness cluster listed, 17.3% know one brand, 18.3% know two brands and 16.3% know three or more brands. As shown in Table 1, the fraction of younger wellness tourists (<40 years old) knowing one or more brands (65%) is greater than the fraction of older wellness tourists (46.9%). More women (54.5%) than men (47.4%) know one or more brands. The number of brands known varies significantly depending on the location of the respondent's principal residence. The highest fraction knowing one or more brands is found among wellness tourists resident in Austria (64.7%), followed by the Swiss (53.3%) and German (18.2%) wellness tourists. The mean expenditure for a wellness vacation tends to be higher (by €46) for visitors who know one or more brands. Wellness tourists who know one or more brands take more notice of the wellness cluster brand when deciding on a wellness hotel (73.3%).

Table 1 Differences between no brand known and one or more brands known

		Wellness-Guests	
		No brand known (N=50)	One or more brands known (N=54)
Age	<40 (N=40)	35,0%	65,0%
	>40 (N=64)	53,1%	46,9%
Sex	Female (N=66)	45,5%	54,5%
	Male (N=38)	52,6%	47,4%
Nationality	DE (N=22)	81,8%*	18,2%*
	CH (N=30)	46,7%*	53,3%*
	AT (N=51)	35,3%*	64,7%*
Average Expenditures in € per person and year		950	996
Pay attention to the brand at decision		26,7%	73,3%

* Exact significance, $p = < 0.05$; DE = Germany, CH = Switzerland, AT = Austria

The best known brands are 'G'sund und Vital' [Healthy & vital] (35.6%), 'Premium Spa Resorts' (20.2%), 'Tiroler Wellnesshotels' [Tyrolean wellness hotels] (15.4%), 'Best Wellness Hotels Austria' (15.4%), 'Schlank & Schön' [Slim & beautiful] (13.5%), 'Alpine Wellness' (13.5%), and 'Welltain' (7.7%).

Some brands of wellness cluster exhibit significant mutual correlation in passive brand awareness, as shown in Table 2. The brand 'Welltain', for example, correlates with all other brands except for the brand 'Tiroler Wellnesshotels'.

Table 2 Correlation between individual brands

	Welltain	Tiroler Wellness hotels	Schlank & Schön	Premium Spa Resorts	G'sund & Vital	Best Wellness Hotels Austria	Alpine Wellness
Alpine Wellness	,309*	,144	,175	,293**	,295**	,300**	1,000
Best Wellness Hotels Austria	,277**	,040	,378**	,317**	,240*	1,000	

G'sund & Vital	,238*	,240*	,354**	,327**	1,000		
Premium Spa Resorts	,304**	,184	,153	1,000			
Schlank & Schön	,309**	,222*	1,000				
Tiroler Wellnesshotels	,077	1,000					
Welltain	1,000						

Service quality

The evaluations of the wellness tourists' expected and perceived service quality were totalled for each SERVQUAL dimension and the mean was calculated as presented in Table 3. The evaluation of the service quality using the instrument SERVQUAL revealed significant differences in expected service quality for the dimensions 'reliability', 'responsiveness' and 'assurance'. Wellness tourists who know one or more brands have higher expectations of a wellness hotel in the above dimensions. No significant differences were detected in the perceived service quality. With the exception of the dimension 'assurance', the SERVQUAL difference between the expected and perceived service quality revealed that there are no significant differences.

Table 3 SERVQUAL service quality

Expected service quality	Tangibles	Reliability	Responsive-ness	Assurance	Empathy
No brand known	23	31*	24*	25*	29
One or more brands known	24	32*	26*	26*	30
Perceived service quality	Tangibles	Reliability	Responsive-ness	Assurance	Empathy
No brand known	24	32	25	25	30
One or more brands known	25	32	25	25	31
SERVQUAL difference	Tangibles	Reliability	Responsive-ness	Assurance	Empathy
No brand known	0,86	0,34	0,58	0,26*	0,52
One or more brands known	0,87	-0,20	-0,20	-0,30*	0,76

* Exact significance, $p = < 0.5$

In addition, multifactorial variance analysis was used to investigate which main effects influence the expected and perceived service quality. The results of the variance analysis show that the influence of brand awareness is smaller than the influence of sex. Women have significantly higher scores than men for all five dimensions of perceived service quality. The influence of brand awareness appears as a trend. For the dimension “reliability” the subjects who respond with “no brand known” tend to have lower scores than those who had responded “one or more brands known”. The dimension “responsiveness” shows significant differences in brand awareness. Subjects who responded “no brand known” have significantly lower scores.

Table 4 SERVQUAL brand differences analysis of variance results of the effects of brand and sex on the level on the five SERVQUAL dimensions

		Expected service quality		Perceived service quality		Difference		
		no brand known	One or more brands known	no brand known	One or more brands known	no brand known	One or more brands known	
Tangibles	male	Mean	5.39	5.78	5.75	5.89	0.36	0.11
	female	Score	6.07	6.11	6.15	6.41	0.08	0.30
brand		1.966		2.262				
sex	F	11.082 **		7.319**				
Reliability	male	Mean	6.14*	6.21 .	6.11	5.96	-0.03	-0.26
	female	Score	6.28*	6.52 .	6.44	6.57	0.16	0.04
brand		3.527 .		0.153				
sex	F	4.384 *		10.356 **				
Responsiveness	male	Mean	5.83	6.14	5.58	5.99	0.02	-0.15
	female	Score	6.30	6.48	6.45	6.54	0.15	0.06
brand		4.636 *		0.843				
sex	F	10.888 **		12.126 ***				
Assurance	male	Mean	6.09	6.14	5.85	6.03	-0.24	-0.11
	female	Score	6.21	6.50	6.41	6.50	0.20	0.00
brand		3.842		1.054				
sex	F	4.276 *		10.420 **				
Empathy	male	Mean	5.76	5.89	5.63	5.81	-0.13	-0.08
	female	Score	5.94	6.10	6.18	6.38	0.24	0.28
brand		1.860		0.164				
sex	F	10.005 **		4.032 *				

. tentential, * sig. at .05 level, ** sig. at .01 level, *** sig. at .001 level, Note: Dimension scores were coded on a 7-point likert scale ranging from 1 "I don't agree" to 7 "I total agree".

DISCUSSION

Brand awareness of wellness cluster brands

A large part of the wellness tourists (48.1%) knows no brand of wellness cluster. Any tourist who knows one brand generally also knows other brands, as shown in the correlation matrix in Table 2. The wellness tourists can be basically divided into two groups: wellness tourists who tend to perceive the brands of wellness cluster and those who do not. Providers of services wish to create a distinctive image for themselves by means of the brand in order to achieve a favourable positioning among wellness tourists (Keller, 2003). If the brands are not perceived, they do not generate any positioning advantage. Thus the purpose of brand building by wellness clusters is to acquire wellness tourists for their brand and subsequently to bind these tourists to it. The basis for this is brand awareness.

The level of awareness of wellness cluster brands (one or more brands known) is relatively low (51.9%) in view of the fact that other individual tourism brands are already achieving higher values. Thus the regional destination brand 'Tirol' has an awareness level of over 90% in Austria and over 70% in Germany (Tirol Werbung, 2006). One of the main determining factors in connection with the brand equity is the brand awareness (brand name awareness). For example, the strongest brand of hotel cluster - 'Best Western Hotels' – has a passive awareness of 79% and an active awareness of 47%. The up-market brands of wellness cluster have passive brand awareness values from 1.9% to 35.6%. Compared with Swiss destination brands, which have a passive brand awareness among German tourists of 94% (St. Moritz), 82% (Lugano) or 73% (San Bernardino), the up-market brands of wellness clusters are relatively weakly anchored. In this context it must be pointed out that the Swiss destination brands were surveyed independent of target groups, in contrast to the present survey of wellness cluster brands.

Sociodemographic differences in brand awareness

Differences exist in respect of sociodemographic characteristics. Younger wellness tourists (age <40) tend to know one or more brands (65%). Only 46.9% of the older wellness tourists (age >40) know one or more brands. Differences in brand awareness exist between the individual brands. There are brands of wellness cluster that are known more to

younger wellness tourists (age <40) and others that are more familiar to older wellness tourists (age >40).

The tendency for the share of market awareness to be higher among female wellness tourists allows the conclusion that they perceive brands more strongly than do male wellness tourists.

Brand awareness differs significantly depending on the location of the principal residence. Of the Austrian wellness tourists, 64.7% know one or more brands, compared with 53.3% of the Swiss and 18.2% of the Germans. The most important regular markets (multiple responses) in wellness tourism are the home market in Austria (97.7%) and Germany (91.5%), followed by Switzerland (53.1%) (Bässler, 2003). Germany, as the second most important regular market, is with 18.2% significantly weaker in terms of brand awareness (one or more brands known). However, caution is indicated in interpreting the above figure in view of the small number of cases (n=22).

One benefit of brand policy is the possibility of establishing a price premium (Tomczak, Schlögel and Ludwig, 1998). The basis for this is brand loyalty, which can exist only as a result of a strong market positioning (Aaker and Jochaimsthaler, 2001). Brand-loyal wellness tourists are not as concerned about the price (Krishnamurthi, 1991). The average expenditure by wellness tourists who know one or more brands tends to be € 46 higher than for wellness tourists who do not know any brands. There is a trend towards a price premium among individual up-market brands of wellness cluster, but this is not significant.

Preference formation is one of the main uses of a brand (Keller, 2005). In the decision in favour of a wellness hotel, the brand will tend to be taken into account more strongly if brand awareness exists (one or more brands known). Among the wellness tourists who know one or more brands, 73.3% take the brand into account on deciding for a wellness hotel. In contrast, wellness tourists who do not know any brands tend to take less notice of the brand (26.7%).

The hotels regard the initiation of cooperative activities more as image improvement, which is mainly considered with popular brands as marketing strategy (Weiermair, 2008). In the course of a survey, hoteliers were asked which clusters benefit them the most. Only 3-11% of the respondents named individual wellness clusters from which they benefited the most. The level of awareness is stated to be one of the most important criteria for choosing a cluster and therefore plays a significant role (Weiermair, 2008).

Influence of brand awareness on service quality

Measurement of service quality using the instrument SERVQUAL reveals that wellness tourists who know one or more brands have higher expectations of service quality in the dimensions 'reliability', 'responsiveness' and 'assurance'. Perceived service quality does not differ between wellness tourists who do not know any brands and those who know one or more brands. Regarding the differences between these two groups, the dimension 'assurance' shows a significant negative value while the dimensions 'reliability' and 'responsiveness' show a negative trend. Wellness tourists who know one or more brands expect higher service quality. However, these wellness tourists do not perceive the service quality as higher. The influence of brand awareness on the expected service quality is smaller than the influence of the sex of the subject. Women have higher demands than men in all five dimensions of perceived service quality. The influence of brand awareness exists as a tendency. In the dimension "responsiveness" the subjects who respond "no brand known" show significantly lower scores.

The higher the expectations of the customer, the more weakly he or she evaluates the perceived service quality (Boulding, Karla, Staelin and Zeithaml, 1993). The study by Alèn reaches the conclusion that among the spas in Galicia (Spain), there is a positive but not significant difference between the expected and the perceived service quality. The study also shows that significant differences exist between private persons and persons participating in social programmes. Thus private persons have higher expectations of service quality. Wellness clusters are urged either to lower the expected service quality or to improve the intended performance in order to exert a positive influence on the perceived service quality (Bruhn, 2001).

Quality is a decisive factor in the internationally advertised wellness market in meeting the high expectations held by wellness tourists (Müller and Lanz-Kaufmann, 2001; Magdalini and Paris, 2009). 'Perceived quality' is mostly a key positioning dimension for corporate brands. In this connection the perceived quality is of greater importance than purely functional quality criteria (Aaker, 2002). Acceptance of a wellness hotel into a wellness cluster must include the fulfilment of quality criteria, which mostly contain functional quality criteria. As a result of the quality criteria of the individual wellness clusters, the brands of wellness cluster are currently focused to only a limited extent on perceived quality, which could have a positive influence on the brand equity.

CONCLUSIONS

The result shows that because of the brand awareness of 51.9% (one or more brands known), brands of wellness cluster are relatively weakly anchored in the minds of users and that none of the brands enjoys intensive brand awareness. However, in addition to other factors, above all sex, the brand awareness of wellness cooperation brands has a significant influence on quality perception. If brand awareness exists, the expected service quality is higher, but the perceived service quality is not. Brands of wellness cluster tend to be better known by younger (<40 years old) wellness tourists (65%) and by female wellness tourists (54.5%). The average expenditure by wellness tourists who know one or more brands tends to be € 46 higher than for wellness tourists who do not know any brands. The brand tends to influence the decision-making process, but not significantly.

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