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WELLNESS TOURISM: INTEGRATING SPECIAL INTEREST TOURISM WITHIN THE GREEK TOURISM MARKET

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Tourism industry in the past two decades is increasingly subsuming the identity of an experience industry. Within the framework of the global crisis, Greece seeks for a way of rejuvenating, differentiating and upgrading in quality a "tired" tourism product within a broader framework of an enriched tourism product in terms of special interest tourism development- either as a core product or as a complementary product to the mass tourism model. In particular, wellness tourism in Greece, following the tradition of the past - which related to the traditional spa- towns-presents a dynamic revival and claims its position in the global tourism market. This paper examines the typology and potentials created through investing in special interest tourism and in particular in the dynamics of Wellness Tourism development in Greece. It examines the main characteristics and typology of a major part of the supply side of the wellness tourism market in Greece. It tries to identify the possible relation of wellness tourism to other special interest tourism types that could support the development of a complex of special interest tourism activities. It aspires to identify the consumer behaviour /

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motives of the tourists visiting wellness hotels in Greece in order to relate them with the need to invest in rising markets and new ways of wellness tourism marketing management and finally, presents some of the most important problems the Greek wellness tourism market encounters that must be addressed in order to escape form the crisis vortex.

Keywords: *special interest tourism, wellness, wellness tourists' typology, wellness tourism product typology, motivation*

INTRODUCTION

Greece, a traditional sea and sun destination, mainly dependent on mass tourism development became significantly vulnerable against the global tourism market crisis in the last 5 years. In 2012, Greece held 2,9 % of the European Market and 1.5 % of the Global one, with 15,5 mil. tourists visiting Greek destinations resulting in 10 bil. euros in tourism receipts. The crisis vortex has influenced the competitive advantages of Greece positioning it in the 17th place in Global arrivals' classification and 23rd in terms of receipts (losing almost 6 positions since 2000) (SETE, 2013). In addition to that, the problem of seasonality is persistent (56% of arrivals concentrated in July-September period) enhancing the pressure upon resources and raising cumulative carrying capacity and sustainability issues (as far as local economies, societies, the environment and culture are concerned).

Under such stagnating circumstances, Greece seeks for a way of rejuvenating, differentiating and upgrading in quality a "tired" tourism product with considerably strong competitors. Sustainability issues rise not only because the previous model in economy terms is failing, but also because the demand side of the market is increasingly seeking to be persuaded about the sustainable character of the development in visited destinations, focusing in special interest tourism in a way that travel industry can "subsume" the identity of an experience industry (Opaschowski, 2001 as found in Trauer, 2006:183).

More tourists seek for an optimal experience within the time constraints of their holidays (Trauer, 2006) that will offer material and immaterial qualities as well as emotional stimuli. The modern, multi-motivated, experienced and better informed tourist (Tsartas, 1996) is trying to satisfy increasing and multiple needs during the travel experience relating more and more to the Special Interest Tourism (SIT) phenomenon within a broader "sustainability" and "responsible /ethical tourism" framework (Vasileiou and Tsartas, 2009)

LITERATURE REVIEW

Special Interest Tourism (SIT)

WTO in 1985 has defined SIT as "the provision of customised leisure and recreational experiences driven by the specific interest of individuals and groups". Additionally, it is derived that SIT can be distinguished by the existence of a special and dominating motive/interest (or group of motives) - as far as demand side is concerned - and by the development of special infrastructure at a destination - as far as the supply side is concerned. Finally, SIT is often considered as active tourism during which a person engages in a cultural, artisanal or leisure activity or sport in order to develop his/ her personality (WTO, 1985, Kokkosis and Tsartas, 2001).

SIT, due to its nature -whether it is seen as an alternative to saturated mass tourism development strategies (Farsari and Sotiriades, 2012), or as a special product driven from special motives and resources- it can fundamentally be connected to sustainability issues, serving long term tourism planning and respecting carrying capacity, mostly because it can develop in human scale, in accordance to the environmental and social structure.

Wellness Tourism (WT)

WT is considered to be the sum of all relationships and phenomena resulting a journey and residence of people whose main motive is to preserve and promote their physical, mental and psychological health and their social prosperity. They stay in a specialised resort which provides the appropriate know-how and individual care. In addition they require a comprehensive service package comprising physical fitness, beauty care, healthy nutrition, relaxation, meditation and mental activity/ education and environmental sensitivity and social contacts (Mueller & Kaufmann, 2001). WT is considered to be a part of a more active lifestyle. The nature of demand for WT/spa tourism is changing as important social factors are changing, with worsening living conditions in polluted metropolitan areas, unhealthy life styles, increasing stress and ageing of the earth's population, but also increasing awareness on ecology, life and health improvement (Kaspar, 1990).

The wellness industry encompasses everything from spa, food and nutrition, complementary and alternative medicine, to active-aging, and fitness, to workplace wellness, medical and wellness tourism (WTW, 2013)

The global spa/ WT industry has increased exponentially in both volume and value, corresponding with the upward trend for health and wellness products in the last 20 years (ISPA 2012, Global Spa Summit, 2009). This is over time thoroughly confirmed by the fact that modern tourists tend to highly prioritise the need for wellness/ spa/ health treatments. Eurobarometer survey (2013, p. 6) states that 12% of the European travellers define wellness/ health treatments as a main reason for travelling. Despite the spike in demand, the industry remains highly fragmented (Mintel, 2007) with a plethora of products claiming the ultimate wellness experience within a confusing array of brands, treatments and formats it expands towards two directions: a)investing in luxurious facilities and treatments to attract the elite of the tourist market. b) investing in a new breed of discount spas, spa resorts, signature spas and spa chains are offering treatments at comparatively lower prices in order to attract middle or lower class tourists or younger ones (teenagers etc.) The latest trends in the international WT market indicate that WT organisations are seeking and testing new distribution channels (i.e. through intermediaries such as specialised tour operators, specialised webpages/ portals, consortia or voluntary chains etc.) in order to achieve lower cost, better and quicker access to the target market, increased sales, reduction of the business risk (ISPA, 2011, SETE, 2012, Cohen and Bodecker, 2008).In some cases though, many tourism destinations and companies choose the direct delivery of their products in order to have a more effective overall control over their product with minimised cost.

Due to its nature the WT market can relate to mass tourism or SIT development, either as a new high quality product that will act complimentarily to the core products or as a core product, especially in destinations such as traditional spa towns.

METHODOLOGY

The paper presents results of a doctoral thesis' research, focusing in Special Interest Tourism and in particular in the Greek Wellness Tourism Market. It aims: i) To identify the main characteristics and typology of a major part of the supply side of the Wellness tourism market in Greece. In particular, it examines the strategies of 4* and 5* hotels in Greece in terms of a) structuring the offered wellness tourism product, b) relating it with other special interest tourism or mass tourism activities/ markets. ii) To identify the possible relation of wellness tourism to other special interest tourism types that could support the development of a complex of special interest tourism activities for an enriched and competitive tourism product. iii) To identify the consumer behaviour / motives of the tourists visiting wellness hotels in Greece in order to relate them with the need to invest in rising markets and new ways of wellness tourism marketing management. iv)To present some of the most important problems the Greek wellness tourism market encounters that must be addressed in order to escape form the crisis vortex and minimize its effects, re-inventing its competitive advantage, away from its stagnating stage.

Because of the topic of wellness being complex, multidisciplinary and new for tourism, the study (part of a PhD research) is a combination of three types of research. It is descriptive, causal (explanatory) and at a degree it is an exploratory (and rather evaluative) one (Veal, 2006:3, 36-37). The triangulation (interdisciplinary) methodology is being used as convergent validation was necessary in order for the "criterion of validity to be met" and there is integrity as far as the drawn inferences are concerned (Schwandt, 1997, p.163), avoiding any personal or methodological biases and enhancing study generalizability (Decrop, 1999).

Quantitative research was used to quantify aspects of social life and to describe phenomena through statistically processed data. It can provide tools for measurement, causality between variables and phenomena, generalisation, and in some cases replication of findings (Veal, 2006:22-27, Schwandt, 1997:129-131). It is also important to use a methodology that will allow the researcher to describe the social phenomena by forming ontologies and relationships between them. The tools for this can be supplied by qualitative research.

The tools (qualitative and quantitative) selected include a) interviews with 14 key informants b) a structured questionnaire for 72 wellness hotel (4*-5*) managers from several destinations in Greece and c) a structured questionnaire for the 369 wellness tourists visiting 4*-5* wellness resorts. The research took place in 2008-2009 in traditional destinations such as Macedonia (Chalkidiki and Thessaloniki), Crete, Dodekanese, Cyclades, Lefkas, Athens and Central Greece, where 66% of the hotel supply is concentrated.

The SPSS (IBM statistical package) was used to analyse the data gathered from the cluster of the surveys, descriptive and statistical analysis was established, in particular univariate (means, percentages), bivariate (chi-square) and multivariate (factor) analysis. The NVIVO software was used in order to form a synoptic picture of the key informants' statements.

RESULTS

Wellness Tourism Product typology *(as seen from the supply side)*

Table 1. Wellness Tourism Product Typology in 4*-5*WT Greek resorts		
WT Services offered … Mainly as a complimentary product to mass tourism or SIT packages.	10% at an exclusively WT resort 50% as part of a mass tourism package 40% complimentary to other SIT services	
Offered WT Services (% of hotels) Resorts invest mainly in aesthetic pampering, hydrotherapy, sport and massage facilities following the most popular trends in the international market- (already tested SIT trends) (Global Spa Summit, 2009).	90% Aesthetic pampering 67% Hydrotherapy 65% Day spa treatments	25% Thalassotherapy 17% Healthy diet 14% Clima-therapy 10% Medical

As far as the SIT is concerned the fact that alternative treatments are gaining ground, improves the notion that the supply side is "responding" to the expansion of special interest focused in experiences' market. In general resorts invest in responding in dominating and rising trends/ services which relate to a plethora of SIT activities	64% Sports activities 39% Massage 31% Alternative treatments	Services 6% Preventive care 4% Balneary Center
Offered SIT Services The offered SIT services correspond firstly to traditional / recognised resources (such as Culture, Nature, Sports and Religion) with which Greece has an established image/ brand in the tourism market, and secondly to rising trends (such as Conference, Business, Adventure Tourism)	18, 2% Cultural tourism 0,6% Eco-Tourism 11,3% Trekking 21,4% Conference Tourism 13,2% Religious Tourism	18,2% Sports Tourism 1,3% Agrotourism 1,3% Mountain tourism 5,3% AdventureTourism 1,3% Casino Tourism 3,8% Business Tourism
Hotel Strategies relating to SIT - Collaboration with other SIT organisations The findings prove the fact that SIT can encourage the creation of networks and clustering, engaging maximum number of stakeholders in a common goal, a fact that is one of the basic principles of sustainability, diffusing profits in the local community	39% No collaboration 42% Collaboration with other SIT specialized companies 19% Collaboration with specialized local authorities	
Source: Author's fieldwork		

Resorts offering WT services in Greece follow the international trends with a certain delay (in order to safely recognize an established international dynamic). Out of 144 4*-5* wellness resorts (Hellenic Hotel Chamber, 2007), 72 (46% 4* and 54% 5*) agreed to participate in the survey, answering close-ended questionnaires. Table 1 above presents in summary the most important findings (as frequencies).

Wellness Tourists' Typology

a) Demographics- Consumer behaviour

The demographic profile and the consumer behaviour profile of the wellness tourists in Greek resorts follow the international market. In particular, it addresses mainly to middle aged people of higher education and economic status. The dynamics of the market focus in new younger age groups seeking signature treatments and new experiences as well (Smith and Puczko, 2008). In general, a complex enriched experience is sought with a personal seal to the chosen services. But they still remain a fragile market, a fact enhanced by the global economic crises: according to Eurobarometer (2011) 27% of European travellers state that the first group of activities they would reduce most to save money would relate to beauty/ wellness treatments. Table 2 provides a summary of the basic Demographic and Tourists' consumer behaviour characteristics.

For reasons regarding the triangulation of results and ensuring the interdisciplinary approach to the research findings, it was considered as fundamental to perform the qualitative research including academics- key informants relating to various disciplines of tourism and coming from several academic institutions of Greece (Universities and Technological institutions). These academics were specialists in the anthropology of tourism, tourism development, tourism marketing, tourism economics, new technologies, tourism geography and law.

The key informants participating in the qualitative research were individuals who had in-depth knowledge and experience in matters related to the development of special interest tourism, wellness tourism, sustainable tourism development, tourism research and education, the characteristics of tourism supply and demand and the trends at international and national level.

The key informants fully met the research process validity criteria (Schwandt, 1997: 78) as they have specific characteristics such as:

- They have a special relationship with the issues involved,
- They have specialized knowledge (at doctorate level) through their studies which they can present eloquently and clearly
- They belong to the category of "Shapers" regarding structures associated with the issues of the research, each one from their own perspective

- They have a unique perspective on social activities in tourism
- They can serve as guides in search of characteristics examined and structures / correlations developed
- They are confident and trusted advisors

Based upon the statements derived from the interviews with the key informants, diagram (1) (produced with the help of software NVIVO QSR INTERNATIONAL, v.10) presents the characteristics of the wellness tourist behaviour as perceived by the key informants.

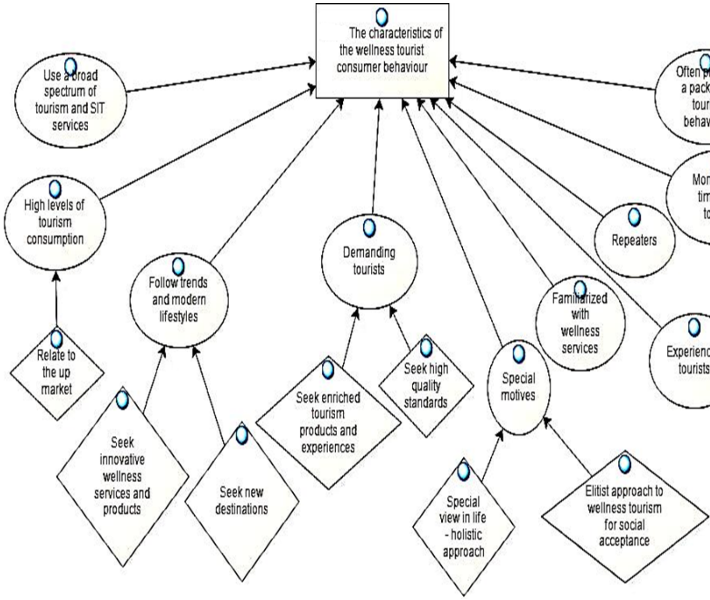
In general, according to key informants, the behaviour of wellness tourists is demanding and is characterised by the use of a wide spectrum of SIT and WT services/ products, with high levels of consumption. They are experienced tourists with special motivation, though sometimes they can present package-tourism behaviour.

Table 2. Demographic profile and consumer behaviour of wellness tourists in Greek 4*& 5* hotels

Characteristic *(sample: 369 tourists)*	**%**		**Consumer Behaviour**	
Sex Male **Female**	 32 **68**		**Duration of vacations**	45,3% stay 8-14 days 36,3% stay one week
Age 18-24 25-34 35-44 **45-54** 55-64 65-74 75 and over	 6,2 21,7 24,7 **26,6** 15,4 4,6 0,8		**Frequency of visiting wellness facilities in everyday life** **Types of facilities visited**	37% have 3-6 visits/year 24% prefer hotels and 23% specialized spa centres
Country of Origin Greek tourists **International Tourists** *Great Britain* *U.S.A.* *France* *Switzerland* *Canada* *Slovenia* *Germany* *Italy* *Russia* *Spain* *Netherlands* *Belgium* *Boulgaria* *Other*	 33 **67** *7,6* *2,7* *3,8* *1,9* *1,1* *,3* ***16,8*** *5,1* ***10,8*** *,8* ***8,9*** *1,4* *,3* *5,4*		**Services wellness tourist choose during vacations**	18% seeks ways for relaxation Aesthetic pampering appears to be among the most popular services (85%) followed by Massage (72,9%) and Hydrotherapy (68%) Alternative treatments have a dynamic (27,8%)
Highest Qualification in Education Preliminary school Junior high school High school degree **College degree** University degree Master's degree PhD	 0,5 4,6 20,1 **34,4** 23,0 12,7 4,6		**Loyalty to wellness tourism** **Reaction to market changes (price increase)** **Loyalty**	8,5% Would limit the spectrum of services to enjoy and 27,4% would try another type of SIT vacations 31% are repeaters
Occupation Higher Education Student Unemployed Full time home care **Working** Retired Other	 7,3 0,8 10,0 **68,6** 13,0 0,3		**Characteristics of a wellness trip**	Organised by a tour operator (53,5%) and through internet (27,4%) 45% Travel with their life partner 75% state WT is part of a mass tourism package
Annual Income (*in euros*) Up to 5.000 5.001 -10.000 10.001- 20.000 **20.001 – 30.000** 30.001- 40.000 40.001- 50.000 50.001- 60.000 60.001 and more	 6,8 5,7 15,2 **23,3** 19,5 10,6 9,8 9,2		**Relation to Special Interest Tourism Activities**	81,3% state their vacations combine other SIT activities Tourists state that they combine WT with cultural tourism (26%) and sea tourism (19,2%)
Source: Author's fieldwork				

Diagram 1. The characteristics of the wellness tourist consumer

behaviour



Source: Author's fieldwork

b) Motivation

Literature review (Mintel report, 2007, ISPA, 2009, Weiler and Hall, ed., 1992 etc.,), pilot survey and key informants' research lead to the development of 14 motivating items. Factor Analysis (principal component analysis) was used for grouping these items in factors according to the importance attributed by the tourists to statements relating to motivational issues. The Kaiser-Meyer-Oklin (KMO) test resulted in a value of 0,764 confirming the sampling adequacy (Mooi and Sarstedt, 2011) and the Bartlett's test of sphericity resulted in 0,000 confirming that the variables were related and the factor analysis was suitable for detection (Mooi and Sarstedt, 2011). In addition, the reliability analysis through Cronbach's Alpha (C.A.) coefficient resulted in 0,700, confirming the overall internal consistency of tested items. All factor loadings scores were higher than 0,5 indicating a good correlation between items and the factor group to which they belong (Mooi and Sarstedt, 2011). Table 3 provides a synoptic image of the major 3 Factors determining the motivation of wellness tourists in Greece, following the analysis of Maslow (1970), Crompton (1979) and Iso-Ahola (1980) on peoples' needs, and the trend that consumer visits to spas usually incorporate one of the following drivers: a)Indulgence (pleasure, fun, appealing to the senses), b) Escape (i.e. relief from the pressures of social life), c) Work (individual work related to self-improvement, i.e. physical, mental, and emotional) (Smith and Puczko, 2008). In addition the findings present one more factor relating to the need of the spa visitors to be accepted by their social peers, following the trends in order to acquire an improved social status.

Table 3. Factor analysis results with Varimax Rotation- Wellness Tourists' Motives

Factors /Components	**1**	**2**	**3**
Need to be accepted - Communitas- Following trends Following trends Improves social image and status Social peers (friends etc.) choose wellness tourism • Interesting advertising • Improving appearance	0,825 0,761 0,742 0,667 0,556		
Need to Actively Improve Quality of life Helps Improving one's health The quest for wellness services is the most important motive travelling WT Provides an optimistic aspect of life WT provides with the necessary knowledge for being most responsible and effective Wellness is a Continuous, every day effort for a better quality of life WT helps acquiring balance		0,733 0,696 0,650 0,646 0,635 0,525	
Need for Escape- Relaxation- Indulgence			0,725

(Self-reward) WT is a indulging, pleasant break from a pressuring everyday life Escape from monotonus reality WT provides calmness and depressurization			0,717 0,658
KMO= 0,764 (p=0.000) **Eigenvalues (>1)** **% of common variance** **% of cumulative variance = 51,851%** **Cronbach's Alpha (C.A.) coefficient (for all factors C.A.: 0,700)** **(***Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization***.)**	 3,058 19,759 19,759 C.A. 0,771	 2,683 19,034 38,793 C.A.0,739	 1,518 13,058 51,851 C.A.0,572
Source: Author's fieldwork			

Major Problems of the Greek Wellness Tourism Market

According to the managers' responses the major problems harrying the Greek wellness tourism market mainly relate to the insufficient promotion of the central and local authorities (72% referred to that) as a result of poor planning and developing central tourism policy. In addition half of them recognise that the infrastructure is not adequate for extended visits of wellness tourists in terms of being able to earn the title of a "wellness tourism destination" with high qualifications. Although important investments have taken place in several facilities, this cannot be said for destinations as a whole. The legal framework in terms of defining the product and bureaucratic issues is an important impediment (30%) to a smooth operation and investment attraction.

What is interesting is that managers state that wellness tourism in its modern form is difficult to relate to the traditional spa/balneary tourism (8%) even though there are plenty of spa towns and facilities longing to be renovated. This may be explained by the fact that there is an absence of wellness tourism culture in the Greek market. The image prevailing for spa tourism focuses in poor facilities with elder people- a fact that is slowly changing. In addition it may be an indication of how poorly managers deal with long term planning in sustainability terms for a more sustainable, complicated, enriched product, while surrendering in mass tourism packages. (Vasileiou and Tsartas, 2013)

CONCLUSION AND RECOMMENDATIONS

In Greece it would be inaccurate to refer to wellness tourism as an autonomous product serving a niche market or to engage in developing niche markets without reforming institutions or social and market structures that serve mass and special interest tourism structures. These structures need to be re-interpreted and re-invented in a way that would serve the special interest tourism and sustainability principles taking "full account of tourism development's current and future economic, social and environmental impacts" (UNEP/WTO, 2005), while addressing the needs of stakeholders.

Greece has a long history in therapeutic tourism (balnearies, spas etc.), with traditional spa towns offering an interesting amalgamation of wellness and healing tourism product, but it cannot be considered as a wellness tourism destination. It is safe to say that it makes its early steps in the introduction stage of the wellness tourism market.

In terms of policies to be adapted, the Greek tourism market should avoid the homogenisation of the wellness tourism product and invest in its enrichment, differentiation and upgrading in order to appeal to the demanding, modern, multi-motivated global tourist with individualised services (brand- signature treatments, revived spa-towns).

Most importantly, the related legal framework should be established and clarified in order to support new investments, secure the quality standards of the Greek wellness tourism product and allow the formation of synergies between stakeholders in a local, national, private and public level.

Wellness tourism provides an excellent excuse/ base for investing in a complex product, either complimentarily to the core mass tourism product (to upgrade and differentiate it) or as a core product depending on the destination's resources. The vast possibilities of combinations (as indicated in the surveys' findings) can ensure a new dynamic for the Greek tourism product, engaging more members of the community (either as employees or as investors), validating its comparative advantages and transforming them into competitive ones (Vasileiou and Tsartas, 2013).

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