



ECONOMIC IMPACT AND TRAVEL PATTERNS OF ACCESSIBLE TOURISM IN EUROPE – CASE-STUDIES

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Task 3 – Evaluation of the tourist experience across different tourism sectors – Task 3a – Case-studies

3a: Supply: To examine good practice/success stories in the supply of accessible offerings which act as enabling factors affecting the quality of the tourist experience of people with access needs

1 Methodology

The aim of the analysis of case-studies is to confirm or to refute the hypothesis stated in section 5.1.4. The following activities were conducted for this task:

- Hypothesis formulation
- Provisional criteria to identify case-studies were established
- List of potential cases has been analysed
- List of study cases has been discussed with the other project team in Avila during the IV. International Congress of Tourism for All.
- Submission of the provisional list to the EC
- Approval of the list with a suggestion for an amendment
- Contact with the cases
- Reception of documentation from cases
- Writing of cases
- Analysis and conclusions from the study-cases

A set of criteria have been defined to select the appropriate study cases. These criteria follow consultation with the team carrying out the other studies. The provisional criteria were as follows:

- They should be cases from all sectors of the tourism chain
- The cases should present evidence of business improvement (number of clients, employees, investment return, popularity, etc.) as the aim of this study is to provide evidence of the economic impact of Accessible Tourism and therefore we should present cases where the accessibility improvements were followed to some degree by business success
- Where measurements of client numbers are possible, figures about tourists will be presented generally, as only a small proportion of impairments is visible (i.e.: an hotel manager can recall how many wheelchair users or blind clients have been received, but may not know if a guest has an artificial limb, allergies or many other limitations – as

Scandic hotels states, 70% of disabilities are invisible).¹

- They should target the general public (as business opportunities are not only based on targeting people with access needs, and the ethical and political will is integration, not segregation).
- As much as possible the cases are selected from different countries or concern the reception of tourists from different EU countries and abroad to ensure a wide representation of the EU.
- They should be transferable to other locations or sectors
- As far as possible, the cases are drawn from both the private sector (SMEs and large companies) and the public sector.

Following definition of the criteria a provisional list of cases was defined and later amended and confirmed by the EC.

Tourism for All can be implemented in many ways. Various experiences across Europe have shown that in spite of different approaches, certain factors emerged which positively influence the development of a Tourism for All approach. These are the 7 Interdependent Success Factors (ISF), which have to be taken into account in order to ensure successful and satisfactory implementation.^[1]

Case studies from all over Europe have shown that there is a strong link between the success of projects or initiatives and the simultaneous presence of all 7 ISF. If one or more ISF is missing or disappears, there is a high risk of the project not reaching its expected goals or results.

These ISF are:

1. Decision-maker commitment: The decision to start and follow the process should be taken at the highest level.
2. Coordinating and continuity: A responsible person should be in charge of the process and guarantee the continuity if key players change.
3. Networking and participation: The internal and external stakeholders should be identified and should be involved in the process.
4. Strategic planning: Actions should be carefully planned in advance and all critical aspects should be defined.
5. Knowledge management: Considering both the internal knowledge development and transfer, and the knowledge derived from involvement in external networks.

¹ <http://www.scandichotels.com/Always-at-Scandic/Special-needs/>

^[1] Aragall/Neumann/Sagramola 2008, ECA for Administrations, European Concept for Accessibility Network, www.eca.lu . Neumann/ Pagenkopf/Schiefer/Lorenz 2008, IDZ 2009

6. Resources: Devoting the appropriate human, technical and economic resources to the actions planned.

7. Communication and marketing: Both in the sense of external communication in the usual dissemination tools but also acknowledge the contribution of all stakeholders.

In order to collect the information about the cases in a comparable way it was decided to use the Seven Interdependent Success Factors (7 ISF) to be used in the recommendations chapter.

An additional reason for using 7ISF is because our experience and experience of cases already collected from other sectors have demonstrated that to succeed in putting Design for All principles into practise none of the Interdependent Success Factors should be neglected. We also aim to validate or refute this hypothesis by finding out if there is a successful case that has disregarded any of the factors.

After this a questionnaire with open questions was designed and sent to the cases after personal, telephone or e-mail contact.

The completed questionnaires and the complementary information received have been used to write the case studies and the conclusions. For the questionnaire see Annex K.

2 Preliminary results and hypotheses

Our working hypotheses are:

H21: In mainstream tourism services investment in accessibility result in an increase in clients.

H22: Destinations that take account of accessibility are usually focused on quality of service in general.

H23: The successful accessible destinations show evidence of a degree of cooperation among service providers.

H24: At least some destinations succeed in including accessibility, comfort and services in their branding.

One of the most challenging aspects of the case-studies will be to track the investments made at a touristic destination and to obtain data about the economic outcomes of a project. This type of data is likely to be available for the suggested case-studies and will be requested from the key stakeholder, particularly if it is not otherwise available.

The case-studies have been selected to represent a range of tourism chain sectors and our suggestion is indicated on Figure 1.

The selected cases have been confirmed by the expert team and the EC.

Figure 1 – Case studies

Case-study	Type	Country
City of Erfurt	Destination	Germany
Accessible Poland Tours	Travel agency	Poland
Chateau des Ducs de Bretagne	Heritage	France
St. Martin Wine Cellar	Entertainment and shopping	Luxembourg
Berlin	Destination	Germany
Barcelona Metro	Transport	Spain
Scandic Hotels	Accommodation	Sweden
GVAM Mobile Guides for All	Assistive Technologies	Spain
Restaurant Monnalisa	Food and beverage	Italy
Restaurant Girasoli	Food and beverage	Italy

3 Case studies

3.1 Case Study: The City of Erfurt

Erfurt, the capital of the federal state of Thuringia (Germany) with 203,485 inhabitants (31 December 2012) has a medieval city centre with many points of historical interest. C. 11.2 million guests visit Erfurt every year, on average spending 45.20 € per day. The city centre and its principal places of interest are, in general, not particularly accessible. However, Erfurt is considered to be one of the most famous accessible destinations in Germany. The wide range of barrier-free offers of the Erfurt Tourism and Marketing Board includes:

- Guided tours or sightseeing tours by bus/ tram with access for disabled people
- Inclusive packages
- Accommodation
- Culinary specialities
- Events and visits to the many places of interest
- Offers in German Sign Language

Monitoring of the success factors reveals the following findings:

1. Commitment of decision-makers

- Accessible tourism is located at the top of the tourism hierarchy. The CEO of the tourist board (Erfurt Tourismus und Marketing GmbH) is responsible for the subject.
- Political supervision does exist, but politics does not control the tourism board. The decision to prioritise accessible tourism derives from marketing needs.

2. Coordination and continuity

- The tourist board has worked since 1999 on accessible tourism.

3. Networking and participation

- On a local scale, a network of service suppliers from different tourism sectors and other associated sectors like transport meets regularly with associations of disabled people.
- Since 2008 Erfurt has been a member of the association "Barrier-free destinations in Germany" (www.barrierefreie-reiseziele.de). This is an association of eight German regions particularly committed to the concept of accessible tourism for all. Its members include the Eifel region, the city of Erfurt, the Franconian Lake region, the city of Magdeburg, East

Frisia, the Ruppiner Land region, Saxon Switzerland and Lower Lusatia. The group thus works on a national and inter-regional level.¹

- On a national and international scale, the head of the Erfurt tourist board is often invited to speak at congresses and meetings. International contacts also exist.

4. Strategic planning

- The Erfurt Tourism & Marketing Board is responsible for strategic development.
- Accessible tourism is part of marketing plans and strategic planning
- Many offers for disabled guests have been developed; accessible tourism is widely understood as tourism for disabled guests.

5. Qualification and knowledge transfer

- The management and the service team are trained in accessibility in general. Some members of the staff have obtained further knowledge, e. g. in sign languages, or have attended seminars on guiding tours for blind guests. Furthermore, co-operation with local disability NGOs is strong. A constant exchange between guests and service providers is assured, and clients' suggestions are welcomed.
- City guides have been trained
- Special training for service suppliers has been offered
- Exchange of knowledge is assured within the association "Barrier-free Destinations in Germany"
- Member of the new German Project "Entwicklung und Vermarktung barrierefreier Angebote und Dienstleistungen im Sinne eines Tourismus für Alle in Deutschland". The project, commissioned by the German Ministry for Economics and conducted by the German Seminar for Tourism (DSFT) and the National Coordination Centre for Tourism for All (NatKo), aims to implement a German-wide system to validate and label accessible offers in tourism.

6. Communication and distribution

¹ The catalyst that brought six of these eight destinations together was their selection as test subjects for the ongoing study entitled "Success factors and measures to improve quality in barrier-free tourism for all in Germany", commissioned by the Federal Ministry of Economics and Technology. The qualitative data for the study was collected from these six model regions with their successful approaches and projects in barrier-free tourism. The charter of the Barrier-free Destinations in Germany Association was signed at the ITB trade fair in 2008. The association closely cooperates with the German Tourism Board (DZT) and other important players in tourism like German Railway (Deutsche Bahn).

- Website is highly accessible, including for example easy language and videos with sign language (www.erfurt-tourismus.de)
- Special-interest brochure "Erfurt erlebbar für Alle" lists accessible offers for different target groups (guests with walking difficulties, wheelchair users, sight and hearing impairments, mentally handicapped guests).
- On a national scale, accessible offers are promoted through a marketing cooperation within the association "Barrier-free Destinations in Germany".
- On an international scale, offers are promoted by the German Tourism Board (DZT).
- Offers are promoted by the German Railway

7. Improvement of resources and capabilities

- Low-floor buses and trams
- Offer:
 - City guides for disabled guests
 - Arrangements for disabled guests
 - Guidebooks for guests with sight impairments
 - Offers presented in German Sign Language

Drivers & Obstacles

Drivers

- Constant personal engagement of stakeholders was the main driver of accessible tourism in Erfurt
- Motivation of many service suppliers was often achieved by a social approach
- The number of guests taking part in guided tours increased and Erfurt has an increasing number of individual guests with disabilities. The accessible rooms in the hotels are heavily booked.
- Accessible tourism leads to positive outcomes in internal marketing

Obstacles

- The level of necessary investment is higher than expected, especially in time and human resources
- Projects for disabled guests are sometimes rather expensive and need support from public bodies, usually from the Ministry for Social affairs in Thuringia
- Constant personal engagement of stakeholders is needed

- Financial investment is currently low in this sector and it can be difficult to motivate partners to invest in common marketing projects

Further comments

- Erfurt won the award „Willkommen im Urlaub - Familienzeit ohne Barrieren“ 2003
- Erfurt has been nominated for the German Tourism award 2013 for barrier-free projects

Figure 2 – Official logo of Erfurt tourism board



3.2 Case Study: Accessible Poland Tours

The licensed tour operator “Accessible Poland Tours” has offered services since 2009, when the company was the first travel agency strongly focussed upon services for disabled people in Poland. Most clients are severely disabled people with mobility problems such as wheelchair users or slow walkers and guests with intellectual impairments such as Down syndrome. The offered services consist of:

- Incoming and outgoing tourism
- Package tours 1-6 days within Poland and abroad
- Arranging accessible hotels
- Arranging accessible transport: buses, air travel, taxis, trains
- Tailor-made tours for individuals and groups: NGO organisations
- Organising accessible routes, including accessible toilets and tourist attractions
- Booking tickets to tourist attractions, theatres
- Arranging local guides with multi-language skills
- Arranging special rehabilitation equipment.

Monitoring of the success factors reveals the following findings:

1. Commitment of decision-makers

- The founder and managing director has a disability herself and therefore is strongly committed to the ideas of accessible Tourism for All
- Where possible, the managing director conducts the tours personally guaranteeing a consistent implementation of accessibility in all its offers

2. Coordinating and continuity

- The company started in 2009 and has been managed by the same committed person since that time
- The founder and managing director usually works on her own and is always seeking constant improvements

3. Networking and participation

- “Accessible Poland Tours” is a member of the European Network for accessible Tourism (ENAT)
- Strong and enduring links with NGOs of people with disabilities would be highly desirable

4. Strategic planning

- The project has not been planned
- Methods and strategies gleaned from each tour experience, changes and improvements were introduced progressively

5. Qualification and knowledge transfer

- The managing director is herself disabled and brings an insider’s knowledge of the needs of the target groups
- The managing director also completed the required training to be a tour guide, but had no special educational background when starting the business

6. Communication and distribution

- Website (www.accessibletour.pl), which is also available in English due to the high importance of foreign markets
- Brochure is also available in English
- Congresses and meetings (often abroad)

7. Improvement of resources and capabilities

- Each tour is unique and demands an individual approach to the range of differing client needs
- The company is reactive to users' requests; for example, the need for a higher than normal bed, a special diet or piece of equipment or the assistance of volunteers, since guests frequently travel without a carer

Drivers & Obstacles

Drivers

- Personal engagement and idealism of the managing director
- Extended knowledge about guest's needs of the managing director from her own experience
- Growing interest in the company's work, mainly from abroad
- Encouragement of satisfied guests

Obstacles

- No financial or institutional support; the main problem running the business is that it is much more expensive than expected. Only between three and six groups with mostly few participants take place per year, which is not sufficient to cover costs
- Lack of accessible rooms for those on limited budgets and lack of accessible means of transport in Poland
- People with disabilities in Poland would like to travel, but often do not have the financial means
- NGOs, as potential clients, avoid using the services of the company and try to organise the trips themselves in order to save money

Further comments

- The motivation to run the business was from experienced during an organised trip to Australia
- Due to the disappointing financial situation, the business activities may be suspended or the business transformed into a Foundation

Figure 3 – Official logo of Accessible Poland Tours



Figure 4 – English version of the flyer

 **ACCESSIBLE POLAND TOURS**

THE INTERNET TRAVEL AGENCY FOR DISABLED PEOPLE

We are the first registered Polish travel agent specializing in accessible tourism services for people with special needs and we cater for:

- ✓ travelers with any disabilities (also available for visually and hearing impaired travelers)
- ✓ slow walkers and elderly people
- ✓ any tourists needing special care.

Our offer:

- ✓ transfer in an accessible van or a regular car from the airport or station to the hotel
- ✓ general or themed tours
- ✓ booking of all kinds of accommodation, ranging from budget hotels to luxury hotels
- ✓ arrangements for personal assistants & rental of rehabilitation equipment
- ✓ local attractions & special events: reservation of tickets to tourist attractions
- ✓ **Spa** resorts and rehabilitation stays
- ✓ **City Breaks**

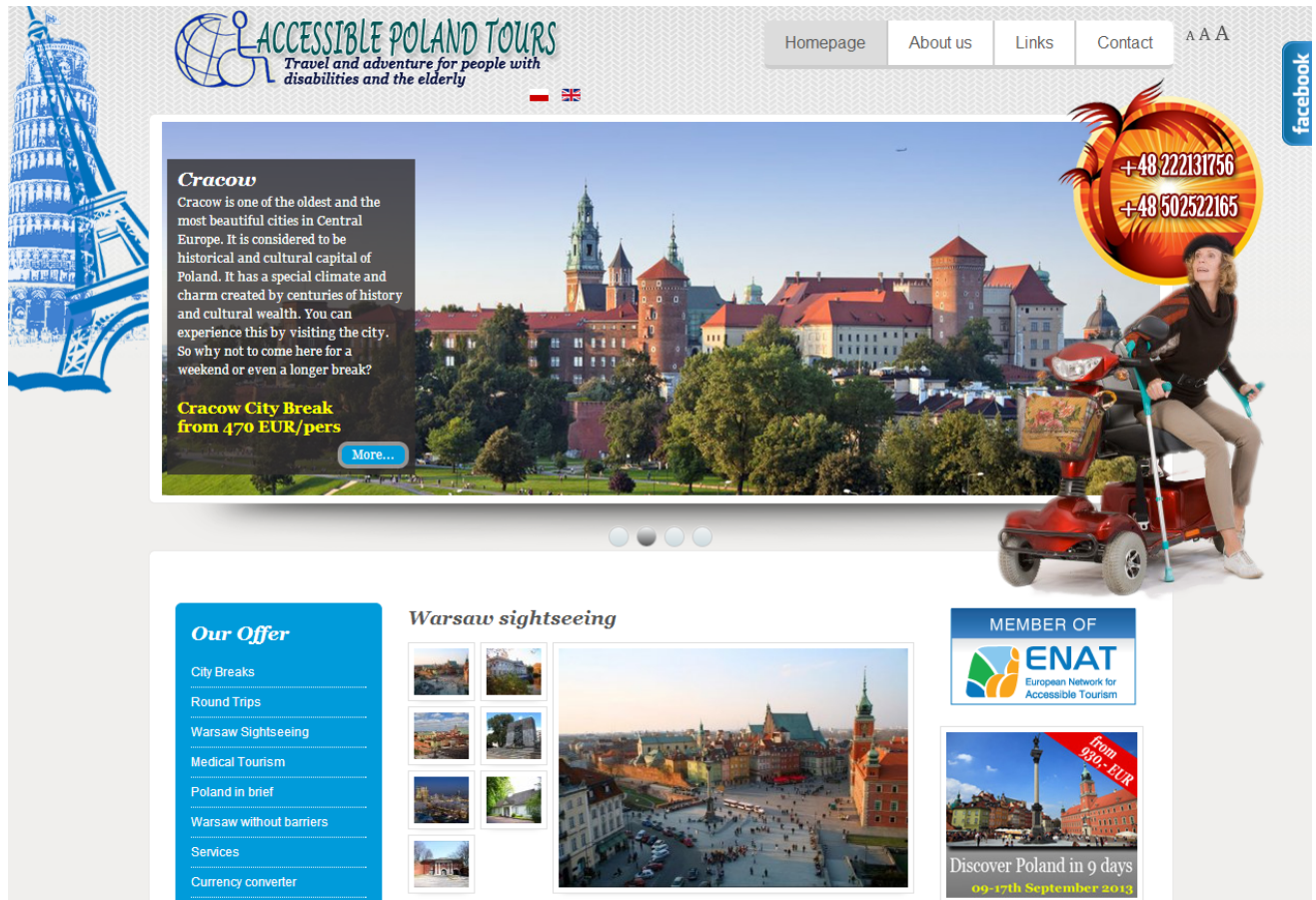
Dear Friends!
Being disabled myself I am fully aware of requirements which the disabled need. I believe that my activity enables to promote Poland throughout Europe(not only)) as a friendly and accessible country. We operate mainly from Warsaw, but our services can be extended to the rest of Poland on request. Accessible Poland Tours do their best to provide you with professional and accessible tourist services during your travels in Poland and to make your trip an enjoyable and unforgettable experience.

Margaret Tokarska



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Figure 5 – Example of the official website „http://www.accessibletour.pl”



3.3 Case Study: Château des Ducs de Bretagne

A witness to the history of Nantes and of Brittany, the Chateau of the Dukes of Brittany is a site of exceptional heritage. The mediaeval fortress encloses the 15th century ducal residence, built by Francis II and his daughter Anne of Brittany. A restoration programme, lasting a number of years, has recently been completed by the City of Nantes. It enables the creation of a modern museum, the Nantes history museum, labelled *Musée de France*.

At the forefront of contemporary museum design, with a number of multimedia features, the Nantes history museum occupies 32 rooms of the 15th century former ducal residence and displays more than 850 items from its collection. This “portrait of the city”, from its origins as the dukes’ favoured residence through to the modern city of today, covers a considerable range of European and world history, from the Edict of Nantes, the colonial period and the slave trade right through to the major upheavals of the 20th century.

Every type of disability is catered for:

- Visitors with a motor disability: 28 out of 32 rooms are accessible. The ramparts are partly accessible and reached by a lift. Free wheelchair loans.
- Sight-impaired visitors: touch and sound devices are provided around the museum, with special audio guides, visit booklets for the exhibitions...
- Visitors with learning disabilities: specific assistance at the visit, large print colour cards, fun areas in the exhibitions....

Monitoring of the success factors reveals the following findings:

1. Commitment of decision-makers

- The city of Nantes, proprietors of the Chateau of the Dukes of Brittany, re-opened the chateau for visitors in 2007 after 15 years of renovation.
- The museum advertises its commitment to inclusion for everyone.
- Nantes has a long-standing commitment, both political and practical, to improving facilities and services for disabled people across various aspects of city life. Among French accessibility professionals is, together with Grenoble, one of the more accessible cities in France.
- In 2013, Nantes obtained *the Access City Award* (European prize), just behind Berlin.
- The Chateau of the Dukes of Brittany operates a visitor policy based on four main principles: to promote the pleasure of discovery, to respect the spirit of the place, to communicate the knowledge object, and to develop subjects for further reflection. They declare that they aim to create *facilitating* environments.
- It offers a diversified range of visits, events, educational and learning initiatives, cultural programs aimed at people with little or no familiarity with the world of museums and heritage.
- The approaches offered are both interactive and multidisciplinary, making the Castle a place of exchange and encounter, inviting its visitors to build a long-term relationship with it.
- The low-floor tram system provides a good connexion with the city centre.

2. Coordinating and continuity

- There is a manager responsible for development and visitor policy who coordinates staff activities under the municipal structure.

3. Networking and participation

- The City has adopted a Disability Action Plan. Therefore, the manager worked with technical staff from the municipality and with the Nantes Council of Disabled People. Associations of disabled people also participated in the project.

4. Strategic planning

- It was been a planned project since the beginning aiming to devise innovative approaches for all visitors.
- Finance, time and human resources planned from the beginning.
- The restoration program cost 51,530,000 €. The finance for the restoration programme comes from : 58% the municipality ,2% the metropolitan area,7% the department of Loire-Atlantique,10% the Pays de la Loire region and 10% European Regional Development Fund.
- The chateau does not have specific budget allocated for improvements to meet the needs disabled people. Each project integrates financially the needs of disabled people.

5. Qualification and knowledge transfer

- The process was based on trial and error through the engagement of users. Disabled people tested the infrastructures until a suitable solution was found.
- An important network including among others museums, associations and design schools also contributed to improvements
- Vocational training has been provided to the staff.

6. Communication and distribution

- The chateau website.
- Brochures.
- Information directly shared with a network of associations

7. Improvement of resources and capabilities

- Visitors with a disability are welcome at the Chateau of the Dukes of Brittany. Tours and features adapted to specific disabilities as the following offer summarises:
 - Sensory tours open to everyone: these visits allow visitors to discover some of the

topics covered by the museum and its exhibitions through the use of objects, as well as sound, visual, olfactory and tactile experiences.

- Accessible exhibition spaces: visitors can use rest areas and borrow wheelchairs or folding stools.
- Guided tours: Visitors with physical disabilities can follow general or themed guided tours, family tours (museum and exhibitions) or the museum's short tours series
- Audio guide tactile tour of the museum: using both a special audio guide (only available in French) and different tactile and sound features available throughout the museum, the visit is made accessible to visitors with visual disabilities
- Exhibition booklets and guides: in Braille, embossed or in large print
- Guide dogs are welcome
- The ticket-front desk has induction loops available
- The multimedia terminals are subtitled and interactive.
- Leaflets summarizing the content of certain films are also available.
- Visual descriptions in French Sign Language (FSL) are available all year round in order to allow visitors with hearing disabilities to discover the museum and the chateau, whether on their own or accompanied. Tours in FSL linked to exhibitions are also on offer.
- The Internet site offers practical information and a presentation of the site in FSL.
- A booklet and educational materials designed for visitors with developmental or learning disabilities: a selection of objects in a dozen or so rooms is highlighted in a booklet and educational materials, for example commentaries, treasure trails, the use of magnets and associations of ideas.
- Different materials allow visitors to discover the museum at their own pace:
 - Colour maps depicting Nantes in a simplified fashion down through the ages.
 - Multimedia features (films, terminals, interactive maps) provide information on a variety of subjects.
 - The exhibitions include interactive spaces.
- Group tours:
 - With a guide, by reservation only: a variety of bespoke visits have been designed based on a sensory approach, observation, the handling/touching of objects and participation, such as: the castle down through the ages: architectural tour that includes the handling of materials and models; monsters and stone animals: tour of the castle followed by a modelling workshop inspired by the castle's decorative, sculpted features; sailors and sea monsters: tour of the museum followed by a modelling workshop; and the contours of the city: an interactive tour to enable visitors to better understand the city's development and transformation down

through the ages.

- Without a guide: the group leader may make use of the booklet and educational materials, available free of charge, at the front desk.

Drivers & Obstacles

Drivers

The most important factors are commitment at the highest level within the City to improved accessibility and a clear and continuing link between the City at political and operational levels and citizens with a disability and older citizens.

The Chateau of the Dukes of Brittany is a core feature of the cultural, economic and tourist development of Nantes and its estuary. Their refurbishments, with the creation of the history museum, and its artistic events program running throughout the year, have enhanced the site's interest and appeal.

As of early 2013, six years after the museum reopened to the public, more than 7,500,000 people have visited the castle. The museum and the exhibits have received more than 1,100,000 visitors.

In the museum, people with a disability represent 1.7% of the visitors (those who identify themselves as such when obtaining free entrance) - 68% of them are individual visitors and 32% in a group.

The geographical distribution of the national disabled visitors is as follows:

67% come from the surrounding department of Loire-Atlantique

7% come from the Brittany region

6% come from the Paris region

4% come from Pays de la Loire region

10.5% come from other regions of France

5.5% disabled visitors are foreign visitors. They are mainly European.

The museum team estimates that 6% of those visiting the Castle have some kind of disability that impacts their daily lives.

In 2008, the Castle received the "Museums for everyone" award from the Ministry of Culture, in recognition of its accessibility policy.

In 2011, the castle obtained the label «tourism and disability» for the 4 impairments, mobility, visual, audio, and mental.

The Castle has made accessibility and Design for All a core priority.

Figure 6 – Château des Ducs de Bretagne

Le château des ducs de Bretagne



3.4 Case Study: Cave St Martin Winery – Remich, Luxemburg

<http://www.cavesstmartin.lu>

The Caves St Martin winery is based in the municipality of Remich, one of the most picturesque and frequented by tourists village on the left bank of the Moselle river, a few kilometres from the border triangle between Luxembourg, Germany and France.

Monitoring of the success factors reveals the following findings:

1. Commitment of decision-makers

- From the Beginning of the family business on, attention was paid to the clients' needs. So that the decision to care for accessibility has been for the family a matter of fact pertaining to the internal policy and way of doing business.

2. Coordinating and continuity

- The goal of the Caves St Martin has been to be accessible for everyone, so every generation of the family made improvements, according to the technical state of the art. Improvements take place with the help of new equipment, especially in the area of sanitation.

3. Networking and participation

- Since 2009 the Cave St Martin Winery has held the EureWelcomeLabel. The EureWelcome label is recognized in the Grand Duchy of Luxembourg as well as in six neighbouring regions of Belgium, the Netherlands and Germany. In Luxembourg the Ministry of the Middle Classes and Tourism is responsible for the delivery of the EureWelcome, showing a strong will from the government to include accessible tourism in the mainstream of touristic offers. The label is awarded to service providers in the fields of tourism and recreation for their special efforts in terms of accessibility and welcoming everyone including people with disabilities. The philosophy of EureWelcome label is increasingly orientated to the concept of "Design for All". This means that the quality of accessibility is not only the convenience for disabled people, but also for society in general.

The accessible premises are brought to the attention of potential customers and visitors via

the website www.welcome.lu as well as via brochures and links to nationally and internationally reputed as cultural and tourist sites.

4. Strategic planning

- Different offers for guests have been developed, such as guided tours through the cellars accessible for wheelchair users, with the possibility of having explanations in simplified language. The guided tour lasts about 45 minutes. On demand, it is also possible to have a guided tour in German sign language through the integration service from the city of Luxembourg.

Tasting experiences are offered for different target groups: wine for adults and grape juice for children.

- Accessible tourism is mainly understood as tourism for disabled guests.

5. Qualification and knowledge transfer

- Management and staff are trained in accessible tourism and have personal experiences with guests with special needs. Communication with guests is ensured, management and staff are ready to learn from the suggestions of their guests.

6. Communication and distribution

- Info about the accessibility condition of the winery is available in the EureWelcome Label website (www.welcome.lu), but only in French. Other languages are likely to follow soon.
- Communication about accessibility is mainly due to the word-to-mouth way among visitors.

7. Improvement of resources and capabilities

- Designated parking place for people with disabilities.
- Entrance door and internal route without threshold, steps and obstacles.
- An adapted toilet is available next to the visitor reception.
- Guided tour in simplified language and with the help of gesture.

Drivers & Obstacles

Drivers

- Constant personal engagement was the main driver of being accessible for the winery owners.
- The winery owners feel that the loyalty of their clients, disabled or not, is proving that they are working in the right way and that they are providing the visitors what they need and look for.
- According to <http://www.wine-pages.com/features/luxembourg-wine.htm> they receive 30,000 visitors per year.

Obstacles

- Constant engagement is needed.

Figure 7 – Parking place and entrance to the Winery (Photo: www.welcome.lu)



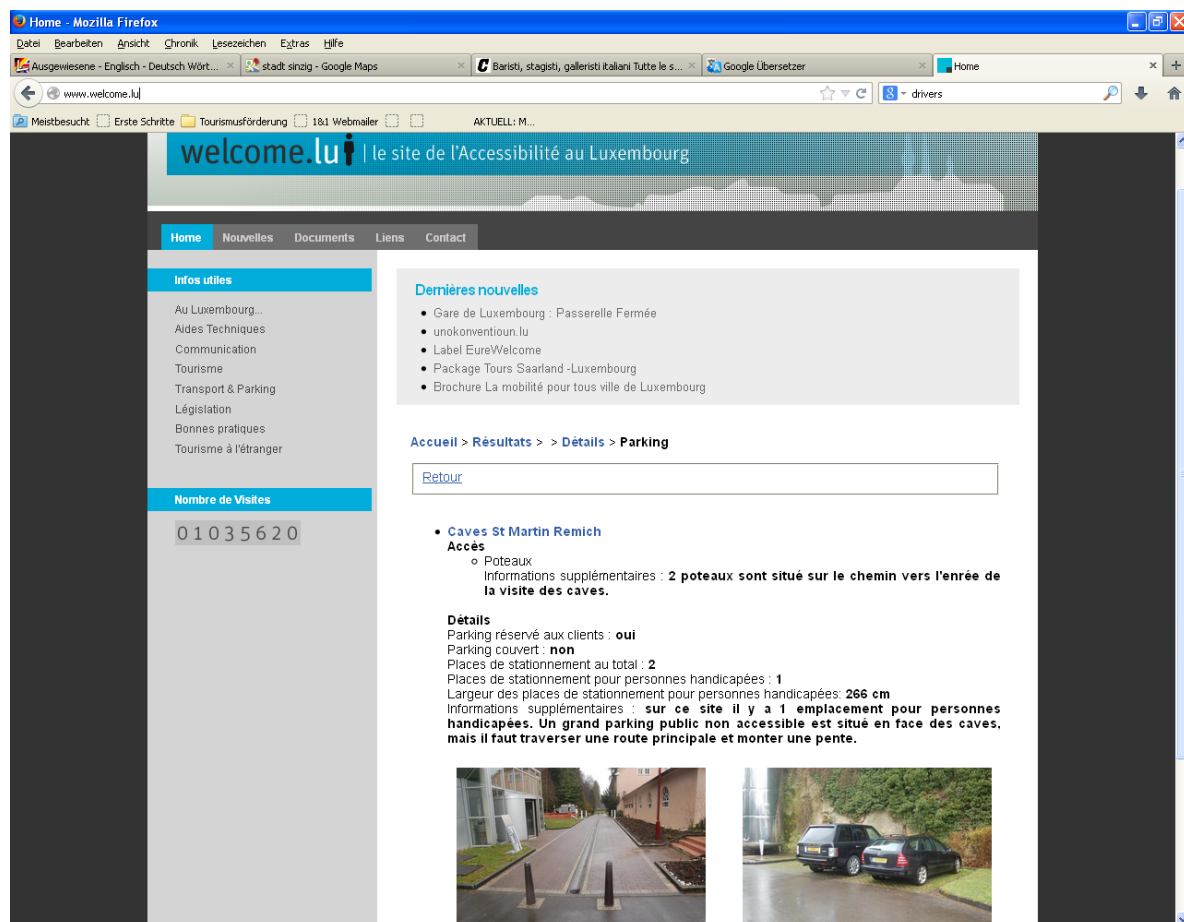
Figure 8 – The Eurewelcome label at the Winery entrance door (Photo: NeumannConsult 2013)



Figure 9 – The wine cellar (Photo: NeumannConsult 2013)



Figure 10 – Webpage www.welcome.lu



3.5 Case Study: Berlin City, Germany

Berlin, the capital of Germany, covers an area of about 890 square kilometres (nine times bigger than Paris), with 3.5million inhabitants, including over 494,400 residents with foreign passports. People from more than 185 nations are long-term residents in the city making Berlin the most multicultural city in Germany.

Berlin has 175 museums, 3 UNESCO World Heritage Sites (Museum Island, the Prussian castles and gardens, Berlin modernist housing estates). About 44 per cent of its area consists of parks and woods, or rivers, lakes and waterways (over 180 kilometres of these are navigable).

The city's public road network is about 5,400 kilometres long, lined with more than 400,000 trees. The metro, tram, S-Bahn and bus lines already cover about 2,300 kilometres.

Tourism in Berlin is booming. In 2012, almost 11million people visited Berlin, with a growth in arrivals and overnight stays of about 12% (Source: <http://www.visitberlin.de/en/plan/city-info/numbers-facts>).

Since 1992, the City of Berlin is developing accessibility offers through the entire service chain, with the Motto: 'Berlin for disabled people: the city is prepared.' To honour the efforts of Berlin, the city has been rewarded with the Access City Award in 201. Monitoring the success factors reveals the following findings:

1. Commitment of decision-makers

- The tourism board is committed to Accessible tourism
- The Accessible Tourism strategy is supported by political authorities
- All catering establishments opened since 2006 have been required to be accessible following a City legal disposition
- Within the round table Berlin "barrier-free city", under the leadership of the Senate Department for Urban Development and Environment, stakeholders from government, companies and associations merged. The aim of the cooperation is the pooling of initiatives and the expansion of Berlin as a barrier-free city

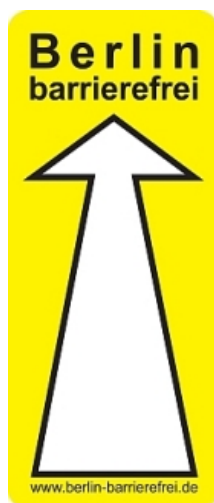
2. Coordinating and continuity

- Since 1992 the city of Berlin has followed a policy of accessible organisation and design of the city itself, from pedestrian crossings, public infrastructures and means of transport, buildings and open spaces. The goal is to allow the citizens and tourists equal participation in all aspects of life in Berlin, social, economic and cultural.
- Round table as a guarantee for continuity (see below)

3. Networking and participation

- The responsible staff member of the Berlin City Senate is a contributing member of the federal state's tourism boards working group on accessible tourism
- Berlin is a member of the Eurocities Working group on accessibility
- Berlin has established links and ongoing co-operation with its twin city Moscow on accessibility
- The label "Berlin barrierefrei" has been developed through collaboration between representatives from industry, trade, tourism, culture and science, people with disabilities and their organisations, advisory boards, administrations and other institutions. This label displayed on a door or shop window, on a metro lift or a public toilet says that all people, including those with disabilities, can clearly get in and have support, where needed. Moreover, the label offers business people the opportunity to advertise themselves as barrier-free premises and thus to attract new customers.

Figure 11 – Label "Berlin barrierefrei" (Source: www.berlin.de/lb/behi/barrierefrei/signets/index.html)



4. Strategic planning

- According to the city Senate Resolution of 7 June 2011, the guidelines for the development of Berlin as an accessible city should be transposed and implemented in terms of Design for All
- The Senate Department for Urban Development and Environment of the city of Berlin has developed a draft for the concept of a Round Table "City without barriers/accessible city". Within the Round Table, Accessible/Tourism for all represents a development task, in connection with the accessibility of infrastructures of the city itself. This should require a

coordinated effort on team working between the Senate and public administrations with organisations and initiatives from civil society

- "Accessibility of Destination Berlin" - is a basic empirical investigation of the EBC Hochschule Berlin which was initiated by Visitberlin. This study is a comprehensive analysis of the situation and represents the status quo in Berlin, making also a comparison with Brandenburg
- Berlin's further steps towards a more accessible city and tourist offers will be:
 - Creating more accessible packages,
 - Strengthening co-operations and communication
 - Web marketing, fairs participation, Advertisement und Media campaign,
 - Standardising labelling of barrier free offers for all Germany
 - Developing of quality standards
 - Training of staff within the tourism service chain
 - Working closely with political decision makers

5. Qualification and knowledge transfer

- Knowledge stems from internal capacities, engagement and qualification
- Staff of Berlin's transport system gets regular training in services for disabled guests
- Berlin takes part in many working groups like the federal state's working group on accessible tourism, the Eurocities Network and twin cities partner programmes, all meant to transfer know-how and knowledge

6. Communication and distribution

- On the website www.visitBerlin.de there is a great deal of information about offers of accessible tourism. The site works closely in joint working groups with different partners in order to formulate offers responding to the requirements of the different target groups. The offers cover the entire service chain: arrival, mobility on site, accommodation, food and drink, entertainment and departure.
- Information about accessibility issues: <http://www.berlin.de/tourismus/infos/1730823-721039-barrierefreies-berlin.html> <http://www.visitberlin.de/en/plan/city-info/accessible-berlin> <http://www.berlin.de/lb/behi/barrierefrei/>
- Mobidat provides an important database on tourism and accessibility in Berlin
- <http://www.mobidat.net/links/tourismus/>

- The "Berlin Special Guides" guide people with and without disabilities in the Reichstag, through the "Mitte" city quarter, or to Potsdam. In special tours of Berlin's past historical episodes are described, as well as providing a wealth of information and background on the topic "barriers and disabilities"
- Cross-border cooperation with Potsdam / Brandenburg is continually being expanded and deepened in joint projects
- The issue of "accessibility" is also integrated in the work program of "service in the City".

7. Improvement of resources and capabilities

- Qualification of individuals (e.g. continuing training programme of staff of Berlin's public transport system)
- Networking and collaboration with the main service providers of the city
- The wide range of barrier-free offers in Berlin includes:
 - Guided tours or sightseeing tours by bus with access for disabled people
 - Accessible accommodation, restaurants and shops
 - Inclusive packages
 - Events & visits to the many places of interest
 - Offers in German Sign Language and in Braille, audio-guides, experiences for the senses of smell and touch

Drivers & Obstacles

Drivers

- Constant engagement
- Accessible tourism leads to positive results in marketing
- Access City Award 2013 as an additional motivation for stakeholders and politicians

Obstacles

- Large investments needed
- Constant engagement of stakeholder is needed.

Further comments

- In the third edition of the European Commission Access City Award 2013, the Award was given to Berlin. The Access City Award recognises and celebrates cities of over 50,000 inhabitants in EU which have put into action exemplary initiatives to improve accessibility in

the urban environment, allowing people with disabilities to participate fully in society and to enjoy their fundamental rights on an equal footing with others.

The award covers four key areas of accessibility:

- built environment and public spaces
- transport and related infrastructure
- information and communication, including new technologies
- public facilities and services, and the city must also demonstrate that it is committed to continued improvements in accessibility in a sustainable way, so that it can act as a role model and encourage the adoption of best practices in all other European cities.
- Berlin was selected on the basis of its strategic policy and inclusive approach to disability. In fact, massive investments have been made to transform the city into an accessible and barrier-free environment (for instance transport system and reconstruction projects to facilitate the access of people with disabilities).

Figure 12 – Website www.visitberlin.de



3.6 Case Study: Barcelona metro

The Catalan railways (FGC) transport more than 80 million passengers every year. FGC operates some of the Barcelona commuter rail network. There are two distinct (and separate) systems: the Metro del Vallès and Línia de Balmes are standard-gauge lines, while the Metro del Baix Llobregat and Línia Llobregat-Anoia are metre-gauge lines.

The check of the success factors reveals the following findings:

1. Commitment of decision-makers

- Since late eighties when Catalan society become aware of the need to improve the city for the organisation of the 1992 Olympics and Paralympics Games the top management of the company has supported the constant accessibility improvements.

2. Coordinating and continuity

- The company's management staffs have been always aware that accessibility and Design for All are key elements of the service quality.
- Design for All principles have been transmitted in a "viral" way among all company department, from planning and design to service provision, information, public relations, ticketing, etc.

3. Networking and participation

- Since FGC was aware of the need for improving accessibility has been in close contact and consultation with administrations and NGOs dealing with the People with Reduced Mobility but also with experts.
- They have a close collaboration with the other metro company and transport authorities to guarantee the easy navigation of passengers along the different transport networks.
- They have actively participated in public transport international organisations and have also been invited to lecture at international events dealing with Design for All.

4. Strategic planning

- All the improvements made have been accurately planned and budgeted over the years.
- Assessment of accessibility conditions considering the typical accessibility aspects but also lighting, loudspeakers, etc.
- Satisfaction survey and constant contact with customers' representatives (disabled or not disabled) bring new improvement opportunities.

5. Qualification and knowledge transfer

- Personnel training is also included in the planned activities (for example a course on how to communicate with deaf customers)
- Staff aware of Design for All and provided with appropriate training

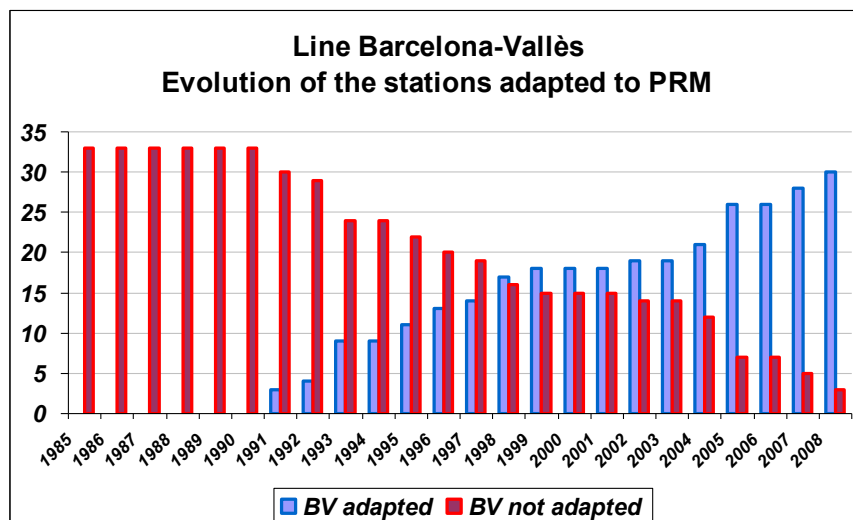
6. Communication and distribution

- Website www.fgc.cat , which is also available in English.
- Brochure and maps also available in English
- Website indicates which client offices can deal with deaf clients and the accessibility facilities for each station.

7. Improvement of resources and capabilities

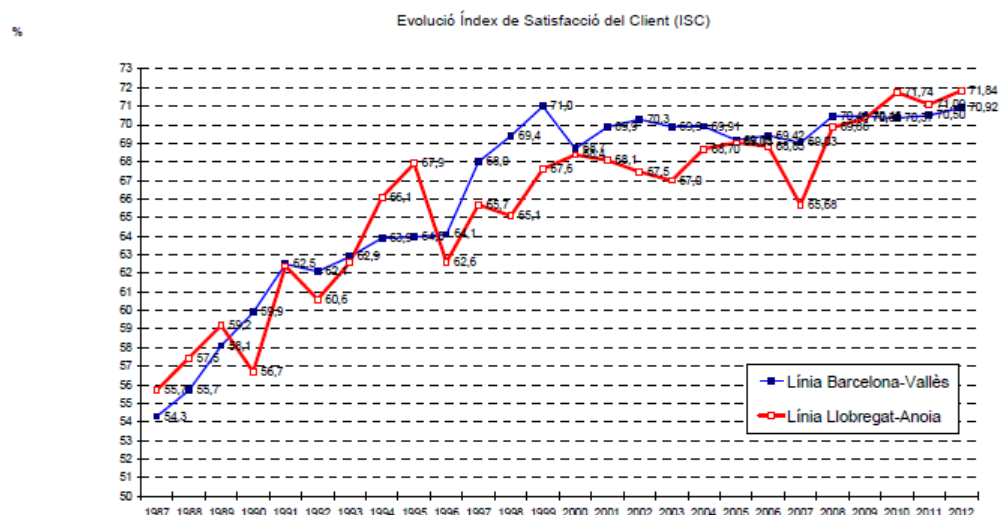
- 95% of their stations are accessible. The cumulative investments in these stations were 17.1 M€.

Figure 13 – Evolution of the adapted stations



- Accessibility is one of the aspects evaluated in the Clients' Satisfaction Index that is constantly improving

Figure 14 – Evolution of the client satisfaction index



It should be underline that, although other factors (like mobility trends, tourism and immigration, etc.) have intervened in the overall mobility data, while population have increased 5.3% in the period 1997-2006, the number of journeys have increased by 69%. Comparing it with the other metro company who started the accessibility improvement later, in the period 2001-2006 TMB increased the number of passengers by 16% while FGC increased its number of customers by 23%.

Although FGC attributes this increase to quality improvements in general (including accessibility) their own analysis concludes that renovation to make a station accessible increases the number of passengers at a station by 16%.

Accessibility is not an isolated issue but a component of the overall quality of the service provided.

No evidence exists for a direct relationship between the level of investment and the number of customer journeys, but we can observe a continuous increase in the number of passengers in the period 1997-2006 where the improvement in accessibility was constant (important changes like the integration of tariffs in the Metropolitan Area did not dramatically affect the rate of progress).

Obstacles

- The main obstacle at present is the dramatic economic restrictions in the public sector that delay further improvements and involvement in international networks.

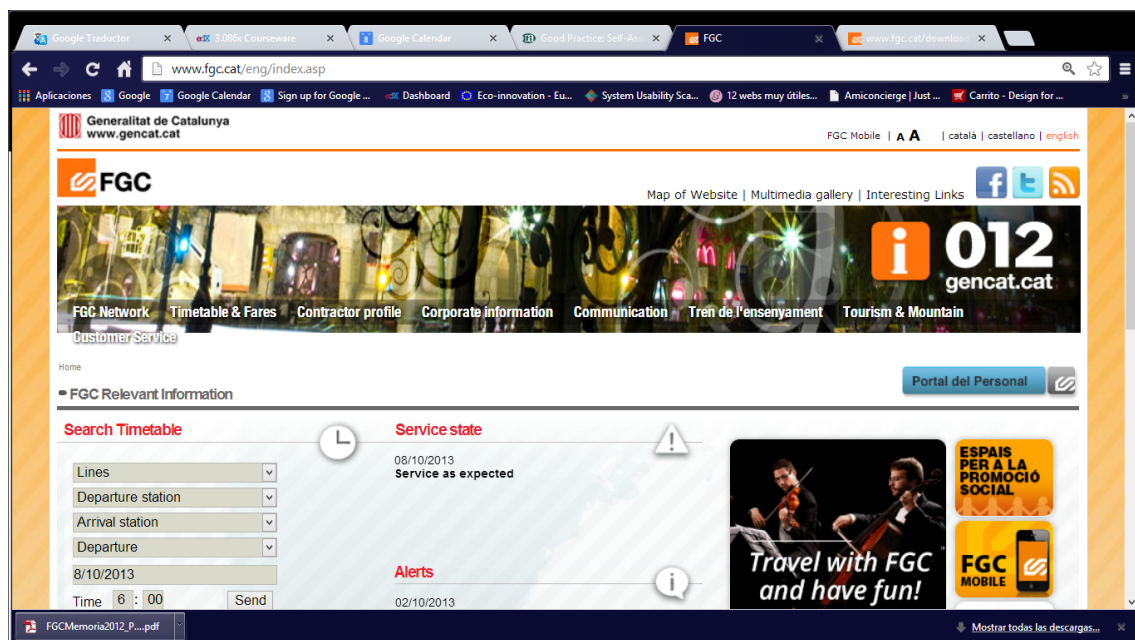
Further comments

- Although it is not the object of this case study FGC manages five ski stations and their premises (ski facilities, hotels, restaurants, etc.) and also manages the transport systems (cable car, funicular, mountain train) in Montserrat, one of the most outstanding religious tourism destinations with more than 2m visitors/year. The same Design for All criteria are also applied to these other services.

Figure 15 – Official logo of the FGC



Figure 16 – Website of the FGC



3.7 Case Study: Scandic Hotels

Scandic Hotels is a hotel chain operating in Sweden, Denmark, Finland, Norway, Germany, the Netherlands, Belgium and Poland.

The first hotel was established in 1963 and now they have 155 hotels in operation with 29,696 rooms and they plan to open three new hotels soon. They have 7,500 employees.

Their offer is aimed at companies, families, couples and events.

Around 500 hotel rooms have been adapted to meet the requirements of people with some kind of disability.

All the 155 hotels are working with Scandic's own accessibility concept which is their Accessibility Standard. The standard has grown over the years and today it contains 110 check points to follow. 81 of these points are mandatory for all hotels and for new hotels all points must be considered. This standard works as a checklist and template for the hotels.

Scandic offers:

- Rooms for disabled people (equally well-designed as any other room)
- Full accessibility information online – every Scandic Hotel has its own page with unique information about the hotel and its facilities. They also provide a general information page about accessibility such as recommended hotels in different cities, tips and advice, useful links and more
- Public areas at the hotel that are adapted for people with special needs, such as a lowered reception desk for wheelchair users, a hearing loop in conference facilities, vibrating alarm clock and more.
- Food & Beverage - No allergenic garnish on the buffet breakfast, Gluten- and lactose-free bread at breakfast
- Guide dogs are always welcome at the hotels

Monitoring the success factors reveals the following findings:

1. Commitment of decision-makers

- The Scandic Group Executive Committee is responsible for any action carried out about accessibility, the Disability Ambassador report directly to them.

2. Coordinating and continuity

- The accessibility commitment started in 2003. Since then Magnus Berglund, now appointed as Accessibility Director at Scandic is responsible for this activity.

3. Networking and participation

- Magnus Berglund is member of ENAT
- They work continuously with disability organizations, hotel guests and team members

4. Strategic planning

- Its strategy is to include accessibility and Design for All in all operations of the company.
- A check list is applied to any new hotel and renovation.
- Staff education has been included as a planned strategy.

5. Qualification and knowledge transfer

- To increase constantly their own knowledge and listen to the clients is the key factor for qualification.

6. Communication and distribution

- The Scandic group use their website, marketing material, PR, internal communications and lectures, for instance at accessibility conferences to advertise their business.

7. Improvement of resources and capabilities

- As the accessibility improvements are included in the general budget there is no need for any special resource.

Drivers & Obstacles

Drivers

- A former employee of Scandic suggested using accessibility to gain a competitive advantage after being affected by a long term illness.
- Their goal is that everyone should be welcome at Scandic regardless of whether they have a disability or not.
- A high level of satisfaction feedback. Some of their guests said they weren't able to stay at a hotel until they started to work with disability.
- Already 2005 they could see that they sold 15,000 more room nights in Sweden due to that they can offer rooms for disabled.
- They can see increased business every year in all countries.
- Many of their investments have been repaid in less than one year.

Obstacles

- No specific obstacles were mentioned by the stakeholder

Further comments

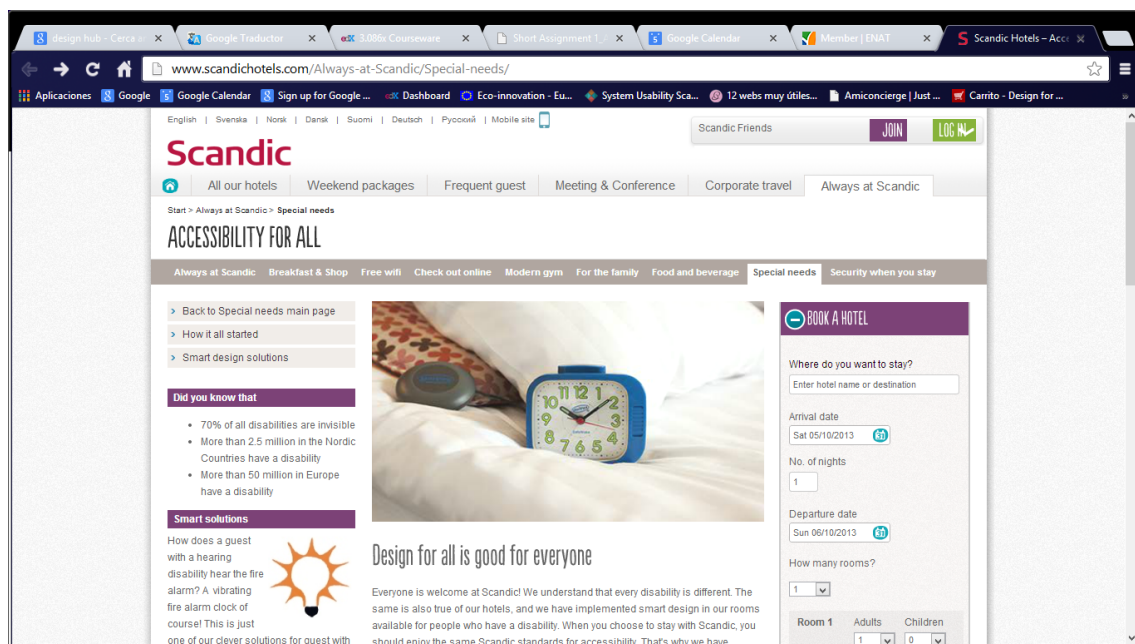
There is a critical issue in order to succeed: Service providers need to combine business knowledge with knowledge of special needs.

www.scandichotels.com/specialneeds presents their approach to Tourism for All.

Figure 17 – Official logo of Scandic

The Scandic logo consists of the word "Scandic" in a bold, sans-serif font. The "S" is a dark red color, while the remaining letters "candic" are in a dark blue color.

Figure 18 – Scandic webpage



3.8 Case Study: GVAM

GVAM was created in 2007 with the aim of reinventing the concept of a guided tour. Their aim was to provide the best educational and emotional experience when exploring cultural and tourist areas. Their business model is based on focussing on people. They consider accessibility as synonymous of good design and good performance. Their aim is that their technologies are and will always be easy to understand, simple and cost-effective implemented.

The team consists of professionals from the world of graphic, industrial and interactive design, computer engineering, social communication, international marketing and research.

They offer accessible mobile apps made with GVAM, an online system for creating and publishing audio tours and multimedia guides on major mobile platforms

GVAM was conceived as a universal guidance system including people with disabilities.

The check of the success factors reveals the following findings:

1. Commitment of decision-makers

- Culture must be accessible for all. That was the main idea of founder partners since beginning.
- It is not only a rewarding point but a responsible attitude before society.

2. Coordinating and continuity

- The company started as a partnership between Dos de Mayo SL (multimedia and web production), Universidad Carlos III de Madrid (R&D&i), ONCE (Spanish blind people main NGO) and CESyA (Spanish Centre for Audio description and subtitling), CNSE and FIAPAS (both federations of associations of deaf people, one with a more sign language approach and the other with a more oral one)) and with the support of the Real Patronato sobre Discapacidad (Official Spanish organisation dealing with disability). Although they maintain excellent relations the company is run by their staff independently.

3. Networking and participation

- The service was launched with the advice of national associations of people with disabilities and the National Administration and they still keep strong links.

4. Strategic planning

- The process was planned since the beginning but improvements have been made in order to benefit customers from the latest technology and user's requests.

5. Qualification and knowledge transfer

- GVAM have in its team external advisers about special access needs although internal knowledge grows day by day.

6. Communication and distribution

- Their own web site, Apps (can be downloaded in Apple Store the ones for Museo Lázaro Galdiano, Alcázar, Museo Sorolla) and brochures.
- Speeches in professional museum and accessibility events.

7. Improvement of resources and capabilities

- The requested investments for initial R&D&i were planned from the beginning but not the ones related to technical evolution. The investment pay back for the start-up was 3 years.
- They are really proud of GVAM as the only accessible guiding system in the market, as they claim. It was a good investment for society because they consider that we all have special accessibility needs. Although their clients are increasing they don't know if the number of museums' visitors increased but they perceive that all enjoy richer experiences with no extra costs.
- The published Apps are compatible with the native accessibility features in iOS and Android, such as VoiceOver and TalkBalk.
- They claim that visitors of all ages, abilities and languages may use the guides thanks to the advanced editing tools that incorporate:
 - Automatic audio-navigation for the visually impaired.
 - Subtitled voiceover speeches and automatic full review online editor.
 - Sign language videos.
 - Easy reading texts and pictograms.

Drivers & Obstacles

Drivers

- Social Responsibility and detection of a lack of communication about accessibility in cultural premises.

Obstacles

- The critical issues are institutions in charge of incorporating accessible products or services. They have no knowledge about what to do and they are afraid of costs and technologies.

Figure 19 – GVAM webpage

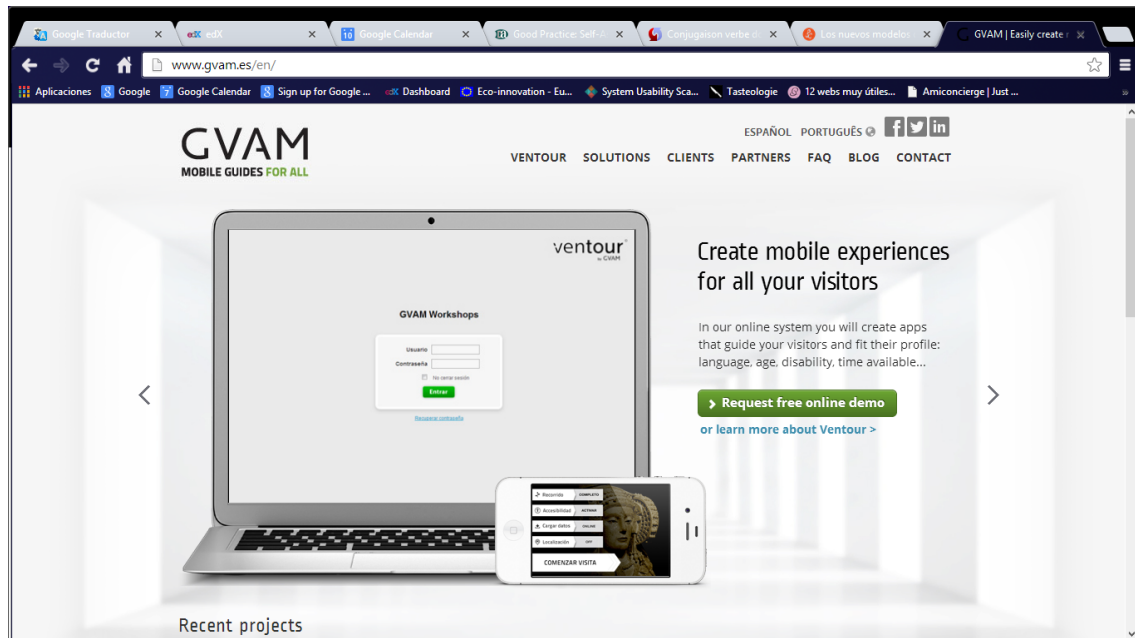


Figure 20 – Official logo of SGVAM



3.9 Case study: Restaurant Monnalisa Beach Restaurant

The Monnalisa Beach Restaurant is situated inside the Holiday Village Florenz in Lido degli Scacchi, Comacchio (Ferrara), built in 2008 according to the Italian accessibility laws.

The menu is normally based on seafood and fish. On demand it is also possible to have meals for people with food allergies and intolerances.

The restaurant is open also to external guests and is available for special events, celebrations and parties.

Monitoring the success factors reveals the following findings:

1. Commitment of decision-makers

- The property owner are aware of Accessible tourism and committed to it

- The propriety decided in 2006 to arrange in an accessible way the facilities within the Holiday Village. In this perspective, some bungalows and holiday flats had been built and furnished in a way that could fit the needs of as many guests as possible; moreover the restaurant Monnalisa was built barrier-free to allow every guest (internal and external) to fully enjoy the time within the Holiday Village.

2. Coordinating and continuity

- Since 2006 the internal policy of the propriety has started to develop the accessibility organization and design of the Holiday Village, from car parks, to paths leading to the facilities, to the restaurant and to the beach, toilets and to the restaurant itself. Moreover, the staff is also specifically trained to meet the needs of guests with disabilities. They have the idea to developing it always consistently further, for example, for the next season it is foreseen to install some fittings for people with visual impairments and also to have menus in Braille.

3. Networking and participation

- The Restaurant Monnalisa, being in the Holiday Village Florenz, belong also to the Network Village4All, a Quality Brand Hospitality for All, that provides accessibility survey and makes the info freely available in the own website.
- The property has regular exhibits at the tourism Fair “Gitando”, since its inception.

4. Strategic planning

- The property’s commitment to accessibility is based on both social and business reasons.
- It carries out careful and constant promotion activities on its website and through specific sporting events and tourist promotions.
- The further steps towards more accessible offers will be:
 - Creating more accessible packages and providing more fittings and facilities for guest with different disabilities
 - Increase Web marketing, fairs participation, Advertisement and Media campaigns

5. Qualification and knowledge transfer

- Staff have been trained in services to fulfil the needs of guests with disabilities

6. Communication and distribution

- Through the link www.campingflorenz.it/eng/village/camping-for-disabled.php it is possible to find out much information about the accessibility of the Holiday Village.
- Info about the accessibility condition are also available here: www.villageforall.net/en/italia-emilia_romagna-lido_degli_scacchi_comacchio_ferrara-campeggio_villaggio_accessibile-holiday_village_florenz/

7. Improvement of resources and capabilities

- Website improvement
- Networking and collaboration
- It is possible to rent a wheelchair to move within the Holiday Village and also to reach the Restaurant. It is possible to have the meals delivered from the restaurant to the holiday houses within the village.

Drivers & Obstacles

Drivers

- Constant engagement
- Accessible tourism leads to positive results in marketing and business

Obstacles

- Investment is needed

Further comments

- The accessibility improvements have given to the restaurant and Village the possibility of hosting groups of people with disabilities and also to host accessible sporting events.

Moreover, the accessibility of the facilities guarantees more comfortable experiences for all the guests, who are mainly families.

Figure 21 – Monnalisa restaurant (Photo: <http://www.campingflorenz.it/ita/servizi/monnalisa.php>)



3.10 Case study: Restaurant I Girasoli

I Girasoli Restaurant is situated within the Casa Vacanze I Girasoli in the southern part of Tuscany.

The all facilities have been built in 2000 according to the Italian accessibility laws. Everything was designed and built with a special focus to the needs of guests with mobility impairment. The Casa Vacanze belongs to AISM, (Italian Multiple Sclerosis Society), an Italian national charity on Multiple Sclerosis and it was foreseen to host the own members and families.

On demand it is possible to have meals for people with food allergies and intolerances.

The restaurant is open to external guests and is available for meetings and special events.

Casa Vacanze is fully accessible to people with mobility impairment. In this perspective, the 51 rooms and 9 bungalows, the restaurant, the paths in the surrounding park and the external areas can be fully enjoyed by all the guests (there are also 2 swimming pools with lifting equipment to access to water and a gym).

Not only the buildings, connection paths and open spaces are accessible, but the staff can propose a series of accessible service to the guests, i.e. shuttle service from and to the airports or arrival spots, accessible guided tour to the main tourist highlights of the surroundings and of the neighbour regions, wine tours and testing, educational tour with sommelier. Wheelchairs and other equipment can be borrowed free of charge. Moreover, the staff is also specifically sensitised and trained to match the needs of guest with mobility impairment.

Monitoring the success factors reveals the following findings:

1. Commitment of decision-makers

- The aim of the propriety was since the beginning to allow the members of AISM and their families to enjoy an active and relaxing holiday in the wonderful Tuscan setting. Accessible tourism for people with mobility impairment was (and still is) the goal of the propriety.

2. Coordinating and continuity

- The propriety has started since some years to become mainstream and to open up to the market, national and international. In this respect, they have already gained a lot of new tourists. To go further in this direction, they have the intention to start renovating some of the rooms in the direction of Design for All, thus maintaining the high accessibility level that they already have.

3. Networking and participation

- The Restaurant I Girasoli and the all Casa Vacanze belongs to the Network of AISM properties likehome.it.
- It is also included in the Network Village4All, a Quality Brand Hospitality for All that performs accessibility surveys and makes the information freely available on their website.
- It is also member of ENAT - European Network for Accessible Tourism (non-profit association).
- The facility is also present on booking.com, expedia.com and other national and international tourist booking internet portals.

4. Strategic planning

- The property's commitment to accessibility is based on social reasons.
- The further steps towards a more accessible offers will be:
 - Providing more fittings and facilities for guest with different disabilities
 - Re-designing in a more appealing way the accessible rooms.

5. Qualification and knowledge transfer

- Staff have been trained in services to fulfil the needs of guests with disabilities

6. Communication and distribution

- The link www.igirasoli.ar.it/ provides information on accessibility of the Casa Vacanze and the restaurant.

- Information about the accessibility of the property are available on www.likehome.it and http://www.villageforall.net/en/italia-toscana-croce_di_lucignano_arezzo-villaggio_accessibile-casa_vacanze_i_girasoli/
- They carry out promotional activities through specific events and tourist promotions.
- For some years the property has been to the national and international mainstream market

7. Improvement of resources and capabilities

- Networking and collaboration

Drivers & Obstacles

Drivers

- Constant engagement
- Opening to mainstream tourism having accessible facilities leads to positive results

Obstacles

- The house is clearly devoted to guests with disabilities. This may lead to a social segregation of guests.

Further comments

- The management has also to opened other facilities (i.e. the swimming pools) to the citizens of the surrounding area and it is also organising events open to all (aqua gym courses and other special events).

Figure 22 – Girasoli restaurant (Photos: <http://www.igirasoli.ar.it>)



4 Analysis of the case studies

To analyse the case studies the available information about organisation and actions were collected and the results grouped according to the already mentioned 7 ISF.

To render the analysis easier to understand we have grouped the case studies in a table that state whether in each case the available information tends to confirm “X” or refute “O” our hypotheses:

H21: In mainstream tourism services investment in accessibility results in increased client numbers.

H22: Destinations that take care for accessibility usually are focused on service quality in general.

H23: The successful accessible destinations show some kind of cooperation among service providers.

H24: Some destinations succeed in including accessibility, comfort and services in their branding.

In the same row the 7 ISF have been listed to show if each of the Success Factors has been well developed “X” or neglected “O” (Figure 23).

Figure 23 – Case studies and success factors

CASE	H2 1	H2 2	H2 3	H2 4	1 ISF	2 IFS	3 ISF	4 ISF	5 ISF	6 ISF	7 ISF
Erfurt	x	x	x	x	x	x	x	x	x	x	x
Acc. Poland	*	o	o	x	x	o	o	o	o	x	o
Château	x	x	x	x	x	x	x	x	x	x	x
Wine Cellar	x	x	o	o	x	x	x	o	x	o	x
Berlin	x	x	x	x	x	x	x	x	x	x	x
Barcelona Metro	x	x	x	x	x	x	x	x	x	x	x
Scandic	x	x	x	x	x	x	x	x	x	x	x
GVAM	x	x	x	x	x	x	x	x	x	x	x
Rest. Monnalisa	x	x	x	x	x	x	x	x	x	x	x
Rest. I Girasoli	*	x	x	x	x	x	x	x	x	x	x

*H21 is not applicable to these cases as they do not address mainstream tourism.

Figure 24 shows if the cases provided economic data or comments that allow an understanding of the return on investment, their approach to tourism (more mainstream oriented or disability oriented), whether they use accessibility as a marketing tool and the perceived economic results.

Figure 24 – Case study analysis

CASE	€ Data	Approach	Marketing accessibility	€ Results
Erfurt	Some	Mainstream	Yes	Good
Acc. Poland	No	Disability	Yes	Poor
Château	Yes	Mainstream	Yes	Good
Wine Cellar	Some	Mainstream	No	Good
Berlin	Some	Mainstream	Yes	Good
Barcelona Metro	Yes	Mainstream	Yes	Good
Scandic	Yes	Mainstream	Yes	Good
GVAM	Yes	Mainstream	Yes	Good
Rest. Monnalisa	Some	Mainstream	Yes	Good
Rest. I Girasoli	No	Disability/Mainstream	Yes	Good

The data analysis shows that although the initial intention was to select only cases with a mainstream orientation a closer analysis reveals that in one case, Accessible Poland, the approach is disabled guest oriented towards guests who have disabilities while in the case of the Restaurant I Girasoli they have been disability oriented although recently they are evolving to a more mainstream approach to improve their economic results. Due to the lack of orientation towards mainstream tourism the Hypothesis H21 can't be confirmed in these two cases.

In the cases of Erfurt and Berlin the lack of available economic data is understandable as the investments for improving accessibility are assumed by many public and private operators in an isolated way.

In the case of St. Martin Wine Cellar it was only possible to obtain indirect data about guests received without indication of the evolution of these numbers. We estimate that there are two reasons for this: their main activity is to produce and sell wine, the visits being a marketing tool and, on the other hand, the small investments done to improve accessibility are considered by them as valuable for all guests as they are not especially focussed on disabled guests.

Finally in the Restaurant Monnalisa case the economic data cannot be concretised as they have designed and built the property to be accessible from the beginning and therefore no special investment was made although they declare that more investment should be made without defining its amount. We have also been unable to obtain data about the increase in guest numbers.

5 Conclusions

The hypotheses status confirmed for the analysed cases:

It has emerged that the increase in guest numbers consists not only of disabled customers but of customers in general.

It has emerged that in most cases accessibility is integrated as part of the quality policy.

It is clear that cooperation with other local service providers is close success is greater although if cooperation is not close, but the provision of accessible services is assured along the tourism chain the results are also good.

In most of the cases the way of including accessibility in their advertising tools is as a characteristic or service included among others emphasising more what they offer than to whom the offer it. The style is always positive and avoiding “charity or social service” style language.

- Accessible Poland Tours is not a mainstream service. Their economic results are not good
- I Girasoli is evolving from a disabled marketing orientation to a more mainstream orientation. Their economic results are improving.
- It is more likely that a business will succeed if the management are professionals in their sector with awareness of accessibility needs rather than being disability professionals running a tourism business.
- All the cases that show good economic results and that communicate their offer efficiently have been managed well each aspect of the 7 ISF:

Although social responsibility is a motivation it does not make the company deviate from its own business focus.

The engagement and training of all the staff is a key issue that improves results.

Knowledge transfer flows more easily when the organisation is part of a number of professional networks such as Design for All.

To plan the actions and anticipate the results before starting is also a key element of success.

The importance of investment varies largely depending on the type of services provided and whether the accessibility improvements have been included since inception, have been planned or have been made in response to demand. But even in the case of the highest investment among the cases discussed, 17.1M€ invested by FGC in stations' accessibility, which resulted in an investment of 1.36€ for each new passenger in the following year, this implied a payback in less than two years, based on an increase of 16% in passenger numbers as estimated by the company. This example, together with the others from cases from which we have obtained concrete economic data, allow us to conclude that planned and reasonable investments pay back in a short period if the 7 ISF has been correctly addressed.

Finally it should be underlined that all cases that have succeed in managing the 7 ISF have validated all the working hypotheses proposed.