

TOURISM FOR ALL

The situation in Austria and success factors, presented on behalf of case studies from rural areas.

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Statutory Declaration

“I declare in lieu of an oath that I have written this bachelor thesis myself and that I have not used any sources or resources other than stated for its preparation. I further declare that I have clearly indicated all direct and indirect quotations. This bachelor thesis has not been submitted elsewhere for examination purposes.”

Date: 16.04.2010

Signature

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LIST OF ABBREVIATIONS

AGR	Aktion Gemeinsames Reisen
BGStG	Bundes-Behindertengleichstellungsgesetz, BGBl. Nr. 82/2005, entry into force on 1 January 2006
BMWFJ	Bundesministerium für Wirtschaft, Familie und Jugend
BSGH	Behinderten-Selbsthilfe-Gruppe Hartberg
BTI	Barrierefreier Tourismus Info
DRS	Deutscher Rollstuhl Verband
EU-SILC	European Union Statistics on Income and Living Conditions
ENAT	European Network for Accessible Tourism
IBFT	Infoplattform Barrierefreier Tourismus
ICT	Information Communication Technologies
ÖHTB	Österreichisches Hilfswerk für Taubblinde und hochgradig Hör- und Sehbehinderte
OIB	Österreichisches Institut für Bautechnik
ÖNORM	Österreichische Norm
OSSATE	One-Stop-Shop for Accessible Tourism in Europe
UNO	United Nations Organization
USP	Unique selling proposition
WAI	Web Accessibility Initiative
WKO	Wirtschaftskammer Österreich

ABSTRACT

This thesis has the goal to define the principle of accessibility and how it is implemented in the Austrian tourism accommodations. Because hotels in urban areas are often restricted to corporate policies with origin in other countries, like the United States of America, the main focus in this thesis is given on rural regions. Further, actual statistics about the situation of disabled people in Austria are presented. There is an overview about the current legal situation in Austria and the market segment 'disabled tourist' is examined. The main points of emphasis are travel behaviour and demand types. This allows recognizing if there is a market potential and what are the needs. Case studies of barrier free accommodations are presented, from farm holidays to hotels, to cover a large range. Additionally success factors and possible improvements suppliers and federal or national administration could carry out are identified and explained.

Literature research was used for the statistics, legal situation and the market segmentation. This allows getting a good overview without extending the length of the paper. For the case studies websites and brochures of the accommodations have been consulted. Some of the suppliers gave insights in their experiences and future expectations by personal communication with the author. An interview with an expert from the field gives an even deeper insight in the subject.

The results showed that there is a high market potential that is not yet covered by the Austrian tourism suppliers in an adequate way. There are offers in all categories but compared with the high number of tourism facilities in Austria, the percentage of accessible accommodation is quite low. First steps by government and marketing associations are done, but at the moment this can be observed to be very much theoretic.

It can be said, that Austria might experience difficulties in developing Tourism for All because the administration and marketing efforts are very much regulated on a federal base. There can be observed a lack of nationwide standards and certificates. Within the next years there is a lot to do, not only because of the legal requirements, but also because the Austrian tourism needs to find ways to attract other market segments to stay competitive. Tourism for All could and should be a topic when planning for the future.

1 INTRODUCTION

1.1. Problem statement

The tourism and leisure industry is one of the most important factors of the Austrian economy. In 2008 it made up to 16.1 % of the gross national product, which is an added value of about € 45.5 bn. It can be said that about every fifth full time job in Austria is generated by the tourism and leisure industry. More than 32 million arrivals and 126 overnight stays in 2008 make it clear that Austria is one of the leading touristic nations.

Of course the industry has to work against certain threats. Austria faces for example a reduced number of overnight stays because there is a trend to short breaks in the market. Furthermore, the availability of cheap flights with low-cost airlines made the traditional holidays by car less attractive for the customers in the German-speaking market, which is the main target market for Austrian tourism. (cf. Ribing; 2009, p. 3; Smeral, 2007, p. 48)

About 30 – 40 % of the European population would benefit from a higher accessibility of tourist facilities and services, but only a small proportion of suppliers really adapt to that. There is still a lack of hotels, transportation facilities and tourist sites which are physically accessible for disabled or elderly persons. One main reason for that might be that the governments do not develop enough policies and strategies, but also our society should take over some responsibility. (cf. Vos & Ambrose, 2008, p. 5-6)

According to a micro census in 1995 about 2 129 000 persons in Austria consider themselves as being physically impaired in a way. The demographic data show that our society is getting older and older, with the result that this number will increase in the next decades. Nowadays about 580 000 Austrians who have a disability would have the mobility to travel, and many of them would come with company. (cf. Berdel, Gödl & Schoibl, 2003, p. 10, 17-19)

The German platform *Barrierefreier Tourismus Info*, BTI, and the Austrian *Infoplattform Barrierefreier Tourismus*, IBFT, conducted different online surveys in the last years. The researchers do not claim that these surveys are representative but they allow getting an impression of the actual situation. One online survey from the years 2008/2009 came to the result that more than 80 % of all disabled people travelling are likely to do so with friends or family – so there would clearly be a

large market potential. In contrast to that, a survey under tourism organisations and associations showed that they do have some knowledge about accessibility items concerning wheelchair users but there is a real lack concerning issues of visually or hearing impaired people. Only about 7 % of their information centres are accessible for visually impaired or blind people. (cf. Laburda, 2009, p. 1-5; Laburda & Smikac, 2008)

Working as a travel agent the author faces the problems of disabled or handicapped people from time to time in professional life. The lack of adequate possibilities and awareness of the problems in all tourism sectors is evident. This thesis has the aim to summarize information about the current situation of the stakeholders, the expectations, needs and rights of the consumers and how the supply reacts or could react on them. In urban areas many international hotel chains are located which might be accessible according to corporate standards arising from states like the United States. Because of that reason the case studies in the paper are from rural areas in Austria and do not belong to standardized chains.

1.2. Research question and research aim

RQ 1: What is accessible tourism and who benefits from it?

RQ 2: What is the state of accessible tourism in the rural parts of Austria and how could it be improved?

RQ 3: What are the success factors when implementing accessible tourism?

The aim of this paper is to give an overview who is concerned from disability and to figure out what Austria and its accommodation suppliers already offer to this market and which improvements could be made.

1.3. Research method

Because of the limitations of the paper it was decided to collect data by the means of exploratory literature research. This allows giving a good overview over the existing state of demand and supply side of barrier free tourism. Further the details of the legislation concerning the topic accessibility can be described. Tourism is a very fast paced industry hence books and reports might be outdated short after they are published. And of course literature research enables the observation of only one part of the system, because tourism and leisure are qualitative experiences. Because of that reason it was decided to show the current situation in Austria on behalf of various examples for barrier free tourist accommodation. The ex-

amples are selected from platforms and special interest brochures. This qualitative approach gives the possibility to illustrate the theoretic part of the thesis.

Moreover interviews with experts of the field give insights that can not be found in the literature. Through the expert interviews and e-mail communication with tourism suppliers it is possible to find out why they did implement barrier free tourism in their facilities, what experiences they made with that and what expectations they have according to it.

1.4. Chapter outline

The first chapter gives an overview about the research problem, and why the author considers it to be important. Also the goals of the thesis are stated, and the methods to reach them are presented. Further it is explained why exactly these methods have been chosen by the author and how the thesis is structured in more detail.

The second chapter concentrates on disability in Austria. It explains the term disability and gives a statistical overview about disabled people in Austria and their living situation. Moreover, information about the legislation concerning barrier free tourism is presented. The third chapter deals with 'Design for All' and 'Accessibility', and gives explanations.

Within the fourth chapter examples for initiatives and platforms dealing with accessible tourism from governmental and private side can be found. These function as interconnection between supply and demand. Further the market segment 'disabled tourist' is explained with the focus on the travel behaviour and the various demand types of disabled people. To illustrate the current supply situation study results about the current supply situation are presented in addition.

In the fifth chapter case studies of accessible tourism suppliers in rural Austria are shown. These vary from hotels via private owned pensions to farm holidays, to cover a broad range. The chapter does not only give facts and data, it allows also insights why the suppliers started with barrier free tourism and gives the chance to get to know some of their experiences with it.

Chapter six states success factors and gives explanations why they are important. Additionally recommendations are given for the administrative level, which means regional and national politics and marketing. Further some rather simple measures are stated which suppliers could implement in their facilities to become more ac-

cessible for disabled guests. In chapter seven future outlooks from different views are presented. The chapter explains what plans exist from administrative side and how experts estimate the future development of accessible tourism from the administrative and the supply view.

Chapter eight summarizes the paper and presents conclusions drawn of the results found in the other chapters. Limitations of the research and the personal opinion of the author are presented. Chapter nine lists references used for writing the thesis.

2 DISABLED PEOPLE IN AUSTRIA

2.1. How to define disability

When drawing up resolutions on disability policy in 1988, the Austrian Parliament asked the federal government to subject definitions for the terms 'disability' and 'disabled person'. A symposium was organized on behalf of the Federal Ministry of Labour and Social Affairs. After careful examination the participants came to the conclusion that one standard definition that is binding in all laws is not possible, because there are so many overlapping areas. More than 90 federal and provincial laws deal with legal rulings significant for disabled people. Nevertheless the symposium brought up the two following broad definitions the federal government and the provincial authorities should adhere to in their disability policies. (cf. Rubisch, 1993, p. 6)

"Disabled persons are persons of all ages who have a permanent and substantial physical, mental or emotional impairment in an area of social relationships important to their everyday lives. Persons who are threatened with such impairment in the foreseeable future are also regarded as disabled. Areas of social relationships regarded as vital are childrearing, education, employment, other occupations, communication, living and leisure activities."(cf. Rubisch, 1993, p. 6)

"Disabled persons are those persons who are not able to

- sustain regular social relationships,
- acquire and perform gainful employment and
- achieve a reasonable and adequate income without assistance."

(cf. Rubisch, 1993, p. 6)

2.2. Statistical overview

To find out current data about how many people suffer from disabilities and what problems arise in their everyday life, the Ministry of Labour and Social Affairs and Statistik Austria conducted a micro census in regard to this topic. Between October 2007 and February 2008 a sample of 8 195 randomly selected people in private households answered the questionnaires. Those who responded positively on the first questions ('Are you restricted in your everyday life because of health rea-

sons?’ and ‘Do you suffer from those handicaps for more than 6 months?’) were asked for further details. (cf. Bednar et al., 2009, p. 7)

The results showed that more than 20 % of all respondents or estimated 1.7 million Austrians suffer from a lasting handicap in any form, from reduced eye sight to complete immobility and psychic problems. The older the respondents, the more handicaps they stated. The highest value was reached at people (men and women) older than 60 years. In younger years men are slightly more affected by disabilities, above 60 years the female population shows more health problems. About 13 % of the population in private households, around 1 million Austrians, suffer from any type of restrictions in their mobility. 4.3% have very strong handicaps in their mobility. (cf. Bednar et al., 2009, p. 10)

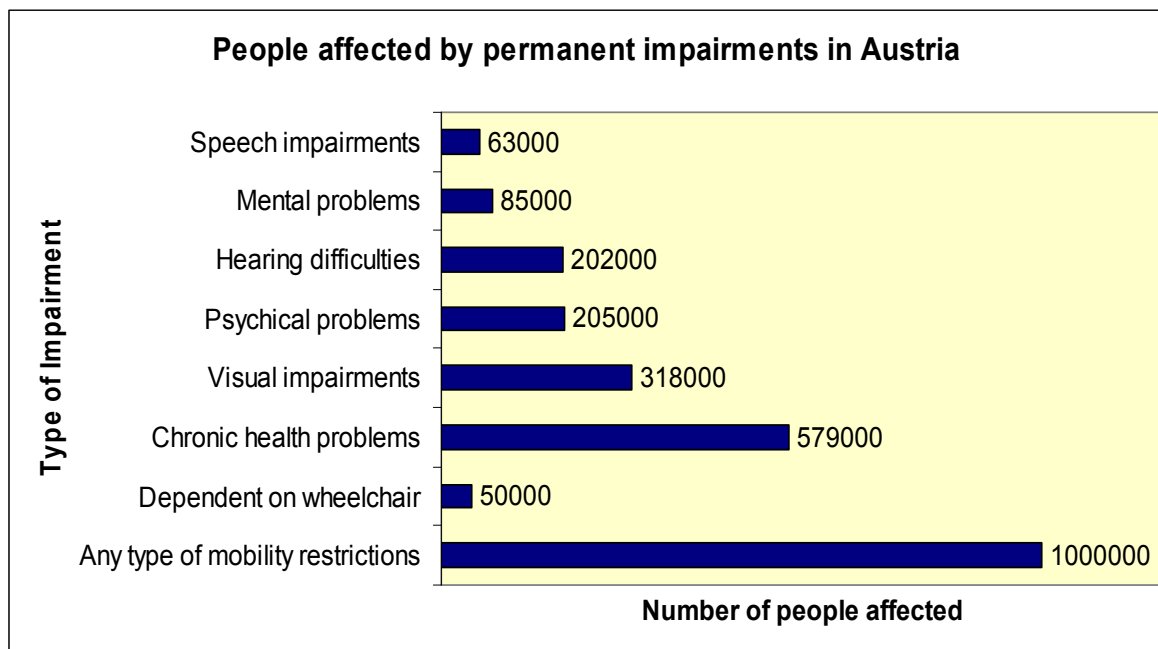


Figure 1. Own illustration after Bednar et al., 2009, p. 9-12

As can be seen in figure 1, about 50 000 people have to use wheelchairs. 579 000 people suffer from chronic problems like allergies, asthma, diabetes and pain. 318 000 people are affected by visual impairments. This number does not include persons who can help themselves with glasses, contact lenses or other seeing aids. The group of people suffering from psychical problems is the next highest with 205 000. The number of people with serious hearing impairments is quite low but 202 000 people in Austria have hearing difficulties. About 1% of the population, 85 000 people, has mental or intellectual impairments. Around 63 000 Austrian people do have speech impairments. Naturally, it is possible that one person suffers from a

multitude of handicaps. In Austria the number lies at around 580 000 multiple handicapped people. (cf. Bednar et al., 2009, p. 10)

Another survey was conducted in 2006 according to the standards of the European Union, the Statistics on Income and Living Conditions or short EU-SILC. Although the formulation of the questions has not been exactly the same in this survey, the results were similar to a great extent with the Austrian micro census. According to the EU-SILC about 630 000 people in Austria are considered to be disabled in the narrower sense. This means that they can not perform their daily workload without feeling to have a strong handicap. About 1 million people are disabled in the wider sense, they are chronically ill, but are not handicapped by this in their performance. (cf. Bednar et al., 2009, p.9-12)

Actually it is not possible to draw a clear line at where disability begins. However, people might be disabled in one way but have exceptionally high abilities in other sectors. Sometimes people have only temporary physical limitations, and with increasing age people might also lose abilities. Hence, also other groups of the population can be described as having a limited mobility: elder people, pregnant women and families with children, people who suffer from the consequences of accidents or post operative impairments, illiterates or simply people carrying heavy luggage. The percentage of people born with limitations is very low, and considering that fact it can be said that everyone might experience some kind of disability in his life. In the micro census in 2007 people with disabilities who were asked their in which part of the daily life they face subjectively the most problems. More than 20 % stated that they constantly have problems in their leisure time and 16 % when using public transport. This shows that there is a need in our society to start seeing the built or social environment as the source of most problems and not the condition of a person. (cf. Bednar et al., 2009, p.12, 27; Buhalis, Eichhorn, Michopoulou & Miller, 2005, p.5-16)

2.3. Living situation

Figure 2 shows the different labour situation of disabled and non-disabled people in Austria (for males and females between 16 and 64 years). It can be seen that a large number of disabled people is retired or unemployed. The rate of employed people makes up about 67 % of the total population without disabled people, but only 34 % of the disabled population. However, these numbers are not only indicating integration problems, but allow drawing conclusions about the income situa-

tion as well. Compared to 22 % of non disabled people more disabled people, namely 34 %, are in the lower income segment. (cf. Bednar et al., 2009, p. 21)

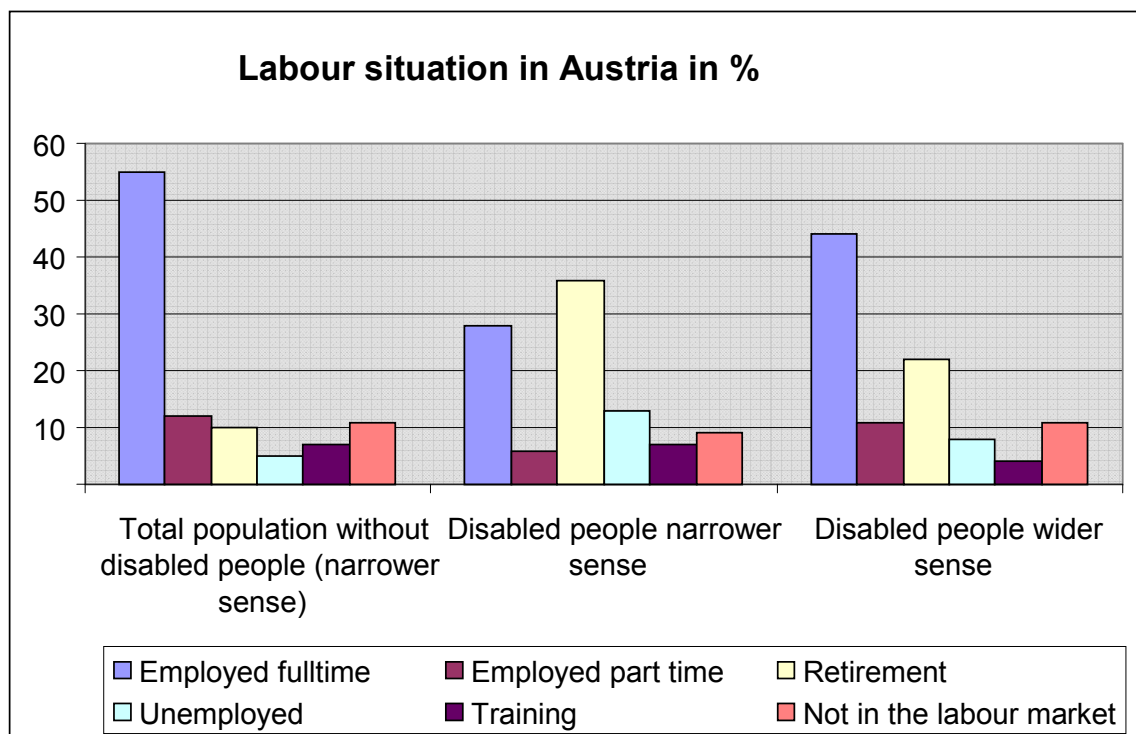


Figure 2. Own version after Bednar et al., 2009, p 19.

Surveys showed that the financial problems lead to social limitations. For example 21 % of the disabled people stated that they do not invite friends in their home because of their living situation. About 43 % do not go on vacation to save money. (cf. Bednar et al., 2009, p. 23)

Around 31 % of the disabled people in Austria live alone; the percentage is especially high for women over 65 years (52 %) and lower for people in the age between 16 and 64 years. 19 % of the men and 23 % of the disabled women live alone. The level of education shows significant differences between disabled and non disabled persons. Looking at all persons over 24 years in Austria, 51 % of the disabled population and 23 % of the non disabled population have finished their education with compulsory school. 40 % of the disabled, 51% of the non disabled population finished an apprenticeship or secondary school. Matura or University degrees are reached by 9 % of the disabled and 27 % of the non disabled population in Austria. (cf. Bednar et al., 2009, p. 15-17)

2.4. Legal requirements

Tourism companies in Austria are confronted with accessibility on different legal levels. Because of the limitations of this paper, the author will not go into deep and give just a short overview over the legal situation concerning accessible tourism. The term accessibility will be explained in chapter 3.

The United Nations Organization, short UNO, worked out the 'Convention of the Rights of Persons with Disabilities' to grant people with disabilities access to all human rights without discrimination. The prime focus was on the areas education, employment, health and access to information and public facilities. A special emphasis was laid on the needs of disabled women and children. On 13 December 2006 the United Nations General Assembly agreed upon the convention and the Austrian Social Service Minister signed it on 30 March 2007. In summer 2008 the Austrian government ratified the convention. (cf. Bednar et al., 2009, p. 73; Feyertag, 2006, p.1)

The Bundes-Behindertengleichstellungsgesetz, short BGStG, was developed to protect disabled people from discrimination in the state administration and in the access to public goods and services. Not only disabled persons are protected, also their relatives and in some cases third parties can fall under the protection of the law. People having a temporary impairment that lasts less than 6 months, are not protected by the BGStG. The most important point of the BGStG is that victims are enabled to file a claim for compensation. The BGStG has come in force on 1 January 2006. Within a ten years period existing buildings, traffic facilities and public transport facilities have to be adapted accordingly. Some exceptions are made for buildings where the adaptation would contradict with the regulations for preservation of an historic building. Also security reasons or if it is possible to prove that the adaptation would be an excessively burden could allow such an exclusion. New buildings have to be planned and build accessible from the beginning, although the law does not give special regulations how accessibility has to be converted in the practical construction. This is specified by each Bundesland in the building laws. Financial support is given to tourism companies by the government via the means of the Tourismusbank. (cf. Bednar, et al., 2009, p. 87; Bundesministerium für Wirtschaft, Familie und Jugend & Wirtschaftskammer Österreich, 2009, p. 6-9; Feyertag, 2006, p. 1-5)

Then there are two Austrian norms¹ that have to be considered. ÖNORM B 1600 'Principle for barrier free construction' is declared to be binding by each Bundesland. ÖNORM B 1603 'Planning principles for barrier free tourism facilities' is to use in combination with ÖNORM B 1600 only and a non-binding recommendation. Both norms are not declared to be binding by the, but this might BGStG be changed in the future. The norms themselves are revised constantly. Further there is the Österreichisches Institut für Bautechnik, short OIB, issued guideline 4 named 'accessibility and usage safety' which includes detailed rules concerning accessibility, and shall harmonize the building regulations. (cf. Bednar, et al., 2009, p. 87; Bundesministerium für Wirtschaft, Familie und Jugend & Wirtschaftskammer Österreich, 2009, p. 6-9; Feyertag, 2006, p. 1-5)

¹ The term 'norm' denotes a qualified recommendation. Norms have to be obeyed if declared to be binding by the government only.

3 Accessibility and Universal design

To be 'accessible' means that buildings, media products or services are designed in a way that enables everyone to use it without being restricted by impairment. Additionally to supporting people with permanent disabilities, individuals who are temporary injured or handicapped and the aging population could profit from a universal design and thus accessible facilities. The comfort would increase in general for all users. Still there will always people be who will never be enabled, simply because of their multitude of disabilities. This means that total accessibility can never be achieved. (cf. Bundesministerium für Wirtschaft, Familie und Jugend & Wirtschaftskammer Österreich, 2009., p. 2; Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 16)

A careful design is the fundament for accessibility. If the different needs of users are taken into account when planning a building, environment or product, so that no adaptations afterwards are necessary, this is called 'Design for all' or 'Universal Design'. (Vos & Ambrose, 2008, p. 11)

“The principles of universal design are thus essential in the development process of tourism products and services that can be used and enjoyed by all people of all ages and abilities, assuring that everyone attains a similar quality of life. Striving towards universal designs means accommodating the full range of limitations as well as the able-bodied. [...] Accessible features should be an expected part of every place, and should become an interwoven part of every facility, enhancing opportunities for the full range of users.” (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005p. 16)

To reach this, it is important to find out the actual requirements, come up with comprehensive standards and educate the general public about the basic concepts and impacts. Sometimes minor adaptations are enough for an enormous accessibility improvement of an object. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 16) Examples for improvements tourism suppliers could arrange are explained in chapter 6.2.

To enable an equal participation of all people in the society, barrier free buildings and outdoor facilities are the first step. Some important points to consider when planning barrier free are for example that access is possible without stairs, that the doors are at least 80 cm wide and that there are appropriate elevators and broad corridors. To think about the height of toilet seats, wash basins, electric outlets and switchers when installing them is essential. Furthermore, constructors should re-

duce doors where possible and plan fewer bearing walls, which will make future reconstructions easier. Moreover it should not be forgotten to install suitable lights and parking lots at the facility. (cf. Bundesministerium für Wirtschaft, Familie und Jugend & Wirtschaftskammer Österreich, 2009, p. 10-11)

4 TOURISM FOR ALL IN AUSTRIA

4.1. Initiatives and platforms

4.1.1. Workshops 'Tourism for all' by WKO and BMWFJ

In the year 2008 the Bundessparte Tourismus und Freizeitwirtschaft of the WKO, the Austrian Chamber of Commerce, started to plan workshops with the topic 'Tourism for All' in cooperation with the Bundesministerium für Wirtschaft, Familien und Jugend, short BMWFJ. The aim was to bring together all stakeholders to work together to raise awareness for the need for Tourism for All and for its importance. Guidelines should be established that enable decision makers, planners etc. to support the development in the right direction and to improve the existing standards. It was decided to install two workshops per year, one in spring and one in autumn. In January 2009 the first workshop took place. The participants were tourism and leisure suppliers, associations of disabled people and people who are personally concerned by disability. The participants were divided into four working groups, each accompanied and coordinated by employees of the ministry and the Chamber of Commerce. The groups deal with different topics: fundamental criteria for accessible construction, staff training and education concerning guest relation, accessibility in the internet and barrier free leisure offers. A core team, which also meets between the workshops to work on the projects, was nominated in each working group. At the first workshop a brochure about barrier free planning and building in the tourism and leisure industry was presented. In the next workshop in spring 2010 the fourth working group is going to present their results, an orientation guideline for accessible nature offers. In the future they are going to deal with providing disabled people with arts and culture. (cf. Aigner, 2010, p. 1)

4.1.2. Infoplattform Barrierefreier Tourismus

IBFT is a non profit initiative from the Österreichisches Hilfswerk für Taubblinde und hochgradig Hör- und Sehbehinderte, short ÖHTB, with the aim to interconnect the economic interests of the Austrian tourism with the interests of mobility impaired people. The initiative was developed because ÖHTB recognized that there are very few offers for disabled people in their leisure time. The association then rented the hotel Michelhof in Heiligenkreuz and reconstructed it accessible. At a workshop in the hotel the participants came to the conclusion that there are various initiatives in Austria for accessible tourism, but they are not connected and

because of that they are not consistent in the evaluation of accommodations. So the idea of creating an online platform came up, and 2004 the IBFT database went online. (cf. IBFT #FAQ, 2010; Laburda, 2010, p. 1)

First it was planned to provide information about tourism accommodations and a customer review section where people could to upload their personal comments and experiences about the hotels. But this option was not used frequently and often comments could not be published because of their content, so the function is not active any more. Now in addition to hotel information, users can inform themselves about accessible excursions and sights on the platform. Various guidelines, reports, forms for self evaluation, checklists and studies are provided. All information is based on self evaluation of the suppliers, and is not controlled by IBFT. The search function works by region or by type of impairment. (cf. IBFT #FAQ, 2010; Laburda, 2010, p. 1)

Further it was planned in the beginning to organize workshops and seminars about accessible tourism to provide tourism suppliers with information and education. The seminars did not attract many participants, although they were promoted via different channels like the Wirtschaftsförderungsinstitut. So nowadays the focus of the IBFT is concentrating more on the organization of events and workshops than on seminars. International networking is getting better and increasingly important. In September 2009 IBFT organized the conference of the European Network for Accessible Tourism, ENAT, in Vienna. The website of the initiative is designed accessible, which means that for example the font size can be changed by the users. Offering information in sign language is on the agenda of the initiative, but at the moment not possible because of financial reasons. In the beginning the Ministry of Economy financed the initiative, since 2008 it is supported by voluntary work and searches for sponsors. (cf. IBFT #FAQ, 2010; Laburda, 2010, p. 1-2)

4.1.3. Behinderten-Selbsthilfe-Gruppe Hartberg (BSGH)

The private association BSGH has the goal to help disabled people with competent information. Among other things they want to raise more awareness for the problems and to enable people with handicaps to participate in the society. A very important project for the association is barrier free tourism. Together with the Styrian Tourism Organisation, the Bundesland Steiermark and various regional tourism organisations they created a brochure that includes barrier free accommodations and restaurants and also information about sights in the region which are accessible especially for wheelchair users. Everything in the brochure has been

tested and categorized by the association. Region after region the different hotels, restaurants and sights are listed and presented with the most important facts. Contact details and exact measures that are important for wheelchair users are provided in the brochure. (cf. Behinderten-Selbsthilfe-Gruppe Hartberg, 2007, p. 2-5; bsg #Verein, 2010).

To facilitate the search, top equipped offers which are corresponding with the law are signified by three wheelchairs. Here everything can be used without help, and the furniture and sanitary equipment is barrier free. Besides that, there are additional barrier free offers available. Two wheelchairs implement that everything at the facility can be used without help, but the bathroom could be equipped with a bath tub. If the minimum demands are fulfilled the offer is marked with one wheelchair. Here a parking lot and an entrance without steps are given, room and bath are accessible with wheelchair, but there can also be a bath tub. Sometimes helping hands might be necessary in these facilities. Especially in this cases the association recommends to read carefully through the facts in the brochure. All information is also available online. (cf. Behinderten-Selbsthilfe-Gruppe Hartberg, 2007, p. 2-5; bsg #Verein, 2010) In 2001 the Austrian Social Ministry acknowledged the association with an award for offering services for barrier free tourism. (cf. Berdel, D., Gödl, D. & Schoibl, H., 2003, p. 125)

4.1.4. Steiermark für Alle

Because there are different marketing strategies in each Bundesland, the limitations of the length of this paper do not allow describing the efforts to attract tourists for accessible tourism of all. But to show an example one of the provincial tourism organisations was chosen randomly.

Steiermark Tourismus operates a website where among other topics, 'Steiermark für Alle' can be found. Steiermark für Alle gives information about accommodations, sights and excursions and according to what criteria they are accessible. Further the minimum requirements for each type of disability are stated. The user is able to change the font size according to his needs, which is only possible for this part of the website, not for Steiermark Tourismus in general. On the other side, the chapter Steiermark für Alle is available in German only, in contrary to the general parts of the website. To search appropriate facilities, the user can define regions or type of impairment. Figure 3 shows a screenshot to illustrate how the information about the fulfilment of various criteria is provided at Steiermark für Alle.

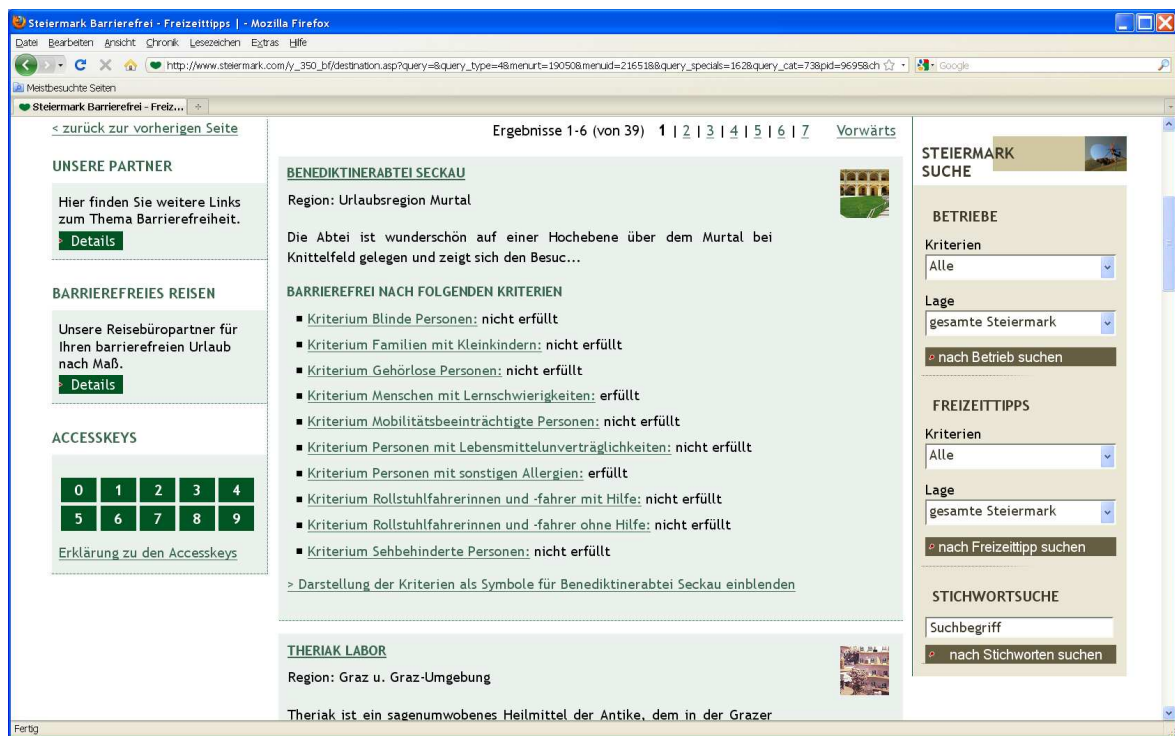


Figure 3. Screenshot from www.steiermark.com

Brochures with the same content can be ordered for free from Steiermark Tourismus. The website further provides links to partner initiatives and organisations, as well as to travel agencies which are specialized on disabled travellers. (cf. Steiermark Tourismus, 2009a, p. 1-35; Steiermark Tourismus, 2009b, p. 1-27; Steiermark #y350_bf, 2010)

4.2. The target market

4.2.1. Demand types

The European Commission estimates, that about 70 % of the disabled European population have the physical and psychical ability to travel, at least in theory. So Austria should take the possibility and become the leader in this market segment by understanding the accessibility needs and react according to it (cf. Bednar et al., 2009, p. 259). The market for accessible tourism is heterogeneous because every person has an individual level of impairment and thus different needs. People with a visual impairment might not have problems with a small threshold at an entrance but a wheelchair user might not be able to get over it (Vos & Ambrose, 2008, p. 9). Knowing the target group enables suppliers to deliver adequate products and services and to gain competitive advantage for their distinct customer segment. Figure 4 shows the seven main clusters that can be identified: mobility

impaired individuals, blind or partially sighted individuals, deaf or partially hearing individuals, speech impaired individuals, mental /intellectually impaired individuals, travellers with hidden impairments, and elderly individuals who suffer from one or more of the disabilities mentioned above. Further the key variations of demand types are demonstrated. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 51)

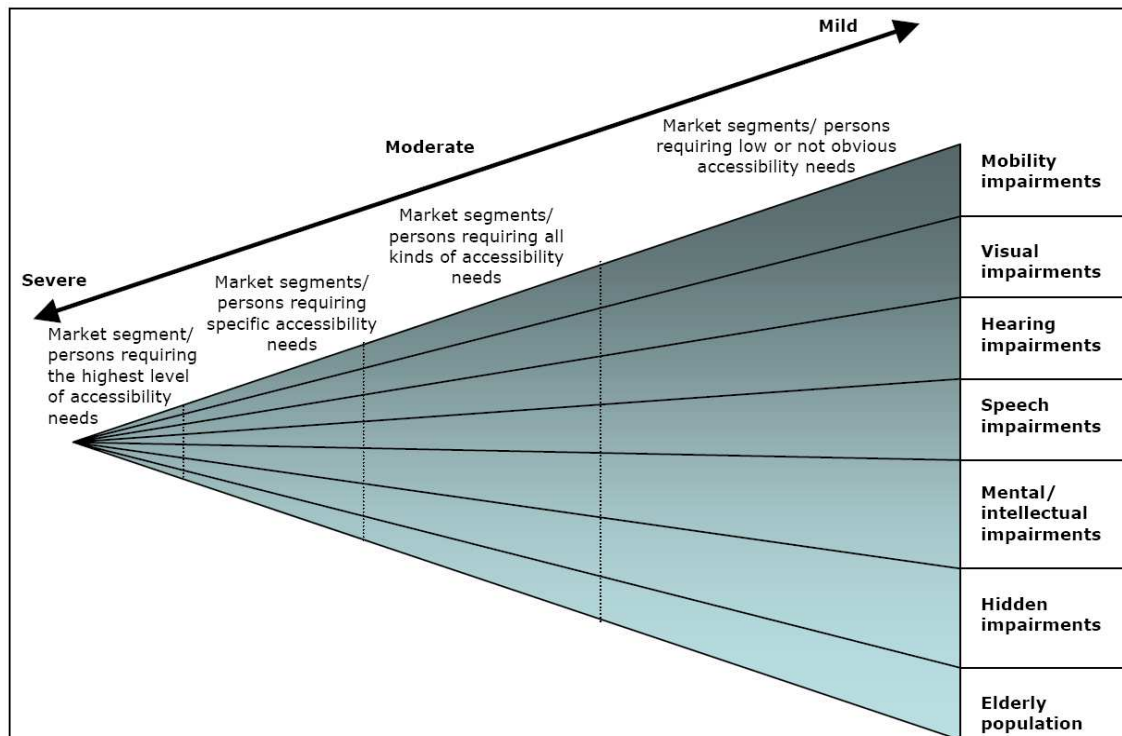


Figure 4. Source: OSSATE, Accessibility Market and Stakeholder Analysis 2005

As can be seen in figure 4, the travel and tourism industry faces a multitude of different requirements and information needs. Moreover there are different levels of requirements. Those individuals with low to moderate access needs make up the vast majority and could be served by mainstream providers who have adapted their facilities accordingly. Others, who have a higher requirement for accessibility, would need a more specialised provider with profound knowledge. On the other side specialised facilities might reject people with low or moderate accessibility needs, because they would feel stigmatised there. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 51)

According to a consumer study on behalf of Visit Britain in 2003, disabled consumers in the United Kingdom prefer accessible accommodations in the mainstream sector to those who explicitly name themselves specialist for disabled holidays because of the implemented high costs and segregation. (Vos & Ambrose, 2008, p. 15) This has also been observed in Austria, as the initiative IBFT tried to implement accessible tourism in a region in the Mur valley. Because of a famous

rehabilitation centre in the area the project tended to go into this direction after a while. This development was not welcomed very much by the disabled travellers and the IBFT. According to Mrs. Laburda, the project leader of IBFT, disabled travellers, or travellers in general, do not want to live as if they were patients in their holidays. (cf. Laburda, 2010, p. 6) These experiences illustrate the need for good market segmentation and implementation of inclusive design in tourism (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 51).

4.2.2. Travel behaviour

The information and planning phase is important for all tourists but especially when accessibility is a decision factor. Information given by suppliers is often incorrect or not reliable. Another often mentioned problem is the non-accessible design of websites or a lack of relevant information there. Surveys have shown that word of mouth is an important factor when deciding where to go. Of course, different types of consumers make use of different information channels. A high number of people rather not go on vacation if the information provided is not appropriate or seems unreliable. Consequently, it is important for suppliers of tourism facilities to provide detailed and truthful information for disabled customers in a variety of media to attract this market segment. The fewer barriers the consumer is confronted with in the booking process, the fewer opportunities for the supplier will be lost. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 57-59)

A study carried out in Germany on behalf of the ministry for economy and labour in the year 2003 gives more insights in the travel behaviour of people who are restricted in their mobility. With regard to short breaks and weekend trips of in average 3.6 days their travel intensity is the same as for non disabled people. This is different when watching at holiday making in general. Here the number is much lower. The mean duration of a journey is nearly the same when comparing disabled people with non disabled people. For disabled people in Germany the average is to go on holidays for about 13.9 days for about 1.3 times a year. 2.3 times a year they go on a short trip. These short holidays are most often city trips. This might be a consequence of the infrastructure in urban areas, which is more likely to be adapted to the needs of disabled people than rural areas. (cf. Neumann & Reuber, 2003, p. 8-9)

Nevertheless, the fundamental travel motives are not dealing with infrastructure. The most important motives stated by the disabled population are relaxation, a healthy climate, doing something for the own health, recharging one's battery and

experience nature. Travelling by car is preferred by all parts of the population. Particularly high with more than 70 % is this number when staying in the own country. Bus and Train are important means of transportation as well. At the destination public transport and the car are the most often used means of transport. Further two thirds of all disabled people state to also prefer to use the wheelchair or go by foot once they have arrived at the destination. (cf. Neumann & Reuber, 2003, p. 9-10)

Low season, especially the months May, September and October are the preferred time for making holidays by disabled travellers. A reason for that is definitely the independency of school holidays. The average budget of the disabled traveller is higher compared to non-disabled travellers. Further, nearly two thirds of the persons asked stated the willingness to pay more for additional accessible offers. Regarding their holiday destination disabled people prefer to stay in their home country more often than the total population. Older people are more likely to do so. (cf. Neumann & Reuber, 2003, p. 9-10)

This also reflects the experiences of the IBFT. As indicated by Mrs. Laburda it is important for younger people to be able to travel everywhere, while older people prefer the German-speaking areas. Here it can be observed that many Germans visit Austria but in contrary the Austrians prefer to stay in their home country although there are some very good accessible offers available in Germany. If going abroad, Italy seems to be the most interesting country for disabled travellers from Austria, while Germans prefer to travel to Spain. Also a trend to individual tourism can be observed. People want to travel with friends and families. Group travel is not the main form of travelling in this customer group but of course there should be possibilities for that as well. (cf. Laburda, 2010, p. 6)

According to the German study, assistance is needed by about half of the disabled travellers, mainly for mobility reasons. In about half of the cases family members take over this task. 20 % of the people affected have to enlist for payable services. However, around a quarter of all asked disabled persons stated not to need any help or special services. (cf. Neumann & Reuber, 2003, p. 11)

When travelling in their own country nearly half of the disabled guests decide to book hotels, followed by apartments and holiday homes. These numbers do not differ much from the non disabled travellers. When going abroad, the hotel gets more important for disabled guests, and this is a significant difference to the total population. Although there are tendencies towards barrier free accommodations,

still almost every second disabled traveller is confronted with accessibility problems in this sector. Figure 5 displays the range of restrictions in different segments of the tourism service chain. It can be observed that, concerning the gastronomy, where nearly no facilities are completely accessible, only 24 % of the respondents stated to experience restrictions. Especially blind and speech impaired people feel a lack of accessibility there. The low percentage can be put down to the fact that more than half of the respondents usually book half board, and many have help from their accompanying person. (cf. Neumann & Reuber, 2003, p. 18-19)

For most disabled travellers the sport facilities at the destination are not important for the decision making process when planning their holidays. Nevertheless the opportunity to practice sport as additional activity is seen as enrichment of the vacation. In this sector, barriers seem to be very common. Furthermore, service quality is a very important decision factor particularly for speech and hearing impaired people. This point is also explained in chapter 4.2. Barriers in the service sector have been stated by virtually every deaf respondent in the study. (cf. Neumann & Reuber, 2003, p.20)

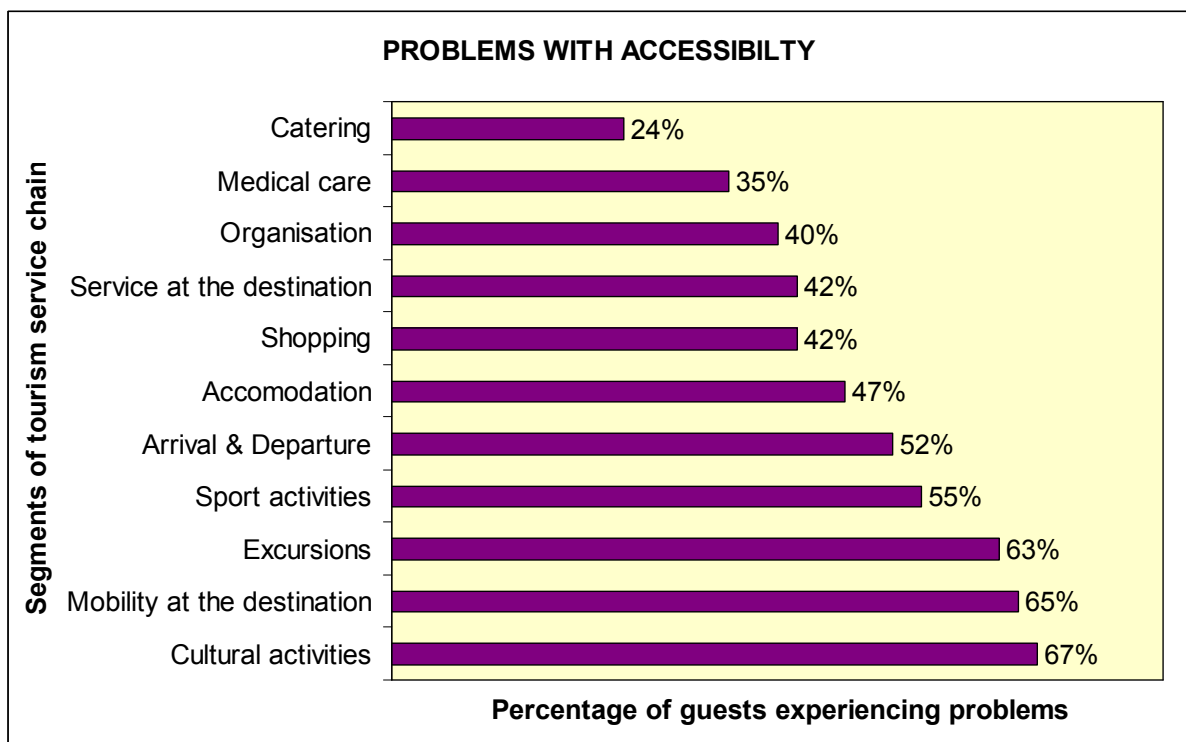


Figure 5. Own version after Neumann & Reuber, 2003, p 14

To not go on a holiday because of a lack of accessible services and facilities is not unusual for people with handicaps. If provided with appropriate offers and possibilities nearly half of them would travel more often. This potential market segment

should be served by tourism suppliers in all parts of the touristic service chain. Accommodation is the most important segment of this chain, but also mobility at the destination and accessible activities are crucial. Moreover a significant impact can be attached to the possibilities of arrival and departure. Naturally disabled travelers have also other interests when going on a holiday, but these fundamental points in regards to their handicap have to be considered in the planning. (cf. Neumann & Reuber, 2003, p. 11-13)

Thinking of accessible tourism as niche market would be an underestimation, considering that about 20 – 37 % of the population in the different European countries need accessible facilities. Because it is very likely that the disabled customer is accompanied by family or friends, there is an estimated multiplier effect of two that has to be taken in consideration. Usually disabled guests stay longer and if once satisfied with an accessible and welcoming destination, they are very likely to return. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 54-61)

4.3. Current supply situation

One-Stop-Shop for Accessible Tourism in Europe or short OSSATE is a project initialized by Greece and the United Kingdom. The aim of the project is to implement an online platform to provide information on accessible tourism facilities on an international base for all European citizens. (cf. Ambrose, 2006, p. 4) In 2005 OSSATE tried to gather data about the tourism supply in Europe. Five sources like national tourism organizations were contacted in every country. Because of the differences in the structure and format of the data provided, it was not possible to make an assessment that would allow direct comparison between the countries. The process further showed that the systems are set out so different in the countries, that it is not easy to find consistent data if it is existing at all. Because of that the numbers do not allow an accurate comparison, but give an indication of the actual situation. According to this OSSATE report there is an estimated amount of 1.4 % of all accommodations in Austria stated to be accessible. This number is very low compared to the average of 5.6 % of all European countries. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 74)

In 2007 Salzburg Research conducted a survey under 434 accommodation suppliers in the country Salzburg and came to the result that about 26 % of the suppliers have adapted their hotel barrier free in some way, but 60 % stated to have accommodated disabled people in the past. This leads to the assumption that disabled people do not only choose their accommodation because of the infrastruc-

ture but also the service and the soft skills of the staff are an important factor. Furthermore a large number of disabled guests might not have special accessibility needs, a point that was explained in chapter 4.2.1 in more detail. The researchers also found out that only a small number of suppliers are willing to adapt their facilities accessible in the future. About 60% are not sure or do not want to change anything. The highest willingness to further invest in accessibility is shown by suppliers who already have done something in this direction. In fact the legislation has given a period until 2016 to transpose the regulations of the Behindertengleichstellungsgesetz. The future will show how that works in practice. (cf. Markus, 2008, p. 6)

5 CASE STUDIES

5.1. Sporthotel Weisseespitze and the ski region Kaunertal

The hotel is located in the tyrolean Kaunertal and since the year 2000 all facilities are accessible by wheelchairs. 30 of the 80 rooms are adapted for wheelchair users. The bathrooms are equipped with specially lowered bath tubs or showers, the toilets are in a comfortable height. The rooms, public areas and garage are accessible without steps, all doors and elevators are wide enough even for electric wheelchairs. Assistance dogs are allowed in the hotel and the restaurant. Further, the mobility impaired guest has the possibility to choose from various activities. In the Spa area of the hotel a sauna is designed accessible. Hand bikes, monoskis, swiss tracks, off road wheelchairs or tennis wheelchairs are available for rent, and the hotel offers the possibility to repair wheelchairs on site. In a road book, which is specially prepared for wheelchair users, a broad range of hiking routes and cultural activities are included which are accessible by the different types of wheelchairs and sports equipment. Skiing classes for monoskiers, excursions, and rafting tours are offered as well. The hotel won several awards with his integrative approach of hospitality. In 2001 it got the state award for barrier free tourism from the Ministry of Economy. The Social Ministry carried out a contest for barrier free tourism in 2001, and Hotel Weisseespitze reached the third place in the category 'Suitable building measures for disabled people'. Others, like the Tiroler Integrationspreis 2002, Herz der Alpen, and Goldener Rollstuhl followed. Further hotel Weisseespitze is partner hotel of the DRS (Deutscher Rollstuhl Verband) since 2001. The marketing of the hotel is not only concentrating on accessible tourism, the efforts also go in direction family and motorbike travellers. (cf. AGR-Aktion Gemeinsames Reisen & Tourismus Servicestelle des BMWA Abt. V/3, p. 159; Berdel, D., Gödl, D. & Schoibl, H., 2003, p. 125-127; Prantl, 2007 p.1-3; Weisseespitze, 2010, p. 1-12; IBFT, 2010, #entry/70)

As example for barrier free tourism and integration the hotel did also influence its surrounding to a certain degree. Nowadays, Gletscherbahnen Kaunertal is not only popular amongst snowboarders, also monoskiers appreciate the region. The restaurant at the glacier was modernized for about € 1.0 m in the year 2002. Now the facilities are very spacious and each floor is accessible by elevator. Of course not only disabled guests profit from this adaption, also skiers prefer not to walk over many steps in their lunch break. The economic impact of the disabled ath-

letes is not estimated to be very high, because they and their accompanying persons pay children fares. Although courses for monoskiing, para ski training, rental equipment, and cross country skiing are available for mobility impaired guests, they make up around 2 % of the ski guests in the Kaunertal region only. (cf. AGR-Aktion Gemeinsames Reisen & Tourismus Servicestelle des BMWA Abt. V/3, p. 159; Prantl, 2007 p.1-3; Weisseespitze, 2010, p. 1-12; IBFT, 2010, #entry/70)

The website of the region gives information about the villages in the region, but also about barrier free sports activities. The user has for example the possibility to download maps for cross country skiing with handicap. Further, there can be found a link that leads the user to a website named 'Tirol ohne handicap'. This site was especially created to inform about barrier free activities and accommodation. Activities from hand biking over parachuting and more are presented. Additionally recommendations for barrier free excursions and accommodations for wheelchair users, blind or visually impaired people are provided (cf. Kaunertal, 2010, #barrierefrei; Tirol, 2010, #Ohne Handicap).

5.2. Glockenhof in Walchsee

The Apartments Glockenhof is located in Walchsee in Tyrol, and besides the accessible apartments also a garage for e-wheelchairs with 220 Volt outlets is available. Partner dogs are welcome. The non-smoking apartments are also equipped for persons who suffer from allergies. Information about various sports activities like bi- and monoskiing, sitting cross-country skiing or hand biking is provided. The owner, Mrs. Gruber is a qualified alpine-ski instructor for handicapped skiing. Equipment can be rented on request from a company in the region. (cf. AGR & Tourismus-Servicestelle des BMWA Abt. V/3, p. 183; Glockenhof, 2010, #Rolli-Infos, #Glockenhof, #Skikurse, #Allergikerinfos)

The database of IBFT rates the apartments as accessible for wheelchair users, mobility impaired people, visually impaired and blind people, hearing impaired and deaf people and people who have speech impairments. It is also recommended for families with small children, seniors and people with allergies. (cf. IBFT, 2010, #entry 514)

According to Mrs. Gruber the adaptation was a logical step, because all apartments are on the ground floor and there have always been requests from guests for accessible rooms. The adaptation process went well and she is satisfied with the outcome but because of the private character of the facility, no financial sup-

port by the government was given. The reactions from other guests and locals were mixed but in general positive. Most disabled guests are travelling with their family or partner, so there are not that much groups coming. The segment that makes use of the offered ski courses is quite small. (cf. Gruber, 2010, p. 1)

The village Walchsee, where the Hotel is located, has about 2000 inhabitants and is part of the district Kufstein in Tirol. There is not much information for tourists provided on the website of Walchsee, but a link to the touristic region Kaiserwinkl of which Walchsee is a member community, leads to more facts and offers. Barrier free tourism is not an issue on both websites. (cf. Walchsee, 2010, #Tourismus; Kaiserwinkl, 2010, #Kaiserwinkl A-Z)

5.3. Sägerhof in Tannheim

The hotel is located in Tyrol in the Allgäu region of the Alps, and besides other rooms it offers also four studios that are accessible for wheelchair users. The indoor pool is accessible without stairs. Around the hotels are more than 100 km hiking paths and 30 km bike roads that are also partly suitable for hand bikers. The parking lot is accessible with wheelchair and the toilet in the restaurant area as well. Public areas like lobby, restaurant, terrace, indoor pool and whirlpool are constructed barrier free. Interested users can download the report of an evaluation of a person who tests accessibility for wheelchair users. (cf. Sägerhof, 2010, #Barrierefreiheit; AGR, & Tourismus-Servicesstelle des BMW Abt. V/3, p. 179)

According to the owner, there occurred many complications within the adaptation process when he reconstructed his hotel partly barrier free. He does not plan to invest more in this direction because of the problems and a lack of interested tourists. The guests who use the accessible facilities are mostly Swiss groups and German families, the staff is not especially trained but they do have a good relationship with the guests. Still, some other guests do comment negatively on the accessibility adaptations and disabled tourists. In his experience, wheelchair users can access the nature easily. Hotel guests do often use Swiss-tracks to get around in the valley and the mountains for example. No special activities are provided by the hotel. (cf. Lumpert, 2010, p. 1)

Tannheim is the main municipality in the valley with about 1000 inhabitants. The website of the region provides information about the nature protection area 'Natura 2000' and the cable car that allows enjoying great panoramic views. No special

information about barrier free activities is given on the website. (cf. Tannheimertal, 2010, #Sport und Freizeit)

5.4. Hotel Restaurant Viktor in Viktorsberg

Located in the Bregenzerwald region in Vorarlberg, the hotel offers 18 single rooms and 6 double rooms which are adapted according to accessibility. The hotel offers a shuttle service with a bus for eight people from and to the hotel. The indoor pool is accessible for wheelchair users, and various medical therapies are offered in cooperation with Vorarlberger Lebenshilfe. In the elevator Braille-Information is available, and there is an accessible toilette in the restaurant area. (cf. Tiscover, 2010, #viktor; AGR & Tourismus-Servicesstelle des BMWA Abt. V/3, p. 227) The hotel reached the first place in the category 'Building measures suitable for disabled people' a contest the Social Ministry organized in 2001. (cf. Berdel, D., Gödl, D. & Schoibl, H., 2003, p. 125)

On the IBFT database Hotel Viktor can be found when searching for accessible hotels for wheelchair users, mobility impaired people, visually impaired and blind people, hearing impaired and deaf people, speech impaired people, families with small children, seniors, people suffering from diabetes or are in need of other special diets and people with allergies. The database also rates the hotel as accessible to a certain degree for mentally impaired guests (cf. IBFT, 2010, #entry/488). According to the hotel the adaptations necessary were done in the year 1999, and the hotel is also used for on-the-job-training and education of disabled people. The other staff has pedagogic knowledge. The hotel is mainly booked by groups with disabilities but also seminar guests, cultural tourists and skiers. The general feedback from disabled and non disabled guests is very good, but an increasing trend to accessible tourism is not predictable. (cf. Ellensohn, 2010, p. 1) Viktorsberg has about 380 inhabitants and is a very calm mountain village far from mass tourism. No information about barrier free tourism can be found on the website of the village. (cf. Viktorsberg, 2010, #Gemeindeinfo)

5.5. Vive Diem in Haus/Ennstal

The Vive Diem apartments are located between Haus and Schladming. The owner is wheelchair user himself since an accident some years ago. He had to experience lots of barriers in his own holidays. That is, why the family decided to build the apartments in the year 2006. They have been planned according to ÖNORM B1600 and B1603, but to offer even better accessibility than required by law, the

owners have refined the norms and extended the efforts. Vive Diem has been certified by Steiermark für Alle. In the report accompanying the certificate guests can find information to what percentage the apartments fulfil the requirements. 100 % have been reached for people who have mobility impairments, learning difficulties, visual impairments, hearing impairments or are wheelchair users or families with small children. For people with allergies against dust, pollen or animal hair the facilities are appropriate to 86 %, for blind people to 71 %. An information folder in Braille is available. The apartments offer spacious rooms and beds adjustable in height. Further the ski room, sauna, relax area and the indoor pool are accessible for wheelchair users. Special barrier free sports facilities for basketball or table tennis are provided. No information about barrier free excursions or activities in the region is presented on the supplier's website, but links to websites, studies and reports that might be interesting for wheelchair users. (cf. Schladming Ferienwohnung, 2010, #barrierefrei urlauben)

According to the IBFT database the apartments are accessible for wheelchair users, mobility impaired people, visually impaired and blind people, hearing impaired and deaf people, speech impaired people, families with small children, seniors, people suffering from diabetes, are in need special diets or dialysis and people with allergies. They are further considered to be accessible to a certain degree for mentally impaired guests. The hotel provides a special security suitcase for deaf people, including blinking signals and pillows that start to shake when a fire alarm goes off. (cf. IBFT, 2010, #entry/507)

In the first season about 10 % of the guests of Vive Diem had some kind of disability, in 2008 this segment made up already about 40 % of all guests. This shows that there are clearly additional chances for suppliers of tourism accommodations when providing facilities for disabled travellers. (cf. Bundesministerium für Wirtschaft, Familie und Jugend & Wirtschaftskammer Österreich, 2009, p. 15)

5.6. Dorfwirt Haus Aloisia in Mariapfarr/Lungau

According to the website of the hotel, the fundamental philosophy for the people working there is to offer carefree holidays without restrictions to anyone. They want their guests to feel understood in their needs but not stigmatised as disabled person. The hotel offers 28 rooms, 4 of them plus 1 apartment are adapted barrier free. A new elevator makes it easier for the handicapped guests to reach everything in the house. Upon request two way intercoms can be installed in the rooms. The staff is eager to help when planning activities. On the website of the hotel,

some links lead to destinations in the region that are barrier free. (cf. Haus Aloisia, 2010, #Urlaub ohne Einschränkung) The IBFT platform gives the information that the hotel is accessible for wheelchair users, mobility impaired persons, visually impaired persons, blind people, hearing impaired persons, speech impaired persons, families with small children, elder people, people who suffer from diabetes or are in need of regular dialysis, have allergies or are mentally impaired. Further, it is accessible until a certain degree for deaf people or people who need a special diet. (cf. IBFT, 2010, #entry265)

5.7. Urlaub am Bauernhof

5.7.1. General information

The Bundesverband Urlaub am Bauernhof is one of the holiday specialist of the Austrian National Tourism Organisation. Under the trademark 'Urlaub am Bauernhof' or 'Farm holidays' farmers can market rooms or apartments they offer for tourists. Because of the limitations of this paper the author will not explain the system of the holiday specialists in more detail. There are several different topics, like riding holidays, holidays with babies, biking holidays and barrier free farm holidays. Figure 6 is a screenshot that gives an impression about the information provided online.

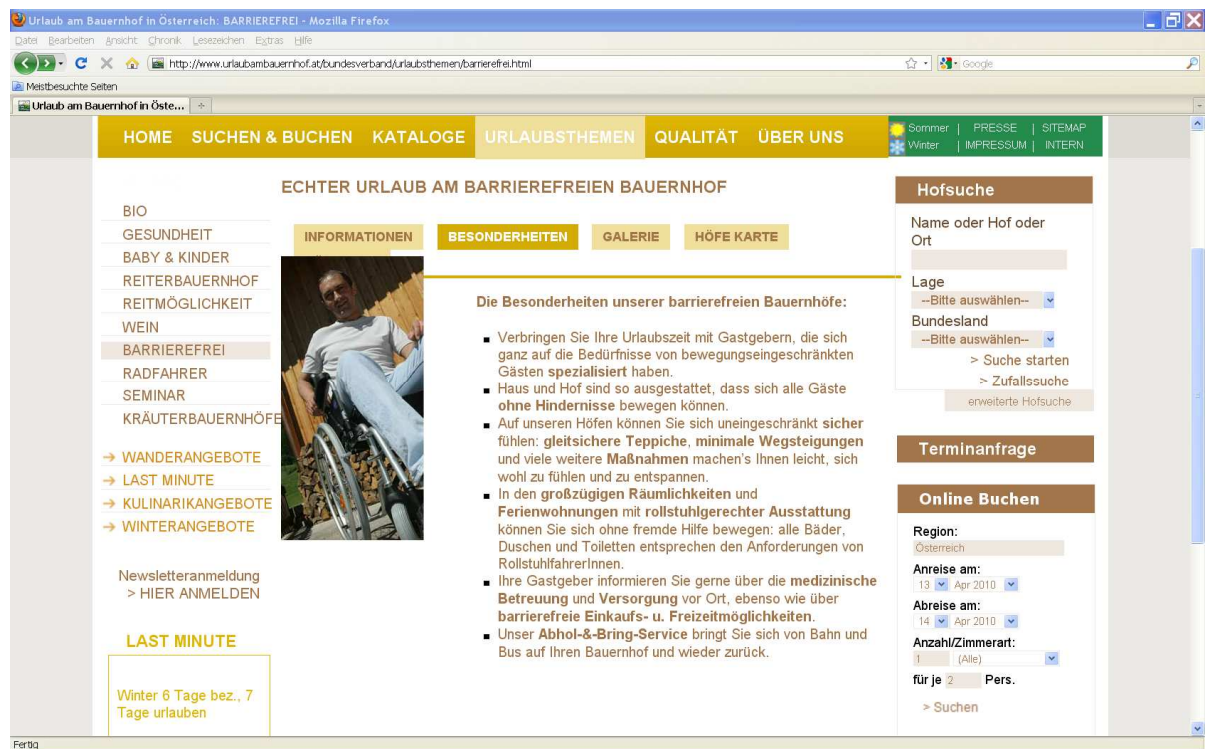


Figure 6. Screenshot from www.urlaubambauernhof.at

At the moment 32 barrier free farms all over Austria are presented via the website and a special brochure. The farms are presented shortly with the most important facts and contact details. Information about the offered activities, type of the farm and the infrastructure are given. Some of the farms do also market to other topics, like riding holidays or baby holidays.

Various criteria shall make sure that mobility impaired people can spend their holidays on the farms without needing helping hands. According to the brochure the criteria that have to be fulfilled by the suppliers are:

- parking lots near the entrance, ground level entrance or ramp
- even ways to move free in the area around the farm
- corridors that are at least 120 cm wide and doors 80 cm wide
- enough space in the rooms and apartments to move with a wheel chair
- easy to reach switchers, electric outlets, telephones
- individual regulation of room temperature
- safe floors without thresholds or projections
- absolutely no steps in the guest rooms and apartments
- stable furniture that is easy to reach and can be used by wheelchair users
- sanitary facilities that are adapted for wheelchair users
- easy to reach coat hooks and handles in the sanitary facilities
- kitchen counters in the apartments must be adjusted in height for wheelchair users
- information about medical support in the region must be provided
- at least two barrier free leisure activities for wheelchair users must be available at the farm

Urlaub am Bauernhof further gives information about arrival and departure possibilities with plane, train and individual transfer services. Contact information for railway service centres and for transfer services are provided. The farms are labelled with two, three or four marguerites, which signify the different levels of comfort of the guest rooms and apartments. The more marguerites a farm is certified

with, the higher the comfort and the better the equipment of the facilities. (cf. Bundesverband Urlaub am Bauernhof, 2010 p. 1-15) The Bundesverband Urlaub am Bauernhof was awarded with the third prize in the category 'Services suitable for disabled people' when the Social Ministry carried out a contest about barrier free tourism in the year 2001. (cf. Berdel, D., Gödl, D. & Schoibl, H., 2003, p. 125)

5.7.2. Examples

An example for a very well equipped farm would be the 'Guesthouse Advinum' in Lutzmannsburg. The winery offers a house that is completely accessible for wheelchair users from the wine cellar up to the rooms. Even a walk through the vineyard is possible without barriers. When planning the guesthouse the owners visited many different accommodations and realized that only a few offers for barrier free tourism exist. Also in their personal surroundings they saw the difficulties handicapped people have when searching appropriate holiday offers. Further they wanted to create a unique selling proposition (USP) to their competitors and to attract also families with small children. About 5 % their guests are handicapped. There are some Heurigen in the region that are accessible, and the thermal bath in Lutzmannsburg or a tour with a rail trolley might be interesting alternatives to spend the leisure time as well. (cf. Bundesverband Urlaub am Bauernhof, 2010 p. 8; Schlögl, 2010, p. 1)

Another example is the farm of family Flucher-Plaschg in Straden. A family member in the house became a wheelchair user and that made the owners aware of how many problems arise if doors and bathrooms are not accessible. So they created an apartment accessible for wheelchair users in an empty farm building. The outdoor farm area and farm shop are accessible for wheelchair users, as well as are shops, restaurants and thermal spas in the region. More and more guests with handicap make use of the offer. The farm has is certified with four marguerites from Urlaub am Bauernhof. (cf. Bundesverband Urlaub am Bauernhof, 2010, p. 10; Flucher, 2010)

The owners of the Buchgrabenhof in Minihof-Liebau decided to get barrier free because of a lack of offers in the region. The farm is signified with four marguerites from Urlaub am Bauernhof. The barrier free apartment is often booked by different care centres for disabled people. Most of the guests search for relaxation, but especially those with handicaps are more active than others. Paved cycle tracks and accessible thermal spas make activities in the region possible for disabled people.

(cf. Bundesverband Urlaub am Bauernhof, 2010, p. 8; cf. Knausz & Knausz, 2010, p. 1)

Mrs. Bender who owns Landhaus Bender in Straden saw the potential to attract more customer segments, and because of that she decided to adapt one apartment barrier free. The farm has reached four marguerites from the Urlaub am Bauernhof certification. The outdoor area is accessible with wheelchairs. The guests can observe different farm tasks and trades and are very interested, they especially like the animals. A paved cycle track is directly next to the farm and various gastronomic facilities, thermal spas and museums in the region are barrier free. Mrs. Bender has the impression that the acceptance for people with physical disabilities is much higher than for people with mental impairments. Because of that it is important for her to inform other guests when a group of mentally impaired guests has booked for the same period, sometimes no other bookings are accepted for that time. In her opinion people with disabilities have more mobility than some years ago, and she discovers an increase in her booking numbers because of that. (cf. Bundesverband Urlaub am Bauernhof, 2010, p. 11; Bender, 2010, p. 1)

The Baby- and Kinderbauernhof Scharrerhof is specialised on families and is signified by four marguerites from Urlaub am Bauernhof. The owners wanted to enable also families with a member with special needs to find a nice holiday destination. The guests are very active and barrier free activities in the nature are possible in the region. Next to the farm there is a nature lake for swimming, and a large playground is available. A restaurant in short distance from the farm is barrier free as well. (cf. Bundesverband Urlaub am Bauernhof, 2010, p. 12; Kaltenhauser, 2010, p. 1)

6 SUCCESS FACTORS AND RECOMMENDATIONS

6.1. Success factors on political level

A German analysis of various model regions and different political approaches allowed to identify the main success factors for implementing barrier free Tourism for All. There is no doubt that success is also dependent on given local conditions, so there might be different ways that lead to success. Because of the complex network of tourism and politics the factors are often interrelated. Commitment of political decision makers can highly influence the success of a project. If a decision maker is aware of the economic and socio-cultural importance of accessible tourism, he is able to influence other stakeholders positively, by means of direct or indirect support. For example could the application of Design for All could become a criteria for receiving concessions or financial help from the government. On the local level it might be easier for tourism suppliers who want to become barrier free if support from administrative or political comities is given. Additionally decision makers of a tourism destination are often observed to be the main drivers of project success. A person that coordinates and supervises the implementation process can be contact person for tourism suppliers and regional tourism organisations. This people are often working voluntary in this field, because there is a lack of financial means. To grant qualified coordination it is recommended to install a coordinator in the regional or local tourism organisation and finance the position by public means. This can also influence the continuity positively. . (cf. Neumann, Pagenkopf, Schiefer & Lorenz, 2008, p. 79-83)

Continuity is a success factor that can be reached by defining a budget and constant transposition of 'Design for All' in projects and programs. Good networking does not only include all suppliers along the touristic service chain. Also planners, architects, experts, decision makers in the administration and of course disabled people should be part of the network. It is recommended to facilitate the development of such networks. This is already done by the Austrian government to a certain degree as is described in chapter 4.1. If all stakeholders are identified and involved, concrete duties and tasks should be given to the participants and their activities should be interconnected. (cf. Neumann, Pagenkopf, Schiefer & Lorenz, 2008, p. 79-83)

Strategic planning that involves all stakeholders is another important success factor. A careful examination of the state of the art, market segments, strengths and

weaknesses, competition etc. is the first step. As can be seen in chapter 7.1, Austria has issued a tourism strategy in the last months. Now it would be important to create an activity and time plan, to decide which concrete measures have to be taken and how these are financed. To reach success permanent quality control is essential. Further it makes sense to implement accessibility as requirement in public invitations to tender. (cf. Neumann, Pagenkopf, Schiefer & Lorenz, 2008, p. 79-83)

Experience shows, that qualification of staff by the means of training and education are key criteria for success. However the problems arising between guest and service personal are often based on simple insecurities. To train staff and decision makers in regards of the needs of disabled guests is especially effective if it becomes part of the existing education system. This method is named mainstreaming. Moreover, it is important to exchange experiences with accessible tourism with other regions and countries. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 20-23)

In addition to the service offered at a destination of course also the infrastructure is a success factor. First the needs of a destination have to be identified and solutions developed. Touristic offers and services along the whole touristic service chain should be created or reconstructed to be accessible. It is recommended to plan a budget for the provision of financial and personal resources for this process in successful regions. A model region or a special training program could have a very good effect on the suppliers and decision makers, and create a higher demand. As can be seen in chapter 7.1 the general idea of creating such a model region is mentioned in the Austrian Tourism Strategy. ((cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 20-23)

Also special interest brochures are observed to be very helpful. The Internet is becoming more and more important for economic success, as explained in more detail in chapter 6.2. Communication is a main success factor and continuing publicity through media work and events is essential. Accessible products and services should be marketed in regards to the diversity of customer needs and along the whole touristic service chain. It is suggested to implement 'Design for All' in the complete marketing process. (cf. Neumann, Pagenkopf, Schiefer & Lorenz, 2008, p. 79-83)

Summarized it was emphasized (Neumann, Pagenkopf, Schiefer & Lorenz, 2008, p. 130) that the following fundamental points should be considered when implementing accessible Tourism for All:

- Nationwide implementation of training and qualification programs
- Nationwide-standard quality criteria and certification
- Integration of the topic 'Tourism for All' and quality control in the national tourism policies
- Integration of the topic 'Tourism for All' in the Marketing

6.2. Possibilities for suppliers

As tourism is a chain like system with many interrelations between the segments involved, accessibility is not only linked to physical access but to all components of a travel experience. Starting from the access to information about a destination or hotel, via booking, transport, accommodations, attractions, activities, staff, meals etc. a lack of accessibility in one segment can influence the travel experience as a whole negatively. So it is essential to identify all parts of the tourism industry that need to be accessible, and to be aware also of the interconnections of these. Detailed information about accessible ways between attractions and accommodations is as crucial as to provide barrier-free hotels and venues. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 20-23)

According to the type of their impairment individual tourists are not all affected by the same type of physical access barriers. Because of that it can be said that a key quality criterion is comprehensive information about facilities that is communicated to all potential customers. There are some prerequisites that have to be met to establish barrier-free tourism. Sensory access for people with hearing or sight impairments and communication access which helps people with language problems are also forgotten often. Further, a hotel which is completely adapted to the needs of wheelchair users but does not offer possibilities for accessible activities in the surrounding region might not be successful because of that reason. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 20-23)

In the opinion of the project leader of IBFT a customer who cannot do anything at his destination, might not be satisfied and accessible tourism could work the best if the whole region supports it. The tourism office in the destination has to know about barrier free facilities. Shops, sport activities and cultural sights have to be

adapted accordingly, so the consumer is able to enjoy a fully satisfying holiday experience. (cf. Laburda, 2010, p. 6) Also providers should be informed about the increasingly important role of Information Communication Technologies (ICTs) in tourism. As web accessibility is getting more and more important, the design and creation of an accessible web page is an issue nowadays as well. Clear navigation mechanisms, alternative auditory and visual content would enable the provider to reach the widest audience possible. Information is not only a criterion for disabled consumers; it influences the decision making of all tourists. (cf. Buhalis, Eichhorn, Michopoulou & Miller, 2005, p. 22-23) People who are visually impaired need to change font size and colour of the text, or to have text equivalents for pictures and videos they can read via a voice output system. Many people who can not hear have also difficulties to read, so comprehensive texts or videos in sign language could be a help. The Web Accessibility Initiative (WAI) issued special guidelines for web content, that give more explanations and information about the topic. (cf. Bundesministerium für Wirtschaft, Familie und Jugend & Wirtschaftskammer Österreich, 2009, p. 13)

A guest who uses a wheelchair arriving in a hotel, who is not able to look over the reception counter because of its height, might not get a good first impression. A lowered part of the reception and lowered stands for brochures could be a solution. In the rooms there has to be enough space between beds and walls for a wheelchair. Furniture and carpets should be chosen conscious, so that they do not restrict the guests in their movement. Mirrors and storage trays should be placed low enough for people who sit and children, the bathroom floor should not be very slippery. As help for the shower a simple plastic chair could have a great effect. In the restaurant and garden there should be enough space between the tables, chairs and sunshades to move or roll through. Paved ways in the garden make movement easier for mobility or visually impaired guests. Further, it is important to mark the first and the last step of stairs and ramps with a contrast colour, handrails should be installed. Parking lots for disabled people should be next to the entrance and be wide enough so that wheelchairs can be loaded. (cf. Bundesministerium für Wirtschaft, Familie und Jugend & Wirtschaftskammer Österreich, 2009, p. 11-12)

Furthermore, staff training is an important point to help to overcome fears and uncertainties. Problems arising from a lack of awareness for the needs of disabled guests and necessary communication skills could be avoided easily. The public authorities have a vital role in the application of accessibility measures as well. The more local tourism and service businesses are involved in the process, the

more benefit tourists and local citizens will gain of accessible tourism. (cf. Vos & Ambrose, 2008, p. 16, 34) Other simple measures like printing brochures in large, readable letters would make it easier for a big part of the population to gather information. Obviously a tourism supplier can not be expected to think about all of this, but architects, constructors, web designers and people who design brochures for tourism should be educated with regard to accessibility. (cf. Laburda, 2010, p. 4)

7 FUTURE OUTLOOK

7.1. Governmental issues

In the preparation phase of the new tourism strategy for Austria, the Ministry of Economy, Family and Youth invited more than 200 experts to participate on four workshops in October 2009. The topics discussed were the economic framework, infrastructure, marketing and finance/support. The participants came up with results and ideas that were used as base for the strategy plan to a big part. Concerning barrier free tourism the experts came up with various points. They demanded for the development of a nationwide guideline about the topic. Further the measures to raise awareness should be increased especially on the corporate level. According to the experts incentive systems like awards could also be helpful. They also suggested installing more possibilities for getting advice and financial support. The expert team came up with the vision that the first steps of the guideline are implemented in 2015 and the tourism service chain is barrier free on supply and demand side in the year 2030. (cf. Bundesministerium für Wirtschaft, Familie und Jugend, 2010, p. 26)

The results of the working groups were used to develop a tourism strategy. According to it, an important point Austria is going to improve is mobility. Further the importance to enhance usability through new communication and information tools, to facilitate the transport to and from a destination and to offer mobility at a destination are mentioned. Although the strategy paper explains the importance of accessibility and the establishment of a model region for accessibility, no detailed information is provided how, when or where this is going to happen. The paper does not name concrete measures or action plans. (cf. Bundesministerium für Wirtschaft, Familie und Jugend, 2010, p. 14-15)

Regarding the Convention of the Rights of Persons with Disabilities the Social Ministry is going to present a report about the progress of the implementation to the UNO in October 2010. The minister plans to use the data collected from this report to develop a national action plan for people with disabilities in cooperation with various interest groups and organisations. This national action plan will be based on the convention and the obligations connected with it, and provide the strategy guidelines for the next 10 years. Implementation of measures to reach accessibility in all areas of life will be one of the main points in the national action plan. Also the

European Commission is going to establish a union wide action plan in the next months. (cf. Schnurrer, 2010, p. 1-2)

According to Mrs. Aigner from the Bundessparte Tourismus und Freizeitwirtschaft of the WKO, accessible tourism is an ideal that is hard to reach and there is still a lot to do to grant accessibility for disabled travellers. But each segment of the touristic service chain should be adapted according to the needs of disabled people to allow them to spend carefree, relaxing holidays. (cf. Aigner, 2010, p. 1)

7.2. Estimations and expectations from suppliers

To find out what the supply side thinks about the current situation and future opportunities some accommodation suppliers have been asked. The suppliers of barrier free farm holidays have mostly positive experiences and opinions. The owner of 'Guesthouse Advinum' thinks that we are only at the beginning now, and that there is a lot of potential for development, especially in regards to leisure activities. Others have the opinion that the number of overnight stays in this sector will increase further because also people living in care facilities and centres will be able to make use of barrier free holiday facilities. (cf. Kaltenhauser, 2010, p. 1; Knausz & Knausz, 2010, p. 1; cf. Schlögl, 2010, p. 1.)

The owner of Landhaus Bender replied that she sees the development very positive because some time ago disabled people could not choose. They could only go in some hotels but no pensions or apartments. She further mentioned an important point, that there are not only physical disabled guests. And many tourists seem to have problems or feel restricted in their recreation, when they are confronted with mentally impaired people in their holidays. (cf. Bender, 2010, p. 1)

8 CONCLUSION

Considering all statistics and definitions it can be said that everyone might experience disability on one point of his life. First, there are people born with disabilities, some who can participate active in our society if their surrounding is adequate, some with a multitude of impairments that will never allow them to do so. Then there is our society which produces more and more elderly but still active people, people suffering from impairments after accidents or simply because they can not read or do not understand the language spoken in our country. Of course also increase in the self awareness and activeness of the disabled population leads to a change in their travel behaviour. Disabled people might experience disadvantages in education and in their living situation, but a high percentage of them can afford and has the need to travel and to enjoy recreation.

The definition and description of accessibility show that it is not only a topic concerning the disabled population, but everyone. Decision makers and population should be aware of that fact. The current supply situation is not as bad as it definitely was years ago. There are accessible accommodations available in every category, from campsites over farm holidays to apartments and hotels. Especially the Internet enables interested people to find and appropriate holiday destination and information about leisure activities. Sports activities for disabled guests are available, not everywhere, but at least in some regions. Mostly offers for bikers and skiers can be found.

Still there is a lack of awareness for the problems and needs of disabled travellers, but not at least because of the given regulations in law the tourism suppliers will have to rethink and reconstruct their offers. It might not make economic sense to strictly follow the legislation and close the eyes on the market opportunities that might arise. A supplier offering one accessible room looking like a room in a rehabilitation centre might even distract guests. Universal Design allows also modern and good looking alternatives, and spacious rooms might not only be used for guests in wheelchairs but also for families with children. Ramps at the entrance allow wheelchair users to enter and leave their accommodation without asking for help. But also guests carrying heavy luggage might be thankful for not having to carry it upstairs to reach the lobby or their room. Brochures and websites in a clear and simple language, designed for good visibility and in different languages, allow visually impaired, elderly and foreign people to find the necessary information.

Disabled guests will appreciate if they not need to ask for all details about the accessibility of the hotel because they are provided in the fact sheet. Open minded staff, aware of the most important needs of their disabled customers and how to deal with them, might also be more caring in the contact with the other guests.

The target market 'disabled people' does not only include the disabled people, but also their friends and family. This leads to the conclusion that if suppliers and destinations work together to offer a tourism service chain with no weak segments concerning accessibility, there will also be a financial surplus for them.

One of the main success factors identified were strong decision makers who are aware of the problems. These can influence the networking and progress within their region positively and are also likely to care about the future development. Decision makers on political level are also very important, because the government has of course a main role. Supporting the development of Tourism for all by implementation of corresponding regulations for building and staff training is an important issue. Through awards for innovative projects, a nationwide marketing strategy and financial support of interested suppliers the progress could be enhanced.

In Austria the first steps are taken by means of the implementation of expert workshops in regular intervals and the new tourism strategy, but there is definitely a need to go further into detail and action, not only in regards to the BGStG. This law came into force in 2006 and the ten years period accommodation suppliers have to adapt their facilities according to it should not be forgotten. On the contrary, it is recommended by experts that suppliers already plan and budget the changes in time.

Additionally, nationwide standards and certification of accessibility might increase the success of accessible tourism offers. Because of nine different building laws in nine provinces, it is not possible to compare accommodations directly. Most experts asked about their future expectations were aware of the fact that there is still a lot to do. In their opinion the situation has already improved within the last years, and most of them do also believe that the market will grow in the future.

For further research it might be interesting to conduct interviews with political decision makers about the future development. It would also be interesting to see how suppliers react on the new legal situation, if they already started to think and plan in direction accessibility or if they wait and see. Because of the limitations of this

paper it was not possible to include interviews with disabled people about their travel experiences, needs and future expectations which would of course be interesting to see the situation from the view of all stakeholders. New perspectives and insights could be gained by comparing the Austrian attempt to accessibility in tourism with other countries. For example, a comparison from Austria with countries which have a similar tourism situation, like Switzerland or Germany, would allow benchmarking and maybe help to develop action plans and marketing solutions.

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