



PROMOTION AND MARKETING OF ACCESSIBLE TOURISM PRODUCTS

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DESCRIPTION OF THE ACCESSIBLE TOURISM MARKET

Every marketing strategy requires research. According to Kotler, we conduct research to learn about the needs of markets and consumers as they develop and to measure the effectiveness of marketing tools without waiting for the information to come by itself (Kotler 2001).

Research serves to identify the existing relationships between the variables that are present and operating in the market.

Market knowledge allows the rational identification and representation of the influence exerted on the making of products and services by the various actors in the environment.

In order to have a detailed picture of the tourism market and, in our case, the accessible tourism market, we need to analyze the influencing elements, distinguishing between those factors of an exogenous nature (social, political, economic, etc.) and those of an endogenous nature (competition and the bargaining strength of the customers and suppliers of the service).

Through this analysis we can position and evaluate accessible tourism from a systemic point of view, seeking to identify and focus on the external opportunities and threats (in relation to the accessible tourism market) and the strengths and weaknesses of the accessible tourism product.

Critical elements external and internal to the product

External environment

	OPPORTUNITIES	THREATS
ECONOMIC AND DEMOGRAPHIC CONTEXT	<p>There are about 50,000,000 persons with disabilities in Europe, of which 36,000,000 who are inclined to travel and 6,000,000 who are already going on vacations.</p> <p>Italy has about 3,500,000 persons with disabilities and elderly</p> <p>This market segment is growing (due to aging of the population and persons with disabilities beginning to work and, thus, earn)</p> <p>Persons with disabilities often travel with companions</p>	<p>High market prices</p> <p>Lack of sources for the effective number of persons with disabilities</p> <p>Few points of agreement between the private and public tourism systems</p>
SOCIAL AND LEGISLATIVE CONTEXT	<p>Laws favouring the removal of architectural barriers</p> <p>Governmental incentives</p>	<p>Cultural barriers</p> <p>Environment poorly accessible and information not always precise</p> <p>Lack of consistent symbols in the European Union</p>

Internal environment

	STRENGTHS	WEAKNESSES
PRODUCT	<p>Increase in the number of customers and profitability</p> <p>An accessible product can be comfortable for all travellers</p> <p>Deseasonalization</p>	<p>Difficulty of preparing an accessible tourism product in all its components</p> <p>Accessible architectural solutions not aesthetically integrated</p> <p>High maintenance costs for some installed mechanical equipment and mobility aids</p> <p>Continuous monitoring of the solutions adopted for the use of open/green areas</p> <p>Misinformation among tourism sector operators</p>
PROMOTION	<p>Positive image return</p> <p>Building loyalty and word of mouth</p>	<p>Propensity to provide information that is not always correct and reliable</p>
PERSONNEL	<p>Growing interest in the development of ad hoc training courses</p>	<p>Lack of trained reception personnel</p>

SYSTEM OPPORTUNITIES AND THREATS

Opportunities

Economic and demographic context

- Although it is difficult to find information about the numbers of persons with specific needs, there are two fundamental measurements that are considered to be among the most reliable even though not very recent.

First, there is the research conducted in Europe by Touche Ross, dating from 1993, which estimated the European disabled population to be about 50 million, or 14% of the population. Of these 50 million, 36 million were individuals who said they were inclined to travel while only 6 million declared they actually did so.

As for Italy, in 1999 Iter conducted research focusing on the demand for accessible tourism. This research revealed that about 3.5 million persons define the phenomenon of "tourism for all" in Italy.

- This figure includes the elderly who, even though not strictly considered disabled, often have similar needs and constitute the most important slice of the segment of persons with specific needs. Moreover, it is a growing category because the population is continuously aging.
- Persons with specific needs also include those with temporary disabilities such as pregnant women.
- Persons with disabilities are beginning to have good job opportunities and can travel because they have an income.
- Persons with disabilities almost always travel with a companion, which means a party of at least two for every customer.

Legislative context

- The legislature has passed laws favouring the removal of architectural barriers in public and private buildings (DM 236 of 14 June 1989 and DPR 503 of 24 July 1996). In addition, the Ministry of Public Works has established a special fund for the removal of architectural barriers in private buildings (Law 13 of 9 January 1989). The most recent is Law 350 of 24 December 2003, which in article 3, paragraph 116 provides financing of up to Euro 20 million for 2004.

Threats

Economic and demographic context

- The costs for ordinary customers and customers with special needs differ significantly. The need for accessible structures, the need to have a companion, the poor selection of tourism packages intended for this target market significantly increase the cost of travelling and taking a vacation. For example, hotels are often accessible from an architectural point of view, but less so from a price point of view. The large hotel groups are sensitive to the needs of tourists with disabilities but they are also especially attentive to “exploiting” a market segment whose economic potential is still largely unexpressed. The consequence is the wide availability of rooms and facilities adapted for the target market but concentrated in medium- to high-category structures (Novotel, Ibis, Mercure, Sofitel, Sheraton, Holiday Inn, etc.). The marketing strategies of these large chains are characterized by great attention to the subject of accessibility from the point of view of integration. In contrast, the majority of intermediate level structures, such as guest houses, family hotels and tourism rentals between private parties lack sufficient accessibility to meet the needs of the target market despite the fact that they are a substantial and important part of the Italian tourism offering and cover the entire country.

So, it is obvious that when persons with disabilities go on vacation, they must deal both with the costs arising from their personal needs (companion, specialized assistance, etc.) and the offering of structures in too high a category, with the result that the potential demand for accessible tourism remains unsatisfied.

- The difficult development of this sector can mostly be attributed to the lack of quantitative and qualitative information about the disabled population in Italy. The most recent studies date to the aforementioned “STUDY OF THE DEMAND FOR ACCESSIBLE TOURISM” produced by ITER

in 1999 on a commission from ENEA in the context of the "STARe" project (Tourism services for accessibility and a comfortable stay).

While the number of persons with disabilities living in the various countries can be found through the respective national ministries of health, more difficult to find is the number that would like to travel, i.e., the number of persons with disabilities that make up the possible demand for accessible tourism.

- Increasing the offering of accessible tourism means finding the points of agreement between the private and public sectors. When an operator puts together a tour package, it has to take into account all the elements that could be offered as accessories to the vacation (excursions, sports, visits to monuments, museums, etc.) and that can only be fully practicable in the presence of a series of integrated and accessible services in the area, many of which are the responsibility of the public sector (public transportation, cultural and environmental heritage, etc.).

Social and legislative context

- Those who work in the field of tourism play a determining role for its growth and development. Very often, however, the attitude of tourism operators towards customers with disabilities is influenced by cultural barriers – the most difficult to remove - that negatively affect their work to the detriment of professionalism.

Moreover, the tourism sector tends to underestimate the potential economic value of persons with disabilities, while the conviction that opening up to this segment of demand involves heavy costs is still widespread.

- Up until now, accessibility has been only been considered as the mere removal of architectural barriers; instead, other levels of accessibility should be taken into consideration, such as the accessibility of information, for example.
- As of today, the European Union has still not adopted universal symbols to represent common accessibility for the various types of disabilities. As a result, tour packages are often unreliable regarding the effective conditions of accessibility at the destination.

STRENGTHS AND WEAKNESSES OF THE ACCESSIBLE TOURISM PRODUCT

Strengths

Product

- Opening the doors of the market to different categories of customers – without creating "ghettos" – means that services can be used by an expanded pool of users. This not only leads to higher levels of use and the satisfaction of the demand for both tourism in general and "accessible" tourism, but also greater profitability for the various players in the tourism system (tour operators, travel agencies, carriers, hospitality and foodservice facilities, etc.). The increase in demand allows for greater cohesion between the public and private spheres, influencing the profitability and development of the global economy of tourist destinations as a result.
- The preparation of an accessible product or service often involves raising standards of quality and, thus, greater appreciation by the overall market and not just the specific segment linked to disability. Just think of the electronic displays and warning tones on buses or the subway that indicate stops: these are used by everyone and not just the hearing- or sight-impaired. For this reason, creating an accessible and integrated product often means creating a comfortable product or service that is easily used by anyone in an immediate, comfortable way, thus adding value to the product.
- Tourism products are non-storable and, so, deseasonalizing is fundamental. Accessible tourism also includes the elderly market segment, which prefers to take its vacations in the low season because they have more free time and take advantage of the lower rates. Working with this market segment necessarily means being able to deseasonalize.

Promotion

- Today, customers in the selection phase are increasingly more attentive to the criteria that guide businesses. Businesses have understood the market's new attitude and are increasingly moving in the direction of management that is attentive and respectful of social needs, the environment and sustainability. It's enough to look at the proliferation of social balance sheets and reports from both public and private businesses. For this reason, ethical business management represents a greater return for businesses than just a positive image. We are thinking

of the increasing attention being paid to social tourism, sustainable tourism and even tourism for all and the proliferation of marks that attest to the attention being paid to these problems. For example, the social report from the Intercontinental Hotels Group reports the investment made to remove architectural barriers in the group's English hotels and for personnel training, all in order to earn the recognized "Tourism for All" mark.

- In the accessible tourism sector, customer satisfaction is fundamental. This element is transformed into a powerful promotional vehicle: satisfied customers will almost surely become loyal customers since, due to the difficulties generally encountered in finding a suitable offering, they normally prefer to return to those resorts and facilities where they were treated well.

In addition, the general trend to disregard minor market segments when developing promotions has led the latter to resort to word of mouth.

Personnel

- Greater attention to the segment of persons with disabilities and the difficulties encountered in responding to the needs of these customers without adequate tools and knowledge has led operators to perceive the need for greater personnel training. This is the origin of the current growing interest in ad hoc training courses.

Weaknesses

Product

- The preparation of an accessible tourism product presents difficulties since it consists of a variety of integrated services. For this reason, an accessible tourism product must result from the integration of services that all meet the requirements of accessibility.
- Architectural solutions are often adopted that do not harmonize with the environment from an aesthetic point of view. It is important to emphasize that such products must be prepared following the logic of possible use by all, thus creating solutions that integrate their use for persons with various disabilities and, consequently, improve their use by all possible users. For example, there is no reason why an accessible room cannot be used by anyone, as long as the architectural solutions chosen do not make it look like a hospital room and, therefore, not very welcoming regardless of how comfortable it is.
- The adoption of some mechanical equipment (such as stair-elevators) and mobility aids require continuous monitoring and costly maintenance. When their correct operation is not periodically checked, they are often unusable at the moment of need.
- Because the solutions adopted to allow the use of open spaces/green areas are subject to deterioration due to the weather and related phenomenon (washing away, uncontrolled vegetation), they require continuous monitoring to check their conditions of use and to schedule periodic maintenance.
- Tourist sector operators are, normally, poorly informed about which could be the best architectural solutions for accessibility from the point of view of both quality and expense. So, the upgrading of structures is entrusted to architects with little experience and the best-known suppliers: most of the time the results are far-fetched solutions even for a person with disabilities and pointless high costs for the businessman.

Promotion

- There is a tendency to provide information that is not always correct and reliable. For example, many catalogues do not meet the requirements and provide incomplete, unclear, unverifiable or unreliable information on accommodation facilities, the environment, and services: the term "accessible" is often used without specifying the underlying criteria.

Personnel

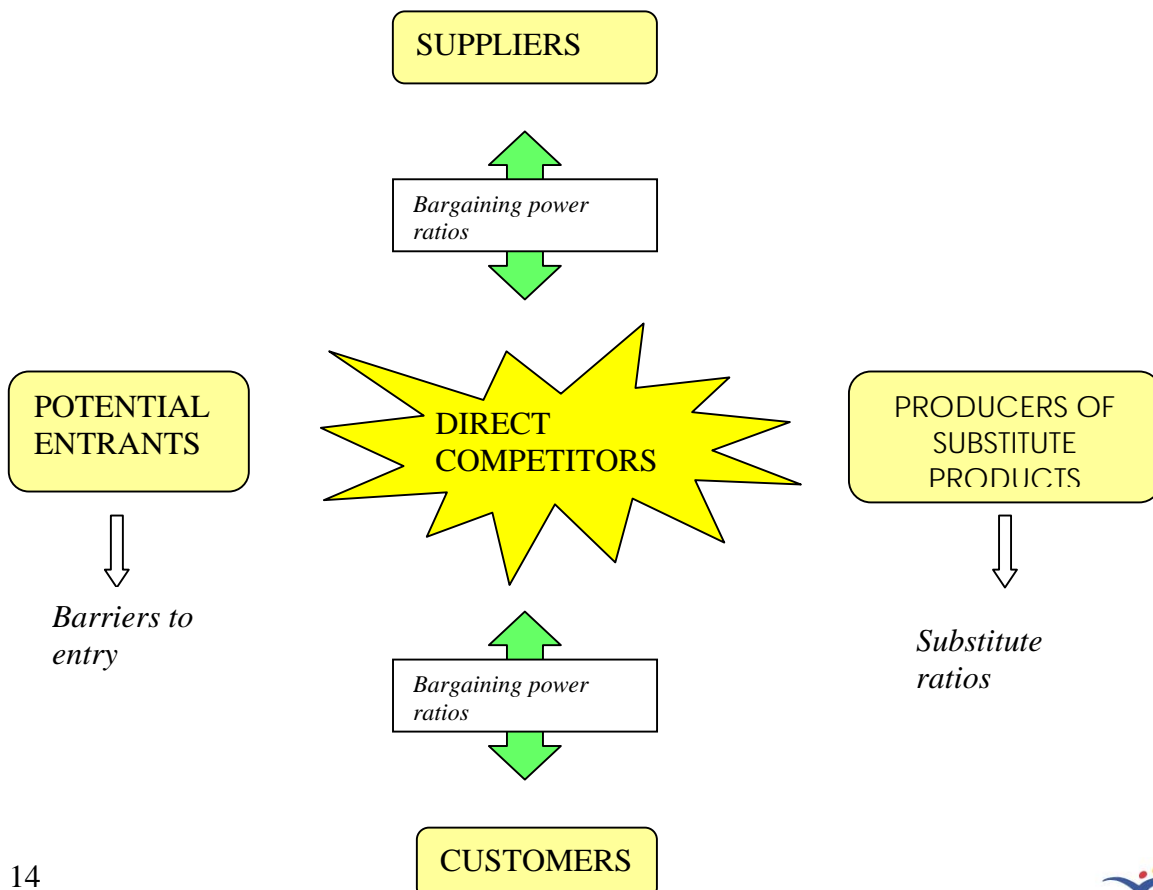
- There are still only a few training courses and, for this reason, personnel are not adequately prepared to welcome this type of customer. In the majority of cases, this leads to the creation of packages where the term "accessible" is used improperly and superficially, precisely due to ignorance of the subject.

COMPETITIVE ARENA

Porter proposes a model for analyzing the attractiveness of an industrial sector called the Competitive Arena, in which the sector's profitability is determined by the interaction of five competitive forces that make up its structure:

- the threat of new competitors
- the threat of substitute products/services
- the customers' bargaining power
- the suppliers' bargaining power
- the rivalry between current competitors

The structure of the sector determines how much value is produced in it and, most of all, who appropriates it and in what measure. This model allows observing that the competition a business is subject to does not exclusively consist of its traditional rivals but of all subjects that, to a greater or lesser degree, can appropriate the sector's value, taking it away from the business. This concept of competition is defined as expanded competition.



The competitive arena of accessible tourism

DIRECT COMPETITORS: the direct competition consists of everyone who produces a product similar to ours. Since this market is not yet sufficiently exploited, there isn't much direct competition;

SUPPLIERS: since there are few suppliers, they have high bargaining power and this leads to higher costs;

POTENTIAL ENTRANTS: there is still a limited offering in the face of large demand and, for this reason, sector operators are working in an oligopoly market. This implies that customers have low bargaining power.

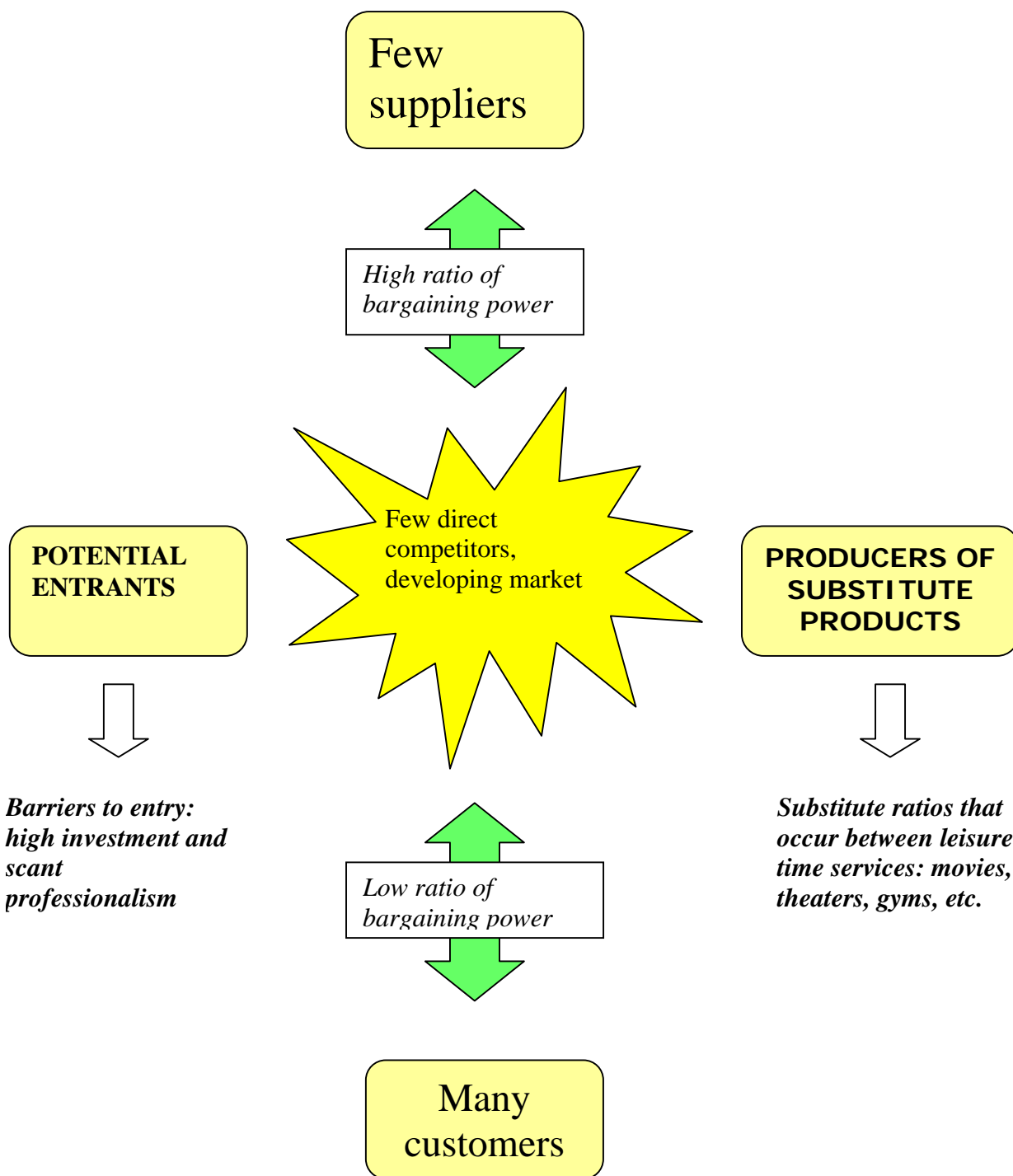
The barriers are all the factors that make it difficult to enter the market. They can be of two types: natural and artificial.

For this market, the natural barriers to entry are the high investment needed to adapt the offering when these are made after design or remodelling (when accessibility is included in the original design, the costs are irrelevant, falling within normal construction costs) and poor professionalism due to the lack of specialized training courses.

In this case, there are no artificial barriers (artificial barriers are normally imposed by the government to pursue a protectionist policy, such as specific customs duties).

SUBSTITUTE PRODUCTS: Porter's competitive arena model was created for the industrial sector: the typical example normally given is the substitute ratio between butter and margarine (when the price of butter is excessively high, consumers will replace it by buying margarine).

The application of this structure to the services sector is difficult at times, especially when talking about substitute ratios for a tourism product. However, one can create substitutions between products that, like tourism, are used during leisure time (movies, theatre, gyms, etc.), even if this could seem somewhat forced.



MARKETING TOOLS

"Those who are fond of practice without knowledge are like the pilot who goes into a ship without rudder or compass and never has any certainty where he is going. Practice must always be founded on good theory."

Leonardo da Vinci

Promotional and marketing campaigns require in-depth knowledge of who they are intended for, so as to plan an adequate strategy and avoid waste. In fact, having a marketing orientation means identifying and, at times, anticipating the customers' needs in order to offer a fully satisfying product. This concept is the foundation of economics: supply meets demand when the consumer attributes a value to the good precisely because it satisfies a need.

In fact, according to Kotler, marketing is "meeting needs profitably".

Therefore, you have to know the customer you're addressing in order to know the needs: who is buying, what they are buying and how, but above of all, WHY they are buying that specific product (what are their motivations and, thus, their latent needs).

This allows marketing the product in the right place, at the right time and, most of all, with the right means.

Not skilfully determining the objectives means the risk of wasting resources and energy.

Many for-profit companies understand this and are accustomed to using marketing as a tool for success and to beat increasingly fierce competition.

In practice, however, some non-profits often start from the assumption that adopting a marketing orientation should be considered an anathema for their specific purpose.

Nothing could be more wrong. Being a non-profit certainly doesn't mean producing products without quality but, on the contrary, doing it even better and it is precisely for this reason that they should apply marketing techniques.

1. ANALYSIS OF THE DEMAND FOR ACCESSIBLE TOURISM

1. RESEARCH AND DATA GATHERING

In general, marketing research can be:

- Original qualitative and quantitative
- Secondary

Companies conduct original research to gain specific knowledge; secondary research, on the other hand, is conducted by reworking data obtained for other purposes. Before conducting original research, which is often costly, one normally decides to conduct secondary research, making use of original research already done for other purposes.

Quantitative research returns data expressed as quantities, while qualitative research produces data that tends to explain the customers' buying motivations: both produce a mass of data about distributors, buying behaviours, customer attitudes and intentions and, in general, the current and potential market.

SOURCES ON TOURISM FOR ALL

IN EUROPE

- **QUANTITATIVE RESEARCH:** The first organic research studying the phenomenon of tourism for persons with disabilities and projections of foreseeable economic development, at a European level, if certain conditions were provided, was presented in London during the course of the "Tourism 2000 Tourism for All in Europe" convention in October 1993. Produced by **Touche Ross**, the study "Profiting from Opportunities – A New Market for Tourism" claimed that the officially-declared disabled population was about 11% of the total population. To this data we must add the 3-4% of the public that falls through the official detection net for one reason or another. So, 14% of the population translates to about 50 million persons with disabilities in Western Europe.

For a series of different reasons (such as, the type of disability or social-economic situation) one cannot consider the entire population with disabilities as potential customers for tourism.

Touche Ross estimated that 72% of the disabled population had the possibility and propensity to travel, i.e., 36 million persons, and that 5-6 million persons with disabilities were actually travelling in 1993 (the date

of the research). So, we arrive at 30 million persons with disabilities who are interested in travelling but that, for a variety of reasons, are still excluded from official tourism circuits. Then, the data assumes even greater importance when one considers that persons with disabilities rarely travel alone, for either pleasure or need, without at least one companion (relative, friend, operator, volunteer, etc.).

□ **QUALITATIVE RESEARCH:** The Eu.for.me project includes a panel of young people from the European partner countries and representing a wide range of disabilities. In January 2005, focus groups of young persons with disabilities were conducted in each partner country with the objective of uncovering their specific needs and expectations. We then drafted the document, "Analysis of the needs in the field of tourism for All".¹

¹ The detailed results can be found on the site www.euforme.net in the documents section

Results of focus groups conducted with persons with specific needs in the context of the EUFORME project					
	LUXEMBOURG	ITALY CST	ITALY TANDEM	SWEDEN	GERMANY
TYPE OF DISABILITY	Motor, mental	Sensory, motor, food, mental	Motor allergies		Motor, Allergies, Sensory, Diabetic Height
WITH WHOM	In a group (associations, school, family)		Friends, family, associations tour operators	Alone, with family, in a group	Friends, family
HOW MUCH	Quite a bit, often	Once a year		Every two months	Once a year
WHY	vacation	Vacation, sports, culture		Treatments Doctors Pleasure	Vacation, work, study
HOW LONG & WHEN	1-2 weeks	Low season			Low season
HOW	Air, bus, car	Train, bus, air			Air, bus, train, car
WHERE	Southern Europe seaside, cities, mountains	In Europe, Italian cities, America & Mexico every 2 years		Seaside resorts, Europe, cities	Europe, weekends in German cities Australia & USA
AIDS	Anti-bedsore cushions, seaside wheelchairs, comfortable chairs	DTS, scale models, descriptions in Braille, food components and preparation Sign language	On-site assistance	Wheelchairs, Blood sugar tests, insulin sets, allergy medicines	On-site assistance, display, guide dogs, audio descriptions
ORGANIZATION	Organizations Internet, word of mouth	Done personally, via Internet, word of mouth, Trusted tour operator	Internet	Organizations Specialized ads Internet	Internet

IN ITALY

In 1999, ITER conducted research in Italy on behalf of ENEA – the Italian national agency for new technologies, energy and the environment – in the context of the STARe project (Tourism Services for Accessibility and a Comfortable Stay). The aim of the study was to gather quantitative (number of persons with special needs and the percentage of them that contributes to demand for tourism) and qualitative data, identifying the needs expressed by tourists with special needs to fill the holes in the statistical research that, while reporting accurate data, does not correlate the numerical data to the users' specific needs.²

According to this research, the demand for accessible tourism can be broken down into three macro-groups:

1. Explicit demand for accessible tourism
2. Demand from the elderly
3. Potential demand for accessible tourism

Explicit demand for accessible tourism

This segment includes the population that explicitly says it has special needs to satisfy when travelling. This refers to needs and difficulties encountered, overcome, or not yet experienced as impediments in daily life but that create “disabilities” while travelling.

The socio-economic characteristics of travellers with special needs that emerge from the analysis are as follows: women 54%, men 46%, primarily belonging to the middle class (office employees, teachers, small business owners, etc.) and they prefer to travel in Italy (82%) especially in Trentino, Liguria and Lombardy.

There is still only a small number that choose Southern Italy as their travel destination (never more than 30%), due to the better visibility of Northern facilities in terms of adequate services and structures favouring accessibility. In any case, the tourists who visited Southern Italy on various occasions expressed a favourable opinion, on the whole: over 78% said that they found no problems with accessibility.

In addition, this segment of demand travels primarily during the low season, such as in the fall or spring.

They go:

- for fun and recreation in 30% of cases;
- for treatment, well-being and hot spring spas in 16% of the cases;
- for work or study vacations in 10.3% of the cases.

² Detailed results can be found on the site www.disabilitaincifre.it

The means of transportation used are:

- 55% cars;
- 14% trains;
- 18.7% air.

In relation to the general tourist profile, persons with disabilities are less likely to travel by air and more likely to travel by train.

Trips are organized independently 79% of the time (much more than other types of tourists), with the remainder resorting to travel agencies, tour operators and support associations and agencies.

With reference to the types of lodging used, the preferences of this segment do not vary from those of the general population, even if a larger percentage stay:

- in their own homes or with relatives or friends (31%);
- in more economical extra-hotel structures (6.3%);
- in apartment hotels, vacation homes or religious institutions (3.7%).

As regards the stated needs and the difficulties encountered by this type of traveller when they become tourists, in order of importance, they have to do with: special diets (42.7%), non-allergenic or hypoallergenic environments (3.4%), the need for doctors' visits and medical treatment (29.1%), motor difficulties (8.3%), sensory disturbances and, finally, problems of orientation and communication.

However, it should be emphasized that the emergence of a need does not always mean encountering an obstacle: in fact, in some cases, the tourists organize the trip themselves, finding the most suitable facilities and services for their specific needs.

Demand from the elderly

The profile of elderly tourists is characterized by the following socio-economic aspects:

- equal distribution between men and women (50% of each), with a marked presence of housewives.

With regard to overall demand for tourism in terms of destinations, the elderly are more reluctant than persons with disabilities to go abroad and prefer to stay in Italy and, in particular, to go to:

- Tuscany (10.6%);
- Lazio (9.3%);
- Sicily (9.6%).

Tourists "over 64" travel less than persons with specific needs but for longer periods, from 15 to 20 days, and prefer the months of:

- April (11.5%);
- May (22.2%);
- June (15%);

- July (13%)

avoiding the August period as much as possible.

For the most part, thanks to greater free time, the elderly travel for:

- recreation
- entertainment
- to see relatives and friends
- religious reasons.

The preferred means of transportation are trains (28%), followed by motor coaches and buses (23%), while cars are the least used means.

As for organizing trips, elderly tourists make the most use of outside organizers such as tour operators and travel agencies, associations and religious institutions.

With reference to the type of lodgings, in the great majority of cases elderly travellers take advantage of the hospitality of friends and relatives (40%) and only 30% stay in hotels or economical guest houses.

Moreover, we can also say that, although the elderly have more free time, they are limited in terms of cost and are less independent in organizing their tourist travel.

Potential demand for accessible tourism

This last segment includes that part of the Italian population that has not travelled at least once a year for tourism due to health problems but that would be interested in travelling if some particular needs were satisfied. There are about 500,000 potential travellers involved.

The average profile of Italians falling into this category has well-defined characteristics:

- more women than men
- 72% are elderly
- there is a predominance of housewives (29%) and employed workers (28%)

The elements studied relative to the availability of potential demand to be transformed into effective accessible demand have to do with the conditions that the interviewees consider necessary to make tourist activity possible:

- 62% would be interested in travelling if a companion were available
- 25% require the availability of medical assistance
- 6.5% require the removal of architectural barriers in facilities and services.

If they were reachable, the destinations of choice would be:

- seaside resorts 34%
- mountain or hill resorts 28%

In the majority of cases, the most desirable destination is Italy (47%) and, in particular, the North, Trentino Alto Adige followed by Emilia Romagna, the Centre, Tuscany, and the South, Campania, Calabria and Sicily.

IN GERMANY

In November 2002, the German Ministry of the Economy and Labour commissioned a study by the University of Munich, conducted in collaboration with Neumannconsult and Reppel+Lorenz, on the economic demand for accessible tourism.³

IN SPAIN

One recent study of the "Habitus y actitudes hacia el turismo de la personas con discapacidad Fisicos" was conducted by PREDIF (Plataforma Representativa Estatal de Discapacitados Fisicos) in 2004.⁴

OTHER DATA

To find other data that could be useful for the purposes of your own research, consult the sites:

www.istat.it

www.disabili.com

www.disabilitaincifre.it

www.handicappincifre.it

www.pubbliaccesso.gov

www.italiapertutti.it

³ the results of the study can be found on the site www.euforme.net under needs analysis

⁴ The complete study can be downloaded from the EU.FOR.ME web site in Spanish.

2. SEGMENTATION

Segmentation means the transition from a passive marketing policy to an active, targeted and deliberate marketing strategy. In fact, segmentation allows going from an undetermined, ungovernable market to a specific market that is more easily studied and managed. This means reducing waste, increasing sales, producing profits through customer satisfaction and doing this means getting to know the customers.

One mistake often made in accessible tourism is to confuse segmentation with a mere description of the market. In fact, segmentation doesn't mean simply knowing the disabilities and using them, and the related difficulties, to divide up the market.

In this case, segmentation means a thorough study of the reasons for travelling through quantitative and qualitative analysis to determine specific target markets (shares of the accessible tourism market), where each has its own profile.

Since we are aware that, even today, for persons with disabilities travelling means innumerable difficulties caused by a wide variety of obstacles, we are proposing a segmentation based on broader criteria.

The hoped-for objective would be to no longer have to consider the demand for accessible tourism inasmuch as it would fall under that of tourism pure and simple. Having a disability shouldn't mean being a special tourist but simply a tourist.

1. MACRO-SEGMENTATION OF THE DEMAND FOR TOURISM FOR ALL

The first step is to divide the market into macro-segments: this allows identifying the market of reference based on the needs of the purchasers (and not the offerors). To explain where we want to operate, we have to know: What to do? For whom? How?

The market of reference will be at the intersection of classes of needs, classes of customers and technology.

For example, in the specific case of accessible tourism, we can distinguish:

I. CLASSES OF NEEDS:

1. relaxation
2. active vacations
3. cultural vacations
4. business/work
5. attendance at conferences/conventions

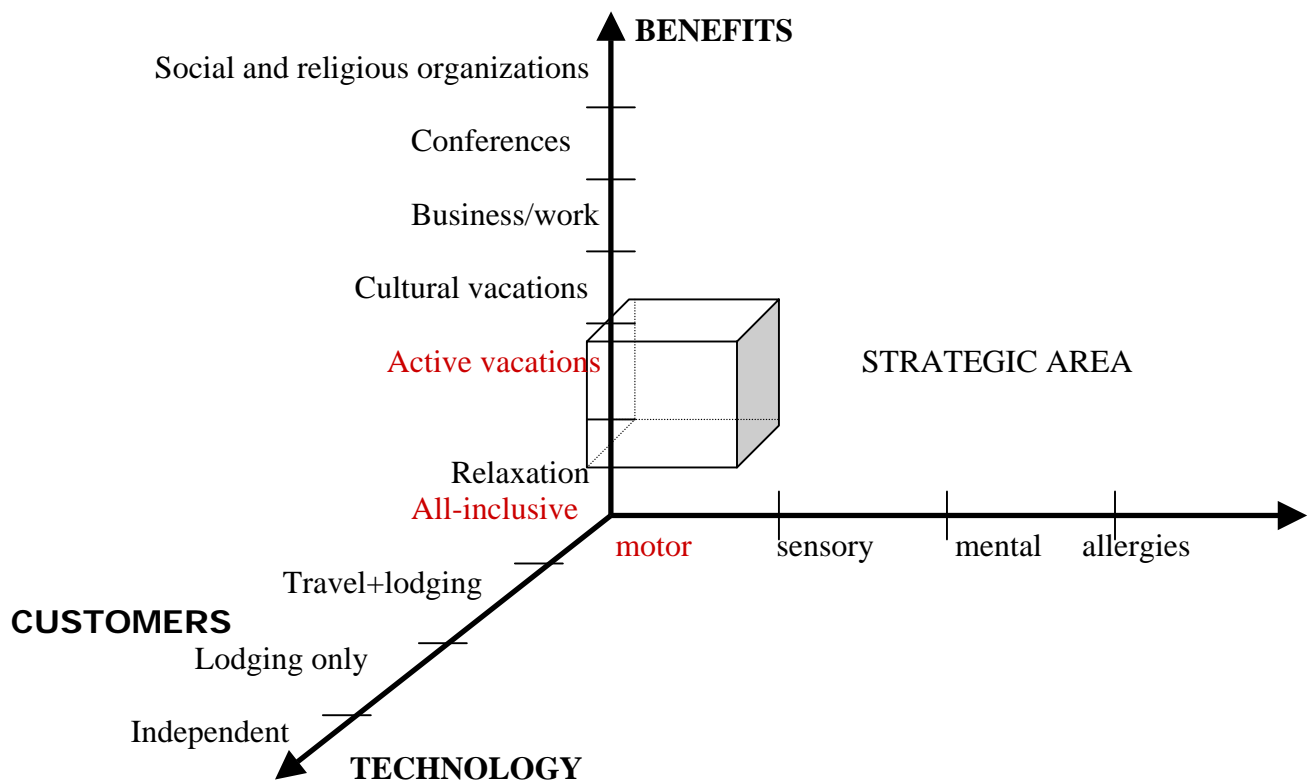
6. social, religious and business gatherings, etc.

II. CLASSES OF CUSTOMERS: in our case, these can be defined based on the type of disability:

1. motor disabilities
2. sensory disabilities
3. intolerance and allergies
4. mental disabilities

III. TECHNOLOGY: methods of dispensing and combining the service:

1. all-inclusive
2. travel plus lodging
3. lodging only
4. completely independent



In the example, we focused attention on one segment: tourists with motor disabilities who want to take a vacation that is both active (entertainment, nature and sports, etc.) and all-inclusive.

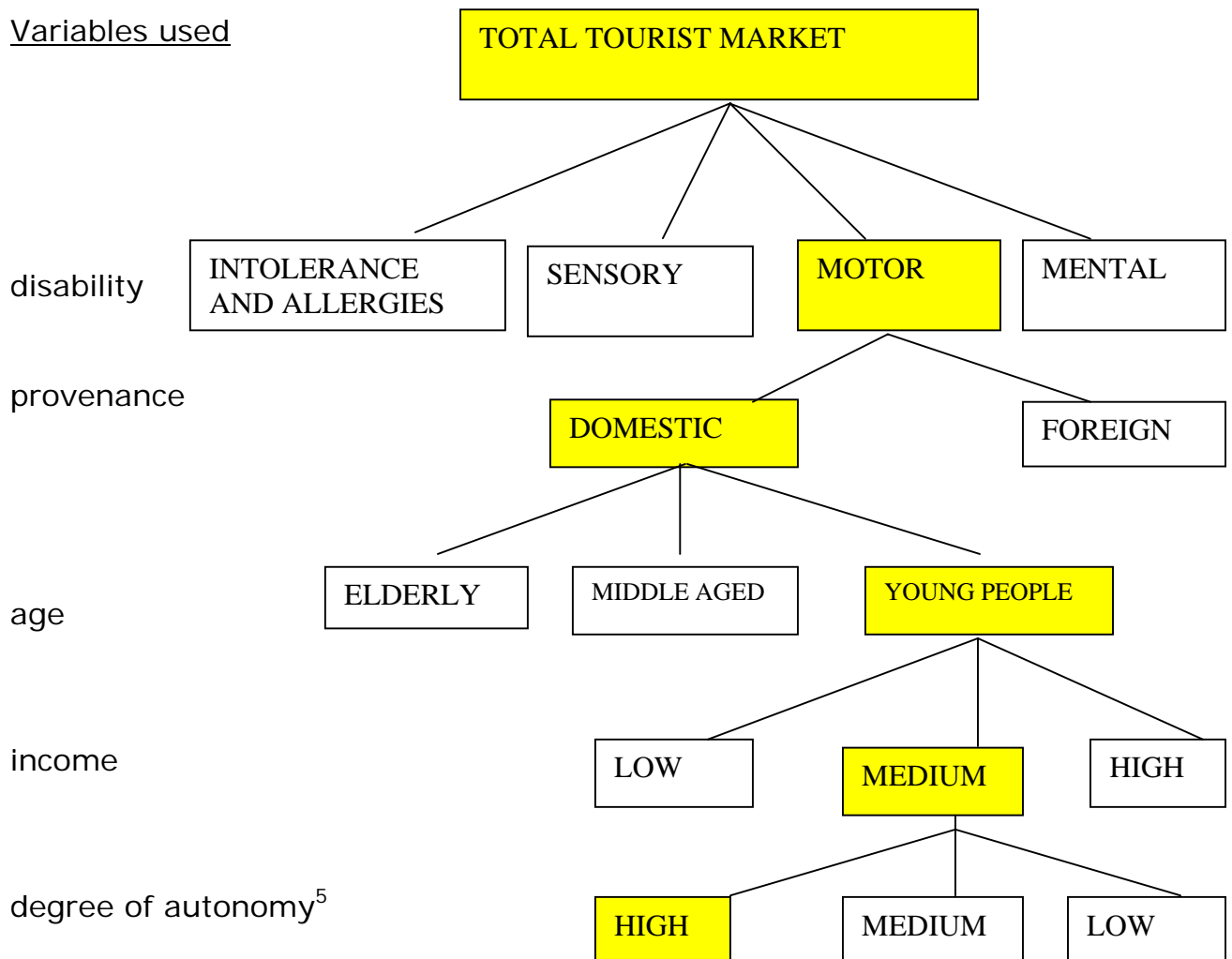
In any case, it is possible to use more than one technology (the area of business extends in depth) and/or select more customer classes (the area of business extends in breadth) and/or to satisfy more classes of needs (the area of business extends in height). However, it is important to remember that it would be better to identify an area that is not too broad, otherwise, it could be dispersive and, thus, not very coherent with achieving the set objectives (limiting the waste of resources and energy and pursuing customer satisfaction).

2. MICRO-SEGMENTATION

Having delimited the strategic business area, it is a good idea to do an in-depth study of the macro-segment identified, trying to understand WHO really makes the purchase decision, WHAT the market buys (and WHEN, WHERE and HOW it buys) and, having discovered which are the latent (unidentified) needs, crossing the Who/What with WHY it buys. So, taking up the previous example, the analysis could be conducted as follows:

I. WHO: we subdivide the macro-segment first identified into micro-segments using a variety of variables:

Variables used



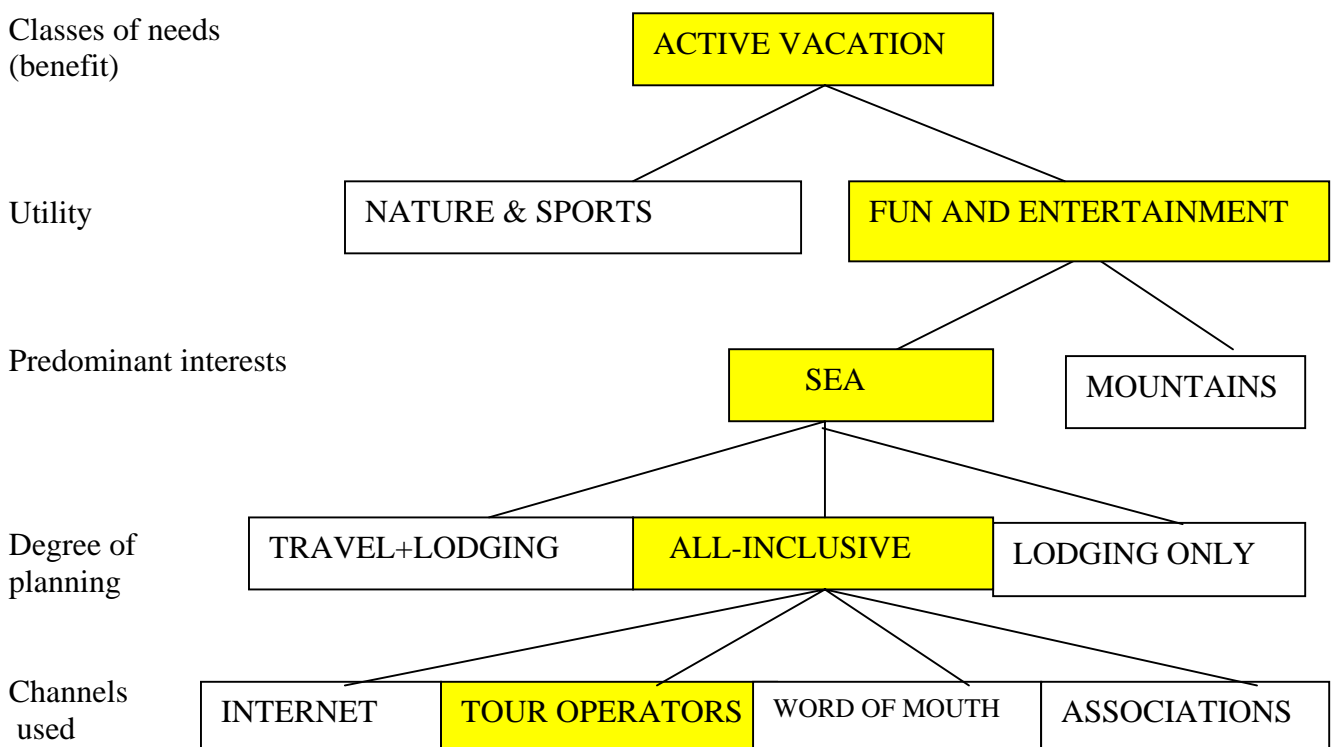
⁵ Degree of autonomy means the physical ability to move and perform activities without help.

The more variables used, the more detailed and precise the description: socio-economic characteristics (age, marital status, professional, social class, etc.), geographic characteristics (continent, country and city) and psychographic characteristics (lifestyle, attitudes). In our case, it is possible to add characteristics having to do with disability (for example, if we chose allergies, we could study the degree of intolerance and select the specific allergies).

II. WHAT: now, we expand our knowledge of what the specific market wants; the benefit of the product and its utility for the consumer and, finally, its characteristics.

Then, we go into the details of when and how much this product is purchased, in what way and where the purchase decision is made (within the family, with friends, etc.)

Continuing with our example:



Even in this case, we could go on: Travel with family or with friends? How many times? Prefer Italy or abroad? High, medium or low season? For how long? and so on.

It is already possible to see the quantity of segments that can be identified based on the different combinations of variables.

III. WHO/WHAT: by integrating the mapping of customer classes with that of what is purchased, it is possible to understand the consumers' unidentified latent needs.

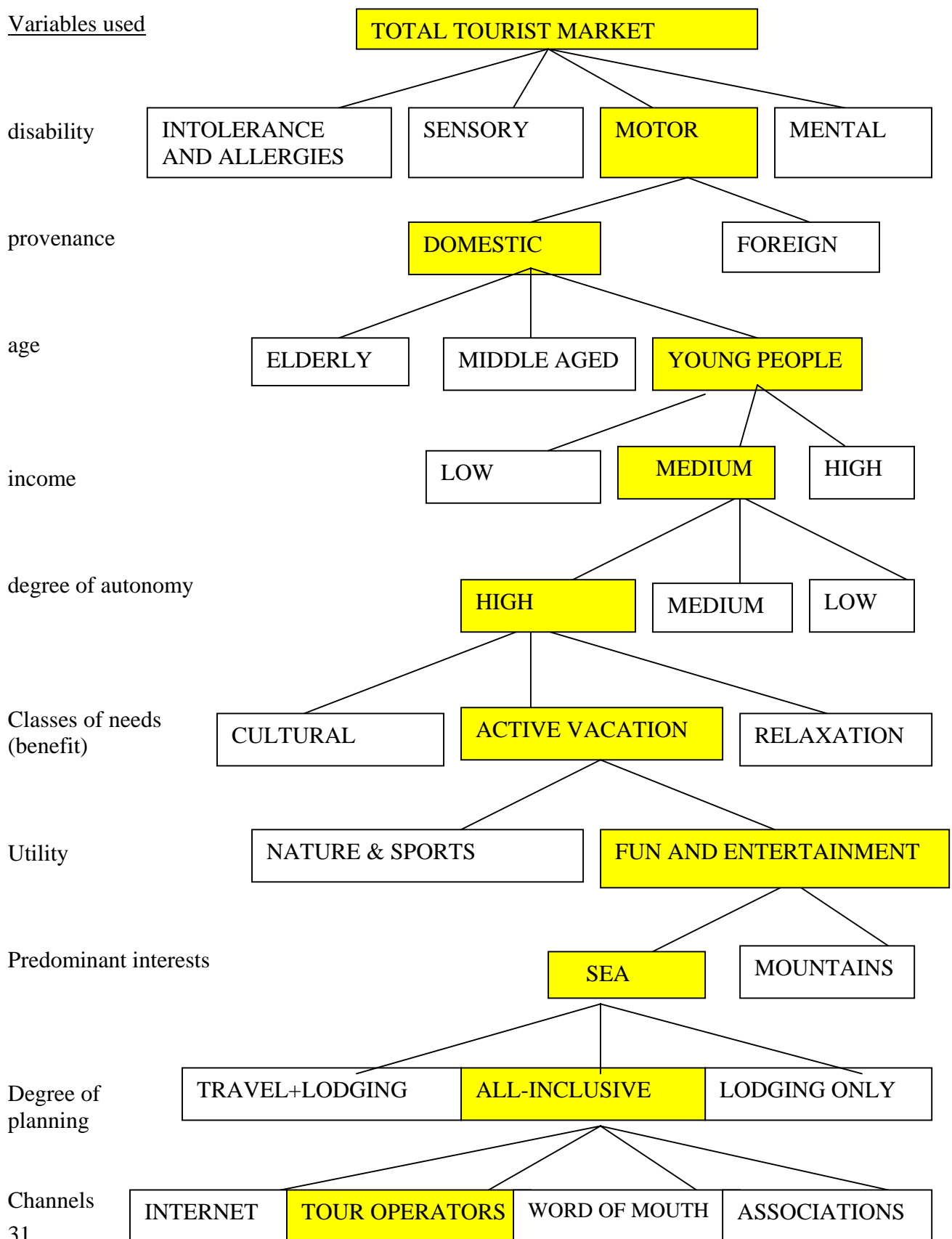
Thanks to this, it will also be easy to understand the specific motivation of that segment and, therefore, the critical purchase factor.

This is precisely the key to excellent marketing and promotion that is able to leverage off of the unexpressed needs and motivations, highlighting the specific relative product benefits.

Perhaps this type of customer needs an opportunity to socialize on their vacation and associates entertainment to the conviviality of the experience. So, they will purchase a vacation based on this need and the marketing strategy must leverage off of it.

Returning to the example

Variables used



3. PROFILE

"Travel tops the list of declared aspirations. Travel means emancipation, freedom, the search for, and consolidation of, love and relationships (family members, couples, groups), escape from routine, fun, learning, accumulating memories to spend during the year to demonstrate one's abilities and independence"⁶.

The profile of the segment's tourists must be a summary description that shows their characteristics, what they buy and why.

The profile of the segment in the example could be:

THE "LIVELY ONES": young people with motor disabilities but a good degree of autonomy. They prefer vacations characterized by fun and entertainment and they prefer seaside resorts precisely for this reason. They normally travel with family or friends and feel a need to socialize. The decision is made in the family, or with friends, and they turn to a trusted tour operator. The vacation must involve play and, for them, this means activity, even sports during the day and discos at night. The ideal place to stay could be at the tourist village of a tour operator specializing in accessible tourism and, for this reason, trusted (such as "Viaggi del Ventaglio").

The profile should contain BEHAVIOUR MODELS that are associated to an appropriate product policy and a RECEPTION, INFORMATION AND DECISION MODEL that will be associated to an adequate communication, sales and promotion policy.

⁶ Statement of Franco Bompreszi, Milan, 17 February 2003, at a conference on the theme of accessible tourism promoted by the Ventaglio group within the BIT (International Tourism Exchange).

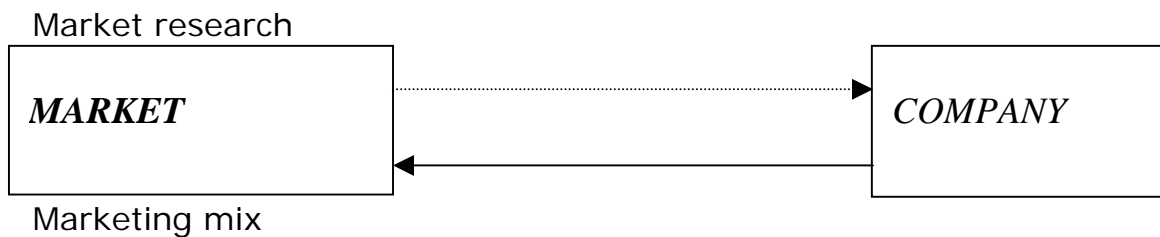
3. TARGETING

At the end of the segmentation process, the overall demand should be broken down into sufficiently homogeneous groups, in terms of behaviour, within and between them.

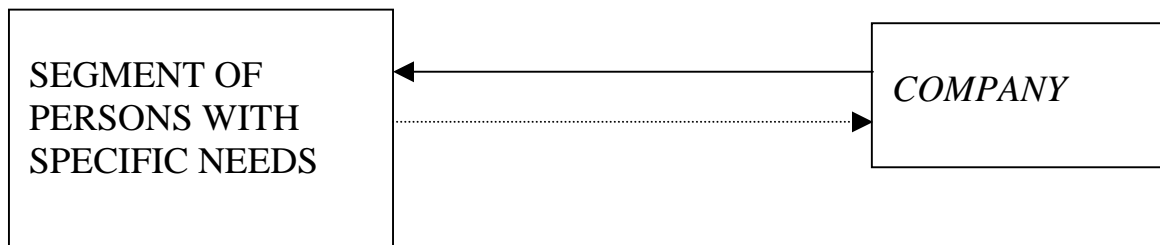
Targeting selects the segments to be inserted in the marketing policy.

One could, then, decide for:

1. UNDIFFERENTIATED MARKETING



2. FOCUSED MARKETING



A decision to work in just one segment often fails because it creates too much homogeneity among the clientele, who would complain about precisely that.

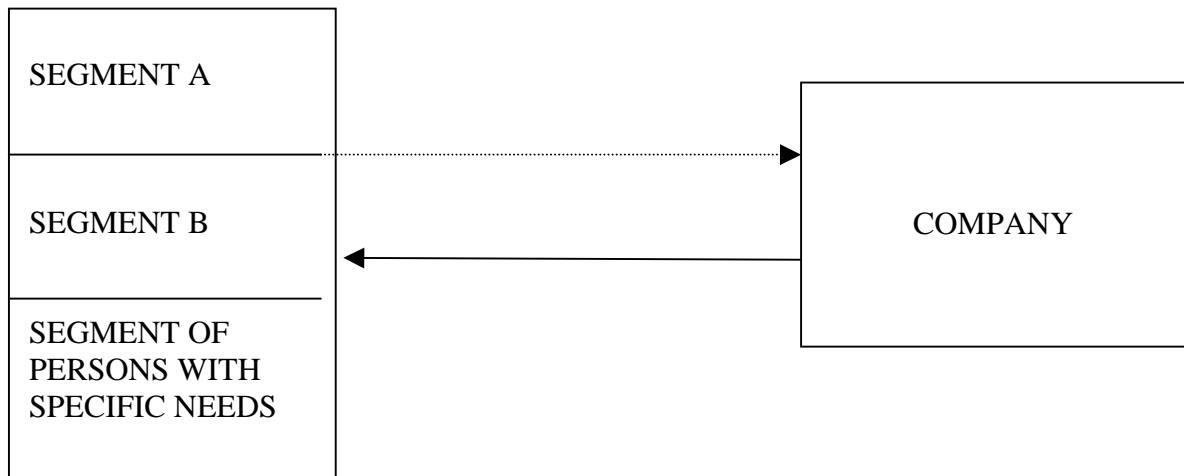
For example, this phenomenon occurs in the case of vacations for the elderly who, in referring to the clientele, often say they don't like it because "there are too many old people".

In addition, especially in the accessible tourism market, one could end-up creating the very "ghettos" that we are trying to avoid.

Peroni writes⁷ in this regard: "In all its meaning, tourism expresses a considerable level of social interchange and contact between different peoples, cultures and habits."

⁷ Giovanni Peroni, *Marketing Turistico*, Ed. Franco Angeli, page 72

3. DIFFERENTIATED MARKETING



This is certainly the safest and, thus, the correct marketing strategy.

In fact, it should be stressed that, in tourism, the clientele and its balanced assortment are a fundamental part of the atmosphere and the attraction.

When making the choice, however, it is necessary to put segments together than will be compatible with each other. For example, one should be careful not to put business customers together with school trips ... the result would be disastrous!

4. POSITIONING

Having chosen the target segments for the promotion and product marketing and, thus, having understood the latent desires that drive the purchase, it is necessary to know how our product is perceived in the customers' minds, precisely on the basis of the needs identified.

To identify how the product is positioned in the target's mind, we normally use *perception* and *preference maps*.

A graph is constructed where the X and Y axes contain ordered parameters selected on the basis of the customers' buying motivations.

We identify the space on the graph occupied by the "ideal" product most suited to the type of demand (preference map) and that occupied by the currently available product, both ours and the competitors' (perception map).

Therefore, the perception map highlights the positioning of the current product, while the preference map highlights the ideal attributes the consumer is seeking.

At this point, we have to adjust the levers that comprise the marketing mix so as to place the product inside the identified preference map. It should be emphasized that the positioning procedure is not a static operation but one that is conducted "continuously" and is, therefore, a process that requires constant intervention and that allows monitoring the correctness of the strategy implemented.

Returning to the example of the segment of young people with motor disabilities previously analyzed, the proper positioning requires understanding the decision-making criteria.

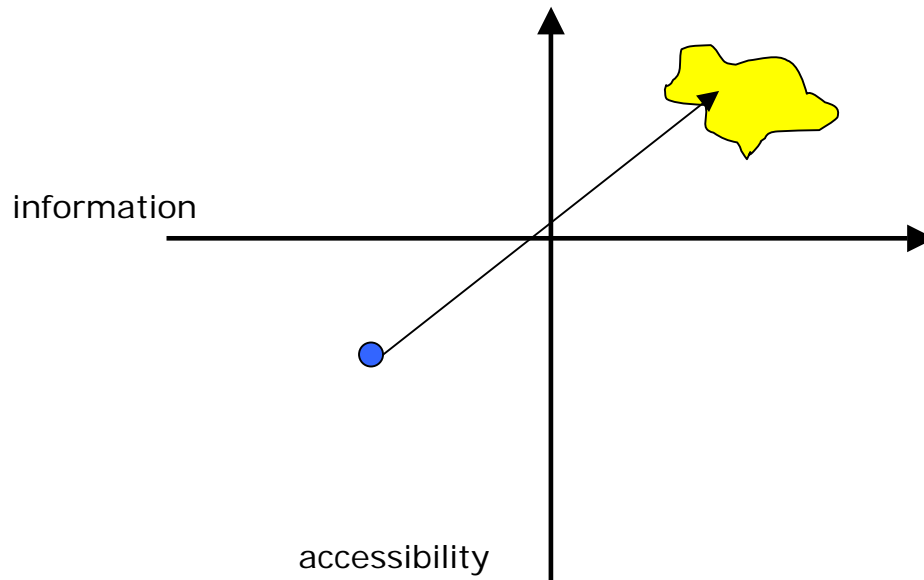
Given that, as seen previously, the criteria are the need to socialize, the opportunity to participate in organized activities, etc.⁸, we focus attention on the technical elements that are critical at the moment of decision.

After selecting their destination on the basis of their desires (seashore, mountains, art cities, etc.), persons with disabilities will check the accessibility of the places and living spaces of the facilities and the truthfulness of the information. These will become the critical elements in making the decision.

⁸"Accessibility in itself is not the reason for a vacation. Don't make the error of choosing a vacation using this method. Going to a hotel just because it is accessible is certainly not very satisfying unless it offers an opportunity to do something interesting that we like. Otherwise, it would be better to stay home."

Roberto Vitali, a contributor to the magazine, *Mobilità*, who prepared a list of instructions for travelers with special needs. This is rule number 4.

MOTOR DIFFICULTIES



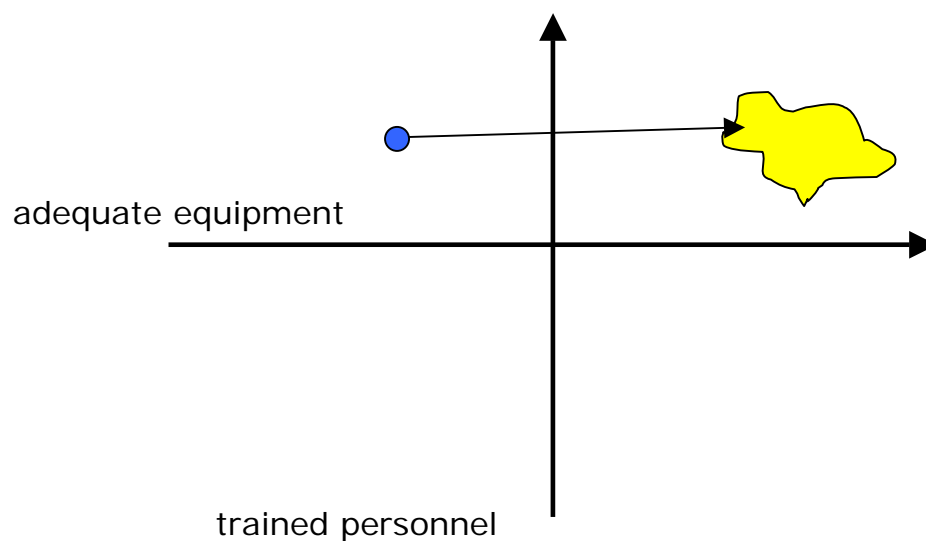
On this graph, one can see how the current product (blue dot) is positioned on the basis of the selected criteria. The preference map is represented by the yellow area, which indicates that the current product is far from the expectations of this target. So, the marketing mix should be prepared in such a way as to move the product towards the ideal position (follow the arrow)*.

* positioning made on the basis of data derived from the Eu.For.Me focus groups (see part about sources).

For a better understanding of how positioning works, we could use the example of persons with intolerances and allergies.

In this case, the parameters that can be analyzed could be the training of personnel in caring for areas and places, knowledge of the ingredients of foods and their preparation, and the presence of adequate equipment to adapt the food service and hospitality sectors to the needs of customers with this type of disability.

INTOLERANCE AND ALLERGIES



As can be seen from the graph, the current product is rather adequate as regards personnel training but often lacks the specific equipment that would give the product the ideal characteristics (specialized kitchens, hypo/non-allergenic environments, etc.).

5. INTRODUCTION TO THE MARKETING MIX

The marketing mix is the complex of the offering's manoeuvrable and controllable factors that influence demand.

The selection and manoeuvring factors provide the necessary information for establishing the best marketing strategy for the business, based on its characteristics and needs.

In the specific case of accessible tourism, the marketing levers that can be strategically manoeuvred to reposition the product are:

- **PRODUCT:** in this case, we're mostly talking about Quality as the product's ability to best satisfy the expectations of the target clientele. In the positioning analysis, we have already seen the important role played in the choice of product by information (clear, correct, specific and, above all, verifiable) and the accessibility, not only of the structures but also of the services (meaning the effective usability of the activities connected with providing the service).
- **DISTRIBUTION:** the distribution channels used in tourism are considered, with particular attention to those most used by customers with disabilities, in order to be present at the places and times when the acquisition of the product's perception is strategically the most important.
- **PRICE:** this is the element that must make the offer as attractive as possible to the target market. It is fundamental to understand how much the target is prepared to pay for the product offered and to make it as appetizing as possible through pricing strategies.
- **COMMUNICATION:** this includes all communication between the business and the target market aimed at increasing the tangibility of the product, emphasizing its ability to satisfy the consumers' needs, persuading consumers to buy.
- **PERSONNEL:** this item is added since it is of crucial importance to tourism for all. The preparation of the personnel to provide information and welcoming the customer is strategically fundamental.

A marketing mix structured in this way is, thus, a combined and finalized strategic manoeuvre that constitutes the essence of the marketing strategy.

Returning once again to the previous example of the young customer with motor disabilities, one could briefly imagine an "ad hoc" marketing mix:

- **PRODUCT:** it was already said that, in this case, the ideal product could be a tour operator's tourist village located in a seaside resort. Here, accessibility would certainly have to do with the structure and beach, which should also be equipped with special chairs that permit persons with disabilities to go swimming but, most of all, their effective participation in activities taking place in the village should be guaranteed (sports and recreational activities, excursions, etc.).
- **DISTRIBUTION:** we said that these customers usually turn to trusted travel agencies. For this reason, it is strategically important to distribute specialized catalogues containing detailed information about accessibility to the tour operator's sales points. On the other hand, when it is the tour operator that is "trusted," it's possible to make use of the short channel through the Internet, where it will be possible to find information and make reservations, or through a telephone call to a specific call-centre.
- **PROMOTION:** In Internet advertising and the catalogues distributed to travel agencies, it is fundamental to increase the tangibility of the product, especially for this specific target clientele, which must trust the information in order to buy. So, it could be useful to have well-known and expected endorsers (such as a motor-disabled athlete), or testimonials from those who tried the product and were especially satisfied. On the other hand, to emphasize an ability of satisfying specific needs, there could be a list of all the available services that increase the quality/accessibility of the product: the J.O.B.⁹, the opportunity to participate in sports, etc. However, what should be emphasized most is the entertainment and the opportunity to meet new people and participate in all those activities that allow socializing.
- **PERSONNEL:** it will be fundamental to prepare agency and call-centre personnel, understood here as the ability to provide detailed information tailored to the customer's specific needs. In addition, the personnel inside the structure must also be prepared to welcome these customers and correctly provide the service.

⁹ The J.O.B. is a special chair that allows persons who use a wheelchair to access the swimming pool

MARKETING MIX

The marketing mix consists of five levers that the company uses, manoeuvres and controls to meet the needs of the target market.

THE PRODUCT

In terms of the classic life cycle diagram, the accessible tourism product is currently in the initial introduction and development phases.

In the introduction phase the product has only been “tested” by a few “pioneers” who should not be underestimated because, especially for this sector of customer, they function as trailblazers and can stimulate a valuable word of mouth.

In the development phase, on the other hand, the number of customers increases, costs decrease and there is still little competition.

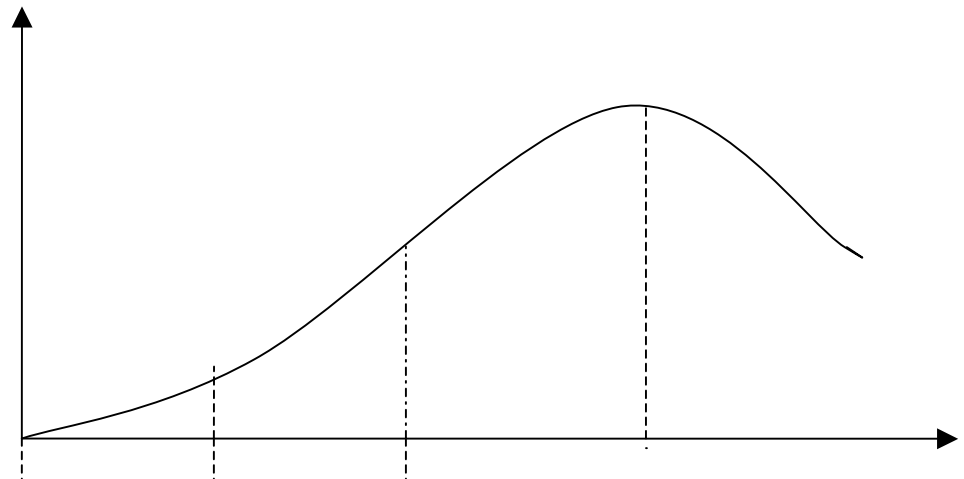
Understanding where the product is positioned allows choosing the most suitable marketing strategy, i.e., making the best use of this marketing lever.

For the accessible tourism product to become a marketing lever, quality must be carefully pursued through its entire industry chain. So, one cannot stop with a generically accessible product (a product that conforms to accessibility standards, which are often applied in an illogical, not very rational way), which is what has been offered to this point and that characterizes its current positioning. Instead, it will be necessary to design and prepare the expected product, i.e., the one that meets the desires of the specific target clientele, but not only; to be a quality product, it must go beyond the customers' expectations by incorporating unexpected characteristics and services. It will be precisely these additional, unexpected elements that will qualify the product and make it attractive. For example, a package addressed to the elderly should carefully develop (and publicize) those additional elements of the service that have to do with the availability of medical care, low-calorie or hypoglycemic menus, safety systems, etc.

It is also important to emphasize that there is a close connection between product and communication policies.

Therefore, acting on the product means improving it in terms of quality and the expectations of the selected target customer so that, together with the other components of the marketing mix, it can become a lever for repositioning.

Market characteristics, price strategies and type of customers in the various phases of a product's life cycle.



introduction	development	maturity	decline
- Low sales volumes - Few competitors - High costs	- Growth of sales volumes - Increased competition Costs decrease	- Reduced growth of sales volumes - Market saturated with competitors	- Decreasing sales volumes - Decrease in competitors
High prices	Price reductions	Further price reductions	Rising prices
Pioneers	Early adopters	Majority	Late adopters

CRITICAL TOURISM PRODUCT QUALITY FACTORS

Taking a trip can be divided into two phases:

- BEFORE
- DURING

The "BEFORE" is the phase before departure and involves gathering and checking **information**:

- Detailed, inasmuch as it must contain the detailed description of the facilities and environments (measures, presence of specific devices and techniques, etc.), without, however, providing ratings of accessibility so that each person can judge accessibility based on their own specific needs;
- Verifiable and reliable, inasmuch as one of the critical points is precisely the difficulty of interpreting the symbols used, identifying the accessibility criteria used and communicating with the staff, who are often unprepared and give inexact answers;
- Accessible, i.e., easily reachable and usable by all. We are thinking, for example, of the difficulties that persons with sensory disabilities have accessing on-line sites.

Hence, to be able to define a tourism product for persons with specific needs as high quality means that it must contain detailed, precise information about:

- The accessibility of hospitality structures, landscaped and natural areas, and places of artistic and cultural interest.
- The usability of means of transportation, but not only information about the accessibility of the means themselves but, more generally, the entire system: stops, ticket offices, waiting rooms, etc.
- Urban itineraries, since moving around in a city that you don't know requires at least having essential information (parking, preferred routes, toilettes, etc.)
- Details about tourist reception agencies, health facilities and all the information necessary for planning the visit and vacation in the most satisfying way possible.
- The sources where the various information can be found are: those classic sources of tourist information such as tourism agencies, IAT, APT, Pro Loco, etc., keeping in mind that, in their publications, the accessibility symbols often refer to generic, unreliable information; those related to specialized organizations.

- This information can also be accessed directly (through the Internet, returning to the same places, word of mouth, etc.) or indirectly, through intermediaries (travel agencies, associations, social cooperatives, etc.).

The "DURING," on the other hand, has to do with the actual enjoyment of the vacation planned in the preceding phase. The information previously gathered is validated and expectations are satisfied, or not, by experiencing the service. Consequently, in this phase, the critical quality factors will be determined by:

- the structural quality, such as the capacity of the facility and its equipment (parking, assistance, equipped greenery, etc.)
- the quality of the accessory services understood as the degree of involvement in recreational, cultural activities, sports and fun and, thus, the possibility of using and participating in safety.

However, it should not be forgotten that tourism is a system phenomenon whose offering is a complex product that interacts with other sectors.

In fact, it is not only necessary to take into account hotels, restaurants, recreational and sports facilities and brokerage services but also the world of commerce and crafts and, more generally, the wide range of products and services used by tourists (transport to, and at, the destination and services for using cultural and environmental assets such as museums, fairs, shows, exhibitions, etc.).

Since the Italian tourism industry is a mixed system, it will require continuous collaboration and communication between the public and private sectors to build an accessible tourism system of quality.

In the specific case in point, we will analyze information, structures, transport and attractions precisely from this system point of view.

INFORMATION

The quality of information is an extremely important aspect for the development of tourism for all. Accessible structures are often underused because persons with disabilities are not aware that they exist. Moreover, the demand for accessible tourism is limited by the need to rely on sources of information that are often not as reliable as they should in relation to what the users of such a delicate form of tourism, persons with disabilities, have a right to expect.

Accessibility, the possibility of finding it and its reliability are the fundamental characteristics of information quality.

In order to be understood, information must first of all be physically accessible by persons with specific needs. For example, the sign describing a work of art must be located at the right height for persons

using wheelchairs, must contain characters in relief, in a colour that stands out from the background and of adequate size, so as to be read by those with poor vision (the use of these characters is preferable to the use of Braille, which only a minority of non-seeing persons know).

The need to find information about various tourist destinations is a problem that potential customers with specific needs must confront when they decide to take a vacation: for example, a person suffering from food intolerance has a strict need for information about the availability of differentiated menus in hospitality facilities while a person with allergies will need information about hypo/non-allergenic environments.

For other types of disabilities, such as, for example, motor or sensory disabilities, information will be needed about the physical accessibility of the structures and their real ability to host customers with specific needs by offering them the same services prepared for normal customers.

The difficulty in finding this type of information is, most of all, dictated by the absence of universally used methods for measuring the accessibility of the structures that comprise the tourism industry. This difficulty is further amplified when one realizes that the little information available about the accessibility of facilities is not, in most cases, very reliable given the scant inclination to develop this market, which could potentially have an important economic impact.

More reliable quality information would allow disabled tourists to diversify how they spend their leisure time by offering them the opportunity to choose their tourism destinations freely without necessarily always having to go to the same places they are familiar with and that are, therefore, considered "safe".

To be qualitatively competitive, a hotel's tourist brochure should not just display a generic accessibility symbol but should also provide information about the characteristic of living spaces and customer care policies: area dimensions, the presence of special and differentiated menus for customers with intolerances, whether or not there are hypo/non-allergenic environments.

For example, Viaggi del Ventaglio has prepared a catalogue for their tourist villages with information on accessibility containing dimensional data about the structures and types of foods used, plus information about ways of getting there from the airport.

STRUCTURES

The needs of persons with disabilities are entirely similar to those of other customers; the difference lies in the conditions needed to satisfy them. The difficulty in finding a response to their own specific needs prevents access to the majority of tourist offerings and discourages the demand for accessible tourism.

The accessibility of hospitality structures, whether hotels, villages, vacation homes, holiday farms, bed & breakfasts or campsites must allow disabled guests to highest level of autonomy and independence.

It should also be clarified that it is utopian to think that there could be one hotel that is accessible to all types of disabilities but, with a few practical techniques, the current situation (few accessible structures, scant and/or relatively poor accessibility, etc.) could be improved.

The systems that have to do with mobility in hospitality and extra-hospitality structures have four principal aspects

1. horizontal mobility: these are dimensional characteristics of the connection routes and accesses between the various functional areas of the structures.

2. vertical mobility: stairs and changes of level are very serious obstacles for persons with disabilities. To allow access to the structure's various levels and services that are not located on the ground floor, it must be possible to overcome changes of level using means such as: fixed or mobile ramps, elevator platforms and stair elevators.

3. the use of living spaces: each room must be organized to allow easy use by persons with disabilities by paying particular attention to the arrangement of furnishing elements characterized by comfortable shapes suitable for use by all customers.

4. observance and integration of the various laws (architectural barriers, safety, fire prevention, etc.)

A fundamental characteristic of both hospitality and extra-hospitality structures is the ability to satisfy its customers by removing the architectural barriers that obstruct accessibility and the mobility not only of customer's with disabilities but also those of other customers, such as women who are pregnant or using strollers, the elderly, etc.

As specifically regards the foodservice sector, the quality of a restaurant's service could also depend on whether it is accessible. In some restaurants (in an increasingly greater number) it is possible to find responses to special food needs: there are an increasingly greater number of restaurants for celiacs or traditional restaurants that offer differentiated menus to meet their customers' needs.

TRANSPORT

Transport is the connective tissue of travel; a distinction needs to be made between transport to reach the tourist destination (air, ship, bus, train) and local means.

Sea/lake transport: as regards sea transport, accessibility standards have already been adopted for customers with special needs: for example, companies such as Corsica and Sardinia Ferries, Grandi Navi Veloci, Moby

Lines, Tirrenia and SNAV have adapted their ships to be able to transport and host customers with disabilities.

Air transport: airlines and airports have had an acceptable level of accessibility for some time; the problems are more in the procedures and some airline's requirements for medical documentation than in the impossibility of providing services. The acceptance of persons with disabilities (specifically persons with reduced mobility) is governed by international protocols rather than internal company procedures. As regards airline reservations, passengers are required to notify the agency or airline of their presence on-board, the type of reduced mobility and any assistance needed. This is fundamental for preparing the reception and assistance for embarking and debarking from the aircraft as well as waiting time inside the departing, connecting and arrival airports. The presence of a companion can be required for customers who are not able to provide for their own personal needs, for persons in particular health conditions and for the deaf and blind.

Highway transport: this is very problematic because most tourist and regular line motor coaches are not equipped to transport persons with disabilities who use wheelchairs. The number of vehicles on the road that can be considered accessible is limited but it's possible that the development of this branch of tourism will improve these conditions.

Rail transport: accessibility to railroad services, and the relative assistance, still depends on the situation of individual stations, lines and trains. For example, Trenitalia has created assistance centres for customers with disabilities: these assistance centres handle customer requests by providing information, reservations and assistance at stations to get on and off of trains.

There are also services available for a charge: for Eurostar trains, it is possible to use a transport service between home and station and home delivery of tickets.

There is also the Carta Blu: this is a membership card reserved for disabled persons living in Italy with social security companion benefits that allows buying an ordinary ticket valid for two persons.

ATTRACTIONS

A tourist resort's attractions are the first things considered when choosing a destination. As regards customers with special needs, the structures comprising the area's system of attractions must have the accessibility features that will allow their use by everyone.

Seaside resorts: in view of the growing demand for seaside vacations, it has become necessary to equip beaches with gangways, showers and slides that allow persons using wheelchairs to enter the water, comfortably overcoming the water's edge.

Structures for cultural and leisure time activities: there is generally little attention paid to the complements of a stay that ensure its success. It is only in the larger cities that access is provided to some cinemas and theatres and advertised in the papers by the regular addition of the accessibility symbol.

Green areas: the subject of accessibility to natural areas has only recently been addressed and only a few areas have created accessible educational nature paths to observe wild flora and fauna. Among the first Italian parks to have installed paths intended for expanded use we mention Parco Nazionale della Majella, with its Lama Bianca path, and the Parco Nazionale Abruzzo Lazio e Molise with a path for the vision-impaired.

Cultural heritage: museums are progressively adapting to accessibility criteria; the greatest difficulties are encountered in archaeological areas where, in order to preserve the cultural asset, it is only possible to intervene in a reduced manner; for example, the archaeological site of Pompei is partially accessible to persons with reduced mobility.

In most cases, tourists with disabilities are faced with objective limitations on their visits. In some cases, virtual digital reconstructions of sites have been created to allow everyone to use cultural attractions. In this way, tourists can overcome the architectural barriers and have the possibility of visiting the cultural attraction, even if not directly.

Other solutions for allowing the expanded use of cultural assets consist in preparing plaster reproductions in scale of some works of art in order to make them accessible to the visually-impaired.

THE PRICE

Like the other levers of the marketing mix, the price is defined based on the strategy to pursue.

As was already mentioned, accessible tourist products are still in the market introduction phase or, at most, the development phase, whose principal characteristics are: low, but growing, sales volumes, **few competitors and high costs**.

In this phase, the prices charged are normally rather high, later falling with the passage of time and the various phases of the product life cycle.

When a product is in the introduction phase, one good strategy could be that of using the penetration price, which is a relatively low price that allows opening a breach in the target market of interest.

In fact, offering a product at a reduced price for a period of time can be a tactic for inviting the customer to try it so as to become known and, possibly, appreciated, stimulating repeat purchases and highly-appreciated "word of mouth". Often, in addition to serving as a lure, a reduced rate often unblocks latent demand, transforming it into a purchase and allowing the potential customer with special needs to take a trip or vacation for the first time.

For example, a pizzeria that decides to sell a gluten-free pizza for celiacs could, in order to become known, offer special, lower prices for this type of pizza for a certain period of time. Moreover, one should not underestimate the fact that those going out to eat who suffer from this intolerance are not very likely to go alone, but will almost certainly be accompanied by persons who will order the other dishes on the menu and, so, charging a lower price doesn't necessarily mean a loss.

The same could be said of other types of products for all, keeping in mind that this is a purely economic strategy.

In certain periods when we want to increase sales, offering prices that serve to "lure" customers means avoiding the risk of unsold inventory (and tourism products are generally non-storable!). However, special offers must be designed with care based on the selected target and coherent with the other components of the marketing mix (one of the most common errors is to use just one price policy) and with foresight so they don't lead to failure.

In fact, it should be kept in mind that, sometimes, when prices are too low, they give the impression that the product is shabby. In this regard, it should also be remembered that even the price "communicates" and that the penetration price must fall within a targeted sales promotion strategy.

On the other hand, when the objective is to build customer loyalty, "frequent guest" cards can be used for regular customers that provide the right to price benefits.

If a hotel that has "accessible" rooms gave loyalty cards to its frequent guests, these could include arrangements with other "accessible" businesses in the area (restaurants, stores, bars, etc.) willing to apply a small discount to cardholders (from the point of view that an integrated tourist system is more profitable for everyone).

One good strategy could also be that of providing one free drink every "so many". For example, returning to the example of the pizzeria that offers gluten-free pizza, one could also make the offer of "every ten *special* pizzas, one free," when the restaurant has become known and wants to build the loyalty of the customers it has earned and lock-out the competition.

It is also important to remember that this is not a welfare plan but planning a strategy that uses price, along with the other components of the marketing mix, as a lever that contributes to achieving the hoped-for product positioning based on the expectations and specific needs of the target customers, in accordance with the present objectives.

DISTRIBUTION

A distribution channel is defined as the set of all steps through which goods or services are transferred from production to the consumer.

As regards tourism, particular attention needs to be paid to distribution given that its objective is to take the product to the consumer, and not the other way around as happens in the distribution of tangible goods, by providing travellers all the information they need to select to the purchase most suitable for their needs.

The various players, or rather the intermediaries, are very important since they have strong influence on the target and final consumer's decision-making process in the selected market sector.

The choice of a channel strategy consists in defining the purchasing behaviours of consumers and users, in general.

Distribution channels can be classified into three types based on the role played by the intermediaries on the line that runs from product to consumer

Channels can be:

DIRECT OR SHORT: these are direct sales of services from the producer to the consumer

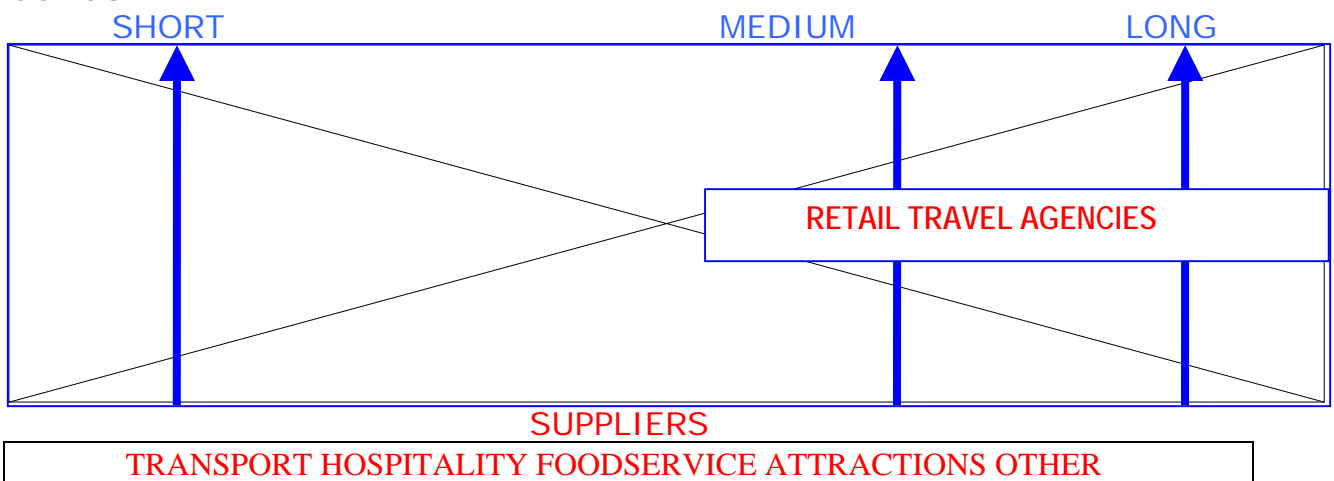
AVERAGE: these are characterized by the existence of just one intermediary

LONG: these are characterized by the presence of several intermediaries.

Tourism business select a channel based on their marketing strategy.

DIRECT CHANNEL
CONSUMER

INDIRECT CHANNEL



Using a general diagram, it is possible to identify the actors influencing tourism for persons with specific needs and how distribution can be accomplished.

Distribution through the short channel can occur via the Internet and call-centres.

When a supplier decides to use this channel, it must take care to make the means used accessible to all types of disabilities: it will have to adequately train its contact personnel, produce accessible sites, use adequate terminology, etc.

The short channel is excellent for accessible tourism because it allows the customer to find information by turning directly to the one offering the tourism product without the need of intermediaries. In addition, it allows customers to put packages together based on their own preferences and needs, trusting their own knowledge.

There are negatives, however, to the customer's choice to use the Internet to book a tourism product. The accessibility information found on a web site is often not reliable or, in any case, easily verifiable. Plus, the customer has no intermediary to turn to should the vacation not go as planned.

In the medium channel, the supplier sells its service to an intermediary, generally a travel agency in the case of tourism products. This channel is appreciated by those who are not familiar with computer systems or who are seeking a consultant, in this case the travel agent, who will provide security and will recommend solutions adequate to their needs. This channel presents limitations when the agency's personnel do not have the necessary skills to respond adequately to the customers' questions regarding accessibility.

In the long channel, the supplier is a tour operator who puts together a tourism package and sells it to end users through catalogues shipped to travel agencies.

This type of channel is preferred by those who do not feel like organizing the trip directly but would like to purchase a pre-packaged trip, limiting their involvement to selecting the one that is most satisfactory. Consumers very often choose this solution, putting themselves in the hands of a tour operator they consider reliable.

A supplier who wants to offer its products to customers with disabilities will have to provide a detailed description in its catalogues of the services that the structures offer in order to allow customers to evaluate the value of the offer and, especially, its adequacy to their needs.

In addition, the offer of ad hoc services must avoid creating ghettos that marginalize customers with disabilities.



Currently, the channels most used by suppliers are the short ones since there are few tour operators addressing packages to customers with specific needs.



COMMUNICATION

Communication is the set of messages, actions, means and tools an organization uses to contact its internal (employees, suppliers, shareholders, etc.) and external (customers, stakeholders, influencers, etc.) public and on which the way it is perceived depends.

The more tailored the message to the public of reference, the better the company's image, so long as attention is paid to the opinions of influencers and, especially, if the organization's professed intentions (communication policy) are coherently implemented.

It should also not be forgotten that the tourism product is complex and diversified: one of the most important tourism communication problems is, therefore, that of coordinating the various components of the offer to provide a unified image.

1. IDENTIFYING THE PUBLIC TO WHOM THE COMMUNICATION IS ADDRESSED

For those working in tourism, the final user, or tourist, is not the only intended recipient of the communication. Often, contacting the tourists requires addressing communication to a series of objectives that are intermediate stages through which the consumer can be effectively reached.

The public that is the objective of a communications plan for an accessible tourism product can be broken down into:

INTERNAL PUBLIC

⇒ Employees: through a process of internal communication that can function as a "motivational lever". The communication plays a fundamental role in managing human resources, especially when working with this type of clientele, since the staff is an important marketing lever.

⇒ Suppliers and shareholders: These are mostly interested in economic and financial information.

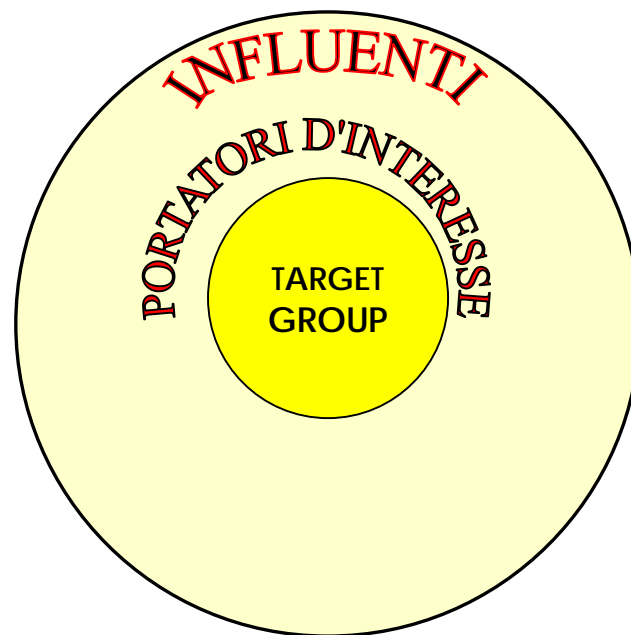
EXTERNAL PUBLIC

⇒ Target group: customer segments identified through segmentation and targeting, distinguishing between those that already consume and potential buyers;

⇒ Stakeholders: organizations that operate in the social, political, economic, technological, legal and ethical context. In the case of accessible tourism, these can be intermediaries, agencies, and

institutional forces, trade associations (Federalberghi, Fiavet, etc.), tourism promotion agencies (APT), business associations (Confcommercio, Confartigianato), etc.;

⇒ Influencers: it is possible to transmit information through them with a significant amplification effect and with psychological relevance different from advertising. In the specific case of tourism for all, these can be all those who already take accessible vacations, press representatives, cooperatives and associations for persons with disabilities, tourism promotion associations, local communities, etc.



It is important to choose a communication policy understood as a system of principles, standards and limits regarding the behaviour that one decides to maintain in the field of communication (such as, for example, transparency in internal and external relations, or a constant social and cultural commitment, etc.) and that the communication strategy adopted towards the various selected targets is coherent with that policy.

It is also necessary to evaluate and measure the product's image in terms of the customers' opinions. This is possible thanks to positioning, through which one can develop a profile of the ideal image to set against the current one.

Returning to the example of the person with motor disabilities, if one wanted to improve the product's image in terms of the quality of the

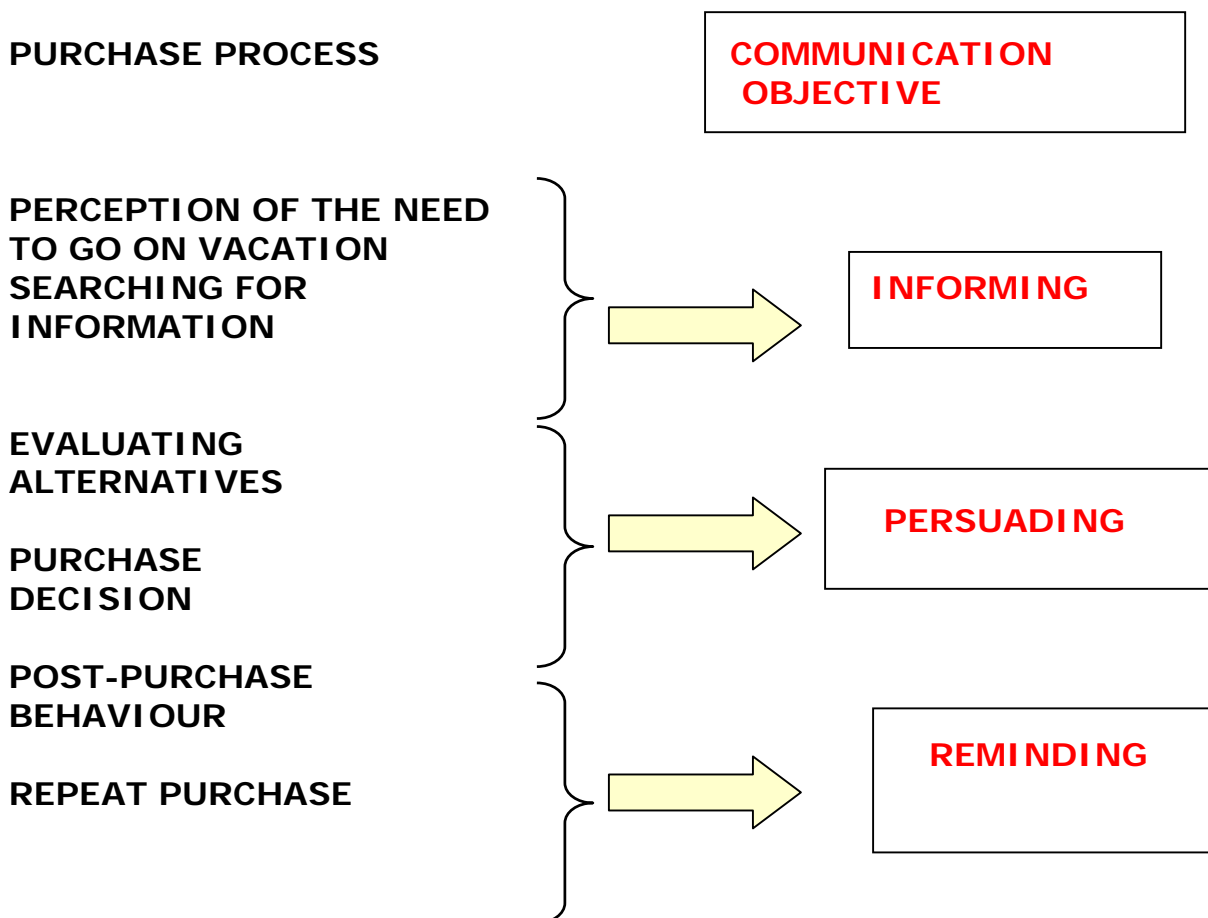
information and accessibility, the image will have to be, in any case, coherent with the reality of the resources present.

The repositioning strategy must be understood as the combination of structural, organizational and communication changes for the purpose of eliminating the negative elements of the total image by working on two peculiar aspects.

It is this specific public, which the communicator wishes to address, who will influence the content of the communication, the way in which it will be conducted, the time to do it, the place to offer it and the subject to be selected for the communication itself.

2. DEFINITION OF COMMUNICATION OBJECTIVES AND STRATEGY

The choice of the communication objective is closely tied to the customers' buying process, i.e., the phases that anyone goes through to reach the act of purchasing.



The choice of the level of stimulation of the market is closely tied to the purchase process phase; if one is in the initial phase, the main objective will be to inform the target public. It will, therefore, be necessary to:

- provide accessible, correct, complete and verifiable information, knowing how important it is for this customer segment;
- choose channels for promotion and ad hoc sales;
- prepare the personnel so that they know the specific needs and can answer any question promptly and correctly.

We know how crucial the acquisition of information is for customers with specific needs and, for this reason, how important it is to work on this lever of the marketing mix. In fact, if we don't make the grade in this phase, it's almost impossible to go on to the purchase phase.

On the other hand, if the objective is to persuade or remind, actions will be aimed more at promoting sales.

The communication strategy must be correlated with the target of reference and the objective.

As we have already seen, the life cycle of a tourism product can be found in an introduction or development phase and, thus, the main objective is to inform and leverage off of the advertising and the effects of social imitation.

The communication strategy to adopt could, thus, be of this type: *"continuous contact with stakeholders through periodic information tools and with influencers through targeted public relations tools, together with product communication aimed directly at the target through periodic information campaigns supporting promotional activities."*

3. DEFINING THE PROMOTIONAL MESSAGE FOR AN ACCESSIBLE TOURISM PRODUCT

With the needs of the specific target well in mind, the promotional message could revolve around their needs, desires and expectations. This message must indicate the fundamental benefit that the product offers and the reason why it should be selected.

This is the moment where we have to decide *what to say*. Normally, tourism uses emotional lures that have to do with feelings of love, joy and pride and satisfy the need to escape. It is also important, especially for this specific target, that the message not descend to the "pathetic" with the risk of being only irritating and produce the opposite of the desired effect.

Then we decide *how to say it*. This is precisely the moment that requires careful choice of language, seeking to avoid terms that are, by now, obsolete, and that can be offensive, such as the word “handicapped,” and remembering not to use labels that characterize the disability but that put the person at the centre of attention. It is important to highlight the product attributes that most meet the specific needs, while taking care not to over-emphasize them. This type of customer appreciates the clarity, completeness and, most of all, honesty of the information and it is precisely this that could be the winning element in the promotional message.

Finally, we have to decide *who to tell it to*. Having made the point that the truthfulness of the message is its strength, it could be important to seek the contribution of the influencers in the phase whose objective is to inform. Those who have already tried the product in person and, possibly even liked it, can be an authoritative source, as well as all the associations that persons with disabilities trust.

4. COMMUNICATION MIX

The communication mix includes all communication activities and, thus:

- Public relations
- Promotion
- Advertising
- Direct Marketing

Each of these uses specific communication tools and we list some examples below:

Public Relations

Educational

Special events

Press releases

Press conferences

Press reviews

Workshops

Trade fairs, shows and exchanges

Documentaries

Newsletters

Bulletin boards

Promotions

Discounts

Contests

Coupons
Prizes
Participation in fairs
Events
Incentives

Advertising
Spots
Classified ads
Posters
Brochures
Catalogues

Direct Marketing
Mail and e-mail
Telemarketing
Direct advertising
Sales communications

Below, we provide some suggestions for each type of activity depending on the public of reference being addressed

PUBLIC RELATIONS

- towards *influencers*

educational: these are familiarization and informational trips normally addressed to sellers and employees in the sector. We have already talked about how important it is for this target clientele to be able to trust the information. So, allowing those who will have to convince the customer – and whom the customer trusts – to try the product can be a targeted and intelligent strategy, even for those precious tips that operators may learn during this experience. In short, it creates direct, bidirectional contact, and, therefore, particularly valuable;

press conferences: to be organized only when we need to give journalists important information;

workshops: these are working meetings organized to put demand in contact with supply. In addition to being an excellent source of information and promotion, they can be widely used to allow operators to get in-depth information about specific needs and, thus, the "ad hoc" product capable of satisfying them;

newsletters: these are informational bulletins that briefly summarize and communicate news and facts. Thanks to their low cost, they can be issued frequently enough to provide continuously updated information. For this reason, they are a valid information tool, not only for influencers but also for stakeholders and customers.

- towards *stakeholders*

conferences: these are events that are similar to conventions, dedicated to a specific subject but directed to an open public. They can be an important tool for creating awareness and sensitizing the stakeholder public;

participation in trade fairs, shows and specialized markets: the presence of an image booth at these events is useful for distributing informational materials and, especially, for making contacts with those working in the sector;

scholarships for those working on specific subjects: in addition to being a tool for getting oneself known and enhancing one's image, it is also an occasion to improve;

cultural activities: these are sponsorships of the restoration of works of art and structures, environmental and ecological programs, organization of exhibitions, etc. They are excellent tools for getting oneself known, ingratiating oneself with the public and enhancing one's image;

newsletters.

- towards *customers*

Internet web sites and e-mail: these are increasingly being used as a means of information and communication due to their speed but, most of all, for the convenience of gathering information without having to go somewhere. This aspect is especially appreciated by persons with specific needs. In this case, the skills that an operator must have to construct a Web site have primarily to do with its accessibility correlated to the specific needs of its selected customers. It will be useless to use text and images with complex characters and in motion if you are addressing persons with poor or no vision. So, adapting the Web site to the specific needs becomes an exceptional source of communication and promotion. In fact, the customer perceives the greater attention that the operator has paid and, for this reasons, is more favourably disposed to the product offered. The informative function of a web site is very direct and, thus, in

addition to accessibility, it is strategically important how the information is provided, which must be both succinct and complete, avoiding generic judgments of accessibility. Then, through e-mail and a possible freephone number, customers can request more information and the operator can interact with them, thus making one-way communication bidirectional;

Freephone number: this can also be an excellent tool for communications, information and direct contact with customers. Providing a freephone number communicates openness and transparency and, thus, sends customers the message that they can trust you. So, it becomes fundamentally important to train the personnel who must be prepared to provide efficient and exhaustive answers.

Newsletters;

PROMOTIONS

- towards the *trade* (brokerage and distribution sector)

participation in trade fairs and shows;

educational;

training courses: offering intermediaries training courses is essential since they will have direct contact with the customers, who must find specifically prepared personnel whom they can trust;

point of sale materials (catalogues, posters, manuals): in the case of tourism for all, it would be a good idea if the catalogues were integrated, i.e., there shouldn't be specific catalogues for customers with disabilities. However, since the information directed to this target customer must be particularly detailed and, thus, extensive, it is normally decided to produce a specific catalogue. One compromise solution could be to publish an integrated catalogue distributed to all customers that could, in turn, contain reference notes. One good initiative could also be to provide a manual for the operator at sales points that would provide reliable sources of information, correct procedures to use in each specific case, etc.

- towards the *target*

informational materials (catalogues);

brochures and booklets: this type of printed material serves to attract the customers' attention and, thus, entice them to get more information about

the product offered. They will, therefore, need to be attractive, with appealing images and brief, but effective, text. So, when one wants to work with customers who express specific needs, it means paying attention to the language used, putting the benefits in the foreground, and providing telephone numbers or a web site for more detailed information.

One strategic element could be placing an explanation alongside the accessibility symbol of the methodology that underlies it or mentioning that the personnel are prepared to respond to specific requests; these techniques will give the customers an impression of truly expert service and will instil trust, prompting them to seek more information about the product.

ADVERTISING

- Indirect

specialized and industry magazines: in this case, one has to make sure that potential customers know about the product and create curiosity to know more. This type of communication serves to stimulate curiosity and not inform, which is the task of a subsequent phase. This case also requires the same techniques used for booklets. Particular attention needs to be paid to the use of "slogans" that don't degenerate into the pathetic. Influencers could be used to convey the promotional message because, being experts, they make the advertising message more "effective". A presence in specialized magazines allows reaching specific *audiences*.

- Direct Marketing

direct mail: when the message can be directly addressed to a specific user, the results of an involvement plan can be much greater. The fastest, most comfortable and certainly least costly direct mail method is to use electronic mail. More information can be sent in real-time to anyone who requests it. Contact via e-mail can serve to remind someone about a product they already know and to provide information about promotions, events and everything else that could be attractive. In addition to the target customers, this tool can also be used as part of a public relations campaign to influencers.

THE PERSONNEL

In the marketing mix for services, a fifth “P” is added to the original four: Personnel.

Human resources are considered an essential strategic factor in the marketing mix for tourism services.

In accessible tourism the human factor is key.

First of all, the personnel that have contact with disabled tourists need to be correctly trained so that they can deal with each one's specific needs.

As was previously said, persons with disabilities who have to travel need reliable information provided in language that is adequate to their needs.

All personnel who have contact with customers, from the travel agent to those who welcome guests at the hospitality facility, i.e., all the personnel of every service included in the tourism package, must be skilled and professional in dealing with disabled tourists.

A customer with disabilities isn't any different from other customers.

With this always in mind, the principles that regulate a good interpersonal or service relationship involve both behaviours and the adoption of some logistical techniques that can increase the comfort and usability of spaces and equipment.

Customers with disabilities need a tourism package that has all the necessary “technical” requirements.

Operators who have contact with these customers must, therefore, understand:

- WHAT TO LOOK FOR: what are the technical requirements to take into consideration in relation to the individual needs of customers with disabilities.
- WHERE TO LOOK: where to find the technical requirements
- HOW TO LOOK: how to evaluate the validity of the technical requirements gathered.

Putting together a tourism product for persons with disabilities means taking into consideration the specific needs of the type of disability the person has.

It is necessary to listen to persons with disabilities in an open way, without preconceptions, keeping in mind that they are able express the needs of their own personal situation directly and better than anyone else.

When putting together a tourism package for a person with specific needs, operators must provide detailed and precise information, taking into account:

- aspects related to the presence, or lack, of architectural barriers
- aspects related to the presence, or lack, of aids and dedicated services
- aspects related to the language to use
- behavioural aspects in relations with the disabled person.

In putting together a tourism product, the operator's skills are important in two fundamental ways:

1. the search for an accessible structural situation
2. the satisfaction of the relationship with the customer

The search must take certain parameters into account from the beginning, some of which are already included in the operator's training and others that are discovered and refined during the dialogue with the customer.

The exchange of information between the parties is the product's real qualitative component.

In preparing a vacation, operators must start by knowing how to relate to the different types of disabilities and with the different specific needs.

Then, they must work to put the package together, researching and mapping the opportunities in the area involved.

A tourism product for persons with disabilities is of high quality when it provides:

- information about the accessibility of hospitality facilities, natural wildlife areas, and places of artistic and cultural interest.
- Information about the usability of means of transportation that includes not only the accessibility of the means themselves but of the entire system in general: stops, ticket offices, waiting rooms, schedules, itineraries, etc.
- Information about urban routes: moving about in a strange city requires at least certain essential information: parking, preferred routes and accessible toilets.
- Information about hospitality structures, tourist reception agencies, health facilities and all the information necessary for planning a visit or vacation in the most satisfactory way.

The classic sources of tourist information, tourism agencies, APT and Pro Loco, while using the accessibility symbol in their ads, refer to generic information that is not suited to the need.

The best sources are, therefore, those connected with specialized organizations.

Obviously, the most reliable information is that collected directly on-site by specialized personnel.

The methods for accessing information are:

- Information points (international, national, local)
- Organizations (associations, travel agencies, tour operators, institutions, social cooperatives)
- Guides
- Internet

The system for evaluating the reliability of the information found through the various sources can be identified using the following basic rules:

1. identification of a universal methodology for identifying the information;
2. evaluating the quality of the control system (when there is one);
3. controlling the meaning of every symbol used;
4. identification of the accessibility criteria used.

The quality of the data and information is of strategic importance for the success of a tourism product and, for this reason, the personnel that put together a travel package for persons with disabilities play a fundamental role since they must ensure and verify the reliability of the data collected. In order to have reliable, guaranteed information, surveys have been launched in many European countries to collect and validate information about the accessibility of facilities suitable for tourists with special needs. In Italy, we have developed the methodology known as IG-VAE (an Italian acronym for "Guaranteed Information for the Evaluation of Accessibility for One's Own Needs").

Operators who put together travel packages for persons with specific needs must follow these basic rules:

- gather informational material about the destination the customer has requested.
- determine if the tourism structures involved have a symbol referring to accessibility
- determine what value that symbol represents in the guide or brochure, and compare it with the needs expressed by the customer
- if there is no legend, ask the facility's management what the symbol means "to them" and try to get concrete information: one measure is whether or not there is a specific aid, without being satisfied by manifestations of "good will" in welcoming a customer with disabilities.
- give the customers the results of the research and allow them to make an independent, informed decision.

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