

Examining supply-side perspectives on the market for tourists with disabilities in South Korea

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Abstract: The purpose of this study was to examine the supply-side perspectives of the market for tourists with disabilities in Korea, and the differences, if any, between two representative sectors: accommodation and travel agencies. A self-administered questionnaire was developed and distributed to employees of these sectors via e-mail and on-site visits. A total of 369 responses were included in the final data analysis. Major findings indicated that employees of the two sectors agreed that tourists with disabilities have the same rights and desires to travel as tourists without disabilities; however, they do not seem to recognize the economic potential of the market. Secondly, both sectors are ill-prepared for the market, although the state of readiness is superior in the accommodation sector than in the travel agency sector. Implications of these results are discussed.

Keyword: market for tourists with disabilities, readiness states, perception, tourism industry, South Korea

1. Introduction

To date, it is estimated that about one billion people (approximately 15% of the world's population) have a disability (WHO, 2021), defined as including those who "have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others" (United Nations, 2006). In the case of the European Union (EU), 87 million people are registered as disabled (European Parliament, 2021), whereas about 61 million adults (26% of adults) live with a disability in the U.S. (Centers for Disease Control and Prevention, 2022). In the case of South Korea, as of 2021, the number of individuals registered with disabilities was approximately 2.6 million (Ministry of Health and Welfare, 2021). Considering the global trends of population aging, the number of disabled persons has been gradually increasing. In general, the market for tourists with disabilities has not gained much attention from the tourism industry since the nature of the industry is shaped by economic profitability and efficiency. As such, customers with disabilities remain invisible in the context of tourism.

However, the situation is gradually changing due to unprecedented interest in the market. Several researchers (Darcy & Pegg, 2011; Dwyer & Darcy, 2008; Israeli, 2002; McKercher et al., 2003; Moura et al., 2022; O'Neill & Knight, 2000; Ozturk et al., 2008; Ray & Ryder, 2003) have emphasized that people with disabilities also have the same travel desires and motives as their counterparts. Furthermore, it is suggested that tourists with disabilities have economic potentiality as a niche market (Yau et al., 2004). The enactment of disability discrimination laws in many countries (e.g., U.S., U.K., Australia, etc.) and international declarations (e.g., U.N. Convention on the Rights for Persons with Disabilities) have also contributed to this change. Tourism environments have become increasingly accommodating towards disabled travelers. However, a plethora of evidence exists demonstrating challenges faced by disabled tourists. For instance, tourists with disabilities suffer from inaccessible tourist facilities, information challenges, travel industry employees' lack of knowledge on tourists with disabilities, and inefficient disability services.

For tourists with disabilities to fully participate and enjoy tourism activities, many stakeholders, including the tourists with disabilities themselves, should collaborate to create

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complete and appropriate tourism environments. In this sense, the role of tourism companies becomes extremely important since they are responsible for fulfilling the travel desires and motives of tourists with disabilities by providing tourism products and services. Recently, academic research has been conducted to understand the travel experiences of tourists with disabilities and to promote their travel activities. For example, Lee et al. (2021) examined tourists with disabilities' service failures with complaint behavior by applying the concepts of affective events theory. Additionally, Moura et al., (2022) investigated travel motivations of people with disabilities. Unfortunately, as of now, little research has been conducted to identify effective methods in serving the market for tourists with disabilities from supply-side perspectives. This research seeks to bridge this gap. Therefore, the purpose of this study was to investigate the supply-side perspectives of the market for tourists with disabilities in South Korea. More specifically, this research identifies (1) overall perceptions of employees in tourism companies toward the market for tourists with disabilities, (2) current readiness states of tourism companies for the market of tourists with disabilities, and (3) the differences in terms of (1) and (2) between two representative sectors of tourism businesses (i.e., accommodations and travel agencies). As exploratory research, this study was expected to identify useful implications for expanding the market for tourists with disabilities in South Korea.

2. Literature Review

2.1 *The potentiality of the market for tourists with disabilities*

The potentiality of the market for tourists with disabilities is related to the travel demands of the disabled; however, little research has been conducted to identify demand. Thus, inferences can only be made from travel related characteristics of tourists with disabilities, their general consumption patterns or from several fragmented studies. Previous studies have highlighted the following characteristics of tourists with disabilities (Chikuta et al., 2019; Devile & Kastenholz, 2018; Turco et al., 1998; Westcott, 2004): they have the same travel desires and motives as tourists without disabilities, many of them have enough wealth to travel and are willing to pay for the expenses associated with traveling, they tend to travel with other care-givers due to their disability limitations, they tend to be more worried about the way people treat them than physical access, they tend to avoid crowded tourist sites, and they are loyal to service providers who are able to meet their specific needs.

Prager (1999) cited a Wall Street Journal article which indicated that the population of people with disabilities would occupy a significant portion of the market in every sphere of consumption, including tourism. In addition, Harris Interactive Market Research conducted research on several markets for tourists with disabilities on behalf of Open Doors, an organization supporting Americans with disabilities. Results of the study (Open Doors, 2002) revealed that 71% of people with disabilities in the US had traveled at least once within the two years prior to the study, and 20% of them had traveled six times within the same time period. Furthermore, 7% of those surveyed had traveled overseas within the same time period. Results of another study (Open Doors, 2005) showed that, in 2005, the estimated numbers of individuals with disabilities who traveled for either pleasure or business purposes was estimated to be about 21 million. Furthermore, research conducted by Touche Ross indicated that over eight million European tourists with disabilities traveled overseas at least once a year, over 15 million European tourists with disabilities took one domestic trip that included an overnight stay, and another 22 million European tourists with disabilities took a domestic day trip (Touche Ross, 1993). According to the results of another study, specifically focused on French citizens with disabilities, it was estimated that the number of French tourists with disabilities in 2019 was approximately 5.95 million (Michas, 2021). Similarly, in Australia, tourists with disabilities accounted for 11% of the total domestic tourists (Bureau of Tourism Research, 2011). VisitEngland (ENAT, 2009) suggested that 12% of England's domestic tourists who stayed at least one night away from home were composed of tourists with disabilities. In

addition, the study demonstrated that tourists with disabilities traveled a total of 5.7 million times per year, generating about £ 1 billion in economic benefits.

The potentiality of the market for tourists with disabilities can be inferred from their economic contribution to a nation (Buhalis et al. 2005; Dwyer & Darcy, 2008; Neumann & Reuber, 2004; Open Doors, 2005). Open Doors reported that, in 2002, people with disabilities in the United States took 32 million trips and spent a total of \$13.6 billion (\$3.3 billion for air transportation, \$4.2 billion for accommodations, and \$2.7 billion for food and beverage) (Open Doors, 2019). Recently, the Open Doors Organization (ODO) confirmed that over 27 million tourists with disabilities took a total of 81 million trips and spent \$58.7 billion on their trips (Open Doors, 2020).

Considering the above results, the potentiality of tourists with disabilities as a significant market segment should not be ignored. However, despite the economic benefits that tourist businesses could grasp from the market segment, tourism environments have failed to cater to the disabled community (Abeyraine, 1995; Card et al., 2006; Cavinato & Cuckovich, 1992; Daniels et al. 2005; Darcy, 1998; Imrie & Kumar, 1998; Israeli, 2002; Lee et al., 2012; McKercher et al. 2003; Smith, 1987; Turco et al., 1998; Yau et al. 2004). For tourists with disabilities, facilities and services (e.g., attractions, transportation, accommodations, restaurants, etc.) that can meet their needs are of critical importance during travel. This implies that tourism businesses should play pivotal roles in encouraging the expansion of the market for tourists with disabilities. The following section reviews research relevant in this area.

2.2 The market for tourists with disabilities from the perspective of tourism businesses

How much a tourism company benefits from tourists with disabilities depends upon various factors. The first is related to the level of recognition on the market as a niche market. A higher level indicates increased efforts a company dedicates to the market. The other is the level of preparedness in terms of facilities, information accessibility and trained employees. As a company increases its level of preparation, its reputation as a disability friendly company will also increase. To reach high levels of preparedness, a tourism company should be aware of and abide by laws concerning people with disabilities. At present, many countries require both public and private sectors to provide accessible facilities and information for individuals with disabilities unless it involves unreasonable expenditures on the basis of laws (e.g., Americans with Disabilities Act in the U.S., Disability Discrimination Act in Australia, Equality Act in the U. K., Anti-Discrimination Against and Remedies for Persons with Disabilities Act in South Korea). In addition, Article 30 of the Convention on the Rights of Persons with Disabilities, an international assembly, stresses the importance of accessibility to cultural contexts and urges all nations to join in an effort to enhance cultural experiences and improve the rights of people with disabilities (Darcy & Pegg, 2011). Tourism and related services are not excluded from this effort.

Given the significant role of tourism product/service suppliers in expanding the market for tourists with disabilities, scholars have conducted research from supply-side perspectives (Burnett & Baker, 2001; Darcy & Pegg, 2011; Grady & Ohlin, 2009; McGrath, 2009; Open Doors, 2002; Ozturk et al. 2008; Rice, 2006; Small et al. 2008). These studies can be divided into three categories. The first category includes studies that investigated the current state of tourism services for tourists with disabilities (Darcy, 1998; Israeli, 2002; Lipianin-Zontek & Szewczyk, 2019; McGrath, 2009; Small et al. 2008). Findings of these studies generally recognized insufficiency or inappropriateness of services in terms of the requirements of tourists with disabilities. For example, Israeli (2002) reported that the accessibility of tourist attractions for tourists with disabilities was at a lower quality than required. Additionally, it was revealed that only 0.75% of all available hotel rooms in Sydney, Australia was accessible to tourists with disabilities (Darcy, 1998). Small et al. (2008) discovered that advertisements of airline companies generally targeted wealthy tourists without disabilities and elite passengers without taking into considering those with disabilities. For instance, after analyzing

sport and recreation strategies released by 31 municipal governments in Australia, McGrath (2009) reported that although these strategies considered physical accessibility for people with disabilities, they seldom considered specific requirements brought about by types of disabilities. Recently, Lipianin-Zontek and Szewczyk (2019) evaluated the readiness of Polish hotel establishments to develop business tourism services for tourists with disabilities and emphasized that hotels in Poland should invest more on facilities and obtain financial support to create welcoming conditions for guests with disabilities.

The second category focuses on how disability related laws influence the tourism industry. Grady and Ohlin (2009) discussed the implications of the Americans with Disabilities Act in the context of providing fair service for those with a mobile disability. Upchurch and Seo (1996) studied how the ADA impacted accommodation sectors in the U.S. Both studies emphasized that it is a social responsibility for tourism companies to abide by the laws if they could not provide any clear evidence proving “unreasonable expenditure”.

The third category includes studies (Burnett & Baker, 2001; Darcy & Pegg, 2011; Grady & Ohlin, 2009; Open Doors, 2002; O'Neill & Knight, 2000; Ozturk et al. 2008; Rice, 2006; Takeda & Card, 2002) that investigated perceptions of employees in tourism related business in the market for tourists with disabilities. A general conclusion from these studies can be summarized as being unaware of economic potentiality of the market for tourists with disabilities and consequent non-committed approaches to the market. For instance, O'Neill and Knight (2000) investigated the perception of hotel employees in West Australia on the market for tourists with disabilities. They found that (1) no hotel considers the extent of accessibility improvement as a business performance indicator, (2) employees' perception of economic benefits accrued from offering service for tourists with disabilities is low, (3) there exists a widespread perception that the provision of disabled rooms is an added expense for the hotel, and (4) the market for tourists with disabilities is unprofitable. In a similar context, Burnett and Baker (2001) revealed that employees of American tourism businesses thought that it is costly to abide by ADA guidelines and had a negative opinion of the economic potential of the market for tourists with disabilities. Open Doors' study (2002) revealed that all of the U.S. tourism business employees interviewed expected an increase in the number of tourists with disabilities if some investments to enhance facilities or services for the disabled were implemented. However, according to the study, it was shown that only 20% of the interviewees would invest in these improvements. Rice (2006) discovered that managers in U.S. tourism businesses: (1) had no interest in satisfying the needs of the disabled, (2) had a narrow perspective of meeting the minimum guidelines regulated by building codes, (3) were unaware of the fact that securing nondiscriminatory and accessible facilities is an effective way of building and maintaining a competitive edge in marketing and service provisions, (4) were pessimistic about returns for the investment on accessibility improvements for tourists with disabilities, and (5) had no interest in making additional efforts to improve accessibility beyond the minimum standards set by local building codes. However, in a study on the perceptions of Turkish tourism employees on the market for tourists with disabilities, Ozturk et al. (2008) revealed that Turkish tourism employees were willing to provide services for tourists with disabilities. However, they mentioned that it was very difficult since tourism companies in Turkey were generally not well-prepared for tourists with disabilities. In addition, Takeda and Card (2002) found that there was a lack of understanding of the needs of tourists with disabilities among employees in tourism companies. As such, they suggested that travel agencies may face difficulties when developing travel packages for tourists with disabilities.

Some research results indicate differentiating views on the market for tourists with disabilities. For example, according to Grady and Ohlin's study (2009), employees in the tourism business in the U.S. perceived that the ADA is not only applicable to facility accessibility, but also to general services. These findings may indicate an attitudinal transition taking place within the tourism

industry. Results of Darcy and Pegg's research (2011) also revealed a similar phenomenon while investigating how Australian tourism industry employees perceive tourists with disabilities. Major outcomes of the study suggested that the respondents were enthusiastic about providing quality services for tourists with disabilities regardless of established laws or policy regulations. They indicated that understanding the needs or motives of tourists with disabilities was useful, and some additional efforts from both tourism business employers and employees were needed in order for them to serve tourists with disabilities more effectively. Based on these findings, Darcy and Pegg (2011) proposed that it is essential for such policies and strategies to be intensively implemented as attitudes change towards tourists with disabilities. The researchers noted the importance of safety, communication channels that enable tourists with disabilities to report their special needs or requirements to the employees directly, changes in attitudes of tourists without disabilities regarding rooms or facilities for tourists with disabilities, flexible operation hours of supporting equipment, refined standards going beyond laws or administrative orders, the need to approach tourists with disabilities as a market segment, and employee training or education programs (e.g., marketing and accessibility information delivery) to enhance their ability to provide services to disabled customers. Additional research conducted by Sy and Chang (2019) indicated that the employees in the tourism and hospitality industry in the Philippines had positive attitudes toward tourists with disabilities before training, familiarity with disability law, or prior contact with people with disabilities. Surprisingly, employees who have no disability awareness training hold more positive behavioral attitudes toward tourists with disabilities than employees who participated in training. Moreover, employees who had prior contact with people with disabilities showed less positive cognitive attitudes toward tourists with disabilities than did those who had no prior contact with people with disabilities. The researchers explained the reasons behind those results might originate from cultural and economic aspects driven by psychological conflicts between religious beliefs and structural constraints in developing countries. To summarize, the studies mentioned above indicate that the travel industry in general does fail to recognize the economic potential of the market for tourists with disabilities and their readiness for the market is insufficient. However, the vast majority of studies reviewed are confined to the Western world; thus, enhancing travel opportunities for individuals with disabilities requires further investigation from a global perspective.

3. Methods

3.1 Research instruments

A self-administered questionnaire composed of two sections was developed. The first section included seventeen items (e.g., 'The market for tourists with disabilities has a great economic potential,' 'The market for tourists with disabilities is an unprofitable one,' etc.) pertaining to perception of employees in the Korean tourism industry on the nature of the market for tourists with disabilities that were drawn from previous research (Burnett & Baker, 2001; Darcy, 1998; Darcy & Pegg, 2011; Grady & Ohlin, 2009; Israeli, 2002; McGrath, 2009; O'Neill & Knight, 2000; Open Doors, 2002; Ozturk et al. 2008; Rice, 2006; Small et al., 2008; Takeda & Card, 2002) and modified for the context of this study. Each item was evaluated on a five-point Likert-type scale (5 = strongly agree; 1 = strongly disagree).

The second section included twelve items (e.g., 'Has facilities for people with disabilities [ex: ramp, entrances, rooms, bathrooms, elevators, emergency lights, emergency alarms, parking spaces for people with disabilities, Braille menus, etc.]', 'Has customer service manual for a customer with disability,' 'Educates and/or trains employees regularly concerning customer service for people with disabilities,' etc.) measuring the states of readiness of tourism companies in South Korea for the market for tourists with disabilities. These were also derived from previous studies (Darcy & Pegg, 2011; McGrath, 2009; Ozturk et al. 2008; Rice, 2006; Small et al., 2008; Takeda & Card,

2002) and modified for the context of this research. A five-point Likert-type scale (5 = definitely yes; 1 = definitely no) was used to measure these twelve items. In addition, focus group interviews with employers and professionals in tourism service areas were also conducted during both phases.

3.2 Data collection and analysis

An online questionnaire was developed and sent to employees in the tourism and hospitality industry beginning from March 5, 2012, for three full weeks. The questionnaire and cover letter which explained the purpose and content of the study were attached to individual e-mail addresses which were obtained from several sources (e.g., list of members of Korean tourism industry associations, personally collected business cards of employees in the tourism industry). After a week from the first e-mail, reminder e-mails were sent to non-respondents. Two weeks after the second round, the letter and questionnaire were sent again to non-respondents. In spite of these efforts, only 78 questionnaires were returned. Due to small numbers of returned questionnaires, trained surveyors visited tourism companies located in large metropolitan areas (Seoul, Incheon, Daejeon, Busan, Gwangju, etc.) in South Korea to obtain more data between March 27-April 20, 2012. In total, 369 questionnaires were utilized for data analysis after excluding 44 questionnaires (either questionnaires were not completed, or questionnaires were from those who work outside of the tourism field). SPSS 20.0 was used to code and analyze data. Analytical techniques were confined to descriptive statistics (e.g., mean, frequency distribution, and standard deviation) and independent t-tests.

4. Results

4.1 Profile of the Respondents

Table 1 shows the characteristics of the 369 respondents. Of the 369 respondents, males and females were similarly distributed (51.8% and 48.2%, respectively). Respondents in their 20s and 30s commanded the majority, 36.6% and 36.9% respectively. For respondents' level of income, 36.3% earned between US\$ 2,000-2,999 and 33% reported a monthly income of US\$ 1,000-1,999.

Table 1. Demographic characteristics of the respondents

	Percentage
Gender	
Male	51.8
Female	48.2
Total (n=365)	100.0
Age	
20s	36.6
30s	36.9
40s	20.5
50s	6.0
Total (n=366)	100.0
Monthly Income (in USD)	
Less than \$1,000	1.6
\$1,000 to \$1,999	33.0
\$2,000 to \$2,999	36.3
\$3000 to \$3,999	16.2
\$4,000 to \$4,999	9.1
More than \$5,000	3.8
Total (n=364)	100.0

The majority of respondents (52.0%) worked in Seoul, the capital city of South Korea, and most of the respondents were either employed in accommodation (43.1%) or travel agencies/tour operator (42.5%) sectors. Approximately half of the respondents were in charge of customer service (49.7%) or sales (20.9%) and more than half of respondents (57.2%) had less than five years of work experience. 56% of the sample had experience in serving customers with disabilities, and 69.3% did not have family members, relatives, or friends with disabilities.

Since the majority of respondents worked in accommodation or travel agencies/tour operator sectors, overall perceptions on the market for the tourists with disabilities and readiness states of the tourism industry in South Korea was included in the following description of the results; secondly a comparison between accommodation and travel agency sectors will be presented after excluding responses from those who were employed in sectors other than the tourism industry.

Table 2 Employment characteristics of the respondents

	Percentage
Business location	
Seoul	52.0
Busan	9.2
Incheon/Gyeonggi-do	16.3
Gwangju/Jeolla-do	5.7
Daejeon/Choong Chung-do	6.8
Others	10.0
Total (n=369)	100.0
Types of business employed	
Accommodation	43.1
Travel agency/Tour operator	42.5
Others	14.4
Total (n=369)	100.0
Department working at	
Customer service (including reservation)	49.7
Sales	20.9
Marketing	8.8
Strategic planning	8.2
Others	12.4
Total (n=364)	100.0
Working experience (years)	
1-2	32.3
3-5	24.9
6-10	21.0
11-15	7.7
16-20	10.5
21-25	2.5
More than 25	1.1
Total (n=362)	100.0
Experience in servicing disabled customers	
Yes	56.9
No	43.1
Total (n=364)	100.0
Having the disabled family member, relatives, or friends	
Yes	30.7
No	69.3
Total (n=365)	100.0

4.2 Perceptions of employees in tourism industry on the market for tourists with disabilities

Table 3 shows the perceptions of employees in the tourism industry regarding the market for tourists with disabilities. Employees in the Korean tourism industry highly agreed with ideals such as: ‘People with disabilities have the same travel desire as people without disabilities’ (Mean= 4.26), ‘The market sufficiently caters to the desires of tourists with disabilities’ (Mean= 3.98), and ‘The market for tourists with disabilities has different needs and requirements according to individual characteristics such as type of disability, level of disability, usage of assistive instruments’ (Mean= 3.90). On the other hand, respondents showed a low level of agreement on items such as: ‘The market for tourists with disabilities is an unprofitable one’ (Mean= 2.88), ‘The market for tourists with disabilities has a great economic potential’ (Mean= 2.98), ‘The market for tourists with disabilities is a useful alternative to overcome seasonality problems confronted by tourism businesses’ (Mean= 3.10), ‘The size of market for tourists with disabilities is too small for tourism businesses to give considerable attention to’ (Mean= 3.18), and ‘The market for tourists with disabilities is a good business target as well as an alternative to secure competitive edge’ (Mean= 3.24). In conclusion, employees in Korean tourism businesses have a fundamental understanding of travel desires of tourists with disabilities. They also realized that differences exist in terms of travel needs and requirements according to individual situations of tourists with disabilities (i.e., type and/or level of disability) and that tourism opportunities for tourists with disabilities are restricted. Furthermore, individuals involved in the Korean tourism industry generally perceived that the economic potentiality obtained from the market for tourists with disabilities was negligible; however, they regard customers with disabilities as a valuable one to consider.

In the case of the Korean accommodation sector, employees tended to highly agree with the following factors: ‘tourists with disabilities have the same travel desires as tourists without disabilities’ (Mean= 4.25), ‘The needs of tourists with disabilities for tourism are sufficiently fulfilled as it is’ (Mean= 3.98), ‘The market for tourists with disabilities has different needs and requirements according to individual characteristics such as type of disability, level of disability, usage of assistive instruments’ (Mean= 3.82), and ‘Understanding tourists with disabilities is not crucial for those who manage tourism businesses’ (Mean= 3.78). On the other hand, they showed a relatively low level of agreement on such items: ‘The market for tourists with disabilities has a great economic potential’ (Mean= 3.09) and ‘The market for tourists with disabilities is an unprofitable one’ (Mean= 2.84). To summarize these results, employees working for the Korean accommodation sector tended to recognize the rights of tourists with disabilities to travel, their diverse travel related needs and requirements arising from individual characteristics (e.g., type and level of disability). The employees also recognized the importance of travelers with disabilities as a customer. However, employees in the accommodation sector did not recognize opportunities for economic benefit to be accrued from the market for tourists with disabilities.

Employees in the travel agency sector tended to highly agree on such items as: ‘The market for tourists with disabilities has different needs and requirements arising from individual characteristics such as type and level of disability, and/or usage of assistive instruments’ (Mean= 3.99), ‘The needs of tourists with disabilities for tourism are sufficiently fulfilled as it is’ (Mean= 3.97), ‘Understanding tourists with disabilities is not crucial for those who manage tourism businesses’ (Mean= 3.88), ‘Tourists with disabilities tend to be loyal, thus it’s worth considering’ (Mean= 3.70). On the other hand, items such as: ‘The market for tourists with disabilities has a great economic potential’ (Mean= 2.92), ‘The market for tourists with disabilities is an unprofitable one’ (Mean= 2.86), and ‘The market for tourists with disabilities is a useful alternative to overcome seasonality problems confronted by tourism businesses’ (Mean= 3.01) were relatively less agreed upon. Thus, employees in the travel agency sector tended to recognize the rights of the disabled to travel and their diverse travel related needs/requirements according to their disability characteristics (e.g., type and level of disability). Additionally, they also agreed that individuals with disabilities

are important customers. On the other hand, employees in the travel agency sector did not recognize potential economic benefits (e.g., increased revenues and seasonality problem reduction) that could be accrued from serving the market for tourists with disabilities.

Meanwhile, data analysis revealed statistically significant differences in the perception between employees of both sectors. They included several items: ‘Tourists with disabilities are limited in tourism products/service consumption due to their physical/cognitive/sensual impairments,’ ‘Segmenting the market for tourists with disabilities is not necessary as they are homogenous,’ ‘The market for tourists with disabilities has different needs and requirements according to individual characteristics such as type of disability, level of disability, usage of assistive instruments,’ and ‘The market for tourists with disabilities is a useful alternative to overcome seasonality problems confronted by tourism businesses.’ With regards to these items, employees in the accommodation sector perceived the market for tourists with disabilities more accurately than those of the travel agency sector.

Table 3. Perceptions of Employees of Korean Tourism Industry on the Market for tourists with disabilities

	Tourism Industry			Accommodation Sector			Travel Agency Sector		
	N	Mean	S.D	N	Mean	S.D	N	Mean	S.D
Market for TWD has a great economic potential.	366	2.98	.893	160	3.09	.864	154	2.92	.907
TWD are limited in tourism products/service consumption due to their physical/cognitive/sensual impairments. ^a	367	3.13	1.033	160	3.28	.990	155	2.95	1.056
The market for TWD is an unprofitable one.	365	2.88	.946	158	2.84	.996	155	2.86	.919
The market for TWD has a great potential as a niche market.	365	3.39	.979	160	3.37	.994	153	3.45	.980
Segmenting the market for TWD is not necessary as they are homogenous. ^a	363	3.63	1.031	157	3.51	1.060	154	3.75	.994
Tourists with disabilities tend to be loyal, thus it's worth considering accommodating them.	367	3.64	.882	160	3.66	.911	155	3.70	.840
The size of the market for TWD is too small for tourism businesses to give considerable attention to.	366	3.18	.995	160	3.16	1.021	154	3.23	.994
Tourism with disability is an important future market that tourism businesses should pay much attention to due to its expected expansion.	365	3.55	.855	160	3.60	.877	154	3.51	.865
TWD have the same travel desire as the non-disabled.	362	4.26	.935	157	4.25	.903	153	4.23	.980
The market for TWD has different needs and requirements according to individual characteristics such as type of disability, level of disability, usage of assistive instruments. ^a	367	3.90	.753	160	3.82	.800	155	3.99	.664
Understanding customers with disabilities is not crucial for those who manage tourism businesses.	366	3.82	.830	160	3.78	.844	154	3.88	.827

It is challenging for tourism businesses to accommodate TWD as they tend to travel in a group.	367	3.39	.980	160	3.32	.967	155	3.52	.935
The market for TWD is a useful alternative to overcome seasonality problems confronted by tourism businesses. ^a	365	3.10	.913	160	3.21	.912	153	3.01	.862
The market for TWD is an object related to social responsibility of tourism businesses.	363	3.77	.845	157	3.80	.807	154	3.73	.886
The market for TWD itself does not exist.*	363	3.44	1.272	158	3.49	1.266	153	3.41	1.280
The market sufficiently caters to the desires of tourists with disabilities.*	365	3.98	.846	160	3.98	.861	153	3.97	.838
The market for TWD is a good business target as well as an alternative to secure competitive edge.	365	3.24	.882	159	3.28	.954	154	3.22	.850

Note. * Reverse coding

^a statistically significant at $\alpha = .05$ between accommodation sector and travel agency sector

4.3 Readiness states of tourism businesses for the market for tourists with disabilities

In order to identify readiness states of Korean tourism businesses for the market for tourists with disabilities, respondents were asked to express their impression on items identifying the readiness states according to a guiding question regarding 'The Company I work with.' Table 4 reveals the results. As presented in the table, Korean tourism businesses seem to be ill-prepared for the market (i.e., mean scores of most of the readiness states were less than 3.0 on a five-point scale). In particular, aspects such as 'Reflects the level of accessibility for tourists with disabilities to facility/service in the performance indicator of the company' (Mean= 2.15), 'Monitors the level of accessibility of facilities/services for the tourists with disabilities and then promotes it internally and externally' (Mean= 2.23), 'Educates and/or trains employees regularly concerning customer service for tourists with disabilities' (Mean= 2.29), and 'Implements extra policies for the convenience of tourists with disabilities beyond standards or regulations set by disability related laws' (Mean= 2.30) were seldom emphasized. Only one item was above the median score: 'Has facilities for tourists with disabilities (ex: ramp, parking spaces for tourists with disabilities, Braille menus, etc.).' In short, Korean tourism businesses seems to have some facilities accommodating tourists with disabilities and past experiences of serving customers with disabilities; however, they do not act proactively to enhance their accessibility levels with information provision, employee education/training, reflecting accessibility preparedness into business performance evaluation, or voluntary disability related policies.

In the case of the Korean accommodation sector, the current conditions were generally poor and similar to those of the Korean tourism industry. The results revealed that they did not consider aspects such as 'Reflects the level of accessibility for tourists with disabilities to facility/service in the company's performance indicator' (Mean= 2.46), 'Implements extra policies for the convenience of customers with disabilities beyond standards or regulations set by disability related laws' (Mean= 2.57), 'Monitors the level of accessibility of facilities/services for tourists with disabilities and then promotes it internally and externally' (Mean= 2.58), and 'Educates and/or trains employees regularly concerning customer service for tourists with disabilities' (Mean= 2.58). However, factors such as 'Has facilities for tourists with disabilities (ex: ramp, parking spaces for tourists with disabilities, Braille menus, etc.)' (Mean= 3.57) and 'Provides accessibility information on facilities and services (e.g., ramps, disabled parking spaces, Braille menus, etc.) in various formats' (Mean= 3.16) were relatively well-prepared. Hence, it can be said that the Korean

accommodation sector seems to be aware of the existence of customers with disabilities, but they do not proactively pursue travelers with disabilities, therefore, it is essential to initiate change.

In the case of the Korean travel agency sector, the industry seemed to be less prepared in many aspects than the accommodation sector. In particular, factors such as ‘Reflects the level of accessibility for tourists with disabilities to facility/service in performance indicator of the company’ (Mean= 1.85), ‘Monitors the level of accessibility of facilities/services for tourists with disabilities and then promotes it internally and externally’ (Mean= 1.91), ‘Implements extra policies for the convenience of customer with disabilities beyond standards or regulations set by disability related laws’ (Mean= 1.97) and ‘Has a service manual for customers with disabilities’ (Mean= 2.16) were seldom considered by the sector. To summarize, readiness states of the Korean travel agency industry for tourists with disabilities require improvement on a large scale.

A comparison of the two sectors (accommodation and travel agency) in terms of the readiness states for the market for tourists with disabilities revealed that there were statistically significant differences in ten aspects out of twelve and that the accommodation sector is better prepared than the travel agency sector. Components that did not show statistical differences included ‘Checks the existence of impairments and encourages customers with disability to inform their special service needs upon arrival’ and ‘Thinks that the investment on the accessibility improvement of facilities/services/information too costly.’

Table 4. Readiness states of the Korean tourism businesses for the market with tourists with disabilities

The company I work for...	Tourism Industry			Accommodation Sector			Travel Agency Sector		
	N	Mean	S.D	N	Mean	S.D	N	Mean	S.D
Has facilities for TWD (ex: ramp, entrances, rooms, bathrooms, elevators, emergency lights, emergency alarms, parking spaces for disabled, Braille menus, etc.) ^a	366	3.12	1.186	159	3.57	1.628	155	2.65	1.177
Has service manual for TWD ^a	364	2.51	1.032	158	2.87	1.081	155	2.16	.922
Educates and/or trains employees regularly concerning customer service for TWD.	365	2.29	1.050	159	2.58	1.081	154	1.95	.881
Monitors the level of accessibility of facilities/ services for TWD and then promotes it internally and externally ^a	366	2.23	.968	159	2.47	.967	155	1.91	.817
Implements extra policies for the convenience of TWD beyond standards or regulations set by disability related laws ^a	366	2.30	.967	159	2.57	.964	155	1.97	.829
Makes all employees understand different needs, desires, and requirements of segmented the market for TWD ^a	366	2.59	1.021	159	2.77	1.025	155	2.37	1.001
Makes all employees be aware of facility/service/ policy for customers with disabilities in their workplace. ^a	363	2.61	1.031	158	2.84	1.002	153	2.33	.987
Provides appropriate accessibility information about facilities/services with the consideration of various types of disabilities ^a	366	2.69	.996	159	2.92	.958	155	2.39	.963

Reflects the level of accessibility for TWD to 'performance indicator' of facility/service in the company ^a	365	2.15	.944	158	2.46	.914	155	1.85	.854
Checks the existence of impairments and encourages customers with disability to inform their special service needs upon arrival	366	2.79	1.041	159	2.75	.953	155	2.84	1.148
Thinks that the investment on the accessibility improvement of facilities/services/information too costly	361	2.82	1.003	158	2.80	.954	152	2.79	1.059
Provides accessibility information on facilities and services (e.g., ramps, entrances, rooms, bathrooms, elevators, emergency lights, emergency alarms, disabled parking spaces, Braille menus, etc.) in various methods ^a	366	2.89	1.042	159	3.16	1.012	155	2.55	1.007

^a statistically significant at $\alpha = .05$ between accommodation sector and travel agency sector

5. Discussion and Implications

5.1 Discussion

Recently, the market for tourists with disabilities has gained growing attention from both academics and practitioners as a niche market due to the increasing acceptance of the right to travel for people with disabilities. However, tourism environments are not entirely suitable for the market. Accordingly, there is still a gap between reality and ideals. In this sense, the role of the tourism industry in enhancing accessible tourism environments becomes essential as they are the suppliers of tourism products and services. This study aimed to investigate how the employees working in Korean tourism companies perceived the market for tourists with disabilities, what the current state of readiness of the Korean tourism industry is for the market, and whether differences exist in these aspects between two leading tourism industry sectors (i.e., accommodation and travel agency). The major summaries of the results are as follows.

First, based on the findings of the study, the employees working in Korean tourism companies essentially agree that tourists with disabilities have desires and a right to travel that are the same as tourists without disabilities, but generally speaking, their opportunities for travel are restricted. They also recognize that differences exist in terms of travel needs and requirements according to the characteristics of tourists with disabilities (i.e., types and/or levels of disability). However, the employees generally fail to recognize the economic potentiality of the market for tourists with disabilities, even though they regard tourists with disabilities as valuable consumers to consider. These findings support the results of previous studies (Burnett & Baker, 2001; Darcy & Pegg, 2011; Grady & Ohlin, 2009; O'Neill & Knight, 2000; Open Doors, 2002; Ozturk et al. 2008; Rice, 2006; Takeda & Card, 2002). When analyzed separately, these results were found to be similar in both the accommodation sector and the travel agency sector. In addition, no significant differences in perceptions of the market for tourists with disabilities between the sectors existed, except in four aspects (i.e., 'Tourists with disabilities are limited in tourism products/service consumption due to their physical/cognitive/sensual impairments,' 'Segmenting the market for tourists with disabilities is not necessary as they are homogenous,' 'The market for tourists with disabilities has different needs and requirements according to individual characteristics such as type of disability, level of disability, usage of assistive instruments,' and 'The market for tourists with disabilities is a useful alternative to overcome seasonality problems confronted by tourism businesses').

Second, the results indicated that Korean tourism companies are indeed ill-prepared for the market for tourists with disabilities, suggesting there are minimal differences from previous research results (Lipianin-Zontek & Szewczyk, 2019; O'Neill & Knight, 2000; Open Doors, 2002; Ozturk et al. 2008; Rice, 2006). Companies tend to abide by the minimum requirements (e.g., parking lot for the disabled, ramps, etc.) regulated by disability laws. The situation does not differ in both the accommodation sector and the travel agency sector, although the former is slightly better prepared for the market than the latter. Furthermore, statistically significant differences exist in ten factors out of twelve between the two sectors. In general, because the accommodation sector consists of larger facilities, it tends to be more regulated by disability laws, and has increased opportunities to deliver services to customers with disabilities than the travel agency sector; thus, the accommodation sector has come to be more accessible. Interestingly, as proposed by McKercher et al. (2003), the travel agency sector may play the role of an inhibitor rather than a facilitator when it comes to the market for tourists with disabilities.

5.2 Theoretical Implications

The findings of the current study pose several theoretical implications. First, the majority of the literature related to tourists with disabilities was investigated from the demand-side such as examining travel constraints or motivations, as it is essential to understand the motivation and desire of individuals with disabilities while traveling. As studies that examined whether suppliers are ready to accommodate tourists with disabilities are limited, the current study contributed to filling this research gap by focusing on the supply perspective, which will provide information for a better understanding of this topic. Secondly, the market for tourists with disabilities has received growing attention in the field of tourism and hospitality, along with a rise in social justice concerns. However, compared to the extent of research on the travel experience of tourists without disabilities, research on tourists with disabilities remains insufficient. Thus, the current study made considerable contributions to filling this research gap as the findings will create a framework for future research and application of theory to related topics.

5.3 Practical Implications

The current study suggests several practical implications. Recently many countries have enacted laws prohibiting discrimination towards people with disabilities. International conventions have also emphasized encouraging social interaction and leisure for people with disabilities. As a result, social attitudes towards individuals with disabilities, including the right to enjoy culture, leisure, and travel are gradually changing. Moreover, tourism environments have also become increasingly, though not sufficiently, accessible. It is suggested that governments should provide additional financial subsidization for tourists with disabilities to promote and enhance travel opportunities. For instance, the South Korean government provided a "Travel Voucher (equivalent to US \$150)" for tourists with disabilities in the year of 2012. As of 2018, these vouchers have been expanded to be used not only for travel but also in culture, art, and sports. However, the value of these vouchers has decreased to US \$70 per person, further reducing the opportunity for individuals with disabilities to participate in travel and leisure activities. With strengthened government economic support in the future, opportunities for disabled tourists to participate in travel related activities can be expanded.

Furthermore, it is essential for employees working in tourism and hospitality businesses to enhance their perceptions on tourists with disabilities. Currently, employees working in Korean tourism companies do not seem to suitably understand the market for tourists with disabilities. They do not recognize the attainable economic potentiality of the market (e.g., increasing revenue, reducing seasonality problems, and enhancing competitive advantages). As a result, Korean tourism companies, regardless of types of businesses, are not actively trying to dominate the market in advance as few companies are willing to invest money for more facilities and accommodations than

just the minimum standards required by the law. However, this phenomenon may have originated from realities within the tourism industry, that is, major customers of tourism companies are tourists without disabilities. Thus, tourists with disabilities are most likely not mainstream customers. In a personal interview, a manager of an exclusive tourist hotel in a large city in Korea mentioned that “Just with the guests without disabilities, we have almost 100% room occupancy throughout the year. In this situation, who do you think wants to spend money to provide extra facilities/services for a customer with a disability under uncertainty for profits?” This misperception may find its root in the lack of information on the market for tourists with disabilities (e.g., incorrect statistics on the market in terms of size and travel expenditure) and the tendency to disregard the disabled as customers. By increasing experiences of providing services to disabled customers, employees would recognize these economic significances, though initially, means to fully attract tourists with disabilities may consume a small portion of total revenue.

Lastly, stakeholders should promote accessible tourism environments for the market for tourists with disabilities and share benchmarks that exemplify tourism businesses making a significant profit within the tourism industry. At present, the law requires minimum standards to be followed without enacting penalties for failure of compliance. As such, abiding by minimum standards (e.g., some parking lots and two rooms for guests with disabilities, open doors, ramps, and elevators) is considered enough for five-star hotel certification purposes. However, when establishing a travel agency, there are no requirements. In a personal interview, a staff member of a local resort explained, “We just have two parking spaces for guests with disabilities, ramps, and elevators. But there would be no such facilities unless the law requires.” A strong enforcement of the disability laws combined with the carrot (i.e., financial supports for accessibility enhancement) and stick (i.e., financial and administrative penalties) approach is needed to establish an accessible tourism environment.

6. Limitation and Future Research

This research investigated supply-side perspectives of the market for tourists with disabilities in South Korea. Implications discussed are expected to contribute to enhancing the travel rights of individuals with disabilities. Items measuring each concept of the research will also guide future research considering similar issues. Although the generalization of the results was not a concern, certain limitations should be recognized. For instance, convenience sampling was utilized and not all areas of the tourism industry were included in the sample. More rigorous systematic sampling methods may be required in the future. Additionally, Korean tourism companies’ state of readiness for the market for tourists with disabilities was measured subjectively (i.e., based on impression of the employees working in tourism companies), but their impressions may not correlate with the objective reality. In the future, an objective measure (e.g., a checklist) should be developed for a more accurate measurement regarding tourism businesses’ state of readiness.

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