

ACCESSIBILITY IN TOURISM - NEED AND OPPORTUNITY FOR THE TOURISM MARKET

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Abstract.

The paper aims at raising the awareness of the actors responsible for the development of tourism on the emergence of new segments of tourism consumers generated by the elderly and those with temporary capacities or permanently restricted as direct beneficiaries of accessibility. The paper is based on the definition of accessibility in tourism starting from the trends of the tourism market from a socio-demographic perspective, on the presentation of the implications of the aging process on the structure of tourism market demand, on describing the experiences and the initiative for supporting accessible tourism. Accessibility must be approached as a parameter of the quality and functionality of the tourism supply components, but also as part of responsible and sustainable tourism policy and strategy. The accessible tourism market in Europe is estimated at about 27% of the total population and about 12% of the tourist market. According to world health statistics, the proportion of tourists in the senior category will account for 22% of the world's population in 2050 plus the population with disabilities and families with young children. Developing travel opportunities for people with disabilities provides a fundamental human right, but it is also an exceptional opportunity to develop business.

Keywords: accessibility, affordable tourism, tourism for all, inclusive tourism, senior tourism, accessible tourism market

JEL Classification: D63,J14,M19,M38

1. Introduction

Tourism is the world economy sector that contributes with 10% to world GDP, holds 7% of world trade and one in 10 jobs is related to tourism. Given this performance, we can say that the tourism sector has the responsibility related to sustainable development. Tourism activity in its complexity gained over time, has both economic, cultural and social dimensions. The Manila Declaration of 1980 specified the terms „tourism” and „accessibility” that were later developed by the World Tourism Organization and recognized tourism as a fundamental right and a key instrument for human development. Economically, tourism synthesizes the outputs of a significant number of activities, and on a psychosocial level it constitutes a superior way of organizing leisure, even talking about a free time market. By its specific nature, tourism can contribute substantially to identifying and solving many problems related to the challenges of the current world, to building a more responsible and sustainable economic and social climate. In the context of the new agenda agreed in 2015 by world tourism leaders under the name of *Transforming our world: the 2030 Agenda for Sustainable Development*, tourism has the task of fulfilling the following objectives:

- raising the awareness of all stakeholders on the contribution of tourism to development so that it becomes a catalyst for positive changes,
- promoting policies and business practices that favorably influence the consumption behavior of all potential tourism consumers.

UNWTO declared 2017 as the International Year of Sustainable Development for Tourism as a clear recognition of tourism's contribution to the implementation of the development agenda and the awareness of the potential of the tourism sector in ensuring economic growth, social inclusion and preserving the environment and culture.

According to OMT, in 2020, the tourist market trends and the socio-demographic characteristics of tourists will be (Alén, E.& al., 2012, p.140):

- the increase in the number of elderly tourists and a significant increase in the segment of tourists over 55 years;

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- switching from active holidays to holidays based on experience with longer itineraries that are managed in many cases individually;
- the increasingly complex segmentation of demand that is geared towards goals and objectives that are different from traditional travel;
- reducing the average household size in the EU to about 2.4 members;
- changing the behavioral habits of tourism consumption in the sense of increasing the share of travellers with a higher education and employment income and who travel during holidays, Easter, Christmas and weekends for recreation, then for visits to relatives and friends, and for business and studies. The length of stay has decreased for young tourists, while for adults over 40 years it has increased;
- there is a tendency to allocate tourism more periods during one year with shorter holidays;
- a combination of travel and work periods is increasingly practiced;
- looking for tourist products that offer more experiences in a short period of time.

2. Accessibility in tourism, concept and history

The concept of accessibility is used in both the social and architectural sense. In the social sense, accessibility refers to the possibility that a product, service, information can be used by any person. Architecturally, accessibility expresses the capacity of civil engineering to meet the needs of all categories of users, including people with disabilities or in need for assistance. Accessibility is considered the central element of any responsible and sustainable tourism policy (Bordeianu, 2015). In a new challenge and advertising there are built increased demands on accommodation, restoration, recreation or wellness. It is a social responsibility but also a factor for increasing the competitiveness of tourism as it makes it possible to expand the tourism market by meeting the needs of new demand categories that are on the rise. This is the third-age population (the upward trend of population aging), but also about 650 million people with disabilities worldwide.

Accessibility should be understood as the need to meet the expectations of any potential consumer of tourism regardless of individual characteristics, but are not limited to people with disabilities. Accessibility is related to the possibility of people, whether or not they have a deficiency, to have unobstructed access to the entire environment without spatial and temporal barriers, especially architectural and physical ones. It is used as a term to create a positive image within the community of people with disabilities.

Affordable tourism was initially conceived as an activity that includes a set of facilities for access to infrastructure for people with physical, mental and sensory disabilities. It is appreciated in the literature as the variety of leisure activities dedicated to tourism by people with limited capacities, which allow them to integrate functional and psychological perspectives in order to achieve individual satisfaction and social development. In the author's view, accessible tourism is synonymous with integration.

Affordable tourism involves all those activities through which people, regardless of their status, can enjoy the tourist experiences. Interaction of people with the tourist environment is influenced by meeting the access needs of the elderly, the less mobile or the disabled. The fundamental reference framework for the development of sustainable and responsible tourism is the Global Code of Ethics for Tourism. Article 7 of this Code provides that direct and personal access to the discovery and enjoyment offered by the planet's resources constitutes a right of all the inhabitants of the planet.

A comprehensive definition of accessible tourism is given by Buhalis and Darcy "Accessible tourism is a form of tourism that involves collaborative processes between stakeholders that enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments.

This definition adopts a whole of life approach where people through their lifespan benefit from accessible tourism provision. These include people with permanent and temporary disabilities, seniors, obese, families with young children and those working in safer and more socially sustainably designed environments” (Buhalis and Darcy, 2011, pp. 10-11).

At the end of 1980, a term was introduced with reference to tourism for people with small capacities, namely *tourism for all*, defined as a set of activities oriented to tourism and agreement that are carried out in the free time by an individual and to which all people can have access regardless of their degree of ability / disability, as a full integration and as a social and individual fulfillment of user interaction with the environment. (Fernandez and Villaran, 2007, p 49).

The term *accessible tourism* originated for the first time in 1989 on the occasion of the International Year of Persons with Disabilities. In Europe, this concept has spread rapidly, followed by a number of changes in legislation that have led to development priorities and the perception of accessibility in the tourism sector. Accessible tourism as a concept is presented under several names like: tourism for all, inclusive tourism, universal tourism, barrierfree tourism (Bordeianu, 2015). In 2009, the European Commission launched the Calypso 27 project on achieving social tourism objectives, arguing that ensuring accessibility for disabled people to tourism will contribute to the key objectives of the Lisbon Strategy for economic growth and jobs. The aim of the project was to correct social inequities and universal access to holidays as well as to generate economic activity and economic growth in Europe, combat seasonality in tourism, create new jobs, strengthen the link between European citizens (Alén & al., 2012). This concept was again brought to the attention of actors responsible for global tourism development in 2016 through the theme of the World Tourism Day ”Tourism for all-promoting universal accesibility” who tried to raise awareness among decision-makers about the tourism industry for all, a tourism that would benefit all individuals regardless of their individual capabilities.

Accessible tourism has been the subject of several academic studies, the literature being focused on the definition of terminology (Darcy, 1998; Aitchison, 2003; Buhalis et al., 2005; Darcy and Buhalis, 2011; the ATP4SME Project Partnership, 2014), on analysis of the theoretical approaches (Darcy, 1998; Buhalis et al., 2008b), on highlighting the problems faced by tourists - people with disabilities (Brouillette et al., 1995). All of these studies have started from the analysis of demography at European and world level, from the identification of the population aging phenomenon and new segments of tourism consumers who have accessibility needs and are poorly accommodated by the tourism industry. There are authors who consider (Buhalis, Darcy, Ambrose, 2012) that the development of affordable tourism for all is a rational response to a predictable demographic trend and a massive economic opportunity for the tourism sector.

3. Implications of the aging process on the structure of the tourist market

The population structure of each country plays an important role in the process of substantiating the development strategies, economic and social policies. Nedelea and State (2008) believe that changing the demographic structure of the population will lead to a change in the markets. Growing life expectancy, declining birth rates and purchasing behavior of the baby boomer generation will influence the range of products and services required. Demographic change influences consumer behavior, actors in the national, European and global tourism market, tourism development strategy and implicitly the structure of tourism products. These products must meet the identified needs of aging consumer segments that have specific biological, psychological, social and economic characteristics, but with a rich tourist consumption experience, with a demand for more personalized tourism products.

Worldwide, according to United Nations data, the proportion of the elderly will increase faster than the weight of any other age segment. A study published in 2016 by the National Council of Elderly People notes that in 2020, worldwide, the number of the elderly will reach 0.6 billion and will steadily increase in 2100 to 2.3 billion. At EU level, in 2020 the number of elderly people will reach 103.4 million, and by 2100 it will reach 139 million.

A study carried out in 2014 by the European Commission DG Enterprise and Industry mentioned the following key aspects of accessible tourism (p.6-7):

- starting with 2011, in the EU there were 138.6 million people with access needs, of which 35.9% were disabled people aged between 15-64 and 64.1% were 65-year-olds or more;
- Great Britain, France, Germany, Italy and Spain are the European countries with the highest number of people with access needs, all with over 10 million;
- In 2012, more than half of people with disabilities in the EU travelled, and most travels were mainly done in their home country;
- The direct gross turnover of the EU's affordable tourism in 2012 was about EUR 352 billion, or EUR 786 billion if the multiplier effect is taken into account;
- The direct gross added value of the EU's affordable tourism in 2012 was about EUR 150 billion, and after considering the multiplier effect, the total gross value added contribution was approx. EUR 356 billion;
- The contribution of affordable tourism to the EU in 2012 was about 4.2 million people, and considering the multiplier effect, the total employment was about 8.7 million people;
- A study conducted by James Bowtell in 2015 (p.203-204) on the accessible tourism market in Europe has highlighted that tourism demand for accessible tourism in Europe will increase from 120 million people in 2005, meaning about 27% of the population European Union, to approximately 160 million people in 2025. Approximately 70% of the demand for accessible tourism has physical and financial capacities to travel, and accessible tourism will generate potential revenue of EUR 88.6 billion in 2025, representing a 65% increase over 2005 when the last paper of this type of research was published. Due to the aging of the baby boomer generation and the deterioration in health, an increase in the share of people with disabilities is expected, but for this growth there is a very small percentage of the market that responds to the needs of accessible tourism.

The structure of the European population by age group by 2015 and the projections for 2020 and 2060 is as outlined in table no.1

Table no 1. The structure of the European population by age group

Country/ Region	2015			2020			2060		
	0-14 years old	15-64 years old	65 years old and over	0-14 years old	15-64 years old	65 years old and over	0-14 years old	15-64 years old	65 years old and over
East Europe	15,0	68,3	16,7	15,6	66,2	18,2	15,7	55,1	29,2
North Europe	17,6	64,3	18,1	17,7	63,3	19,0	17,2	57,5	25,3
South Europe	14,3	64,2	18,8	14,5	64,5	21,0	14,6	53,9	31,5
West Europe	15,6	64,6	19,9	15,5	63,1	21,4	16,6	56,0	27,4
EU-27	15,5	65,3	19,2	15,7	64,1	20,2	16,0	55,7	28,3

Source: UN databases for 2011-2100, http://esaunorg/unpd/wpp/excel-Data/DB04_Population_ByAgeSex_Annual/wpp2010_db4_f1b_population_by_age_both_sexes_annual_2011-2100.xls in Population aging in European context and in Romania-perspectives

At the level of Romania, the number and structure of the population are presented as in the below table (tabel no 2):

Tabel no. 2. The number and structure of the population at the level of Romania

Age group	2015		2025		2050	
TOTAL	21.675,8	100,0	19.898,0	100,0	16.083,5	100,0
0-14 years old	3.816,4	17,6	2.589,6	13,0	1.615,9	10,0
14-64 years old	14.804,8	68,3	13.515,7	67,9	9.401,7	58,5
65 years old and over	3.054,6	14,1	3.792,7	19,1	5.065,9	31,5

Source: *National Council of Elderly People-Population aging in European context and in Romania-perspectives*, July 2016, p.13; Tempo databases of the National Institute of Statistics, "Designing the population of Romania by averages, by 2025", National Institute of Statistics, 2005 and "Designing the population of Romania by development region, horizon 2050", National Institute of Statistics, 2009;

The growing number of older citizens within the European Union and around the world can be characterized as a major challenge for the tourism industry. The increase in the number of seniors determines the need to identify patterns of tourism consumption and the creation of those types of personalized tourist arrangements, which are modular by considering leisure variables, tourism consumption experience, safe income. The quality of service and accessibility could be considered the major requirements of this segment of consumers located in full digital growth. The potential for tourism for seniors is increasing due to increased life expectancy, improved health, increased comfort in the tourism product structure due to modern technologies used in travel and new organizational systems applied in tourism. Currently, a large part of the tourist market segment of elderly citizens have financial resources, but also consumption habits of tourist products acquired over time. In addition, traveling is seen by this segment of consumers as a way for older people to participate in social life and maintain a proper physical and mental status.

4. Experience and initiatives to support affordable tourism

Affordable tourism has been examined in recent years from the perspective of increasing the tourist destination's competitiveness as a factor that can contribute to better valorisation of the tourist destination by addressing to a growing market segment. Tourism destination management can highlight the accessible tourism concept as a tool to increase tourist value by attracting new consumer segments.

In order to turn tourist destinations into accessible destinations, in recent years, UNWTO has been a UN specialized agency working in the field of world tourism promoting sustainable responsible tourism, the universality and accessibility of tourism, together with organizations of people with disabilities, civil society, governments and representatives of the tourism industry have developed a number of specific actions. From the cooperation with ENAT - European Network for Accessible Tourism and the Spanish ONCE Foundation resulted in recommendations and technical manuals. An example is Module V: Best Practices in Accesible Tourism of the Manual on Accesible Tourism for All: Priciples, Tools and Best Practices. This brochure presents six case studies illustrating key elements of the accessible tourism chain, with examples of good practices on cultural tourism, the use of new technologies to make accessible the art of visitors with visual impairments, the inclusion of groups of visitors with reduced mobility and learning difficulties in natural, outdoor environments, guiding visitors with intellectual disabilities or learning difficulties on cultural heritage sites.

ENAT - European Network for Accessible Tourism present in more than 30 countries and 5 continents, launched in 2009 the Code of Good Conduct as a commitment and certification scheme for tourism organizations that recognize and promote affordable tourism.

Within ENAT there are also three members from Romania, namely: Motivation Foundation Romania, RDA - Regional Development Agency and Sano Touring, tour operator.

From 2013, Motivation Foundation Romania is certified to provide training courses for the wheelchair delivery technicians, based on standards and course materials developed by the World Health Organization (WHO). From 2014, the foundation organizes in Romania courses for specialists on the implementation of the International Classification of Functioning, Disability and Health, in order to offer services centered on the abilities of each person. In 2012 it launched the first national map of accessible places where public institutions, places of entertainment, leisure, accommodation and facilities and their surroundings can be found. The Accessibility Map is an online platform that includes information about buildings in the fields of culture, entertainment, health, sports, tourism and services of general interest. The map is available at www.accesibil.org and is intended for people with locomotor disabilities. It can also be used by those economic agents in tourism that aim to develop tourist arrangements for people with motor disabilities. Another initiative of the Motivation Foundation Romania is related to its quality of access provider expertise and refers to the assessment of the accessibility of buildings based on Romanian legislation, the Law 448/2006 on persons with disabilities and their free access to the public space, as well as the building norm on the accessibility of public spaces (NP 051-2001). Buildings that meet the criteria of accessibility for wheelchair users receive Brand Accessibility based on evaluation of access to outer space, access to the interior and facilities available. The Accessibility Mark is registered with the State Office for Inventions and Trademarks. Among the few tourist and hospitality service providers that meet the accessibility criteria are Băile Felix Complex and the Royal Court of Piatra Neamț.

The Regional Development Agency has as a declared mission the contribution to the sustainable and equitable development of the Region by removing the disparities and imbalances between the development regions for the benefit of their inhabitants.

Sano Touring is the only national tourism agency that promotes Romania as an accessible tourist destination. As a tour operator, Sano Touring has created a wide variety of travel products for seniors and wheelchair users. The destinations promoted on www.accessibleromania.com are included in the offer of Sano Touring which is authorized to market tourist services according to the Romanian legislation in force. Among the outstanding results achieved in Romania in the field of accessible tourism is the 2013 project titled *The European Excellence Award for Available Travel*.

5. Barriers to the development of accessible tourism services

Bindu and Kiruthika (2016, p.2-3), present points of view from the research undertaken in the field of accessible tourism. Thus, according to Smith (1987) there are three main types of barriers and obstacles to the consumption of tourist products by people with disabilities, respectively: environmental barriers (including factors of attitude, architecture and ecology), interactive barriers (communication) and intrinsic barriers (related to their own individual, psychological or cognitive functioning).

In 1991, Crawford et al made a model in which they rank the constraints that influence the participation or non-participation of people with disabilities in leisure activities, intrapersonal constraints, followed by interpersonal constraints, and finally, structural constraints. Turco et al (1998) identified the constraints for people with disabilities by considering the major aspects of tourism consumption and barriers related to attractions, information, inaccessibility of airplane toilets and accommodation.

McKercher et al (2003) have identified a number of exogenous obstacles that can inhibit travel or reduce satisfaction:

- architectural barriers: stairs, inaccessible toilets, inaccessible accommodation of the hotel etc.;

- ecological barriers: irregular runways, tree roots and other external obstacles;
- transport barriers, especially local transport including cars, buses and taxis;
- legal barriers where rules or regulations prohibit disabled people from bringing with them the necessary equipment;
- communication difficulties, both at home and at destination;
- barriers of attitude due to negative attitudes from service providers;
- information barriers due to the inaccuracy of site accessibility data. It is necessary the information on accessibility to places of tourist attraction, as well as accessibility to reception units, means of transport as well as the availability of assistance and the presence of travel partners.

Within 1st UNWTO European Conference on Accessible Tourism 2014 organised at San Marino there were presented ***the barriers that hinder the development of services related to accessible tourism***, namely: lack of knowledge and skills in issues related to the requirements of people with disabilities; lack of accessibility standards; the need for large investments and / or additional costs; marketing barriers and problems in attracting tourists with accessibility needs; lack of funding; negative attitudes of staff or other clients; legal requirements; accessibility requirements are too complex to implement; training staff on accessibility issues; lack of time. Among the needs of providing services related to accessible tourism are mentioned in the same study as follows: Customer demand; Social responsibility; Business benefits - increased profits; Requirements from business partners; Demands from DMOs; Corporate policy; Legal requirements.

The main categories of needs that tourism stakeholders should specifically address are: wheelchair needs or those who have difficulty traveling, technical equipment related to sensory disabilities; communication needs accessible to people with intellectual disabilities. Infrastructure is a major barrier to meeting the needs of all categories of tourists. Its existence and quality is a competitive advantage / disadvantage and a strategic factor for the development of other sectors of the economy, of tourism regions with potential.

6. Conclusions

Tourism is an activity with a strategic role in sustainable development, but it must consider the important changes resulting from the evolution of the demand structure. The aging process, the dynamics of economic and social development create opportunities for tourism. New consumer segments are emerging with features that support tourism development. An important segment of the tourist market determined by the aging process, by the improvement of the economic condition and the health conditions of the group is the *senior tourism segment*. This segment is characterized by the fact that it has a tourist consumption experience, the possibility of requesting tourist products by valorising the accumulated tourist consumption experience, the possibility to consume tourism outside the peak season considering the availability of free time and approaching 20% of the world's population. This segment joins other potential consumer segments of accessible tourism, ie people with disabilities with whom elderly citizens share common needs as people with temporarily restricted capacities such as pregnant women, families with children. The term senior tourism (Hossain, Bailey and Lubulwa, 2003, p.4) is used to designate people aged 55 and over who consume tourism alongside "non seniors", who fall within the age of 15-55 years. The same authors divide the senior segment into two subgroups, namely "younger seniors" between 55-64 and "older seniors" aged 65 and over.

Another segment of the current and prospective tourism market is that of social tourism. *Social tourism* was created with the aim of making travel tourism available to a large segment of the population. Most authors agree that it is a way of promoting fun and cohabitation among these disadvantaged groups (Fernandez and Villaran, 2007, p 50). This idea is based on providing resources for groups with limited resources, elderly, young people or people

with different abilities to allow them to travel in the right conditions in terms of price, accessibility, safety and comfort.

Quality tourism, a new segment of the tourism market, considers the definition of quality as the set of characteristics inherent in a product or service that enables it to be valued the same, better or worse than others. Respecting the needs and expectations of consumers of products / services is the key to quality that should not be perceived as a luxury or privilege but as a differentiation and positioning tool.

Affordable tourism focuses mainly on inclusive tourism or on tourism for everyone. It requires the removal of constraints on access (transport), accommodation and tourist attractions, constraints that prevent disabled people and reduced mobility from enjoying travel experiences. Removing these constraints constitutes opportunities for business development for all categories of tourism stakeholders.

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