

ABSTRACT

Inaugural Dissertation for the Degree of Doctor of Philosophy (PhD)

Speciality 6D090200 - Tourism

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Topic "Development of the forms and methods of excursion service in the Republic of Kazakhstan"

The relevance of the research topic. Kazakhstan is a young republic with a rich history and distinctive culture, which is becoming more and more attractive for subjects of inbound and domestic tourism. Having a wide range of tourist attractions, our country is able to receive travelers from all over the world, to be the center of sports, business, health and, first of all, the center of ethno-cultural tourism.

Leader of the Nation, N.A. Nazarbayev, considering the development of tourism in Kazakhstan as one of the key missions of the state, notes that "inbound and outbound cultural tourism should be based on this symbolic heritage of the people. In terms of the cultural significance, for example, Turkestan or Altai have not just national or continental significance - but iconic status."

Kassym-Jomart Tokayev, President of the Republic of Kazakhstan, in his address to the people of Kazakhstan, emphasizes that "Special attention should be paid to the development of... eco - and ethno-tourism, as an essential area of the economy. The 750th anniversary of the Golden Horde should be celebrated in terms of attracting the attention of tourists to our history, culture, and nature. For the development of tourism, it is important to ensure the construction of the necessary infrastructure, roads in the first place, as well as to train qualified specialists."

Thus, the specified vector of development entails the need to develop all types of tourism, improvement of excursion service, training highly qualified guides, development of the quality of services provided. All the above-mentioned is impossible without modernizing the methods of excursion service, which is becoming especially significant at the current stage of development of the Republic of Kazakhstan, since one of the priorities of the state is the development of domestic and inbound tourism. A large number of natural, archaeological, and architectural monuments of history and culture form a powerful foundation for the development of the entire tourism industry. In accordance with the program of the Government of the Republic of Kazakhstan on the development of the tourism industry for 2019-2025, the provisions of Looking into the Future: Spiritual Revival article of the First President of the republic and in line with the Ruhani Zhangyru Program, the Seven Facets of the Great Steppe and Sacred Geography of Kazakhstan, a cornerstone in the formation of the national unity, peace and harmony of Kazakhstan is to promote the cultural and historical traditions of the country, at both the national and international level.

But having resources is not enough; it is significant to know how to present them, namely, to "teach" the tourist to see the history of the whole country, embodied in the objects of display. This raises the issue of high-quality and effective excursion service, namely, the preparation and control of the work of guides in accordance with international standards. A tour guide is an intercultural conductor, an envoy of his

country, diplomat, historian, linguist, local historian, and geographer in one person, and how tourists around the world "see" Kazakhstan depends on his qualification.

Being experts in their national culture and history, tour guides have a unique opportunity to introduce tourists to the true values of their country and its culture, contributing to the development of intercultural understanding and the strengthening of peace.

Today, Kazakhstan's tour guides have the opportunity to share experiences with guides around the world, and international organizations such as the United Nations World Tourism Organization (UNWTO), a leading international tourism organization that promotes tourism as a driver of economic growth, inclusive development, and environmental sustainability, and offers guidance and support to the sector in promoting knowledge and tourism policies around the world. WFTGA (World Federation of Tourist Guide Associations) is an organization with the key purpose to exchange professional experiences with tour guides around the world. The main goal of the WFTGA is to recognize tourist guides as envoys of a region or an entire country, whose main task is to promote the tourist brand.

Therefore, the excursion service becomes an object of close study and monitoring, because once developed, the work algorithm of the guide will create a basis that will become mandatory for everyone, and allow for close control over the work of each certified guide. Our research will undoubtedly become the basis for the formation of a unified methodology of excursion service, developed on the basis of international and Kazakh experience with the introduction of new technologies.

Excursion service is clearly regulated elements that interact with each other and form a unified system, the work of which directly depends on the quality of each element. Scientists, tour guides, and tourism industry workers give their own interpretations of this term, putting different components into its basis, which together determine the functions of the excursion service.

The topic coverage. Having analyzed the scientific and methodological, educational and methodological, specialized literature and materials of dissertations, it became possible to identify issues related to the process of improving the forms and methods of excursion services in the Republic of Kazakhstan, as an interdisciplinary direction in modern excursion studies.

The key principles of the dissertation research are formed on the basis of doctoral and candidate works of scientists of the CIS countries and Kazakhstan in the field of excursion business, such as: O.G. Lyuterovich, O.A. Brel, I.V. Zorin, D.V. Artsybashev, S.A. Domorat, Yu.S. Putrik, I.V. Bashkatova, S.Ye. Chizhova, A.A. Ryabtsev, I.M. Moroz, and others.

The issues of the theoretical and methodological foundations of the organization of excursion and tourist activities were considered in the works of the following scientists: N.A. Heinicke, B.Ye. Raikov, B.V. Yemelyanov, V.A. Kvartalnov and V.S. Senin, K.V. Kulaev, G.P. Dolzhenko, G.F. Yagofarov, Z.M. Gorbyleva, and N.V. Savina, N.A. Getsevich, V.V. Dvornichenko, R.A. Dyakova, T.A. Maslyukov, V.V. Polovtsev, Ye.N. Rafienko, A.I. Fedina, V.A. Herd, I.V. Zorin and V.A. Kvartalnov, L.M. Loginov and Yu.V. Rukhlov, and others.

The principles of professional training of personnel for excursion services are formed in the scientific works of the following excursion scientists: G.N. Boch, B.Ye. Raikov, M.N. Sokolov, G.G. Tumin, I.M. Grevs, E. Charlemagne, B.M. Yemelyanov, Z.M. Gorbyleva, and N.V. Savina, O.G. Lyuterovich and A.A. Saipov, and others.

The types and forms of the traditional and innovative approach to excursion service in various thematic areas have been studied and presented in the works of the following authors: N.A. Heinicke, B.Ye. Raikov, B.V. Yemelyanov, A.F. Rodinov and Yu.Ye. Sokolovsky, M.Yu. Bondarenko, N.V. Savina, F.P. Kurlat and Yu.Ye. Sokolovsky, Yu.N. Alexandrov, N.P. Antsiferov, A.V. Bakushinsky, N.S. Zuzykina, N.I. Zlatsen, M.A. Kazarina and F.L. Kurlat, and others.

However, the analysis of materials research of scholars, practitioners, case study of universities, international and regional training courses, guides, practitioners excursions also shows that there are a number of unresolved issues related to the study of the processes of improvement of the services, standardization, and regulation of tour activities and development of innovative methods of organizing and conducting tours, applying new technologies, etc.

Therefore, many controversial and problematic issues remain, which has led to the current **contradictions** between:

- traditional approach to the excursion business and international standards for organizing and conducting excursions;
- the need for professional guides who prepare and provide high-quality excursion service and the lack of a single standard for their training and professional activities;
- the need to develop excursion service and the lack of mandatory professional standards and a unified register of guides;
- a classic and innovative approach to the methods and forms of organizing excursions and the process of conducting them.

Based on the above, **the topic of the dissertation research** was defined: "Development of the forms and methods of excursion service in the Republic of Kazakhstan".

The research target: modern excursion service.

The research subject: methods and forms of excursion service in Kazakhstan.

The research hypothesis: If we improve the system of excursion service of the Republic of Kazakhstan by means of using the successful international experience of excursion business, it will undoubtedly affect the quality of excursion service in Kazakhstan, and lead to the development of domestic and inbound tourism in the country, which is one of the priorities of the modern economy of the Republic of Kazakhstan.

In connection with the above, **the purpose of the research** is to improve the forms and methods of excursion service in the Republic of Kazakhstan by means of developing innovative methods and modern excursion products.

Research tasks:

1. To clarify the concept, essence, and transformation of the term "excursion service", revealing its specific forms and methods of its organization in modern excursion activities.

2. To conduct a retrospective analysis of the development of the excursion business in the territory of the Republic of Kazakhstan.

3. To analyze the standards of the professional activity of tour guides and the process of training and advanced training of tour service specialists in the Republic of Kazakhstan.

4. To form and justify the application of a systematic competence-oriented and interdisciplinary approach to the training of excursion service specialists under the Tourism educational program in the Republic of Kazakhstan.

5. To develop and experimentally introduce innovative methods and forms of excursion service in the practical activities of tour guides in Kazakhstan.

6. To determine and implement the methodology of certification of tourist and excursion places of interest by conducting an inventory of attractions in Almaty and the Almaty region.

The methodological and theoretical basis of the research is the concept of organization of excursion business; implementation of forms and methods of excursion service; training, retraining, and advanced training of specialists of excursion service; traditional and innovative methods in excursion studies. The results of research and professional activity formed in the works of specialists of the tourism industry are applied in the present work. (N.A.Heinicke, B.Ye. Raikov, B.V. Yemelyanov, G.P. Dolzhenko, G.F. Yagofarov, O.G. Lyuterovich, O.B. Mazbayev, A.A. Saipov, B.Sh. Abdymanapov, I.V. Ivleva, and others). The conceptual base of the dissertation work is Elbasy N.A. Nazarbayev's and the President of the Republic of Kazakhstan K.K. Tokayev's addresses to the people of Kazakhstan, concepts, and laws of the Republic of Kazakhstan: The Law on Tourism of the Republic of Kazakhstan; The Law of the Republic of Kazakhstan "On Education"; the State Program for the Development of the Tourism Industry of the Republic of Kazakhstan for 2019-2025, Professional Standards in the Field of Tourism, and others.

The research sources: State mandatory standards of the excursion and tourist industry, periodicals and research publications of the Republic of Kazakhstan, countries of the near and far abroad, Internet resources, textbooks, materials of international scientific and practical conferences, scientific and methodological literature, as well as works of scientists in the field of tourism and excursion business, documents of United Nations World Tourism Organization and World Federation of Tourist Guide Associations in the field of organization of excursion service, as well as standards of tourist and excursion service of the Republic of Kazakhstan.

The following **research methods** were used to test the hypothesis and stated tasks:

- **theoretical methods:** analysis of scientific and methodological, educational and methodological, specialized literature and materials of dissertations on the research issue; study of educational programs and textbooks, educational activities of students and trainees of guide courses at the international (WFTGA) and regional

levels, as well as regulatory and legislative documentation of the Republic of Kazakhstan in the field of tourism and education;

- **empirical methods:** sociological survey, observation over the educational process at the university, study, and generalization of professional experience, organization of research, consultations with students and professional guides, heads of tourist enterprises, experiment, analytical processing of results study, and generalization of pedagogical and professional experience, the study of creative and experimental works of students, undergraduates, local historians, and guides.

The scientific novelty of the research:

- the concept, essence, and transformations of the term "excursion service" clarified; its specific forms and methods in modern excursion activity revealed;

- a retrospective analysis of the development of excursion business in the territory of the Republic of Kazakhstan carried out;

- the standards of the professional activity of tour guides and the process of training and advanced training of tour service specialists in the Republic of Kazakhstan analyzed;

- the effectiveness of applying a systematic competence-oriented and interdisciplinary approach to the training of excursion service specialists experimentally confirmed by means of innovative programs, and educational materials for the Tourism educational program;

- innovative methods and forms of excursion service for the first time developed and introduced into the practical activities of tour guides in Kazakhstan, such as the Official Audio Guide of Almaty, interactive guided quest-excursions, and QR-coding of excursion routes in Almaty.

- the uniquely designed methodology of certification of the places of tourist interest firstly developed and put into practice; basing on the methodology an inventory of Almaty (200 passports of objects) and Almaty region (150 passports of objects) made.

- the recommendations for improving the forms and methods of providing excursion service, training, and professional activities of guides of the Republic of Kazakhstan developed;

The main provisions submitted for defense are the following:

- the essence of the concept of "excursion service" and its specific forms and methods in modern excursion activities;

- formation of a systematic competence-oriented and interdisciplinary approach to the training of tour guides in the context of higher education by means of innovative programs and educational materials for the Tourism educational program;

- innovative methods and forms of excursion service integrated into the practical activities of tour guides in Kazakhstan, such as the Official Audio Guide of Almaty, interactive guided quest-excursions, and QR-coding of excursion routes in Almaty.

- the uniquely designed methodology of certification of the places of tourist interest; basing on the methodology an inventory of Almaty (200 passports of objects) and Almaty region (150 passports of objects) made.

- the recommendations for improving the forms and methods of providing excursion service, training, and professional activities of guides of the Republic of Kazakhstan;

The theoretical and practical significance of the research is as follows:

In the course of research activities, unique materials have been developed that can have a qualitative impact on the development of the process of training and professional activity of tour guides, namely:

- Tourist-Toponymic Dictionary of Almaty Region in three languages (Kazakh, Russian, English) and Fundamentals of Tourism and Local History Work textbooks developed and implemented in the educational process;

- the content of the Official Audio Guide of Almaty prepared and implemented (about 200 objects) on the platform IZI.TRAVEL;

- the uniquely designed methodology of certification of the places of tourist interest formed; basing on the methodology an inventory of Almaty (200 passports of objects) and Almaty region (150 passports of objects) made.

- 200 Excursion Objects of Almaty and 150 Excursion Objects of Almaty Region textbooks developed and implemented;

- the uniquely designed methodology developed, on the basis of which quest-excursions in Almaty and excursions with the use of QR codes for the subjects of the tourist market and for educational institutions prepared and conducted;

- the results of the research will become the basis for the formation of a unified standardized methodology for organizing excursion service in the Republic of Kazakhstan;

- the research materials will help the school, college, and university students, specialists tourist profile guides in the preparation and practice of the organization of excursion service, also can have a positive impact on improving the efficiency of sightseeing and tourist and local history work in the field of basic and supplementary education, tourism and hospitality, government and tourism.

The research was conducted in the following stages **from 2016 to 2021**:

At the first stage (2016-2017): The current state of excursion service at the international and regional level analyzed. Priority directions for Kazakhstan in the development of the system of training and professional activity of tour guides identified. The content for the implementation of the Official Audio Guide of Almaty on the platform IZI.TRAVEL, excursions with the use of QR codes, which is an innovative direction in the organization of excursion service in the Republic of Kazakhstan developed.

At the second stage (2017-2018): A detailed analysis of the international systems of guide training, as a fundamental element in the professional activity of a highly qualified guide carried out. Based on data received upgraded system guide training in the Kazakh Academy of Sports and Tourism in the context of Tourism educational program, International Tourism: the Tourism Industry and Business educational trajectory, as well as existing in 1999, the course guides at KTA and KazAST.

At the third stage (2018-2019): Passport of the Excursion Object standard developed, on the basis of which the certification and inventory of 350 objects of tourist interest of Almaty and the Almaty region carried out. The result of this work was the necessary educational and methodological materials in the professional activity of tour guides, which can improve the quality of modern excursion service in Kazakhstan.

At the fourth stage (2019-2021): The uniquely designed methodology for developing quest-excursions in the urban environment created and became the basis for the formation of new walking routes on the example of Almaty, combining interactive and informational elements aimed at organizing leisure activities of tourists and sightseers, in order to increase the demand for domestic and inbound tourism of the Republic of Kazakhstan.

The reliability of the results obtained is due to the theoretical and methodological validity of the approach to the topic of the issue, the appropriate choice of research methods, and the results obtained during the experiment, reflecting the conclusions of this work, as well as pedagogical and practical experience as a tour guide, university teacher, national coach of UNWTO WFTGA.

Research base: the experimental work was carried out on the basis of the Kazakh Academy of Sports and Tourism, Tourism and Service Academic Department; KazAST Research Institute for Tourism; the Kazakhstan Tourist Association (KTA); the Tourist Information Center of Almaty; MaxTravel tourist company; Dostar International School-Lyceum; Smart Tourism company.

The evaluation of the research results. The main provisions and results of the research were tested in speeches and reports at international scientific and practical conferences, in national and foreign publications, as well as implemented in the practical activities of the subjects of the tourist market and education of the Republic of Kazakhstan. The results of the dissertation research, Tourist-Toponymic Dictionary of Almaty Region and Fundamentals of Tourism and Local History Work textbooks were presented at international exhibitions and awarded with diplomas, Moscow 2016, 2017, 2018, Barcelona 2018.

The publication of the research results. The results of this research work were published in 22 scientific papers in the period from 2016 to 2020. One article on dissertation topic published in the journal included in the Scopus database; 5 articles included in the list of Committee on Quality Assurance in Education and Science of Ministry of Education and Science of the Republic of Kazakhstan; 6 articles in proceedings of an international conference; 1 collective monograph and 2 electronic textbooks obtaining patents No. 2717, No. 11534, 2 guide, 4 tutorials, and 1 in national publications.

The structure of the dissertation. The structure of the dissertation research consists of an introduction, three chapters, conclusion, list of references, and appendices.

The introduction substantiates the relevance of the research topic, forms the purpose, object and subject, tasks, research, determines the novelty, sources, and methods of research, the theoretical and practical significance of the research, the

main provisions submitted for defense, provides information about the author's personal contribution to achieving the scientific result of testing the results of the research.

The main part consists of three sections (analysis of the issue, methods, and organization of the research, own research, and discussion).

In the first section, "*Theoretical and methodological foundations of excursion business*" literature, Internet sources on theoretical and methodological aspects of the services discussed and studied; specific characteristics, the essence, the concept of the types and forms of excursion business identified; a retrospective analysis of the historical development of excursion service conducted; the term "excursion service" clarified; the basic components of the professional activity of guides presented.

The second section "*Current state of excursion service development*" analysis of modern forms and methods of excursion service presented both in the international and regional tourism market, regulatory and legal acts that affect the development and functioning of professional activities of tour guides in the Republic of Kazakhstan; the system of training and retraining of excursion service specialists in Kazakhstan analyzed.

In the third section "*Research results and discussion*" the system of modern physical and mathematical competence-oriented and interdisciplinary approach developed and implemented in the training of the guides within the Tourism educational program of the International Tourism: the Tourism Industry and Business educational trajectory on the example of the Kazakh Academy of Sports and Tourism; innovative approaches to the organization of excursion service formed and improved, on this basis Official Audio Guide of Almaty developed, the methodology of creation of the excursion-quests developed in the urban environment and the testing conducted when creating active excursion-quests; and tours with the use of QR codes conducted; inventory and certification of objects of tourist interest of Almaty and Almaty region conducted on the basis of the developed technique.

In conclusion, the results of the research summarized, confirming the solution of the tasks set, and the main findings are presented as follows:

- Excursion service is a kind of symbiosis between several similar definitions, the formation, establishment, and development of which took place over the centuries, in the context of pedagogy, local history, tourism, and service sector. In this regard, a clear understanding of both the historical stages of the development of guided tours, as well as the theoretical and methodological foundations, gives us the opportunity to clarify the modern meaning of the term "excursion service", which would fully reflect the essence of the entire direction.

- The main element of the excursion service is undoubtedly the excursion. Scientists have repeatedly emphasized its importance and specificity. Throughout its development, there was a transformation of the forms of excursions: "excursion as a walk that pursues practical tasks", "excursion as a method of local history work, scientific significance", "excursion as a process of education, general education purpose", "excursion as a type of cultural and educational activity aimed at aesthetic

and cultural development", "excursion as part of tourism, service sector", which entailed a change in the purposes and objectives, functions and forms of the excursion process.

- A clear understanding of the classification features of the organization of the excursion process allows developing a competent approach to the creation of innovative forms of excursion service. The integration of the existing domestic base of excursion service into the international system will allow developing a unique product for the training, retraining, and advanced training of tour guides, as well as their professional activities.

- The analysis of the system of training of tour guides makes it possible to comprehensively assess this process in the territory of the Republic of Kazakhstan. The different, often contradictory approaches that are present in our country today help to consider that it is necessary to standardize this process.

- Development of a unified professional standard tour service in the Republic of Kazakhstan, regulating not only the delivery of tour services but also the whole system of training, retraining, and advanced training of tour guides and their professional activities, will contribute to the implementation of innovative forms and methods of the services, to attract foreign tourists and to increase the overall level of tourist-excursion services in our country.

- Today, the training of tour guides in Kazakhstan is carried out in several ways: training at a university with a special trajectory, courses organized jointly by universities and subjects of the tourist market outside of educational programs, training abroad, passing UNWTO WFTGA courses in 600 hours. After obtaining the necessary qualifications, the guide must take courses that promote professional growth.

- In order to monitor the quality of the work of existing tour guides, several voluntary registers have been created in Kazakhstan. To exceed the efficiency, it is necessary to systematically approach the process of training, certification, licensing, and activities of tour guides, guaranteeing the prestige of the profession.

- Integration into the international excursion space, formation of innovative approaches based on the theoretical and methodological principles of the excursion business, and developing in the context of modern requirements of excursion service and the principles of the national and international tourist market.

- The modern development of excursion services is the process of implementing the principles of humanization of society, which consist of the formation of a high-quality information space that promotes cultural and traditional values through the organization of excursions in the context of the tourism industry.

- Training of tour guides, accreditation, and standardization of their activities allows preparing highly qualified specialists who have an active impact on the domestic and inbound tourism of the country. The approach developed by the authors to the process of training future guides within the framework of the Tourism EP, through the development of the International Tourism: the Tourism Industry and Business educational trajectory, which allows getting an additional qualification - Guide - III category. This research work and experience make it possible to confirm

the effectiveness of its implementation in the modern education system of the Republic of Kazakhstan in the direction of Tourism and to guarantee the quality of professional personnel in excursion service, as well as to promote its development.

- Development of new and improvement of existing directions, forms, and methods of excursion services, makes it possible to provide a wide range of excursion services. Unique designs on creating the Official Audio Guide of Almaty and interactive and thematic excursions, quests, excursions with the use of QR codes, expand the offers of the tour services market, and a unique method of certification of excursion objects of interest allowed carrying out experimental work in Almaty and Almaty region on making an inventory of the attractions.

Practical guidelines are as follows:

1. To form a unified standard for the training of tour guides in the Republic of Kazakhstan, which allows for the training, retraining, and advanced training of tour guides in accordance with international and regional requirements.

2. The training of tour guides should be carried out on the basis of the university, within the framework of the Tourism EP or a separate educational program, since the development of a new profession should be clearly reflected in the disciplines that are practice-oriented and guarantee the quality of training of future specialists.

3. The formation of an educational program in the field of excursion service should be systematic, competence-oriented, and interdisciplinary, as well as based on international and regional professional standards, requirements for the higher education system, and the demands of the labor market.

4. The process of retraining and advanced training of guides should be systematic, it is necessary to develop requirements for this process, allowing clearly regulating the order and frequency of taking guide courses of 72 hours or more.

5. To develop rules for licensing excursion activities aimed at the full implementation of the regulatory and legislative documentation of the Republic of Kazakhstan in the field of excursion service.

6. To create a single standard of excursion service in Kazakhstan, which is a reasonable symbiosis of previously created standards, which is mandatory, not advisory.

7. The introduction of a single register should be mandatory, while the register created in the republic has a number of shortcomings. The implementation of the above-mentioned practical recommendations will be aimed at improving the activities of this register since a unified form of confirmation of qualifications will guarantee the professional activity of tour guides.

The appendix presents the results of testing in the educational process on the basis of the Tourism and Service Academic Department of the Kazakh Academy of Sports and Tourism: **the act of implementation** to Animation in Tourism educational and methodical complex; **the act of implementation** to Fundamentals of Tourism and Local History Work educational and methodical complex; **the act of**

implementation to the Museum Studies educational and methodical complex; **the act of implementation** to the Tourist-Toponymic Dictionary of Almaty Region textbook in three languages (Kazakh, Russian, English); **the act of implementation** to the Fundamentals of Tourism and Local History Work textbook; **the act of implementation** to the 200 Excursion Objects of Almaty textbook; **the act of implementation** to the 150 Excursion Objects of Almaty Region textbook.

The results of the dissertation research were tested on the subjects of the tourist market: **the act of implementation** from the Kazakhstan Tourist Association (KTA); **the act of implementation** from the MaxTravel tourist company; **implementation act** from Dostar International School-Lyceum; **reference** from the Smart Tourism company; certificate of copyright on the electronic Tourist-Toponymic Dictionary of Almaty Region textbook, Almaty Oblasynyn Turistik-Toponymderinin Sozdigi (Kaz: Алматы обласының туристік-топонимдерінің сөздігі); diplomas and certificates of the international exhibitions and competitions.