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HISTORY OF THE IMPLEMENTATION OF SOCIAL TOURISM PRACTICES IN EUROPE AND UKRAINE

Abstract

The purpose of the study is to examine the historical experience of implementing social tourism practices and their relevance in modern conditions. **The methodology is based** on the use of a complex of scientific methods: historical, comparative, generalization, systematization of psychological and pedagogical, scientific and methodological, and specialized literature; comparison of different views on the problem under study; modeling; analysis of the definition of concepts. Empirical methods are also used, in particular statistical methods: the method of determining the integral indicator, the method of predicting the accuracy of expert assessments, the method of assessing the representativeness of the sample, as well as methods of analyzing empirical data using information technologies. **Scientific novelty.** An analysis of foreign experience in social tourism has been carried out, showing that state support, a clearly defined strategy, and funding are necessary conditions for the development of this type of tourism. To this end, it is necessary to formulate a clear policy with principles that correspond to the tourism development strategy for the coming years: targeted support for social tourism by state authorities and local self-government bodies; legal regulation of relations between participants in social tourism (the state, travel agencies, tour operators, tourists, travel agents); support for producers of national tourism products; creation of favorable conditions for the development of social tourism among different categories and groups of the population and its promotion; consideration of the interests of all citizens in the development and implementation of social tourism development programs. **Research results.** Scientific approaches to understanding and researching social tourism are considered, and the theoretical and methodological foundations and practical directions for ensuring the innovative development of this type of economic activity are substantiated. Practical problems of organizing social tourism are analyzed, in particular, obstacles that arise in the way of innovative development of this type of economic activity.

Keywords: social tourism, structure, foreign practices of social tourism, innovative development, organization.

ІСТОРІЯ ВПРОВАДЖЕННЯ ПРАКТИК СОЦІАЛЬНОГО ТУРИЗМУ В ЄВРОПІ ТА УКРАЇНІ

Анотація

Метою дослідження є вивчення історичного досвіду впровадження практик соціального туризму, а також їхня актуалізація в сучасних умовах. **Методологія** базується на використанні комплексу наукових методів: історичний, порівняльний, узагальнення, систематизація психолого-педагогічної, науково-методичної, спеціальної літератури; зіставлення різних поглядів на досліджувану проблему; моделювання; аналіз визначення понять. Використовуються також емпіричні методи та зокрема статистичні методи: метод визначення інтегрального показника, метод прогнозування точності експертних оцінок, метод оцінювання репрезентативності вибірки, а також методи аналізу емпіричних даних за допомогою інформаційних технологій. **Наукова новизна.** Здійснено аналіз зарубіжного досвіду соціального туризму, який показує, що необхідною умовою розвитку такого виду туризму є державна підтримка, чітко сформована

стратегія та фінансування. Для цього необхідною стає формування цільової підтримки соціального туризму органами державної влади та місцевого самоврядування; правове регулювання відносин у напрямку регулювання відносин учасників соціального туризму; підтримка виробників національного туристичного продукту; створення сприятливих умов для розвитку соціального туризму серед різних категорій та груп населення та їх популяризація; врахування інтересів усіх громадян при розробці та реалізації програм розвитку соціального туризму. **Результати дослідження.** Розглянуто наукові підходи до розуміння та дослідження соціального туризму й обґрунтовано теоретико-методологічні засади та практичні напрями забезпечення інноваційного розвитку цього виду економічної діяльності. Проаналізовано практичні проблеми організації соціального туризму, зокрема перешкоди, які виникають на шляху інноваційного розвитку цього виду економічної діяльності.

Ключові слова: соціальний туризм, структура, зарубіжні практики соціального туризму, інноваційний розвиток, організація.

Introduction. As we know, social tourism is a concept that combines travel with social, cultural, or environmental benefits, focusing on impactful, accessible tourism and social inclusion. When done right, it benefits travelers, local communities, and the environment. It is not only about visiting new places, but also about making a positive contribution to the lives of local residents. The development of social ties contributes to a healthier tourism industry. This approach not only enriches the travel experience, but also helps to build more sustainable and stable communities.

Social tourism aims to provide travel opportunities to people who do not normally have access to them, such as low-income individuals, the elderly, or people with disabilities. It also emphasizes responsible and sustainable tourism practices that enrich (rather than exploit) the regions visited. By prioritizing these groups, social tourism helps to ensure that the benefits of travel are more widely shared.

All travel can include, for example, some elements of social tourism. Perhaps the one unifying element that brings all these concepts together is the goal of providing certain groups in society who would otherwise be unable to do so with the opportunity to take a vacation. However, in order to develop knowledge, research, and practice in the field of social tourism, it is essential to be able to define and develop boundaries around this concept, which is the aim of this section. This is no easy task, however. "Social tourism" can be interpreted in different ways, for example, from the perspective of the main stakeholders involved in providing it. These often include commercial and non-commercial, governmental and private organizations, each of which often has a different understanding of what social tourism means. Service providers range from small charities that organize vacations for children from low-income families to government agencies responsible for improving hotel accessibility and private tour operators that offer vacations that can be considered socially sustainable.

Analysis of recent research and publications. Summarizing the findings of virtually any study has always been and remains a reliable basis for its further objective examination. In preparing this scientific work, publications from various countries, including Ukrainian ones, both national and local, were used.

Significant contributions to the development of various aspects of social tourism have been made by such domestic researchers as O. Kolotukha (2009), Yu. Felenchak (2021), K. Zadorozhna (2016), Teodorovich L. V., & Khomin O. Y. (2010).

However, despite the fact that methodological and applied issues of social tourism development at the local, regional, and national levels have been thoroughly researched in Ukrainian science, the formation of theoretical and methodological foundations for this field is still in its early stages. Particularly relevant issues include the consideration and analysis of the historical aspects of the introduction of social tourism.

The purpose of the study is to examine the historical experience of implementing social tourism practices and their relevance in modern conditions.

The objectives of the article are to analyze the available source base for the study, review Ukrainian and foreign historiography on the topic, and examine historical practices of social tourism in Europe and Ukraine.

The methodology is based on the use of a complex of scientific methods: historical, comparative, generalization, systematization of psychological, pedagogical, scientific, methodological, and specialized literature; comparison of different views on the problem under study; modeling; analysis of concepts – to clarify the essence of the readiness of future tourism specialists for professional activity in the field of social tourism. Empirical methods are also used: diagnostics; methods of mass collection of empirical material; content analysis of regulatory documentation, educational and professional programs. Statistical methods are also used: the method of determining the integral indicator, the method of predicting the accuracy of expert assessments, the method of assessing the representativeness of the sample, as well as methods of analyzing empirical data using information technologies.

Presentation and discussion of the main research material. The influence of the state within the framework of its policy extends to many areas and social aspects of the economic process, which necessitates the accurate identification of problems arising in these areas and, subsequently, the proper determination of methods and means of intervention. Therefore, within the framework of the entire socio-economic policy, various spheres of influence and subsystems are being developed, such as macro- and microeconomic policy, international policy, regional policy, and policy in specific sectors of the economy. One example of sectoral policy is tourism policy, which allows the country to directly influence the tourism economy. It is also manifested in other specialized sectoral policies, in particular international and regional, industrial, employment, environmental, cultural, trade, and communication policies (Kolotukha, 2009, p. 179).

At the heart of tourism socialization lies the tourism potential of the territory, which is shaped by both natural and historical-cultural tourism resources and the presence of tourism enterprises and organizations with qualified personnel (Felenchak, 2021, pp. 5-6). During such interaction, new social ties are formed that promote mutual understanding and tolerance. Since tourist flows are not only domestic but also international in origin, the processes of tourism socialization are inevitably subject to the intense influence of globalization factors. It is clear that thanks to globalization, people now have easier access to places that were previously difficult to visit. Now people can travel to almost any corner of the world using inexpensive flights and improved transport networks. This has opened up new and exciting destinations that were previously inaccessible, allowing people to experience more diverse cultures and landscapes (Savelieva, 2019, pp. 40-41).

Social tourism mainly revolves around the inclusion of economically and socially disadvantaged populations in travel and tourism through interventions (or policies, financial or other support) of a clearly defined social nature. According to a growing body of research, this inclusion has numerous socio-psychological benefits for disadvantaged groups. These individual benefits, combined with the conceptual basis of social tourism, can lead to a public perception that social tourism is exclusively about welfare. However, evidence from social tourism practices in continental Europe (e.g., the IMSerso and Inatel Social Tourism programs in Spain and Portugal, respectively) suggests that social tourism simultaneously promotes employment generation and economic growth for hosts who suffer from seasonality. Despite these strong links between social tourism and sustainable development, social tourism remains under-researched in the vast literature on sustainable

tourism. This may be due to the fact that debates on tourism and sustainable development have mainly focused on environmental and economic issues, overshadowing socio-cultural ones. The above-mentioned effects complement the positive impact on social tourists, which concerns the involvement of socially vulnerable groups in tourism and the positive impact of this involvement on their quality of life. Thus, these numerous benefits simultaneously address important social and economic problems (e.g., unemployment and social isolation) that persist in several countries, especially those still suffering from the negative effects of the recent financial crisis, such as Greece. However, to the authors' knowledge, there is only one conference paper in Greek tourism literature that briefly discusses social tourism in relation to the socio-economic aspects of sustainable development (Savelieva, 2019, pp. 40-41).

A social network can be dense or sparse, depending on the economic strategy adopted. The charter also states that "such participation is made possible or facilitated by a combination of policies, clear social measures, and the commitment of social actors." The European Social Tourism Exchange Platform (STEEP) project was launched in April 2012, and its main objective is to create an information and transaction platform that brings together supply and demand in the field of social tourism in the European Union (Jablonska, Jaremko, & Gejza M., 2016, p. 42).

Social tourism is still in its infancy in Slovakia. Given that Slovakia ranked 24th among 130 countries participating in the assessment in 2014 in terms of the social progress index (SPI index – 78.93), which reflects the wide variety of living standards in the country. We see that the first pillar for building social tourism in Slovakia is Law No. 313/2005 Coll. with amendments regarding the social fund, according to which an employee may be granted vacation assistance from the social fund, which is created from the gross wages of all employees in the amount of 0.6 to 1% of the initial amount (Jablonska, Jaremko, & Gejza M., 2016, p. 44).

Slovakia's experience is truly indicative. For example, the first Slovak association of social tourism institutions, non-profit and commercial enterprises is Zdruzenie Socialny turizmus (Social Tourism Association). Zdruzenie Socialny turizmus (ZST) is a new institutional structure founded in 2011 on the initiative of the founder of the non-profit organization Domovina, Mr. Juraj Beni. ZST is based in the Zegra part of the town of Godkovce, near the historic Chack Castle. In its mission and goals, ZST states its interest in making historical castles and other historical monuments and monasteries in the Spiš region of Slovakia accessible to the general public. (SACR Slovak national tourist board, available at: http://www.sacr.sk/en/slovak-tourist-board/news/).

An example of a mixed-type facility providing year-round accommodation is Podhradie (DSSSPP). This social care home provides services to adults who are dependent on the assistance of others due to poor health or severe disability (Tourism watch: Tourism in Western Saharan Refugee Camps http://www.tourism-watch.de/en/content/tourism-western-saharan-refugee-camps)

Refugee camps, shelters where people who find themselves in difficult circumstances gradually become visible to travelers who are looking for more than just luxurious vacation spots or artificial environments frequented by the elite. Travelers who visit refugee camps usually encounter faces that reflect the tragedies and difficult living conditions of the past. Sometimes refugees from different cultural backgrounds can be hostile towards each other (SOREA hotel http://www.sorea.sk)

Another hotel chain specializing and hospitals accessible to all social classes. Accommodation at very low prices is also provided to military personnel and former military personnel, socially vulnerable people, and people with low incomes.

European practice shows that family capital is based on family stability on the one hand and parents' social contacts on the other. First, better relationships between family members can reduce tension and thus make family life more enjoyable. Such improvements in relationships are typically illustrated by examples such as more frequent family outings or spending "quality time" together after a vacation. Increased family capital is more often associated with higher educational attainment and aspirations, and is also said to improve family stability. Both of these factors can reduce certain characteristics (low education, family breakdown), thereby achieving the social policy goals defined in the MUD framework and benefiting both participants and society as a whole. Second, it has been shown that participants' social contacts have increased—most clearly in the case of group vacations. Participants in group recreation mentioned meeting new people as one of the main benefits of the vacation and often kept in touch with other participants after the vacation (French government policy on tourism. http://infotour.in.ua/france-gos.htm)

Social tourism in France is a concept aimed at providing affordable and accessible vacations, initially for working-class families and children, with the goal of providing social, educational, and health benefits. Historically, this included initiatives such as summer camps and resorts, and today it encompasses broader efforts to promote equal access to tourism, with current trends leaning toward sustainability, the use of online booking platforms, and adaptation to busy lifestyles.

Atout France's roadmap for sustainable social tourism is based on key government recommendations and the national strategy of the "Destination France" plan and its variations. The goal is for France to become the global benchmark for sustainable tourism by 2030. The organization has developed three programs: Promotion of strategic tourism projects in the regions of France and Support for the development of tourism in cultural heritage sites (Lebon, 2023, p. 85-86).

The main goal of the business is to foster positive attitudes and behavior, business competence towards customers, and the existence of service standards, management, and service quality audits. Several tourist villages in Bali, such as Penglipuran, Bedulu, Tihingan, and Belimbing, have identified the characteristics of tourism development: namely, the preservation of traditional architecture, customs (community rituals), ancestral heritage, and adherence to ancestral rules, which provide positive value for the lives of generations. The various constraints and challenges faced by the community in tourism development require policy research that can provide legal protection for community-based tourism development.

Social tourism in Ukraine as a direction of socio-cultural and humanitarian policy requires not only legislative recognition by the state, but also unconditional assistance and support in its organization and sustainable development in modern Ukraine. As a result, we know little about the relationships between social tourism programs and changes in governance dynamics or implementation mechanisms, as well as the implications for social tourism policies and programs that arise from these changing relationships. This gap prompted this study. It can be an effective factor in the recovery of the nation and a sub-sector of the country's economy in the context of partnership between its public and private sectors (Alexandrova & Sova, 2017, p. 6).

Since 1985, Spain has been pursuing a policy of stimulating domestic tourism demand through a social tourism program aimed primarily at improving the well-being and quality of life of users (mainly, but not exclusively, the elderly). Thus, the IMSERSO tourism program is based both on the aspect of welfare/social security, which is common to many social tourism programs, and on support from the supply this activity contributes to

reducing seasonality (Fernández-Morales, Antonio & Cisneros-Martínez, José David & McCabe, Scott, 2016, p. 177–178).

However, in recent years, criticism of the program has intensified, particularly regarding the use of public funds to support hotel operating costs during the off-season, despite references to its progressiveness as a scheme to support workers and employment. There are growing signs of concern about the unequal distribution of benefits among the various stakeholders, combined with concerns about the tender procedure for implementing the program, which periodically leads to the suspension of the tender process for IMSERSO contracts. In addition, tensions between the various actors and institutions involved in the implementation of the program have been further exacerbated by the impact of the 2008 global financial/sovereign debt crisis on public finances and, more recently, by the collapse of tourism since the end of March 2020 following the outbreak of the COVID-19 pandemic (Gago-García, González-Relaño, Serrano Cambronero & Babinger, 2021).

The nature and organization of social tourism programs vary considerably and are linked to the socio-political traditions, ideologies, and state systems of each country. European social tourism policy can be divided into three broad categories: the policy of Central and Eastern European countries during the era of state socialism, when domestic tourism was financed by the state and participation in tourism was considered a social right based on its contribution to the health and well-being of the workforce. The Northern European model, where social tourism is based on the principles of universal access for all members of society. The third type covers mainly Mediterranean countries, where social tourism systems grew out of trade unions, cooperatives, and workers' clubs, which effectively invested in accommodation structures and the tourism business to provide their members with opportunities for recreation on a non-commercial basis.

Such a broad characterization of differences in social tourism systems can only provide a general idea of what is in fact an extremely diverse range of measures and policies aimed at meeting a wide range of needs and users. However, it does indicate how social tourism systems are inextricably linked to the socio-political models of governance, approaches to social security, distributive justice, and rights that prevail in different countries, which requires attention to these issues. Indeed, there are critical voices that question the extent to which social tourism programs can promote social equality (Fernández-Morales, Antonio & Cisneros-Martínez, José David & McCabe, Scott, 2016, p. 182–183).

The IMSERSO program is a striking example of how demand for places significantly exceeds their availability, or how evaluation criteria are applied (a points system based on equal opportunities based on age, disability status, economic situation, participation in the program in previous years, and belonging to a large family). In 2019/20, 900,000 trips were supported out of a total of nearly 4 million applications to participate in the program.

Ukraine's state policy on the development of social tourism should, on the one hand, be guided by examples of foreign experience and, on the other hand, comply with the following principles: targeted support for social tourism by state and local authorities; legal regulation of relations between participants in social tourism (the state, travel agencies, tour operators, tourists, travel agents); support for producers of national tourism products; creation of favorable conditions for the development of social tourism among different categories and groups of the population (Kolotukha, 2009, p. 179).

• tax exemption for voluntary contributions by legal entities and individuals, including foreign ones, to support social tourism;

• when providing social tourism services (in the system of children's and youth tourism, tourism for the elderly and tourism for people with disabilities of any kind), converting the

value added tax on tourism products into a social tourism rent that is not subject to taxation and is entirely directed towards the support and development of social tourism;

• exempt educational institutions that train social tourism specialists from property tax, housing maintenance tax, and tax on social and cultural facilities;

• implementation of free targeted certification;

• establishment of preferential travel for organized children's, youth, and student tourist groups throughout the year.

• introduction of a preferential tax scale for services provided by social tourism establishments for health improvement, tourist and excursion services, manufacture and rental of tourist equipment, as well as for taxes on the property of social tourism establishments and on the maintenance of social and cultural facilities;

The development of these areas is preceded by the availability of natural and recreational resources in the form of resort and treatment zones located in areas for recreational purposes, which have natural healing resources and objects of natural, historical, and cultural environment and can be used for the organization of recreational activities, recreation, treatment, and tours, including psychological and psychotherapeutic services, and can meet the need for medical care and revitalization (Rahmanov, Letunovska & Lyulyov, 2020, p. 150).

The main idea of social tourism – its multifaceted social accessibility with the aim of creating opportunities to attract as many people as possible to active recreation with minimal financial costs – is present in many other types of tourism. Budgetability and motivational requests of social tourism clients contribute to the development of the social tourism sector, which is mainly aimed at domestic tourists who plan to restore health and work capacity within their country. Social tourism also involves vacations of tourists abroad, but taking into account the flexibility of the price policy of tour operators and travel agents and subsidization by state and non-state funds (charity organizations, religious communities, assistance of patrons, etc.) (Garbar, 2015, p. 41–42).

The system of social tourism provides for certain categories of the population not only discounted tickets, but also significant discounts during accommodation in hotels and catering establishments, as well as discounts for purchasing tickets for various types of tourist services and transport services. For example, there is an established system of youth hostels (cheap student dormitory-type hotels) all over the world, which enables young people under the age of 25 to receive significant discounts on accommodation, food, and transportation. As G. Harbar (2015) rightly points out, social tourism reflects the maturity of social relations, affects the stability of society, the quality of life of its citizens, therefore its development should be aimed at forming in people the idea that tourism contributes not only to recreation, but also to self-development, self-improvement of a person and society as a whole. A month after the holidays, a general improvement in this area was reported. Many comments showed how it had a positive effect on both children (do better at school, are proud of themselves and enjoy spending time with their parents, behave better) and parents (less guilt, more positive attitudes towards children, spending quality time together). This change in behavior was directly related to the respondents' vacation experience: after spending time together on vacation and engaging in new activities, this new pattern of behavior was repeated at home.

It is necessary to ensure the most comfortable living conditions for people with physical disabilities, in particular, the creation of a "barrier-free" environment in which people with disabilities will be able to use all elements of the infrastructure without any difficulties, visit any facilities, both residential and public, move freely by transport and have access to information. Inclusive tourism is a process that reduces the isolation of people with

disabilities in society by increasing the participation of each individual disabled person in all processes of life in modern society (Kyrylyuk, 2007, p.23-24).

Conclusions and Prospects for Further Research. Social tourism can be considered one of the most effective elements and directions of the state's effective social policy. However, a number of factors that restrain its development – infrastructural, socio-economic, mental – still prevent its full use as a mechanism for building a healthy and socially responsible society. Social tourism is not only a mechanism for ensuring the right to vacation and freedom of travel for low-income groups of the population, but also a resource for ensuring productive employment for the population of the territory, a tool for regional development, a mechanism for forming a positive image and promoting the destination.

Conflict of Interest

The author declare no conflicts of interest.

Use of Artificial Intelligence

No artificial intelligence tools or materials were used in the manuscript.

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