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### **Definition of the different social tourism models in the World**

Social tourism phenomena is becoming more and more popular all over the world. On the basis of its creation lies the equality of every person and satisfaction of each citizen about its right for rest and holiday. Originally, it has developed in Europe, however nowadays it becomes popular in other parts of world. This paper examines social tourism in different countries, makes comparative analysis of different models of social tourism. Authors tried to explain the nature of social tourism, subsidizing sources and target groups of each model.

**Key words:** tourism, social tourism, models of social tourism, vouchers.

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### **Әлемдегі әлеуметтік туризмнің әр түрлі модельдерінің анықталуы**

Әлеуметтік туризм мәселесі бүкіл әлемде кеңінен таралуда. Оның қалыптасуының негізінде адамдардың демалу құқығы қорғалады. Туризмнің бұл түрі алғашында Еуропада дамуынан бастап соңғы жылдары әлемнің барлық елдерінде бастау алуда. Жалпы бұл мақалада әлеуметтік туризмнің рөлі анықталады және әлеуметтік туризмнің әртүрлі модельдеріне салыстырмалы түрде талдау жасалады. Әлеуметтік туризмнің мән-мағынасын және табиғатын айқындауға тырысады.

**Түйін сөздер:** туризм, әлеуметтік туризм, әлеуметтік туризм модельдері, ваучерлер.

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### **Определение различных моделей социального туризма в мире**

Явление социального туризма становится все более и более популярным во всем мире. На основе его создания лежит равенство каждого человека и удовлетворение каждого гражданина о его праве на отдых и отпуск. Первоначально подобное туристское направление развивалось в Европе, однако в настоящее время становится популярным и в других частях мира. В данной статье рассматривается роль социального туризма в разных странах и составляется сравнительный анализ различных моделей социального туризма. Авторы попытались объяснить природу социального туризма, субсидирующие источники и целевые группы каждой модели.

**Ключевые слова:** туризм, социальный туризм, модели социального туризма, ваучеры.

**DEFINITION OF THE  
DIFFERENT SOCIAL  
TOURISM MODELS IN  
THE WORLD****Introduction**

Social tourism is broad and versatile concept in tourism sphere. Its' complexity can be encountered in early interpretations of this phenomenon. Namely, Hunzicker (1951) describes social tourism as 'the relationships and phenomena in the field of tourism resulting from participation in travel by economically weak or otherwise disadvantaged elements in society' [1]. In 1957, Hunzicker added a comment regarding the nature of social tourism provision, defining the concept as 'a particular type of tourism characterized by the participation of people with a low income, providing them with special services, recognized as such'[2]. Much more modern description of social tourism has been provided by Lynn Minnaert. According to her social tourism is tourism with an added moral value, of which the primary objective is to benefit the host or the visitor in the tourism exchange. In practice, social tourism usually refers to budget-friendly holidays in the own country, either individual or as part of a group, or in some cases day trips to theme parks, museums and attractions, that are funded or made available at highly reduced rates, by charities or agencies in the public sector [3].

Therefore tourism for the definite social groups of people is very actual in the arising economic condition in the world and Kazakhstan. The world experience of this research topic can be traced back from early 17th century which proves its' critical use in the society. Thorough study of different models of social tourism is very crucial in application an realization of this system. So in the article there attempts of considering social tourism in different countries under certain category of its' essence.

**Literature review**

In the English-language literature, social tourism has developed from a subject that was addressed but sporadically, to an area of increased research interest. The earliest definition of social tourism was given by Hunzicker who defined social tourism as "the relationships and phenomena in the field of tourism resulting from participation in travel by economically weak or otherwise disadvantaged elements in society". According to Lynn Minnaert, social tourism

is tourism with an added moral value, of which the primary objective is to benefit the host or the visitor in the tourism exchange. In practice, social tourism usually refers to budget-friendly holidays in the own country, either individual or as part of a group, or in some cases day trips to theme parks, museums and attractions, that are funded or made available at highly reduced rates, by charities or agencies in the public sector [4]. Moreover in the Manila declaration social tourism was defined as main aim which should be achieved in favour of the underprivileged. Beneficiaries of social tourism are people who would like to travel but cannot due to a certain disadvantage: this could be the lack of money for example, or a health problem or disability that inhibits participation in tourism. In several countries of the European Union, social tourism is provided at either very limited cost to the state, or in ways which simultaneously stimulate the local economy and increase the income of the state via taxation and a reduction of unemployment benefits [5].

In spite of the fact that social tourism exists for more than 60 years and really developed in some countries, its' definition is still interpreted differently according to specific peculiarities of countries.

Social tourism stands for the modern society needs which requires justice, satisfaction of lives and moral values [8].

Recent description to the social tourism was made by the International social Tourism Organization: "the totality of the phenomenon and respect which arises from the participation to tourism, in particular, the underprivileged with low income". Taking part in this kind of activity should be realized on the account of social direction.

This leads to the new conceptual meaning of the social tourism which is more about social and moral values. As the tourist market is not able to provide the product which will fit everybody, there is a need for the intervention that would make tourism available for all. Moreover, another full and objective definition of the tourism was offered by L. Minnaert, G. Miller and R. Maitland. According to them social tourism – is the type of tourism with added moral values for the hosting and hosted sides of tourist exchange. This concept refers to the ethical side of social tourism [9].

Furthermore another meaning of social tourism: "the concept of social tourism implies, that all citizens, in spite of their economic and social status should have an opportunity for the vacation". From this point of view, annual vacation is considered as any other rights of the person, this kind of social loss should be compensated by the government for the social welfare [10].

Economic and social committee of European union redeems, that social tourism is organized in majority of countries by associations, cooperations, trade unions and designed for the provision of access for the travel to as more people as possible, in particular, the weaker strata of the society and forms its own vision of social tourism: each person has a right for the daily, weekly and annual vacation. As well as the right for the free time which can let them develop each aspect of their personality and social integration. Social tourism – is the instrument for the achievement to the universal, accessible mean for the realization of the right for tourism.

Among Soviet and Russian authors there are also different visions for the interpretation of social tourism. The very first definitions were performed by V. I. Azar, V. N. Akishin and M. B. Birzhakov: "social tourism is the variety of tourism, which are subsidized by the means, allocated for the social needs, in order to provide amenity to travel for pupils, youth, pensioners, veterans and other citizens for whom governmental and non – governmental funds and other charity organizations render social assistance". According to this interpretation it can be noticed that more accent goes to the financial part of social tourism, although it is one of the more comprehensive meaning given by the Russian authors [11].

Moreover, the definition of social tourism can be met in the legislation of the Russian federation. In the law "The basis of tourist activity of Russian federation", which was accepted in 4 of October of 1996, social tourism is interpreted as "travels subsidized by the means allocated from the state". This treatment is incomplete. The draft of the federal law "On social tourism" developed by the Russian state committee for tourism and sport, provide the following definition: "social tourism is the sphere of creation, promotion and implementation of social tourism product to meet the needs of travel and other kind of tourism for socially protected citizens". This interpretation is also incomplete since it is not clear from what means the social tourism product is subsidized and what category of citizens are considered to be vulnerable [12].

In addition to this definition there is one more given in another federal law "On social tourism" proposed by the Moscow center of the Russian association of Social Tourism Academy: "social tourism is the travel subsidized from the funds allocated by the state for social services and other sources of funding in order to meet the rights and needs of citizens of the Russian federation" [13].

Meanwhile, O. Serdobolskaya formulated the different definitions of social tourism which is the

form of social tourism that covers all social strata and age groups which are subsidized travel from different budgets based on the social category of the citizens.

In all, Russian and Soviet authors tend to lay on the financial aspects of social tourism to the government. That is what differentiates them from European authors, also there is an definition of Brazilian scientist who thinks that the development of social tourism – is the main priority of the

government. While M. Almeida supposes that social tourism – is the type of tourism which is promoted by the state in the aim of psychophysical rehabilitation and sociocultural development of the individuals in the accordance of the principals of sustainable development, which should be implemented in the place of visit, that is tourist regions [17].

Below, in the table 1 there is a comparative analysis of definitions based on some criteria proposed by Zh. Assipova.

**Table 1** – Comparative analysis of the definitions of social tourism [11]

Author	Object	Subject	Financial support	Aim
V.Hunziker	Indefinite	The poor and underprivileged	Indefinite	Participation in tourism
International Organization of Social Tourism	Organizations providing social needs	The poor	Indefinite	Participation in tourism
L.Minnaert, R.Maithland, G.Miller	Hosting/visiting sides	Hosting/visiting sides	Indefinite	Adding moral value to tourism
Manilla Declaration	Society	All citizens	Indefinite	Right for recreation and tourism
Economic and social committee of European Union	Indefinite	All citizens	Indefinite	Right for recreation and tourism
V.I. Azar, V.N. Akishin, M.B. Birzhakov	Government, governmental and non-governmental funds and other charity organizations	Pupils, students, pensioners, veterans of war and labour	Government, governmental and non-governmental funds and other charity	Participation in tourism
Law «The basis of tourist activity of Russian federation»	Indefinite	Indefinite	Government	Travel
The project of Federal Law «About social Tourism» Committee of sport and tourism	Indefinite	Weak strata of the society	Indefinite	Satisfy the needs in tourism
The project of Federal Law «About social Tourism» Russian Association of social tourism and Moscow centre of Tourism academy	Indefinite	Citizens of Russian Federation	Government and other organizations	Provision of the right for travel
I.O Serdobolskaya	Indefinite	All citizens	Indefinite	Subsidised tourism
M. Almeida	Government	Individuals	Government	Socio-physical rehabilitation and socio-cultural development

## Methods and methodology

The aim of this work is to give general overview of social tourism models in different countries as, The United Kingdom, Ireland, Belgium, France, Poland, Denmark, Spain, Hungary, Brazil, Russia, Bashkortan and of course Kazakhstan. So analysis of social tourism models were done on the basis of systematic approach using content analysis of scientific literature, comparative method, analytical method.

## Results

Social Tourism scheme in Europe today can be examined under four interpretation groups:

Social tourism is tourism that specifically encourages the participation in tourism activities of persons who are economically weak or otherwise disadvantaged [4].

Social tourism initiatives in this category aims to provide all the social groups of the society. So this group implies tourism experience that are already available for the majority as well as the groups of people who are excluded from them for financial or health problems. This type of tourist product is a standard and the same product as for the non social tourist groups. It mainly encourages all social strata to travel and benefit from tourism activities that can help for the disabled, the underprivileged and other different groups of people who are otherwise excluded from travel and recreation. This is so called *participation model*.

Social tourism in Belgium. Centre for holiday participation in Flanders is a unique organization that integrates the work of private sector, government sector and social organization. These three sectors work in collaboration in order to provide one complex tourism product. Private establishments act as a supply side while government organization demand side and social institutions play the role of connecting interrelation body. To increase the participation in tourism of low-income groups, the Centre negotiates reduced tariffs with accommodation providers and tourist attractions. These discounts are offered on a voluntary basis by the private sector in exchange for increased business, added publicity and inconsideration of corporate social responsibility objectives. The discounted products are only available for persons on low incomes their income status is either confirmed by a support worker in the social sector or beneficiaries provide a proof of their income themselves [4]. Social tourism is tourism that encourages participation in tourism by all, including

persons who are economically or otherwise disadvantaged/

In comparison with the first category of social tourism this group is not limited to the disadvantaged. It targets to the all persons considering them in different social groups. through subsidized schemes such as holiday vouchers. Such initiatives see assistance to participate in tourism as a universal benefit, but with particular benefit to the economically least well off. The tourism product offered is again standard, the same for disadvantaged and non-disadvantaged groups. These types of initiatives will be referred to as the *inclusion model* [4].

A benchmark of this system can be Cheques Vacances. holiday voucher scheme, implemented in 1982 and managed by a public agency (ANCV, Agence Nationale pour les Chèques-Vacances). This scheme does not differentiate between the non-profit sector and the commercial sector in where the cheques can be spent. The holiday voucher is worth €10 or €20, partly or wholly financed by the employer. They can be used with registered transport, accommodation or leisure companies.

Implemented by the socialist government under the impulse of trade unions and tourism associations, the holiday voucher was conceived as an element of social democracy which would increase equity and holiday accessibility. Yet its functioning seems paradoxically more in line with neoliberal principles: responsibility, an employer's contribution, free choice of service provider, budget surplus allocated to social action measures and no spending from the government budget (excluding tax exemption measures) [5].

Likewise model operates in Poland and Denmark.

Labor Market Holiday Fund is a major social tourism organization in Denmark. It is national, non-governmental institution funded by the state allowing its' citizens to enjoy tourism amenities. In initial stages of its development, the fund provided labor market with holiday vouchers per week. Thus each week workers of unions get a fixed amount of cheques and by the time the go on holidays the amount of received ones reach the amount of major vacations. So, the fund organizes the work of social organizations and tourist infrastructure to provide holidays for the youth and the third aged people and the financial support comes from the government.

Social tourism in Poland. Social tourism organizations undertake many initiatives supporting the participation in tourism and leisure of social groups with lower material status, taking special care of young and school children. Each year their activity



translates into different tourism and leisure events for the economically weakest social groups, mainly for young and school children. Also tourism entrepreneurs give discounts, even up to 20 %, for leisure organized by these organisations in the off-season period. Many other associations and foundations, which also promote tourism function and are being set up around the social tourism core (non-governmental tourism organizations). For many of them, it

is a supplementary activity. The dominant subgroups among them include organizations connected with religious or sport associations, and entities targeted for specified social groups. They try and organize leisure and tourism trips with the lowest possible costs for the selected recipients [4].

Social tourism is tourism that provides economic opportunities via travel and tourism for persons who are economically weak or otherwise disadvantaged [3].

**Table 2** – Description of social tourism models in different countries

Country	Organization	Target groups	Financial support	Organization model
The United Kingdom	Family holiday association, Family fund	Families and disabled children, senior citizens, single-parent families	Charity organizations, trust funds, individual donations	Adaptation model
Ireland	Sunshine holidays	Families, youth,	Charity organizations	
Russia	–	Disabled, Children, Youth, Chronically diseased people	Ministerial budgets, Regional governments	
Republic of Bashkortostan	State Programme	Pensioners, Disabled people, Orphans	Ministerial budgets, Regional governments	
Kazakhstan	Department Of The Committee Of Labour, Social Security And Migration By City Almaty	Disabled people, pensioners	The Ministry of Labour and Social Protection	
Belgium	Holiday participation centre	The underprivileged	Regional governments organization	Participation model
France	Cheques vacances	Children with long-term illnesses	Regional governments, unions and health and welfare organizations	Inclusion model
Poland	Labour market holiday fund	Children and youth	Ministerial budgets	
Denmark	Labour market holiday fund	Disabled people, the underprivileged single-parent families,	Regional governments, unions	
Spain	IMSERSO	Senior citizens	Regional governments, unions and health and welfare organizations	Stimulation model
Hungary	Calypso	Disabled people, Children and youth	Regional governments, unions	

In this interpretation social tourism initiatives are targeted to the increase of economic benefit of a host country. Thus the system allows for the disadvantaged group to participate in tourism activity and enjoy high standards in a particular period of time. By providing the destination with economic benefits

by an increase of the employment and sales. These types of initiatives will be referred to as the *stimulation model*. By attracting social tourism customers with specialized products during the shoulder season, a new market is created – initiatives of this type thus have economic as well as social benefits.

An example of such a scheme is the IMSERSO programme in Spain. It improves the quality of third aged people and address seasonality in the tourism sector. The programme provides older people with the opportunity to access holiday spells during the 'off season' in areas with a warm climate, undertaking cultural circuits and recreational activities through nature tourism. The programme is marketed through travel agencies by accredited companies following a tendering process. These agencies have equal access to a centralized computerized system, outlining the offers. Financed through contributions by beneficiaries and public monies, the State recoups its contribution through cost savings (savings in benefits and subsidies) and earnings (e.g. income tax from economic activity generated, Value Added Tax (VAT)), corporation tax, social security contributions). Because of the unique form of financing, which equally subsidizes all travelers rather than in proportion to the cost of the trip, the amount the State recoups in general exceeds the sum of its contribution [6].

Similar scheme model can be observed in Hungary as well. In the socialist era, social tourism took place mostly in mountain, lake-side or spa destinations, as a part of the social services supported by (state owned) companies and trade unions. The facilities, i.e. accommodation establishments of often low quality, were run by companies or trade unions. Employees, union members and their families were eligible to visit these premises. These trips were either free or heavily subsidized. Following the changes around 1990, the old support system collapsed. This system was replaced by the so-called supported holiday system. Social tourism establishments were either privatized or closed down. The role and power of trade unions diminished, the ministry's budget was cut and reorganized significantly. Organizations and companies allocated lower amounts for social benefits and gradually removed inherited obligations, i.e. social tourism. Social tourism has undergone significant changes in the last decade, leading to a wider scale of supported services as well as increased demand for such services. As a consequence, in 2010, the state has introduced new measures to regulate the market, the end results of which are unforeseeable yet.

Meanwhile, Social tourism in Brazil is run by government (EMBRATUR) and private organizations (SESC). First social tourism initiatives start 1975. In 2003 there started a deep consideration of social tourism and was found social tourism committee. So, here the scheme comprises target groups and social tourism infrastructure with discounted

prices in shoulder seasons. In the framework of social tourism, the government funds and sets up programs. The gist of the programs can vary according to some economic or political situations. For instance, the program in 2007 provided 50 % discounts for the elder citizens with 2000 hotels in 410 directions. In 2008 there was another program which provided trips for 600 students and teachers funded by the Ministry of tourism. In all, social tourism is run by governmental or non-governmental organizations with discounts.

Social tourism is tourism that is specifically designed for persons who are economically or otherwise disadvantaged [3].

This social tourism model is specifically designed for the social tourists target group. Tourist facilities, accommodation, transportation and other services are created especially for the aimed group and others have no access to this category of tourist product. Participation in this type of social tourism is limited to the targeted users. These types of initiatives will be referred to as the *adaptation model*.

An example of this form of social tourism is UK: Family Holiday Association. Established in 1975, the Family Holiday Association (FHA) is a charity organization that seeks to ensure the inclusion of families living on a low income in holiday and leisure activities. FHA provides financial assistance to families in need who have not had a holiday in at least 4 years. The organization relies entirely on voluntary donations and the number of holidays it can offer is restricted by the funds it raises [7]. Families are normally referred to FHA by social services, health authority staff and voluntary organizations. The FHA approach promotes the idea of the 'family holiday' as a tool or mechanism for combating social exclusion and seeks to contribute to the Government's work in preventing the social exclusion of families. Specifically it aims to strengthen the ability of families to cope with their difficulties, strengthen their capacity to participate in and contribute to their community, and develop a model of holiday provision to families under stress that can be replicated in other areas of the UK.

Social tourism in Russia, including its determination, is regulated by the federal law "About Bases of Tourist Activities in the Russian Federation" (with amendments of February 5, 2007). According to the law social tourism is "tourist activities", however, as of 2010, almost any corresponding regulation wasn't adopted that leads to the fact that the provisions of the law are considered by researchers as declarative [20]. Some territorial subjects of the Russian Federation, in particular Krasnodar Krai

and St. Petersburg, make attempts to regulate necessary conditions of development of social tourism: to establish regulations of a financial support, to determine the list of persons which can apply for partial settlement of tourist expenses. The state provides subsidies. On this money in regions programs of financing of social tours are developed (for example, on Kamchatka from 3 to 5 million rubles are annually allocated for the organization of social tours). Money is transferred to travel companies, and social rounds are distributed by the ministries connected with social security. Also the state periodically allocates grants for the organization of social tours (as a rule, the youth expeditions and children's tourism aimed at the organization).

Meanwhile, social tourism in Kazakhstan administered by state regulation of the social sphere of tourism which shall play not only a role of social compensation to the poor, but also to serve as certain compensation in recovery of health and in provision of various quotas in the sphere of tourism. In the developed economic and socio-political conditions, a role and value of system of social protection of the population significantly increased. Often bodies and organizations of social servicing are the unique structures, the appeal to which gives up to the person hope for receipt of support and the help in receipt of the help for a possibility of a travel. Social tourism is defined as "the travel subsidized from the funds allocated by the state for social needs" at the same time to separate categories of the Kazakhstan tourists the state provides privileges of social character [18]. As priority types of social tourism are allocated: for children and young people: amateur (sports); medical and improving; ecological and cultural and informative; family travel; tourism for youth and veterans; tourism for disabled people; tourist trips across Kazakhstan foreign compatriots, the international exchanges through social tourism. The system of social tourism in our state, assumes provision to separate categories of the population not only preferential vouchers, but also essential discounts in case of placement in hotel, catering services, also privileges for acquisition of tickets for different types of transport. Social tourism also extends to public servants, military and other categories of the population, priests receive grants for travel from the communities [17].

Social tourism in Bashkortostan is very developed. Executive of the programme: State committee of the Republic of Bashkortostan on business and tourism, Ministry of Labour and Social Protection of the population of the Republic of Bashkortostan and Ministry of Education of the Republic of Bash-

kortostan. Purpose of the social tourism activities: to increase the number of organized vacationers among separate categories of citizens, to provide accessibility of tourist services to separate categories of citizens (pensioners, disabled people, pupils of orphanages). The program provides implementation of actions for the following main directions:

1) provision of tourist services to pensioners and disabled people, including pensioners and disabled people with a certain level of the income, and also to disabled wheelchair invalids, visually impaired persons of the I group, handicapped children and the persons accompanying them on favorable terms.

2) the organization of tourist routes for pupils of orphanages of the Republic of Bashkortostan.

General control over the implementation of the system is exercised the executive in charge of the state program and bodies of the state financial control [19].

## Conclusion

The economic crisis is still affecting the demand for tourism services, but to a much lesser extent than many other industries. And this is due primarily to the fact that tourism has become almost essential need the mass consumer. Also the fact that the elasticity of demand and the diversity of forms of tourism offer in times of economic downturns the possibility of overflow of demand from costly types of tourism to cheaper.

Factors tourist market development, primarily related to the strengthening of the transformation processes in the society, internationalization, globalization, computerization of the tourism economy, new demands on human resources, environment, intercultural communication, as well as the emergence of new groups of consumers in the tourism market.

Currently, private organizations tourism sector get substantial profits, providing social benefits at its own expense. The benefit lies in the large flow of tourists social strata.

Aforementioned inclusion, adaptation, participation and stimulation models are the leading social tourism schemes that are managed by leading European countries. These models can act as a benchmark for Kazakhstan to follow in different stages of development. Even the European countries can not be coincided with Kazakhstani situation the tourism prerequisites can fit the situation under rigorous management.

The role and importance of social tourism in the current economic conditions of the Republic



of Kazakhstan has three positive aspects: first – the material support of the population, the second – thanks to the support, namely the established

benefits and discounts the development of social tourism, the third – the possibility of virtually all segments of the population to travel.

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