

**Національний університет фізичного виховання і спорту України**

**Кафедра туризму**

**EXCURSION SCIENCE**

**ЕКСКУРСОЛОГІЯ**

**ОПОРНИЙ КОНСПЕКТ ЛЕКЦІЙ**

для здобувачів другого (магістерського)

ступеня вищої освіти

за спеціальністю

242 Туризм

**Київ – 2019 р.**

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## МЕТОДИЧНІ РЕКОМЕНДАЦІЇ ЩОДО РОБОТИ З ОПОРНИМ КОНСПЕКТОМ ЛЕКЦІЙ

Опорний конспект лекцій з дисципліни «Екскурсологія» (Excursion Science) призначено для здобувачів другого (магістерського) рівня вищої освіти галузі знань 24 Сфера обслуговування спеціальності 242 Туризм.

Основна мета опорного конспекту лекцій – активізувати роботу студентів при вивченні дисципліни, підвищити якість сприйняття матеріалу лекцій, що викладаються англійською мовою. Опрацювання опорного конспекту упродовж лекційного заняття чи самостійної роботи також дозволить студентам:

- розвивати навички time management у процесі роботи з опорним конспектом;
- систематизувати отримані теоретичні знання та ілюструвати їх прикладами;
- набути навичок творчого та логічного мислення.

Опорний конспект лекцій містить 5 тем, що передбачено робочою програмою дисципліни. Його структура та зміст уможливають вивчення значного масиву інформації англійською мовою, скоротивши витрати навчального часу. На початку кожної теми наводиться план лекції, список ключових слів – термінів, які студенти мають засвоїти, а також список рекомендованої літератури для поглибленого вивчення матеріалу.

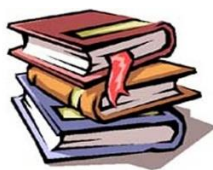
Студентам рекомендується занотовувати головні тези та пояснення викладача у спеціально відведених для цього місцях. Крім того, в опорному конспекті передбачено ведення студентами додаткових записів, коментарів, прикладів тощо.

Для контролю засвоєних знань наприкінці кожної лекції наводяться питання для самоперевірки.

Загалом, опорний конспект допоможе студентам розвивати професійне мислення, зосереджуючи увагу на сучасних проблемах та завданнях дисципліни.

## Позначення в Опорному конспекті лекцій

### Symbols Used in the Notes



Список рекомендованих джерел  
References



Термінологія  
Terminology



Занотуйте за лектором  
Note down by the lecturer



Додаткові нотатки за темою  
Additional Notes



Запитання для самопідготовки  
Self-Study Questions

# ТЕМА 1. ЕКСКУРСОЛОГІЯ – НАУКА У СИСТЕМІ СУЧАСНОЇ ТУРИЗМОЛОГІЇ

## Lecture 1. THEORY OF EXCURSION IN THE SYSTEM OF TOURISM SCIENCES

### Plan of the lecture

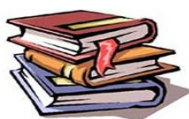
1.1. Basic concepts of the new discipline and their definitions.

1.2. History of excursion theory: main stages.

1.3. Methods of excursion science research.



*Science, theory, excursion, excursion functions, excursion method, classification of excursions, excursion service, excursion methodology and techniques.*



### **References:**

*1, 3, 5, 9.*

### **1.1. Basic concepts of the new discipline and their definitions**

Traditionally, the questions of the preparation and technique of making and delivering tours, organizing sightseeing, the content of the excursion were under the consideration in tourism business, that is, practice. At the same time little attention was paid to the theory of the excursion. The urgent problems of psychological foundation, terminology, methods and techniques of training guides, quality criteria of excursions were not investigated.

There are 2 words which can mean the same: *science, theory*.

The word “*science*” probably brings to mind many different pictures: a fat textbook, white lab coats and microscopes, an astronomer peering through a telescope, a naturalist in the rainforest, Einstein's equations scribbled on a

chalkboard, the launch of the space shuttle, bubbling beakers .... All of those images reflect some aspect of science, but none of them provides a full picture because science has so many facets:



*how you understand the following statements about science:*

- ✓ Science is both a body of knowledge and a process. \_\_\_\_\_  
\_\_\_\_\_
- ✓ Science is exciting. \_\_\_\_\_  
\_\_\_\_\_
- ✓ Science is useful. \_\_\_\_\_  
\_\_\_\_\_
- ✓ Science is ongoing. \_\_\_\_\_  
\_\_\_\_\_
- ✓ Science is a global human endeavor. \_\_\_\_\_  
\_\_\_\_\_.

To sum up, *science* comes from Latin word “*scientia*” meaning “*knowledge*”.



*what is science:*

*Science is* \_\_\_\_\_  
\_\_\_\_\_

Greek term for this phenomenon is “*logos*” meaning “*science*”. *Give 10 examples of the names of sciences which contain the Greek root “logos”.*

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Thus, a systematic enterprise that builds and organizes knowledge in the form of testable explanations and predictions about the universe is called \_\_\_\_\_.

Like the word “logos”, the term “*theory*” is of \_\_\_\_\_ (Latin /Greek/ French/ Arabic) origin and, generally, means observation, examination, and investigation.



***what other meanings this term has:***



- 1) \_\_\_\_\_  
\_\_\_\_\_
- 2) \_\_\_\_\_  
\_\_\_\_\_
- 3) \_\_\_\_\_  
\_\_\_\_\_
- 4) \_\_\_\_\_  
\_\_\_\_\_

The term "*excursion*" means \_\_\_\_\_  
\_\_\_\_\_

If to combine 2 terms together into 1,



***what a new term means:***

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_

For tourism industry employees, the excursion theory is \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The excursion theory has a set of basic concepts: *excursion functions, excursion method, classification of excursions, excursion service, excursion methodology and techniques.*

***Which term suits best to the definitions given below?***

	Technique of educating excursionists on the route
	A means of delivering a customer a combination of intangible things such as: information and observation of tourist attractions, care, good mood, etc.
	Systematic arrangement of excursions in certain groups according to the established criteria
	A system of methods used in the excursion activity
	The purposes excursions are used to achieve

**1.2. History of excursion theory: main stages**



*the main stages of excursion theory (ET) development in the chronological table below:*

<b>Date</b>	<b>Facts</b>


### ***Conclusion***

ET is a set of views, ideas, positions which create the basis of the tour business in the country. ET is most fully and definitely reflected through excursion. Excursion is a complex discipline exposing the theory, methodology and techniques of excursion activities, the history of tour business and generalizes the practice of travel agencies and excursion agencies.

### ***Additional Notes***



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### *Self-Study Questions*



1. The concept of “theory”.
2. Excursion as a science.
3. The role of practice in ET
4. The main steps in the history of ET.
5. Contribution of tourism researchers into ET.
6. ET at present.
7. The activity of the League of Excursion Conductors.

## ТЕМА 2. ЕКСКУРСІЯ/ТУР, ЇХ СУТНІСТЬ

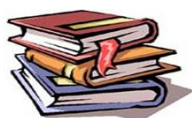
### Lecture 2. EXCURSION/TOUR, THEIR ESSENCE

#### Plan of the lecture

- 2.1. Tour and its synonyms, and essence of the terms.
- 2.2. The fundamental elements of the excursion/tour.
- 2.3. A guide and his/her responsibilities.
- 2.4. The first stage of the excursion where narration dominates.
- 2.5. The second stage where narration and demonstration are equal.
- 2.6. The third stage of the excursion where demonstration prevails over narration.



*Tour, excursion, guide, guide's responsibilities, narration, demonstration, combination of fundamental excursion elements.*



#### **References:**

2, 3, 4, 6.

#### **2.1. Tour and its synonyms, and essence of the terms.**

The word “*tour*” is derived from the Latin word “*excursion*”. The word penetrated into the Russian language in the XIX century and originally meant “running out, a military incursion” and later it began to mean “*a ride*”.



***Note down by the lecturer to have a complete statement:***

Originally, a tour was \_\_\_\_\_

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*Then* the task was \_\_\_\_\_

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*Finally*, the search for new forms and objectives made a trip \_\_\_\_\_

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**Differences in meaning of the synonyms.**



*the definitions from dictionary what the following terms mean:*

**Excursion** \_\_\_\_\_

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**Tour** \_\_\_\_\_

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**Trip** \_\_\_\_\_

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**Journey** \_\_\_\_\_

---

**Itinerary** \_\_\_\_\_

---

**Crossing** \_\_\_\_\_

---

**Flight** \_\_\_\_\_

---

**Voyage** \_\_\_\_\_

---

**Route** \_\_\_\_\_

---

Currently, a tour is smth complete, integrated which has its own specific features and characteristics and peculiar individual methods.

So the tour is a tangible process of man's knowledge of the world, built on a pre-selected objects in the natural environment or located on the premises of enterprises, laboratories, research institutes, etc.

## 2.2. The fundamental elements of the excursion/tour

The excursion/tour is a \_\_\_\_\_ process of man's knowledge of the world, built on \_\_\_\_\_

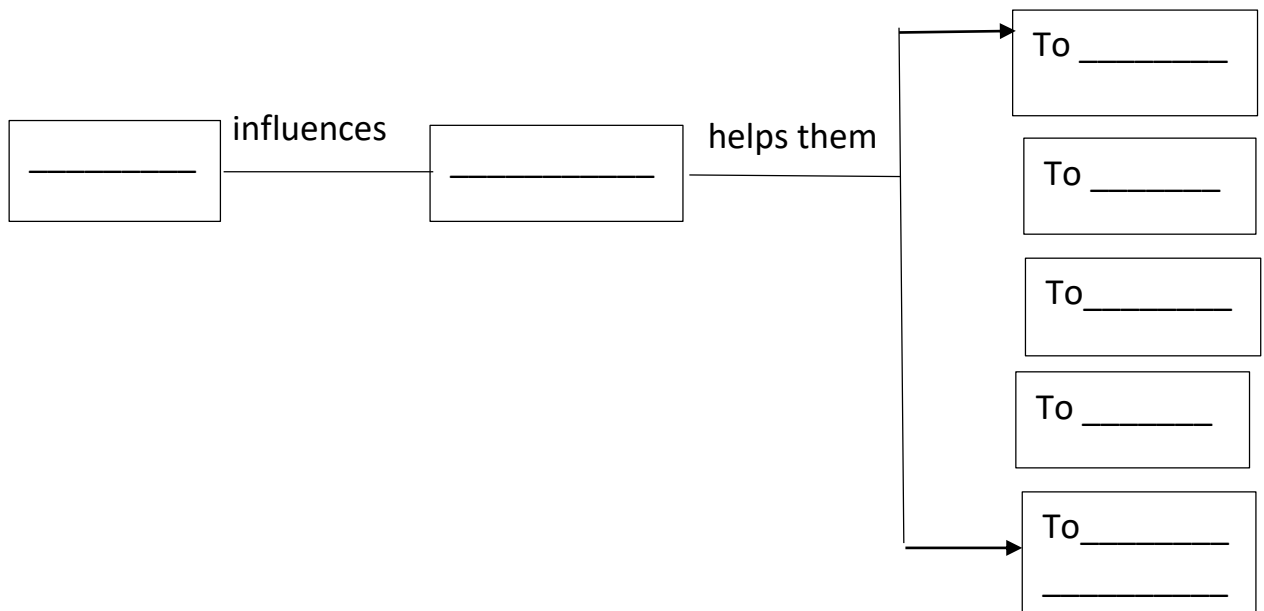
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It is the purposeful process based on the combination of visual, auditory and other impressions.



*how the interaction between a guide and an excursionist takes place:*





***the summary of the tasks of the guide during the excursion/tour:***

During the excursion/tour, the guide helps tourists to \_\_\_\_\_ on the basis of which the topic (***the first task***) is revealed, to \_\_\_\_\_ the necessary information about them (***the second task***), to \_\_\_\_\_ the significance of the historical event (***the third task***), to \_\_\_\_\_ of independent conclusions, observation and \_\_\_\_\_ objects (***the fourth and fifth tasks***). The outstanding Ukrainian teacher S.F. Rusova defined the purpose of excursions: "... Excursions teach not only to look around, but also to see all objects and phenomena in all details, and to understand their connections with each other, and their connection with the sphere in which they were formed".

**2.3. A guide and his/her responsibilities**



***the missed information:***

Displaying objects is the \_\_\_\_\_ of a qualified person - a \_\_\_\_\_. The process of objects perception by \_\_\_\_\_ is subordinated to the task of disclosing certain topics. The guide sends the \_\_\_\_\_ vision of the object, \_\_\_\_\_ of the memorial site, \_\_\_\_\_ of historical events related to the object. He is not indifferent to what \_\_\_\_\_, as he should understand and accept what they saw and heard. He brings his \_\_\_\_\_ to \_\_\_\_\_, making them do their conclusions and estimation, and thereby he \_\_\_\_\_.

**2.4 . The first stage of the excursion where narration dominates**

The fundamentals of any excursion/ tour is the availability of **2 main elements:**

- \_\_\_\_\_;
- \_\_\_\_\_.




There may be such combinations:

- \_\_\_\_\_ (N>D);
- \_\_\_\_\_ (N=D);
- \_\_\_\_\_ (D<N).



*a list of the main features of the excursion N>D:*

<b>The first stage</b> <b>N&gt;D</b>   <small>VectorStock® VectorStock.com/19578960</small>	

### 2.5. The second stage where narration and demonstration are equal



*a list of the main features of the excursion N=D:*

<b>The second stage</b> <b>N = D</b>	




**2.6. The third stage of the excursion where demonstration prevails over narration**



*a list of the main features of the excursion  $D > N$ :*

**The third stage**  
 **$D > N$**


***Conclusion***

Quantitatively, the \_\_\_\_\_(D) and the \_\_\_\_\_(N) in excursions are changing all the time. Their combinations depend, first of all, on:

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***Additional Notes:***

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***Self-Study Questions***



1. The origin of the word “tour/excursion”.
2. What does the term “tour” denote nowadays?
3. What is the guide’s task?
4. What are 2 elements of the excursion/tour?
5. What combinations of narration and demonstration do you know?
6. The first stage of the excursion (D>N).
7. The second stage of the excursion (D=N).
8. The third stage of the excursion (N>D).
9. Balance between the excursion elements.

## Lecture 3. EXCURSION/TOUR, THEIR ESSENCE

### Plan of the lecture

- 3.1. Tour as an activity.
- 3.2. Tour as a communication.
- 3.3. Roles a guide can play during the excursion.
- 3.4. Roles of excursionists during the excursion/tour.
- 3.5. Excursion in a practical sense.



*Tour, excursion, excursion as an activity, excursion as a communication, roles of the guide, roles of the excursionists, practice of excursions.*



### **References:**

2, 4, 6.

### **3.1. Tour as an Activity**

Tour comprises an amount of interrelated and interdependent actions. These actions are diverse:

- the movement on the \_\_\_\_\_,
- the movement of \_\_\_\_\_ related to their walk,
- \_\_\_\_\_ included in the route notes.

Guide's tips make actions meaningful and purposeful for tourists.

**Actions during tours are divided into two parts:**



*Note down by the lecturer.*

Activities of the guide	Activities of tourists
-	-
-	-
-	-
-	-

### 3.2. Tour as a Communication

The term “*communication*” is seen as “the mutual relations, business or friendly relationship”.

More commonly, “*communication*” is defined in dictionaries as

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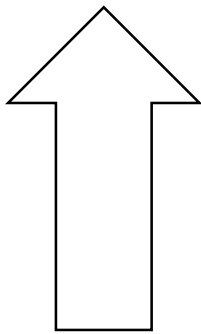


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In practice, people have two kinds of communication – direct and indirect.



*what forms the communication has:*



**Direct  
Communication:** \_\_\_\_\_

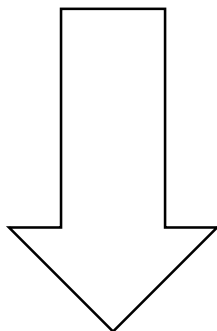
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**Indirect  
Communication:** \_\_\_\_\_

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Tour as a form of direct communication involves

\_\_\_\_\_:

- \_\_\_\_\_

- \_\_\_\_\_ on the basis of their joint activities. As a specific form of communication, a tour enables millions of people to get a significant amount of information, shaping the way to mental activity.

Basic knowledge of \_\_\_\_\_ and \_\_\_\_\_ helps a tour guide to organize the excursion. Practical communication is the communicative phase in the activity of every guide.

Properly organized communication between a guide and tourists is the basis of the educational process of a tour. Communicative component is an important part of guide's professional skills. Efficient excursion guides demonstrate not only:

- \_\_\_\_\_;

- \_\_\_\_\_;

but also:

\_\_\_\_\_.

### 3.3. Roles a guide can play during the excursion

During the excursion a guide plays different roles and uses a variety of options to increase the activity of tourists.



*what roles a guide plays during the excursion:*

A guide can be		
_____	_____	_____

### 3.4. Roles of excursionists during the excursion/tour

During the excursion excursionists play different roles depending on their activity.



*what roles excursionists can play during the excursion:*

Excursionists can be			
_____	_____	_____	_____

### 3.5. Excursion in a practical sense

In practice, excursions are seen in several aspects:



*what aspects excursions are seen in:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_

### ***Conclusion***

Thus, a tour can be seen as: an activity and communication.

The activity involves the actions of a \_\_\_\_\_ and \_\_\_\_\_.

Communication has 2 forms: \_\_\_\_\_ and \_\_\_\_\_.

A guide plays 3 roles: \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_.

During the excursion an excursionist plays the roles of: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.



### ***Additional Notes:***

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## *Self-Study Questions*



1. Tour as an activity.
2. Tour as a communication.
3. Types of communication and their characteristics.
4. Different roles and options the guide uses.
5. Different roles of excursionists during the excursion.
6. How are excursions understood in practice?

## Lecture 4. FUNCTIONS AND FEATURES OF EXCURSION/TOUR

### Plan of the lecture

1. Notion of function.
2. Informative and scientific functions.
3. Ideological function.
4. Educational and cultural functions.
5. Entertaining function and shaping human interest function.
6. Common features of excursion/tour.
7. Specific signs of excursion/tour.
8. “Gidizm” phenomenon.



*Function, informative function, scientific function, ideology, ideological function, educational function, cultural function, leisure, entertaining function, shaping human interest function, signs, features, common signs, specific signs, gidizm.*



### **References:**

*1, 3, 5, 9.*

### **4.1. Notion of function**

**Function** (*as a concept*), translated from Latin means “*execution, carrying out*”. Function is the outward \_\_\_\_\_ of an object, the form of institutions and enterprises. The main properties of any object are realized \_\_\_\_\_. That’s why the main functions of excursions are considered to be its main properties: informative, scientific, ideological, educational, upbringing, human and cultural.



*some definitions of the concept “function”:*

**Function** is \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### **4.2. Informative function**



*what informative and scientific functions of excursion/ tour mean:*

Informative function \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Scientific function \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### **4.3. Ideological function**



*what ideology is and how excursion/tour can perform the ideological function:*

Ideology is \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### 4.4. Educational and cultural functions



*what educational function of excursion/ tour is:*

Educational function of excursion/ tour means that \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



*what cultural function of excursion/ tour is:*

Cultural function of excursion/ tour is \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### 4.5. Entertaining function and shaping human interest function



*what leisure is;*

*what thematically integrated and methodologically parts excursion/tour has:*

*Leisure* means \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Excursion is a synthesis of several forms of cultural and educational work. In addition to the oral representation of the material, it also represents thematically integrated and methodologically substantiated parts which can include:

a) \_\_\_\_\_  
\_\_\_\_\_;

b) \_\_\_\_\_  
\_\_\_\_\_;

c) \_\_\_\_\_  
\_\_\_\_\_;

d) \_\_\_\_\_  
\_\_\_\_\_;

e) \_\_\_\_\_  
\_\_\_\_\_.



*what function of shaping human interest of excursion/ tour means:*

The aim of the excursion is to \_\_\_\_\_ and stimulate \_\_\_\_\_ in a particular field of knowledge. Having been on the literary tours, participants are showing further interest to \_\_\_\_\_. Participants in these tours in the future will \_\_\_\_\_ on

the fine arts, creative writing, will visit museums and other \_\_\_\_\_  
 \_\_\_\_\_. Tour for many is the beginning of  
 self-education.

#### 4.6. Common features of excursion/tour



*what a sign (feature) is:*

A sign means \_\_\_\_\_  
 which makes object or phenomenon \_\_\_\_\_ or \_\_\_\_\_  
 from the others. So, it refers the essential characteristics, i.e. those without which an  
 object, phenomenon, a form of cultural and educational work cannot exist. A sign  
 taken separately or even \_\_\_\_\_ together makes it  
 possible to \_\_\_\_\_.

Excursion like other forms of cultural and educational work ( \_\_\_\_\_  
 \_\_\_\_\_ )  
 has its own characteristics in the organization and in its conducting.

A typical city or suburban excursion has 7 typical indicators or signs which  
 reflect their *common signs* and at the same time distinguish them from other types.



*what common signs (features) an excursion/ tour can  
 have:*

No	Common Signs	Notes
1.		
2.		
3.		

4.		
5.		
6.		
7.		

#### 4.7. Specific signs of excursion/tour

In addition to the common indicators, each excursion/ tour has also its *specific signs (features)*:



*what specific characteristics an excursion/ tour can have. Match the type of excursion/tour and specific signs:*

<i>A bus excursion/tour</i>	getting acquainted with the exhibits and learning the materials on the stands and walls. In this case materials and exhibits are taken as if the guide's visual materials from his/her "excursion bag" but enormously increased
<i>A museum excursion/tour</i>	instead of short logical link from one event to another, the guide presents more detailed information on the events
<i>A walking excursion/tour</i>	getting off the bus for a mandatory inspection of the site, attraction

Without these features at least one, the excursion loses its effectiveness and can be understood as haphazard sightseeing of places, monuments, buildings of history and culture.

#### **4.8. “Gidizm” phenomenon**

In case of haphazard sightseeing of places, monuments, buildings of history and culture, the excursion stops being an excursion in the true meaning of the word. Moving from one attraction to another, without any system, without logical links in presenting the necessary information, ruining the logics of historic events and other negative features have got a special term in the excursion science – “\_\_\_\_\_”.

Scientists have been much troubled about these \_\_\_\_\_ signs since the rise of tourism business. They consider “gidizm” the worst enemy of tour business. The question how to \_\_\_\_\_ is being widely discussed by the scientists who are of the opinion that only revealing and opening of the theme connected with the visual objects can be considered a \_\_\_\_\_, in contrast to the simple display of objects in the order of their appearance before the eyes of tourists.

#### ***Conclusion***

To conclude, it should be said that the excursion combines in itself a variety of functions. In addition, its functions also depend on the \_\_\_\_\_. For children and young people the excursion is a tool of \_\_\_\_\_, \_\_\_\_\_, for teens who choose a profession, it has \_\_\_\_\_, for foreign tourists it performs the \_\_\_\_\_, etc.



*Additional Notes:*



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*Self-Study Questions*



1. The notion of a “function”.
2. The functions of the excursion.
3. The excursion as a synthesis of speech and other thematically integrated parts.
4. The notion of a “sign/indicator”.
5. Common indicators of a typical city or suburban excursion.
6. Specific signs.
7. The notion of “gidism”.
8. Recommendations how to prevent negative features of “gidizm”.

## ТЕМА 3. ІСТОРИЯ РОЗВИТКУ ЕКСКУРСІЙНОЇ НАУКИ В УКРАЇНІ

### Lecture 5. DEVELOPMENT STAGES OF EXCURSION SCIENCE IN UKRAINE

#### Plan of the lecture

- 5.1. Different approaches to the history of excursion science.
- 5.2. The first/second/third stage of excursion science development in Ukraine.
- 5.3. Types of excursions used in the past.
- 5.4. Achievements of excursion science.



*Development of excursion science, stages of the development, common types of the excursions, clubs, organizations, unions and their excursion activity, main achievements of Ukrainian scientists.*



#### **References:**

1, 4, 5, 6.

#### **5.1. Different approaches to the history of excursion science**

The history of excursion theory and practice in Ukraine goes back to the \_\_\_\_\_ century and it is a part of Ukrainian history of culture in general.

There are different systems of dividing the excursion science evolution into stages. The most common approach was worked out by native scientists

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According to it, there are \_\_\_\_\_ stages in the development of science theory in Ukraine.



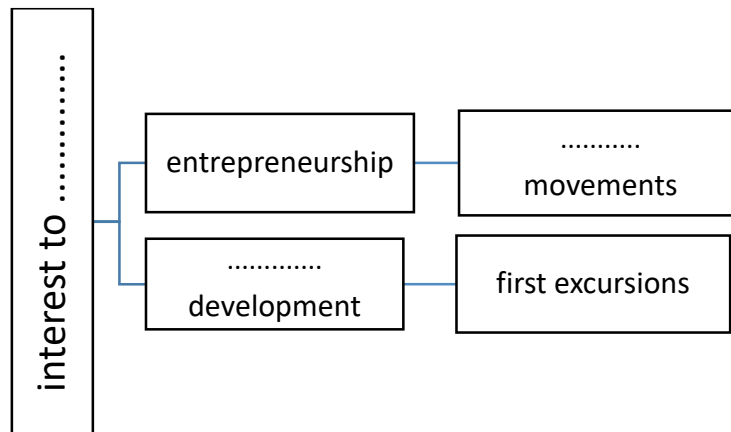
*what are the time limits of the development stages:*

<b>The first stage</b>	
<b>The second stage</b>	
<b>The third stage</b>	
<b>The fourth stage</b>	
<b>The fifth stage</b>	
<b>The sixth stage</b>	
<b>The seventh stage</b>	
<b>The eighth stage</b>	
<b>The ninth stage</b>	

### 5.2. The first stage



*what pre-conditions caused the excursion experience*



Some recommendations how to organize and conduct excursions were reflected in:

\_\_\_\_\_ (\_\_\_\_\_ year);

\_\_\_\_\_ (\_\_\_\_\_ year).

**The second stage:**



***how is this period of excursion science characterized:***

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**The third stage:**



***what organizations were responsible for conducting excursions at this period; a short description of their activity:***

Name of the organization	Description of the activity	Figures, dates, places
A Society of Amateurs of Nature, Mountain Sport and the Crimean Mountains	doctor V.Dmitriev conducted field trips and walked along the whole peninsula.	the 80-ies of the 19 <sup>th</sup> century; Yalta


### 5.3 Types of excursions in the past



*information in the table below:*

<i>Type of the excursion</i>	<i>Specific features</i>	<i>Statistics</i>
<i>Field</i>		
<i>Historic</i>		
<i>Religious</i>		
<i>Literary and art</i>		
<i>Industrial</i>		

<i>Museum</i>		
<i>River</i>		

During this period the theoretical grounds were worked out for conducting the above-mentioned excursions. They were published in specialized manuals:

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#### **5.4. Main achievements of excursion science at those times.**



*what achievements were made by Ukrainian scientists in the excursion science:*

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#### ***Conclusion***

Thus, the first, second and third stages of the excursion science development can be considered favourable for creating the necessary conditions to develop a successful excursion theory and practice in Ukraine. The common types of the excursions in that period were:\_\_\_\_\_

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The famous Ukrainian scientists, scholars and teachers made a great contribution to the development of excursion science:\_\_\_\_\_



***Additional Notes:***

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***Self-Study Questions***



1. Native excursion scientists and their development classifications.
2. The first stage of excursion science development, short characteristics.
3. The second stage of excursion evolution and its peculiarities.
4. The third stage and its main features.
5. Popular excursion clubs and their activity.
6. Types of excursions at that time.
7. Main achievements of excursion science.

## Lecture 6. DEVELOPMENT STAGES OF EXCURSION SCIENCE IN UKRAINE

### Plan of the lecture

- 6.1. The fourth stage of excursion science development.
- 6.2. The fifth stage and its main features.
- 6.3. The sixth stage and their characteristics.
- 6.4. The seventh stage and its peculiarities.
- 6.5. The eighth stage of excursion science history.
- 6.6. Current state of excursion science in Ukraine.



*Golden period, promote tourism, Suputnyk, Inturist, local representatives of the main drivers, thematic directions of the excursions, State Committee of Tourism in Ukraine, innovations in excursion theory and practice.*



### **References:**

1, 3, 4, 5, 6.

### **6.1. The fourth stage of excursion science development**

Some scientists call these years “*the Golden period of excursion development*” because \_\_\_\_\_

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*what peculiar features are typical to this period of excursion science developments:*

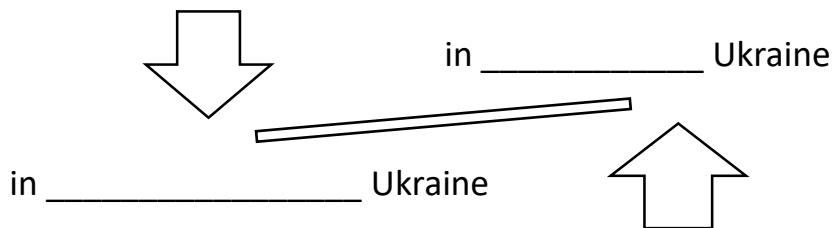


<b>1919</b>	
<b>1920-ies</b>	
<b>1921</b>	
<b>1924</b>	
<b>1923-1925</b>	

### 6.2. The fifth stage



- *what two ways of excursion science was developing in;*
- *a short description of achievements in both columns:*




### 6.3. The sixth stage



*what themes dominated in excursions on that stage of excursion theory and practice development:*

The thematic orientation of excursion was the following:

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The main driving forces which encouraged and extended the variety of excursions were:

- Sputnik, the organization that \_\_\_\_\_  
\_\_\_\_\_;
- Intourist, the organization \_\_\_\_\_  
\_\_\_\_\_;
- Palaces of Pioneers \_\_\_\_\_  
\_\_\_\_\_;
- Trade Unions \_\_\_\_\_  
\_\_\_\_\_.

To meet the highest demands of the excursion content a great methodological job was done: \_\_\_\_\_-books published; recommendations \_\_\_\_\_ worked out, \_\_\_\_\_ of excursions compiled, various \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ organized.

#### 6.4. The seventh stage



*what themes were touched in the excursions;  
what tourist and excursion organizations promoted tourism in Ukraine.*

Thematic directions of excursions were: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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The organizations which promoted tourism at that time were:

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Some figures, dates related to the development of excursion science:

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### 6.5. The eighth stage



*what themes were touched in the excursions;*

*what tourist and excursion organizations promoted tourism in Ukraine.*

Thematic directions of excursions were: \_\_\_\_\_

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The organizations which promoted tourism at that time were:

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Some figures, dates related to the development of excursion science:

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### 6.6. Current stage



- *tourist structures that actively promoted tourism and excursions;*
- *innovations in the excursion science.*

Tourist structures that actively promoted tourism and excursions	Innovations introduced into the excursion science

### *Conclusion*

To conclude, all stages of excursion science can be characterized by the following:

- \_\_\_\_\_directions of excursions;
- the availability of \_\_\_\_\_ and \_\_\_\_\_organizations that promoted tourism and its methodological fundamentals;
- some prominent \_\_\_\_\_, facts and \_\_\_\_\_on the development of tourism in Ukraine.



### *Additional Notes:*

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### *Self-Study Questions*



1. What organizations promoted excursion science in Ukraine in the post-war period?
2. What tourists were Suputnyk and Inturist serving?
3. How was methodological basis of excursions formed at this time?
4. The fourth stage of excursion science development, short characteristics.
5. The fifth stage of excursion evolution and its peculiarities.
6. The sixth stage and its main features.
7. The seventh stage and its short description.
8. The eighth stage of excursion science development.
9. Current situation with the excursion science.

## ТЕМА 4. КЛАСИФІКАЦІЯ ЕКСКУРСІЙ

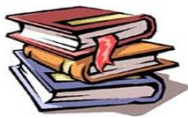
### Lecture 7. CLASSIFICATIONS OF EXCURSIONS

#### Plan of the lecture

- 7.1. The concept of classification. The first attempts of classifying excursions.
- 7.2. Criteria of classifying excursions.
- 7.3. Classification according to the content: sightseeing and thematic.
- 7.4. Classification according to the participants' characteristics.



*Classification of excursions, criteria of classification, content, sightseeing tours, thematic excursions, historical excursions, religious excursions, arts excursions, literature excursions, architectural excursions, nature excursions, industrial excursions, participants characteristics.*



#### **References:**

1, 3, 4, 6.

#### **7.1. The concept of classification. The first attempts of classifying excursions**

Classification is \_\_\_\_\_

The designation of excursions has always been the focus of tourism professionals, travel and excursion scientists. The first attempt to do this refers to \_\_\_\_\_ (time?). The travel scientist V.A.Gerd classified excursions into some groups and subgroups according to \_\_\_\_\_.

## 7.2. Criteria of classifying excursions



*what criteria can be used to classify excursions:*

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## 7.3. Classification according to the content

According to the content, all excursions can be broken down into two groups:

\_\_\_\_\_ and \_\_\_\_\_.



*short characteristics of both groups of excursions:*

<i>Sightseeing excursions</i> have the following characteristics:
✓
✓
✓
✓
✓

**Thematic excursions** are divided into two groups as well:

- overview thematic or sightseeing thematic:
- advanced thematic.

The first group has some common features with the sightseeing excursions.



***what similar features thematic and sightseeing excursions have:***

The thematic excursion is devoted to \_\_\_\_\_, like the sightseeing tour, then it can be constructed on the basis of one or more events (\_\_\_\_\_). Being united by one theme, it can \_\_\_\_\_. If this is the tour to the architectural attractions, a subject of study may be the most interesting pieces of architecture, \_\_\_\_\_ in the streets and squares of the city because the City represents architectural ensembles of the past centuries.

**Thematic excursions** are divided into:




***the main features of thematic excursions:***

The main features of thematic excursions are:
✓
✓



✓
✓
✓



- *what types of historic excursions are divided into;*
- *examples of the mentioned excursions:*

Type of historic excursions	Examples
<b>Local</b> _____	
<b>Ar</b> _____	
<b>Eth</b> _____	
<b>Historical and</b> _____	
<b>Historical and</b> _____	
<b>Excursions to</b> _____ <b>museums</b>	

**Religious** excursions are placed into three groups:

<b>Types of religious excursions</b>	<b>Examples</b>



*- what subgroups arts excursions have:*



- *what types of literature excursions they are:*

*Literature excursions* are the following:

Explanation	Type
They reveal certain periods in the Ukrainian national literature (e.g. Literary Kyiv, Writers of the 20 <sup>th</sup> century in Kyiv);	
They are held in places connected with the life and work of writers, poets, playwrights, etc. (e.g. “Our Lesia” (to Novograd-Volynskyi); “T.Shenchenko in Kyiv”);	
They are connected with the life of the literature heroes (Favourite Heroes of the Childhood (after the stories by V.Katayev, Odesa; The Crimea in Fairy Tales and Legends); They depict places in the works by famous writers, poets (Kyiv in Bulgakov’s” Life and Work”);	
They are connected with the acquaintance of some cultural attraction only through the literary fiction heroes;	
They are based on the material from fiction works.	

The purposes of *architectural excursions* are to show architectural structures of the city, to display the architectural monuments of a certain historic period, to give tourists an idea of an architect’s work, to show examples of modern architecture, etc. Accordingly, there are such types of architectural excursions:

\_\_\_\_\_;

\_\_\_\_\_;

\_\_\_\_\_.

*Nature excursions* can be created and held practically in any place. Tourist get acquainted with the nature of their home land, climatic conditions, flora and fauna, landscapes etc. Their purpose is to teach tourists to establish friendly relations with nature. The most typical excursions of this class are:

- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_.

In general, nature excursions can be called *ecological*, because they \_\_\_\_\_.

Ukraine has a great potential to conduct such excursions. It should be noted that there are \_\_\_\_\_ National parks in Ukraine, \_\_\_\_\_ Natural Preserves, \_\_\_\_\_ Bio-Spheric Preserves.

On these excursions tourists go along the defined ecological paths in the parks and preserves and watch natural and cultural sights, admire the landscapes, etc. among the ecological excursions one should identify 4 subgroups:

- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_.

*Industrial (production or factory) excursions* should develop the extension of labour experience of tourists, formation of skills, get acquainted them with different professions and vocations. The subgroups of this class are:

- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;

- \_\_\_\_\_;
- \_\_\_\_\_.

To sum up, *the excursion classification according to the content*, is very conditional. Types of excursions \_\_\_\_\_ exist in isolation from each other. For example, the \_\_\_\_\_ material is used in tours to architectural and urban attractions, elements of \_\_\_\_\_ find a place in almost every group and subgroup of thematic excursions. Everything depends on the specific conditions of the tour, on the resources, on the cognitive plan of getting acquainted with a city or region.

#### 7.4. Classification according to the participants' characteristics



*the characteristics according to which excursions can be classified:*

According to the participants' characteristics the excursions can be individual or group, for adults or children, etc. The characteristics can include:

Criteria	Description of the participants
Age categories	
	domestic and foreign tourists, cruise passengers, random structure of the group
Place of residence of travellers	
Social status, the place of job	
Individual or group _____ _____	excursionists

***Conclusion***

Thus, an excursion/ tour can be classified according to \_\_\_\_\_

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The most common classification is according to \_\_\_\_\_.

The excursions are of 2 types: \_\_\_\_\_ tours and \_\_\_\_\_ excursions. The latter are divided into 2 groups as well: \_\_\_\_\_

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The following types of excursions are considered thematic ones: \_\_\_\_\_

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***Additional Notes:***

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### *Self-Study Questions*



1. The concept of classification. The first attempts of classifying excursions.
2. Criteria of classifying excursions.
3. Classification according to the content.
4. Sightseeing tours and their short characteristics.
5. Thematic excursions and their types.
6. Common features of sightseeing tours and thematic excursions.
7. Historical excursions and their examples on local material.
8. Religious excursions and their examples on local material.
9. Art excursions and their examples on local material.
10. Literature excursions and their examples on local material.
11. Architectural excursions and their examples on local material.
12. Nature excursions and their examples on local material.
13. Industrial (production or factory) excursions and their examples on local material.
14. Classification according to the participants' characteristics.

## Lecture 8. CLASSIFICATIONS OF EXCURSIONS

### Plan of the lecture

- 8.1. Classification according to the place of conducting excursions.
- 8.2. Classification according to the mode of transportation.
- 8.3. Classification according to the form of conducting excursions.
- 8.4. Classification according to the rhythm and frequency.
- 8.5. Classification of excursions/ tours according to their aim, tasks and form of conducting.



*Conducting an excursion, mode of transportation, form of the excursion, frequency, aim of the excursion, task of the excursion.*



### **References:**


1, 2, 3, 6.

### 8.1. Classification according to the place of conducting excursions



*what types of excursions are distinguished according to the place of their conducting;*

*their short characteristics:*



## 8.2. Classification according to the mode of transportation

Another criterion is *the mode of transportation (movement)*. According to it the excursions are divided into:

- \_\_\_\_\_;
- \_\_\_\_\_.



*advantages and disadvantages of every mode of transport in relation to conducting the excursions:*

Mode of transport	Advantages	Disadvantages


### 8.3. Classification according to the form of conducting excursions

According to the form of conducting there are such types of tours as: ordinary (traditional) excursions; educating excursions; excursions for groups (mass-sized); walking excursions; concert and performance excursions; testing and quest ones.



*short description of the following types of excursions:*

Type of excursion	Description
Ordinary (traditional) excursions	
Educating excursions	
Excursions for groups (mass-sized)	
Walking excursions	
Concert and performance excursions	

Testing excursions and quests	
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#### 8.4. Classification according to the rhythm and frequency

According to the rhythm and frequency, tours can be single and repeated, i.e. a set of excursions united with one theme – history, literature, architecture, etc. The latter are created and held in the cities with great excursion potential: Kyiv, Lviv, Odesa etc.



*examples of single excursions and a set of them in your native city, town, village:*




Type of excursion	Example
Single excursions	
A set of excursions	



#### 8.5. Classification of excursions/ tours according to their aim, tasks and form of conducting



*missed information into the blocks of the table below:*

Aim	Tasks	Forms of conducting
Rest	- -	

	- -	
_____	- Learning the material in such school subjects as history, geography, botany, zoology etc.;	<p>Activities _____</p>  <p>For _____</p> 
Testing	- -	For _____
_____ (a form of education)	- -	For special audience
_____	Dissemination of scientific knowledge, ideas, theories among the specialists of some branches	
General educational	-	Overview multi-faceted, road excursion information

	-	
_____	-	Thematic excursion
_____	-	
_____	- Organizing leisure with game elements, spectacular and entertaining events, using the live exhibits during the excursion	 <hr/>
(cultural and entertainment)		
advertisement	-	 <hr/>

***Conclusion***

Thus, detailed attention to the classification is caused by the necessity of tour operators and travel agencies to better arrange the guides' activity; to systemize a wide range of various tours according to some criteria. They are: \_\_\_\_\_

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***Additional Notes:***

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### *Self-Study Questions*



1. How are tours classified by their venue of conducting?
2. The mode of transportation (movement) and its influence on the type of excursion.
3. What is a set of excursions and their main features?
4. What is the aim and tasks of educational excursions?
5. What is the aim and tasks of testing (controlling) excursions?
6. What is the aim and tasks of scientific excursions?
7. Why is it necessary to prepare road excursion information?
8. The aim and tasks of cultural and educational excursions.
9. What does animation include in relation to excursions?
10. In what case can advertisement be considered an excursion or tour?
11. What is the classification of excursions important for?

## ТЕМА 5. ОСНОВНІ ЕТАПИ СТВОРЕННЯ ЕКСКУРСІЙОГО ПРОДУКТУ

### Lecture 9. THE MAIN STEPS IN CREATING AN EXCURSION PRODUCT

#### Plan of the lecture

- 9.1. The design of an excursion.
- 9.2. Excursion technological process.
- 9.3. Preparation work.
- 9.4. Excursion creation.
- 9.5. Constructing excursion itinerary.



*Technological process, excursion design, preparation of the excursion, stages of creating the excursion, excursion aim, task, theme, name, attractions, excursion objects, technological documentation, itinerary, ways of constructing the excursion itinerary.*



#### **References:**

1, 4, 6.

#### **9.1. The design of an excursion**



*what technological processes in excursion science are::*

Technological processes in excursion science are the processes of \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ materials for the excursion and also the combination of \_\_\_\_\_ and ways of teaching future \_\_\_\_\_.

According to the Standards of Tourist and Excursion Service the design of an excursion includes identifying:

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## 9.2. Excursion technological process



*what components excursion technological process consists of:*

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In general, the technological process of creating a new excursion consists of 15 stages:

	Identifying the goal and objectives of the excursion.	
		Вибір теми
	Resources overview (literature, archive materials).	



		Знайомство з музейними експозиціями та фондами
		Відбір та вивчення об'єктів
	Making an itinerary of the excursion.	
	Familiarizing with the itinerary.	
		Підготовка контрольного тексту
	Making an excursion guide's portfolio.	
	Choosing adequate methods of conducting the excursion.	
		Визначення техніки проведення екскурсії
	Preparing a technological map.	
		Підготовка індивідуального тексту
	Passing the excursion	
		Затвердження пакету екскурсійно-методичної документації

All these steps of creating an excursion can be grouped into 3 categories:

**Preparation stage** \_\_\_\_\_  
\_\_\_\_\_;

**Excursion creation** \_\_\_\_\_  
\_\_\_\_\_;

**Final stage** \_\_\_\_\_  
\_\_\_\_\_.

### 9.3. Preparation stage



*short characteristics of the following:*

The aim of the excursion	
The task of the excursion	
The theme of the excursion	
The name of the excursion	
Excursion objects	



*classification of excursion objects:*

Type of the object	Examples
Single topical object	

According to the function	
According to the level of preserving excursion objects	



*recommendations what to do and what not to do in selecting excursion objects:*

Recommended to do! \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Not recommended! \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



*where interesting information for the excursion can be found:*

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



*what the technological card of the excursion includes:*

	Назва пам'ятки (первинна і теперішня), а також популярна
Historic event and its date;	
	Місцезнаходження пам'ятки
Description of the attraction (drive-in, its author, the date of construction, material from which it is constructed, text on the memorial board)	
	Джерело отриманої інформації (літературні, архівні, усні перекази, опубліковані матеріали)
The level of attraction preservation (state and the territory of its location, the date of the last renovation)	
	Відповідальна особа за збереження пам'ятки
	В якій екскурсії використовується
The date of forming and the surname of the card creator	

**Additional recommendations** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

## 9.4. Excursion creation



*what itinerary is:*

Itinerary is the established in advance \_\_\_\_\_  
the typical feature of which is the use of some transportation of tourists along definite  
points.

In excursions the itinerary depends on \_\_\_\_\_ and  
\_\_\_\_\_.

There are 2 requirements to the excursion itinerary:

- \_\_\_\_\_;
- \_\_\_\_\_.

There are 3 ways of constructing the excursion itinerary:

- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_.

Excursion itinerary should be made very \_\_\_\_\_. The  
transportation from one attraction to another should not take more than  
\_\_\_\_\_ minutes, long distances should be replaced by \_\_\_\_\_  
ones, in turn. The movement along the same places near the same objects must be  
\_\_\_\_\_. In walking excursions, the distances should be \_\_\_\_\_,  
because \_\_\_\_\_  
\_\_\_\_\_.

When creating the itinerary, the guide should check the \_\_\_\_\_ and  
\_\_\_\_\_ of covering the distance. The results should be written and  
additional time (10-15 minutes) for the safe side.



## Lecture 10. THE MAIN STEPS IN CREATING AN EXCURSION PRODUCT

### Plan of the lecture

- 10.1. Individual (control) excursion text.
- 10.2. Technological card of the excursion.
- 10.3. Guide's portfolio.
- 10.4. Methods of presenting excursion material from guide's portfolio.
- 10.5. Final step in creating an excursion.



*Technological card of the excursion, introduction, main body, conclusion, guide's portfolio, content of the portfolio, methods of presenting the portfolio information, illustration, comments, contrast, calculation of expenses, advertisement.*



### **References:**

2, 3, 4, 6.

### 10.1. Individual (control) excursion text



*what is individual (control) excursion text:*

**Individual (control) excursion text is** \_\_\_\_\_

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The test variant contains only \_\_\_\_\_ from the scientific sources. Thus, the test variant serves \_\_\_\_\_

\_\_\_\_\_. It's the so-called "ideal variant" which must also include \_\_\_\_\_ and \_\_\_\_\_, as well as the \_\_\_\_\_ from one part of the excursion to another. If it is impossible to present the material in chronological order like in the countryside excursions or overview excursions, it should be given according to the \_\_\_\_\_.

## 10.2. Technological card of the excursion



*what the technological card of the excursion is:*

**Technological card of the excursion is** \_\_\_\_\_

It includes:

- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_.

If the excursion is held with different groups (schoolchildren, adults), it is desirable to \_\_\_\_\_.

Technological card as well as the test variant consists of the \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_. The aim of the excursion is formulated and placed \_\_\_\_\_ the introduction. The headings of the technological card must be precise as in the plan because the volume of the card mustn't exceed \_\_\_\_\_ pages of the printed version. There are the following headings:



- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;
- \_\_\_\_\_;

### 10.3. Guide's portfolio



*what guide's portfolio is:*

**The guide's portfolio is** \_\_\_\_\_

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It is a necessary element in the guide's job which makes it more \_\_\_\_\_ and \_\_\_\_\_. The guide must always take it with himself/herself. The \_\_\_\_\_ of the portfolio must be enumerated, placed in \_\_\_\_\_, easy to be taken out and

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The goals of the portfolio are:

- \_\_\_\_\_;

- \_\_\_\_\_;
- \_\_\_\_\_.

#### 10.4. Methods of presenting excursion material from guide's portfolio



*what method is;*

*what methods of presenting excursion material there are:*

Method is \_\_\_\_\_

Method of presenting excursion material is \_\_\_\_\_

There are some **methods** how to represent the materials from the guide's portfolio.

Name of the method	Short description
Illustration	
Comments	
Contrast	

#### 10.5. Final steps in creating an excursion



*final steps in creating an excursion:*

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***Conclusion***

Thus, the final stage of creating an excursion includes the preparation of \_\_\_\_\_

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The common methods of presenting information from the guide’s portfolio are:

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The work of creating a new excursion is considered to be finished when

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***Additional Notes:***

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### *Self-Study Questions*



1. What is individual (control) excursion text?
2. What are the components of technological card of the excursion?
3. What is a guide's portfolio?
4. What material should be included into the portfolio?
5. Characterize the methods of presenting excursion material from guide's portfolio.
6. Describe the final step in creating an excursion.

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