

# Дослідження молодих науковців

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## ETHNIC TOURISM: THE PROBLEM OF CONCEPTUAL TERMINOLOGY AND METHODOLOGICAL APPROACHES TO SOCIAL-GEOGRAPHIC STUDIES

The article deals with the analysis of foreign and national researchers' approaches to definition of the concept of ethnic tourism. The majority of existing studies devoted to ethnic tourism in America and Europe concentrate on describing it as trips to exotic and often isolated ethnic groups (Smith V., McIntosh R., Goeldner C., Van den Berghe P., Harron S., Weiler B.). Some scientists regard that ethnic tourism includes trips to forefathers' homelands with the purpose of learning the own ethnic belonging – nostalgic tourism (King B.). Along with the term of ethnic tourism, the concepts of aboriginal tourism (Getz D., Jamieson W.) and native tourism (Butler R., Hinch T.) are widely used, though the same phenomenon is meant. Russian researchers use the concepts of ethnic tourism, ethnographic tourism and nostalgic tourism.

No unanimous opinion as to definition of ethnic tourism is found with Ukrainian scientists (Kyryliuk L., Parkhomenko T., Kyfiak V., Kliap M., Bochan I., Kulakovska I., Orlova M., Chubrey O., etc). We understand the concept of ethnic tourism to be a type of tourist activity that satisfies the consumers' interests in cognition of material and spiritual culture of certain ethnos (ethnic group, ethnographic group) that inhabits (or previously inhabited) a certain territory. While on excursions, tourists get acquainted with architecture, clothes, folklore, rituals, folk traditions, handicrafts, everyday life, ethnic cuisine, historic events, known persons, and monuments of certain ethnos or its part (sub-ethnos or ethnic group).

The algorithm of socio-geographic study of ethnic tourism potential within a big poly-ethnic urban settlement contains five stages: 1) the study of historical and geographic specificities of formation of regional (settlement) population's ethnic structure on the whole, and specific ethnic group in particular; 2) establishment of the dynamics of the level of population's ethnic variety; 3) the study of the material and spiritual cultural heritage of ethnic communities; 4) point evaluation of ethnic tourism objects; 5) development of ethnic-oriented excursion routes.

**Key words:** ethnic tourism; nostalgic tourism; aboriginal tourism; ethnographic tourism; educational tourism; ethnic community; ethno-tourism potential; ethnic excursion routes.

### Ярослав Джаман. ЕТНІЧНИЙ ТУРИЗМ: ДО ПРОБЛЕМИ ПОНЯТТЄВОЇ ТЕРМІНОЛОГІЇ ТА МЕТОДИЧНИХ ПІДХОДІВ СУСПІЛЬНО-ГЕОГРАФІЧНОГО ДОСЛІДЖЕННЯ

У статті проаналізовані основні підходи зарубіжних та українських дослідників до визначення поняття "етнічний туризм", подано авторське визначення цього терміну. Розроблено алгоритм і запропоновано методіку суспільно-географічного дослідження етнічного туризму у великому поліетнічному місті, які включають п'ять етапів: вивчення етнічної структури населення і особливостей її формування, визначення рівня етнічної різноманітності населення, дослідження культурної спадщини етнічних громад, бальне оцінювання етно-туристичних об'єктів, розробка етнографічних екскурсійних маршрутів.

**Ключові слова:** етнічний туризм; ностальгічний туризм; аборигенний туризм; етнографічний туризм; пізнавальний туризм; етнічна громада; етно-туристичний потенціал; етнічні екскурсійні маршрути.

### Ярослав Джаман. ЭТНИЧЕСКИЙ ТУРИЗМ: К ПРОБЛЕМЕ ПОНЯТИЙНОЙ ТЕРМИНОЛОГИИ И МЕТОДИЧЕСКИХ ПОДХОДОВ ОБЩЕСТВЕННО-ГЕОГРАФИЧЕСКОГО ИССЛЕДОВАНИЯ

В статье проанализированы основные подходы зарубежных и украинских исследователей к определению понятия "этнический туризм", дано авторское определение данного термина. Разработан алгоритм и предложена методика общественно-географического исследования этнического туризма в большом полиэтничном городе, которые включают пять этапов: изучение этнической структуры населения и особенностей ее формирования, определение уровня этнического разнообразия населения, исследование культурного наследия этнических общин, бальное оценивание этно-туристических объектов, разработка этнографических экскурсионных маршрутов.

**Ключевые слова:** этнический туризм; ностальгический туризм; аборигенный туризм; этнографический туризм; познавательный туризм; этническая община; этно-туристический потенциал; этнические экскурсионные маршруты.

**Problem statement.** The study of recently born social phenomena is a logical stroke in present-day social geography, and scientific research of ethnic tourism is one of the aspects of socio-geographic cognition. Solution of terminological problems in the process of study of ethnic tourism – determination of its essential characteristics, adoption of maximally adequate definition, and development of algorithm and methodical approaches to its socio-geographic study – thus seems to be exclusively

important.

**Analysis of latest studies and publications.** The study of any process, phenomenon or object requires understanding of its essence. Each science possesses its conceptual-terminological apparatus and methods of research. Social geography has its own conceptual terminology, and it is clear that adequate vision of really existing phenomena fixed in terms and concepts is solely available when definitions are strictly interpreted.

The problems of terminology with ethnic tourism were disclosed in a number of scientific works by foreign [4, 9, 16 – 23, etc] and national [2, 3, 6 – 8, 10 – 15, etc] authors. However, there exist different approaches to definition of the concept of ethnic tourism, as well as methodical approaches to its study are still insufficiently developed.

**Aims and tasks.** The present study *aims at* the analysis of the problem of conceptual terminology of the phenomenon of *ethnic tourism*, and suggestion of the methods of its socio-geographic study. Disclosure of different essential characteristics of the social phenomenon of ethnic tourism available in scientific literature; presentation of author's vision and his own interpretation of the concept of ethnic tourism; development of the algorithm and the methods of socio-geographic research of ethnic tourism in a big poly-ethnic urban settlement represent the tasks of this study.

**Study results.** To begin with, it is necessary to collect the pilot studies of European and American scientists who as far back as 1970s had discussed the necessity of study of such new tourism phenomenon as ethnic tourism. Appearance and rise of ethnic tourism was conditioned by specificities of social development, urban processes with their positive and negative effects, and eagerness of some representatives of civilization to for at least a while get back to the environment of those communities whose activity was not yet distorted by the minuses of living in a metropolis [10, P. 70].

V. Smith was among the first to interpret the concept of ethnic tourism as the one that basically aims at cognition of fundamental traditions of exotic nationalities and includes visits to their homes and villages, observation of their dances and ceremonies, and primitive products' trade [21, P. 2].

Having considered V. Smith's definition, R. McIntosh and C. Goeldner have found ethnic tourism to be a trip aiming at observation of the culture and the mode of life of purely exotic nationalities with such typical tourists' activity as visiting the tribe homes, observation of tribal dances and ceremonies, and, probably, participation in some religious ceremonies [20, P. 139-140].

P. Van den Berghe have described ethnic tourism as a form of tourism where cultural exotics of the aboriginals serves to be the tourist trap [22].

S. Harron and B. Weiler regarded ethnic tourism to be a trip motivated by search for close contacts with people whose ethnic belonging and cultural specificities were different from those of tourists. Tourists in the first place seek to enter into the spirit of the primitive culture not deformed by influences of civilization, and that is why they choose such objects as rural communities living in remote places and behaving "exotically" [18, P. 84].

As was concluded by S. Muravska, the majority of available European and American studies into ethnic tourism concentrate on describing tourism as trips to visit exotic and often isolated ethnic groups [10, P. 71]. Some scientists regard that ethnic tourism should include the friends and natives' travels to their foregoers' motherland to know their own ethnic belonging (nostalgic

tourism) [3, P. 1]. B. King refers ethnic tourism to trips with basic motivation of "ethnic reunion", that is, the author regards them to be the visits of ethnically close people. The visits of the travelers from the New World (North America, as a rule) to the Old World to learn their own blood are the good example [19, P. 175].

Having generalized previous studies, Lee Yang has defined ethnic tourism as tourism basically aiming at search for exotic cultural experience through interaction with dissimilar ethnic groups. It would include tourist trips with observation of artifacts, rituals, etc, connected with specific ethnic group. The process of observation of said artifacts, rituals, etc, is an important portion of motivation for such trip [23, P. 3]. In this context, the ethnic group represents a socially/culturally separate group of people sharing common history, culture, language, religion and mode of life.

Along with *ethnic tourism*, the concept of *aboriginal* tourism suggested by D. Getz and W. Jamieson is widely used, as well as *native* tourism, though the same phenomenon is meant [17]. R. Butler and T. Hinch described the *native* tourism as tourist activity by directly native ethnic group aiming at study or observation of attractive attributes of their own culture which they grew away from for whatever reason [16, P. 9]. The scientists regarded that native tourism presupposed participation of native people, while it was not necessary that representatives of ethnic groups whose culture appeared to be attractive in specific case were the participants of tourist activity in ethnic tourism.

Russian researchers speak in terms of *ethnographic tourism* and *ethnic tourism*. Furthermore, they use the former in the widest sense understanding it as both *aboriginal* and *native* tourisms [4], while *ethnic* tourism is referred to as *nostalgic* tourism, that is, as "... visiting places of own historical origin" [4]. N.A. Malova maintains that "nostalgic or ethnic tourism is a leisure time activity when tourists get acquainted with specific ethnic group of population, its way of life, cultural and living patterns, etc" [9]. Trying to define ethnic tourism, the author interprets it as nostalgic tourism.

No unanimous opinion as to definition of *ethnic* tourism is found with Ukrainian scientists. It can be to a great extent explained by the fact that the Tourism Act, Ukraine, does not formalize ethnic tourism to a single type of tourist activity [5]. Among 17 types of activities referred to in the Act, the *cultural-cognitive* and *rural* tourism bear the closest relationship to ethnic tourism.

The majority of Ukrainian tourismologists suggest that these concepts be at least correlated as the entirety and particularity, if not equaled. Thus, pointing to quick growth of nostalgic tourism in Ukraine, L. Kyrlyuk specifies ethnic tourism as one of the types of nostalgic tourism and suggests delineation of borderlines of its mass development to follow the frontier Zakarpattia Oblast, the Lviv Oblast, and the Volyn Oblast. The scientist associates this type of tourism in the first place with visiting relatives who appeared to live on different sides of the state border [6]. His views are concordant with some other researchers' opinions [8] that have found their way in popular science publications [14].

T. Parkhomenko is of similar opinion. She regards

that "... the nostalgic tourism sometimes overlays the ethnic tourism when, for example, the emigrants visit their ethnic homeland". The ethnic tourism satisfies people's need in strengthening of their national identity, that is, in their inclusion into certain social community on the basis of common origin and culture. It is a kind of genetic call, or "the call of the wild", to one who visits his/her ethnic homeland but was born and brought up in different socio-cultural environment. In the meantime, the nostalgic tourism is exclusively individual; it is more intimate if compared to ethnic tourism. It is not a call of ethnic identity, but a retrospection of own life's journey, and an attempt to break the back of time irreversibility by way of spatial reappearance [12].

V. Kyfiak understands ethnic tourism as travels to see friends and family [7]. This statement of the essence of ethnic tourism is rather discussable since the author's interpretation can not but refer it to nostalgic tourism.

According to M. Kliap and F. Shandor, ethnic tourism (nostalgic, ethnographic) represents a sub-variety of tourism performed by tourists who visit places of their historical living. I. Bochan considers ethnic tourism to be an important component of human values; a specific type of human activity motivated by aspiration for cognition

of regional natural history and cross-cultural resources, insight into values of ethnographic groups in the areas of their compact settlement. I. Kulakovska specifies that ethnic tourism is a kind of trip whereby tourists get acquainted with certain ethnic group of population, their life, cultural make-up, household, etc [15, P. 36].

M. Orlova regards ethnic tourism to be a sub-type of cognitive tourism aiming at acquaintance with material and spiritual culture of certain ethnos living or having lived on a certain territory [11]. N. Petryk and O. Chubrey insist that it is tourist trip for the purpose of getting acquainted and cognition of certain ethno-cultural environment with its original particularities – traditions, handicraft, everyday life, and culture [13, P. 151]. To our opinion [2], it is this definition that the most adequately specifies *ethnic tourism* since it completely describes the Bukovynian inhabitant's tourist trip to the festival of Lemkos or Hutsuls; his visit to the Crimea to see the tartaric households or the Jewish cemetery in Chernivtsi, etc. The "ethnic tourist's" major impulse is his wish to experience the culture of certain ethnos irrespective of his genealogical links with that community.

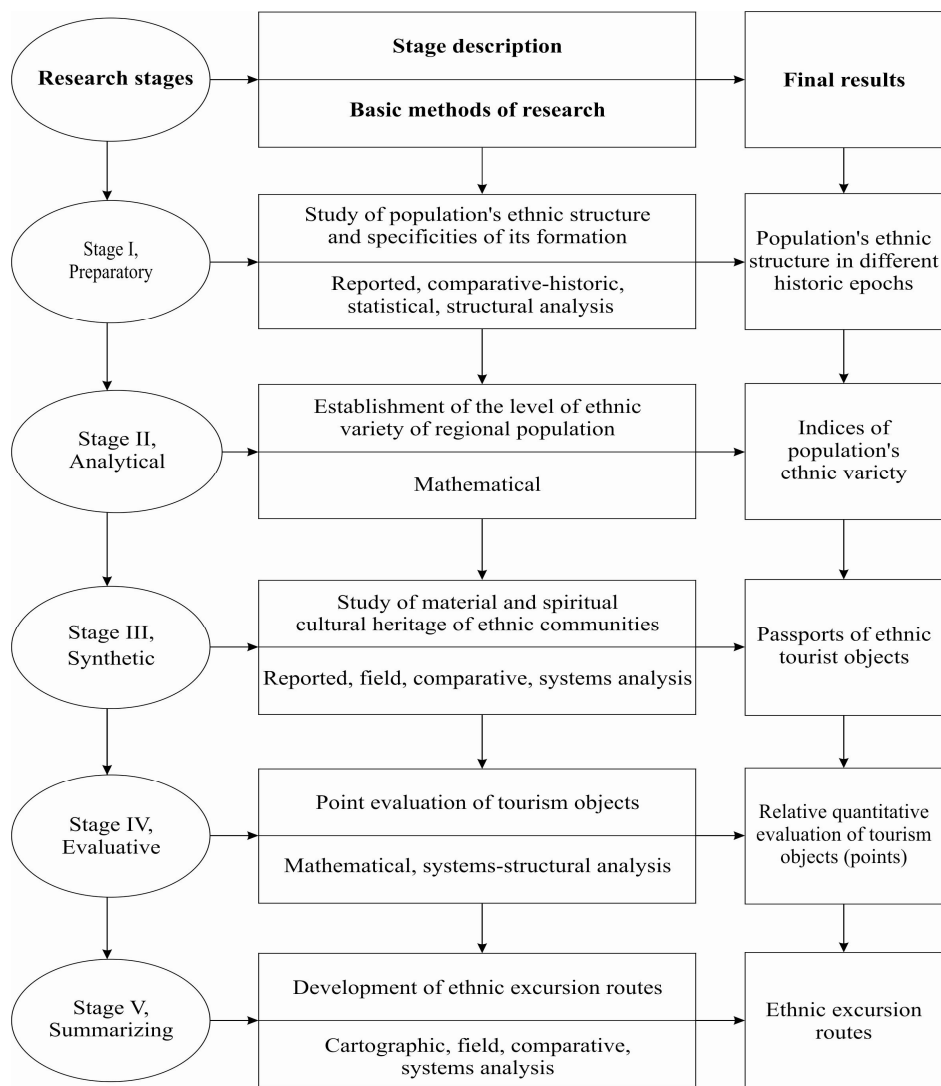


Fig. 1. Algorithm for the study of ethnic tourism potential and development of ethnic excursion routes

Following the aforesaid, we understand the concept of ethnic tourism to be a type of tourist activity that satisfies the consumers' interests in cognition of material and spiritual culture of certain ethnos (ethnic group, ethnographic group) that inhabits (or previously inhabited) a certain territory. While on such excursions, tourists get acquainted with architecture, clothes, folklore, rituals, folk traditions, handicrafts, everyday life, ethnic cuisine, historic events, known persons, and monuments of certain ethnos or its part (sub-ethnos or ethnic group).

Potentially, big poly-ethnic urban settlements are the most attractive centers for the development of ethnic tourism. The history of each national community is interesting and inimitable; each community leaves multi-layered and many-sided monuments of material and spiritual culture. Ethnic tourism in poly-ethnic space of the urban settlement presupposes acquaintance with places and objects, traditions and culture not only of original population, but also of ethnic groups that came to that place later.

Development of methods to help study ethno-tourism potential is a complex problem. Taking into account said potential's specificity, it seems appropriate that the potential was to its best explored within five stages as in Fig. 1.

The first stage would be devoted to the study of ethnic structure of population and historic-geographic specificities of its formation, that is, the ethno-geographic position; historic specificities of state formation, since each state significantly effects on changes in population's ethnic structure, makes its mark in town-planning and architectural environment of the urban settlement, its material and spiritual culture; population migration flows and the migrants' ethnic composition; ethnic differences in population movement; specificities of ethnic processes. This stage would avail of the reported, statistical, comparative, and structural analysis methods of research. Mathematical methods taken use of on the second stage would help establish the level of population's ethnic variety (diversity). There exist several quantitative parameters for the analysis of ethnic groups' allocation. The index of ethnic variety ( $P_j$ ) sug-

gested by B. Ekkel; E. Piassetky's index of ethnic diversification ( $S$ ), and V. Dzhaman's index of ethnic variety ( $E_v$ ) [1, P. 21-25] are the most widely used methods to help establish the level of regional ethnic variety. On the third stage of his research, the scientist would deal with the material and spiritual cultural heritage of ethnic communities that inhabit (or previously inhabited) the territory (urban settlement) under analysis. The reported, field, description, systems analysis would be the most appropriate methods on this stage. The point evaluation method would be used on the fourth stage of research when each tourism object will be given a certain number of points (relative quantitative index). The fifth stage would represent the mapping of the objects of material and spiritual heritage thus allowing to establish concentration and spatial allocation of the objects of corresponding ethnic culture and better develop excursion routes. Beside mapping, the summarizing stage makes wide use of the field, comparative and systems analysis methods of research.

**Conclusions.** 1. Scientific literature still shows no unanimous approach to definition of the concept of *ethnic tourism*. It is to a great extent conditioned by the fact that the *Tourism Act, Ukraine*, did not refer it to as a single type of tourism.

2. We understand the concept of *ethnic tourism* as a type of tourist activity that satisfies consumers' interests in cognition of material and spiritual culture of certain ethnos (ethnic group, ethnographic group) that inhabits (or previously inhabited) a certain territory.

3. It seems appropriate that socio-geographic study of ethnic tourism potential was conducted in five steps (stages): 1) the study of historical and geographic specificities of formation of regional (settlement) population's ethnic structure on the whole, and specific ethnic group in particular; 2) establishment of the level of population's ethnic variety within the territory under study; 3) the study of the material and spiritual cultural heritage of ethnic communities; 4) point evaluation of ethnic tourism objects; 5) development of ethnic-oriented excursion routes.

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