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Fragmenting tourism

Niche tourists

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Introduction

Tourism, a global socio–economic phenomenon, is freely used as a broad generic term that covers a broad continuum of tourism and other travel related mobilities, comprising tourist and visitor activities and experiences serviced by a travel and tourism industry as well as host destinations. While always acknowledged as a fragmented industry, increased global tourist arrivals and international tourism expenditure has seen many large commercial and public sector organizations address Western-centric societies through mass undifferentiated marketing; targeting entire marketplaces such as specific countries or regions with 'one size fits all' holidays. Broad-brush marketing often announced the existence of a destination or a packaged tourism product and how they are to be performed, often presenting potential tourists with certain kinds of limited knowledge about tourism spaces, peoples and pasts; a process that often did not distribute the benefits of tourism to a large cross section of those societies. Such marketing approaches can create a cluttered, untargeted environment in which tourists become part of indiscernible 'mass markets', which may overlook other 'niche markets' and ensure that many legitimate businesses fail to meet customer needs in the provision of tourist products and services. While other industries have seen a paradigm shift from 'mass markets' to 'mass niches', reflecting fragmenting industries and niche consumption, this chapter investigates if a paradigm shift or nudge has occurred within tourism. By focusing on changing supply and demand issues, this chapter asks whether tourism marketing has adapted to more demanding specific interests, when such interests coalesce into coherent niche tourism markets determined to be treated as 'special'.

Rigid forms of mass tourism development 'complemented' (Marson 2011) the rigid novelty and climatic motivational properties of the early 'old tourist' (Poon 1989), 'mass tourism' marketing primarily seeking to develop and cultivate high volume, low value and mass market consumptive opportunities. Often, such opportunities are still marketed as normal practice, a purchase signalling acceptance into membership of society, conformity to social convention and rising social mobility. The global tourism-industrial complex, made up of an alliance of large private–public businesses and institutions have, particularly in periods of economic growth, offered limited choices for means to achieve social, political and economic inclusion based

on norms, tradition, custom as well as promotional and regulatory discourses. Mass tourism is 'deeply embedded in the organization of life in the more developed world' (Shaw and Williams 1994: 175), hegemonic tourist discourses now firmly etched into many tourist movements and spaces, meaning habits are conditioned by institutionalized configurations that precede tourists and which continue to intensify and reproduce across generations. Pre-disposed to act in certain ways, tourists are often relieved of decision making, standardization meeting limited 'desire for performance' (Soguk 2003: 30) and expectations of participation (Marson 2011), tourism imagery often positioning tourists in distinct social spaces that orchestrated new forms of social life (Sheller and Urry 2006).

Often bereft of market research and customer intelligence, destination managers when facilitating tourists' experience of otherness have done so through a tried and tested network of shopping malls, museums, golf courses, and railway stations, hotels, resorts, airports, museums and beaches. This approach is often successful early in the destination lifecycle (Butler 1980) and emerging markets such as China, helping to manufacture relationships between elements that would otherwise have no connection, while facilitating individual independence from group interests, organic or territorially bounded social relations (Aradau *et al.* 2010). However, many have critiqued the 'mass markets' approach since it often facilitates the expulsion of alterity beyond 'the boundaries of some ethnically, culturally or civilizationally purified homogeneous enclave, at whatever level of social or geographical scale' (Morley 2004: 309). Whilst the positive and negative effects of mass tourism are well documented (Shaw and Williams 1994), the scope of economic power and the scale economics surrounding 'mass markets' may mean the tourism-industrial complex can assert a hegemonic right to regulate and exploit mass undifferentiated markets within homogenized templates, and circulate tourists according to its own desires for profit and capital accumulation. Because of the focus on volume, only limited and tried and tested choices may be available to consumers and while remaining popular for many, since it finds a way to meet the needs of 'old tourists', it can stifle diversity and give consumers the 'lowest common denominator' (Lew 2008: 411). It also ignores those willing and demanding to pay premium prices for more unique, individualized products, services and experiences. While the 'mass markets' approach is product driven**,** the post-modern and dynamic societies in which individuals now live means a shift in orientation across industries from a product-orientation to a consumer-orientation that customizes products and services for distinct 'niche markets', requiring flexible and responsive practices and a move from mass marketing to niche marketing. The refrain from many industries is that there are no more mass markets. From computing to retail, mass markets have splintered into a myriad of differentiated niche markets, where demanding consumers have pushed firms to offer a greater range of products customized to their needs. Therefore, the implication is that tourism, a complex phenomenon working more as a metaphor than a label in a world where everybody seems to have mobility related aspirations, plans or projects, has seen a similar shift, or at least a nudge.

Fragmenting tourism

Tourism, while complex, suggests and informs the imagination and novel forms of identity making. Bruner (1991) rejects any deterministic position that confines the tourist to a discourse constituted outside their own physicality, outside their own 'selves', as he states that 'of course tourists have agency. . . There are no persons without agency, without active selves' (Bruner 2005: 12). Tourism, then, can no longer be considered a single phenomenon where the tourist role is pre-arranged and produced by a dedicated tourism industry and consumed by an unreflexive, habitual population, since the most ordinary of people at the most ordinary of times

can now 'deploy their imaginations in the practice of their everyday lives' (Appadurai 1996: 5). It is this imagination which 'is now central to all forms of agency, is itself a social fact, and is the key component of the new global order' (Appadurai 1996: 31). In a world in motion, individuals are drawing upon their imagination and access to mobility to cross borders in ever-greater numbers inside and outside of quotidian realities, in pursuit of opportunities and possibilities, provoking 'new concepts, new ways of seeing and being' (Robertson 1994: 2). Connecting 'within and across different societies and regions, transport-systems, accommodation and facilities, resources, environments, technologies, and people and organizations' (Van der Duim 2007: 967–68) enables individuals to explore consumerist post-modern aesthetic and intensified forms of individualized identities (Savage *et al.* 2005) in far greater numbers than was ever before possible.

To suggest that the tourism industry is fragmented is not new with Poon (1989) noting the shift from 'old tourism' (e.g. the standardized holiday package) to 'new tourism' which is segmented, customized and flexible. However, individuals are now able to 'live "in" the world of modernity much more comprehensively than was ever possible before the advent of modern systems of representation, transportation and communication' (Giddens 1991: 211), Cresswell (2006: 45) noting that 'not only does the world appear to be more mobile, but our ways of knowing the world have also become more fluid', which possibility might not just change the world but ways of knowing it. This identity construction encompasses both people's 'sense of who they are (what might be termed personal identity) and their sense of who they are like, and who they are different from (what might be termed social location)' (Skinner and Rosen 2007: 83). This trend has been also been propelled by global competition; economic turbulence; over-familiarity (and defiance) with the concept of 'mass destination' (Holden 2008), uniqueness of new niche products, time squeeze, investment in tourism infrastructure, technology, space contraction, affluence, economics of scope, new marketing and branding strategies (Lew 2008; Marson 2011; Poon 1989).

A 'new age of mobility' (Ki-Moon 2009) and individualism has led to spatio-temporal orderings where 'transitional identities may be sought and performed' (Edensor 2000: 333) and from which narratives can be constructed and new perspectives communicated. It means individuals now seem to be more than ever prone to articulate complex affiliations, allegiances, belongings, attachments and occasioned, intermittent, sustained encounters to multiple issues, pasts, events, people, places, cultures and traditions, opening up the 'possibility of adjusting understandings, relationships and self-actualization' (Crouch 2006: 361). As individuals search for new belongings, changing the way that they conceive of themselves and their perspective on the world, it is often at the expense of older certainties, belongings, solidarities, loyalties and block identities. The acceptance of 'personal choice across a range of tourist activities' (Robinson, Heitmann and Dieke 2011: xii) does not mean the end of mass markets and the systems and structures that organized much of mainstream tourist life by choreographing mobility and social relations. While fragmenting, tourism has not dissipated into shapeless crowds. However, as people rearrange their social relations with regard to the constraints and opportunities that new and innovative tourist products can give when experiencing the world, the fragmentation of tourism products (Marson 2011) means the 'the old stories of group (Communal) belonging' (Bauman 2001: 98) are becoming replaced with 'identity stories' in which 'we tell ourselves about where we came from, what we are now and where we are going' (ibid. 99).

Policy-makers, planners and many in the tourism industry who largely failed to address more unique wants and needs now recognize the demand shift in the niche markets is significantly large, and often made up of consumers willing to pay for meaningful experiences. The late acceptance and identification of those unique wants and needs was often because they lacked

specific descriptors. For example, the needs of 'drifters' in the 1970s were not met, and it wasn't until youth independent travel remerged in the early 1990s that the label 'backpacker' came to be produced as a clearly defined discursive category. It was only then, governments and entrepreneurs began to have a practical sense of this world and its inhabitants' needs, their dispositions seen as durable through economic downturns and unforeseen events, making them an attractive long-term investment. Backpackers today are viewed as strategically important by an increasing number of businesses, regions, institutions and governments (O'Regan 2010), their mobility becoming central to many economics and livelihoods.

As it was with backpacking, the paradigm shift may be better described as a nudge with a snowball effect developing as more individuals seeking better control of their social and spatial positioning proved vocal, persistent and motivated in their preferences, undermining the central assumptions of the mass market approach and homogenized templates. The advent of technological forces and the Internet in particular has made many existing and emerging niches visible, encouraging new relationships between consumers, between consumers and small producers and amongst/between producers. Slowly, but with increasing momentum, those who sought to transform themselves into the kinds of people they're supposed and want to be, are influencing the direction of their own moves and experiences and standing out more because, for once, they were not being herded together with the masses or left in the margins. As people share similar habits, practical knowledge, assumptions and routines, and reflexively recognize a shared pattern that is inter-subjectively communicated, so a process is initiated, the 'beginning of institutionisation' (Jenkins 1996: 128). As new social labels emerged (i.e. wine tourist) or such labels become understood with reference to an internal–external dialectic of identification (Jenkins 1996) such as 'backpacker', where 'all identities – individual and collective – are constituted' (Jenkins 1996: 20). The specific nature of the skills, competencies, knowledge and interactions between those who react to such labels has become an interest for academic researchers who see tourism from an 'interior, subjective perspective as well as a positivistic, external objective position' (Novelli 2005: x). As researchers looked behind macro descriptions of tourism and the tourist (which are often value laden) to uncover 'other, socially differentiated realities' (Favell *et al.*, 2006: 2), they are finding individuals explicitly acting to fashion their identities by regulating their bodies, their thoughts and their conduct in new ways from within a fragmenting industry, along with diverse businesses developing and marketing diverse tourism products catering to diverse but specific needs and wants.

Niche tourism

The term 'niche' may be used where a particular social group might occupy a space (Chinatown) or even when a subculture (i.e. urban explorers, environmental activists, artists, free-runners) occupy a specific niche within a larger community by appropriating specific places or infrastructure. As an expression of identity and belonging, these 'niches' often encompass alternative spaces and sites of interaction that work outside mainstream societal codes, regulatory over sight, civic law or rules and may even challenge the habitual and the routine. Over time, a niche might become associated with the language of business and become a specialized market, since niches can be identified with distinct consumption patterns, and demand for specific tailor-made products and services. Such niches may even sustain their own economies that exist under the radar of large Fordist-style firms, since as limited markets, they may be attractive for entrepreneurs as well as smaller and flexibly organized businesses. Entrepreneurs may have been co-participants in a niche before getting involved in developing products and services for that niche; or niche businesses eager to escape competition enter a niche by exploiting some

specific and special competence such as firm specialization, product differentiation, customer focus and niche marketing (Dalgic 2006).

When used in the context of tourism, the terms of 'niche tourism' and 'niche tourist', whilst widely used and easily understood descriptors, are borrowed from the term 'niche marketing', which in turn appropriated the niche concept from language used in the discipline of ecology (Robinson and Novelli 2005). As a label or category, 'niche tourism' and 'niche tourist' can generate a surprising amount of debate. From the scholars who contest the conflicting claims to its origin, the entrepreneurs who seek to extend it as a label to the tourists who wish to distance themselves from it, there is little agreement as to the nature of 'niche tourism' or 'niche tourists'. From a demand viewpoint, niche tourists participate in special interest practices, experiences, products and services that distinguish and differentiate them, niche tourism reflecting 'the power, or at least the apparition of power, of the consumer' (Robinson and Novelli 2005: 1). From a supply perspective, specific interests can coalesce into coherent markets or segments within segments which a business can exploit by 'catering to the needs of specific markets by focusing on more diverse tourism products' (Marson 2011: 9). Such 'niches' may often generalize, homogenize and objectify those who participate in a particular practice or experience a similar product, with Robinson, Heitmann and Dieke (2011) noting the tourist product consumption is often misidentified as niche, when in fact, it may be more related to tourist motivation (e.g. wedding tourism, sex tourism). Robinson and Novelli (2005: 7) argue that the usage of the term 'niche' is not without its semantic problems but has 'taken on a common-sense meaning', favoured by policy makers, statisticians, academic researchers and marketing publications. Even if 'niche tourist' when extended to a particular product, experience or practice (i.e. religious tourist) has not become an internal identification for the individuals participating, it does, however, make them legible in a modern society.

Seeking to classify particular interests as a form of mass and/or niche tourism misses the point, since there is always a necessity to understand tourists' unifying constructs, behaviours and interests, and subsequently identify and develop products that suit those interests and motivate them to travel. Rather than opposite, counter-point or left over from 'mass' tourism, these small specialized sectors of tourism labelled 'niche tourism' indicate a quantitative difference in comparison to mass tourism, since niche products only appeal to select smaller groups that geographically span the globe. However, authors such as Novelli (2005) also suggest a qualitative difference, if niche tourists engage in socially responsible and sustainable behaviour.

Niche tourism supply

From a tourism supply perspective, 'differentiated upon patterns of perceived demand segments that in turn are located within social and environmental characteristics, both embracing and attracting the participant' (Trauer 2006: 185), the tourism product range expanded as 'special interests' emerged from personal choices in the early 1980s. While small practitioners have always adopted the notion of differentiation or specialization by catering to niche markets (Weber 2001), the unique needs and wants of many niches remained unseen to many large public and private institutions, their lack of foresight, customer intelligence, resources, capabilities or credibility preventing them from identifying and developing products to meet the needs of smaller groups with similar interests. Coming out of a global recession in the late 1980s and early 1990s, businesses became more responsive to the forces and energy of those with special interests, the fragmentation of tourism products developing into specific niche markets.

Niche tourism creates openings for tourism to be negotiated differently by consumers in the marketplace but also creates openings for flexibility for small- and medium-scale entrepreneurial

enterprises and grass roots organizations which, if in physical closeness to niche products, may be in the best position to extend tailored offerings within existing niches. In contrast to mass tourism, businesses need to be flexible and nimble as they develop new products, a bottom–up approach driven by knowledge of the niche's aggregate individual needs (Shani and Chalasani 1992). While not all common 'special interests' groups will become niche markets that can be selected and grouped and made profitable, regulated or managed, specific, innovative and even radical tourism products may be profitably developed for many. While many of these so-called consumers would fail to recognize themselves as niche tourists or as 'belonging' to markets, smaller firms, rather than being driven to control all aspects of a tourist experience can forge customer-centric relationships that fulfill the needs of small groups of customers by innovating to their niche demands and interests.

Given the increased recognition, many trans-border special interest groups, subcultures, and others with similar affiliations, ideas, taste and lifestyle, businesses and destinations may develop products for emerging niches that have yet to take hold. They may initiate and provide new tourist products and customized experiences before a market exists for them so as to promote belief in a niche before it materializes for participants who have money to spend. Businesses that identify a niche before others and develop it by concentrated marketing can create a base of 'early majority' customers, and may hope to build authority and dominance over a niche market. Such an approach, however specialized, supports and grows diversity of choice, since each innovation is according to a diverse idea, taste, lifestyle, preferences and niche interest, with many willing to pay premium prices to have their demands, needs and interests met. This has led to niche tourists being characterized as wealthier, better-educated and more desirable consumers (Robinson and Novelli 2005) because rather than consume a narrow range of high volume, low value, largely standardized products, niche tourist consumption is primarily motivated by very specific activities, peoples, places, events or pasts. However, such conclusions can only be drawn from particular demand segments and the particularities of a supply system in particular locations and times (Trauer 2006).

Classifying niche tourists and tourism

While Robinson and Novelli (2005: 5) argue that there are 'no formal rules for what can, or what cannot, be referred to as niche tourism and there exists considerable variation under this broad term', they do make a division between niche tourism and mass tourism activities, a split, that may be seen as arbitrary, since many of the niches mentioned by the authors may have already gone on to become mass markets. They do make a division between macro-niches and micro-niches, and thereby create sub-divisions. A macro-niche is characterized as a relatively large market sector (i.e. cultural tourism, sport tourism, etc.), with each capable of been broken down as micro-niche activities and practices of a particular parent group (i.e. cultural tourism may include genealogical tourism and faith tourism as micro-niches). Marson (2011) goes on to argue that as this micro-niche tourism grows, it begins to fragment into smaller products and markets (i.e. faith tourism fragments into pilgrimage). Micro-niches are often in danger of being objectified, reduced to economic value; Robinson's and Novelli's (2005) model categorization of niche tourism forming a common-sense meaning spectrum does allow for continued innovation, diversity and research. The authors also argue that niche tourism can be related to one of three approaches. They are a 'geographical or demographic approach' wherein 'place' plays a key role in tourism consumption (i.e. wine growing areas and their related activities in wine tourism), a 'product related approach' when the presence of activities, attractions, settlements, food and other amenities is emphasized, and a 'customer related

approach' when tourist requirements and expectations are the focus of the niche tourism marketing approach.

Micro niche tourism markets mentioned in research have included photographic tourism, geotourism, youth tourism, faith tourism, gay tourism, dark tourism, genealogy tourism, gastronomic tourism, wellness tourism, whisky tourism, bicycle tourism, slum tourism, educational tourism, volunteer tourism, battlefield tourism, adventure tourism, gaming tourism, wildlife/safari tourism, agritourism, culinary tourism, diaspora tourism, drug tourism, ecotourism, geotourism, health tourism, literary tourism, pro–poor tourism, rural tourism, social tourism and much more (Novelli 2005; Papathanassis 2011; Robinson *et al.* 2011). Such broad clustering is helpful but often deceiving. It helps with facilitating promotional plans, targeted marketing, estimating numbers and creating appropriate price points. However, many micro-niches remain largely underexplored (usually those that don't promise profitability), while other 'written about' niches go unchallenged, with little in the way of a balanced corpus of research and literature surrounding many, except by those eager to structure them as growth markets, even if such analysis leading to that conclusion is based on derived or short–term demand. Employed labels and typologies that suggest market niche participants share similar different traits can be deceiving, given it is inadequate to label anyone an 'ecotourist' just because they visit a protected area or label anyone who stays in a backpacker hostel a 'backpacker', niches and their participants often engaging in very different practices for very different reasons. A label such as 'adventure tourism' may encompass hundreds of activities, whilst other labels simply overlap so much as to make any understanding of the participants' needs difficult (i.e. war tourism, battlefield tourism, military tourism, disaster tourism). Such labels also do not address whether various 'soft' or more 'serious' participants exist within any given niche, with labels often little more than 'adjectival tourism' (all forms of tourism that have an adjective in front of them). Such labels may also be driven by conceptual research (i.e. existential tourism, experiential tourism). That said, a growing academic corpus investigating niche tourism from demand and supply-side perspectives, and incorporating other variables such as the media, has established niche tourism beyond a list of 'instances, case studies and variations' (Franklin and Crang 2001: 5). Research on demand systems (i.e. level of involvement, interest and financial situation) and the supply system (i.e. tourism places/destinations, tourist products) suggests that when you combine all these different niches, it rivals the mass market in size and span.

Marketing

The persuasive discursive context generated by a tourism-industrial complex is primarily based on scale economies, low prices, branding and saturation mass marketing in traditional tourism markets. It is a top-down approach that may be applied to a society at large or through (large) market segmentation. The more specialized, flexible and customer tailored offerings inherent to niche tourism, however, are dependent on understanding motivations, demographics, buying behaviour, lifestyle characteristics and the psychographics of a particular tightly defined market niche. Niche marketing is 'a method to meet customer needs through tailoring goods and services for small markets' (Stanton *et al.*, 1991). In niche marketing, 'the focus is on the customer and on profit; niche marketers specialize in serving marketing niches. Instead of pursuing the whole market (mass marketing), or large segments of the market, these firms target segments within segments or, for the sake of simplicity, niche' (Dalgic and Leeuw 1994: 44).

Businesses that identify different market niches and meet their needs need a well–developed understanding of its participants, before any decision on promotional planning, marketing

messages, communication tools and distribution channels is made. As businesses develop a customer-centric approach so as to assist niche tourists (or those with a more critical form of subjectivity that refuse any label) in becoming self-transformed, they are looking to penetrate niches by understanding motivations and meeting customer needs so as to generate enough profit to make the effort worthwhile. A lack of detailed research or information reduces the effectiveness of marketing campaigns, whilst better intelligence and an understanding of how niche tourists are involved in the 'co-creation' of experience (Binkhorst *et al.* 2009) would allow businesses to develop niche markets and engage in more efficient marketing, contributing to more rapid and evenly based growth.

Since niches are often discovered and cultivated as a market by small businesses owners, often fronted by enthusiastic entrepreneurs, they may be able to identify underserved niches, emerging niches and changing values without the benefit of extensive market research. They are often 'closer' to their product consumers and they may also feel they 'know' their customers better, and therefore they are better placed to gather the 'customer intelligence' needed to create emotional relationships while innovating differentiated products and services. Lifestyle entrepreneurs (run by specialists, hobbyists and enthusiasts) can use reputational or relational capital in their networks and their own experiences to start up a business in a particular niche (Peters *et al.* 2009), but increasingly use online-offline market surveys and data mining to identify potential niche market segments and develop smarter niche-marketing campaigns to explore those niches which are growing. A host of new and often free online tools have emerged to help businesses identify and develop a niche business. Tools such as the Ice Rocket Trend tool (http://trend.icerocket.com/) may, for example, indicate how popular a certain topic or niche is, while other tools may help to investigate the online popularity of a given niche, subculture or interest group. Businesses are also looking to destination marketing organizations (DMOs) and Central Statistics Offices to conduct frequent and more detailed surveys of visitors and their requirements, as well as utilizing national census data and ideas from customers themselves. Such tools, techniques and sources can quickly identify niches driven to the surface because of environmental, political, social, technological and economic changes (i.e. increased urbanization leading to a growth in niche active tourism in the countryside). Large and established tourism institutions in contrast, while armed with market research data, a better understanding of modern technology (i.e. communications, analytical tools) and an inventory of exploitable natural, cultural and historical resources at destinations, will need to tailor individual niche marketing plans to suit particular markets and break with transactional relationships using disruptive marketing. A top-down marketing and segmentation approach will lack the nuance and credibility of a customer-centric, bottom-up approach.

Niche marketing campaigns

As a fragmented industry is recognized, businesses are moving away from mass marketing to niche marketing or even micro marketing (tailoring products and marketing to suit the tastes of specific individuals and geographic locations). A niche's establishment is often linked to a business's, a 'niche marketing' philosophy. Techniques are required to communicate business depth, values, and competencies to niche consumers, through credible claims, testimonials, accreditation, motivational messages and consistent images, so as to cultivate respect and trust while forging closer long term customer relationships. Rather than pursue the whole market (or segments), businesses target niches using bottom-up 'down to earth', 'below the line', 'relationship', Dalgic (2006: 10) noting how 'niche marketers specialise in serving marketing niches' through a bottom-up approach where the marketer starts from the needs of a few

customers and gradually builds up a larger customer base (Shani and Chalasani 1992). However, the complexities of developing niche tourism markets and communicating with a possibly widely scattered niche population means niche marketing interactions must be thoughtfully designed. Whilst a niche should promise potential profits and growth, niche marketing is about developing a strong foothold by branding, building awareness and driving long-term demand so as to serve a niche viably and profitably. However, it is a challenge since businesses have to make a profit from relatively low sales. This means marketing costs and other overheads must be kept low, since they can be spread over a high output. As fixed costs per unit are relatively large, high prices have to be charged to be successful in a niche market.

To be sufficiently recognizable or differentiated, communication through websites, engaging niche users through blogs, niche market trade shows, business networking, brochures and personal communications, may require partnering with established retailers, specialized tour operators, niche publications and tourism boards for cutting through a marketplace saturated with competing messages. Due to the high level of sophistication and individualism of many niches, the development of relationships through computer technologies, mobile devices, mobile apps and social media, while fraught with complexity, has both marketing opportunities and challenges. Business owners must also seek out and link the right cluster of activities, peoples, events, partners and cross-sector information that gives enough pull and credibility for target niches in a way in which they can create meaningful tourist experiences. This approach has the benefit of increasing the visibility of niche products as well as creating added value to the overall tourist experience by giving tourists greater variety and diversity. These networks also allow tourists more freedom and independence to pursue their own interests within a niche, resulting in more individualized and customized tourist experiences. Such 'place' networks may also create the impetus for joined up destination marketing. However, such a move depends on creating internal place identification amongst the network participants and a general integration of products into the fabric of a place and destination.

Niche marketing at a destination level

So successfully has niche tourism competed in an increasingly competitive and cluttered tourism environment, that localities, regions and nations have after assessment of their inventory of resources (products, businesses, events, subcultures) used joined up niche marketing campaigns to focus on (economically) prioritized and tightly defined niche markets, making those events, businesses etc. 'market fit' for specific niches. It is an approach that could be aimed at diversifying, differentiating and rejuvenating tourism products, acquiring a competitive edge, maximizing the tourism potential of a destination or using niche tourism to kickstart a tourism industry. By designing a destination to meet the needs of a certain niche, destinations at a national level have successfully diversified their tourism industry, but any city (i.e. Bangkok – medical tourism) or locality may also be marketed where products are identified as 'fitting' within a niche. While Mongolia has sought to promote horse riding, fly-fishing, cultural expeditions and visits to nomad based communities to mid- to upscale niche markets (Gantemur 2012), Newquay in the United Kingdom has promoted itself as a surfing destination, creating a network of specialist shops, training schools and accommodation establishments for surfers (Meethan 2002). Other examples may include archaeological tourism in Sudan and Ethiopia, fishing in The Gambia, trophy-hunting in South Africa, surfing in Côte D'Ivoire and diving tourism in Eritrea (World Bank 2009).

However, some destinations have drawn accusations that they market fictional niche products or market niche environments as 'themes' to facilitate place marketing. These fictional

competencies are often unrealistically produced for political and economic reasons. Destinations, for example, may market their distinction and differentiation through their subcultural life (i.e. gay districts in Manchester – Hughes 2003) to tourists as a signal of its uniqueness. Grazian (2003) argues that Chicago, for example, invented and marketed its status as the blues capital of the world by creating commercialized niche tourist attractions for those seeking authentic black blues culture.

Challenges

Certain late twentieth-century niche practices have expanded to impact society at large, having becoming embedded in new processes, spaces and places of regeneration and even post-conflict resolution (i.e. Cambodia), its practitioners often using innovative customer-centric niche marketing strategies to attract tourists, creating both opportunities and challenges. Mass niches remain burdened with the cultural, political, social, economic and environmental baggage of 'tourism' since niche tourism remains linked to a spatial logic and tourist consumption. While smaller businesses, volunteer groups and local communities may offer disassociation from a tourist industrial complex and grant more agency, choice and inventiveness, they too manufacture and trade in experiences and exploit the demand for emotional involvement and authenticity. While often innovative, flexible and responsive to emerging niche market needs, niche businesses are subject to the 'coercive laws of competition' that may eventually force such independent efforts to behave like capitalist enterprises, even when their product is politically, socially, environmentally or culturally sensitive (safari tourism, pro-poor tourism, slum tourism, gay tourism, dark tourism). As niches impact on the centre, they are often subject to the attention of larger firms looking to grow or change and driven by competitive reasons to pursue leadership positions by expanding each niche to its full potential by whatever (exploitative) means. Since small businesses are often under-capitalized and business fragile, when combined with weak regulatory checks, low barriers to entry, competitive intensity and difficulty of supervision, a short-term profit focus may emerge.

New challenges emerge when niche practices and the infrastructure that surrounds them become popular and fundamental to the mainstream tourism industry. They may create their own issues, controversies and challenges, with tourism marketers often struggling to manage the messages around changing processes, spaces and places of transition when 'success' strikes the spaces, systems, processes, communities that originally made development appropriate for a destination. There is also the risk that niche tourism makes fragile communities and destinations visible in a global context, reducing people and places into something only important as marketing attributes appealing to a mid- to upscale niche market interest and taste. The activities and practices that attract tourists may also become magnified, distorted, lost, or refuted in the process of growth and transition. Gallipoli, often associated with battlefield tourism through its Anzac day commemorations, has become associated with backpacker tourism and educational tourism after niche growth and commercial cross sell.

Marketers have also struggled to deal with the fall-out-of niche tourism practices which are found to under-deliver in terms of expected economic benefits (i.e. job creation), sustainability and when niche development and management have adverse impacts on the sustainable development of destinations (e.g. small cruises to Antarctica). While many niches, when developed appropriately, can enhance the local economy, preserve a destination for future generations and cultivate ethnical tourists, certain niche activities may not be suitable for some destinations and their communities. The development of niche tourism in communities is also challenging, since those involved in tourism, while enthusiastic, often lack the professional skills and

experience required to successfully attract and satisfy niche tourists. This is especially true if a community seeks familiarity with particular subcultures for marketing and promotion purposes. This may be exacerbated in relation to tourism products and services built around specialist knowledge and training (adventure tourism, safari tourism, photographic tourism). Niche tourism may also not offer a solution to those destinations seeking a form or type that is more sustainable or integrated to the real economy than mass tourism.

Further research

Niche tourism has become a focus for conferences, modules in formal academia and institutions and investigations by academics, practitioners, policy makers, consultants and researchers. However, the focus is usually on a small number of established niches, rather than those in decline, while many others remain unexplored. There is a need to expand beyond the focus of niches as a 'consumption process' (Novelli 2005) with more research required on why certain niches emerge and the specific needs, interests and motivations that sustain them, as well as the different motivations and practices of those within a niche. Such research may create a greater understanding of niche tourist behaviour so as to better aid small businesses to identify a profitable niche and position/target their products. There is also a lack of understanding as to the challenges and complexities businesses face if seeking to attract specific niche tourism markets to specific areas, and whether success can lead to neighbourhood, community, regional and national development. There is also a gap in knowledge as to how supportive linked networks may be developed between niche businesses and the role of regional and national governments in developing, promoting and facilitating niche tourism. Further research is also required in understanding the complexities of the relationships niche tourists form with people, places and pasts as they come to consume and experience them, the impact niche tourism development may have on future destination development and whether forms of niche tourism could be more sustainably developed and managed by businesses and communities.

Conclusions

The stark dichotomy between mass and niche is too simple to capture the development of niche tourism and tourists. Social, economic, political and cultural factors combined with innovations in information, communications and transport technologies, have given impetus to individuals seeking new bonds, social differentiation, distinction and status. These are deep forces, and for many, the economic crises (2007–current) will hasten individuals to rethink aspects of their lives – from where they live, how they work, to how they invest their lives. Rather than consume discourses provided by a tourist-industrial complex, the fullest stretches of the imagination are now sought (and increasingly catered for and met) in the margins. Individuals can now imagine themselves in a countless variety of settings and practices no matter how remote or inaccessible, the imagination envisaging global possibilities often far from their immediate environments. This chapter, in seeking to make sense of this reflexive identity search and longing for unscripted spaces, peoples and cultures, argues that profound societal changes have enabled the development of what is commonly labelled niche tourism. A constant mutual exchange between suppliers and markets has enabled thousands of small to medium enterprises, and, more recently, large firms and destination marketing organizations to serve, co-produce and collaborate so as to develop niche products. These diverse consumption related activities have become woven into the social, political and economic lives of communities, villages, towns and cities across the globe. The development and access to new tourism experiences has helped integrate localities and consumers

into the wider tourism economy and helped extend consumer choice, and thereby create a global consumer marketplace that is a major driver in tourism growth.

Business success depends on gathering and analyzing information so as to sense and respond to rapidly changing customer interests and deliver the right niche product, at the right time, at the right price, for the right customer; customer intelligence is required to identify, evaluate and meet the needs of 'niche' markets whose similarity of ideas, taste, lifestyle have led to similar consumption patterns. Products, services, events and destinations offered to niches through niche marketing must offer differentiation and specialization, and the means to support the staging and transformation of the self. Where individuals mobilize themselves to reflexively align with the value or fundamental truths associated with a niche product, an immersive performance can potentially provide power, taste, uniqueness and feelings of 'being someone'. The chapter sought to look at some of the complexities when seeking to identify and meet niche market needs as well as pursue a niche marketing strategy. While as a term, 'niche tourism' remains contestable (vis-à-vis other terms such as special interest tourism), market fragmentation, differentiation and specialization will continue to remain important features of tourism.

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