# LONG TAIL TOURISM: NEW GEOGRAPHIES FOR MARKETING NICHE TOURISM PRODUCTS

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**ABSTRACT**. The Long Tail concept refers to the Internet-based economy that has enabled company success through a focus on highly specialized services and products that are not in high volume demand, but maybe in high-value demand. The concept of the post-tourist, for example, is a Long Tail phenomenon. Long Tail marketing approaches are proving success due to advances in communication technology and social networking that have given more people access to a broader range of goods and services and information. The Long Tail is not without its challenges, including increased global competition, and it has not abandoned geographic considerations. Geography, in fact, can help to differentiate niche products and must still be overcome to consummate the tourist experience.

**KEYWORDS.** The Long Tail, social software, marketing, geography, the Internet

The *Long Tail* theory refers to the behavior of economic sectors that provide products in relatively low volume, but are able to make a profit by providing a greater variety of products in aggregate. This is in contrast to the *short head* sectors where profit is based on a more narrow range of products selling in much higher volume. The tendency for natural patterns and social behavior to congregate on a short head, and "tail off" into a long tail is well known in statistics, where the long tail refers to the far ends of a normal statistical distribution. In a normal bell curve, the highest frequency occurrences appear at the center of the distribution and then gradually taper off at the high and low extremes. Those tapered extremes are the Long Tail. Long Tail events occur in a relatively rare frequency, including items that are low in individual popularity or in sales. However, in many instances, the total aggregate number of occurrences that are found in the Long Tail can be greater than the total aggregate number of occurrences in the short head.

The Long Tail part of the statistical distribution has also been by referred to as *heavy tales*, *power law tales*, and *Pareto tails*, among other terms (Adamic & Huberman, 2002; Brynjolfsson, Hu, & Simester, 2003). The power law suggests that small occurrences are extremely common, while large occurances are extremely rare (Adamic, 2005). The Pareto tails rule is also known as the *80–20 rule*, and suggests that 80% of effects come from 20% of instances (Reed,

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2001). For many economic activities, 20% of products (the short head) generates 80% of sales, while the remaining 80% of products (the Long Tail) provides 20% of sales. This is often cited with reference to Long Tail economics. Markets that lower the short head below 80% and increase the long tail to over 20% are often cited as representing a move toward a Long Tail economy (cf. Anderson, 2008a).

In spatial geographic terms, the Long Tail concept is related to Central Place Theory, the Gravity Model, and Distance Decay (McKercher & Lew, 2004). Patterns that reflect this distribution include the geographic frequency of most plants and animals, the income distribution within a corporation, the geographic distribution of newspaper sales, and political power within a society. From a tourism perspective, the short head is the *honeypot* destination that is widely known and attracts large numbers of visitors, while the long head is the specialty niche destination. In each case, the dominance of the short head and the length of the tail will vary considerably from one sector to the next.

The Long Tail idea has recently gained general popularity as a way of explaining the structure and success of Internet-based activities and, in particular, as representing a new approach to the marketing and selling of products that did not exist prior to the advent of the Internet (Anderson, 2004; Brynjolfsson, Smith, & Hu, 2003). The Internet provides an inexpensive medium for individuals and businesses to reach audiences and potential customers that are not bound by traditional geographic time and space limitations. The Internet frees many businesses from traditional location factors (such as the relative distance to raw material and customer locations). This is especially true for specialized services and small, niche market products that comprise the Long Tail economy. The assumption of the Long Tail approach is that "opening up those previously uneconomic niche markets should increase overall demand: as people are better able to explore niches, they are more likely to find things they like, and may well consume more of them" ("Profiting from Obscurity," 2005).

Some of the most successful Internet-based companies in the world today rely on the Long Tail for a large proportion of their profits. Two companies that are often cited as prime examples of this are Amazon.com and eBay.com (Anderson, 2004). Amazon.com, the world's largest Internet retailer, started out as a book seller, and books still make up a large part of this now highly diversified company's sales. The books section of Amazon.com rates each book based on how many copies have been sold. More than 30% of Amazon book sales are for those that are below its 130,000 top sellers (Anderson, 2004; "Profiting from Obscurity," 2005). Amazon leverages the Long Tail by providing access to warehouses that contain a much larger selection of books that are not available at any single brick and mortar bookstore.

In 2004, eBay.com had close to 105 million registered users worldwide who posted almost one billion items for sale, resulting in over US$32 billion in total sales ("EBay Profit," 2004). They accomplished this by enabling its users, including both individuals and small companies, to sell a myriad of products within the infrastructure provided by the eBay website. Many of the items posted for sale on eBay are not immediately sold and are not even bid upon because their demand is so low. However, there is a demand. These low amplitude products comprise the Long Tail, and eBay may be the most successful Long Tail aggregator yet. At the same time, however, the near monopoly position of eBay.com itself, among online auction websites, points to some of the challenges of marketing in the Long Tail.

## THE LONG TAIL MARKET APPROACH

The Long Tail market has huge potential. However, it is highly distributed and highly individualized. The lesson of the Long Tail is that low demand or low sales volume products can collectively exceed the value of the few best sellers. To do this requires (a) aggregating a sufficient number of products, (b) minimizing storage and distribution costs by strategic warehousing, and (c) developing broad and deep market and distribution channels. If the product mix is insufficient, then the aggregate turnover may be too low and prices may need to be too high to be profitable. If storage and distribution costs are high, only the most profitable products can be sold at a competitive price. Broad marketing and distribution channels are required to get your message (marketing) and products (distribution) to customers who are widely dispersed, possibly over the entire planet. Deep marketing and distribution channels are also required to provide the highly specialized products and individualized services that are demanded by the postmodern niche consumer. The Internet is probably the only affordable approach to economic success in this Long Tail marketplace. Geographic factors are still important, but their considerations are much different from traditional business location models.

Focusing on a Long Tail market requires a new way of thinking, and possibly a redefinition of success. A focus on the highest volume, such as the most tourists, is the more traditional, short head way of thinking. It assumes that volume is equivalent to value. Value, however, is a matter of perception. Large volumes can result in lower values for the consumer, the destination, and possibly even the service provider or entrepreneur. A Long Tail approach, by contrast, emphasis creating value for individual consumers and niche markets. The total potential volume for a business may be low if the market is small. However, if those customers place high value on the product, then the business may be able to capture a larger proportion of the market, as well as charging premium prices. Thus, success in these niche markets is measured by the value that their potential volume of customers places on the product or service offered.

Traditional short head marketing, and this applies to most of tourism as well, is focused on providing for the large, mass market majority. Because of their focus on volume, they only give consumers the most popular choices, which tend to emphasize the lowest common denominator among the largest population of consumers. In the short head business model, product change is incremental to avoid impairing those products with proven success. As such, they stifle diversity and provide only a very conservative approach to innovation.

Consumer do not always want the lowest common denominator, and increasing numbers of people are willing to pay premium prices for special, individualized products, services, and experiences. Long Tail marketing and product development focuses more on these small, minority niche market segments. They increase consumer choice by innovating to meet niche and individual demands and interests. Long Tail activities, therefore, support and grow diversity, both in terms of new innovations and in conserving traditions that might otherwise be lost (Anderson, 2004).

The short head is the stability seeking center, where security and safety are valued and maintained. The Long Tail is the experimental edge, where new communities, risk, and early adopters are more the norm. Consumers have benefited from the Long Tail because it provides a greater diversity choice, and in some industries much lower prices, as well. However, uncertainty, competition, and failure are also much greater in the Long Tail than in the stable and more dependable short head.

## *NICHE TOURISM AND THE LONG TAIL PHENOMENA*

For over two decades now, tourism researchers have been discussing tourism in the context of globalization and technological change. This has often been referred to as the *new tourism*, though it primarily has been about the emergence of niche market tourism. Auliana Poon succinctly summarized this trend in 1989:

> The economics of the new tourism is very different from the old—profitability no longer rests solely on economies of scale and the exploitation of mass undifferentiated markets. Economies of scope, systems gains, segmented markets, designed and customized holidays are becoming more and more important for profitability and competitiveness in tourism. (Poon, 1989)

In more recent years, several authors have expanded upon these ideas to suggest that the old forms of tourism were part of the era of modernity (16th–20th centuries), and that the new tourism was an aspect of postmodern society (late 20th century to present; Harvey, 1990 places it at 1972; see also Rojek, 1995). Furthermore, postmodern society has spawned the postmodern tourist, who has also been called the post-tourist (Feifer, 1985).

The post-tourist lives in a world of hyperconsumerism. Never before in the history of humankind have more consumers had more choices and more opportunities than today. Because of the many businesses that are vying for consumer attention in a crowded global marketplace, market differentiation and specialization are increasing. There are more market segments today than there were yesterday, and there will be more tomorrow than there are today. At the same time, style, branding, image, and prestige remain important to the posttourist. Popular styles vary with different market segments, however, and because they have more choices, consumers are also more aware of prices and perceived values. They are willing to spend money, but they want quality service, efficiency, and predictability.

The results of these trends in the tourist market has been an increase in FIT (fully independent travelers), Free and Easy (air and hotel only), and other forms of self-directed travel. It has lead to a rapid growth is special interest travel destinations and experiences, as well as travel to ever more remote corners of the globe. Culturally and environmentally sensitive travel has increased, though it remains a niche market. Short trips have become much more common, as people vacation as frequently as they can find the time. The Internet has vastly expanded the variety of market channels for travel products.

While large travel and tour companies continue to grow their online presence, the expanding number of smaller recreational and leisure travel providers look to the Long Tail as a model for business success. In the accommodations sector, Thevenot (2007) has suggested that the short head consists of the large hotel aggregator websites, such as Expedia.com and Hotels.com, as well as large hotel chains. This is followed by larger niche market sites, such as those for last minute travel and corporate travel. Farther into the Long Tail are hotel auction sites, specialty accommodations (such as youth hostels, luxury, and B&Bs), and single destination accommodation specialists. Although not included in Thevenot's list, more obscure accommodation options, such as "couch surfing" (staying at a stranger's house for free) and other forms of home stays lie still further down the tail, with accommodations that have no online presence, and rely solely on word of mouth marketing, being at the far tip.

## *LEVERAGING THE LONG TAIL WITH SOCIAL MEDIA*

The supply side of the Long Tail consists of the specialized niche products that a business provides, which can be marketed and sold through online websites. In Chris Anderson's (2004) original conceptualization of the Long Tail marketing model, he suggested three rules for developing the supply side. First is to *Make Everything Available*. For tourism businesses this means expanding the diversity of offerings, including peripheral attractions and services, and developing alternative ways of experiencing existing attractions and services. Older products should still be offered, if economically feasible, as they may have their niche markets. Second is to *Cut the Price, then Lower it*. What this means is to offer the product at a price based on the actual cost with an appropriate profit. Directly marketing to consumers, without a middleperson, should help to reduce costs, and this should be honestly reflected in what is charged. And third is *Help Me Find It*. This refers to the usability of the company's website and its broader web presence. It also includes search engine optimization (SEO) to make a website and products appear closer to the top of online searches. Fortunately, the more focused the search query is, the easier it is for a niche product to appear for the consumer. For example, a search for "Caribbean scuba" will result in more short head returns than a search for "Grand Bahamas dolphin scuba dive."

The demand side of the Long Tail is the growing wealth of online information that is available to consumers (Brynjolfsson, Hu, & Smith, 2006). Success in the Long Tail requires leveraging the social media tools that have contributed to recent information explosion.

In Long Tail terms, the growth in specialty travel products is an example of the fattening and lengthening of the tourism Long Tail. However, this has not necessarily come at the expense of the mass tourism head. Although package tours sales have been declining for some time, theme parks, cruise ships, and the most popular destinations are as full of tourists as ever. This is a reflection of the popularity of tourism worldwide, growing 6% in 2007 to 898 million international arrivals (United Nations World Tourism Organization, 2008). It is also related to the elasticity of the tourist role, because any one tourist can be a niche specialty traveler one day and a mass tourist the next. Many may even relish in such a diversity of experiences in their travels.

To differentiate themselves from mass tourism, Long Tail niche businesses, as well as destination marketing organizations (DMOs), need to leverage *social media tools* to build a sense of trust and a sense and a strong identity (Fukuyama, 1995; Goodman, 2005). Social media tools include blogs (or weblogs), discussion forums and user rating and review sites, podcasts (audio and video), and collaborative websites (such as wikis) (Gillin, 2007; Lew, 2006). All of these provide information on products by users of those products. Consumers trust the opinions of family and friends above all others, and are increasingly more wary of traditional mass market advertising approaches (Constantinides & Fountain, 2008). Social media tools provide consumers with alternatives to mass marketing for searching for, and believing in, the products they purchase. While not necessarily friends and relatives, the user generated content on social media websites are mostly posted by nonprofessional consumer peers (by other tourists, for example), and are more trustworthy as a result.

Specialist tourism businesses can also participate in online social media communities, and can even try to create their own social forums. They need to be able to converse and interact with their clients and potential clients, and they need to have an identity that all stakeholders can clearly define and are comfortable with, including the consumer, employees, and business owners. This requires a high degree of transparency and honesty. Transparency is necessary because consumers do not want to feel that that the business they are dealing with has something illegitimate to hide or is otherwise being deceptive. They want to know as much information as possible to make an informed purchasing decision. As the consulting company, PhoCusWright put it, "The size of your reputation matters more than the size of your marketing budget" (Offutt, 2007).

Some areas in which social software may be used to leverage Long Tail markets for business purposes include (Constantinides & Fountain, 2008):

- *Listening to markets and consumers and join social networks*. Many companies monitor what is being said about them in user communities and on blogs well beyond the boundaries of their marketing departments. It can be valuable to honestly address criticisms (both legitimate and not) in the forums where these arise, and as soon as possible when they arise. Companies can also have a more active presence in existing online social networks, not to sell their products, but to contribute to the community that has an interest in that product. This demonstrates a company's concern for the well-being of their customers. Joining established social networks is a way to build a web presence and reputation for niche businesses that may be too small or have insufficient resources to support an active social network on their own website. It also does not require the building of any special forums or other web-based tools on the company's website—though all messages from the company should clearly reflect its values.

- *Creating user communities*. Social networks can be created at relatively low cost through open source web site tools to supplement existing, static websites. At a minimum it could be a simple company blog that readers, including clients, can comment on. A social network, hosted by the business, should include reasons for people to want to feel as though they are part of the community of other users. The site could, for example, include both company and client blogs, question and answer forums, and possibly audio and video podcasts. By providing a public sounding board or forum for consumers of a company's products, a company can demonstrate its transparency and trustworthiness. Businesses need to be open to being criticized by consumers, in order to both learn from them and to build their trust.
- *Creating business alliances and using Long Tail facilitators*. This is similar to creating a user community, but involves a community of businesses who are working together either formally or informally. It would probably be a closed social network that is not open to the public. Long Tail facilitators include software providers who help with online bookings and website aggregators and travel agencies who market for a group of providers (Offutt, 2007). Aggregators groups are both large and small and for the Long Tail should represent some shared theme (geographic or activity-based) and philosophy (such as community-based tourism).

## *LONG TAIL CHALLENGES FOR TOURISM*

Major criticisms of the Long Tail concept and the user generated social media phenomenon include:

1. The farther reaches of the Long Tail—those sites and attractions that are most different from mass tourism destinations—have less information available and are treated with greater caution by consumers. Navigating in the Long Tail can be confusing and intimidating for many consumers. Long Tail businesses need to build the confidence of the new consumer through transparency, as discussed above, as well as by making their web sites clear and easy to navigate.
2. User generated content is debasing established culture and expert knowledge, threatening established institutions and brands, contributing to public confusion and frustration over truth and fiction, abusing intellectual copyrights, and bringing the demise of professionalism (cf. Keen, 2007, Gillin, 2007). These criticisms argue that the multitude of options and the confusion over legitimate and authoritative viewpoints leads consumers open to deception, theft, and personal endangerment.
3. The time and money costs of establishing and maintaining an effective social

media presence can be too demanding for small enterprises that have little financial overhead and may lack the necessary technological skills required. An ineffective web presence will provide minimal benefit, as consumer have limited patience when searching through a multiplicity of small websites. At the same time, however, there is evidence that smaller commercial websites are financially more successful than larger sites (Anderson, 2008b).

4. The Internet is not suited to searching for Long Tail niche products. The increased number of options that the Internet offers can be overwhelming to the consumer, which might lead confusion and a decision not to purchase (Iyengar & Lepper, 2000). Schwartz (2005) has called this the "paradox of choice" and one way that this can be overcome is through personalized and intelligent recommendation systems. The semantic web, which uses meta-information embedded in web pages to intelligently associate them, has some promise for this, though its implementation is still some years away.
5. There is considerable confusion over the type of data that is assigned to the Long Tail model. Three very distinct ways that the Long Tail can be applied to tourism companies include the size, reputation, and affiliations of a company.

   - *Company Size*. Size may be the measured by the number of employees, the number of clients served, or the revenues generated by a company. Smaller numbers in any one of these areas will indicate a Long Tail company.
   - *Company Reputation*. The less known a company is, either by the general public or within the tourism industry, the more likely it will be a Long Tail company.
   - *Company Marketing Affiliations and Aggregators*. Affiliations are groupings of related companies who promote one another by, for example, cross linking to each other's websites or jointly developing and marketing packaged products. Chambers of Commerce often facilitate these types of arrangements. Aggregators serve as web portals for similar companies. Sometimes they actually purchase products from many different companies for resale. Examples include online hotel booking companies and travel agencies. Collaborative business efforts, such as these, are mostly beneficial and are an important way of working in the Long Tail. However, they also blur the corporate lines between one business and the next and can raise questions of relative ownership, benefit, reputation, and responsibility. The smaller the number and extent of a company's marketing affiliations and aggregators, the more likely it is in the Long Tail of the industry.

6. Numeric size and reputation are also important considerations for the public sector, including destinations overall. Marketing affiliations and aggregators play some role for the public sector, but less so than for private companies because of the larger public and cooperative interests in the marketing of nonprivate destination. Geographic accessibility, however, is a more significant concern for the public sector.

   - *Destination Size*. Like a private company, the numeric size of a destination may be measured in the number of visitors to it, the number of tourism industry employees, and tourist revenues gained from spending in the destination. The number of tourists may be measured by the total to the destination, or to its attractions, or accommodations, or restaurants, or who use its transportation and other tourism infrastructure and services. It could also be based on the total number of attractions that are open for mass tourists, or on the total number of niche attractions for special interest tourists (such as museums, heritage sites, or sports facilities). In all of these instances, the smaller the number of visitors, facilities, revenues or attractions, the more the destination is in the tourism Long Tail.

- *Destination Reputation*. The reputation of a destination may be better considered in terms of the renown of the destination or of one or more of its attractions. Smaller destinations can benefit from the fame of the larger regions they are located within, while larger destinations and regions can build upon the fame of single attractions. A combination of well known attractions can be quite powerful for a destination place or region, and can move it out of the tourism Long Tail and into its short head. On the other hand, a negative reputation can have the opposite impact—reducing tourist interest and driving a destination further down the Long Tail.
- *Geographic Accessibility*. The more geographically isolated a destination place is, the more it is part of the Long Tail of tourism. Tahiti, for example, is well known and has some major international resorts. But it is geographically far from the world's major tourists sources and transportation to these South Pacific islands is very expensive. For these reasons, it is arguably a Long Tail destination, only for those who are willing to spend the extra costs and make the extra physical effort to get there. Accessibility can be addressed through government efforts to develop roads, airports, and other forms of transportation infrastructure. Political policies can also hinder visitor accessibility by causing infrastructure to deteriorate or making borders harder to cross.

The Long Tail concept can be applied to most products and most sectors of the travel industry, though perhaps not all. At a minimum, each sector is likely to have a different balance between the short head and Long Tail, and this relationship will probably change over time (Davis & May, 2007). A longer tail and shorter head reflects a more specialty-oriented economic sector. Consolidation through company mergers or closures would affect the curve, as would changes in consumer behavior. For example, the rise in fuel prices in 2008 has reduced the number of destinations and attractions that are financially accessible to most travelers, thereby thinning both the short head and the long tail of destinations. Some destinations that were closer to the short head are pushed into the long tail where they need to reorient their marketing efforts, while more distant long tail destinations may be almost pushed off the tail altogether.

## GEOGRAPHIC IMPLICATIONS OF THE LONG TAIL MARKET

In addition to the geographic accessibility issue, discussed above, geographic implication of the Long Tail include the growth of location-based services, the geographic variation in Internet access, the continuing need to transport tourists from their origin to the destination, and the role of the geographic concept of place in differentiating places that must now compete globally.

Location-based searching and services are an emerging segment of the Internet. These include mapping websites that provide trip planning information for travelers, as well as cell-phone and global positioning systems (GPS) technologies that provide real time information for consumers while they are traveling. These technologies and the services have improved tremendously in recent years, but still focus on mass tourism sites. They have a ways to go to reach the depths of the Long Tail to provide travelers with the special interests and experiences that many of them seek.

Internet adoption and access varies considerably across the globe. Internet penetration worldwide was estimated to be 21.1% as of March 2008 (Miniwatts Marketing Group, 2008). However, this varies from 73.1% in North America to 5.3% in Africa. Even if they have some Internet access, it can be poor and intermittent in many remote destinations. Access to that part of the Long Tail that can be leveraged by the Internet effectively excludes many developing countries, and small and niche businesses that rely primarily on the Internet are mostly marketing to North America, Europe, and the more developed parts of Asia. However, as the Internet expands into new regions and improves in peripheral territories, Long Tail accessibility will follow (Offutt, 2007). Over time, Long Tail companies in remote destinations will increasingly adopt a more sophisticated online presence, and thereby thicken the tail. For the more adventurous consumer, it is this fringe of the Long Tail that may hold the most promise for the special experiences they seek.

For the tourism economy, *geographic space* remains a constant, though it is modified by fuel prices and transportation access, as discussed above. Although virtual experiences hold some promise for the future, at the present time the only way that a tourist product can be consumed is by transporting the tourist to the destination. This could be considered the consummation of the online relationship developed through Internet-based Long Tail relationships. In addition to location-based technologies, the future holds considerable promise for virtual experiences of real places, which may alleviate the need for everyone to physically travel to every corner of the globe. Such experiences are likely to be very social, as most virtual worlds are today, and provide realistic (and possibly real) out of body and in place experiences.

For tourism, *geographic place* still matters in the Long Tail of the Internet. The Internet has removed many of the communication barriers between geographically distant locations. However, it has also meant that competition is now global. Tropical islands in the Pacific are now competing directly with tropical islands in the Caribbean and Southeast Asia. Because of this, competition among many small niche specialty companies can be as intense as it is among short head multinational corporations. Kelly (2008) argues that for the fine arts community, a minimum of 1,000 truly avid fans is necessary to provide an artist with a living wage. Anything below that, and further down the Long Tail, is a part-time work situation. Business skills and planning are still required in the Long Tail market. For destinations, geographic place-making is essential in differentiating one place from another. This requires defining a finer sense of place to distinguish one destination from another, so as to build place identity and place branding to attract a more specific niche market.

## CONCLUSIONS

Specialty and individualized travel experiences have always been part of the travel and tourism phenomenon. It is human nature to congregate and be social with other mass tourists, at some times, and to seek personal and individual paths at other times. The rise of mass tourism in the 1950s and 1960s also gave rise to youth backpacker travelers, who later became the growing middle class travelers of the developed world. Recognizing the interests of this growing market segment, the niche tourism industry became the "new tourism" in the 1980s and 1990s. Combined with the second boom in Internet growth, the new tourism economy has become the Long Tail tourism economy in the first decade of the 2000s.

The Long Tail concept essentially defines an Internet-based marketing approach for small- and medium-sized niche companies to enable them to compete in a global marketplace. It has been widely acclaimed by tourism bloggers and consultants as the best model for the expanding specialty tourism economy. It does not, however, guarantee success in the Long Tail. Traditional business considerations and values such as hard work and devotion to one's business are still essential requirements. The Long Tail does, however, provide new tools for communicating and building communities around shared interests between business entrepreneurs and consumers. This may have existed before the Internet, but it is much more open, transparent, and global today.

In *The Invisible Continent* (2001), Kenichi Ohmae described a new continent that was cyber-based and borderless. It was an easy continent to enter, open to all who were willing to give up their old ways of thinking. It was an easy continent to move around in, as it transcended national and corporate borders and barriers. Because it was so new, one could easily carve their own territory. It was a continent that was not dominated by social groups or elites, but was instead highly individualistic. And it was a continent in which the traditional profit models no longer applied. Kenichi Ohmae was describing the promise of Internet, which crashed with the Internet bust that occurred about the same time as *The Invisible Continent* was published. Many believe that with the new Internet, often referred to as Web 2.0 (cf. O'Reilly, 2005; Shuen, 2008), this new continent is not only emerging, but is here.

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