Development of international tourism to Cambodia: the role of benefit segmentation

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ABSTRACT

This paper reports empirical research carried out in Cambodia during 2003 on international tourism to that country. Over two hundred tourists responded to a lengthy questionnaire that established the benefits they sought from tourism, the activities in which they indulged whilst on vacation and their philosophies of travel. From their replies, it was possible to categorise tourists to Cambodia using cluster analysis and benefit segmentation techniques into two distinct clusters – essentially consisting of those travelling on a package holiday and those travelling independently. Though the two groups had fairly similar demographics, they were quite distinct in terms of their attitudes to travel style, their needs for food, drink, entertainment, and accommodation, the entertainments and diversions sought, and their means of relaxing. However, they had similar needs to interact with the Cambodian people, and experience the culture and history of Cambodia. This finding is useful in product development and promotion for the Cambodian tourism industry.

INTRODUCTION

This paper reports research carried out on international tourist visitation in the Kingdom of Cambodia during 2003. The research used benefit segmentation techniques to establish a snapshot of international tourism to Cambodia with the objective of providing effective marketing tools to national and regional tourism offices in Cambodia, and its tourism industry.

The Kingdom of Cambodia, like many countries in SE Asia, has had rather a turbulent time in the latter half of the 20th century but now is peaceful and set to take its place as a fascinating and rewarding Southeast Asian destination. The major draw for visitors to Cambodia is Ang-

kor, the ancient capital of the Khmer Empire, considered to be one of the ancient wonders of the world. The town of Siem Riep at the northern edge of the great Tonle Sap Lake is the gateway to Angkor and a base for visiting the temple sites.

Though tourism to Cambodia is increasing (to over two million in 2007, according to the MOT, 2008) these figures mean very little to tourism marketers and are not useful in constructing marketing strategies, unless the visitors are segmented in some way. Many approaches exist for segmenting a market. The marketing literature is replete with examples of methods of grouping consumers according to demographics, geography, purchase behaviour, market "position," and various cognitive measures. However, a very useful method for tourism marketers is "benefit segmentation" (Haley, 1985), in which consumers are grouped according to the benefit desired from a particular product category. Based primarily on cluster analysis methods, this approach has enjoyed widespread application, and it is especially useful in marketing strategy formulation, e.g. for a general understanding of market, for positioning strategy, for new product concepts and new product introductions, and for advertising copy decisions (Haley, 1971, quoted in Frochot and Morrison, 2000). It can be summarised thus:

Benefit segmentation (Haley, 1971: 3-4) is a tool for improving communications with the group or groups of consumers selected as the market target by selecting themes that improve the chance of capturing the attention of prospects and of involving them in the advertising and other forms of marketing communication (quoted in Frochot and Morrison, 2000, p.22)

Cluster analysis is a technique for grouping individuals or objects into groups. If differs from discriminant analysis in that the number and characteristics of the groups derived from the data in cluster analysis usually are not known prior to the analysis (Aaker, Kumar and Day, 2001).

LITERATURE REVIEW

Understanding destination characteristics is central to their marketing. Each destination can only match certain types of demand and hence tourism marketers need to appreciate travel motivations in order to develop appropriate offerings and brand destinations for the right target markets. In addition, destinations should be aware not only of the needs and wants of the active demand but also of the potential markets they can attract. It can then develop a product portfolio, which enables the optimization of benefits and their marketing mix can be adapted to their target markets. Consumer behaviour studies by Buhalis (1999) indicate that a wide range of criteria is used to select tourism products. These criteria change according to the purpose and features of the trip, elements of the external environment, the characteristics of the traveller and the particularities and attributes of destinations.

Understanding these behaviour patterns and influences helps in segmentation by dividing the overall markets into groups that have similar needs or interests, and then selecting target segments for marketing attention. A number of demographic factors such as age, family life

cycle stage, gender, education and social factors, and lifestyle can then be used to construct market segment profiles.

Positioning is a form of market communication that plays a vital role in enhancing the attractiveness of a tourism destination (Middleton, 2000). According to Kotler et al. (1999), one of the most effective tools in tourism marketing is positioning. The objective of positioning is to create a distinctive place (or position) in the minds of potential customers; one that evokes images of a destination in the customer's mind, images that differentiate the destination from the competition and as a place that can satisfy their needs and wants. Positioning is a communications strategy that is a consequence of market segmentation and target marketing.

Since market segmentation is based on the notion that different tourism destinations appeal to different types of tourists, target market segments must be selected before tourism marketers can begin to entice these potential customers by inducing appropriate images. An effective positioning strategy provides a competitive edge to a destination that is trying to convey its attractiveness to the target market (Chacko, 1997). Therefore, a task for an emerging tourism destination such as Cambodia is to establish viable market segments that can be operationalised by the country's tourism industry.

Little has been written on market segmentation of tourists to Cambodia. An extensive literature review only turned up a discussion on sex tourism to Thailand by Prideaux, Agrusa, Donlon, and Curran, (2004) that claimed that Cambodia was making extensive efforts to discourage this market segment, but were somewhat thwarted by the endemic corruption. Richter's (1999) paper on tourism to countries that had suffered political unrest made the unremarkable observation that any marketing of a destination is useless until the political situation is calm. Therefore, it would seem that this paper is of value to both practitioners and researchers in the field of tourism marketing. As tourism to Cambodia has doubled between 2004 and 2007 it is likely that these two market segments' needs and benefits sought have indeed been satisfied as a perusal of tour operators such as Asia web direct (http://www.visit-mekong.com/cambodia/tours) shows.

CURRENT DEMAND

Since peace has come to Cambodia the number of international arrivals has increased each year, except for a small drop from 2002 to 2003, and exceeded one million for the first time in 2004, and quickly doubled again by 2007. Figure1, gives details. It is obvious from this that tourism to Cambodia is in an emergent state, but is growing quite rapidly, from a very small base. However, these figures mean very little to tourism marketers and are not useful in constructing marketing strategies unless the visitors are segmented in some way.

Figure 1

Visitor Arrivals, Average Length of Stay, Hotels Occupancy and Tourism Receipts 1993 - 2007

Years	Visitor Arrivals		Average Length of Stay (days)	Hotels Occupancy (%)	Tourism Receipts (million US$)
	number	change (%)			
1993	118,183	0.00	N/A	N/A	N/A
1994	176,617	49.44%	N/A	N/A	N/A
1995	219,680	24.38%	8.00	37.00	100
1996	260,489	18.58%	7.50	40.00	118
1997	218,843	-15.99%	6.40	30.00	103
1998	289,524	32.30%	5.20	40.00	166
1999	367,743	27.02%	5.50	44.00	190
2000	466,365	26.82%	5.50	45.00	228
2001	604,919	29.71%	5.50	48.00	304
2002	786,524	30.02%	5.80	50.00	379
2003	701,014	-10.87%	5.50	50.00	347
2004	1,055,202	50.53%	6.30	52.00	578
2005	1,421,615	34.72%	6.30	52.00	832
2006	1,700,041	19.59%	6.50	54.79	1,049
2007	2,015,128	18.53%	6.50	54.79	1,400

Source: Kingdom of Cambodia Tourism Statistical report, November 2008

BENEFIT SEGMENTATION

Market segmentation is a process used in marketing to divide people into groups that share common characteristics (Morrison, 1989). The resulting 'segments' are expected to have similar purchasing and travel behaviour. Marketing decision-makers must then decide which segments of the market they will pursue; their 'target markets'. Thus, marketing segmentation is a two-step process involving (1) dividing the market into segments and (2) selecting the target markets. Developing appropriate marketing strategies follows, involve matching products, services, prices, promotions and distribution methods with the motivations, needs and expectations of the selected target markets. The process of market segmentation is an essential step in marketing planning as it leads to the most effective allocation of marketing resources and to greater precision in setting marketing objectives (Morrison *et al*., 1999). This process can certainly help the nascent Cambodian travel and tourism industry.

A number of methods exist to segment markets, based on social-demographic characteristics (age, gender, income, etc.), geography, behaviour, and psychographics or motivations. Benefit-based segmentation, where market researchers examine the benefits of a product perceived by potential purchasers, has become a powerful tool in determining what it is about a product that makes it attractive, useful and worth the price to consumers (Palaclo & McCool, 1997). Haley (1968) was the first to indicate that the basic rationale for benefit segmentation is that the benefits that people are seeking in consuming a given product are the basic reasons for the existence of true market segments. In addition, this information helps product developers enhance product strengths and overcome weaknesses. Protecting or enhancing the product may be a pivotal tourism development strategy (Heath and Wall, 1991).

In the travel and tourism industry, the diversity of products and customers has justified the intensive use of segmentation strategies as strategic weapons in an increasingly competitive environment. Among these techniques, benefit segmentation has received wide approval by academics and practitioners alike (Frochot and Morrison, 2000), and has been used for over 20 years in travel research. This method involves the segmentation of a market based on the benefits sought in a product rather than by simply grouping consumers on traditional factors such as demographic, socioeconomic, or geographic characteristics. It enables marketers to identify the type of benefits favoured by each segment, and hence effectively design the content of promotional and product strategies to different benefit segments.

Haley introduced the concept of benefit segmentation in 1968 to provide a better understanding and prediction of future buying behaviour than traditional market segmentation techniques. He reasoned that marketers should concentrate on the benefits sought by consumers, as these were the primary source of purchasing behaviour and warranted being the principal segmentation variable (cited in Frochot and Morrison, 2000). More specifically, the advantages of benefit segmentation are its capacity not just to classify customers by benefits sought, but also to profile each segment by using descriptive variables such as geographical, demographic, or other factors. Moreover, Woodside and Jacobs (1985) suggest that beyond orienting promotional messages and strategies, benefit segmentation could be used effectively for product design.

Moreover, segmentation based on benefits sought is generally able to predict behaviour better than the other more descriptive variables such as demographics and geographics (Kastenholz *et al.*, 1999).

METHODOLOGY

The study focused on international tourists in Siem Riep and Phnom Penh only, as they are the most popular places for international tourist visitation to Cambodia. A respondent-completed questionnaire was used to gather the primary data. Most of the items were selected from a previous benefit study by Morrison, Frochot and O'Leary (1999).

The questionnaire consisted of 106 items in four sections. The items focused on general benefit statements, vacation activities, demographic characteristics and travel philosophies. The tourist-respondent was asked to indicate his or her attitude to each statement on a five-point scale raging from 'not at all important' to 'very important' in the question of benefit statements, vacation activities and travel philosophies. In addition, respondents were asked the purpose of their visit, age, sex, travel type, length of stay, household income, education, country of origin and main destination in Indo-China.

Benefits already experienced and realized by visitors are better predictors of visitor behaviour than the responses from potential future visitors, selected from the target market area (Pearce and Caltabiano, 1983; Woodside and Jacobs, 1985). Based on this the respondents completed the survey just prior to departure from Cambodia.

The questionnaire used closed items as they are easier and quicker to answer, and also to analyse, than open-ended items. Closed items are useful in testing specific hypotheses and make it easy to make group or cluster comparisons. Twenty respondents pre-tested the survey, and it went through three iterations before implementation. The sample of 201 respondents came from a population of international tourists visiting Siem Riep and Phnom Penh. After the pilot study, respondents were randomly approached in the two destinations. Those who agreed to participate in this survey were informed of its purpose, assured of the confidentially of the information they provided, and told that it would be used predominantly for academic purposes.

As English is now the language understood by most international visitors to Cambodia, the questionnaire was given only to tourists who understood English – the great majority. However, this did, in the main, exclude tourists from China and Japan, two countries with much potential for tourism to Cambodia.

Most destination benefit segmentation assessment studies use questionnaires comprised of Semantic Differential scales and ranking scales. As this research is concerned with the similar issue of destination benefits, these same techniques in a similar questionnaire format were used in the data collection process, as shown in Table 1. These were used because these scales make comparison simple and are appropriate for clustering in benefit segmentation research.

Table 1: Example of an Item

Benefit Statements	Not at all important (1)	Not very important (2)	"OK" somewhat important (3)	Important (4)	Very important (5)
Visiting a place I can talk about when I get home.				X	

The questionnaire began with a screening question to ensure that the potential participant was, in fact, a tourist: if s/he did not fall into the required group, the researcher moved on to the next person. Westerners formed a large part of the sample because the questionnaire was conducted in English.
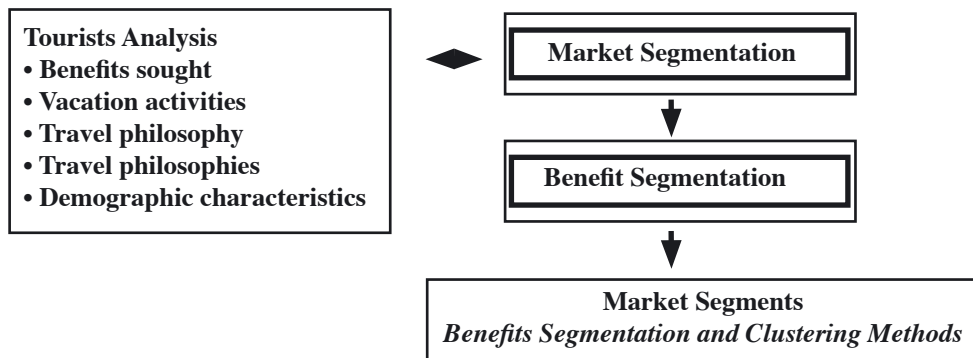
The first part of the questionnaire was about the importance rating of various Benefit statements. Based on a cluster analysis, groups can be identified that attach to a benefit statement. Having identified and tentatively labelled each of the benefit segments, further analysis can determine the salient differences in activity participation among the benefit clusters. Moreover, differences for selected groups of independent variables such as demographic and travel trip characteristics can be identified. Further sections of the questionnaire focused on Vacation Activities and Travel Philosophies, and these were analysed in a similar fashion.

To ensure adequate distribution of the survey instrument, several methods of distribution were used. First, the owners/managers and employees of the lodging establishments in the study areas—Phnom Penh and Siem Riep—asked their guests to complete and return the questionnaires. In addition, cooperative tour guides of various tour operators helped distribute the questionnaires to international tourists on their tours as well.

The inclusion of different accommodation types, geographical areas (Phnom Penh and Siem Riep) and the administration of the questionnaire were designed to ensure a varied and relatively representative sample. Overall, 500 questionnaires were distributed, with 300 in Siem Riep and 200 in Phnom Penh. Of these, 201 useful responses were collected, with 60% from Siem Riep and 40% in Phnom Penh.

The study profiled the diversity of international tourists in Cambodia, with their distinctive needs, benefits sought, and motivations, and was unique in number of ways. First, it focused on international tourists in Cambodia where little empirical research has been done. Second, the study examined the usefulness of benefit segmentation on international tourists for the tourism authorities and industry in Cambodia, rather than the impact of tourism on local residents, which has been the focus of most of the tourism research in Cambodia. Next, this study added to the understanding of international tourists to Cambodia in general. And finally, this research may act as a stepping-stone for further research on benefit segmentation in Cambodia. Figure 2 shows a summary of the research process and its outcomes.

Figure 2: Research Framework

RESULTS

In this section, the results of data collection are described and the statistical summaries and findings are presented. First, the demographic characteristics of the respondents are described. Next, the results of factor analyses and cluster analyses are described and illustrated. Finally, the reliability and validity of the measurement scales are examined and interpreted. Statistical analysis was carried out using the Statistical Package for Social Science (SPSS 11.5 and 12.0). Significance tests were conducted using t-tests and chi-square analysis, where appropriate. The significance level for all tests was set at the 0.05 level.

A total of 218 surveys was returned, but after eliminating the unusable responses, 201 responses were coded and used for the data analysis. As a result, a 40.33% response rate was obtained for the 500 surveys distributed.

The demographic details of the respondents can be summarised thus: the sexes were fairly evenly represented (52% male and 48% female). Most respondents were single (88%) and in their 20s (59%) or 30s (34%). Twenty-four of the respondents were married (11.9 %) and the rest (88.1 percent) were single.

A large proportion of the respondents was educated to undergraduate university level (50%) or had a postgraduate or professional qualification (31%). This implies that visitors to Cambodia from Western countries are better educated than average for those countries. Most respondents came from households with annual incomes of less than US$25,000 (40%) or between US$25-50,000 (34%), but a minority had higher incomes between US$50-75,000 (18%) and over US$75,000 (8%).

Respondents were resident in the United Kingdom (32%); Other Europe (25%), North America - Canada and the United States (22%), Australia and New Zealand (10%), North Asia – Japan and Korea (10%) Singapore (1%). The most common length of stay was between one week and three weeks, with 43% staying up to eight nights, 48% staying between nine and 21 nights, and the remaining 19% staying 22 nights or more. Most respondents travelled alone (30%) or with a partner (53%). Most of them came to Cambodia for pleasure and vacations (88%), with the remainder citing business, visiting friends and relatives or other personal reasons. Only a minority (21%) was travelling as part of an organised tour, with the majority (79%) travelling independently.

In general, the typical visitor to Cambodia is from the UK, Europe or the United States, single, aged in their 20s or 30s, with a university education, travelling independently either solo or as a couple.

In order to establish benefit segments, an initial factor analysis (FA) was carried out with each group of items in the 'Benefits', 'Vacation Activities', and 'Travel Philosophies' sections of the questionnaire. In each case, two dimensions were selected that explained 36%, 37% and

48% respectively of the variation in each group. None of the remaining dimensions contributed more than 6%, 6% and 7%, respectively. Varimax rotations were used to separate the dimensions as much as possible, and then they were examined to determine each dimension's interpretation.
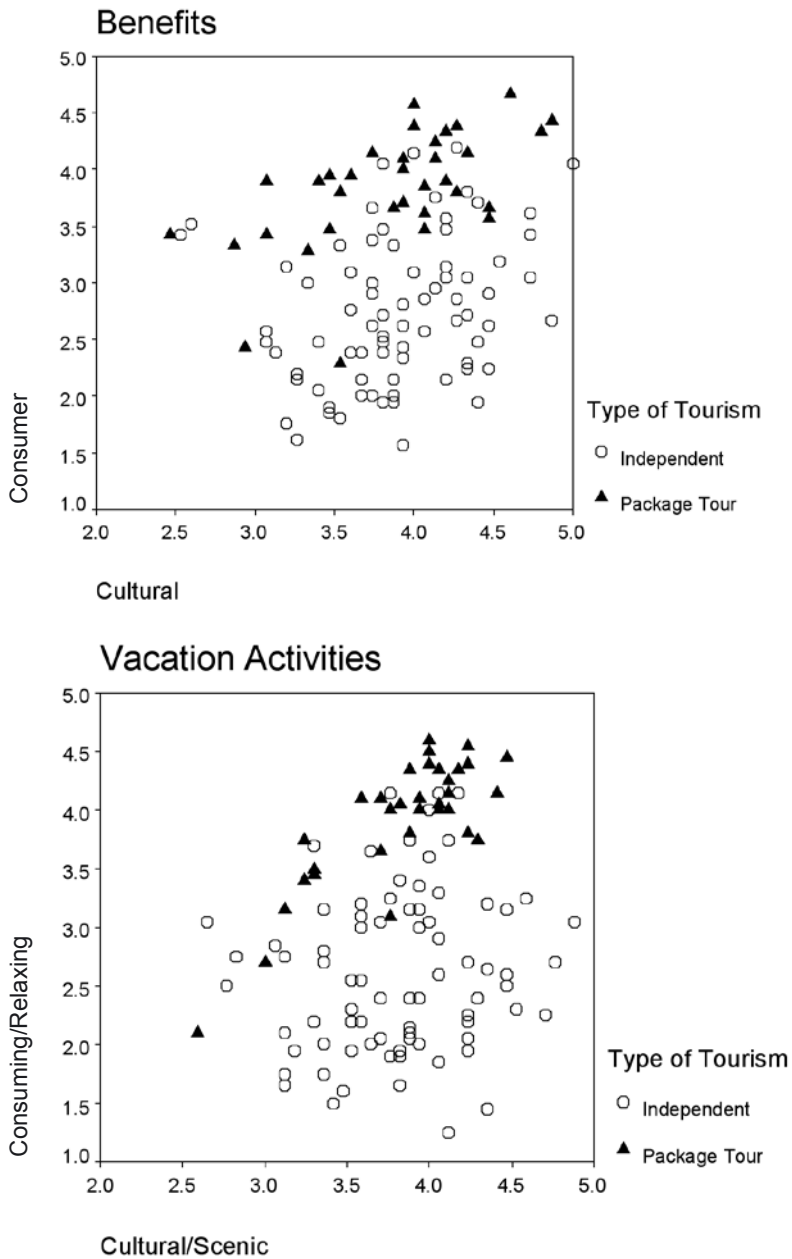
In the Benefits section, the first dimension consisted of statements relating to traditional holiday consumer benefits such as good food, comfortable hotels, competent guides, reliable and comfortable transportation and air conditioning: this dimension was thus labelled 'Consumer'. The second dimension consisted of statements related to the experiences of travelling to Cambodia, getting to know its history and culture and interacting with the local people: this dimension was labelled 'Cultural'.
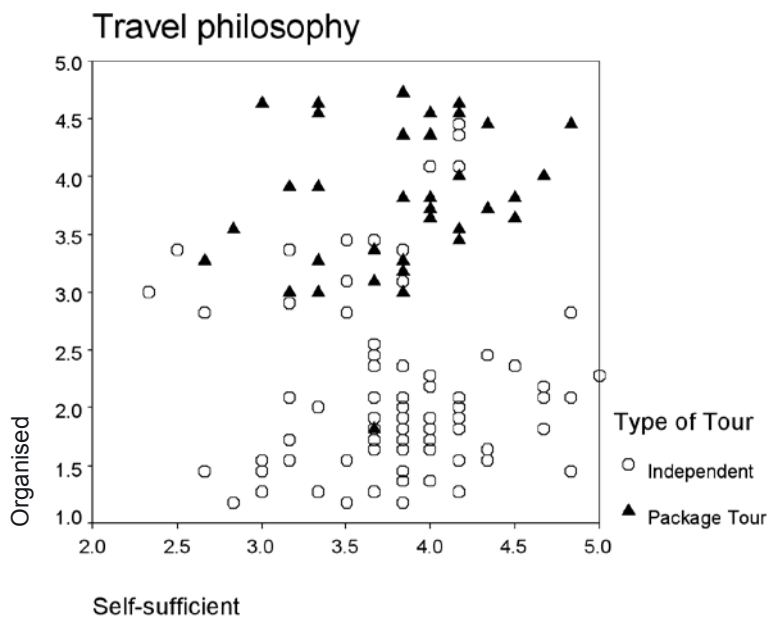
In the Vacation Activity section, the two dimensions were similar to those identified for the Benefits. The first dimension consisted of statements relating to 'consumer' activities such as shopping, sightseeing and fine dining: this dimension was labelled 'Consuming/Relaxing'. The second dimension consisted of statements about activities that involved interaction with the Cambodian people and culture, or experiencing the natural environment: this dimension was labelled 'Cultural/Scenic'.

In the Travel Philosophy section, the first dimension consisted of statements relating to an approach to travel that valued organised, stable and predictable holiday experiences such as pre-booked, all-inclusive packages: this dimension was labelled 'Organised'. The second dimension consisted of statements relating to an approach to travel that valued flexibility, novelty, self-sufficiency and value for money: this dimension was labelled 'Self-sufficient'.

These factor analyses result in each of the groups of questions – Benefits, Vacation Activities and Travel Philosophies – being summarised by two new variables, the dimensions shown in Figure 3. These new variables were then graphed against each other, using various demographic variables as markers. It became apparent that the only variable that obviously separated the respondents on the dimensions was the type of tourism – whether a 'package tour' or independent travel. Figure 3 shows the results of this visual analysis (which was supported by formal statistical comparisons).

Figure 3: Dimensions from Factor Analysis indicating Type of Tourism

Benefits

Vacation Activities

Travel philosophy

A cluster analysis (CA) was then carried out on the reduced data from the factor analysis dimensions using the 'two-step clustering' procedure in SPSS, with log-likelihood distance measure and the Bayesian Information Criterion (BIC) to automatically determine the optimum number of clusters. The procedure selected two clusters as the optimum number, with 155 (77%) in cluster one and 46 (23%) in cluster two. Results were almost identical from clustering with the original items as with the six dimensions determined by factor analysis (with only 2 of 201 cases classified differently). The clusters essentially corresponded to package and independent tourists, with only 5 of 43 package tourists classified in cluster one and 8 of 158 independent tourists classified in cluster two (see Table 2). Thus, it seemed quite reasonable to label cluster one as 'Independent' and cluster two as 'Package', while noting the small overlap.

Table 2: Type of Tour by Cluster

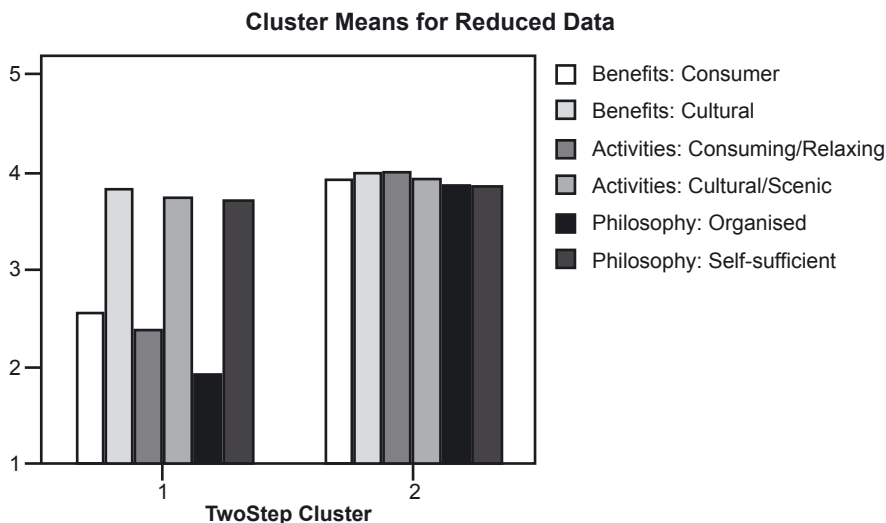|	Cluster		
	1 Independent	2 Package	Total
Package tour	5	38	43
Independent travel	150	8	158
Total	155	46	201

The centroids of the two clusters show the average level of response for each of the six dimensions. This information is shown numerically in Table 3 and graphically in Figure 4. It

can be clearly seen that there are significant differences between the 'Independent' cluster and the 'Package' cluster (essentially those travelling independently and those travelling on package tours) on all dimensions except the last (Philosophy: Self-sufficient). Those tourists on package tours rate traditional consumer comforts (ease, good food, competent guides, air conditioning, 'western' activities) much higher than those travelling independently. However, there is much less difference in their rating of traditional cultural activities (including the natural environment).

Table 3: Cluster means, standard deviations and significance of differences

	1 Independent		2 Package		
	Mean	SD	Mean	SD	Significance
Benefits: Consumer	2.57	0.53	3.93	0.35	$p < 0.001$
Benefits: Cultural	3.85	0.48	4.01	0.44	$p = 0.042$
Activities: Consuming/Relaxing	2.40	0.54	4.03	0.36	$p < 0.001$
Activities: Cultural/Scenic	3.74	0.49	3.96	0.31	$p < 0.001$
Philosophy: Organised	1.93	0.55	3.84	0.56	$p < 0.001$
Philosophy: Self-sufficient	3.74	0.59	3.87	0.43	$p = 0.106$

Figure 4. Cluster Means for Reduced Data

Appendices 1, 2 and 3 give details of cluster means and standard deviations for the original questionnaire items in each group of questions, Benefits, Activities and Philosophies, and

also the percentage of respondents in each cluster who marked the particular item as 'very important' (=5). The differences between the two clusters are marked on many of the items. Assessed by two-sample t-tests, there are statistically significant differences between the clusters on 28 of the 41 Benefits items (68%), on 34 of the 45 Activity items (76%) and on 15 of the 18 Philosophy items (83%). It seems apparent that people in cluster 2 (Package) like to be in places of entertainment, being served and with a guide, while people in cluster 1 (Independent) do not rate these characteristics highly. Table 4 gives details of some of the more significant findings, which shows similarities and differences between the two clusters

Table 4: Benefits; Activities; Travel Philosophies Significant Findings

Benefits	1 Independent		2 Package	
	Clus1 Mean	Clus1 SD	Clus2 Mean	Clus2 SD
Opportunity to increase one's knowledge about places, people and things	4.54	0.62	4.39	0.95
Nice weather	2.99	0.79	4.11	0.85
Environmental quality of air, water, and soil	3.12	1.10	4.17	1.04
Having fun, being entertained	3.14	1.08	4.22	0.92
Meeting people with similar interests	2.78	1.03	4.15	0.87
Activities				
Shopping	2.16	1.03	4.72	0.62
Enjoying ethnic/cultural events	3.92	0.81	4.15	0.84
Sunbathing or other beach activities	2.66	1.15	4.17	0.88
Sampling local foods	3.81	0.95	3.72	0.66
Visiting protect land/areas where animals/birds, marine life or vegetation are protected	3.77	0.84	4.17	0.93
Travel Philosophy				
It is important that the people I encounter on a holiday trip speak my language	2.18	1.13	4.11	0.99
I usually travel on all-inclusive package holidays	1.36	0.84	3.78	0.76
Once I get to my destination, I like to stay put	2.03	0.92	4.07	0.98
I like to have all my travel arrangements made before I start out on holiday	1.85	1.09	3.87	0.98
Whenever possible, I try to take my holidays at private resort "clubs"	1.19	0.49	3.61	1.32

Having identified the two clusters and looked at the differences between their views of tourism benefits, vacation activities and travel philosophies, we can also investigate differences between them in regard to the independent demographic variables and trip characteristics. Statistical differences between the clusters were assessed for age, sex, marital status, education, family income, trip length, party size, reason for visit and type of tour. Table 4 shows that significant differences were found for all these variables except education, although in some cases the significance was marginal (eg for party size) and in other cases the difference was small (eg for age), although statistically significant.

Table 5: Cluster Characteristics of Demographic Variables

	1 Independent	2 Package	Significance
Median age	27 yrs	29 yrs	p<0.001
Single	93%	72%	p<0.001
Median trip length	13 days	6 days	p<0.001
Package tour	3%	83%	p<0.001
Male	48%	67%	p=0.028
Median family income	US$32K	US$40K	p=0.030
Visit for pleasure	86%	91%	p=0.037
Mean party size	1.9	2.4	p=0.049
University education	86%	65%	p=0.151

People in cluster 1 are predominantly independent travellers, while those in cluster 2 are predominantly package tourists, as the cluster labels indicate. The independent travellers include an equal mix of males and females, and are more likely to be single, have a university education and somewhat lower family incomes than the package tourists. The package tourists are more likely to be male than female, and include more married couples than the independent travellers. They are likely to stay in Cambodia for around half the time that independent travellers stay. These demographic differences between the clusters can be useful for identifying market segments, but the most important difference is in the percentage of each group who are travelling on a package tour.

Additionally, the knowledge of the benefits desired by the two different clusters (or in other words, market segments) enables tourism marketers both in government and the private sector to develop products that can satisfy these needs.

CONCLUSIONS

This analysis has identified two clusters of benefit segments among international tourists to Cambodia - Independent and Package tourists. The clusters are so named as they overlap to

a great extent with the actual groupings of independent travellers and package tourists. The statistical viability of the segmentation approach was confirmed by conducting significance tests on the differences between the two clusters for attitudes towards benefits, vacation activities, travel philosophy and a variety of demographic and independent variables.

It is therefore concluded that, in addition to the differences in the benefits sought by the two clusters, they are also distinguishable in terms of their vacation activities and travel philosophies, and to a lesser extent by demographic and travel trip characteristics (aside from the obvious characteristic of being independent travellers or package tourists). The information contained in the tables and appendices in this paper can give marketers of Cambodian tourism insights into the two distinct types (or clusters) of tourists to Cambodia, the sorts of needs they have, and the stimuli to which they would respond. An important finding was that (despite some statistically significant differences) both groups have similar interests in the cultural aspects of tourism to Cambodia, so promotional messages on cultural experiences can be addressed to all types of visitors to Cambodia.

This establishment of these two discrete market segments for Cambodia and their differing needs gives the Cambodian Ministry of Tourism and tour operators to Cambodia information on which to base product development and promotional strategies, and therefore advance the Cambodian travel and tourism industry, both private and public. Judging by the rapid increase in tourism to Cambodia it appears that they have done so.

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APPENDIX 1: Cluster Information for Benefits Items

Benefits	Clus1 %5	Clus2 %5	Clus1 Mean	Clus1 SD	Clus2 Mean	Clus2 SD
Opportunity to increase one's knowledge about places, people and things	58	61	4.54	0.62	4.39	0.95
Outstanding scenery	15	17	3.78	0.75	3.85	0.70
Going places I have not visited before	35	54	3.94	1.05	4.30	0.87
Personal safety, even when travelling alone	31	28	3.83	1.00	3.78	0.99
Destination that provides value for my holiday money	21	37	3.61	0.95	4.00	1.05
Nice weather	1	33	2.99	0.79	4.11	0.85
Environmental quality of air, water, and soil	14	52	3.12	1.10	4.17	1.04
Standards of hygiene and cleanliness	10	48	3.19	0.95	4.24	0.90
Doing and seeing things which represent a destination's unique identity	32	41	4.06	0.87	3.76	1.23
Meeting new and different people	43	43	4.16	0.93	4.07	0.93
Visits to appreciate natural ecological sites like forests, wetlands, or animal reserves	30	26	3.83	1.01	3.76	1.02
Escaping from the ordinary	31	43	3.86	1.00	4.17	0.90
Interesting rural countryside	15	37	3.44	0.96	4.04	0.89
Availability of comprehensive pre-trip and in-country tourist information	1	46	2.88	0.86	4.17	0.88
Experiencing a new and different lifestyle	23	33	3.92	0.77	3.98	0.91
Having fun, being entertained	10	46	3.14	1.08	4.22	0.92
Getting a change from a busy job	25	39	3.27	1.35	3.89	1.10
Visiting place I can talk about when I get home	14	33	3.00	1.20	3.98	0.86
Good public transportation (such as airlines, public transit systems…)	6	43	2.96	0.94	4.15	0.94
Getting away from the demand of home	18	37	3.17	1.25	4.09	0.81
The best deal I could get	4	30	2.57	1.14	3.98	0.88
Finding thrills and excitement	10	41	2.97	1.09	3.93	1.12
Opportunity to see or experience unique or different aboriginal or indigenous peoples	19	37	3.76	0.99	3.91	0.98
Trying new foods	30	28	3.77	1.03	4.04	0.79
Exotic atmosphere	14	37	3.40	0.96	4.15	0.76
Historical or archaeological buildings and places	20	37	3.78	0.85	4.02	1.02

APPENDIX 1: Cluster Information for Benefits Items

Benefits	Clus1 %5	Clus2 %5	Clus1 Mean	Clus1 SD	Clus2 Mean	Clus2 SD
Opportunity to see and experience people from a number of ethnic background and nationalities	26	30	3.95	0.87	3.87	0.96
Ease of driving my own in the destination (e.g. Hiring a car, maps, etc.)	7	39	2.44	1.23	4.07	0.95
Meeting people with similar interests	6	39	2.78	1.03	4.15	0.87
Arts and cultural attractions (e.g. Live theatre, concerts, dance, opera, ballet)	7	35	2.93	1.03	3.96	0.92
Shopping	4	48	2.34	1.02	4.28	0.89
Just relaxing	12	33	3.11	1.07	3.91	1.05
Doing nothing at all	6	37	2.25	1.18	3.74	1.12
Experiencing a similar lifestyle	5	28	1.94	1.23	3.93	0.95
Being together as a family	3	46	2.08	1.12	4.15	0.92
Outdoor activities such as hiking, climbing	9	43	3.15	1.10	3.63	1.55
Going places my friends have not been	6	13	2.21	1.13	3.28	1.28
Activities for the entire family	4	37	1.85	1.06	3.63	1.44
Visiting friends and relatives	2	24	1.95	0.92	3.43	1.34
Indulging in luxury (such as luxury hotels or fine dining)	0	22	1.48	0.78	3.39	1.37
Primitive outdoor camping/tenting experience	8	39	2.59	1.17	3.70	1.46

APPENDIX 2: Cluster Information for Vacation Activities Items

Activities	Clus1 %5	Clus2 %5	Clus1 Mean	Clus1 SD	Clus2 Mean	Clus2 SD
Shopping	2	80	2.16	1.03	4.72	0.62
Sampling local foods	25	9	3.81	0.95	3.72	0.66
Taking pictures or filming	17	63	3.70	0.94	4.41	0.98
Getting to know local people	41	20	4.22	0.81	3.74	0.85
Informal or casual dining with table service	5	46	2.72	1.14	4.20	0.86
Seeing big modern cities	1	37	2.22	0.96	4.15	0.79
Visits to appreciate natural ecological sites like forests, wetlands, or animal reserves	23	30	3.86	0.87	3.93	0.88
Visiting national parks and forests	21	41	3.89	0.81	4.17	0.88
Enjoying ethnic/cultural events	23	37	3.92	0.81	4.15	0.84
Swimming	5	48	2.87	0.99	4.02	1.20
Sightseeing in cities	3	24	3.15	1.01	3.67	1.01
Dining in fast food restaurants or cafeterias	4	41	1.72	1.05	4.00	1.05
Observing wildlife/bird watching	6	48	2.94	1.09	4.09	1.09
Sunbathing or other beach activities	5	46	2.66	1.15	4.17	0.88
Visiting museums/galleries	9	39	3.37	0.81	4.13	0.81
Short guided excursion/tour	6	39	2.89	1.01	3.98	0.98
Local crafts and handiwork	5	46	3.05	0.86	4.28	0.78
Visiting small towns and villages	24	52	3.99	0.73	4.26	0.88
Arts and cultural attractions (e.g. Live theatre, concerts, dance, opera, ballet)	10	67	3.06	1.11	4.52	0.78
See or experience people from a number of different ethnic backgrounds or nationalities	29	30	3.85	1.07	3.59	1.27
Dining in fine restaurants	2	26	1.85	0.91	3.78	0.99
See or experience unique or different aboriginal or indigenous peoples (e.g. Tribal Khmer)	18	24	4.01	3.35	3.85	0.84
Visiting protect land/areas where animals/birds, marine life or vegetation are protected	21	43	3.77	0.84	4.17	0.93
Visiting night clubs or other places of entertainment (e.g. Bars, discos, dancing, etc)	5	30	2.66	1.16	3.87	1.02

APPENDIX 2: Cluster Information for Vacation Activities Items

Activities	Clus1 %5	Clus2 %5	Clus1 Mean	Clus1 SD	Clus2 Mean	Clus2 SD
Driving to scenic places	12	63	3.32	1.09	4.48	0.75
Visiting friends or relatives	0	30	2.18	1.07	3.70	1.05
Visiting scenic landmarks	18	52	3.71	0.81	4.26	0.91
Visiting remote coastal attractions like fishing villages or lighthouses	17	13	3.55	0.96	3.57	0.86
Taking a cruise for a day or less	1	26	2.65	1.10	3.89	0.92
Visiting places of historical interest	23	48	3.85	0.83	4.17	0.93
Attending local festivals/fairs/other special events	20	46	3.75	0.99	4.13	0.98
Visiting theme parks or amusement parks	3	37	1.89	1.07	4.15	0.79
Outdoor activities such as climbing, hiking, etc.	19	33	3.54	1.12	3.89	0.99
Visiting mountainous areas	20	35	3.66	1.04	3.98	0.91
Visiting places with religious significance (e.g. Churches, pagodas, temples)	14	33	3.58	0.83	3.80	1.15
Water sports (e.g. Water skiing, sailing, canoe)	8	26	2.70	1.28	3.85	0.94
Taking a nature and/or science learning trip	6	22	2.94	1.05	3.54	1.13
Walking tours	6	22	3.22	1.00	3.59	1.02
Diving (snorkelling or scuba)/surfing	12	37	2.83	1.35	3.80	1.17
Golfing/tennis	3	15	1.66	1.10	3.48	0.96
Bicycle riding (touring, mountain, day trips)	8	41	3.11	1.14	4.04	0.97
Visiting places of archaeological interest	20	17	3.59	1.03	3.74	0.93
Visiting casinos and other gambling	1	50	1.49	0.91	4.11	1.08
Attending spectator sporting events	3	43	2.06	1.19	4.24	0.79
Staying in campgrounds or trailer parks	5	59	2.22	1.17	4.46	0.72

APPENDIX 3: Cluster Information for Travel Philosophy Items

	Clus1 %5	Clus2 %5	Clus1 Mean	Clus1 SD	Clus2 Mean	Clus2 SD
Getting value for my holiday money is very important to me	16	37	3.30	1.03	3.80	1.31
I like to be flexible on my long-haul holiday going where and when it suits me	33	13	3.59	1.41	3.61	0.88
When travelling long-haul I usually take holidays of 14 days or less	7	39	2.18	1.31	4.15	0.82
For me, the money spent on long-haul travel is well spent	26	26	3.95	0.81	3.87	0.91
I like to go to a different place on each new holiday trip	25	41	3.81	0.97	4.07	1.00
Inexpensive travel to the destination country is important to me	21	28	3.61	1.04	3.98	0.88
I like to have all my travel arrangements made before I start out on holiday	5	30	1.85	1.09	3.87	0.98
I enjoy making my own arrangements for my holidays	35	22	4.16	0.73	3.87	0.75
Once I get to my destination, I like to stay put	1	39	2.03	0.92	4.07	0.98
I prefer to take extended holidays in warm destinations to escape winter	9	37	2.80	1.14	4.02	0.95
It is important that the people I encounter on a holiday trip speak my language	5	50	2.18	1.13	4.11	0.99
I usually travel on all-inclusive package holidays	2	11	1.36	0.84	3.78	0.76
I prefer to go on guided tours when taking long-haul holidays	1	39	1.67	0.83	4.00	0.92
I don't consider long-haul trips unless I have at least four weeks to travel	12	41	2.77	1.25	4.13	0.98
I usually take more than one long-haul holiday per year	5	20	2.21	1.15	2.89	1.39
I do not really like to travel	3	22	1.52	1.00	3.24	1.23
Long-haul travel is more of a hassle than a holiday	4	22	1.69	1.10	3.28	1.24
Whenever possible, I try to take my holidays at private resort "clubs"	0	35	1.19	0.49	3.61	1.32