

# BBG Research Series



GALLUP®



## Cambodia: From Big Screen to Small

# Cambodia at a Glance

Findings from the World Poll



# Quality of Life in Cambodia

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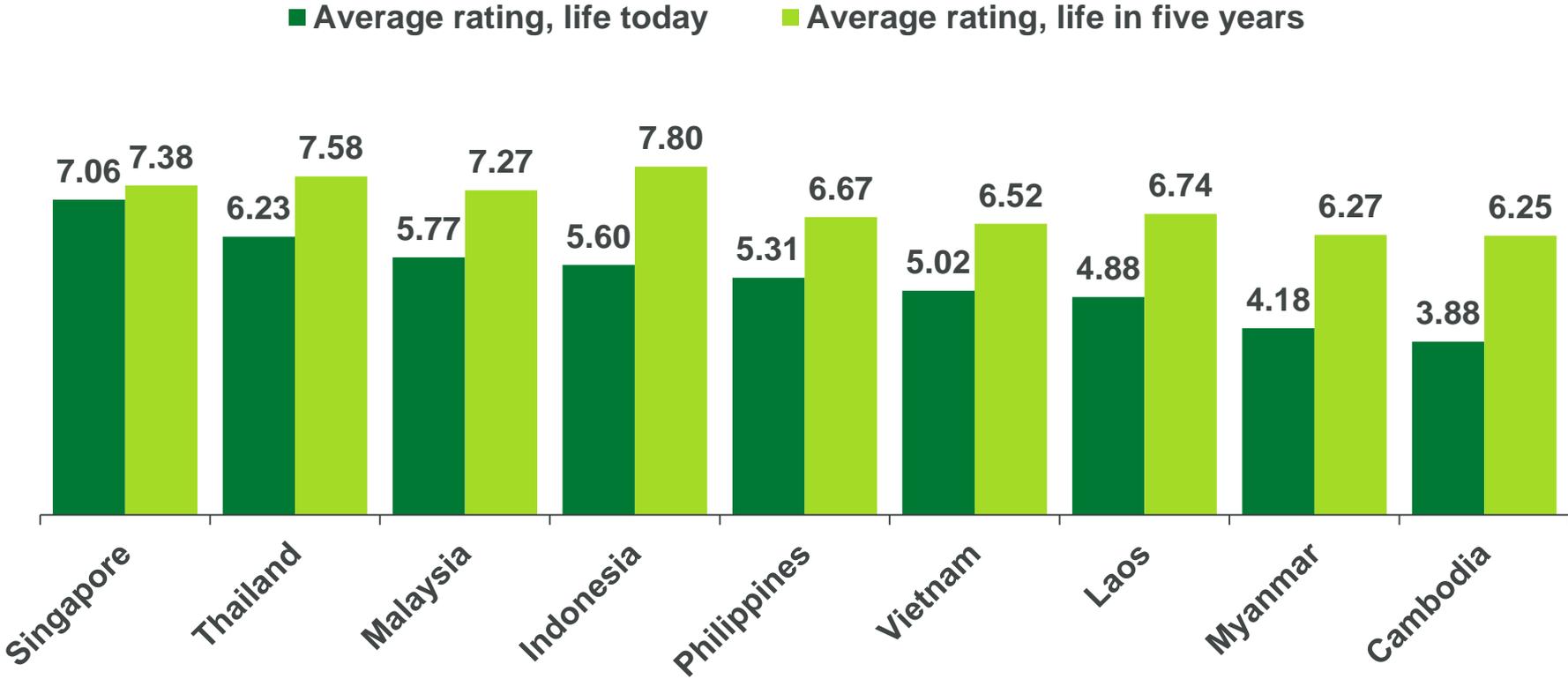
**We will look at several indicators of well-being in Cambodian society:**

- **Life evaluations**
- **Job market**
- **Access to food and shelter**
- **Prevalence of corruption in business and government**
- **Security from crime and violence**

**As well as media freedom in the country and the region.**

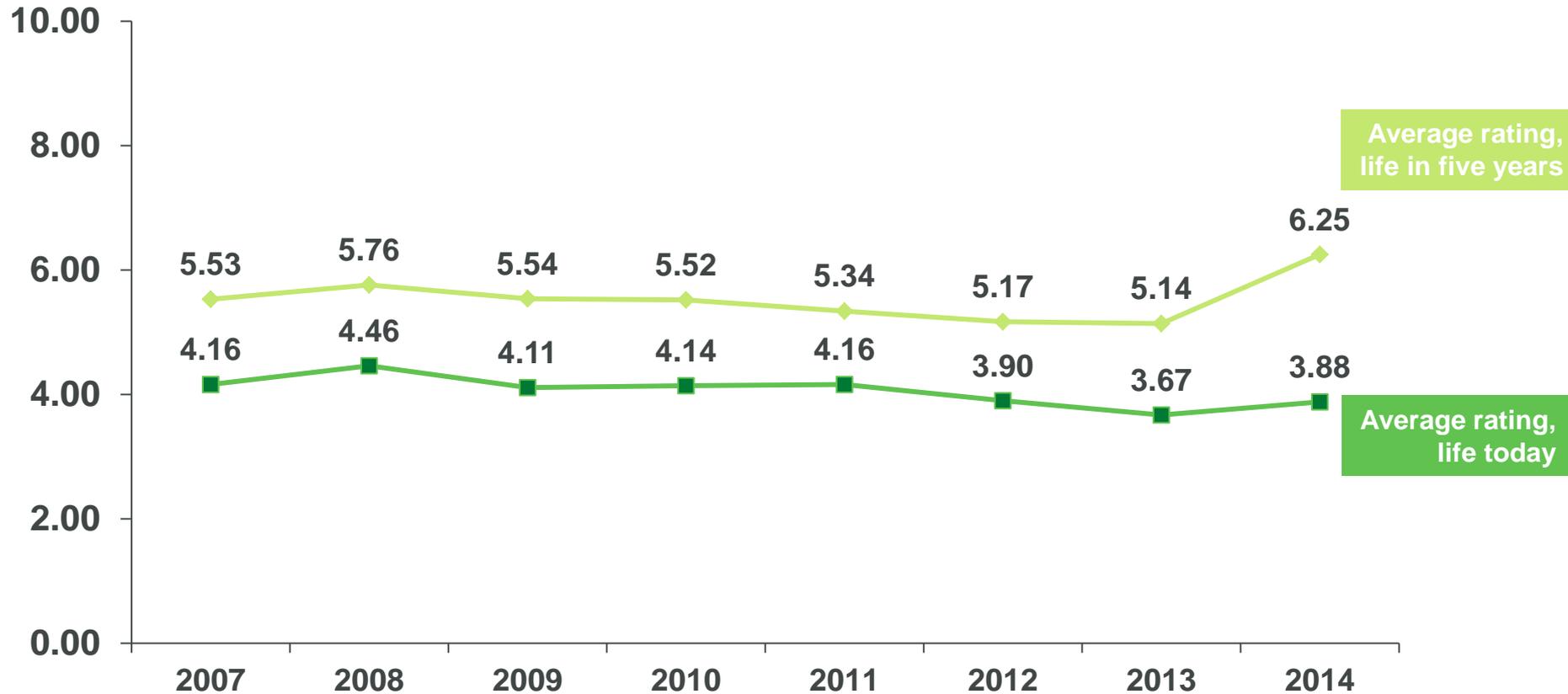
# Cambodia's Life Ratings Lowest Among SE Asian Countries

Please imagine a ladder with steps numbered from 0 at the bottom to 10 at the top. On which step of the ladder would you say you personally feel you stand at this time, assuming that the higher the step the better you feel about your life, and the lower the step the worse you feel about it?



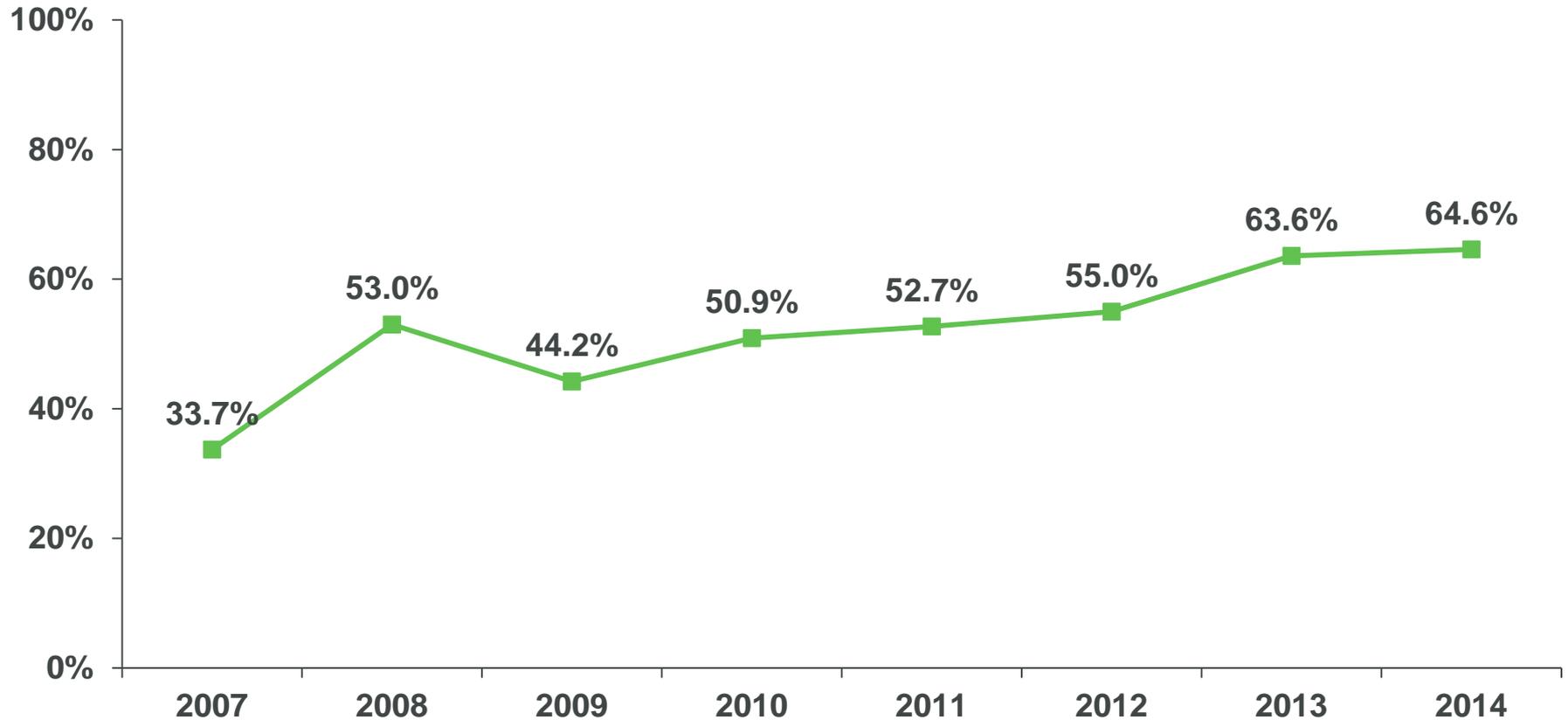
# Cambodians' Ratings of Their Current and Future Lives

Please imagine a ladder with steps numbered from 0 to 10. On which step would you say you currently stand? On which step do you think you will stand 5 years from now?



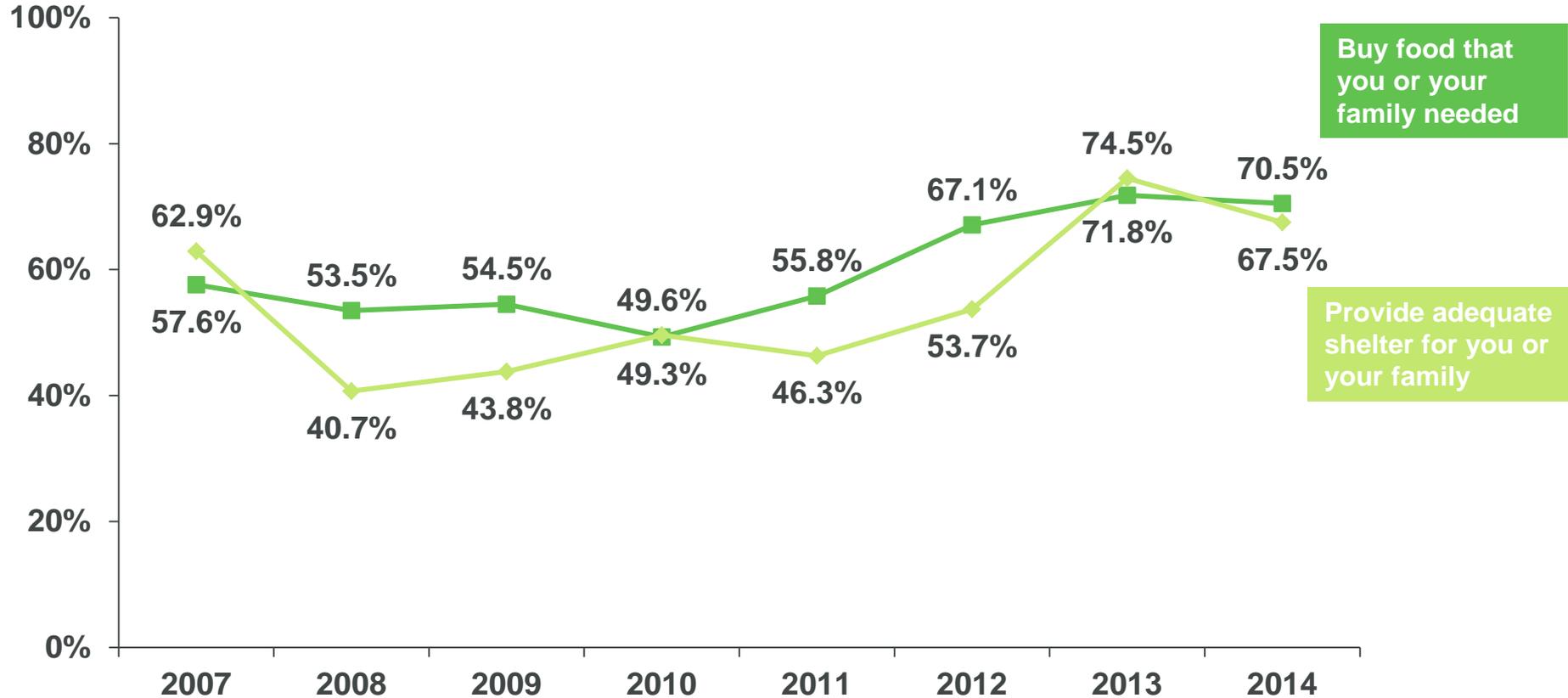
# Perceptions of Local Job Markets Have Steadily Improved

*Thinking about the job situation in the city or area where you live, is now a good time or bad time to find a job? (% "Good time to find a job")*



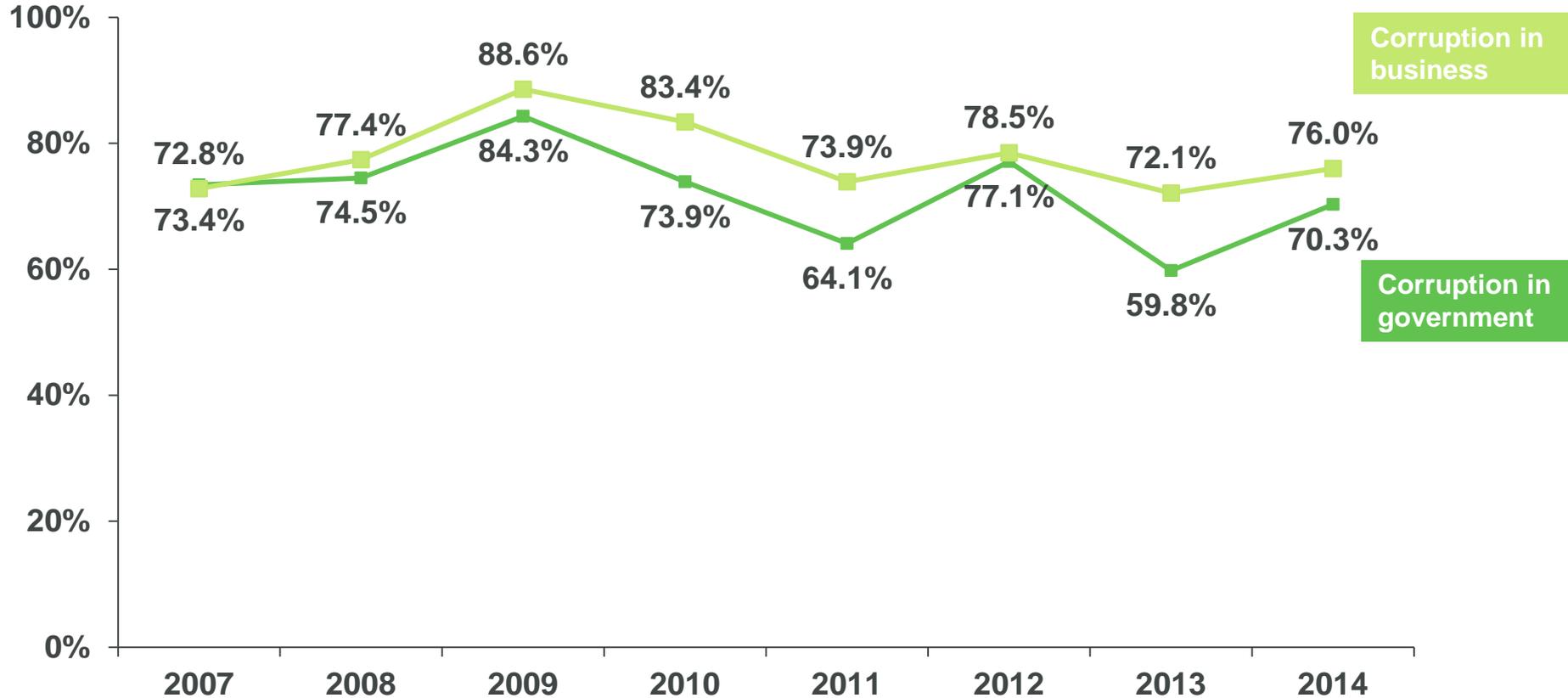
# Most Cambodians Have Trouble Meeting Basic Needs

Have there been times in the past 12 months when you did not have enough money to \_\_\_\_\_? (% Yes)



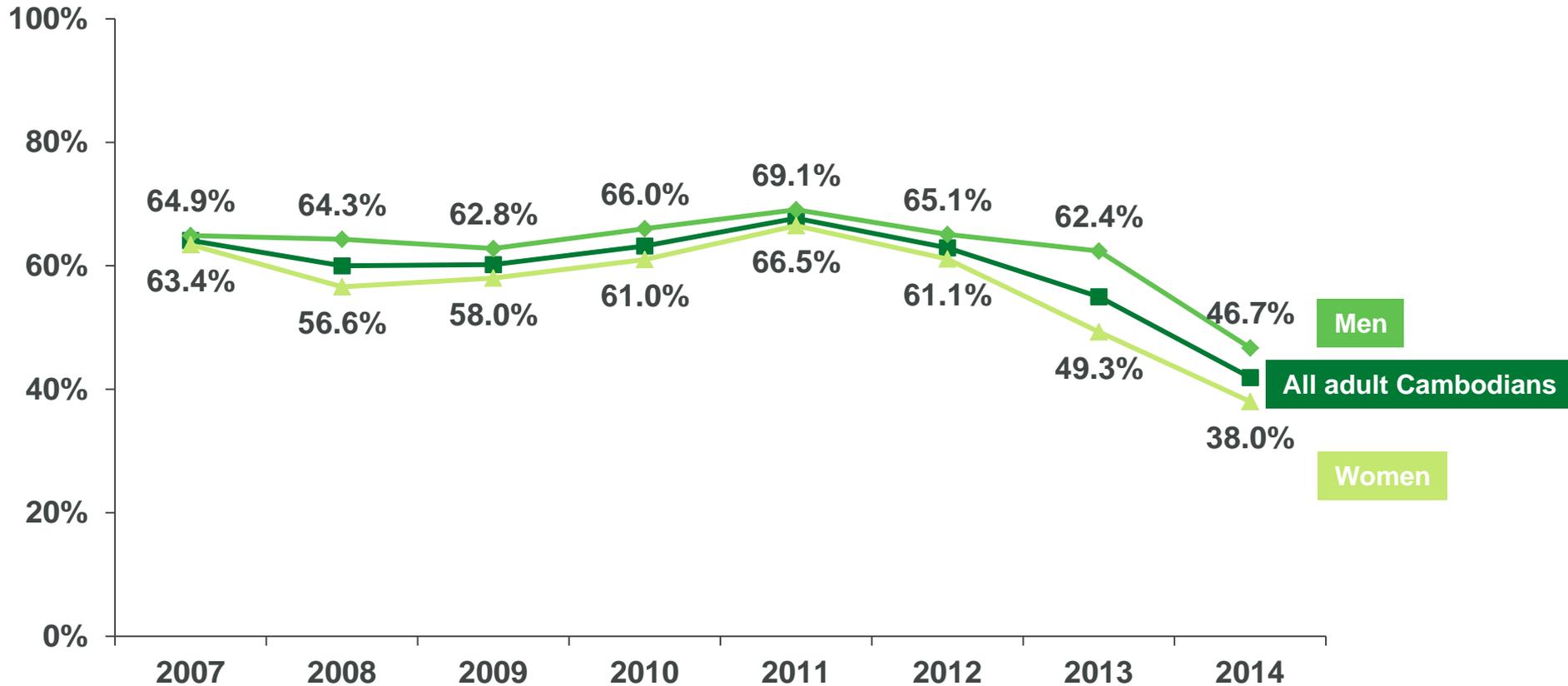
# Most Cambodians Believe Corruption is Widespread in Businesses and Government

Is corruption widespread throughout the government/business in this country? (%Yes)



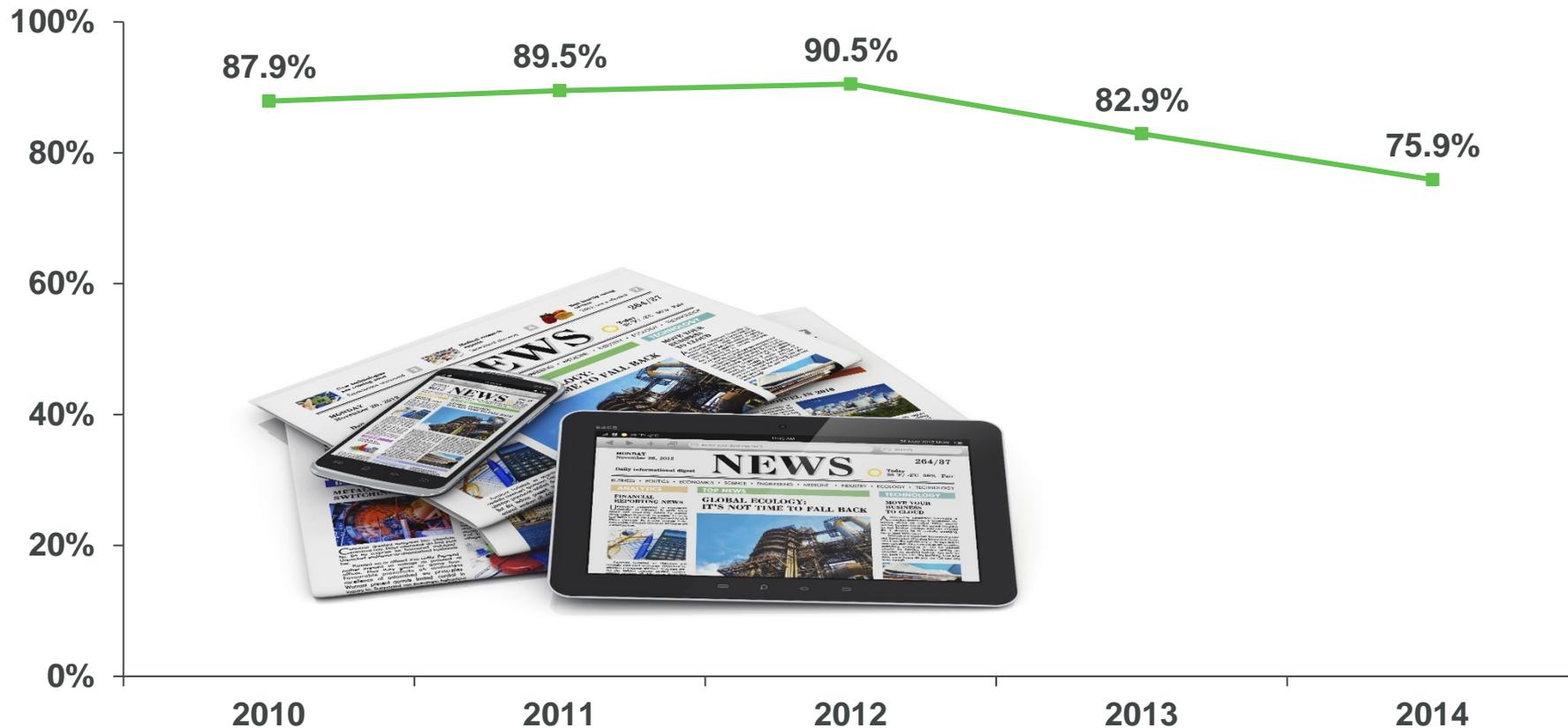
# Feelings of Personal Safety Have Fallen Sharply Since 2011

*Do you feel safe walking alone at night in the city or area where you live? (% Yes “feel safe”)*



# Cambodians Are Less Likely Than in 2012 to Say Media Have A lot of Freedom

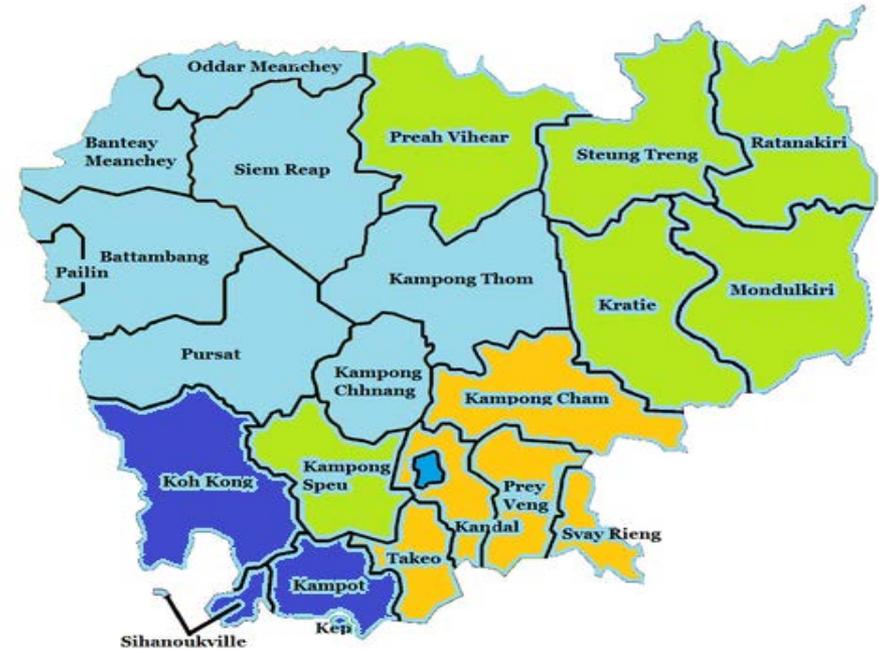
Do the media in this country have a lot of freedom, or not? (%Yes)



# Media Survey in Cambodia

# National Survey Background

- Face-to-face survey of 2,000 randomly selected adults (15+) in Cambodia, covering all 24 provinces
  - Nationally representative of more than 9.5 million adults
- Conducted June 5 – 25, 2014
- Average length of questionnaire: 47 minutes
  - 54.6% response rate
- Research Objective: Assess the evolving media environment



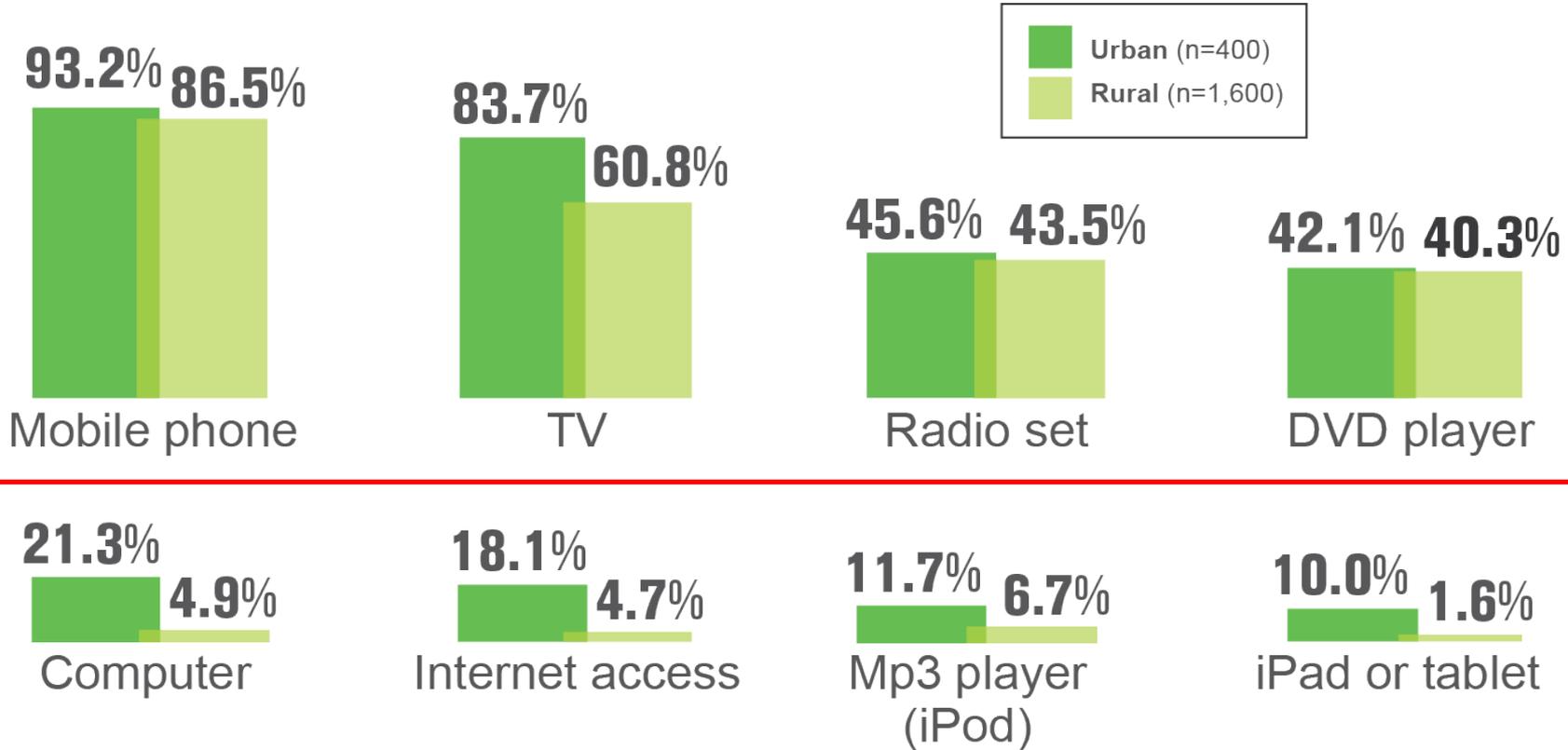


## Computer-Assisted Personal Interviewing (CAPI) in Cambodia

- Shorter interviewing time
- Improved interview experience
- Automated process allowed data precision
- GPS coordinates

# Mobile Phone Ownership is Ubiquitous

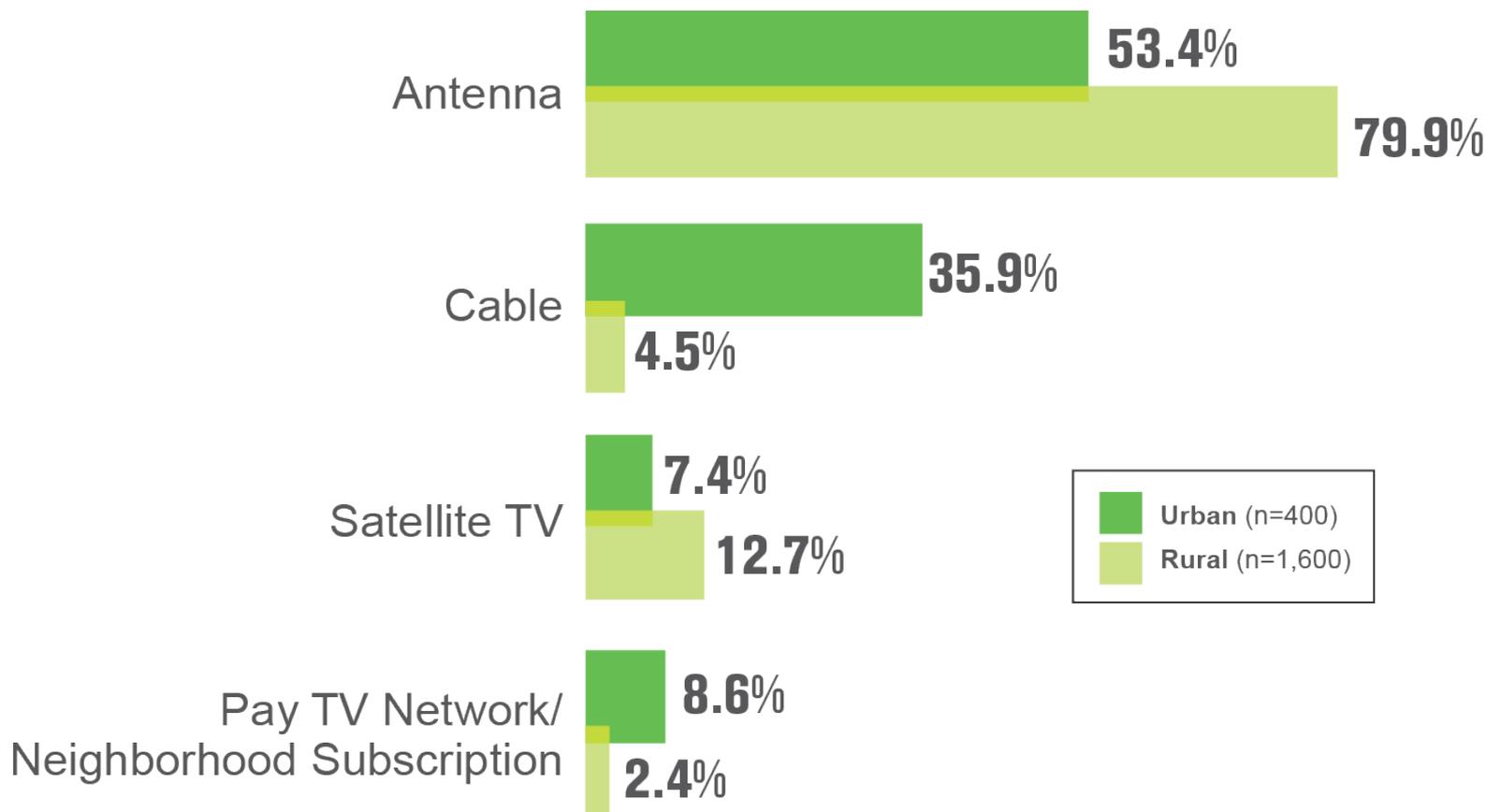
Which of the following do you have working in your household?



(Base: Total respondents, n=2,000)

# Types of Television Signals

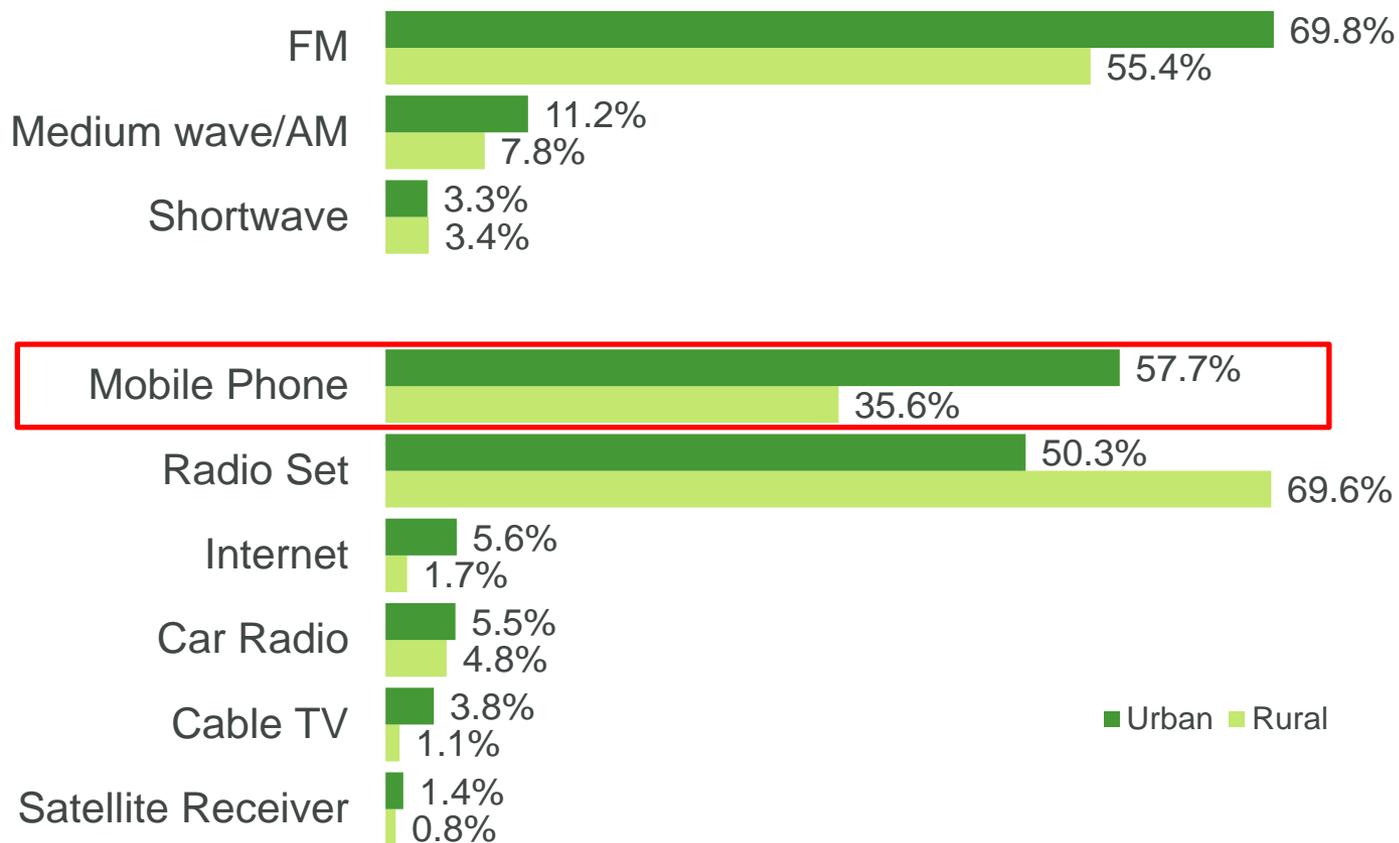
How does your television receive its signal? Does it receive it with the help of ...



(Base: Television owners, n=1,573)

# Radio

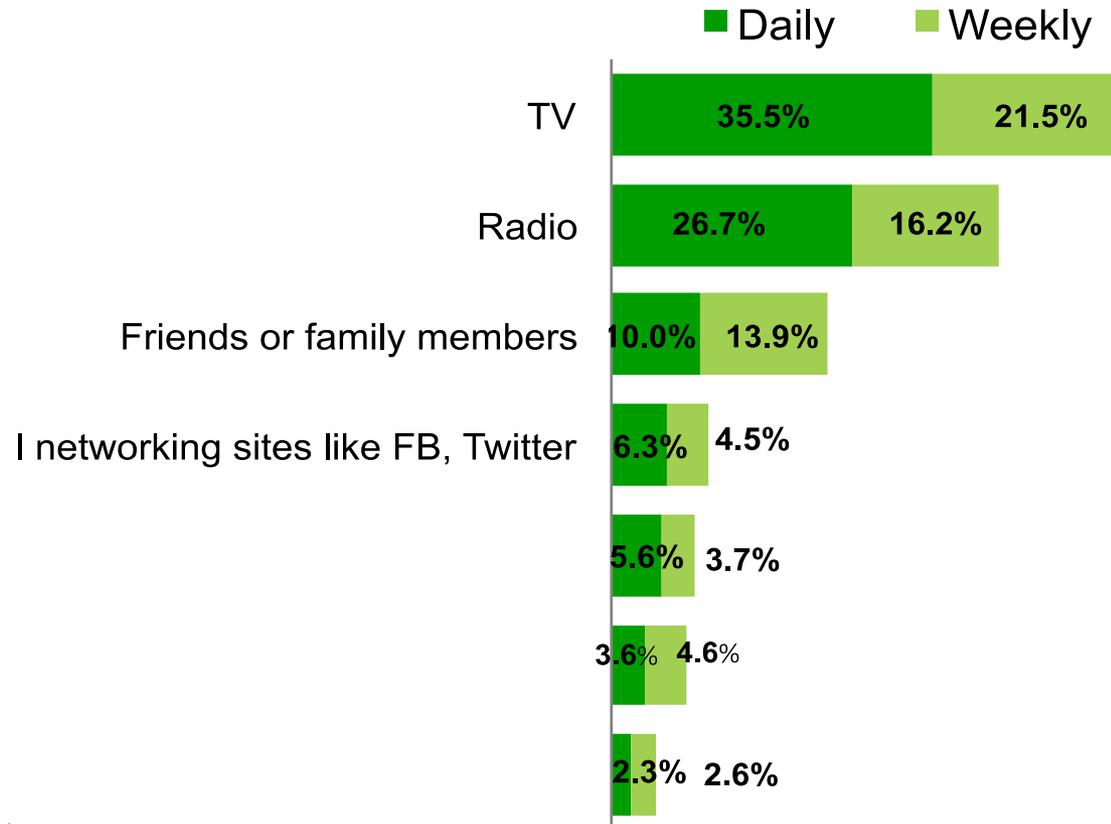
*% using each waveband/method to listen to the radio in the past week*



(Base: Past-week radio listeners, n=1,092)

# Sources of News and Information

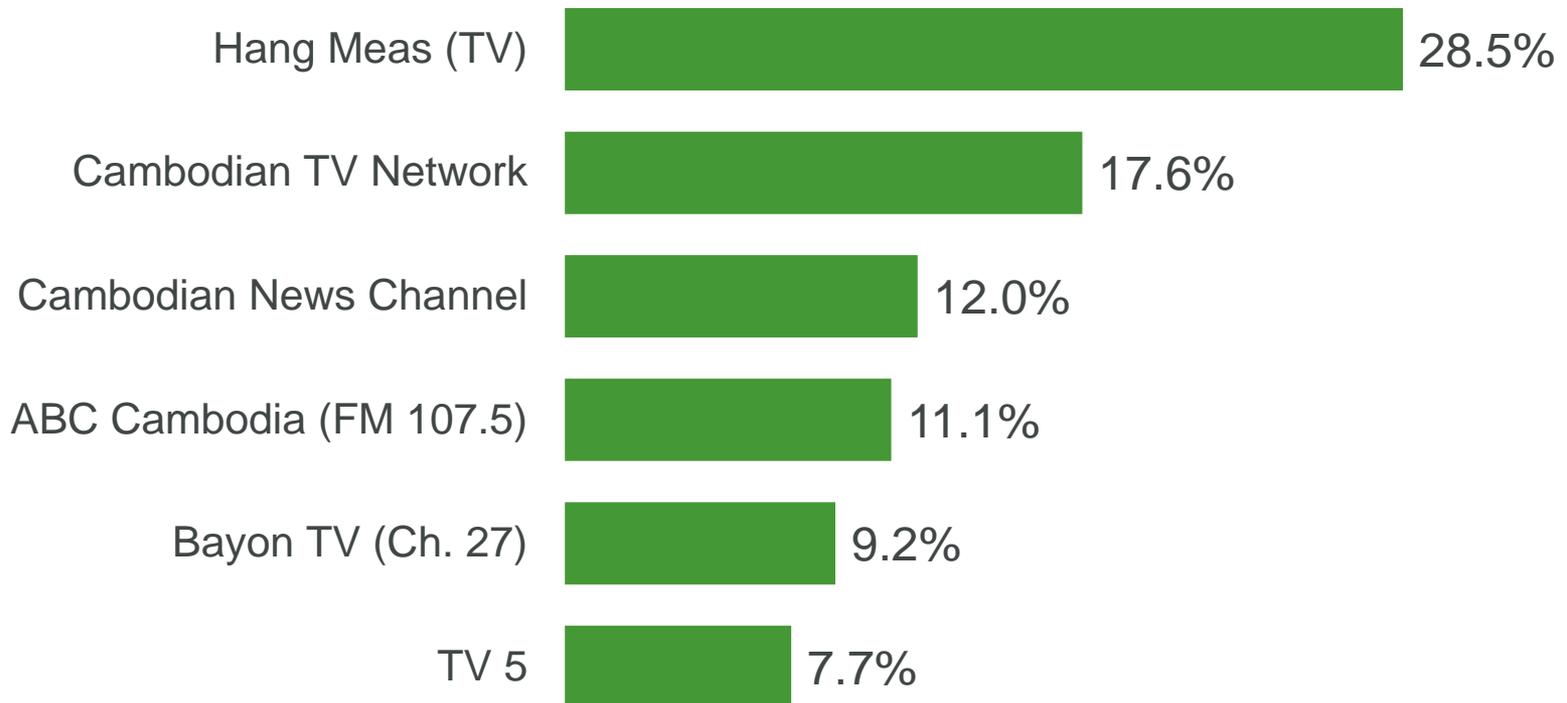
For each of the following sources I mention, please tell me how often you use that source to get news.



(Base: Total respondents, n=2,000)

# Most Important News Sources

*Please think about all of the television stations, radio stations, newspapers, magazines, or Internet sites you use to get news about current events. What is the name of the station, publication, or site that is your MOST important source of information?*



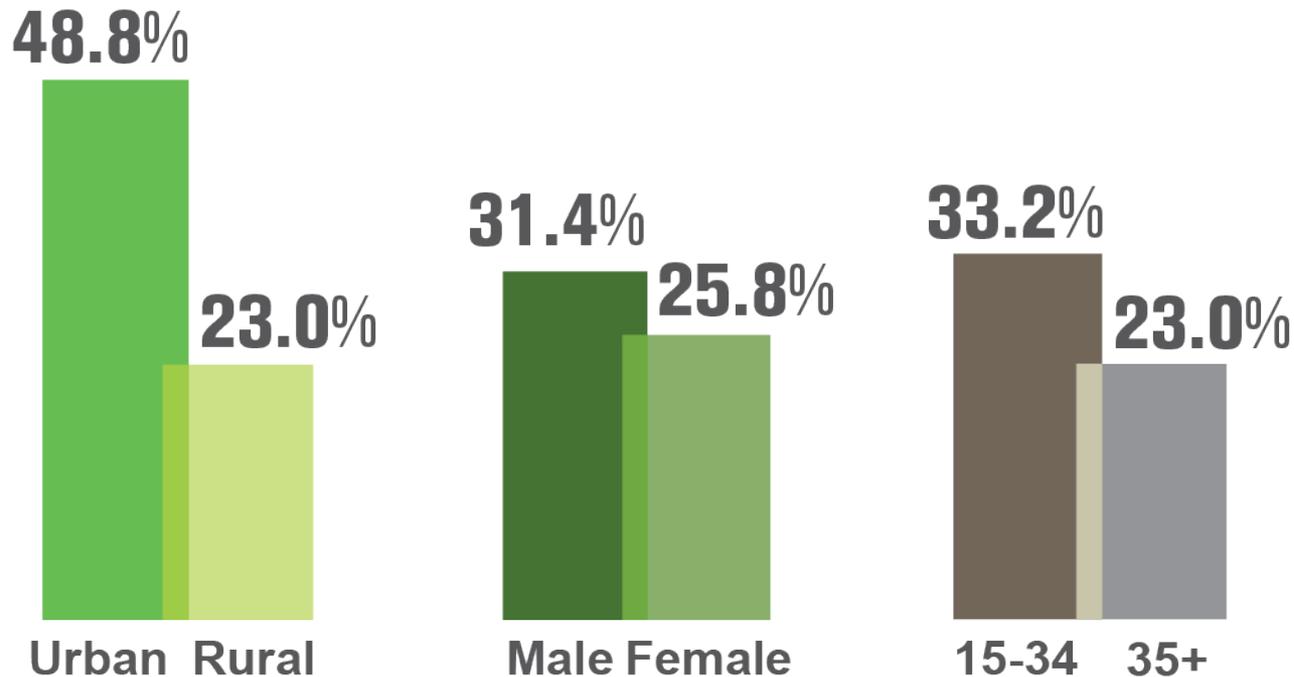
(Base: Total respondents, n=2,000)

# Hang Meas TV



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Please think about all of the television stations, radio stations, newspapers, magazines, or Internet sites you use to get news about current events. What is the name of the station, publication, or site that is your MOST important source of information?

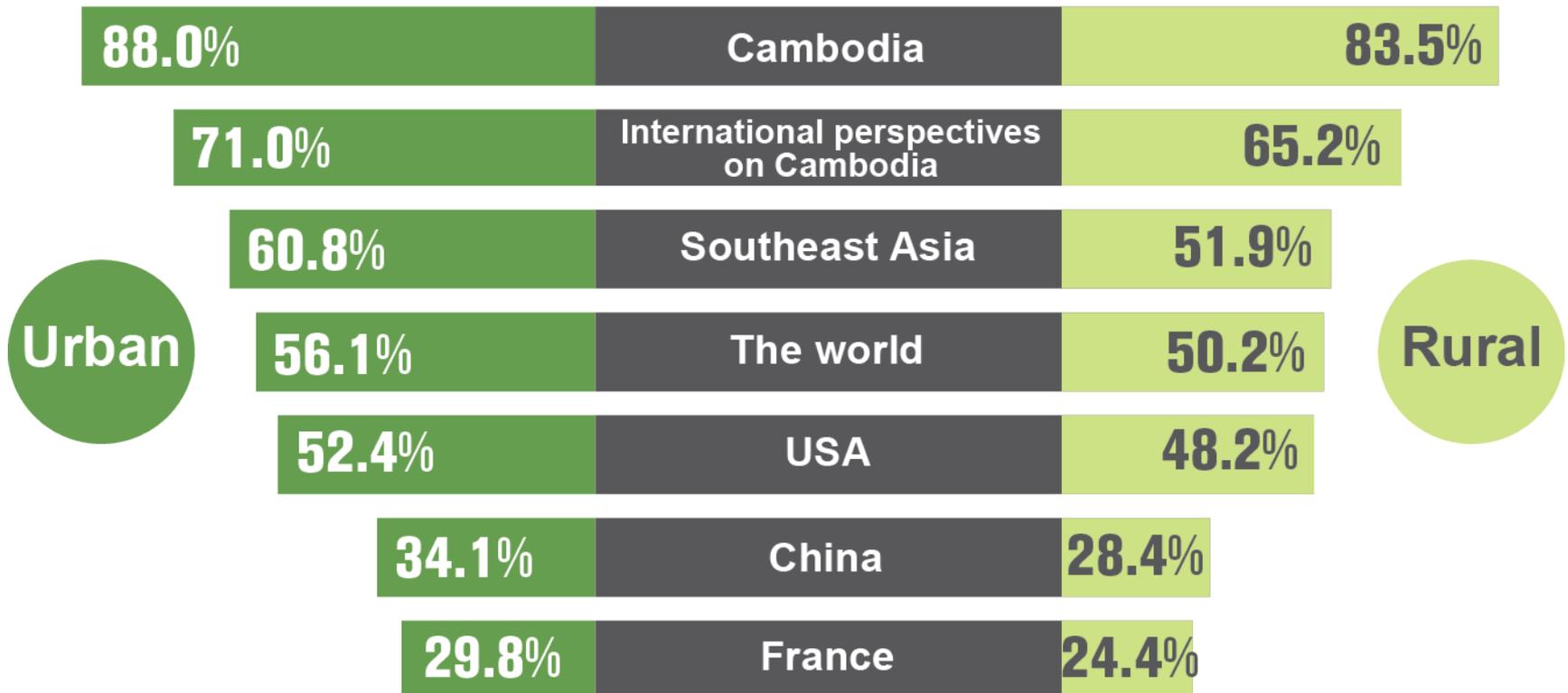


(Base: Total respondents, n=2,000)

# Types of News Interested

How interested are you in each of the following types of news?

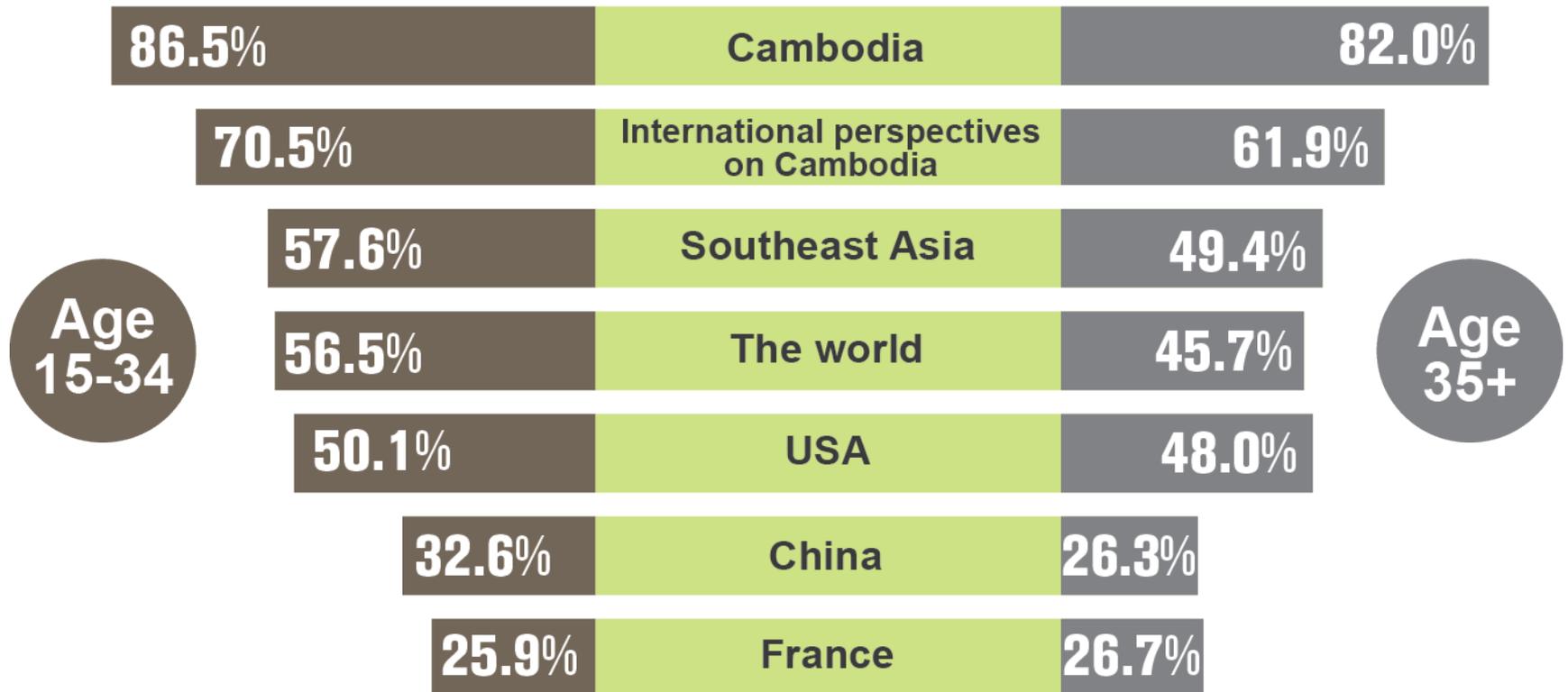
## % Very, Somewhat Interested



# Types of News Interested

How interested are you in each of the following types of news?

## % Very, Somewhat Interested



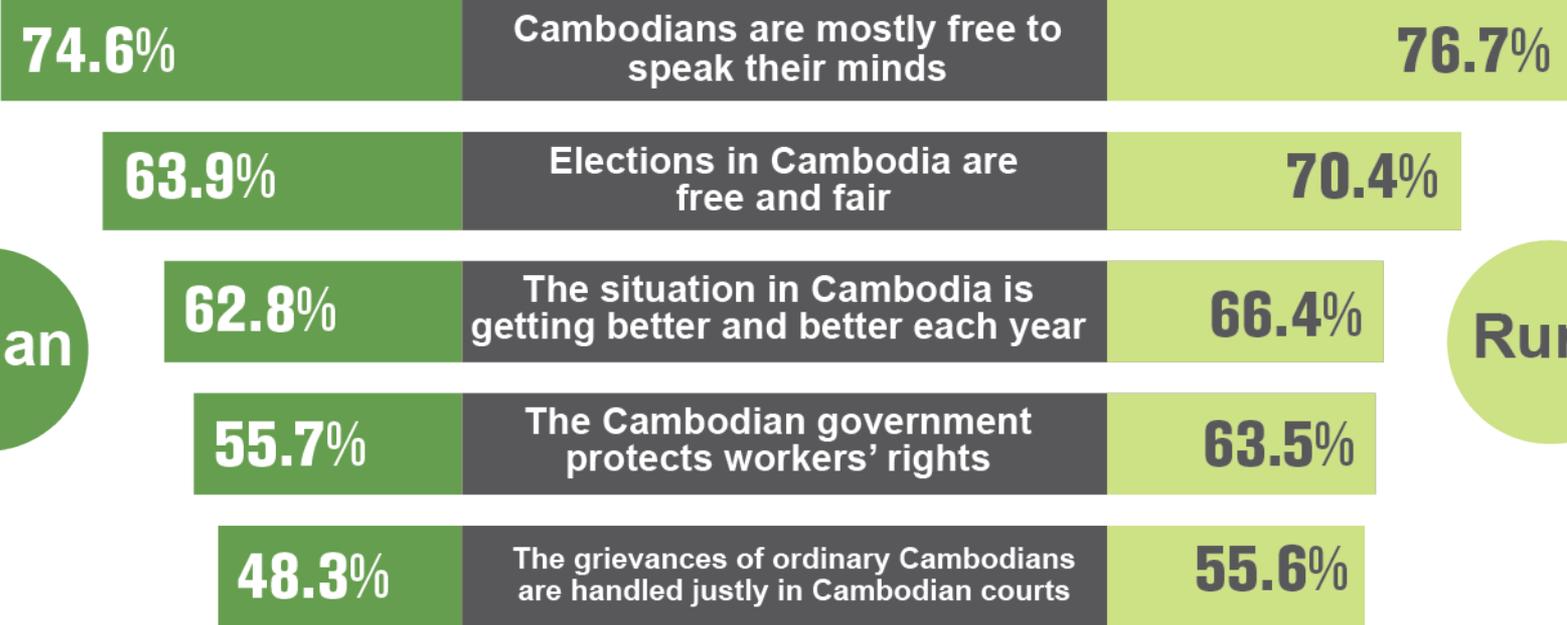
# Sentiments Toward the State of the Society

Now I will read you some general statements on a wide range of issues. Please tell me whether you agree strongly, agree somewhat, neither agree nor disagree, disagree somewhat, or disagree strongly with each statement.

## % Agree Strongly/Somewhat

Urban

Rural



# Sentiments Toward the State of the Society

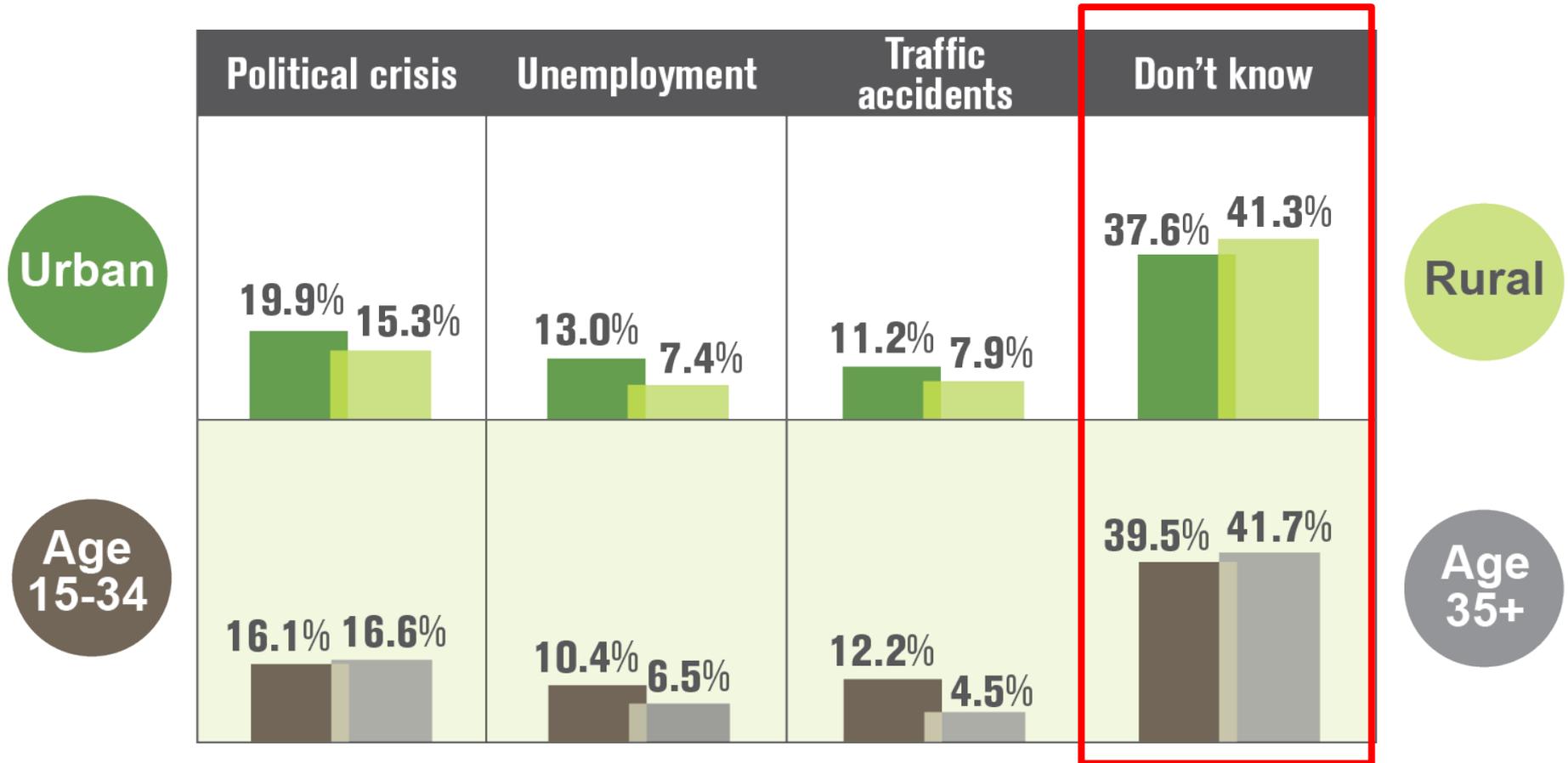
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## % Agree Strongly/Somewhat



# Most Serious Problems Facing Cambodia

Please tell me what, in your opinion, are the three most serious problems facing Cambodia. Asked on open-ended basis. Top 3 most commonly mentioned problems.

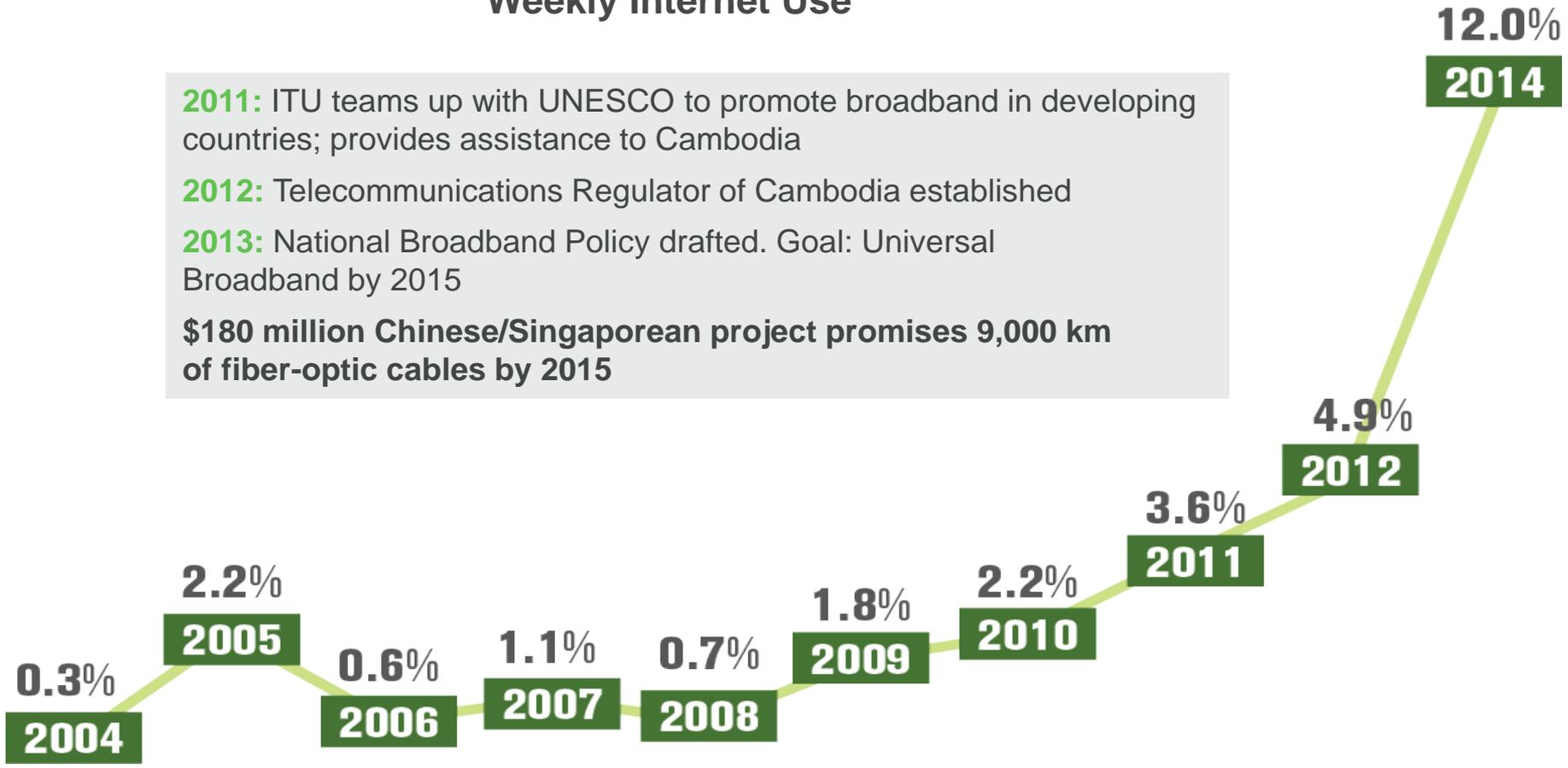




# New Media Use

# Cambodia's Weekly Internet Use Since 2004

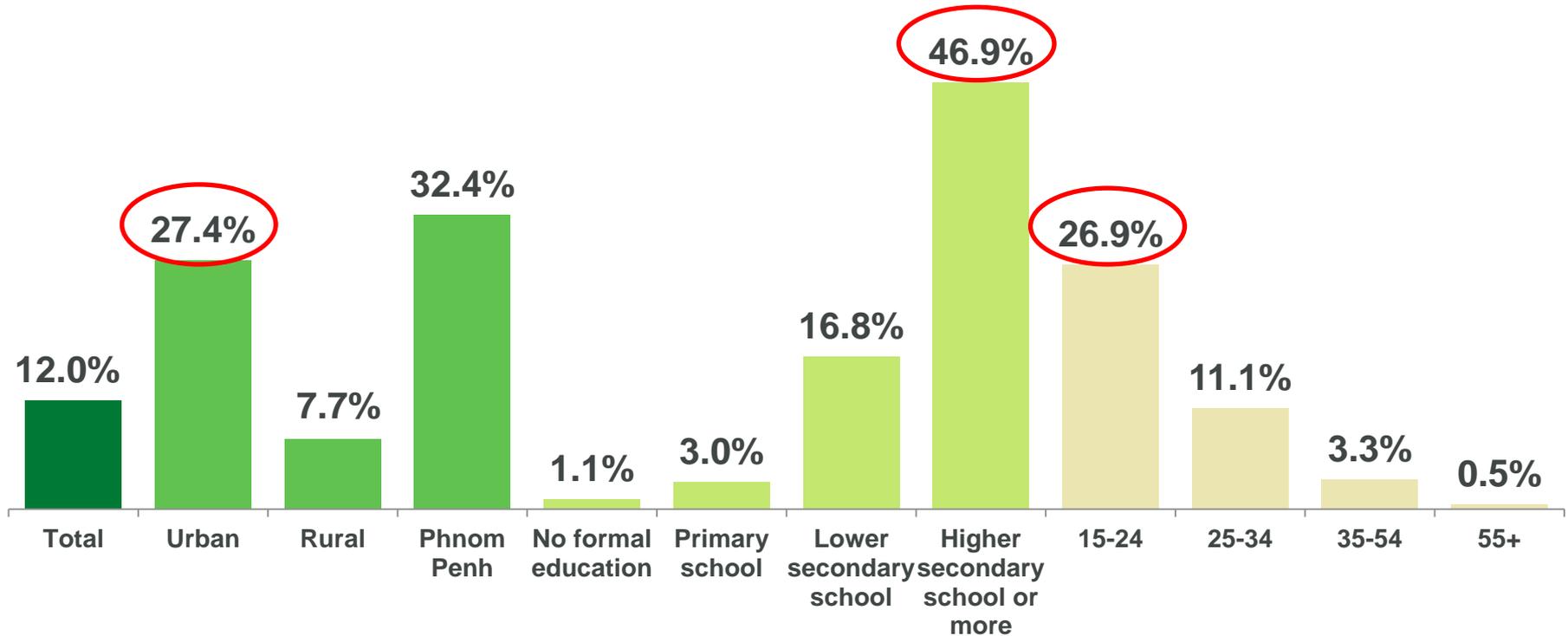
## Weekly Internet Use



Source: National surveys of Cambodia conducted through the BBG's International Audience Research Program

# Who Uses the Internet in Cambodia?

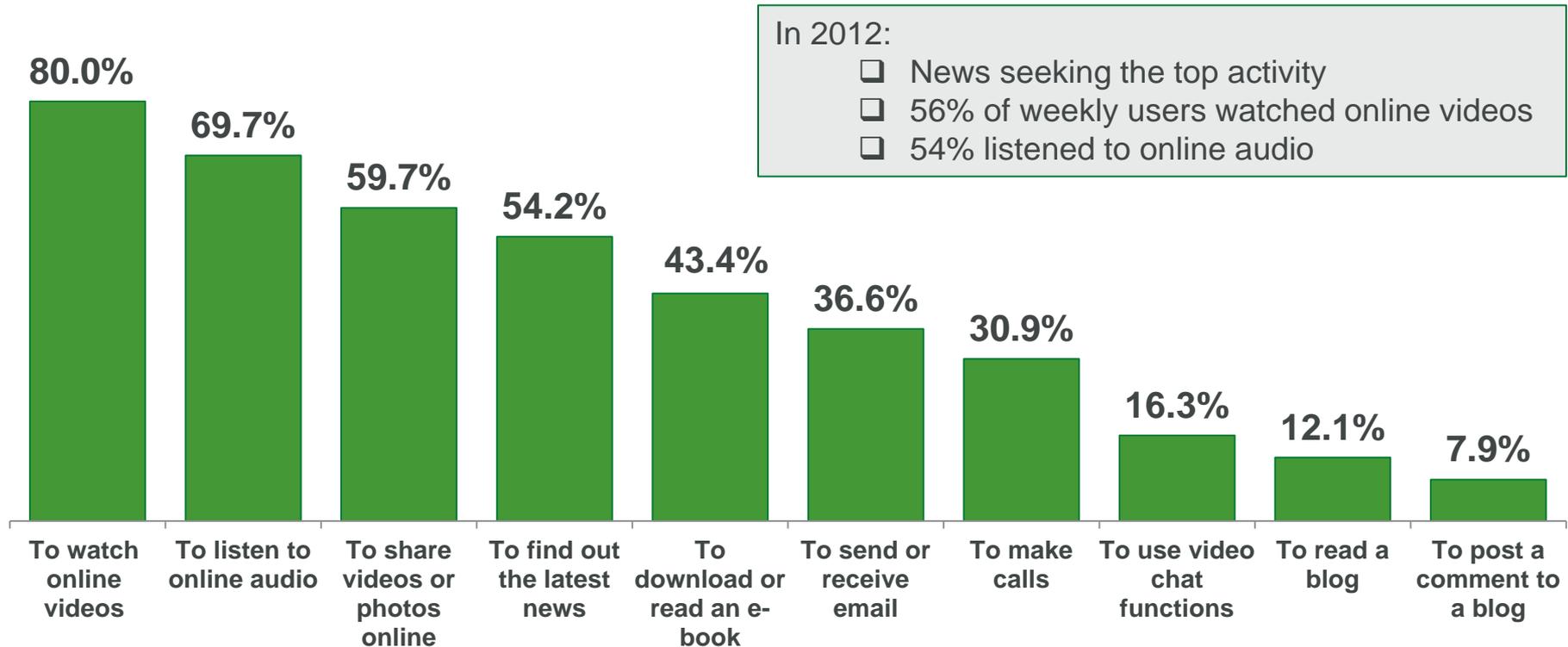
When was the last time you used the Internet, either for work or personal purposes, whether at home or elsewhere? % “Yesterday” or “in the last 7 days”



Still, less urban and educated than in 2012

# Internet Activities in Cambodia: Multimedia Dominates

*In the last seven days, which of the following activities have you used the Internet for? Results among weekly Internet users.*



(n=267)

# Urban and Rural Internet Users do Similar Activities

	Weekly Internet users (n=239)	Urban weekly Internet users (n=118)	Rural weekly Internet users (n=121)
To watch online videos	80.0%	81.4%	79.2%
To listen to online audio	69.7%	72.9%	66.9%
To share videos or photos online	59.7%	64.4%	55.4%
To find out the latest news	54.2%	47.5%	61.2%
To download or read an e-book	43.4%	51.3%	35.5%
To send or receive email	36.6%	40.7%	32.2%
To make calls	30.9%	32.2%	29.8%
To use video chat function	16.3%	20.3%	12.4%
To read a blog	12.1%	13.4%	10.7%
To post a comment to a blog	7.9%	8.4%	7.4%

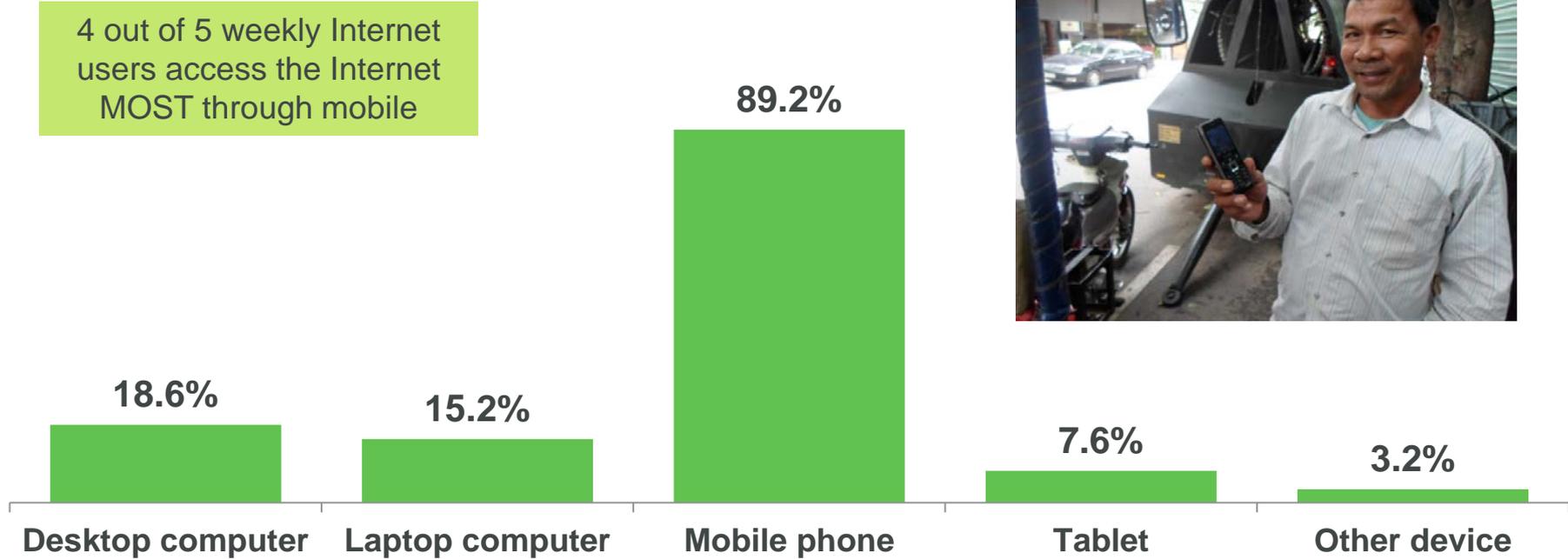
# Facebook the Clear Leader in Cambodia's Social Media



- 9.6% of Cambodian adults report using social media in the last week
- Of those, 98.3% used Facebook
- Facebook is #1 site Web users named spontaneously as their top online news source; YouTube is #2

# Devices Used to Access the Internet in Cambodia

*In the last 7 days, which of the following devices have you used to access the Internet? Among respondents who have used the Internet in the last 7 days. (n=234)*



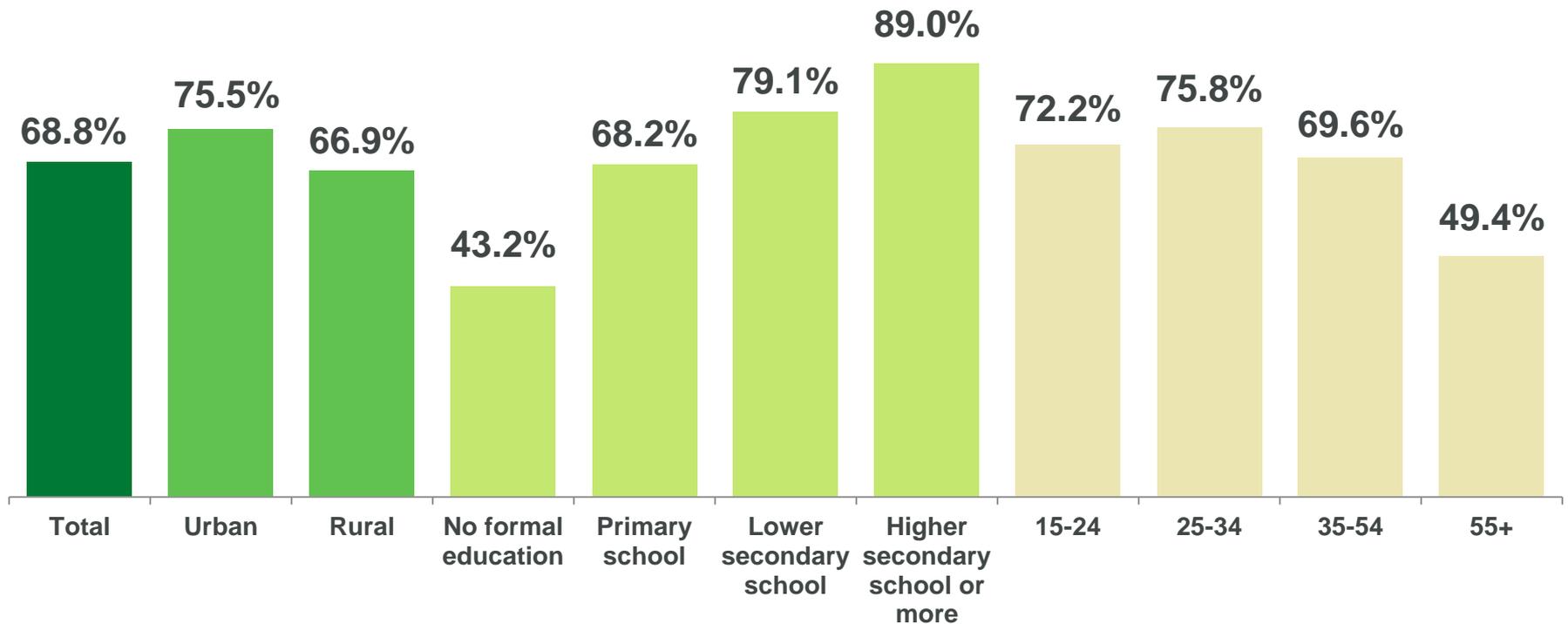
# Cambodia's Mobile Phone Ownership Since 2004



Source: National surveys of Cambodia conducted through the BBG's International Audience Research Program

# Personal Mobile Phone Ownership

*Do you, yourself, have a mobile phone, or not? (% “yes”)*



# Mobile in Cambodia: Facts

- 74% of mobile owners use Roman/English fonts; 42% use Khmer fonts
- At least one in five personal mobile phones can access the Internet or download an app
- Android nearly twice as widely used as Apple phones
- 7.3% of Cambodian adults download or use mobile applications
- Top apps: Facebook, YouTube, game-related apps, Line and Gmail



# Mobile Activities: Still an Urban-Rural Divide on Advanced Functions

	Total (n=2,000)	Urban (n=400)	Rural (n=1,600)	Mobile phone owners (n=1,578)
Made/Received a phone call	72.9%	79.6%	71.1%	92.2%
Played a game	31.3%	42.3%	28.3%	39.8%
Listened to the radio	24.4%	36.3%	21.1%	31.4%
<b>Sent/Received SMS</b>	<b>20.1%</b>	<b>32.1%</b>	<b>16.8%</b>	<b>27.3%</b>
Downloaded and viewed a video clip	10.8%	20.3%	8.2%	14.4%
Accessed the Internet	9.3%	20.8%	6.1%	13.0%
Accessed a social networking site	7.9%	20.0%	4.5%	11.1%
Downloaded/Listened to an audio clip	7.1%	15.5%	4.8%	9.3%
Downloaded or used a mobile app	6.8%	12.7%	5.2%	9.4%
Sent a photo	6.0%	13.6%	3.9%	8.5%
Sent or received an email	4.3%	9.8%	2.8%	6.0%
Sent/Received instant messages	3.5%	8.0%	2.3%	4.8%
Watched live television	2.8%	4.8%	2.3%	3.6%

# Key Takeaways

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- Cambodia is a country on the cusp of rapid media change
- TV and radio remain the top media and main sources of news
  - Apolitical newcomer Hang Meas is top source with tabloid news, entertainment.
- But new media is gaining, fueled by widespread mobile use
  - Almost all households have a mobile phone
  - Young, educated and urban drive new media use
- Internet numbers remain in low double digits, but growth is exponential
  - Outside infrastructure investment increasing broadband mobile rapidly
  - Those who use the Internet use it for broadband activities—video, audio—even in the countryside
- Facebook dominates social media and is the top online news source



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## Upcoming BBG Research Series events:

– Thursday, January 15: TBD

Learn more about the BBG Research series at [bbg.gov/bbgresearch](http://bbg.gov/bbgresearch)

Have a question? Contact us at 202-203-4400 or [publicaffairs@bbg.gov](mailto:publicaffairs@bbg.gov)