

INTERNET IS ON THE RISE

Media consumption habits of
young Cambodians

Research and Learning
Dec 2016

METHODOLOGY

Nationally representative quantitative survey

2016

1,565 young Cambodians who are 15-24 years old.

2013

2,597 young Cambodians who are 15-24 years old.

Phnom Penh

Kampong Cham

Qualitative study

Two locations of Cambodia
Urban and Rural.

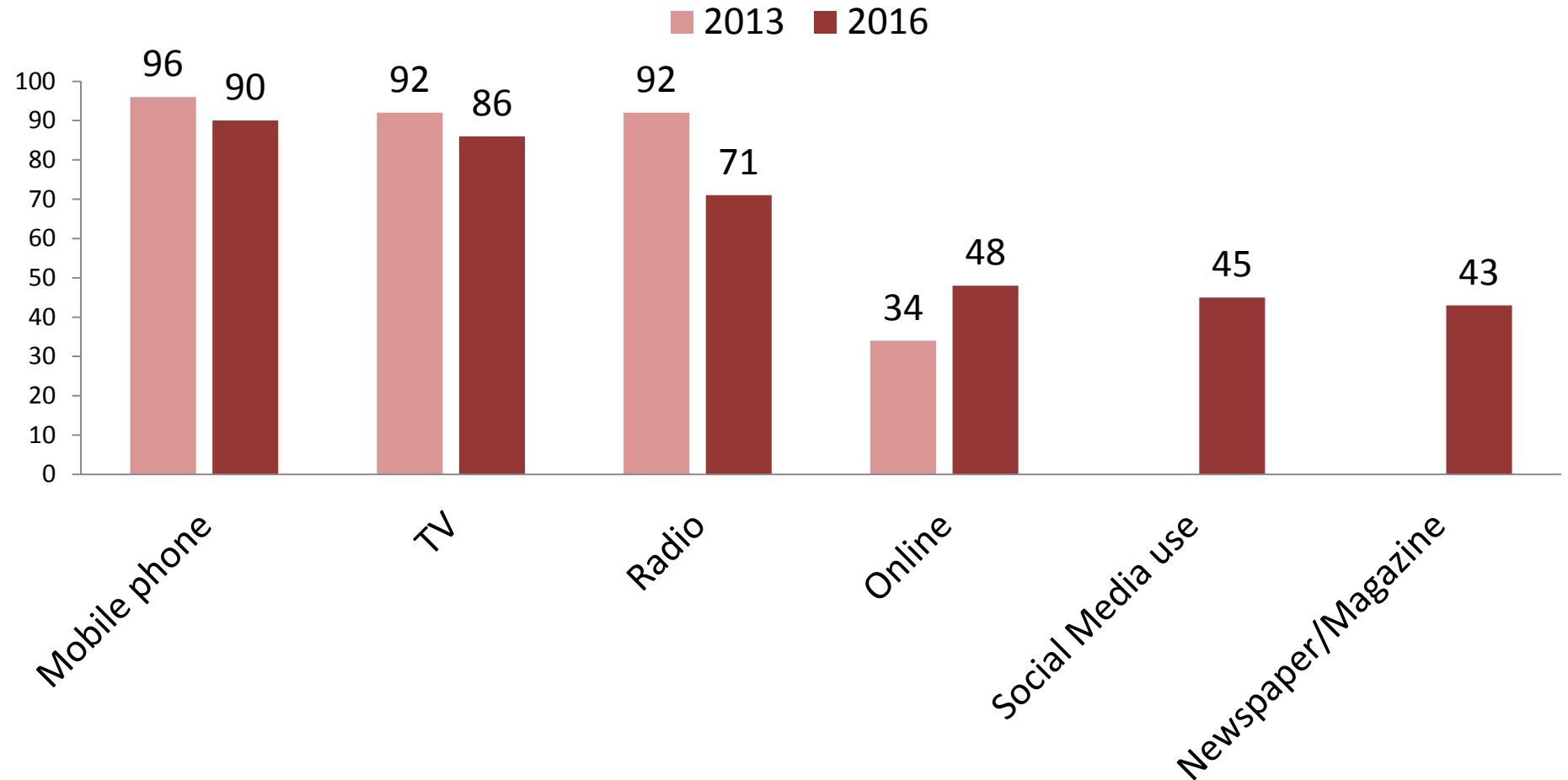
14 Focus groups discussions

Young Cambodian age 15-30
years old

Data collection in October
2016.

Traditional media is declining - radio faced the largest drop in the past three years. But internet access has increased a lot among Cambodian youth.

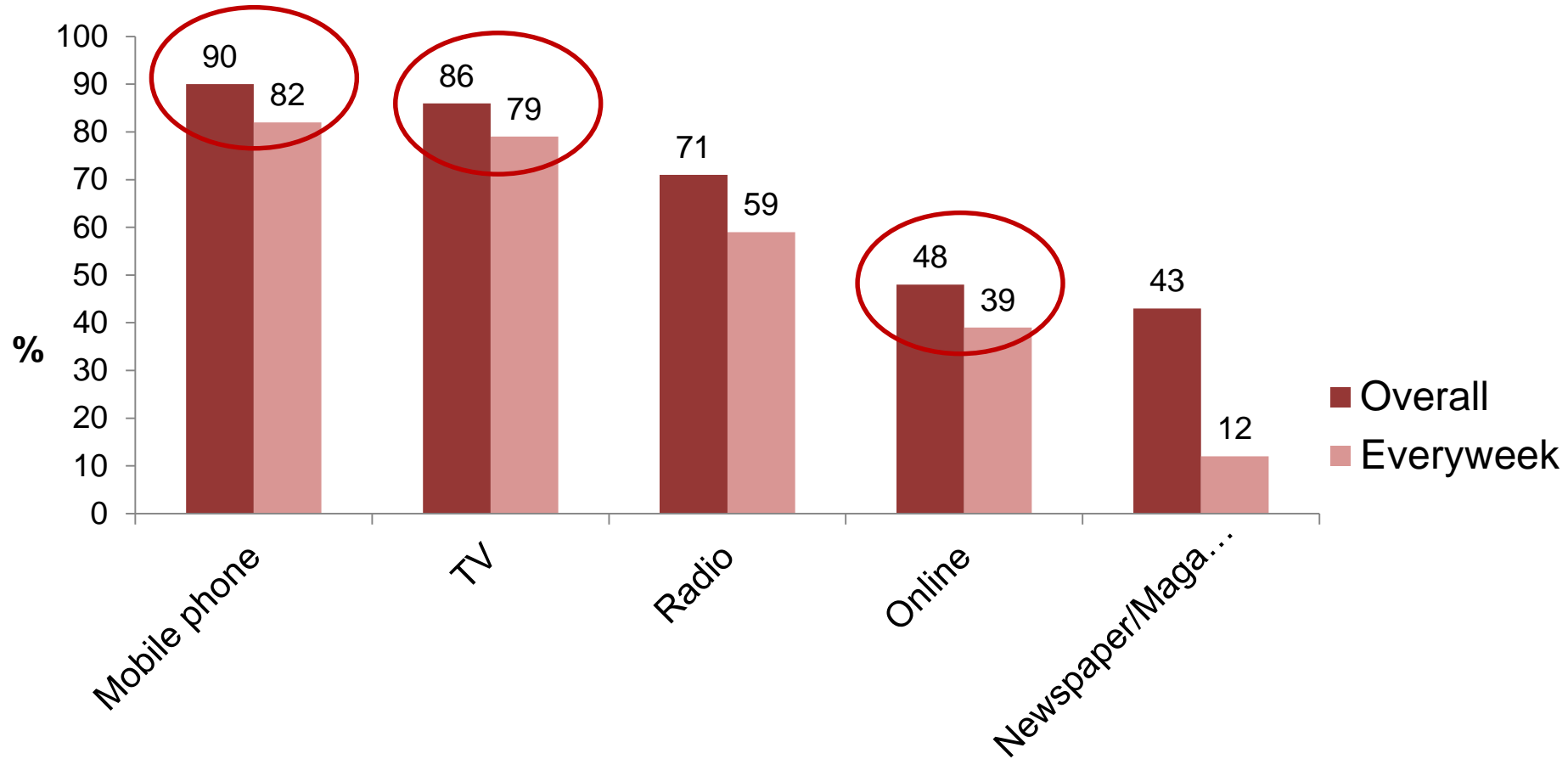
Figure 1: Access to different media platforms in the last three years



All media access platforms is defined as ever having access in their household or in any other place.
Base: 2013 (n=2,597) and 2016 (n=1,565).

Young people access mobile phone, internet and TV frequently

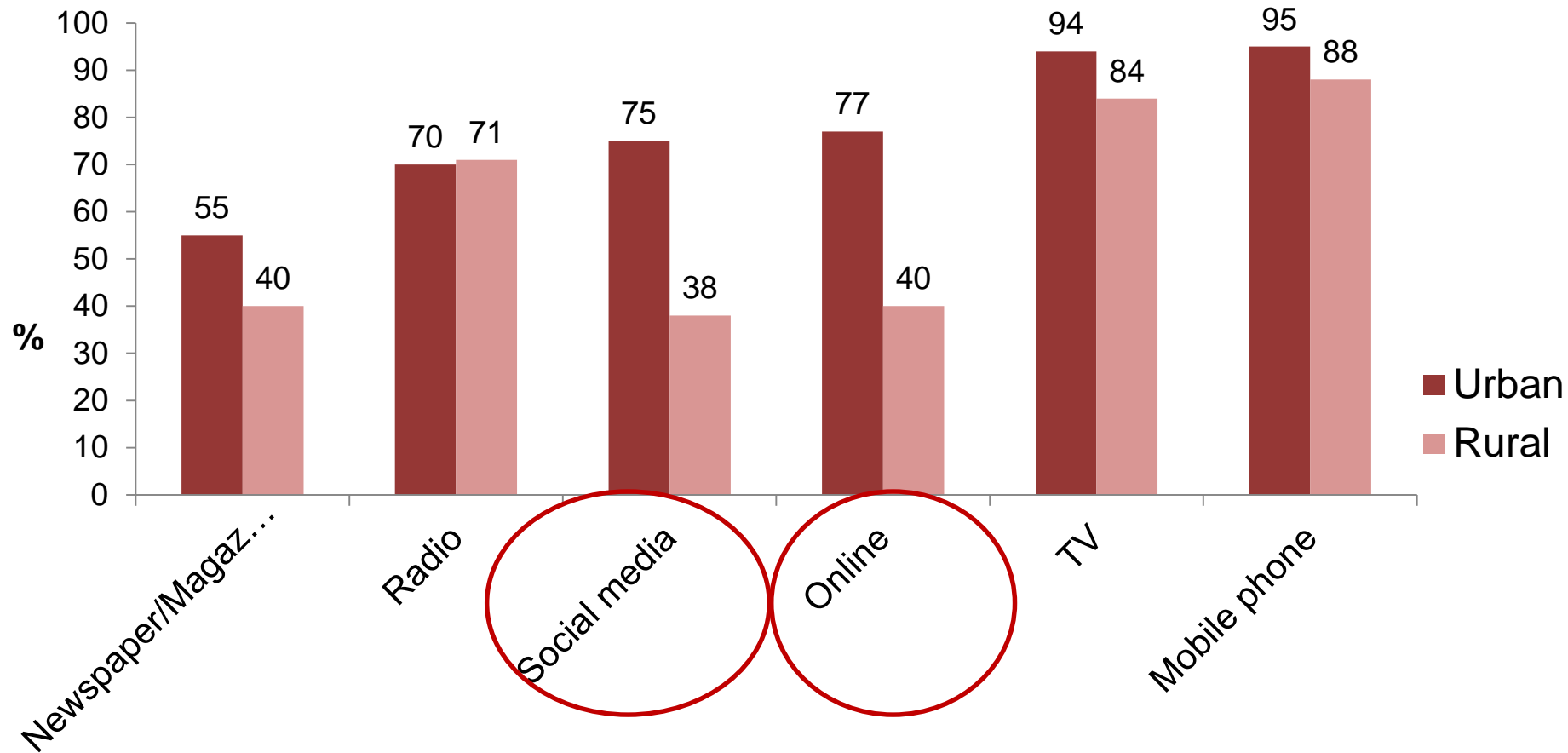
Figure 2: Overall and every week of media access among youth in Cambodia in 2016



Base: Respondents in 2016 (n=1,565). Overall access is defined as ever having access in their household or in any other place.

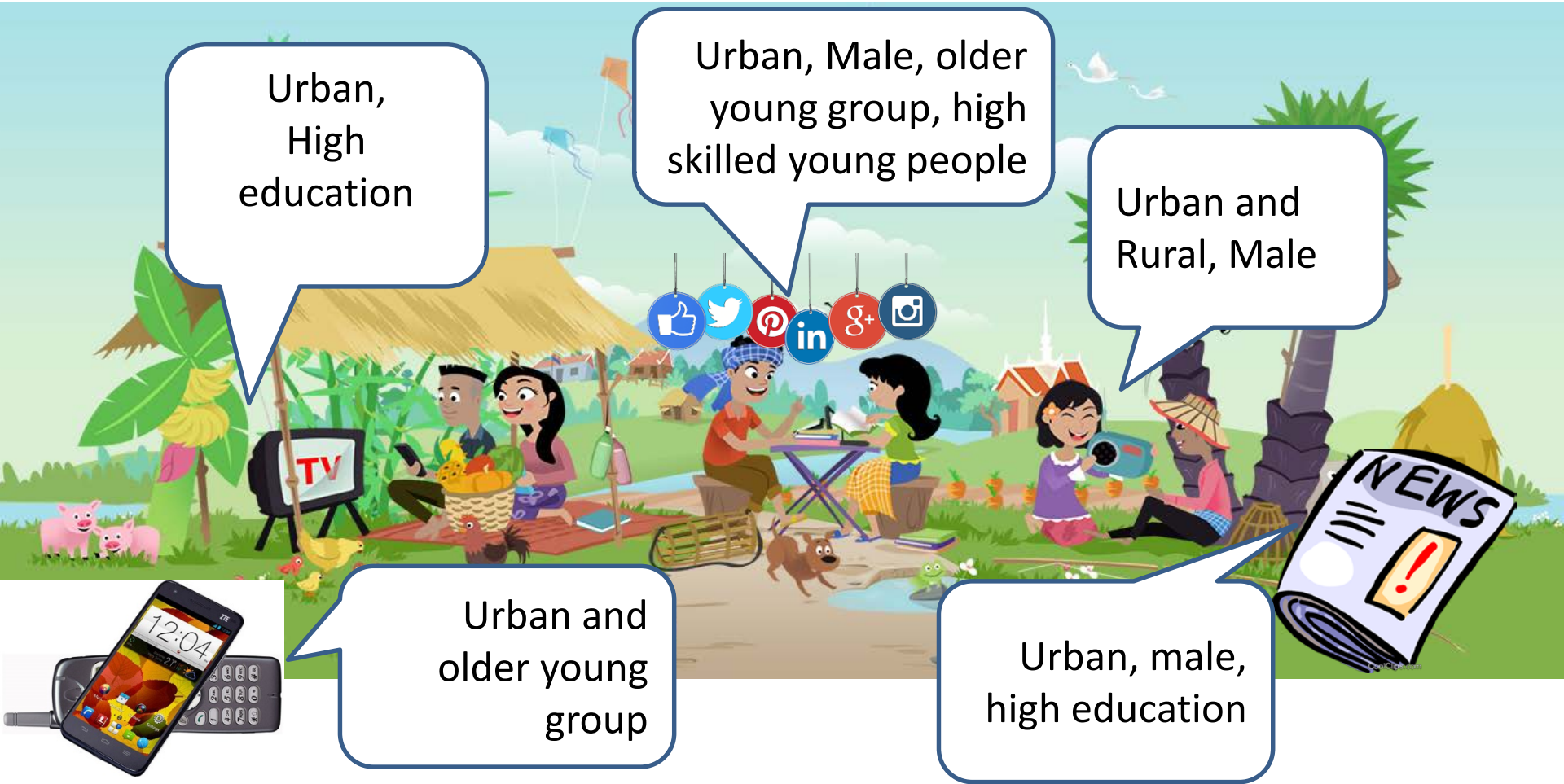
Urban youth have more access to internet than rural youth

Figure 3: Media access pattern in urban and rural among youth in Cambodia in 2016



Base: Respondents in 2016 (n=1,565). Media access is defined as ever having access in their household or in any other place.

How different young people access to different media?



Urban,
High
education

Urban, Male, older
young group, high
skilled young people

Urban and
Rural, Male

Urban and
older young
group

Urban, male,
high education

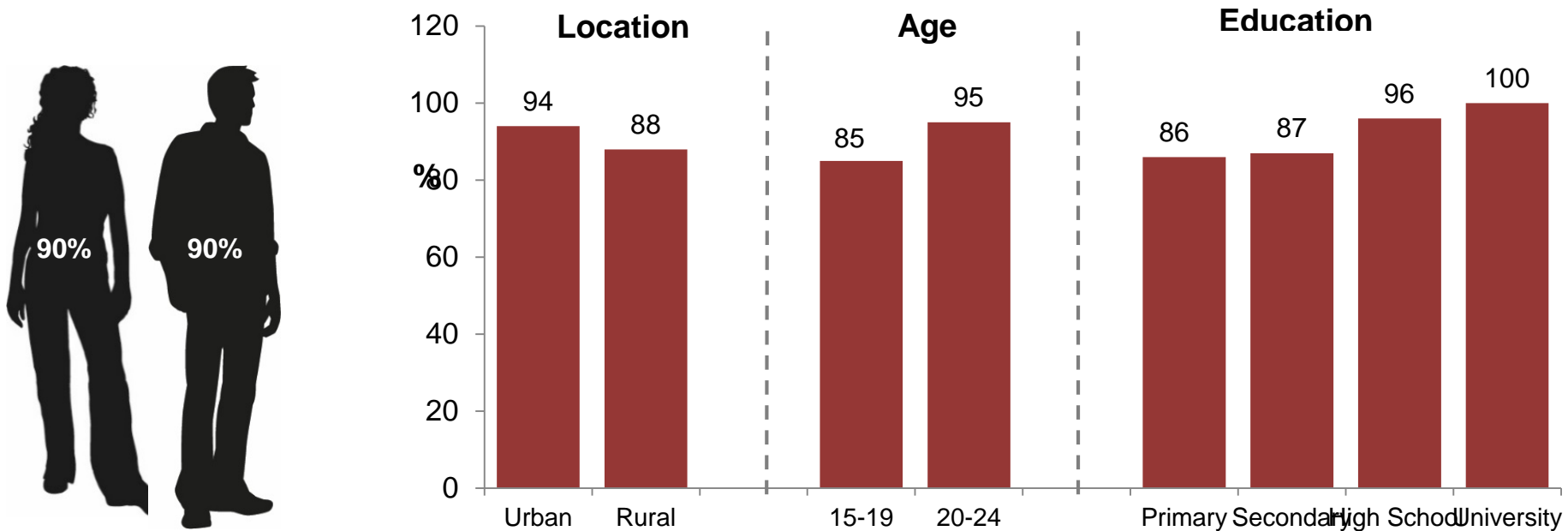


SNAPSHOT: MOBILE PHONE

- Mobile phone access is near universal amongst young Cambodians.
- Young people with access to smartphones are more likely to be male, living in urban areas, those from households with higher incomes and higher education levels.
- Metfone used to be the most used sim card company in 2013, but in 2016 Smart nearly had equal levels of use of their sim cards.

Urban, high educated, and older young people have more access to mobile phone

Figure 4: Overall access to mobile phone by key demographics in 2016



Base: Respondents in 2016 (n=1,565); Usage of mobile phone is defined as ever having access in their household or in any other place.

Those from higher income households are more likely to have access to mobile phone.

Figure 5: Main occupation of mobile phone users in 2016

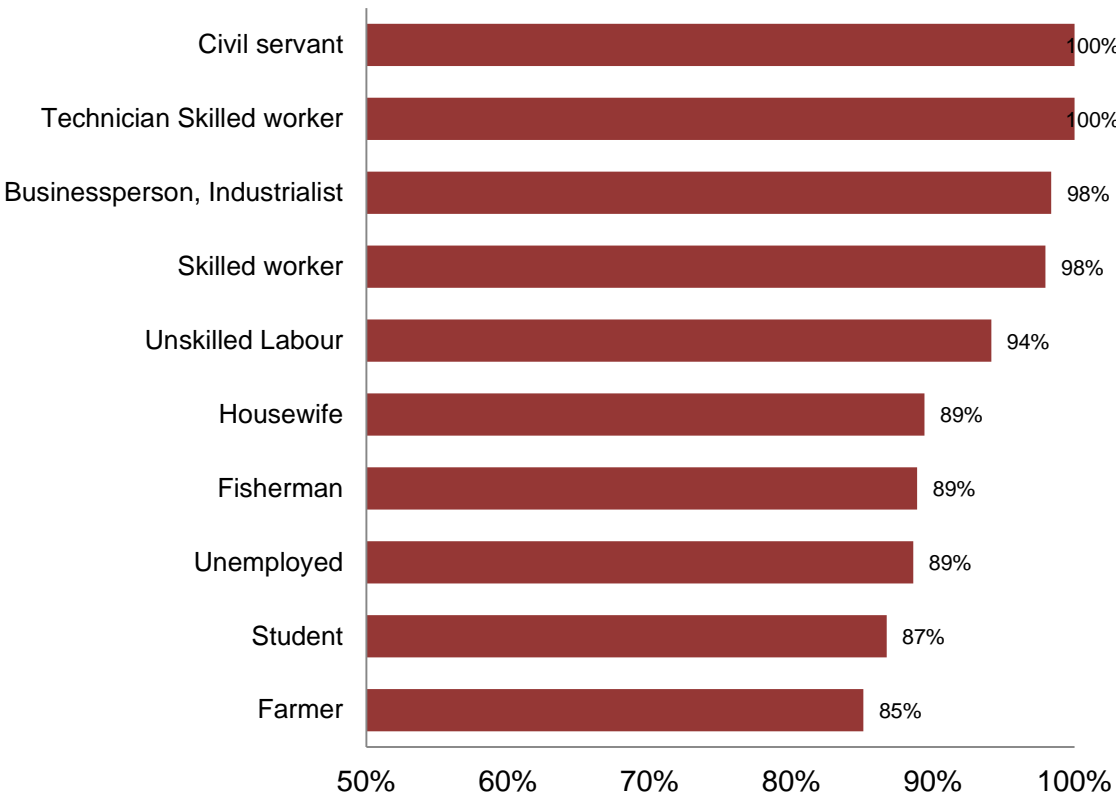
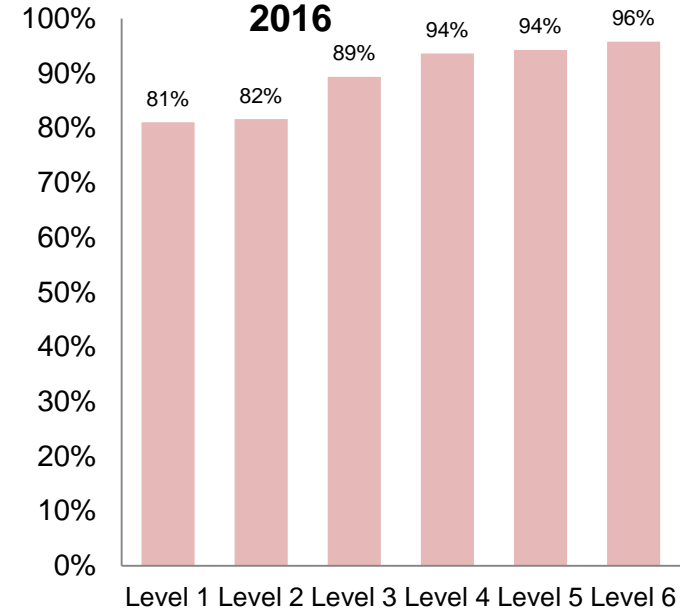


Figure 6: Household economic status of mobile phone users in 2016



Base:

Level 1 (n=95) : We don't have enough money, even for food

Level 2(n=218): We can afford food but purchasing of clothes is a serious problem

Level 3 (n=630): We can afford food and clothes, but purchasing of durables such as TV set or a refrigerator is difficult for us

Level 4 (n=409): We can afford main household appliances, but purchasing a car is beyond our means

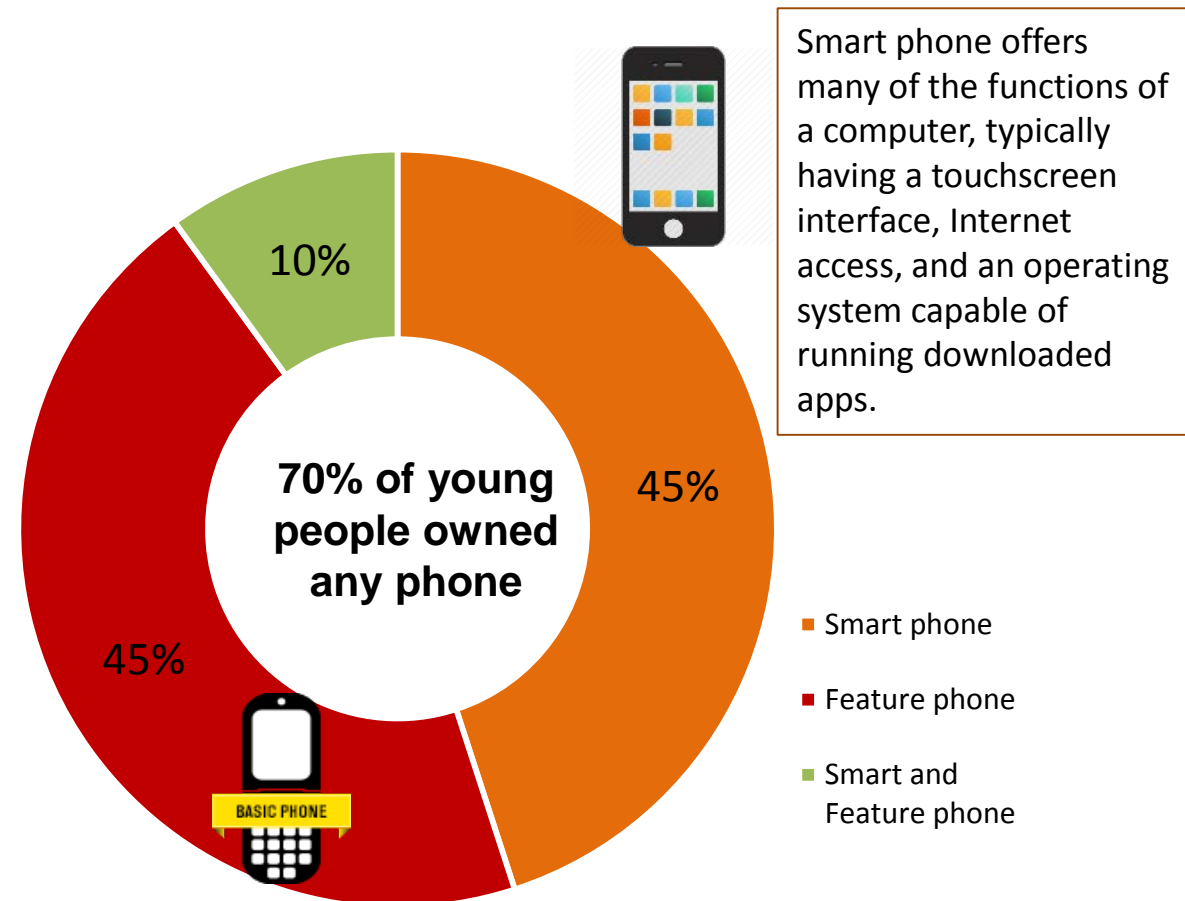
Level 5 (n=140): What we earn is sufficient to buy anything except such expensive purchases as an apartment or house

Level 6 (n=71): We do not face financial problems. If necessary we can buy an apartment or a house

Usage of mobile phone is defined as ever having access in their household or in any other place.

Base: All respondents in 2016 (n= 1,565).

The types of phones young Cambodians have access to are either a smart phone or a feature phone – with near equal levels of access.



- Similar to 2013 most young people accessed to mobile phone through personal phone (68% in 2013, 70% in 2016).
- Access is equal among both male and female.

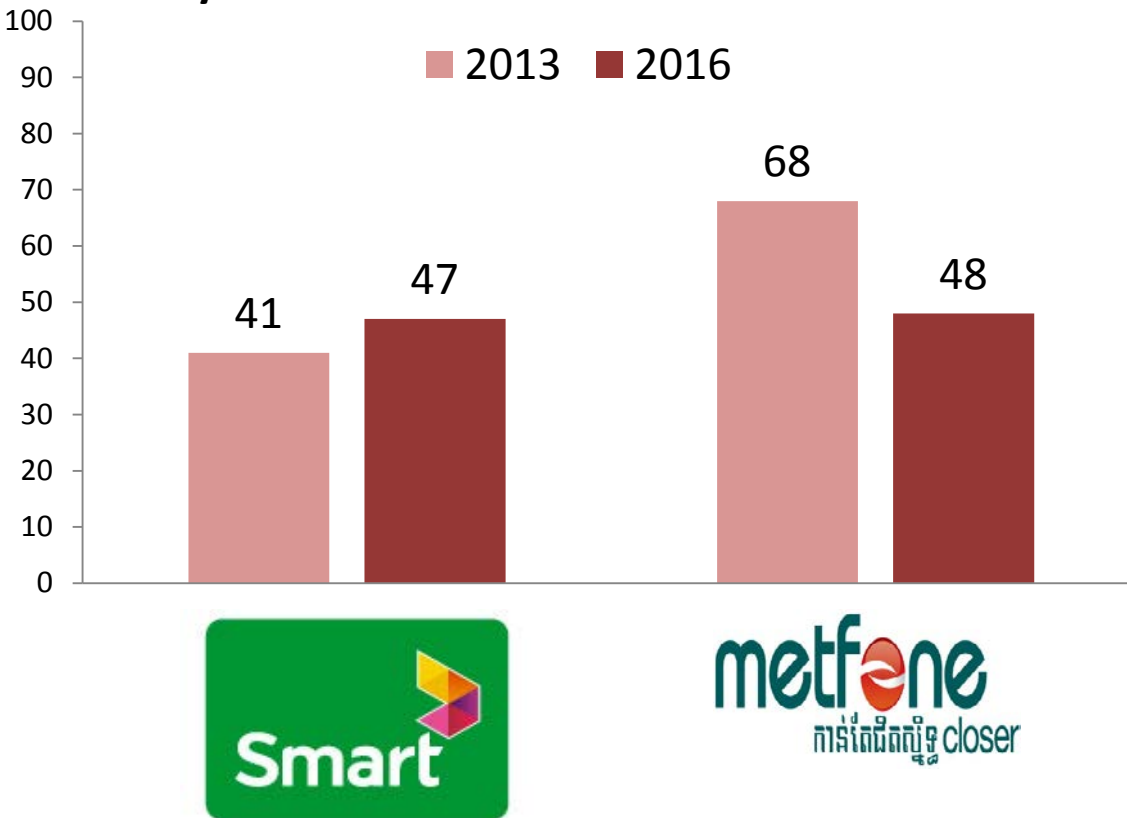
Males, those from urban areas, those with high education, those with higher household income were more likely to access a smart phone



Smart phone in Cambodia is cheap (a Chinese version is around 50-60 USD). Those who are male, living in urban areas, young people in university, have more access to smart phone.

Metfone sim card company was the main provider in 2013, but in 2016 Smart is catching up.

Figure 7: Sim card company patterns among youth in Cambodia from 2013 to 2016



- Smart has done lots of promotions and has good signal coverage across the country which may account for this increase.

Base: Respondents in 2013 (n=2,597).
Respondents in 2016 (n=1,565).

SNAPSHOT: INTERNET

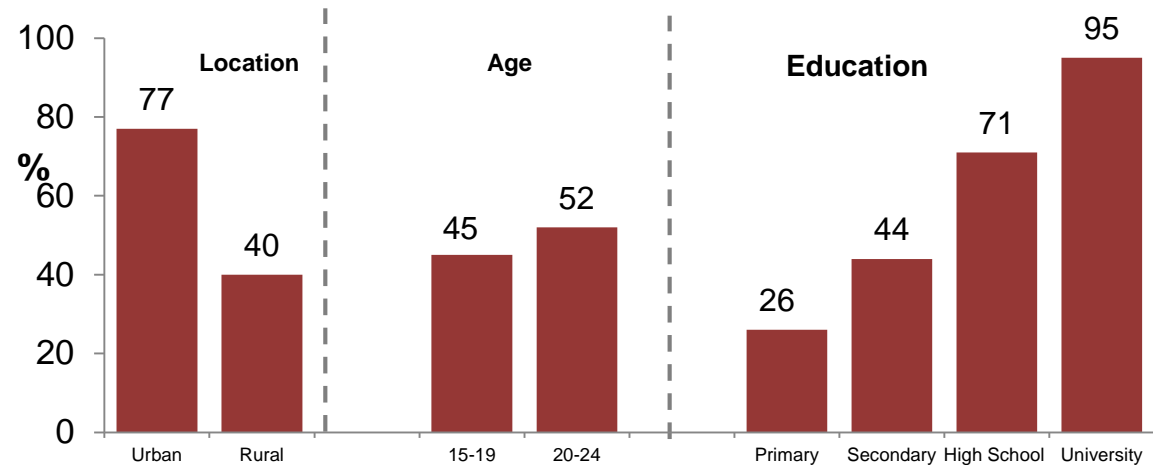


- Internet is most accessed amongst those in urban areas and males.
- Young people in low skill jobs have least access to internet.
- Young people are in households with higher incomes have more access to internet.
- The vast majority of internet users access social media and Facebook.

Access to internet increased from 2013 but urban and male young people are still the dominant group users



Figure 8: Overall access to Internet by key demographics in 2016



Base: Respondents in 2016 (n=1,565); Female(n=786), Male(n=779), Urban(n=309), Rural(n=1,256), 15-19 years old(n=890), 20-24 years old (n=675), primary(n=433), secondary (n=638), high school(n=379), university(n=80).

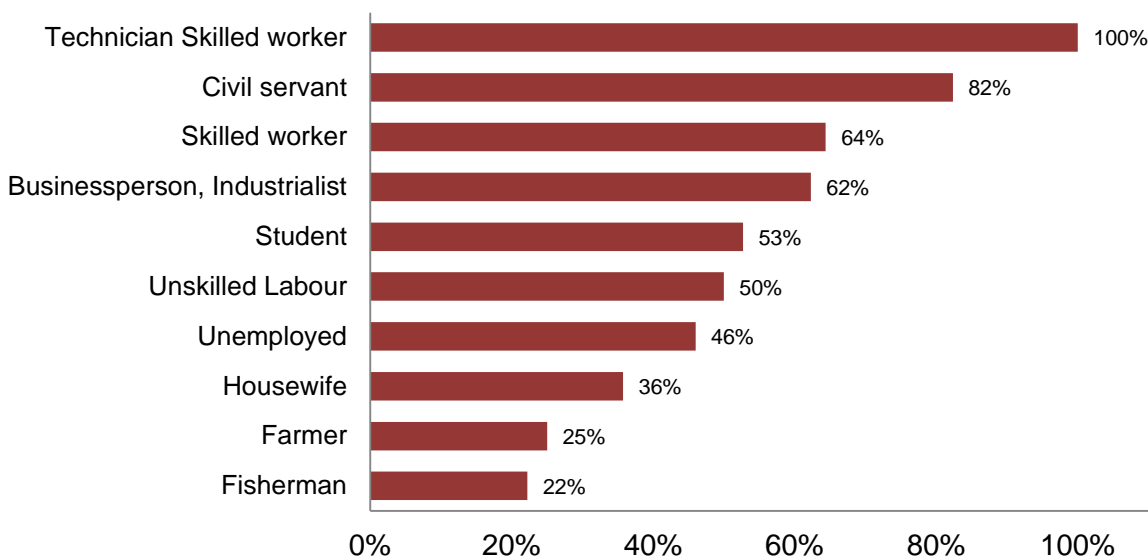
Young people used smart phone to access to internet. Only student groups have access to variety devices like computer and iPad (qualitative).

Young people in university have high access to internet. Qualitative research revealed it was really important to them in daily life (school or work activities) and they have knowledge in using internet better than other groups.

Young people in households with higher income are more likely to have access to internet

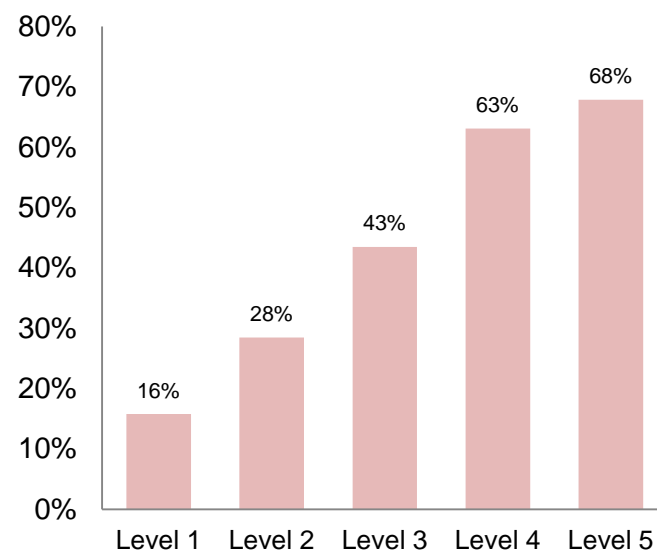
Farmers and fisherman and those from lower income households have least access to internet. Though the internet cost is better if compared to 2013, it still poses a concern around cost for unskilled workers-farmer/construction worker (qualitative).

Figure 9: Internet user profile in 2016



Base: All respondents in 2016 (n=1,555).

Figure 10: Household economic status of internet users in 2016



Base:

Level 1 (n=95) : We don't have enough money, even for food

Level 2(n=218): We can afford food but purchasing of clothes is a serious problem

Level 3 (n=630): We can afford food and clothes, but purchasing of durables such as TV set or a refrigerator is difficult for us

Level 4 (n=409): We can afford main household appliances, but purchasing a car is beyond our means

Level 5 (n=140): What we earn is sufficient to buy anything except such expensive purchases as an apartment or house

Level 6 (n=71): We do not face financial problems. If necessary we can buy an apartment or a house

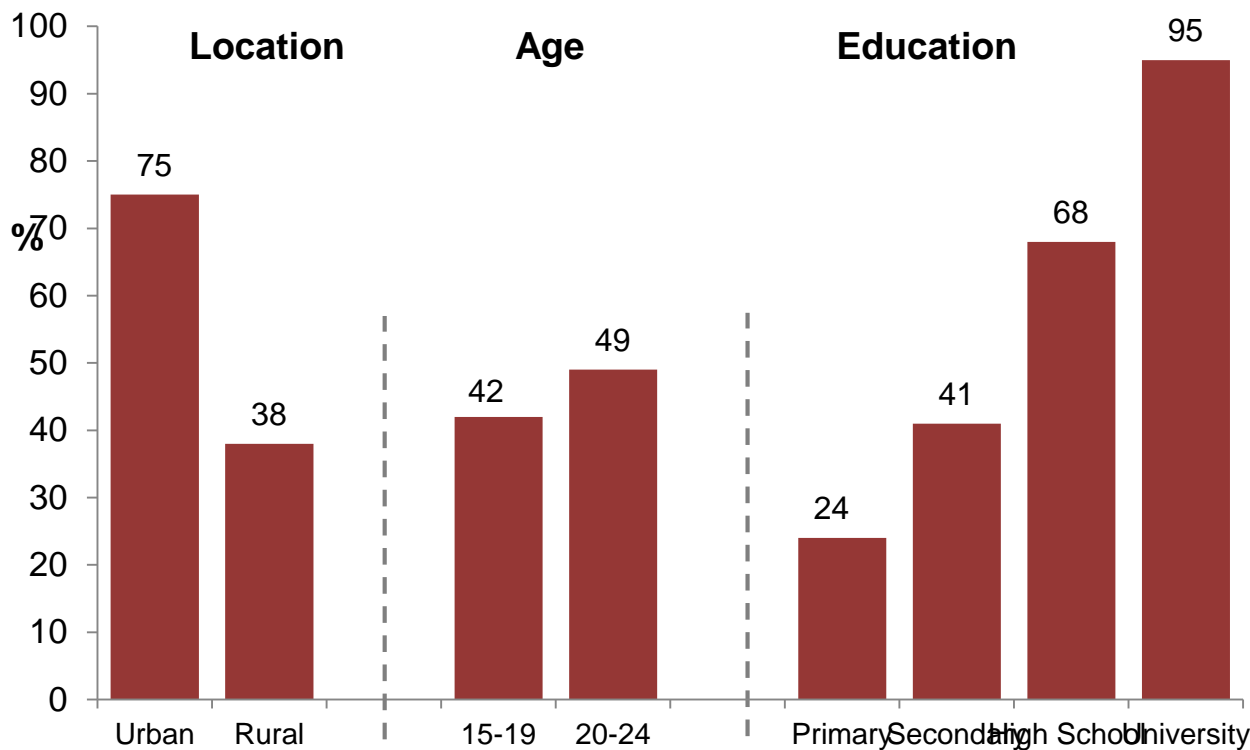
Almost all young people who have access to internet use social media



95%
Of internet users, use social media



Figure 11: Overall access to social media by key demographics in 2016

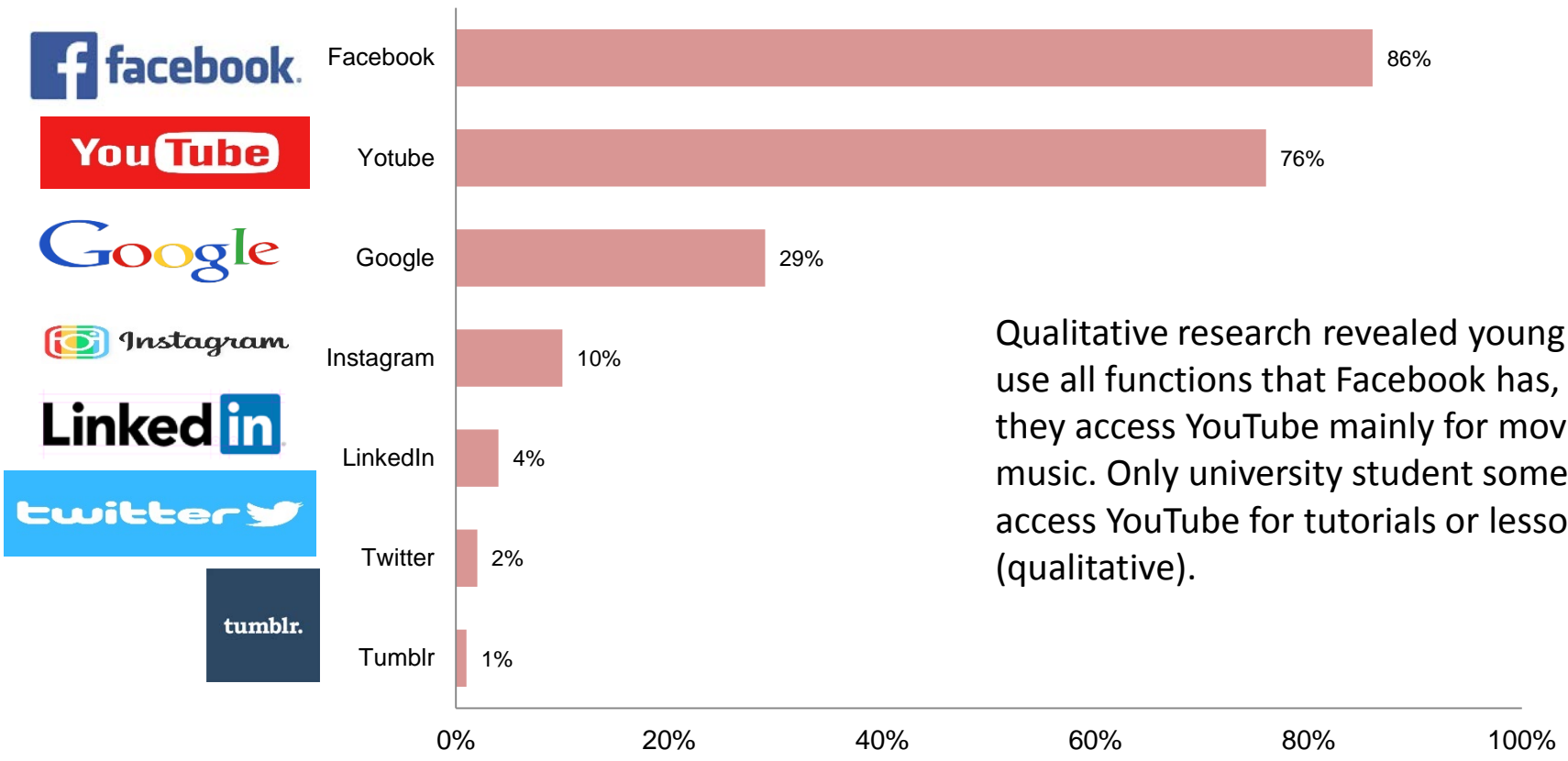


Access to internet is defined as ever having access in their household or in any other place.

Base: Respondents in 2016 (n=1,555)

Facebook is the most popular site, followed by YouTube

Figure 12: Favorite social media of young people in 2016



Qualitative research revealed young people use all functions that Facebook has, while they access YouTube mainly for movie and music. Only university student sometimes access YouTube for tutorials or lessons (qualitative).

Base: All internet users (n= 746).

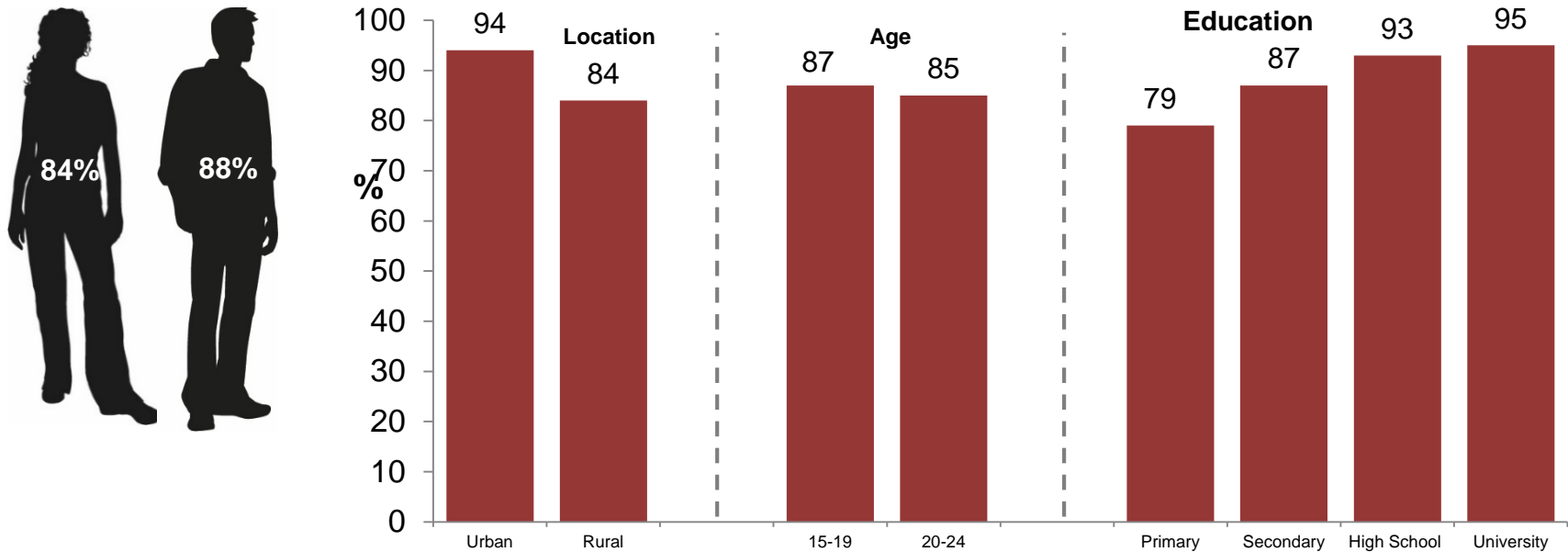
SNAPSHOT: TELEVISION



- The majority of young Cambodians are consuming TV.
- Nearly half of young Cambodians access TV everyday. Amongst those who did not access TV everyday, they watched it more on Saturday and Monday.
- Farmers is the occupational group who have least access to TV, mainly due to limited affordability of own TV set and signal problems. Many of them still watch TV content however by renting DVDs.

Most young people have access to TV, but access is higher in urban and amongst those in higher education groups

Figure 13: Overall access to TV by key demographics in 2016

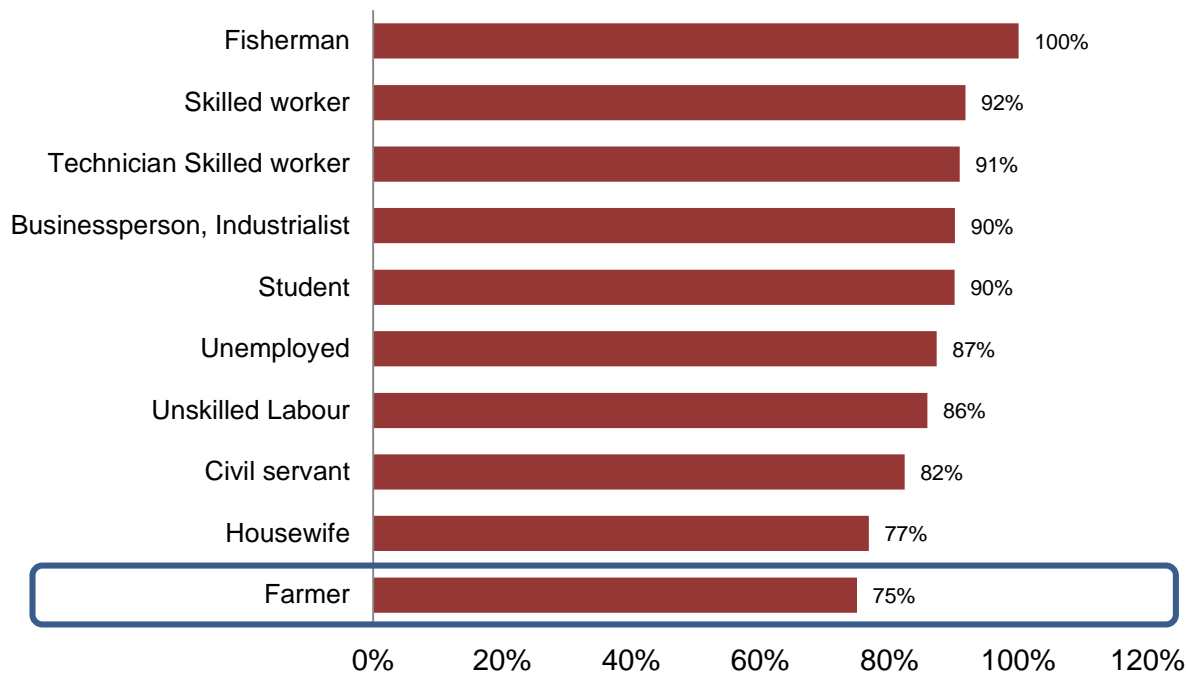


TV access is defined as ever having access in their household or in any other place.

Base: Respondents in 2016 (n=1,565); Female(n=786), Male(n=779), Urban(n=309), Rural(n=1,256), 15-19 years old(n=890), 20-24 years old (n=675), primary(n=433), secondary (n=638), high school(n=379), university(n=80).

Farmers have less access to TV if compared to other occupational groups

Figure 14: TV viewer profile in 2016



Base: All respondents in 2016 (n= 1,565).

Qualitative research revealed farmers have less access to TV but they frequently use DVD player to watch drama or movies like Thai, Korea, or Chinese films. They watched it regularly (almost everyday) for about 4-5 hours per day. They rent the discs from district town which cost about 1000riels (\$0.25) per movies (1.5 hours). They watched it together as a family and sometime with their neighbors.

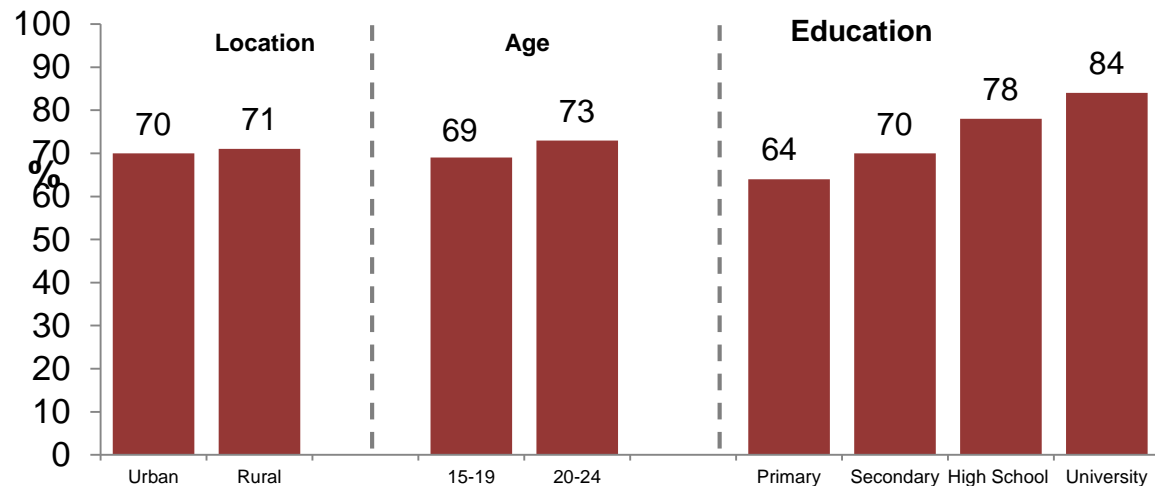
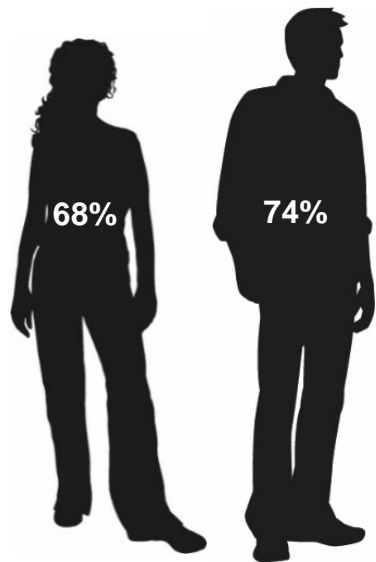


SNAPSHOT: RADIO

- Radio listenership has been dropped down from 2013 to 2016 from 92% to 71% and it is the same trend cross all locations and demographics of young people.
- In 2016, radio listenership almost equal penetration amongst those in urban and rural locations and different age groups.
- Young people listen to radio using both mobile phone and radio sets at an equal rate.

Though declining, radio reaches urban and rural people almost equally and those of different age groups.

Figure 15: Overall access to Internet by key demographics in 2016



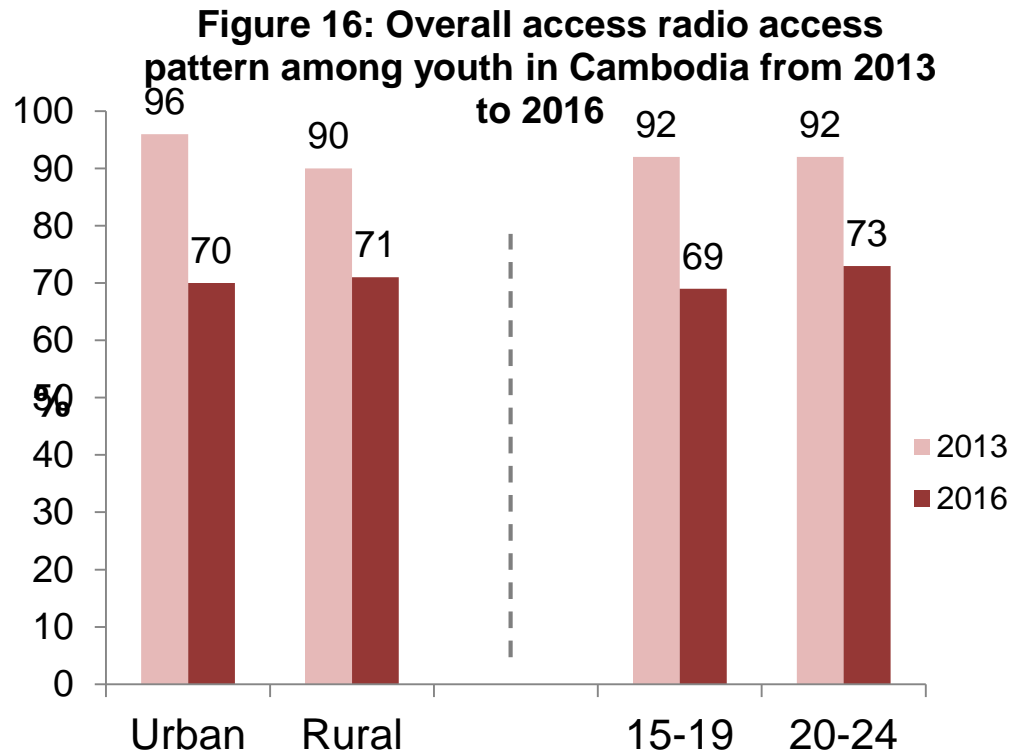
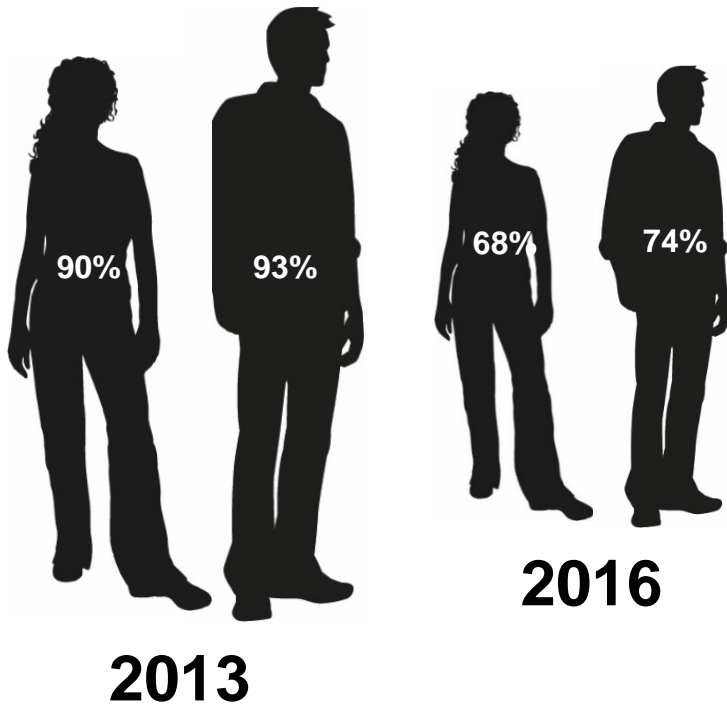
Base: Respondents in 2016 (n=1,565)

Radio is defined as ever having access in their household or in any other place.

In other Asian countries, radio is found to be accessed more amongst rural areas which was not the case in Cambodia. It is likely young Cambodian either in urban or rural are having similar preference about programme on radio. There are two mainly programmes (qualitative):

1. Receiving update on hot news (domestic news like accident, fire,..etc)
2. The family/love consultation (Kru Monou), the programme can be found from FM ABC, 102, VOA, RFA

Radio access has dropped among all key demographics in 2016

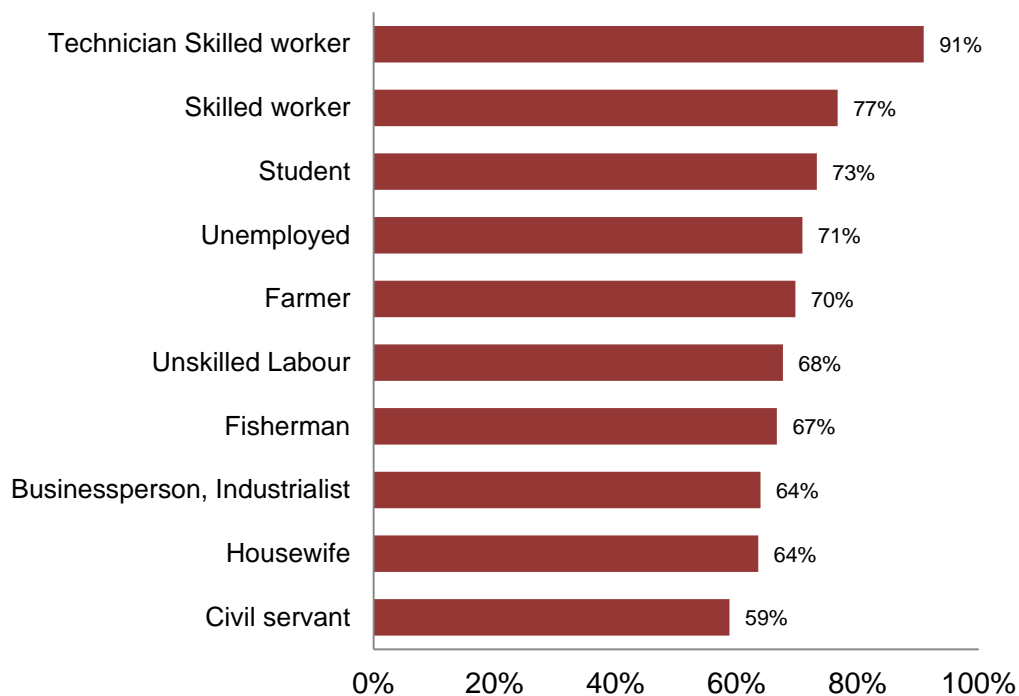


Base: Respondents in 2016 (n=1,565); Female(n=786), Male(n=779), Urban(n=309), Rural(n=1,256), 15-19 years old(n=890), 20-24 years old (n=675).

Base: Respondents in 2013 (n=2,597); Female(n=1,302), Male(n=1,295), Urban(n=520), Rural(n=2,077), 15-19 years old(n=1,449), 20-24 years old (n=1,148).

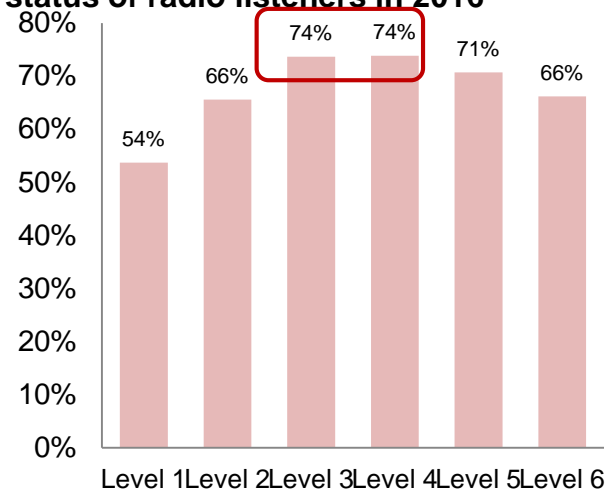
Middle-income household young people are more likely to have access to radio

Figure 17: Radio listeners profile in 2016



Base: All respondents in 2016 (n= 1,565).

Figure 18: Household economic status of radio listeners in 2016



Base:

Level 1 (n=95) : We don't have enough money, even for food

Level 2(n=218): We can afford food but purchasing of clothes is a serious problem

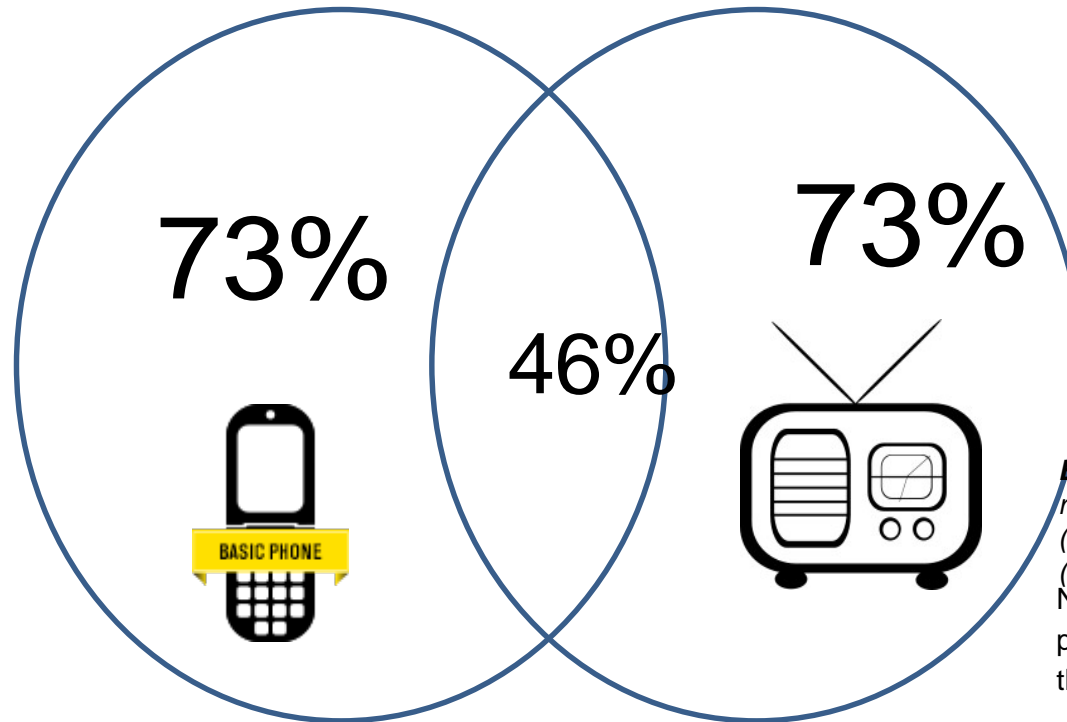
Level 3 (n=630): We can afford food and clothes, but purchasing of durables such as TV set or a refrigerator is difficult for us

Level 4 (n=409): We can afford main household appliances, but purchasing a car is beyond our means

Level 5 (n=140): What we earn is sufficient to buy anything except such expensive purchases as an apartment or house

Level 6 (n=71): We do not face financial problems. If necessary we can buy an apartment or a house

High proportion of radio listeners accessed to radio using both mobile phone and radio set



Base: Respondents listened to radio (n=1,107). Radio set (n=811), mobile phone radio (n=809)
NB. Circle size is not exactly proportionate to the size of the audience segment

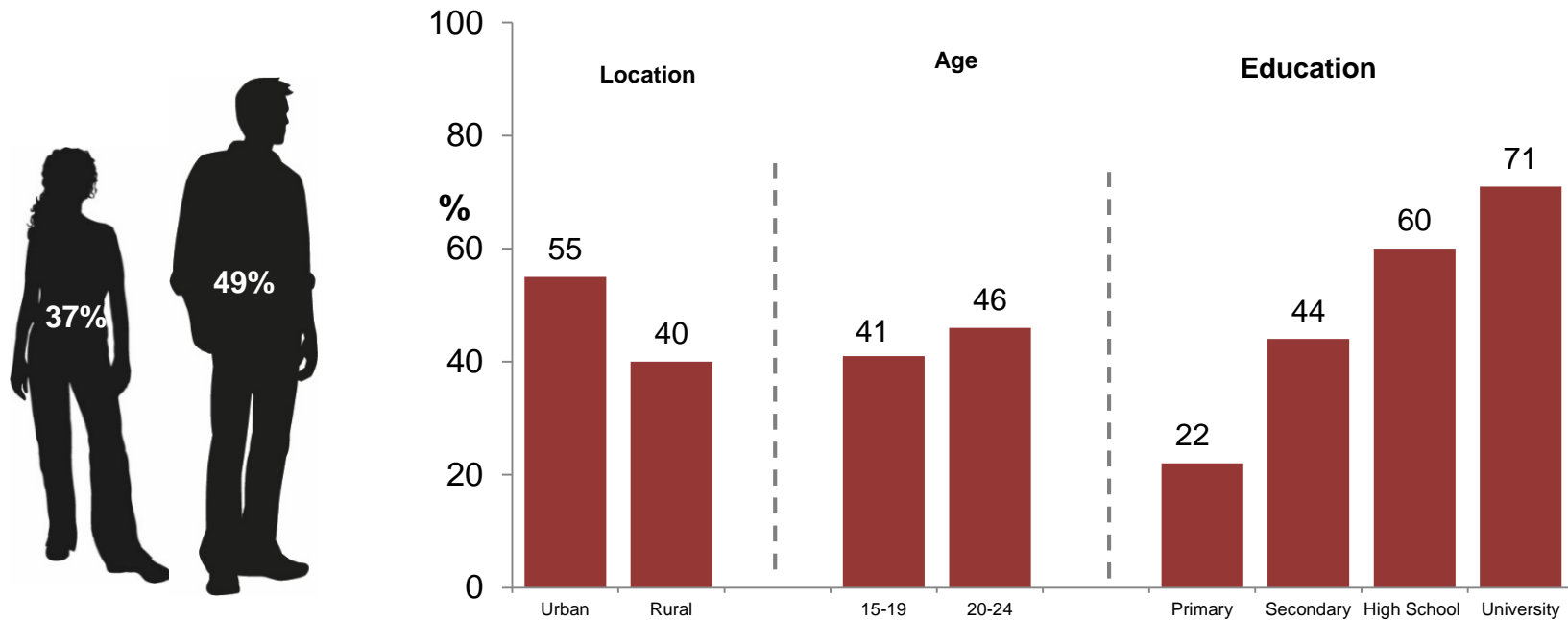
Mobile phone has been used more by male young people (56% vs. 47%) and youth in better household income and education.

Radio set has been used more male (56% vs. 48%) and rural (53% vs 46%) young people.

Newspaper/magazines are accessed by more male, urban and high educational groups of young people



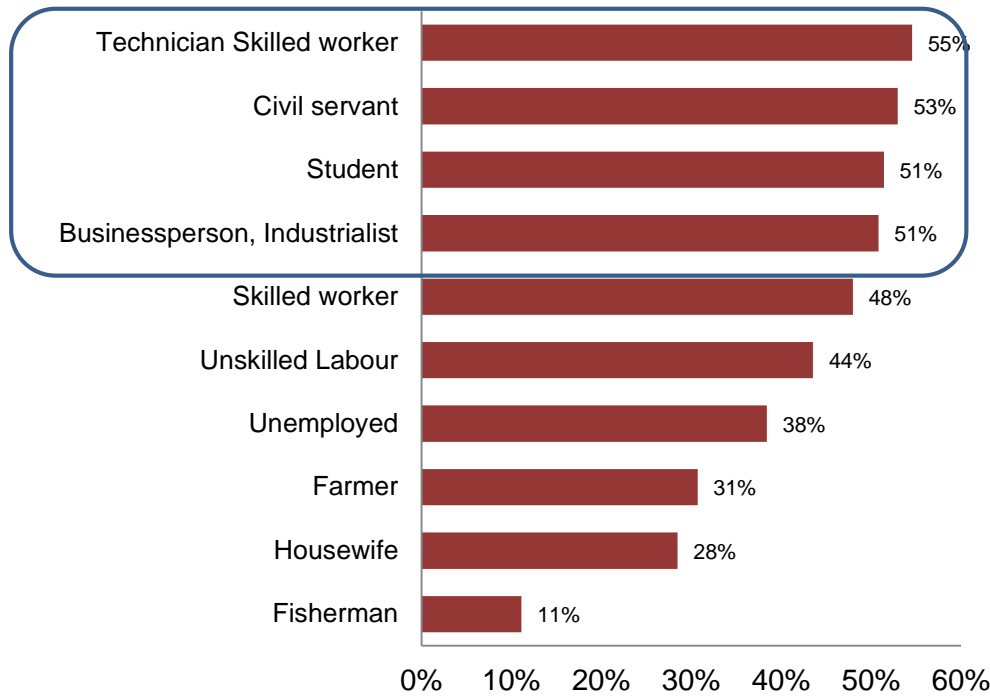
Figure 19: Overall access to Internet by key demographics in 2016



Base: Respondents in 2016 (n=1,565); Female(n=786), Male(n=779), Urban(n=309), Rural(n=1,256), 15-19 years old(n=890), 20-24 years old (n=675), primary(n=433), secondary (n=638), high school(n=379), university(n=80).

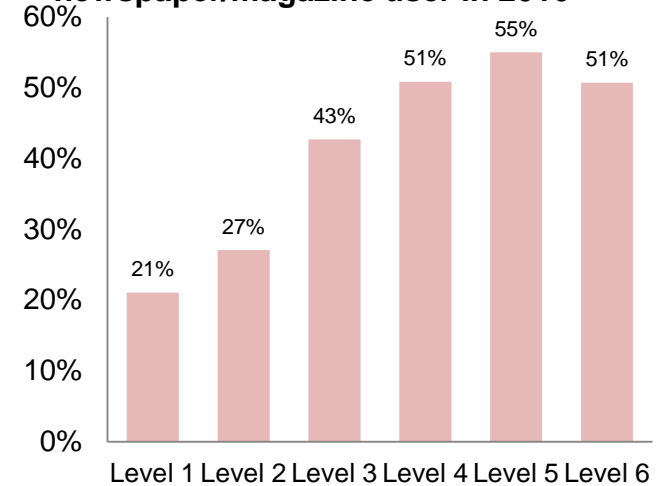
The better income household, high skilled, and students have more access to newspapers/magazines

Figure 20: newspaper/magazine users profile in 2016



Base: All respondents in 2016 (n= 1,565).

Figure 21: Household economic status of newspaper/magazine user in 2016



Base:

Level 1 (n=95) : We don't have enough money, even for food
Level 2(n=218): We can afford food but purchasing of clothes is a serious problem
Level 3 (n=630): We can afford food and clothes, but purchasing of durables such as TV set or a refrigerator is difficult for us
Level 4 (n=409): We can afford main household appliances, but purchasing a car is beyond our means
Level 5 (n=140): What we earn is sufficient to buy anything except such expensive purchases as an apartment or house
Level 6 (n=71): We do not face financial problems. If necessary we can buy an apartment or a house

CONCLUSIONS

- Internet has grown substantially in the last three years if compared to other media platforms in Cambodia among young people. Facebook and YouTube are still the most popular sites young people access to the most and they used smart phone a lot to access internet.
- The levels of mobile phone and TV access have remained similar in the last three years. The majority of young people access both regularly.
- Radio is the only media that dramatically dropped in the last three years among young people. Young people reported that with better access to internet and their ability to access information meant radio was less relied upon.
- Farmers and younger Cambodians are some of the groups with more limited access to media whereas groups such as students had a lot of access to different platforms – especially social media.
- Nationally, young people owned smart and feature phone equally and Metfone and Smart are the lead sim card companies that young people used the most.