Cambodia at a Glance

Findings from the World Poll
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?

- Average rating, life today
- Average rating, life in five years

![Bar chart showing life ratings for different Southeast Asian countries.](chart)

- Cambodia’s life ratings are lowest among SE Asian countries.
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?

Cambodians’ Ratings of Their Current and Future Lives

Average rating, life today

Average rating, life in five years
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”)

- 2007: 33.7%
- 2008: 53.0%
- 2009: 44.2%
- 2010: 50.9%
- 2011: 52.7%
- 2012: 55.0%
- 2013: 63.6%
- 2014: 64.6%
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)

- Buy food that you or your family needed
- Provide adequate shelter for you or your family

2007 2008 2009 2010 2011 2012 2013 2014

- 62.9%
- 57.6%
- 53.5%
- 54.5%
- 49.6%
- 49.3%
- 55.8%
- 67.1%
- 74.5%
- 70.5%

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Most Cambodians Believe Corruption is Widespread in Businesses and Government

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

Corruption in business

Corruption in government

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Broadcasting Board of Governors
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”)

Feelings of Personal Safety Have Fallen Sharply Since 2011
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)

- 2010: 87.9%
- 2011: 89.5%
- 2012: 90.5%
- 2013: 82.9%
- 2014: 75.9%
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?

- **Mobile phone**: 93.2% (Urban), 86.5% (Rural)
- **TV**: 83.7% (Urban), 60.8% (Rural)
- **Radio set**: 45.6% (Urban), 43.5% (Rural)
- **DVD player**: 42.1% (Urban), 40.3% (Rural)

- **Computer**: 21.3% (Urban), 4.9% (Rural)
- **Internet access**: 18.1% (Urban), 4.7% (Rural)
- **Mp3 player (iPod)**: 11.7% (Urban), 6.7% (Rural)
- **iPad or tablet**: 10.0% (Urban), 1.6% (Rural)

(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 …

- **Antenna**: 53.4% (Urban: 79.9%)  
- **Cable**: 35.9% (Urban: 4.5%)  
- **Satellite TV**: 7.4% (Urban: 12.7%)  
- **Pay TV Network/Neighborhood Subscription**: 8.6% (Urban: 2.4%)

(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?

Hang Meas (TV) 28.5%
Cambodian TV Network 17.6%
Cambodian News Channel 12.0%
ABC Cambodia (FM 107.5) 11.1%
Bayon TV (Ch. 27) 9.2%
TV 5 7.7%

(Base: Total respondents, n=2,000)
Hang Meas TV
Hang Meas TV

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

% Very, Somewhat Interested

**Urban**
- Cambodia: 88.0%
- International perspectives on Cambodia: 71.0%
- Southeast Asia: 60.8%
- The world: 56.1%
- USA: 52.4%
- China: 34.1%
- France: 29.8%

**Rural**
- Cambodia: 83.5%
- International perspectives on Cambodia: 65.2%
- Southeast Asia: 51.9%
- The world: 50.2%
- USA: 48.2%
- China: 28.4%
- France: 24.4%
Types of News Interested

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

% Very, Somewhat Interested

- Cambodia: 86.5% (Age 15-34: 82.0%)
- International perspectives on Cambodia: 70.5% (Age 35+: 61.9%)
- Southeast Asia: 57.6% (Age 15-34: 49.4%)
- The world: 56.5% (Age 35+: 45.7%)
- USA: 50.1% (Age 15-34: 48.0%)
- China: 32.6% (Age 15-34: 26.3%)
- France: 25.9% (Age 15-34: 26.7%)
### 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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Urban</th>
<th>Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambodians are mostly free to speak their minds</td>
<td>74.6%</td>
<td>76.7%</td>
</tr>
<tr>
<td>Elections in Cambodia are free and fair</td>
<td>63.9%</td>
<td>70.4%</td>
</tr>
<tr>
<td>The situation in Cambodia is getting better and better each year</td>
<td>62.8%</td>
<td>66.4%</td>
</tr>
<tr>
<td>The Cambodian government protects workers’ rights</td>
<td>55.7%</td>
<td>63.5%</td>
</tr>
<tr>
<td>The grievances of ordinary Cambodians are handled justly in Cambodian courts</td>
<td>48.3%</td>
<td>55.6%</td>
</tr>
</tbody>
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### Sentiments Toward the State of the Society

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<td>The grievances of ordinary Cambodians are handled justly in Cambodian courts</td>
<td>57.1%</td>
</tr>
</tbody>
</table>

**Age 15-34**
- (n=878)

**Age 35+**
- (n=1122)

**Gallup**

**Broadcasting Board of Governors**
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.

<table>
<thead>
<tr>
<th>Problem</th>
<th>Urban</th>
<th>Rural</th>
<th>Age 15-34</th>
<th>Age 35+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Political crisis</td>
<td>19.9%</td>
<td>15.3%</td>
<td>16.1%</td>
<td>16.6%</td>
</tr>
<tr>
<td>Unemployment</td>
<td>13.0%</td>
<td>7.4%</td>
<td>10.4%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Traffic accidents</td>
<td>11.2%</td>
<td>7.9%</td>
<td>12.2%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>37.6%</td>
<td>41.3%</td>
<td>39.5%</td>
<td>41.7%</td>
</tr>
</tbody>
</table>
New Media Use
Cambodia’s Weekly Internet Use Since 2004

Weekly Internet Use

2004: 0.3%
2005: 2.2%
2006: 0.6%
2007: 1.1%
2008: 0.7%
2009: 1.8%
2010: 2.2%
2011: 3.6%
2012: 4.9%
2014: 12.0%

2011: ITU teams up with UNESCO to promote broadband in developing countries; provides assistance to Cambodia

2012: Telecommunications Regulator of Cambodia established


$180 million Chinese/Singaporean project promises 9,000 km of fiber-optic cables by 2015

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”**

<table>
<thead>
<tr>
<th>Category</th>
<th>15-24</th>
<th>25-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>11.1%</td>
<td>3.3%</td>
<td>0.5%</td>
<td></td>
</tr>
<tr>
<td>Urban</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phnom Penh</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No formal education</td>
<td>1.1%</td>
<td>3.0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary school</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lower secondary school</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Higher secondary school or more</td>
<td>46.9%</td>
<td>26.9%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Still, less urban and educated than in 2012

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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.

In 2012:
- News seeking the top activity
- 56% of weekly users watched online videos
- 54% listened to online audio

(n=267)
Urban and Rural Internet Users do Similar Activities

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

- Desktop computer: 18.6%
- Laptop computer: 15.2%
- Mobile phone: 89.2%
- Tablet: 7.6%
- Other device: 3.2%

4 out of 5 weekly Internet users access the Internet MOST through mobile.
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”)

<table>
<thead>
<tr>
<th>Category</th>
<th>15-24</th>
<th>25-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>68.8%</td>
<td>75.5%</td>
<td>66.9%</td>
<td>49.4%</td>
</tr>
<tr>
<td>Urban</td>
<td>72.2%</td>
<td>75.8%</td>
<td>69.6%</td>
<td></td>
</tr>
<tr>
<td>Rural</td>
<td>79.1%</td>
<td>89.0%</td>
<td>68.2%</td>
<td></td>
</tr>
<tr>
<td>No formal education</td>
<td>89.0%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary school</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lower secondary school</td>
<td>72.2%</td>
<td>75.8%</td>
<td>69.6%</td>
<td></td>
</tr>
<tr>
<td>Higher secondary school or more</td>
<td>43.2%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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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

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

- 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
Upcoming BBG Research Series events:

– Thursday, January 15: TBD

Learn more about the BBG Research series at bbg.gov/bbgresearch

Have a question? Contact us at 202-203-4400 or publicaffairs@bbg.gov