



# Overview of Cambodia

## INSIGHTS

Supporting Rationale  
For Proposed Strategies

# The Country



Official Name	: Kingdom of Cambodia
Capital City	: Phnom Penh
Religion	: Theravada Buddhism (95%)
Language	: Khmer (Official) 96.3%, others 3.7%
Provinces	: 25
Districts	: 185
Communes	: 1,621
Villages	: 14,073
Density	: 84 per Km <sup>2</sup>
Population	: 15,959,128 million (Est. 2016)
Population Growth	: 1.70% (Est. 2016)

# Cambodia's Area Divided to 4 Definitions

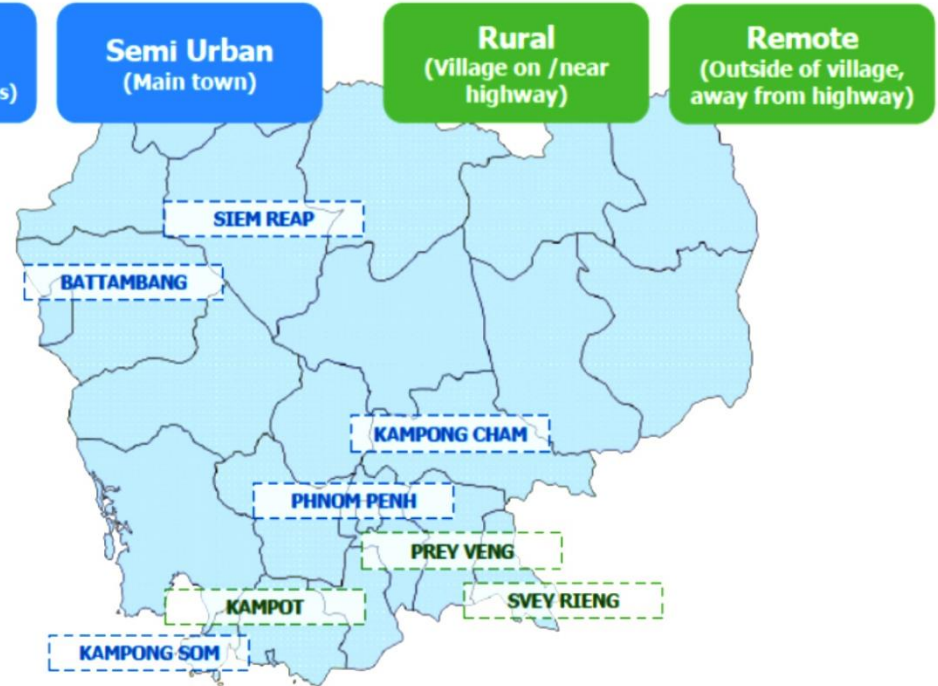
**Urban**  
(Phnom Penh/  
Provincial cities)

**Semi Urban**  
(Main town)

**Rural**  
(Village on /near  
highway)

**Remote**  
(Outside of village,  
away from highway)

**Urban** (Phnom Penh and 4 Provincial Cities),  
**Semi Urban** (District Centers within the Province),  
**Rural** (Area at least 20km from district center) and  
**Remote** (Further 15km away from rural area and not on main highway).



# Demographics

## Age Structure

0-15 Years : 32.2% (Male 2,568,947 | Female 2,548,435)

15-64 Years: 64.1% (Male 4,891,907 | Female 5,292,928)

65 Years And Over: 3.8% (Male 225,475 | Female 373,194) (2016 Est.)

## Median Age

# 24.2 Years

Male: 23 Years

Female: 25 Years (2016 Est.)



## Note:

Median Age At First Birth Among Women 25-29 (2016 Est.)

# Demographics

Birth Rate: 1,107 Live births average per day (2016 Est.)  
Death Rate: 352 Deaths average per day (2016 Est.)  
Net Migration Rate: -15 Migrant(s) average per day (2016 Est.)  
Urbanization: Urban Population: 20.9% Of Total Population (2016)

Sex Ratio

- 0-14 years: 31.6% (male 2,460,659/female 2,423,619)
- 15-24 years: 20.5% (male 1,565,135/female 1,596,099)
- 25-54 years: 38.9% (male 2,938,366/female 3,082,496)
- 55-64 years: 5.1% (male 298,733/female 482,588)
- 65 years and over: 4% (male 229,684/female 380,953) (2015 est.)

Population Overall: 0.94 Male(s)/Female (2015 Est.)

## More Girls

# Literacy of Population

8,318,883 persons or 77.14% of adult population (aged 15 years and above) in Cambodia are able to read and write. About 2,464,621 adults are illiterate.

Literacy rate for adult male population is 84.47% (4,322,397 persons). 794 985 are illiterate.

Literacy rate for adult female population is 70.53% (3,996,486 persons). 1 669 636 are illiterate.

Youth literacy rates are 91.11% and 91.87% for males and females accordingly. The overall youth literacy rate is 91.48%. Youth literacy rate definition covers the population between the ages of 15 to 24 years.

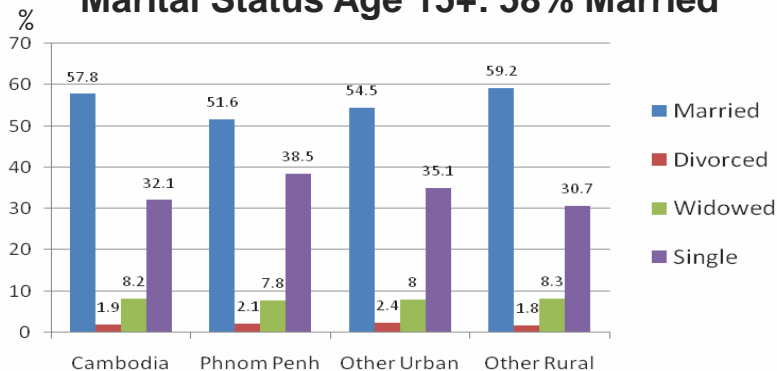
## **Ethnic Groups:**

Khmer 90%, Vietnamese 5%, Chinese 1%, Other 4%



# Social Status

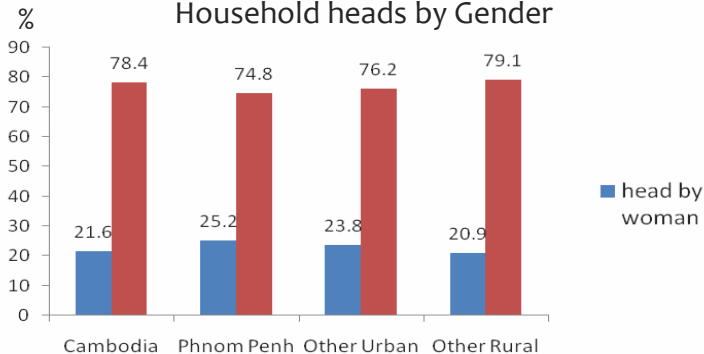
## Marital Status Age 15+: 58% Married



Majority in the Cambodian adult population is married.

## 78% Household Headed by Men

Household heads by Gender

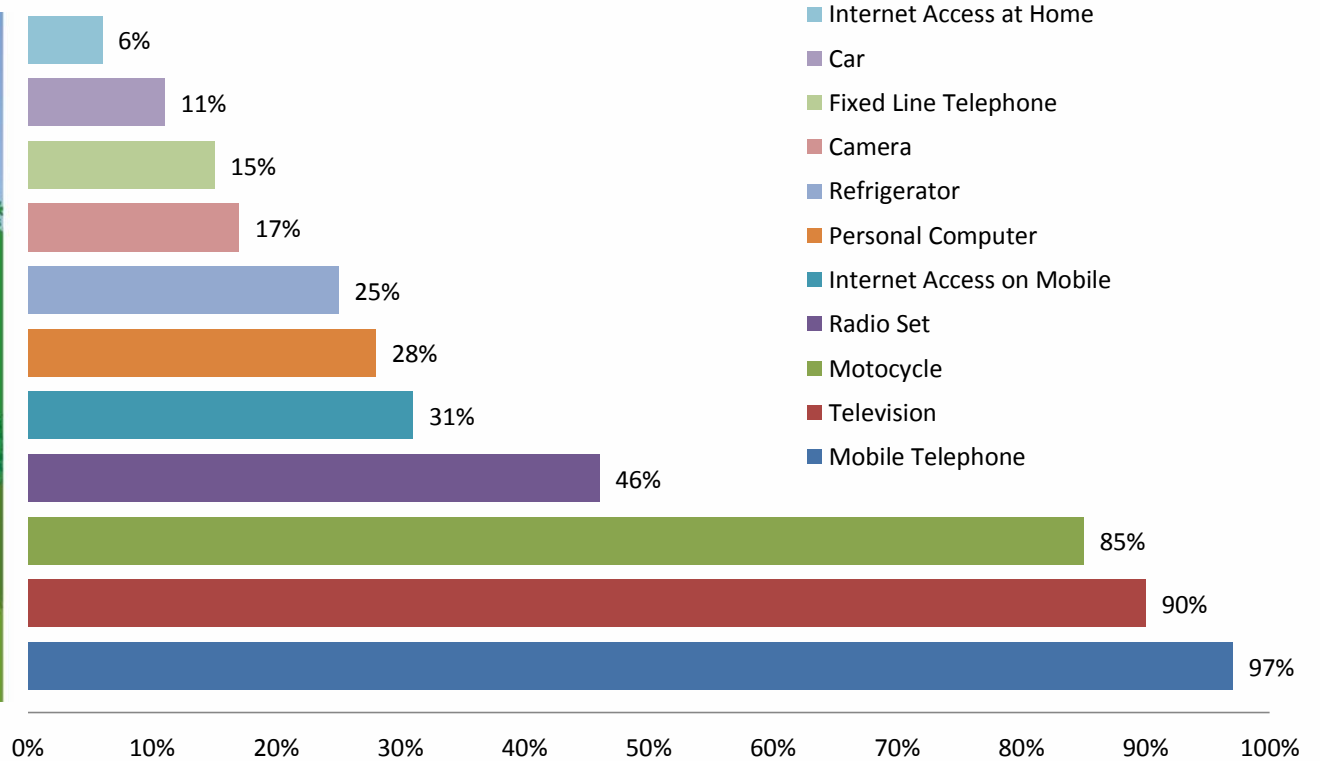


## Household Ownership

Majority of the households are headed by men. Households that are headed by women are more common in Phnom Penh as compared to the other provinces



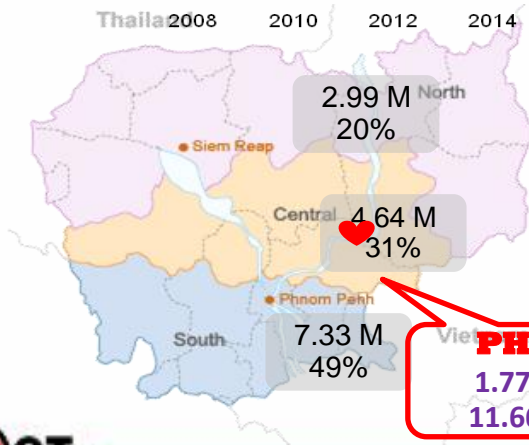
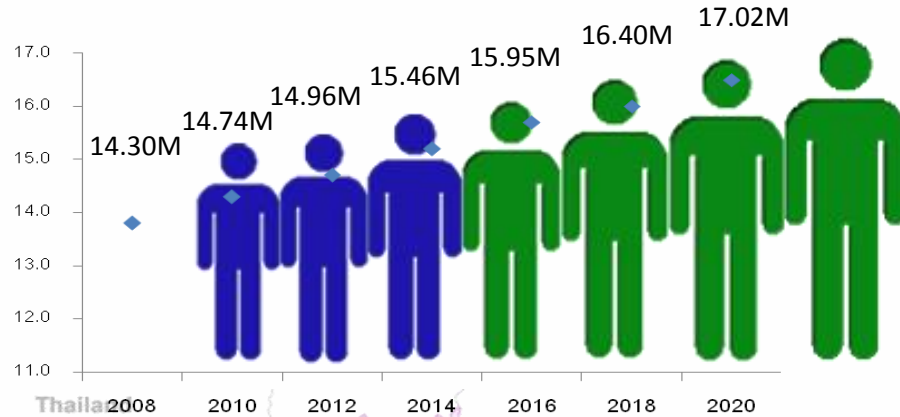
# HOUSEHOLD POSSESSIONS





# Demographics

## Mil Population Growth



Annual Growth Rate: 1.70%  
 Life Expectancy: Male 60.3 | Female 65.1  
 Sex Ratio: 96 (Female>Male)

Province	Population	%
Kampong Cham	1,263,497	8.17%
Phnom Penh	1,770,131	11.45%
Tbong Khmum	754,000	4.88%
Kandal	1,422,940	9.21%
Battambang	1,193,167	7.72%
Siem Reap	1,072,481	6.94%
Prey Veng	981,943	6.35%
Takeo	883,392	5.71%
Kampong Speu	790,711	5.12%
Banteay Meanchey	791,408	5.12%
Kampong Thom	681,180	4.41%
Kampot	622,042	4.02%
Kampong Chhnang	535,439	3.46%
Svay Rieng	502,287	3.25%
Pursat	441,768	2.86%
Kratie	370,450	2.40%
Sihanouk Ville	266,470	1.72%
Oddar Meanchey	244,395	1.58%
Preah Vihear	193,916	1.25%
Ratanakiri	176,192	1.14%
Koh Kong	145,273	0.94%
Steung Treng	130,287	0.84%
Pailin	102,383	0.66%
Mondul Kiri	78,182	0.51%
Kep	44,398	0.29%
<b>Cambodia - Total</b>	<b>15,959,128</b>	<b>100%</b>

# High Fertility Rate

## Births per Woman

1990

2000

2013

2015

5.7

children

3.8

children

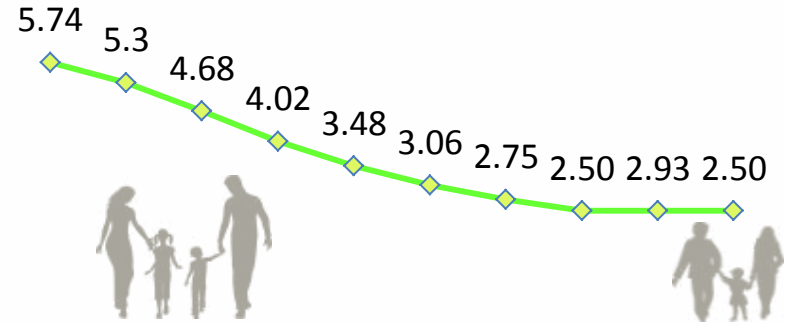
2.9

children

2.5

children

## More than 2 babies in a family



1990 1993 1996 1999 2002 2005 2008 2011 2013 2015

Despite the decline in the number of children, families desire to have children; mostly counting on children to look after them during old age. Fertility rates decline due largely to the easy access to contraceptives.

- Rural Fertility Rate: 3.3
- Urban Fertility Rate: 2.2
- Age at first birth: 25.8



# What's Available & Effective in Cambodia



# 8 MAIN Media Types



Print newspapers  
(KH – EN)



Websites  
Prints  
(On Line)



Print magazines



OOH



Cinemas



TV  
Cable & FTA



Social media



Radio channels

## 7 Others (Not at all less-important, but more targeted)



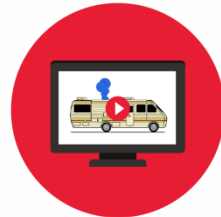
SMS



Trolley panels



Tourism publications



Indoor monitors  
commercial



Flyers  
direct mails



Ringside sponsorship



Music streaming

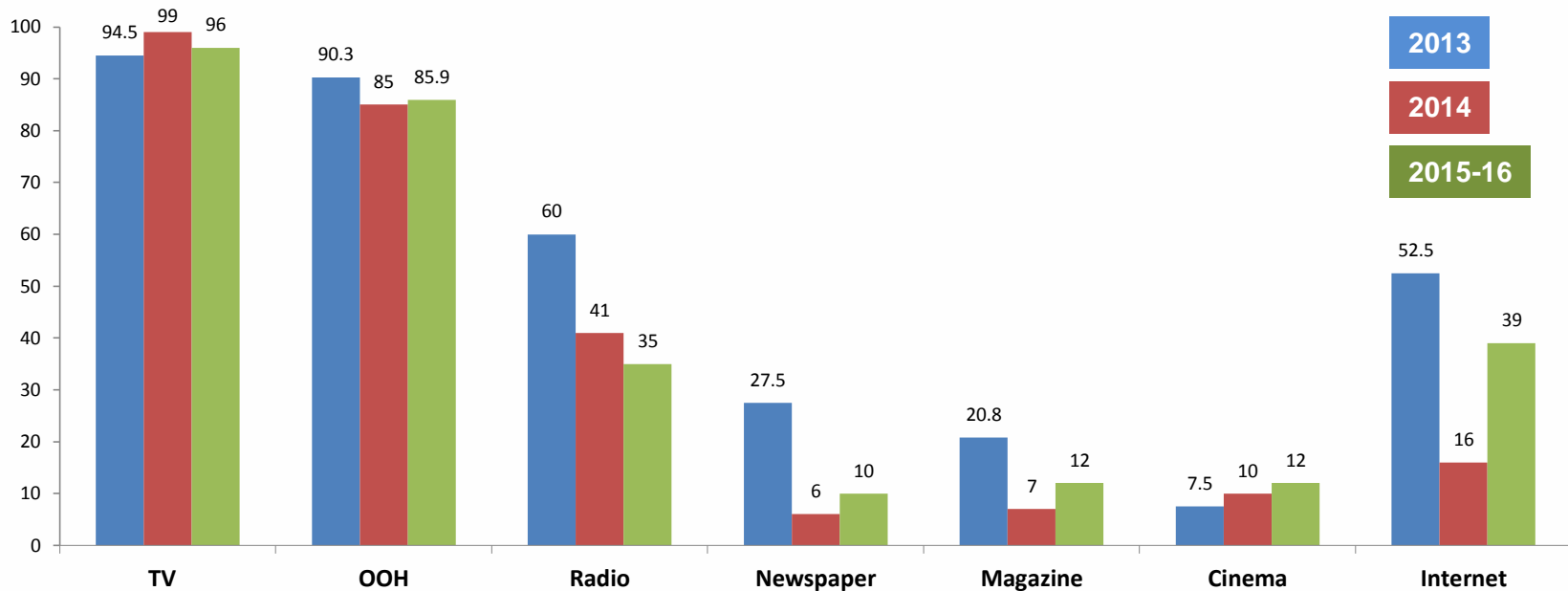
# Overview

- The media sector is largely unregulated leading to numerous TV, radio and print media establishments.
- No advertising or censorship governing body to monitor the ads.
- In recent years, new media platforms have been formed; example blogs and online social networking sites.
- Media consumption data was based on twice per year survey for the past 6 years. However, from 2013, surveys are conducted once a year.

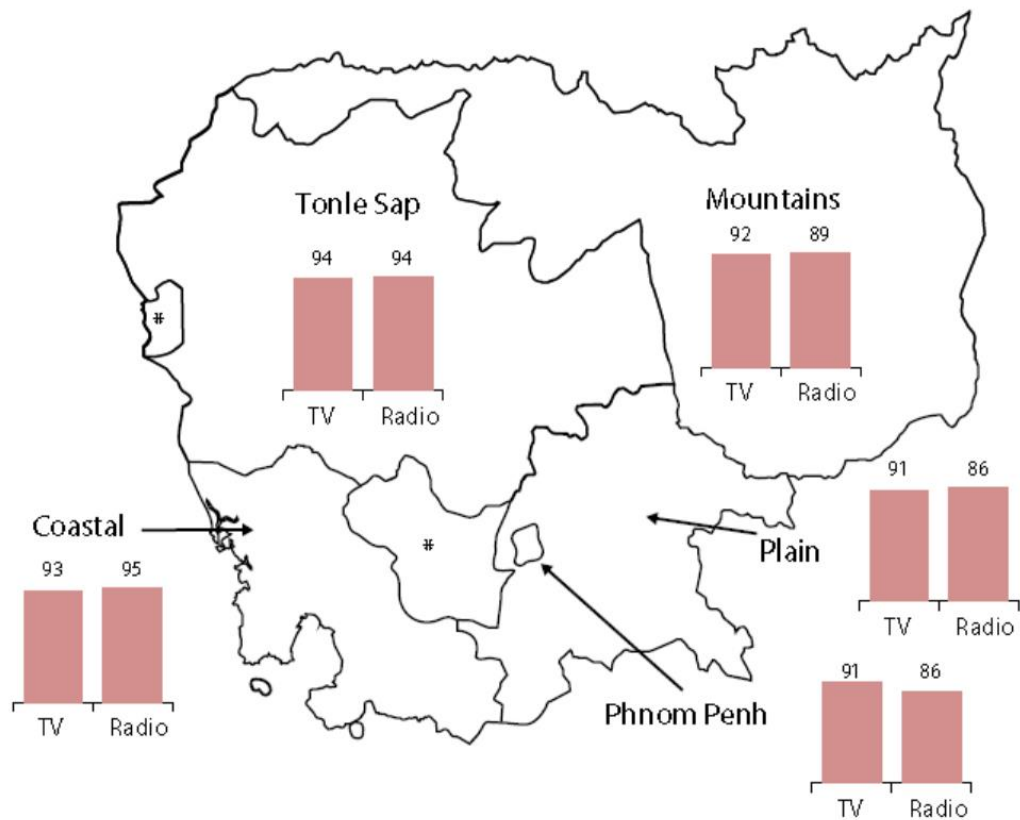


# Media Consumption – Whole Kingdom

TV, OOH & Radio are extremely popular - high exposure.  
Internet gaining popularity; Print declining and Cinema dipped.



# TV & Radio Access by Region



# TV Overview

## Rationale

- Majority of households own a TV i.e. 98% of Phnom Penh population
- TV is still the highest media consumption in Phnom Penh at 95%
- FTA (Free-to-Air) TV still dominates the advertising market with the best reach and cost efficiency. It takes over 70% of industry media spending





# Television

- **16 Free TV Stations** dominate the advertising market with the best reach with cost efficiency. It involves over 70% of industry media spending.

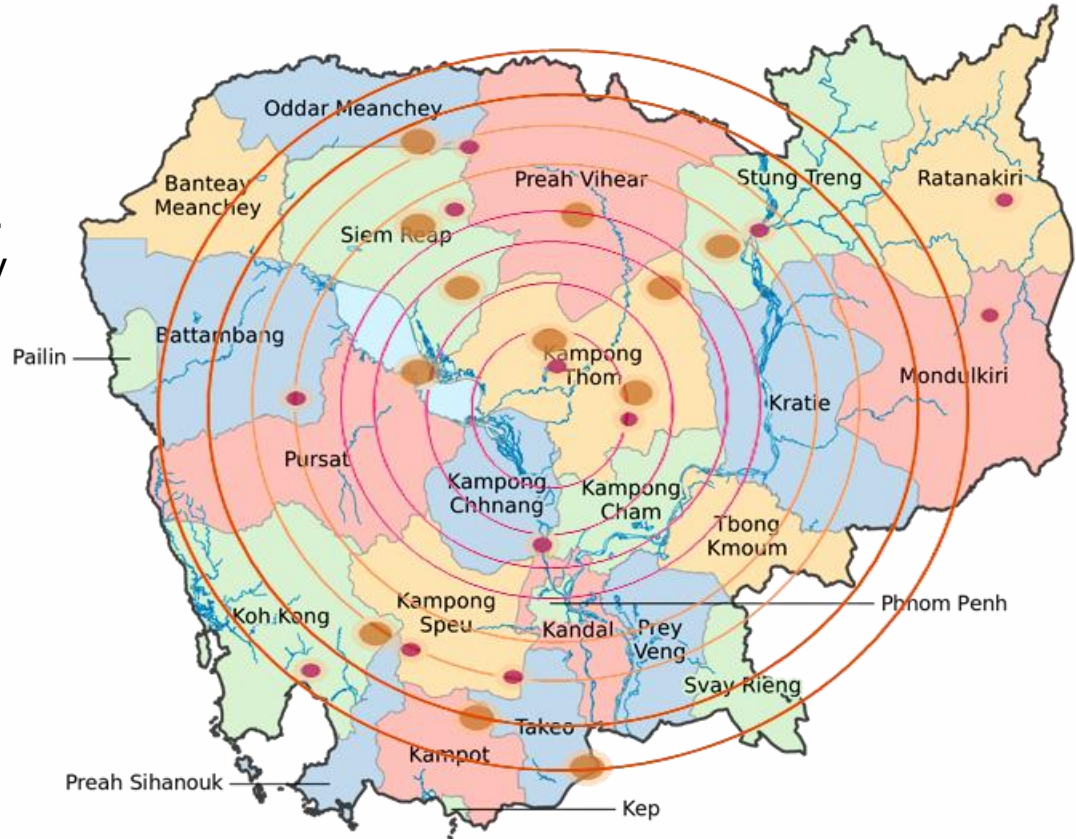


## Free TV :

CTN/ MYTV/ CNC/ Bayon/ SEATV/ TV5/ TV3/ TV9/ Apsara/ Hang Meas/ ETV/ PNN/ CTV8/ TV 7/ TV11/ Bayon TV & PNN



## Cable TV



# Cambodia TV Channels



There are  
**16 free-to-air  
TV channels**  
in Cambodia

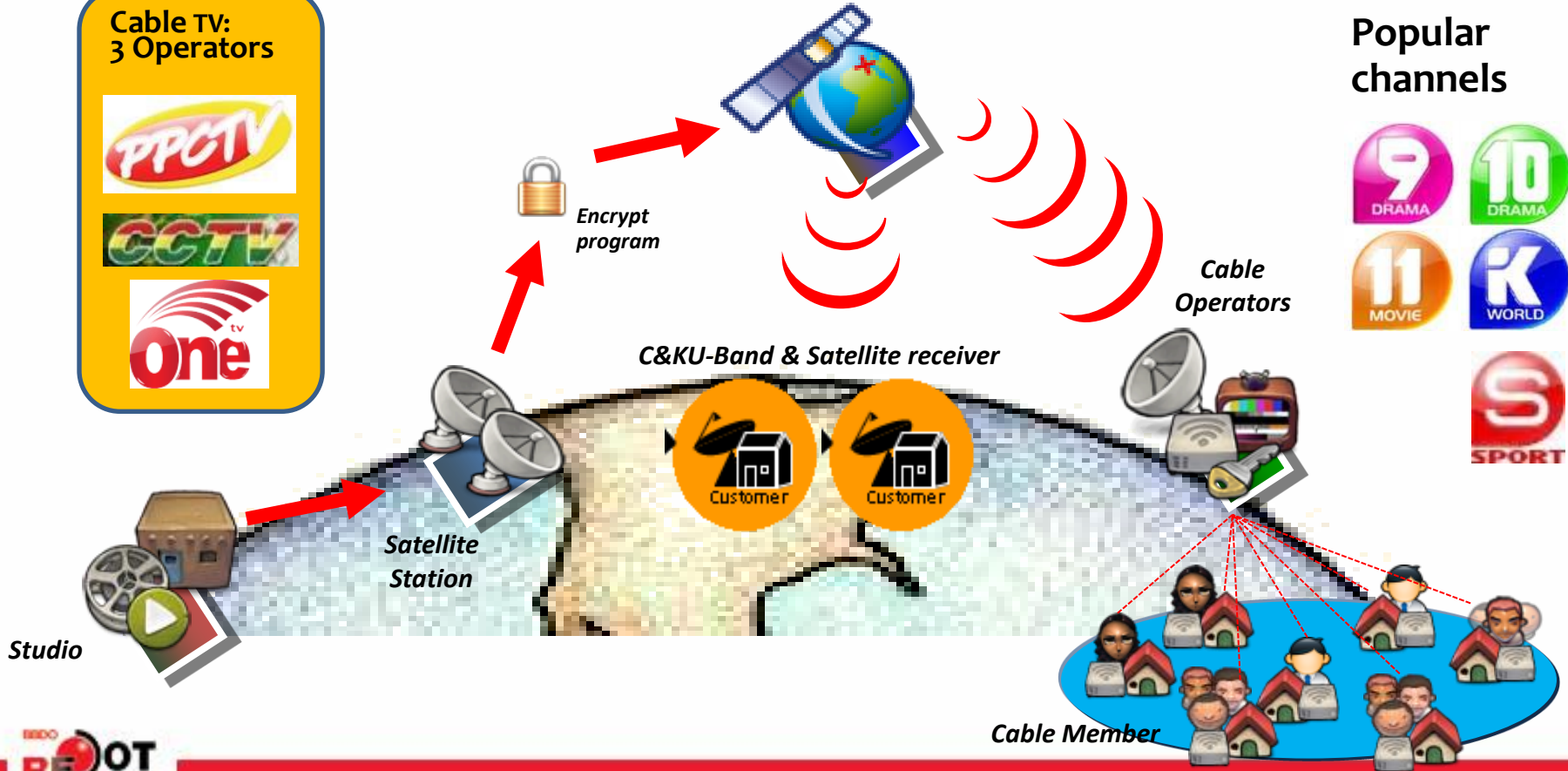
# Cable TV

Cable TV:  
3 Operators



PPCTV  
CCTV  
One TV

## PPCTV Popular channels



# Digital TV Channel



- Offers Digital Terrestrial Television or wireless cable-free TV
- Total of 60 Channel (National & International channels)
- Broadcast in 9 different areas: Phnom Penh, Battambang Province, Kampong Thom, Kampong Cham, Svay Rieng, Pursat, Siem Reap, Banteay Meanchey & SihanoukVille

# Cambodia TV Channels

Cable & Satellite TV are available in Cambodia.

There are 3 major cable distributors in Phnom Penh - Phnom Penh Cable TV (PPCTV) & Cambodia Cable TV (CCTV) and One TV. These add up to around 70 channels collectively.

- PPCTV accounts for over 50% of total subscribers in Phnom Penh (60km coverage around PP).
- While having more English Channels, these cable operators also show Chinese, Thai, Vietnamese and other networks.
- Also these operators are able to include exclusive channels, where they determine programming & contents. These channels sell commercial air time to advertisers as well.

Cable TV still lack sufficient research to measure viewership.

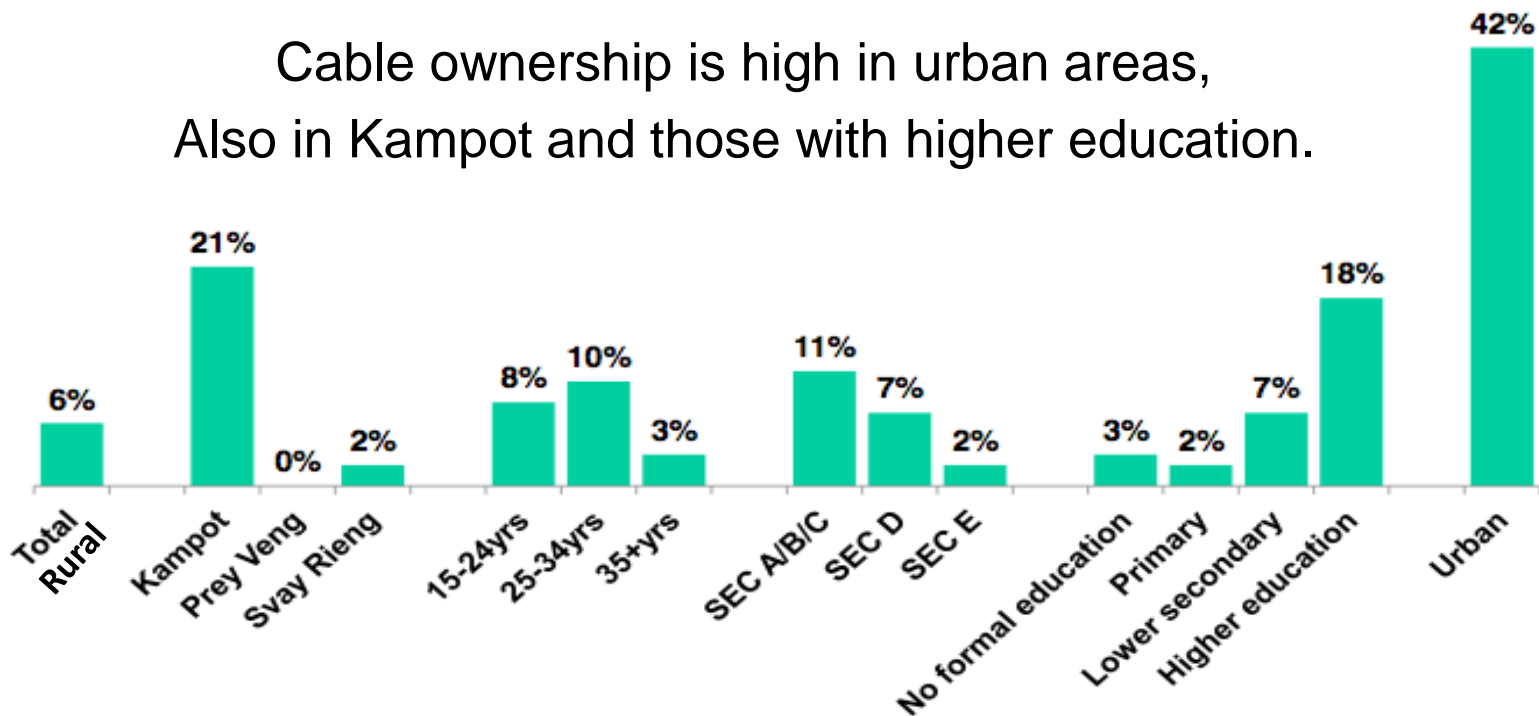
# Cambodia TV Channels

- Siem Reap, Battambang and Kampong Cham province have their respective independent cable operators.
  - Airtime may be bought.
- DigiTV a relatively new satellite TV distributor; no official numbers & penetration figures are available yet.



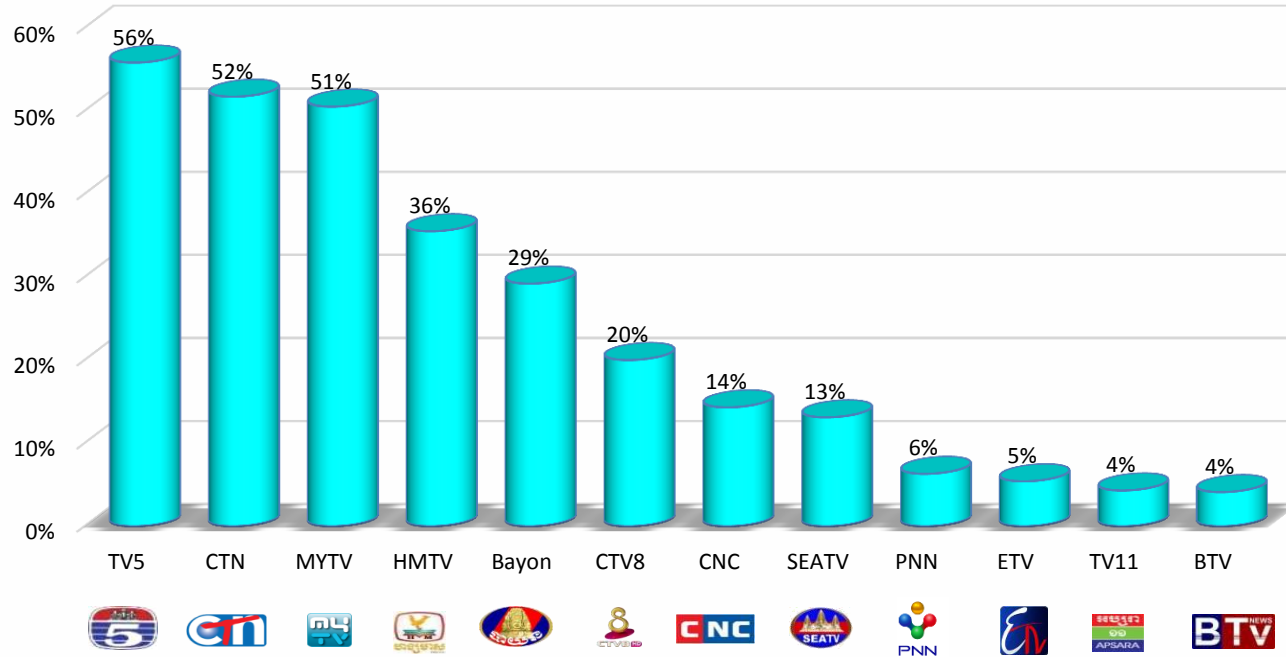
# Cable Ownership

Cable ownership is high in urban areas,  
Also in Kampot and those with higher education.



# Top Channels & Viewing Habit

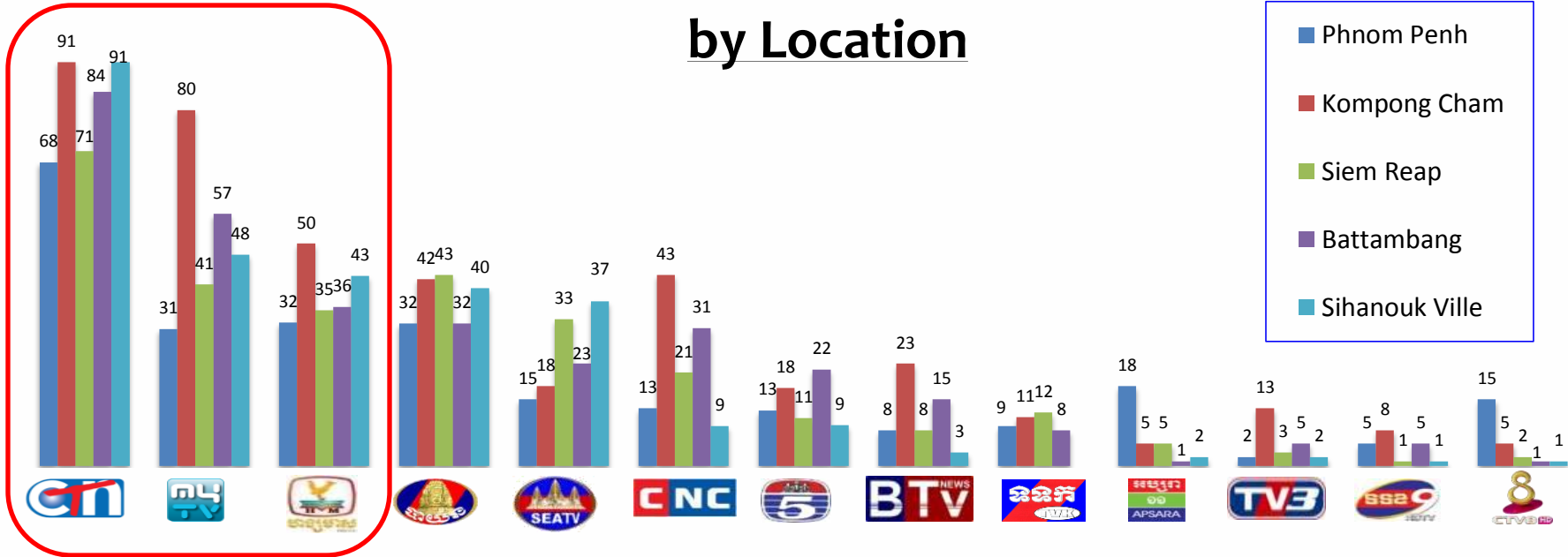
## Most Consumed Channels





# Top Channels & Viewing Habit

## Most Consumed Channels by Location

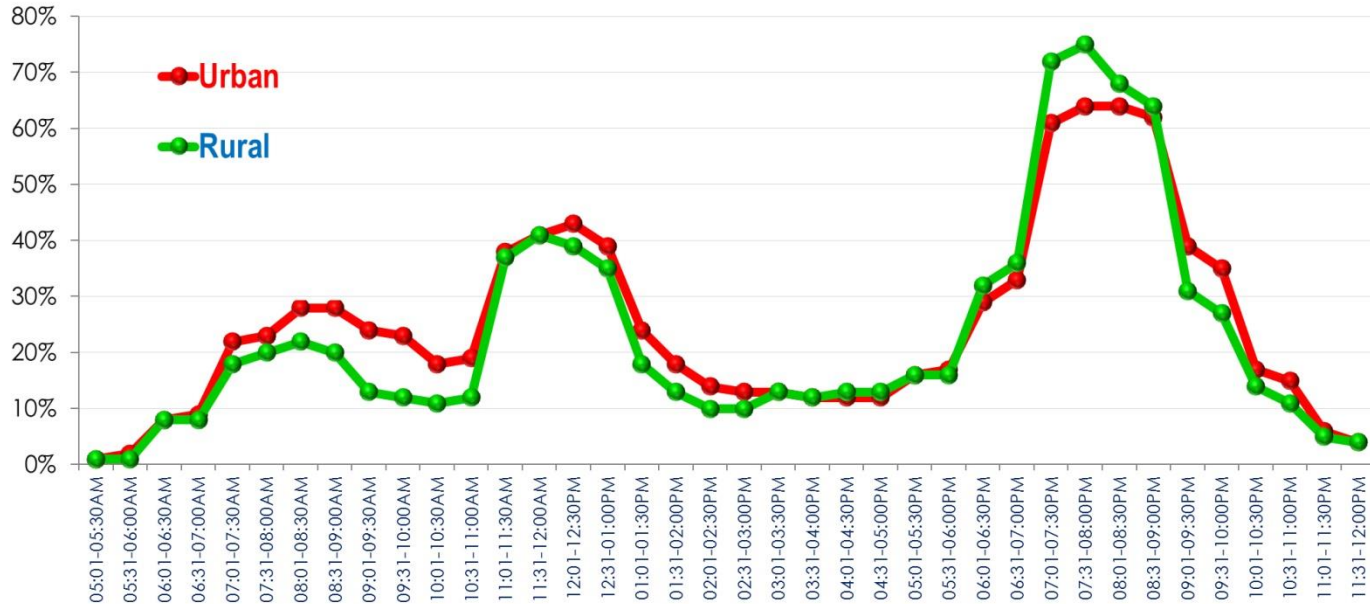


CTN is the top-choice channel in urban & Sami urban areas while TV5 remains the top-choice channel in rural areas  
 Urban Viewers' preferences: MYTV, Hang Meas, Bayon and Rural next choices: Apsara, MYTV, Hang Meas, Bayon

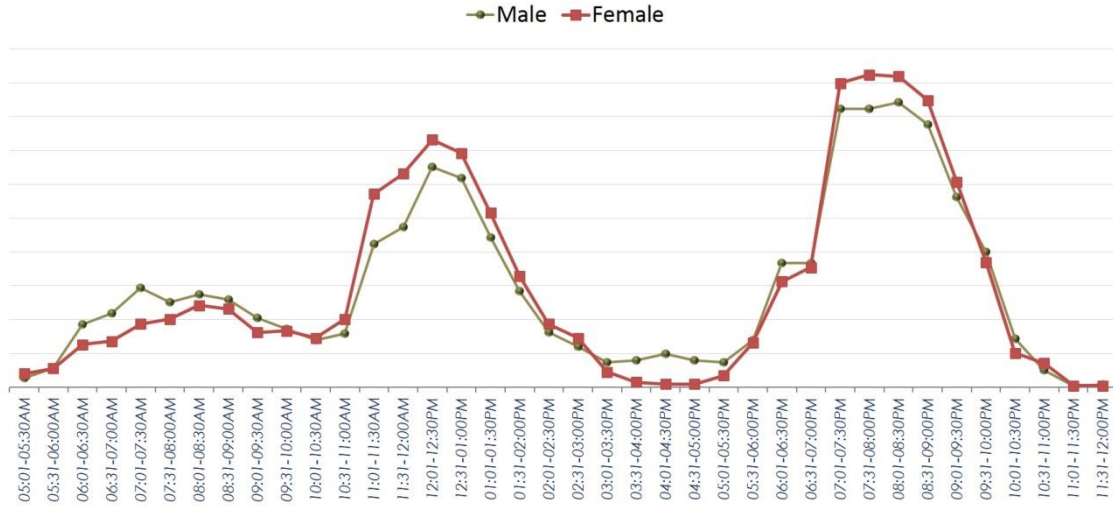
# VIEWER HABIT

## Noon & Night are prime time of TV

Viewership peaks every **Morning** (7am – 9:30am), **noon time** (11am-1:30pm) and primetime **evening** (6-10:00pm).

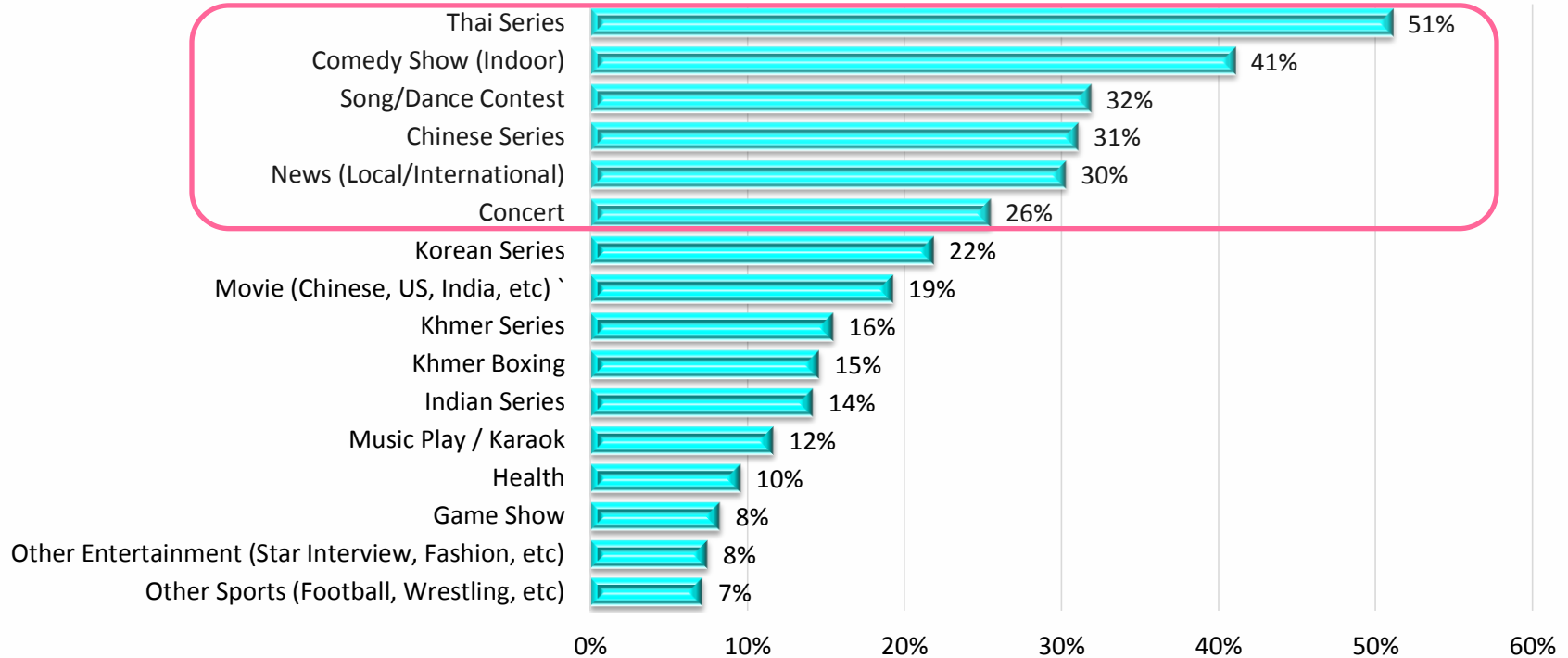


# VIEWER HABIT



\*Source: CMRD

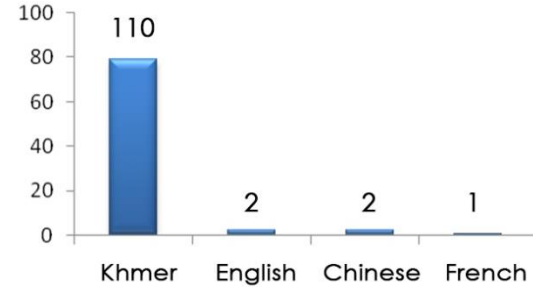
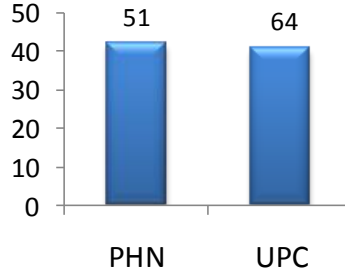
# Percentage share of TV program preference



# Radio

FM AM

Radio  
**115** Stations  
PP – 51  
Provinces - 64



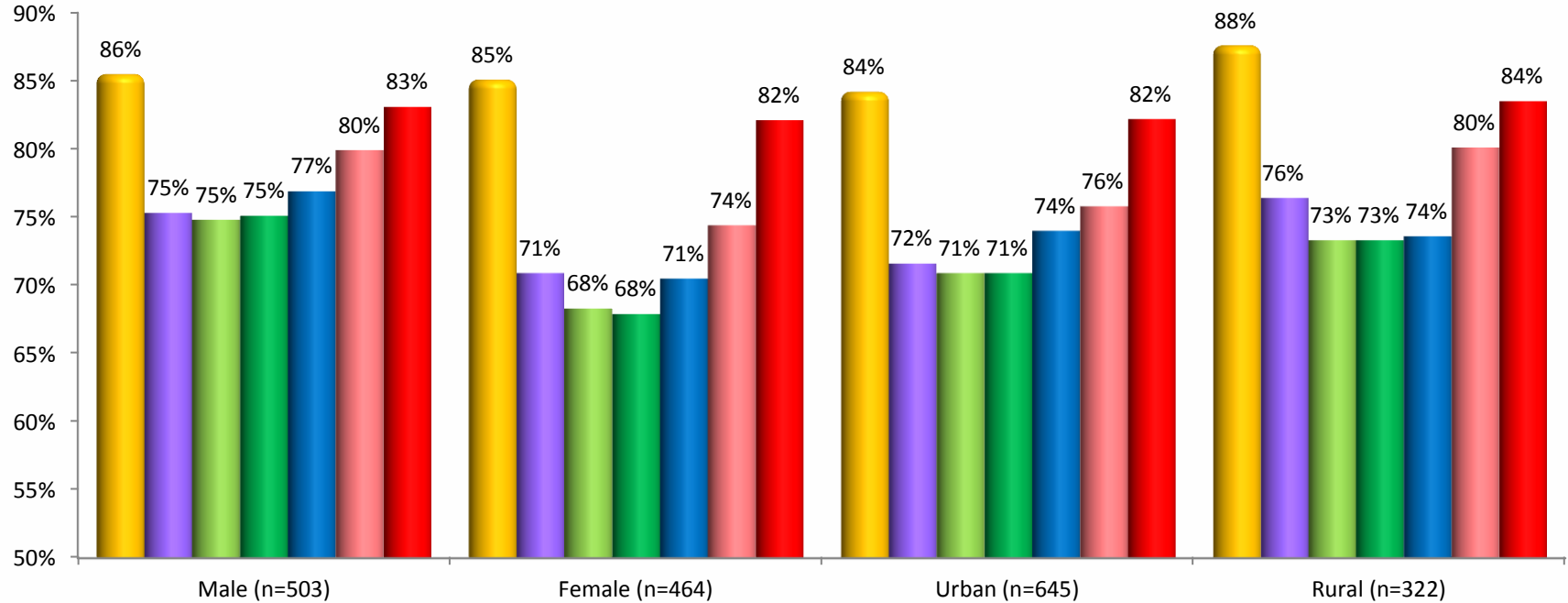
## Radio

- Mass -- Morning News & Pop Songs
- Teens, Young Adults (educated) tune in while driving
- Rural people, adults & the elderly - Morning News & Khmer Music

# Radio: Listenership Area

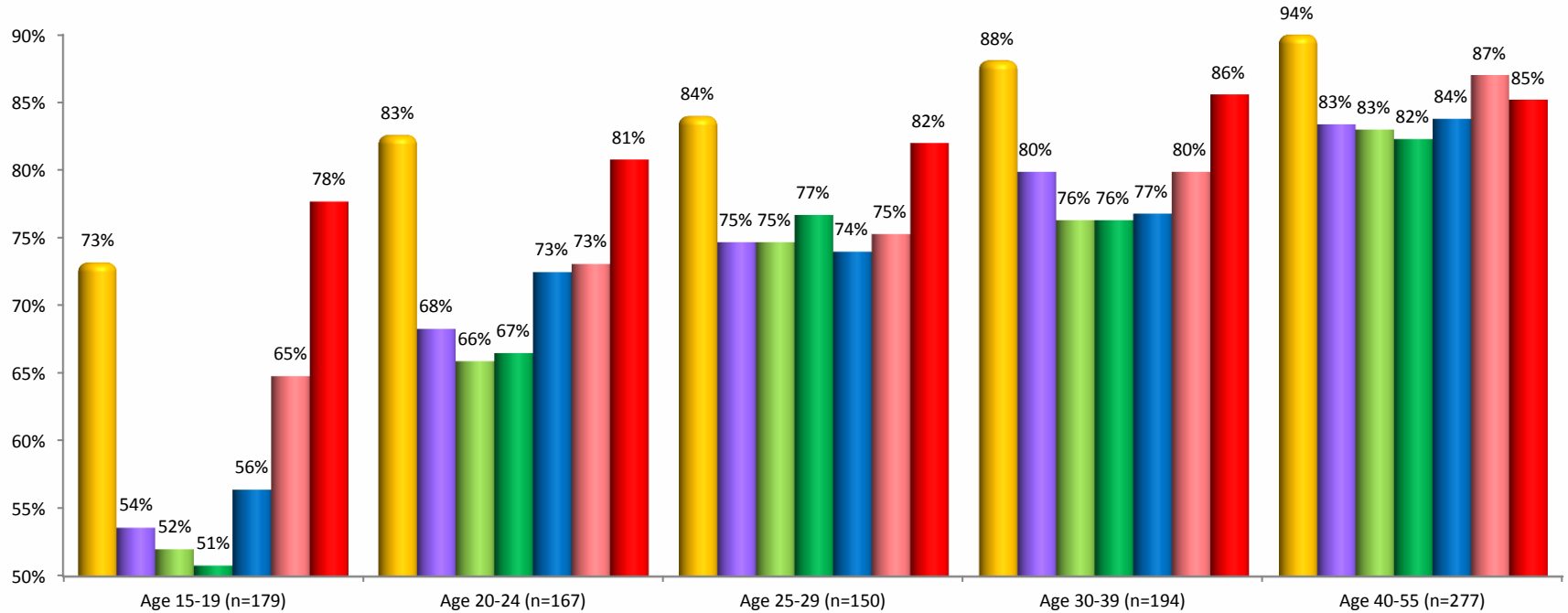
## By Gender & Area

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

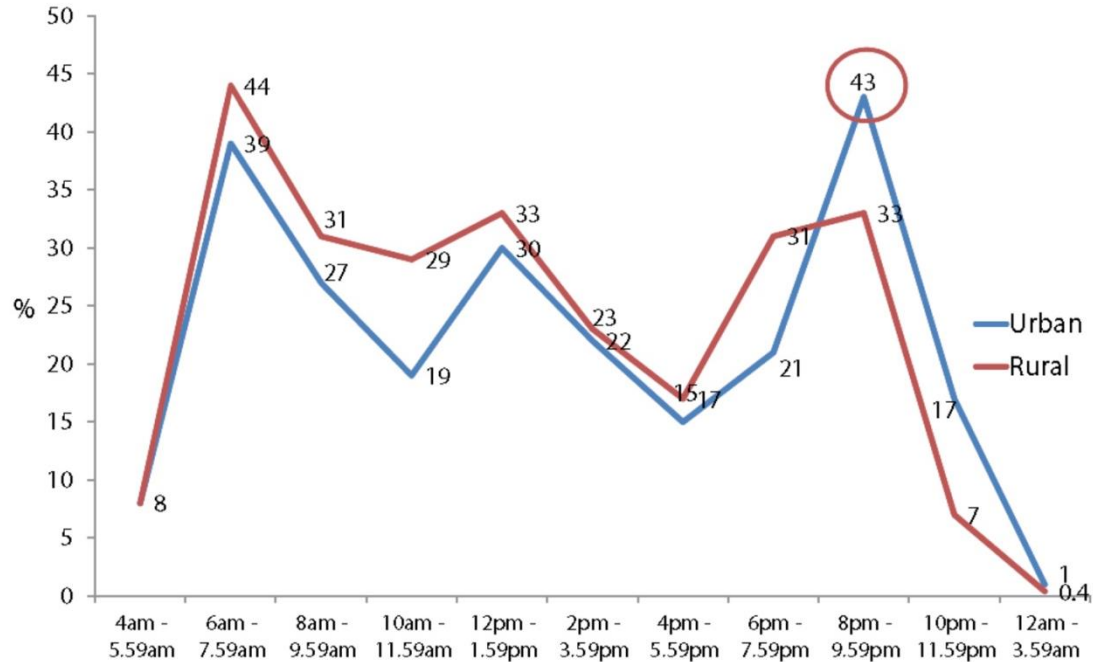


# Radio: Listenership Area By Age Group

■ Monday 
 ■ Tuesday 
 ■ Wednesday 
 ■ Thursday 
 ■ Friday 
 ■ Saturday 
 ■ Sunday

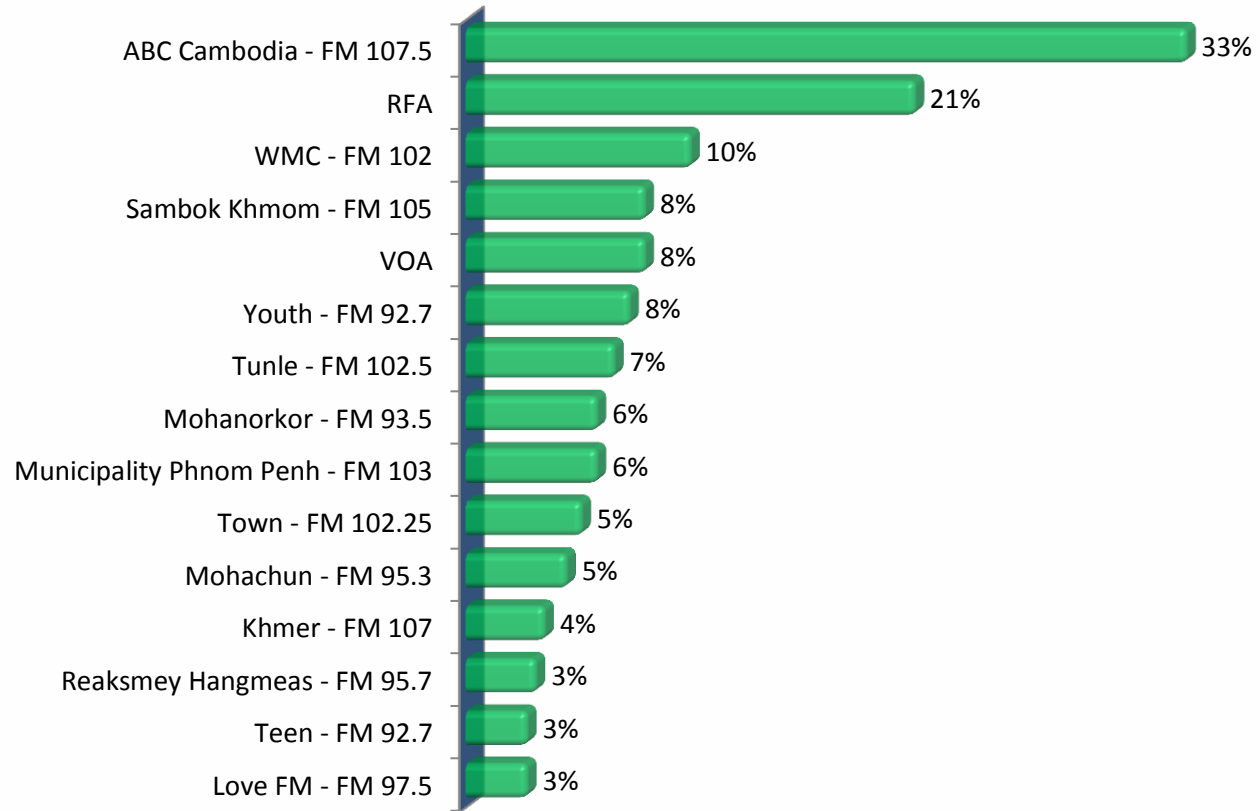


# Most Popular Listening Time by Location

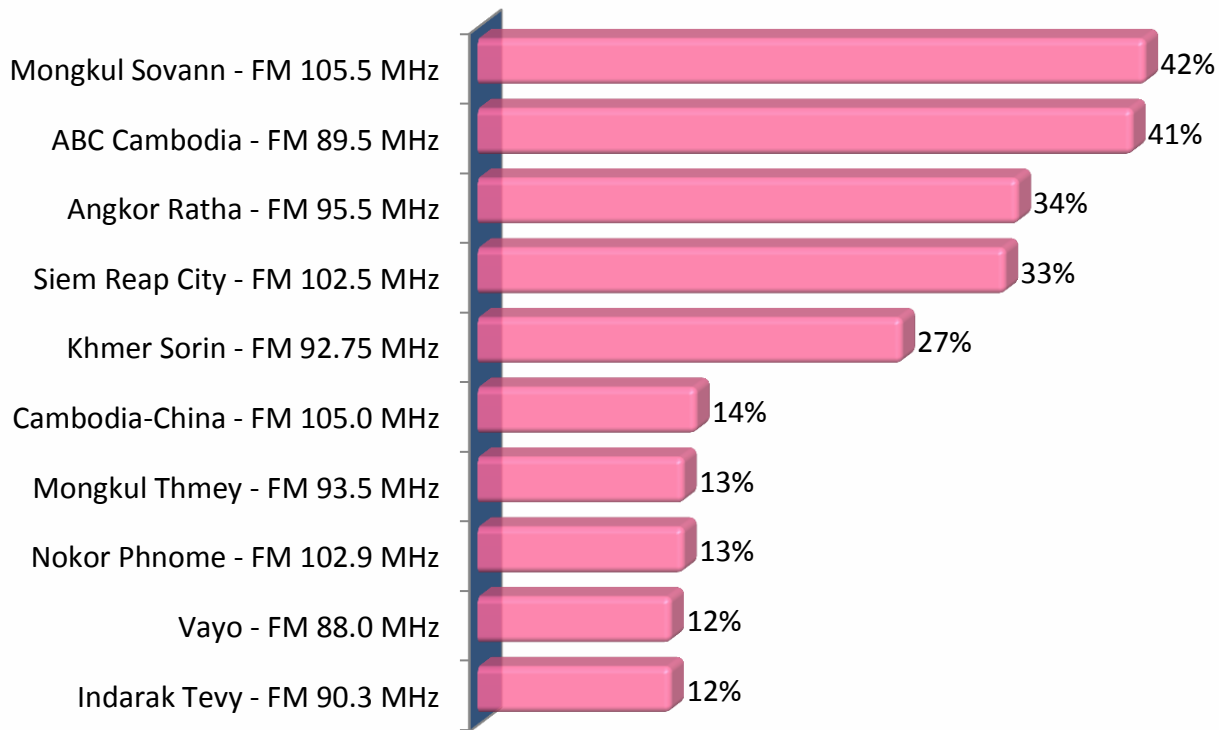




# Top 15 Station – Most Listener in Phnom Penh

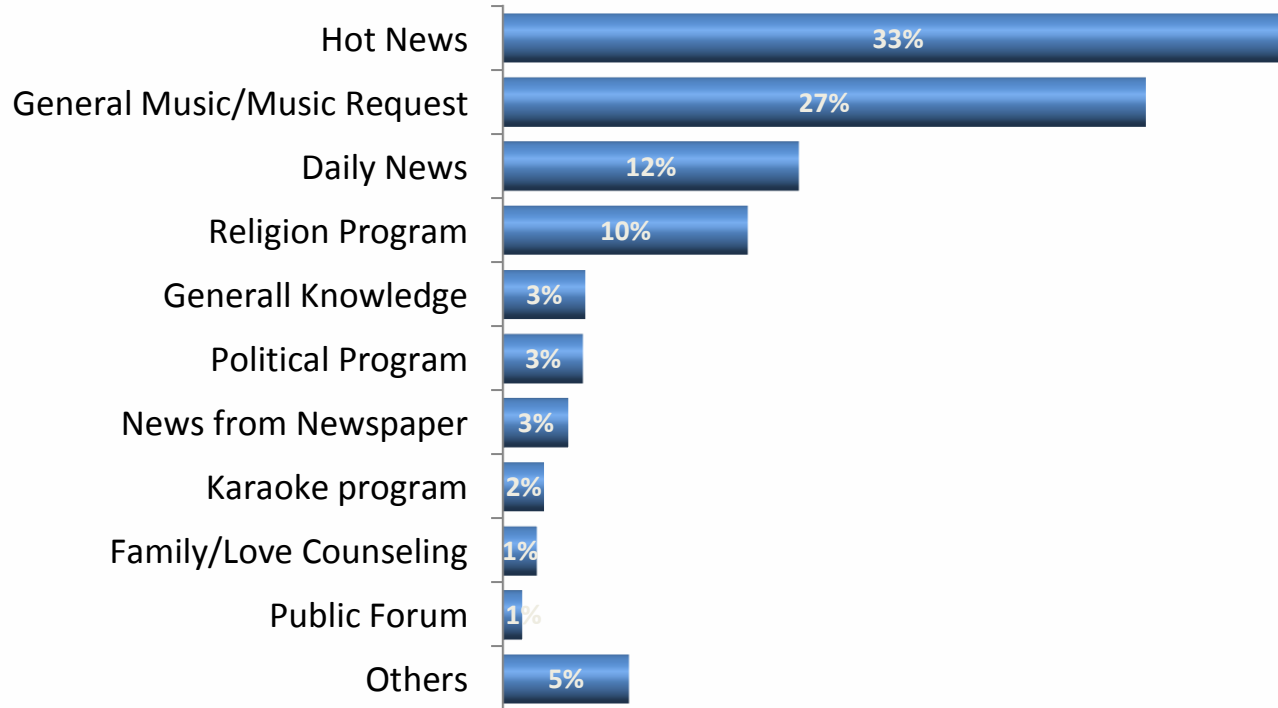


# Top 15 Station – Most Listener in Siem Reap



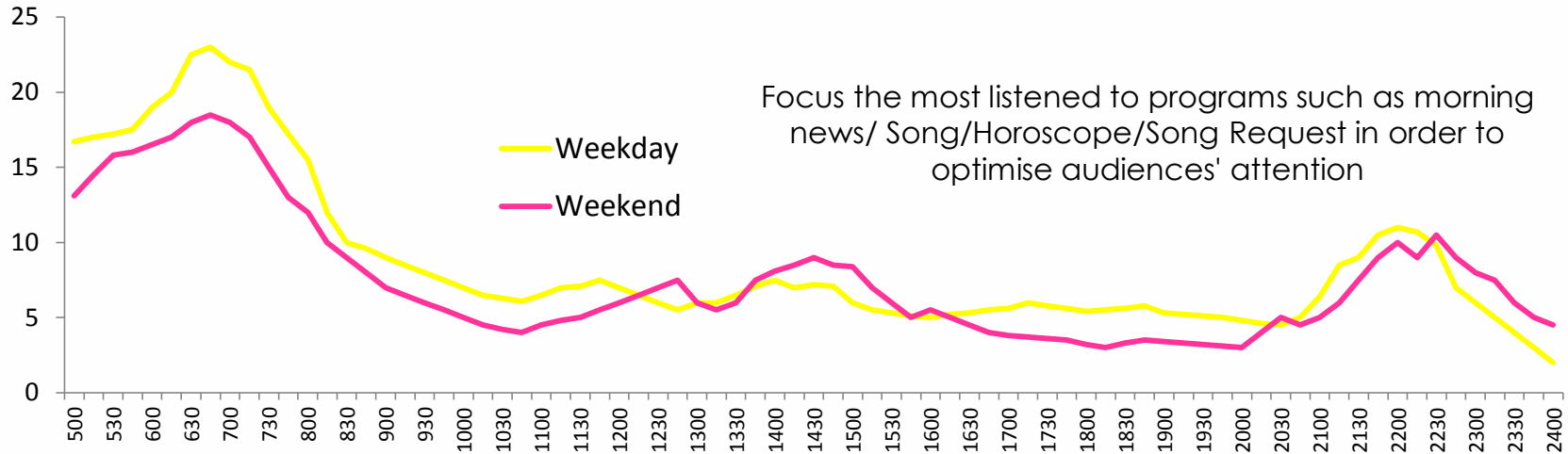
# Radio: Top Program & Listenership Habit

## Favourite Programs



# Radio: Top Program & Listenership Habit

## MORNING NEWS, SONG & HOROSCOPE ARE THE FAVORITE PROGRAMS



# Print

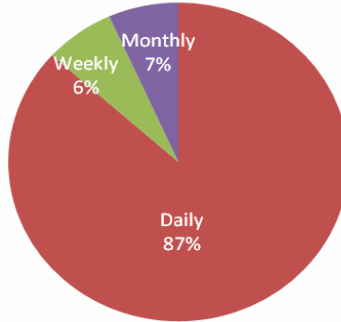


# Newspaper

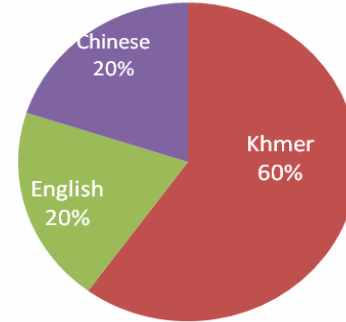
Newspaper  
15 Titles

Khmer Chinese English

## Frequency



## Language



Circulation  
5,000–30,000  
Copies/issue

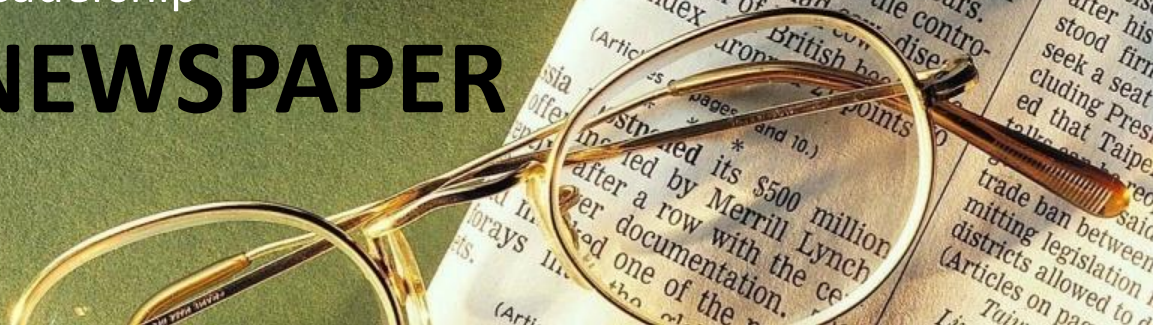


Newspaper is more mass, slightly skew towards males, people with higher education and the upper income.



Readership

**NEWSPAPER**



**WALL STREET**

© 1996 Dow Jones & Company

WEDNESDAY, MAY 15, 1996

**What's News—**

*Business and Finance*

\* \* \*

**BRITAIN PLEADED** with EU officials to reverse their decision to ban U.K. beef, but the European Commission is expected to formally reject the move today. Prime Minister Major, meanwhile, said he is considering proposals to slaughter cattle to allay consumer fears. The Dow Jones Industrial Average rose 100 shares amid the controversy surrounding mad cow disease. The S&P 500 index rose 10 points.

*World-Wide*

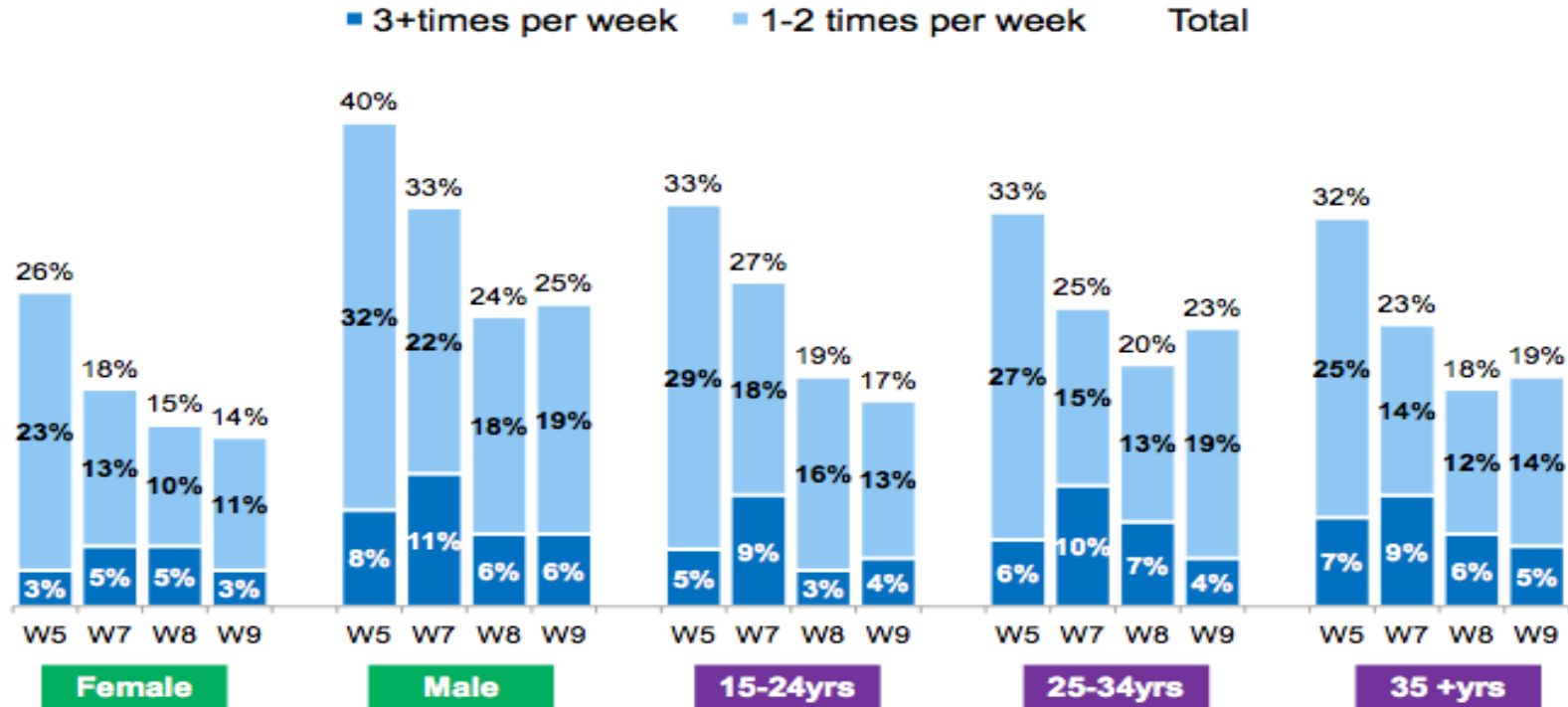
\* \* \*

**TAIWAN'S LEE** challenged China to make a peace initiative. President Lee squashed speculation that he would offer a major olive branch to Beijing after eight months of Chinese military exercises near the island. Lee, confident after his strong electoral victory Saturday, stood firm on Taiwan's determination to seek a seat in the U.N. Chinese leaders, including President Jiang Zemin, insisted that Taipei drop such ambitions before talks could be reopened. Separately, Taiwan said it will begin easing a trade ban between the two countries, permitting legislation in June. Taiwan districts allowed to do so.

(Articles on page 2)

# Newspaper Readership (Gender)

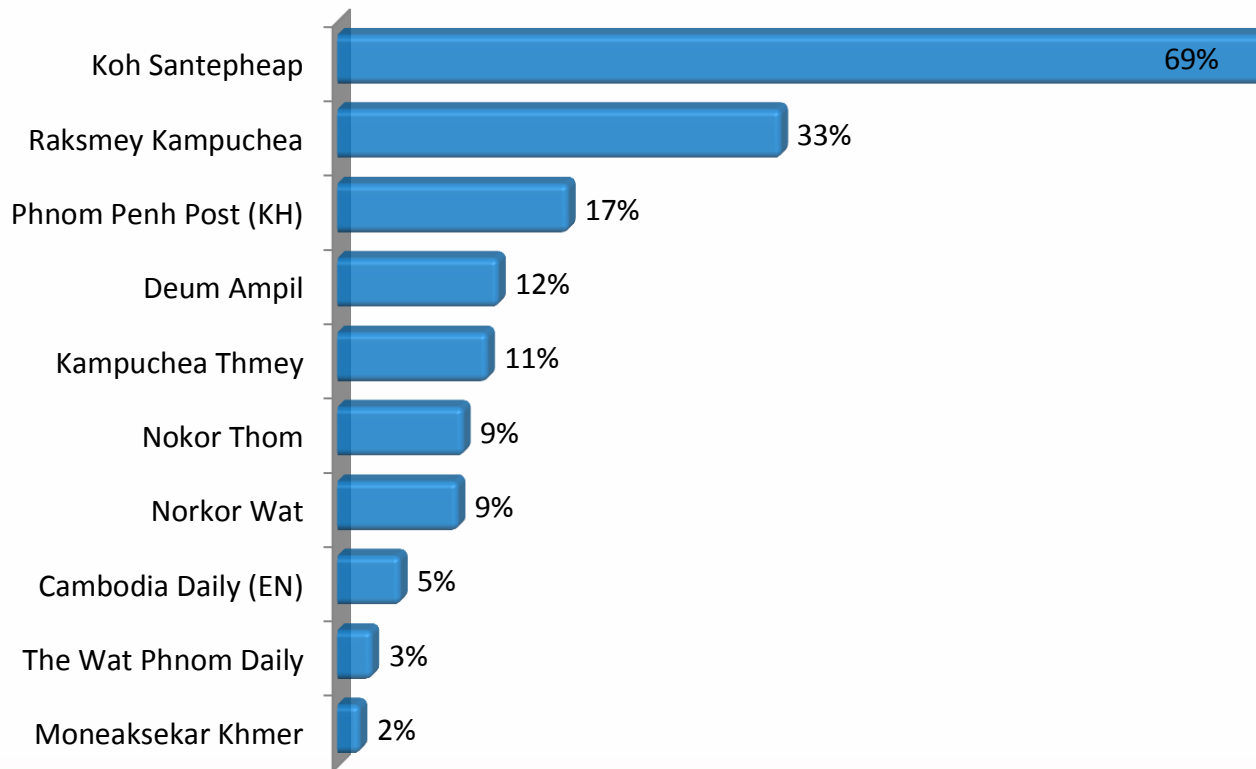
Readership went up a bit among males and among the 25-up. Downtrend among females.





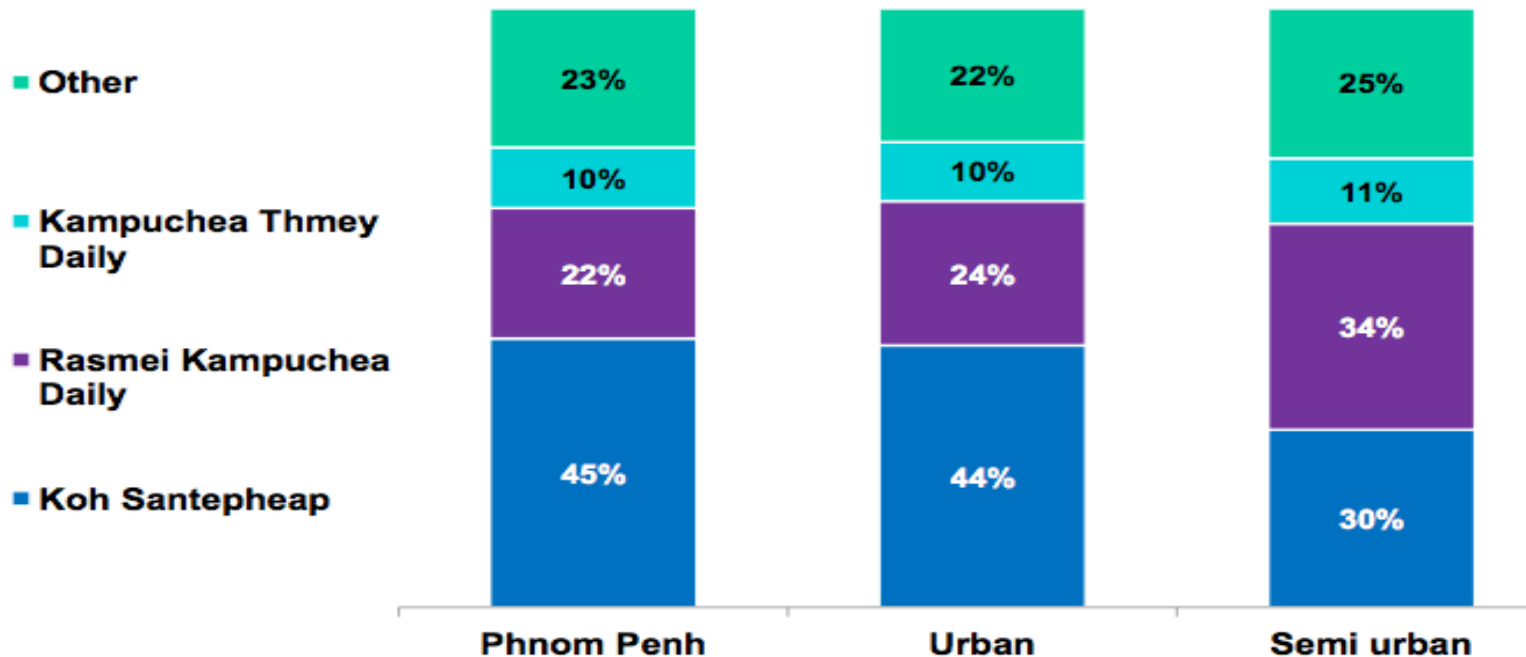
# Top Titles

Koh Santapheap remain as top choice newspaper followed by Rasmei Kampuchea. Top 3 had increased readership.

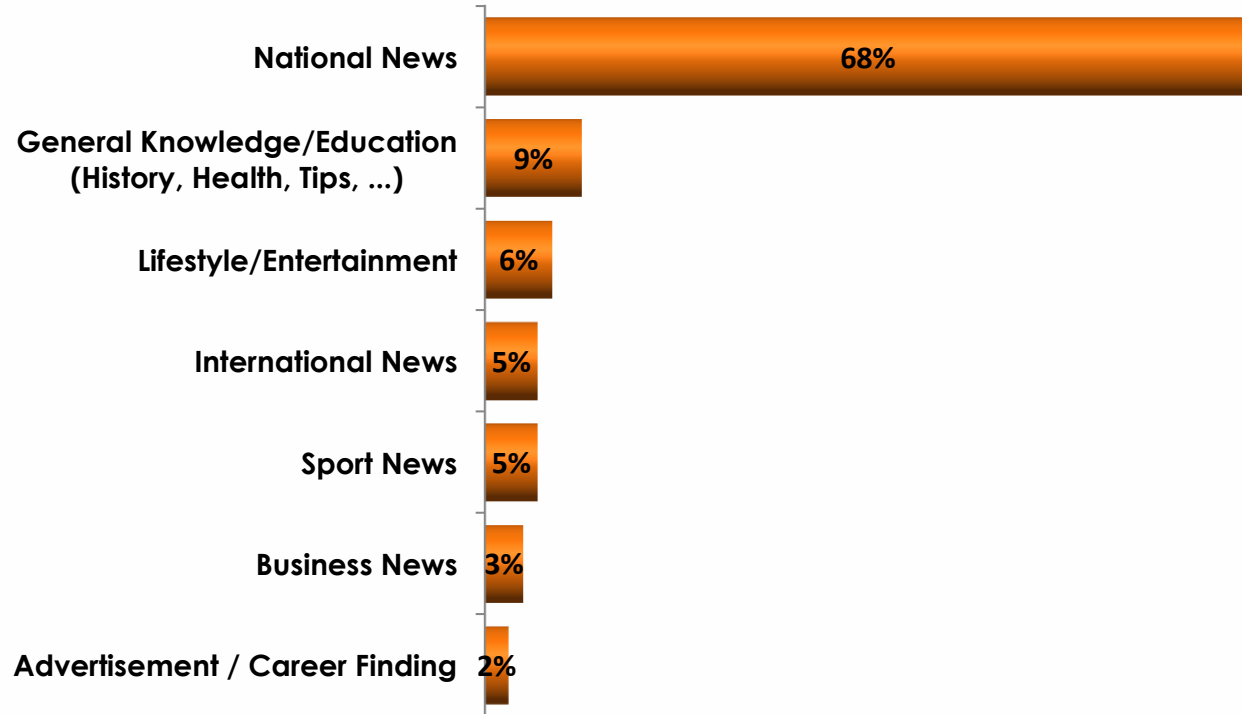


# Readership (Area)

Koh Santepheap is highly preferred in most areas except in Semi-urban where Rasmei is more preferred.



# Most Read Section





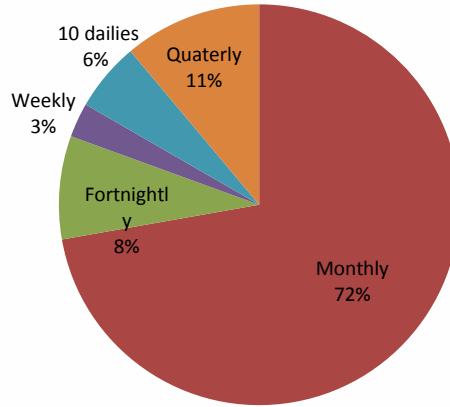
Readership

**MAGAZINE**

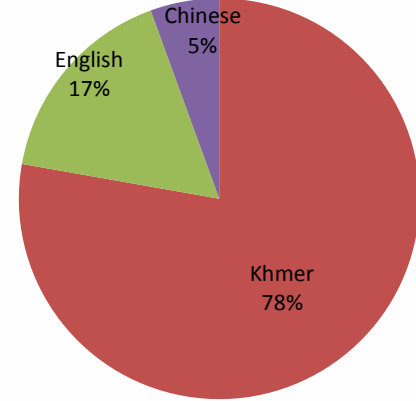
# Magazine



## Frequency



## Language



Circulation  
5,000–15,000  
Copies/issue

Bilingual



English

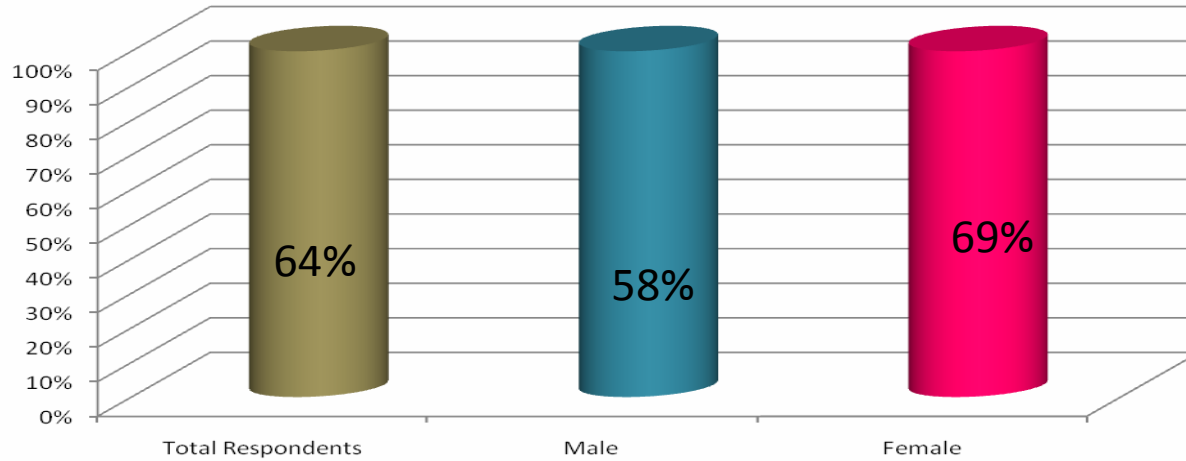


Khmer



Magazine skews towards Female, Young & Adults, Lower to higher Education, Medium to upper classes.

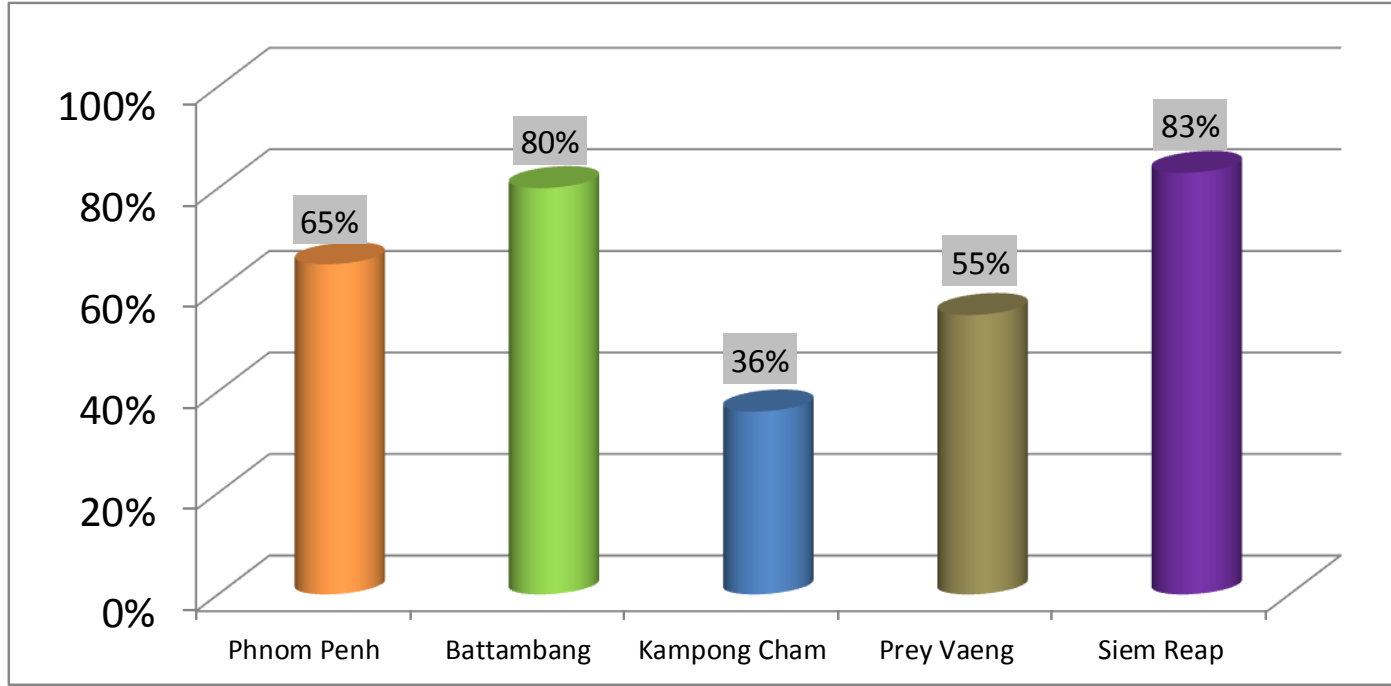
# Magazine Readership by Gender



Magazine penetration at 64% which is being driven by female market with 69%

# Magazine Readership by Area

Siem Reap has been monitored to have high consumption on Magazine amongst all the areas followed by Battambang.



# Top Magazines

LIFESTYLE / FASHION – (Bilingual)



ENGLISH PUBLICATIONS

KHMER PUBLICATIONS - MASS



Angkor Thom Magazine

The Popular Magazine



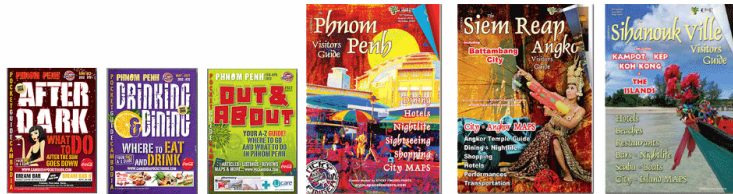
# Tourist Guide Books

With Ministry of Tourism



## Food Delivery Books

### Pocket Guide



# Most Preferred Contents





CINEMA

# Cinema

The Cineplex and Legend Cinemas are the newest Big Screens in Phnom Penh. They attract expats in town as well as young, educated and people with disposable income. These cinemas show new movies.

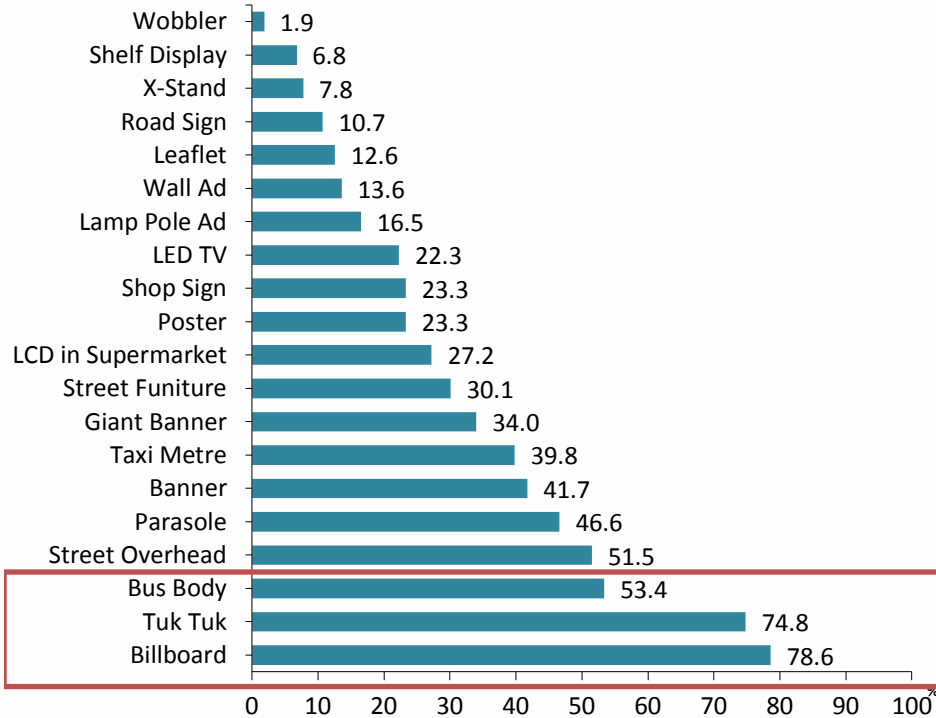
However, ads can only be shown before the movie and always back to back  
With many other ads – too rushed. The popularity of cinema ad has dipped pretty badly.



OOH



# OOH



# LED Exposure

## LED Venue

- Neang Kong Hing Circle
- IBC Trosok Paem
- ABC Senthormok
- Olympic Basin
- IBC Kampunchea Krom
- Monivong Blvd - Secret Recipe
- Monivong Blvd - Paradise Hotel



## Viewership Profiles:-

- Male and female
- Aged from 18 to 55 years old
- Travel along to town at least once or twice per day

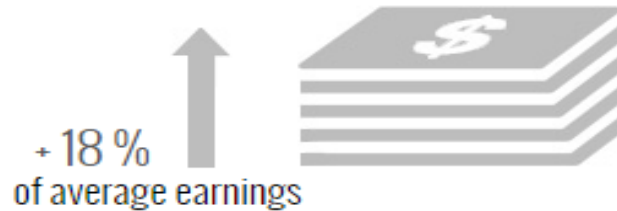


Digital Online



# Social Media In Cambodia

For the brands most engaged on social networks :



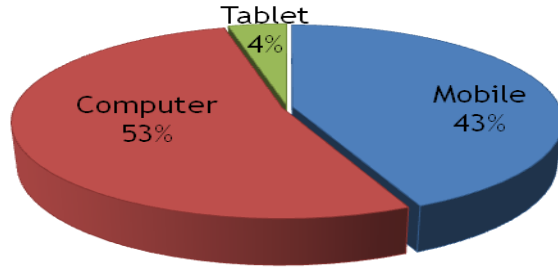
34% of bloggers post opinions about brands and products

78% of consumers trust peer recommendations (when only 14% trust advertisements...)

- In 2015, internet usage in Cambodia grew at a rate of 42.7 percent, according to a report released by the Ministry of Posts and Telecommunications last year.
- 92% of primary devices used by Cambodians to connect to Facebook are via mobile phones, one of the highest mobile penetrations of any country in the world.

# Internet Habit

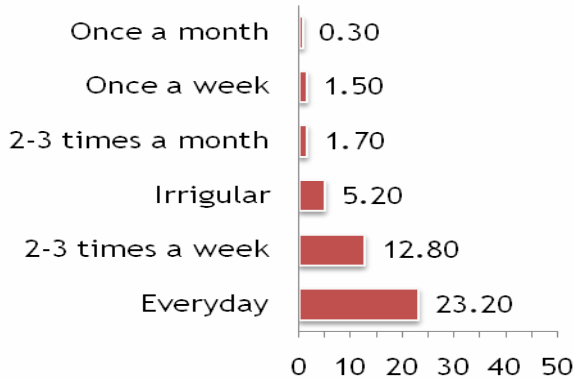
## Internet Connection Devices



Although computers are more attractive tools to get online, Mobile still the most utilised tool for online users.



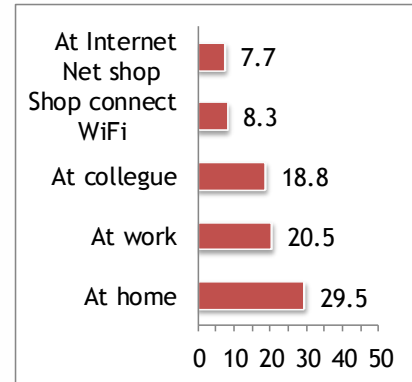
## FREQUENCY



## PURPOSE



## PLACE



# Top 15 Visited Websites in Cambodia

● The top 15 sites by traffic are:-



Facebook

: [www.facebook.com](http://www.facebook.com)

YouTube

: [www.youtube.com](http://www.youtube.com)

Google

: [www.google.com.kh](http://www.google.com.kh)

Google

: [www.google.com](http://www.google.com)

Sabay

: [www.sabay.com.kh](http://www.sabay.com.kh)

Khmer Load

: [www.khmerload.com](http://www.khmerload.com)

Koh Santepheap

: [www.kohsantepheapdaily.com.kh](http://www.kohsantepheapdaily.com.kh)

Fresh News Asia

: [www.freshnewsasia.com](http://www.freshnewsasia.com)

Blogspot

: [www.blogspot.com](http://www.blogspot.com)

Khmeread

: [www.khmeread.com](http://www.khmeread.com)

Yahoo

: [www.yahoo.com](http://www.yahoo.com)

Blogger

: [www.blogger.com](http://www.blogger.com)

Google

: [www.google.co.id](http://www.google.co.id)

Health

: [www.health.com.kh](http://www.health.com.kh)

**81%** of people say that posts by their friends on social media influence their purchases



Public ▾

Post

Facebook is the most popular social network for connecting people with those around for Cambodians ... Friends, Family, Coworkers or simply others with similar interests.

# FACEBOOK

The mobile telecom boom has fueled the equally impressive rise of Facebook as the most popular website and social network in Cambodia.

The estimate of Cambodian Facebook users are now over 3,800,000 active users as of March, 2016 and Facebook's official statistics showing around 100,000 new users signing up to the social network in Cambodia each month. The fact that 89.3% of Cambodian Facebook users are aged between 18 and 35 is something that has not been missed by web-savvy businesses which have become increasingly active with dedicated Facebook Pages setup to promote their brands, products and services.

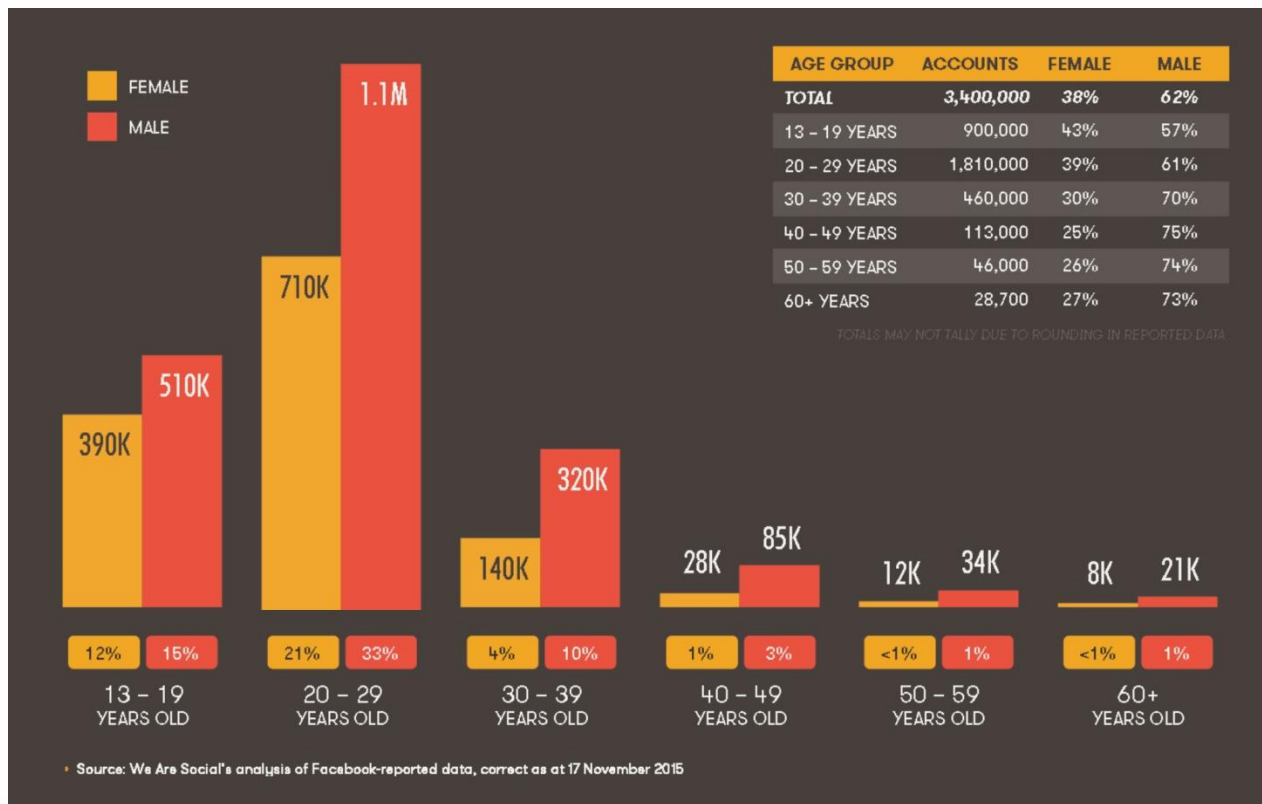


# DIGITAL IN CAMBODIA



- Source: We are social's analysis of Facebook report data 2016

# FACEBOOK IN CAMBODIA (JAN 2016)



THANK  
YOU