

The Social Media Millennial

Social media usage in Cambodia



*A collaborative research project completed by
MRTS Consulting in Cambodia and Stereoscope Ltd in the UK*



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Introduction

A year unlike others

This market research report looks at how Cambodian consumers aged 18 - 39 use social media in Cambodia. It is based on a collaborative market research project completed by MRTS Consulting in Cambodia and Stereoscope Ltd in the UK.

- MRTS Consulting scripted and implemented an online survey distributed to its online research panel in Cambodia and completed all data coding.
- Stereoscope completed the survey data analysis, examination of usage personas, and compilation of the report.

Methodology note

An online survey was designed, comprising of around 7 core questions, plus a series of standard demographics questions. Thought was given to ease of response and speed of completion so as to maximise completed responses including on mobile.

The survey was implemented using MRTS Consulting's proprietary online consumer panel. A total of 400 respondents completed the entire set of questions, allowing deeper analysis by demographics as well as examination of the data in terms of online behaviour personas.

Responses were gathered over a 3 week period during November 2020 across a range of age categories, geographic locations (Phnom Penh and provinces) as well as gender, income group and education level. All responses were anonymised. The survey sought to examine four core question areas.

Q: What social media platforms are favoured by Cambodian Millennials?

Q: What are the patterns of social media usage?

Q: What are the drivers of social media usage?

Q: What social media usage personas can be characterised, such as city dwellers, or 'always-on' users.

Summary data tables were compiled with demographic cross tabulations. Quantitative analysis was completed on the sample as a whole, and by demographics. Additional cross-tabulations generated a view by social media personas.

Consumers and COVID-19 in Cambodia

Large scale interventions by the Government were announced on 16th March 2020, including the closure of all education facilities nationwide, with distance learning measures instituted. A plan was in place to commence reopening of schools in a controlled manner for August.

Some entertainment venues (clubs and karaoke bars) were closed on March 17th, but allowed to re-open in early July subject to adopting relevant COVID controls and receiving a permit.

There have been limitations on mass gathering, and people advised generally to stay at home as much as possible.

Given that 2020 has been a very different year, it is likely that levels of internet and social media usage in 2020 are also different to the preceding 'norm'.

The Battle for Social Media Users

There are many social media platforms to choose to use, and new platforms with a specific focus appearing regularly. Our first set of questions therefore looked at what platforms are actually used by Cambodian Millennials.

Platforms in Use

Our survey asked respondents about their usage of 12 common social media platforms.

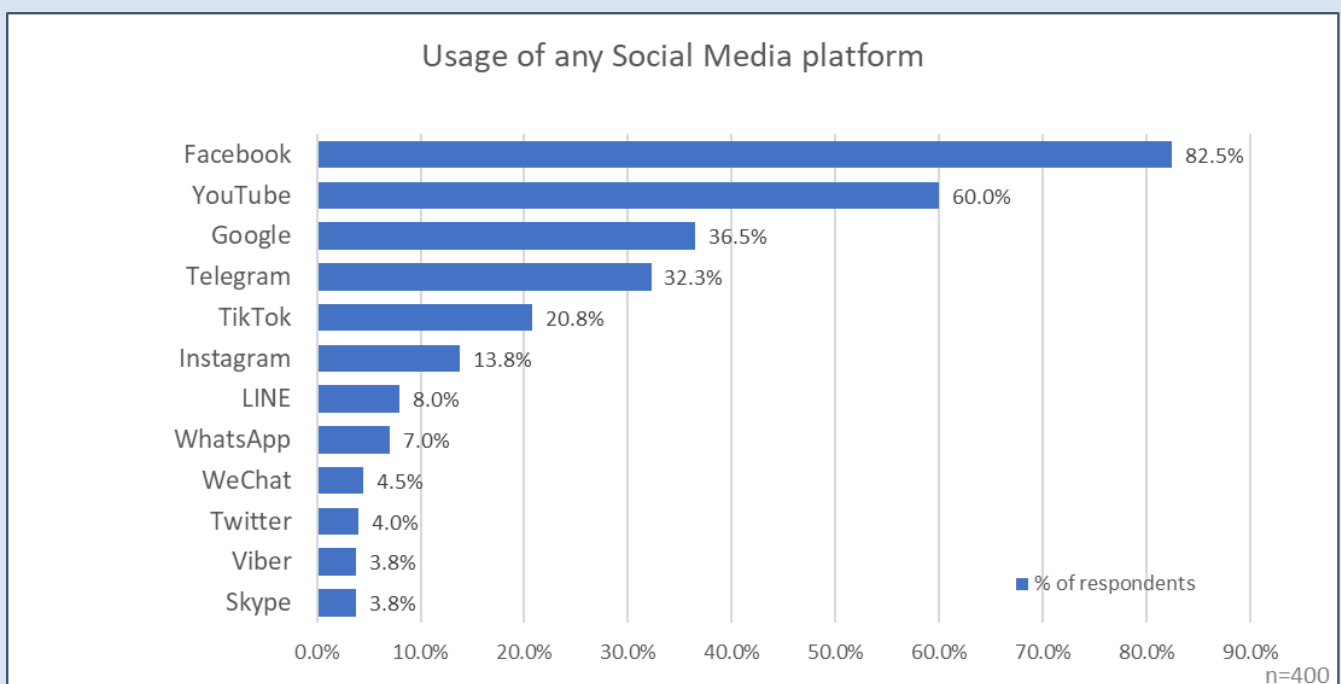


FIG. 1 USAGE OF ANY SOCIAL MEDIA PLATFORM

Typical respondents regularly use a rich variety of platforms, though across the research Facebook is used by the vast majority.

People use social media platforms for many different aims and Millennials end up using a wide variety of platforms – reflecting their diverse uses of social media.

- Facebook and YouTube are the leading platforms, with 83% and 60% respectively of all our respondents using them. Google (used by 36% of respondents as a social media platform) can be thought of as ‘multi-purpose’ platforms for information and content as well as search and interaction.

- Telegram, used for instant messaging, VOIP calling and content sharing, was the 4th most popular platform researched in our survey (used by 32% of our respondents).
- TikTok and Instagram also command a significant level of usage

Other messaging platforms such as LINE, WhatsApp and WeChat show much lower usage penetration in our research sample.

Urban vs Provinces platform use

Urban millennials have a wider general usage of social media platforms compared to those in the provinces as can be seen in Figure 2 which highlights the top 6 platforms.

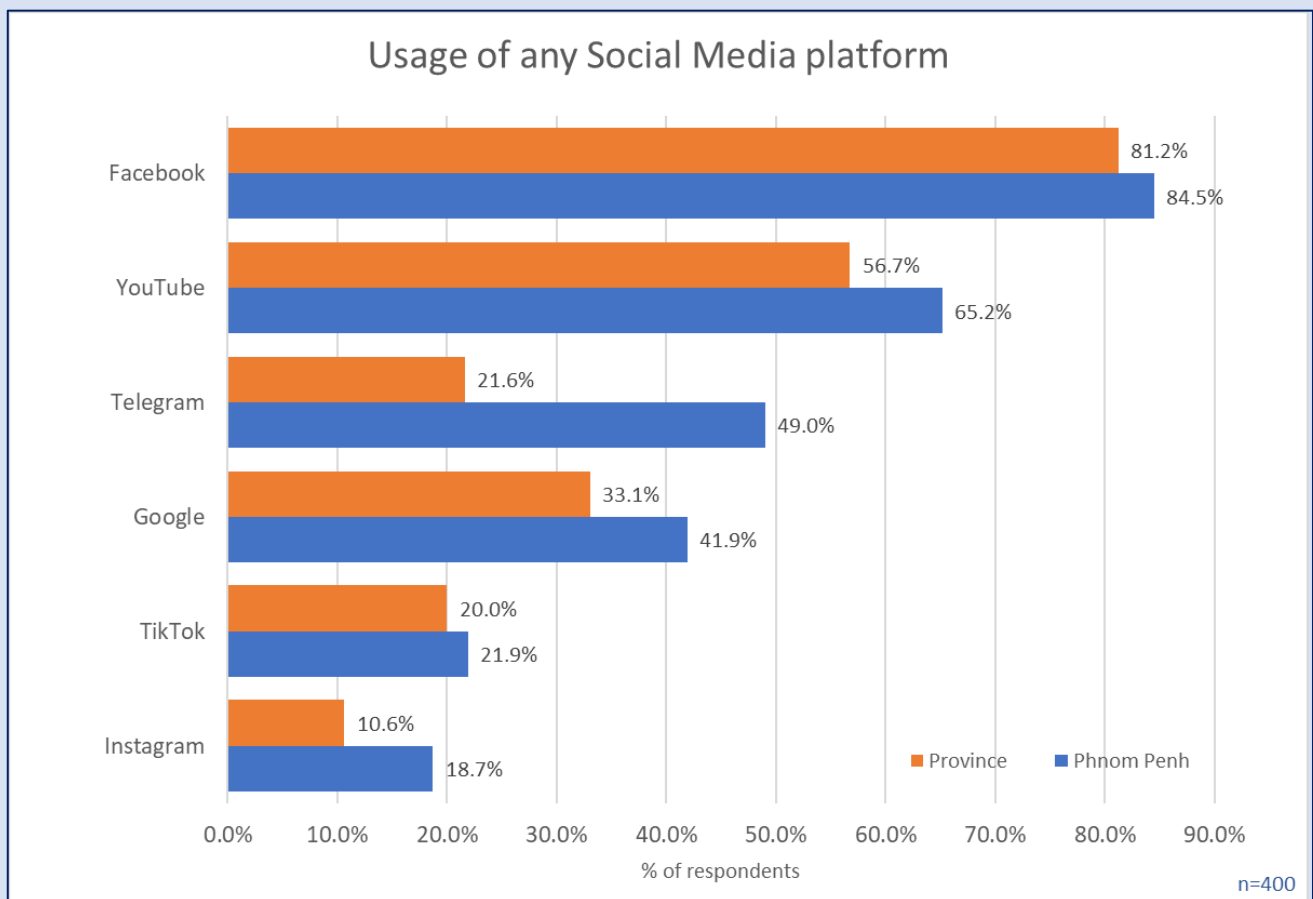


FIG. 2 USAGE OF ANY SOCIAL MEDIA PLATFORM (TOP 6 PLATFORMS) – URBAN AND PROVINCIAL

We can see that Facebook and YouTube remain the top platforms, however there are also a few notable differences amongst the remaining platforms:

- Amongst the top six platforms, usage of Telegram is heavily biased to urban users.

- In the provinces, Telegram becomes the 4th most used platform with Google rising to 3rd place.

Amongst the lower usage platforms, LINE, WhatsApp, Skype and WeChat are heavily biased to urban users.

Age differences in platform use

If we analyse social media platform use by age group, we start to see some interesting differences emerge. Figure 3 shows the top six platforms in order of usage by over 35 age group.

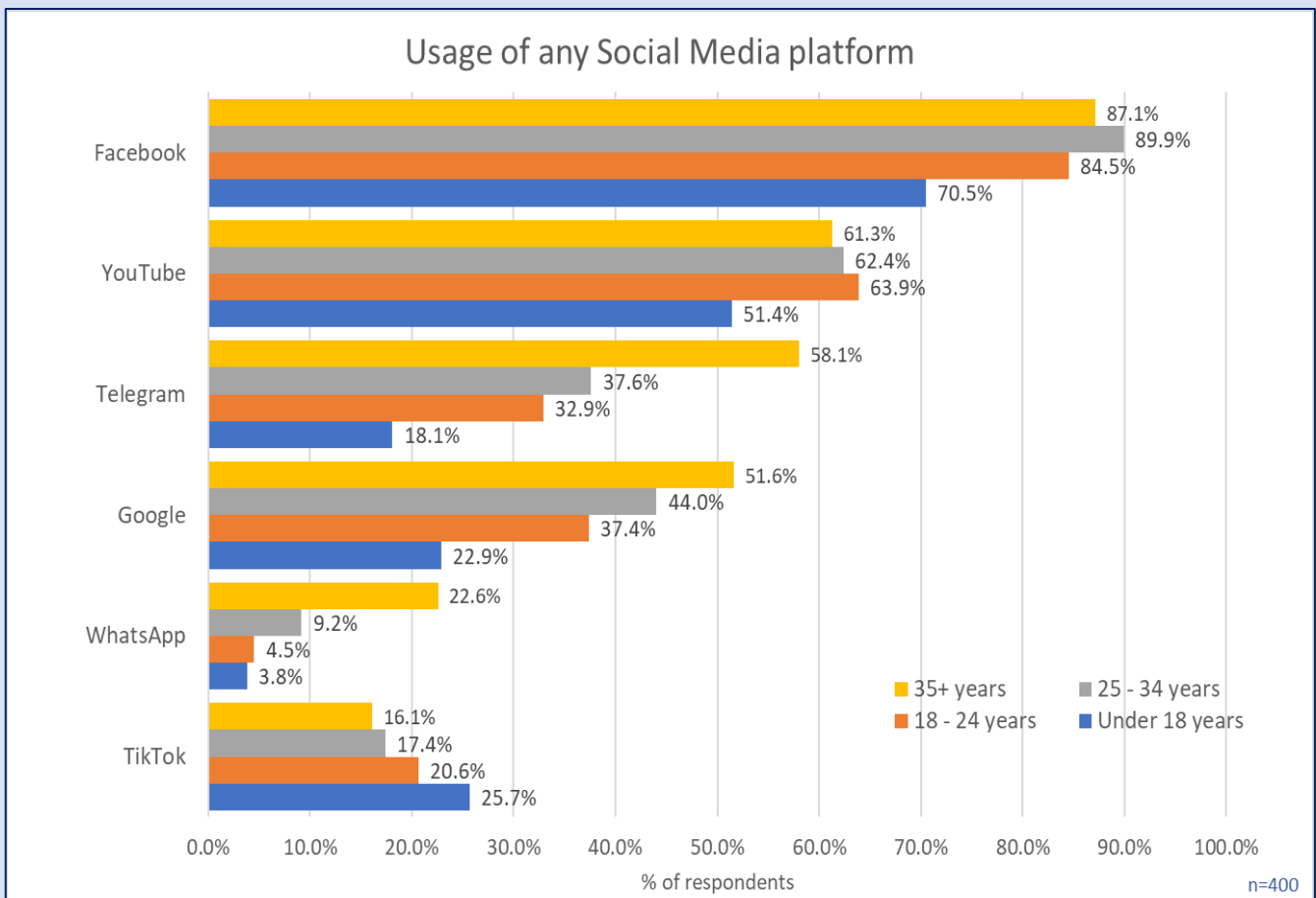


FIG. 3 USAGE OF ANY SOCIAL MEDIA PLATFORM (TOP 6 PLATFORMS) – AGE GROUP

Generally we can see that while older age groups use a wide set of platforms, younger age groups especially the under 18s would seem to have a much narrower spread of usage.

Under 18 years

The under 18 years respondents are the lowest users of all these top platforms compared to other age groups, with the exception of TikTok where it is the leading age group.

This age group shows notably low usage of Telegram and Google compared to say the 35+ year age group.

18 – 24 years

This age group is close to the norm for usage of Facebook and YouTube (they are, just, the highest users of YouTube of any of these age groups), but follows the under 18s in other respects.

Within the lower usage platforms, this age group is the heaviest user of Instagram at 17%

25 – 34 years

This age group follows the trends seen in the 18 – 24 age group. They are (just) the heaviest users of Facebook.

Within the lower usage platforms, LINE starts to make an appearance with 13% of this age group using.

35+ years

This older age group are prolific users of a wide range of platforms. They are by far the heaviest users of Telegram, Google, and WhatsApp.

Within the lower usage platforms, they are the heaviest users of WeChat (16%) and have comparable usage of LINE (13%) at the 25-34 year age group.

User gender differences in platform use

In terms of demographics we can also analyse platform usage by user gender as shown in Figure 4 which shows the top 6 platforms (in order of usage by female users).

We can see some clear differences in platform usage.

- Male users are slightly heavier users of Facebook and YouTube, as well as of TikTok. Amongst male users, Google comes 3rd in terms of platform usage. And Instagram is the lowest used of these six platforms.
- Female users are heavier users of Telegram and Instagram.

Within the lower usage platforms, it is also notable that some 13% of female users also use WhatsApp (compared to just 6% of male users).

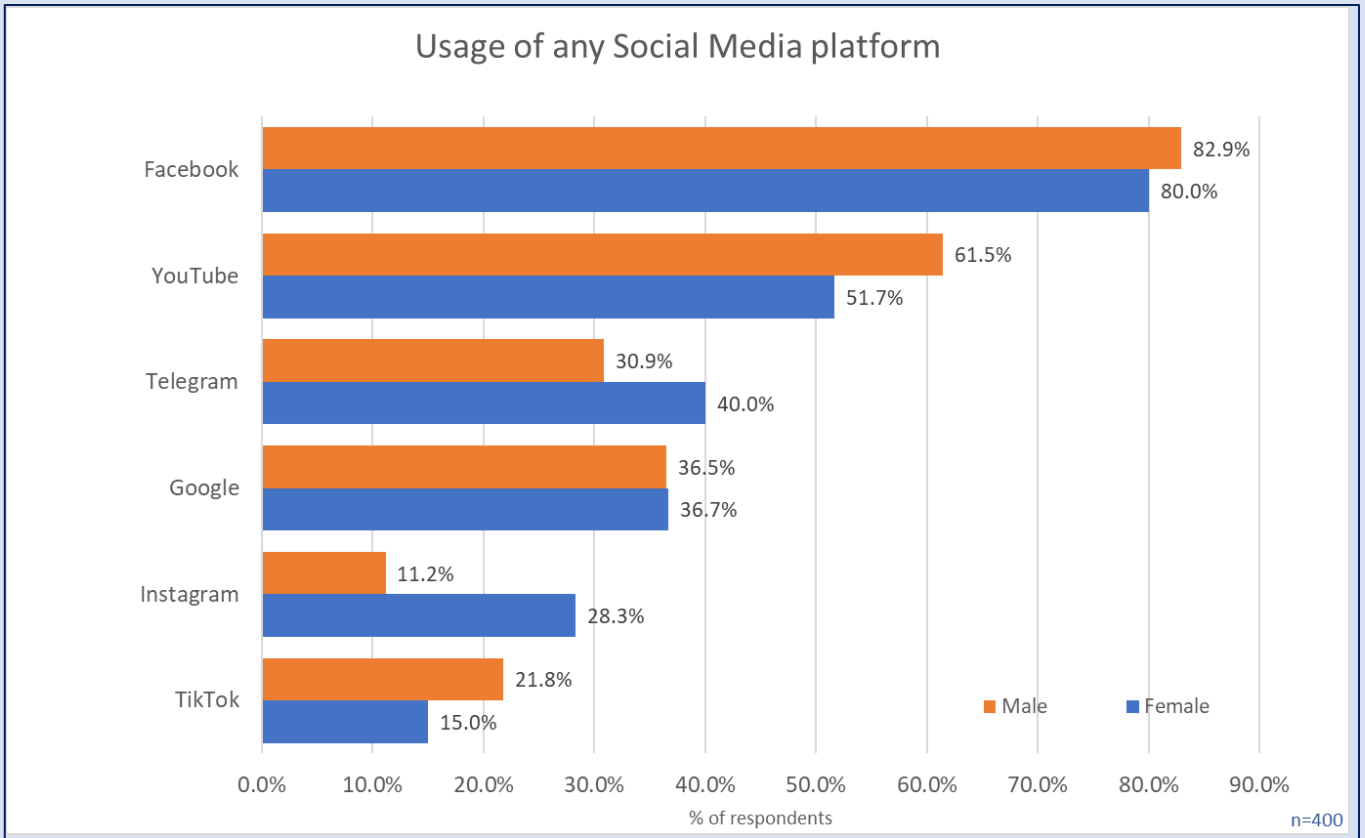


FIG. 4 USAGE OF ANY SOCIAL MEDIA PLATFORM (TOP 6 PLATFORMS) – USER GENDER

Annex 2: MRTS and Stereoscope

MRTS Consulting

MRTS Consulting Ltd (MRTS) is a professional market research and strategy consulting company headquartered in Cambodia. Our founder has over 15 years of experience in market research in Cambodia and strong knowledge of local markets which can help our clients with insights, trends and winning strategies for growth—whether you need to understand market dynamics, identify new opportunities, or increase your profitability.

We use cutting edge technology for our market research projects to ensure accuracy and reliability of data collection, and our highly experienced and trained team help find deep insights to help you improve your business.

MRTS is the first and only company in Cambodia that runs Online Panel for Market Research in Cambodia. We developed our platform with Double Opt-in Verification and members are recruited from different channels to ensure good representation. We provide our clients with a cost saving and speed solution for data collection from Cambodia market.

MRTS Consulting Ltd.

- Address: #68&69, St. Betong, Oubek Kaorm, Khan Sen Sok, Phnom Penh, Cambodia
- Mobile: 012 610 677 / 010 25 6666
- Email: vuthy@mrtsconsulting.com
- Website: www.mrtsconsulting.com

Stereoscope Ltd

Stereoscope Ltd was founded in 2019 in the UK by Phil Todd to provide outstanding independent market research, market strategy, operations support, and market consulting. We work broadly in the vertical markets of communications, telecoms, media, and digital technology.

Stereoscope supports clients' tactical and strategic market strategy with design and implementation of market research, support of inhouse research teams, as well as operational and interim support.

Previously Phil was Managing VP for IoT Markets with Gartner, and Global Director of Client Research at The Economist Intelligence Unit. He has worked widely across the technology sector, as well as in publishing, macro-economics and country analysis, and finance sectors.

Stereoscope Ltd

- Email: phil.todd@stereoscope-research.com
- Website: www.stereoscope-research.com