

MEDIA HABITS AND INFORMATION SOURCES OF YOUTH IN CAMBODIA



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Resilient nations.*



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FOREWORD

Cambodia has the youngest population in Southeast Asia, with up to 30 percent of its 14.7 million people being between 15 and 30 years of age. Many in this young population group, just a few years ago, were found to have little awareness about participation in civic life to address issues concerning them and their community.

That has begun to change, however. Youth have demonstrated greater interest to actively contribute to civic life as well as to promoting a prosperous and equitable future for their country thanks to initiatives such as Loy 9, the multi-media programme on youth civic participation in Cambodia.

The latest study about Knowledge, Attitudes and Practices (KAP) to measure impacts of the Loy 9 programme has found that most youth in Cambodia are positive about their capacity to participate in civic life. Ninety percent agree they feel brave enough to say what they think and take action in their community. Similarly, 92 per cent agree they feel confident they could get permission from older people in their family to participate in their community. But youth exposed to Loy 9 were more positive about the idea of young people participating in decision-making within their local community. More youth exposed to Loy9 compared to those unexposed agreed that young people should be involved in decision making at the village and commune level (89 percent vs. 84 percent) and young people should become more involved in their commune councils (91 percent vs. 87 percent).

Using multi-media platforms including TV series, radio call-in show, live activity and social media channel, Loy 9 has been successful in reaching out to more than 2 million young people since it was launched in January 2011. The audience has learned about the importance of getting involved in civic life through activities such as sport, arts and culture, public speaking, and voting in local and national elections.

With the support of Sweden and in close partnership with BBC Media Action, in August 2013 the second wave of this KAP study on youth civic participation in Cambodia was launched. The results are encouraging although a lot remains to be done to enhance the experience and aspiration of the young people in Cambodia. They are a dynamic and promising economic, social and cultural force. They also represent Cambodia's biggest asset for boosting sustainable economic growth, human development and governance.

It is for these reasons that youth-related issues form a major focus of UNDP's work in Cambodia, in collaboration with other UN agencies and youth organizations through their participation in the Loy 9 Campaign Working Group. The aim is to promote a sustainable human capital starting with youth who offer new perspectives, aspirations and ideas about the future.

The KAP Study 2 and its findings are very useful to guide future endeavors by the UN and all stakeholders to engage and empower youth to take greater part in civic life and make a contribution to building a flourishing and equitable society for all Cambodians.

Ms. Claire Van der Vaeren
UN Resident Coordinator

1 EXECUTIVE SUMMARY

THE PROJECT

The Multimedia Initiative for Youth Civic Education in Cambodia is a governance project funded by the United Nations Development Programme (UNDP) as part of its Strengthening Democracy Programme. Renamed to the public as 'Loy9', since September 2010, BBC Media Action in Cambodia has been funded by UNDP to reach young people aged 15-24 with key information about democratic institutions and civic participation through this multimedia intervention of TV, radio, online and mobile content and live events. In 2012, UNDP also submitted to the Swedish International Development Co-operation Agency (SIDA) a concept note for the extension of the Multimedia Initiative until the end of 2013. As a result, SIDA have also contributed significantly to further funding for Loy9 in 2013.

The weekly radio phone-in show is broadcast throughout the year and two series of a combined TV drama and magazine show first ran from January 2012 to May 2012, while the second series was aired between March 2013 and June 2013. When on air, the TV show is broadcast every week and is repeated at least once. Both the TV and radio shows are broadcast across most of the country on privately owned partner TV channels and radio stations. In addition to its broadcast programming, Loy9 has its own website as well as other social network pages.¹

This multimedia project aims to reach young people in Cambodia in order to improve civic knowledge and encourage youth to engage in civic participation. Key programme objectives include improving knowledge and awareness of opportunities for civic participation, gender equality and the skills required for the empowerment of youth. In the run up to the 2013 election, a number of TV and radio Public Service Announcements ('spots') were also produced as part of the project to provide key information to the youth target audience to inform them about the voting process.

RESEARCH APPROACH

In order to measure current levels civic attitudes, knowledge and engagement, assess the impact of Loy9 and capture a snapshot of the ways in which youth in Cambodia engage with a range of media, BBC Media Action commissioned a Knowledge Attitudes and Practice (KAP) quantitative survey. To reflect the Loy9 target audience, the KAP survey used a nationally representative sample of 2,597 youth aged 15–24 drawn from all 24 provinces in Cambodia, with face-to-face interviews conducted in August 2013. This report is one of two to be produced from this research and focuses on the ways in which **youth in Cambodia use different types of media**. The second report concentrates instead on the attitudes of youth in Cambodia towards a range of civic engagement issues and the level of their exposure to Loy9.

¹ Loy9 TV Series 1 was broadcast from 15/1/2012 – 17/5/2013 first on CTN with repeats on MyTV two days later; Loy9 TV series 2 was broadcast from 7/3/2013 – 28/6/2013 first on MyTV with repeats two days later on CTN and CNC. Both series were then re-broadcast several months after the original broadcast period by MyTV.

KEY FINDINGS

Access to traditional forms of media is widespread

- The majority of young people in Cambodia have access to TV (92%) or radio (92%). Although levels of access to TV and radio are the same, the frequency of use differs substantially. The TV audience is much more likely to be watching daily (70%) compared to the radio audience (54%).
- The peak viewing times for TV among young people is in the evening between 6pm and 10pm, though female youth are more likely to be watching during this time than male youth. Urban youth are more likely than their rural counterparts to watch TV at almost all times of the day. The three most watched TV stations are CTN (73%), MyTV (66%) and Bayon TV (38%).
- In contrast, the most popular time for young people to listen to the radio is in the morning between 6am and 8am (43%), followed by lunchtime (33% 12pm until 2pm) and in the evening (35% 8pm to 10pm). Young women are more likely to listen to the radio around lunchtime and during the day, while young men are more likely to listen in the evenings after 8pm.

Mobile phone access is near universal for young people

- Although overall access to mobile phones (96%) is even greater than access to TV or radio, daily access is more limited than to the traditional forms of media (66%).
- Despite frequent use of mobile phones, young people are not using their mobile phone extensively each day. Forty-three per cent of youth with access to a mobile phone report using it for less than 10 minutes a day. Less than a quarter (23%) report using a mobile phone for more than 30 minutes a day.

- Metfone is the mobile phone network with the most youth subscribers in Cambodia (68%), followed by Smart Mobile (41%), though this varies by location - rural youth are much more likely to use Metfone and much less likely to use Smartphone than urban youth.
- Nearly one-third of youth (29%) use more than one mobile phone network.
- A high proportion of young people who have access to a mobile phone use it to access radio (43%), this is the second most common use of mobile phone after making and receiving calls (98%).

Internet: an urban market dominates

- One-third of youth in Cambodia has access to the internet (34%), though this is mostly among youth resident in urban areas (65% of youth in urban areas report internet access). News and social networks are the most common reasons young people use the internet (73% and 63% respectively).
- In contrast to mobile phone daily use, daily internet use among those with access is often for significant periods of time (49% of internet users say that they use the internet for more than 30 minutes a day).

Media is a key and trusted information source

- Media is a trusted source of information regarding civic engagement issues, and a common source for reported awareness of opportunities for participation. Nearly two-thirds of youth (65%) report TV as a source of information about civic engagement issues and current affairs, and a similar proportion (64%) report radio as a source

of this information.

- Media is also a key information source regarding voting (after senior family members), and its influence is recognized by youth with the majority (83%) reporting that it has at least a small amount of influence on their decision about who to vote for.
- Social contacts such as family members, local village elders and government officials are key trusted sources of information for young people as the high trust in these groups of people remains consistent across all youth – regardless of whether they are media consumers or media dark.²

Media has an impact on civic participation and attitudes

- There is a positive association between media consumption, higher levels of civic knowledge and increased interest in civic engagement; this suggests that media can continue to support and reinforce these trends.
- Awareness of civic engagement terms is higher among youth media consumers than media-dark youth, and they are more likely to have heard of the National Assembly (80% vs. 39%), commune councils (89% vs. 61%) and democracy (75% vs. 33%). This pattern continues to be seen when moving from awareness to reported knowledge, and youth media consumers are almost twice as likely as media-dark youth to say that they know what each of these terms means.

- Voting and electoral participation are key civic participation indicators and, behind high overall levels of participation, there are also key differences between youth who consume media and those who do not. Youth media consumers are more likely than media-dark youth to report that they voted in the 2013 National Assembly election (67% vs. 56%), and that they are very likely to vote in a future National Assembly election (70% vs. 50%). This in part reflects a difference in perceptions of electoral freedom; youth media consumers are more likely to feel that youth in Cambodia are very free to choose who to vote for without feeling pressured (60% vs. 39%).

- These differences in both attitudes to civic participation and participation in practice between youth media consumers and media-dark youth can also be seen in more day-to-day measures of civic participation. Overall, nearly nine in ten (89%) young people report they had heard about opportunities for participation in their community, however just eight in ten media-dark youth (82%) report hearing about such opportunities.

- Behind the differences outlined in these measures of civic awareness and participation are key differences in the attitudes and perceptions of youth with and without media access. For example, media-dark youth are more likely to report that they do not have the courage to speak out when older family members expect them to follow their views (61% vs. 43% of youth media consumers) and are less likely to report that they are brave enough to say what they think and take action in their community (84% vs. 91%).

² Young people are considered to be media consumers throughout the remainder of this report if they reported having access to TV, radio or the internet at least once a month. Young people termed 'media dark' could have some access to media, but because this access is not at a basic frequent level (i.e. at least monthly) they are not categorised as media consumers for our purposes.

2 GLOSSARY OF KEY TERMS AND ABBREVIATIONS

Term	Definition
Base-size	The number of respondents on which percentages are based
Demographic	A section of the population that share common characteristics
KAP	An abbreviation of knowledge, attitudes and practices
Linear relationship	Two variables that increase or decrease proportionately to each other
Media access	Reporting access to either a TV, radio or the internet either personally, in the household, neighbourhood or elsewhere
Media consumers	Youth who report access to either a TV, radio or the internet at least once a month
Media dark	Youth who report no access to either a TV, radio or the internet at least once a month
NGO	An abbreviation of non-governmental organisation
Outputs	The products that result from an organisation's or project's activities
Population	The total number of people that live in a specified area
Youth	Young Cambodians aged 15-24

3 INTRODUCTION

3.1 THE PROJECT

The population of Cambodia is the youngest in South East Asia, however young people have previously been found to have limited awareness of and engagement in civil society and politics. Research among youth in Cambodia in 2010 highlighted these issues, finding that more than 20% of young people in Cambodia were not aware of the National Assembly, and even among those who had heard of this important institution, more than 60% did not know what it was.³

The Multimedia Initiative for Youth Civic Education in Cambodia is a governance project funded by the United Nations Development Programme (UNDP) as part of its Strengthening Democracy Programme. Renamed to the public as 'Loy9', since September 2010, BBC Media Action in Cambodia has been funded by UNDP to reach young people aged 15-24 with key information about democratic institutions and civic participation through this multimedia intervention of TV, radio, online and mobile content and live events. In 2012, UNDP also submitted to the Swedish International Development Co-operation Agency (SIDA) a concept note for the extension of the Multimedia Initiative until the end of 2013. As a result, SIDA have also contributed significantly to further funding for Loy9 in 2013.

The weekly radio phone-in show is broadcast throughout the year and two series of a combined TV drama and magazine show first ran from January to May 2012, while the second series was aired between March and June 2013. When on air, the TV show is broadcast every week and is repeated at least once. Both the TV and radio shows are broadcast across most of the

country on privately owned partner TV channels and radio stations. In addition to its broadcast programming, Loy9 has its own website as well as other social network pages.⁴

Key programme areas include improving knowledge and awareness of opportunities for civic participation, gender equality and the skills required for the empowerment of youth. In the run-up to the 2013 election, BBC Media Action also produced a number of TV and radio Public Service Announcements (PSAs or 'spots') to provide key information to the youth target audience to inform them about the voting process.

3.2 PURPOSE OF THIS STUDY

BBC Media Action commissioned a Knowledge Attitudes and Practice (KAP) quantitative survey among young people aged 15-24 in Cambodia to understand the reach and impact of the Loy9 project⁵ and, in addition, collected extensive data on media consumption habits and information sources among this group.

This report provides data on:

- The type of media used by youth in Cambodia
- The frequency of access and for what purpose,
- The trusted sources of information for youth in Cambodia on issues of civic participation.

Throughout all three areas of interest and where differences are statistically significant, this report draws out any differences in findings between key subgroups (particularly by sex, age and location).

3 BBC World Service Trust (2010) Youth Civic Participation in Cambodia: Knowledge, Attitudes, Practices, and Media.

4 Loy9 TV series 1 was broadcast from 15 January to 17 May 2012, first on CTN with repeats on MyTV two days later; Loy9 TV series 2 was broadcast from 7 March to 28 June 2013, first on MyTV with repeats two days later on CTN and CNC. Both series were then re-broadcast several months after the original broadcast period by MyTV.

5 Findings on the reach and impact of the Loy9 project are reported in the other report produced from this research: Loy9: Reaching and Engaging the Youth Audience Across Cambodia (BBC Media Action, 2014).

To ensure robust results, the KAP survey used a nationally representative sample of 2,597 youth aged 15–24 drawn from all 24 provinces in Cambodia, with interviews conducted between 14 and 28 August 2013. BBC Media Action commissioned a Cambodian fieldwork agency (the Centre for Advanced Study) to administer the face-to-face surveys, using trained interviewers who were fully briefed by the agency and BBC Media Action prior to fieldwork. National data is presented with $\pm 3\%$ margin of error and, unless otherwise reported, the base is 2,597 young people aged 15–24 who are normally resident in Cambodia. Any differences in findings between subgroups discussed in this report are statistically significant.⁶

Table 1: Demographics of achieved sample for the KAP survey

	%	Base
Age		
15-19 years	56	1,449
20-24 years	44	1,148
Sex		
Male	50	1,295
Female	50	1,302
Urban/rural location		
Urban	20	520
Rural	80	2,077
Education		
No school	2	43
Primary	28	727
Secondary	40	1,043
High school	26	676
Vocational	1	14
University	4	93
Income		
Lowest	20	510
Lower-middle	20	507
Middle	20	519
Higher-middle	20	518
Highest	19	496
Total base		2,597



⁶ As with most research of this nature, it is not possible to attribute causality on the basis of correlation. This report contains findings primarily based on bivariate analysis (comparing the relationship between two variables) to investigate how responses to questions varied by certain demographics. Although this analysis can show which subgroups are more likely than another to have given a particular answer, it is not sufficient to establish the cause of this association.

4 HOW DO YOUNG CAMBODIANS ACCESS AND USE MEDIA?

KEY FINDINGS

- Overall, youth in Cambodia have high levels of access to a range of media, and usually multiple types. The majority of youth (54%) have access to both TV and radio at least once a month.
- CTN and MyTV are the most popular channels among youth in Cambodia and ABC Kampuchea is the most popular radio station.
- Although all youth are likely to watch TV in the evening, for radio, the preferred listening times differ by gender, with female youth more likely to listen at lunchtime and male youth more likely to listen in the evening.
- Almost all youth (96%) in Cambodia have access to mobile phone.
- Daily mobile phone use among those with access is often fairly limited (43% of mobile users use a phone for less than 10 minutes a day).
- Metfone is the mobile phone network with the most youth subscribers in Cambodia, followed by Smart Mobile, though this varies by key demographics. For example, rural youth are much more likely to use Metphone and much less likely to use Smartphone than urban youth. Nearly one-third of youth use more than one mobile phone network.
- A third of youth in Cambodia has access to the internet, though this is mostly among youth resident in urban areas. News and social networks are the most common reasons young people use the internet.
- Daily internet use among those with access is often for significant periods of time (49% of internet users say that they use the internet for more than 30 minutes a day).

4.1 OVERALL MEDIA ACCESS PATTERNS

Table 2: Media access patterns among youth in Cambodia

Base: all respondents (2,597)

	Overall	Daily use
TV	92%	70%
Radio	92%	54%
Internet	34%	40%
Mobile phone	96%	66%

Q: Which of the following items do you own yourself, access in your house or access in your neighbourhood?
Q: How frequently do you access the following media?

Overall youth in Cambodia have very high levels of access to traditional media and to mobile phones (whether personal, in their own home or neighbourhood). Those who have access to these

types of media also use them frequently, with a majority using them at least once a day. Internet use however, has much lower levels of both overall access and daily use compared to traditional media and mobile phones.

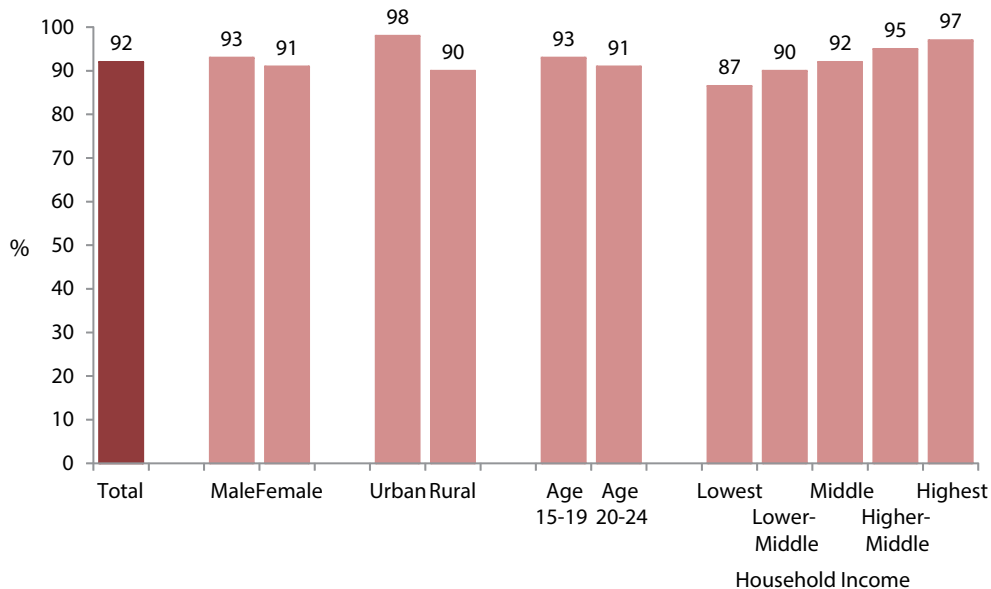
4.2 TELEVISION

There is widespread access to TV among young people in Cambodia

Almost three-quarters (72%) of youth in Cambodia reported access to a TV in their household; **just 8% of youth reported having no access to a TV** whether personally, in their home or neighbourhood.

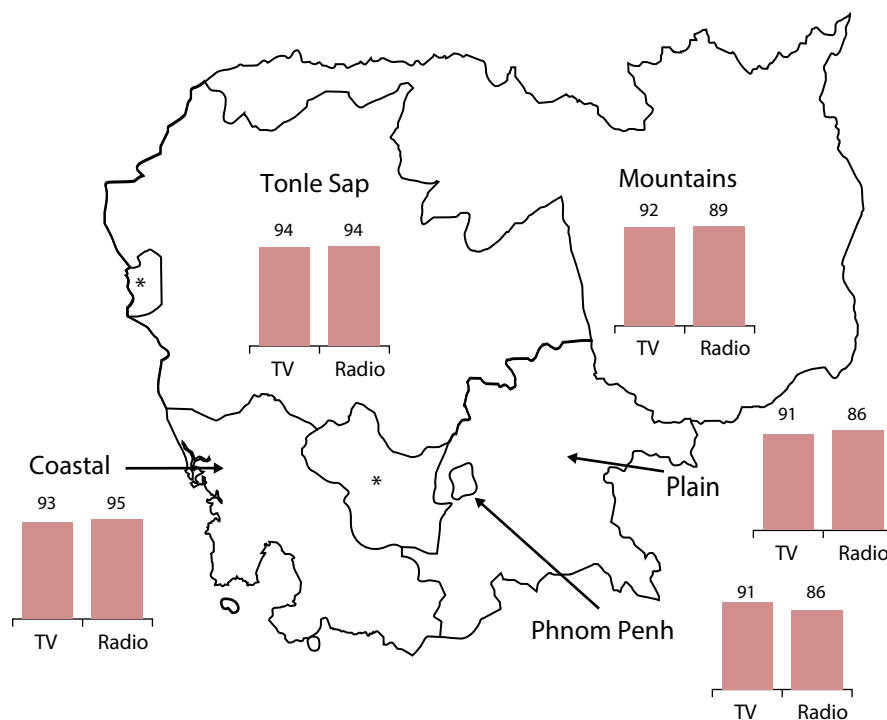
This chapter refers to **media access**, which is defined as ever having access to the media type in question, whether through personal access, or access in the household or neighbourhood more broadly.

Figure 1: Overall access to TV in any location by key demographics



Base: Male (n=1,295); Female (n=1,302); Age 15-19 (n=1,449); Age 20-24 (n=1,148); Urban (n=520); Rural (n=2,077); : Lowest quintile (n=510); Lower middle quintile (n= 507); Middle quintile (n=519); Higher-middle quintile(n=518); Highest quintile (n=496).

Figure 2: TV and radio access by region



Base: Coastal (n=221); Mountain (n=336); Phnom Penh (n=221); Plain (n=1003); Tonle Sap (n=816)

Younger Cambodians (aged 15-19) were more likely to have access to a TV in their own home (75%, compared to 68% of those aged 20-24), however, older youth were more likely to have access to their own personal TV than those in the younger age group (6% of those aged 20-24, compared to 1% of those aged 15-19).

As would be expected due to the geographic coverage of TV broadcasts in Cambodia, urban youth had greater access to TV in their own home (89%) compared to rural youth (67%). Ten per cent of rural youth reported no access to a TV set at all, compared to just 2% of their urban counterparts. Reflecting this distribution, youth in Phnom Penh were much less likely to report no access to television compared to youth in other regions (1% vs. up to 14% in other regions).

Higher levels of household income and education affect access to TV. Just 1% of young people with a university education reported no access to a TV compared to more than one in ten (16%) of those with no or primary only education. Similarly, while 83% of Cambodian youth in the highest income grouping (representing a household income of more than 24 million riel per annum) had a TV in their own home, the same can be said of only 56% of youth in the lowest income grouping (4.1 million riel per annum or less).

Cable and satellite TV: an urban youth market

Overall, **only 9% of young people had cable TV in their own home.** A further 12% could access cable TV in their neighbourhood. Youth in urban areas were far more likely to have access to cable TV in their own home (34%) compared to rural youth (3%). In particular, young people living in the Phnom Penh region had the highest level of access to cable TV in their own homes (43% compared to between 2% and 23% in the other regions). A similar proportion (9%) of young people had access to satellite TV in their own homes, while a quarter (25%) had access in their neighbourhoods.

TV IN CAMBODIA

There are more than 20 TV channels currently broadcasting in Cambodia, many of which broadcast nationally, although this is restricted in some (particularly mountainous) areas by topographical and power restrictions. Most TV channels are privately owned, with only TVK directly owned by the Cambodian government.

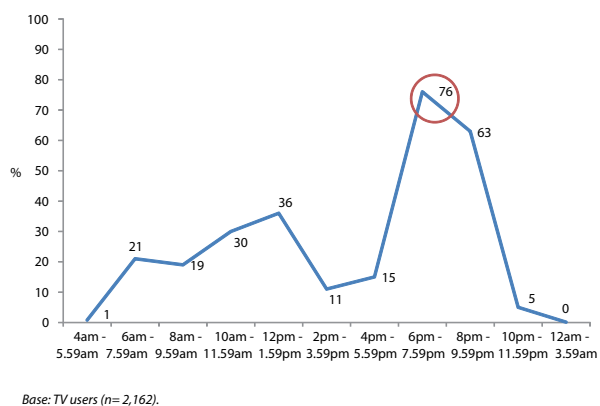
Watching TV is a daily activity for youth in Cambodia

The majority of young people watch TV at least once a day. Among young people who had TV access, 70% said they watched TV every day, a further 16% watched at least once every two or three days and just 8% of youth watched TV less than once a week. Younger youth (aged 15-19), women and youth in urban areas are all more likely than average to watch television every day (73%, 73% and 85% respectively).

Two-thirds of young people (67%) reported watching TV every day of the week, but of those who only watched TV at certain times of the week Saturday, Sunday and Monday were the most common days to watch (16%, 17% and 16% respectively).

The peak time at which youth in Cambodia watch TV is in the evening between 6pm and 10pm. Three-quarters of young people reported watching TV from 6pm to 8pm (76%) and nearly two-thirds (63%) between 8pm and 10pm.

Figure 3: Times youth watch TV



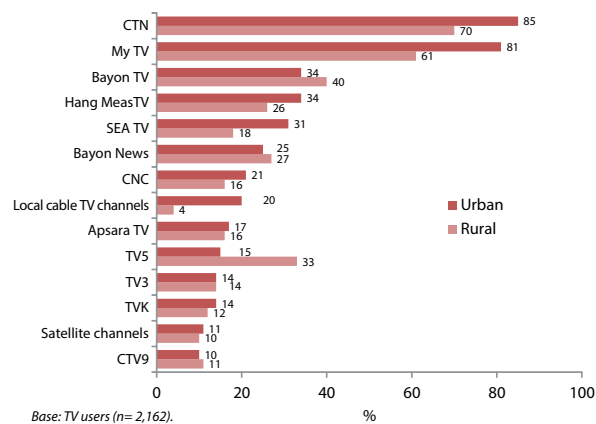
Male youth were more likely to watch TV between 6am and 8am (26% vs. 16% for women), and less likely to watch TV between 8pm and 10pm (58% vs. 68%). Urban youth were more likely than their rural counterparts to watch TV at almost all times of the day.

CTN and MyTV are the most popular TV channels among youth in Cambodia

The three most watched TV stations among young people in Cambodia are CTN (73%), MyTV (66%) and Bayon TV (38%). Preferred stations were similar across age groups and gender, though males are more likely than females to watch CNC (21% vs. 14%) and Bayon News (30% vs. 24%). Most likely reflecting access issues, rural youth were less likely to choose to watch several

of the overall most popular channels compared to urban youth except TV5 (selected by 33% of rural youth compared to 15% of urban).

Figure 4: Most popular TV channel by urban/rural location

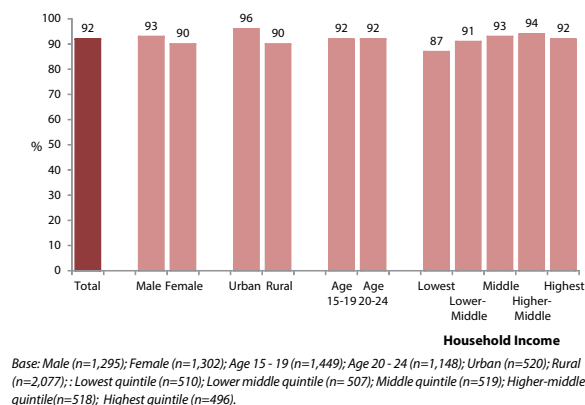


4.3 RADIO

The vast majority of youth in Cambodia have access to the radio.

Nearly four in ten (39%) young people had access to their own personal radio, while two-thirds (67%) had a radio in their own homes. As with TV, just 8% of young people said that they had no access to the radio at all.

Figure 5: Overall access to radio in any location by key demographics



Youth in urban areas were more likely to have access to their own radio (53% vs. 35% of rural youth), though urban and rural youth had similar levels of access to radio in their own homes (74% and 67%) and in their neighbourhood (42% and 41%). There were no significant differences in access to radio by gender; however those aged 20-24 were more likely to have access to their own radio (46% vs. 33% of those aged 15-19). Those in the highest income quintile also had higher levels of access to personal radios (47%) compared to those in the lowest income quintile (28%).

Radio is popular, but is behind TV

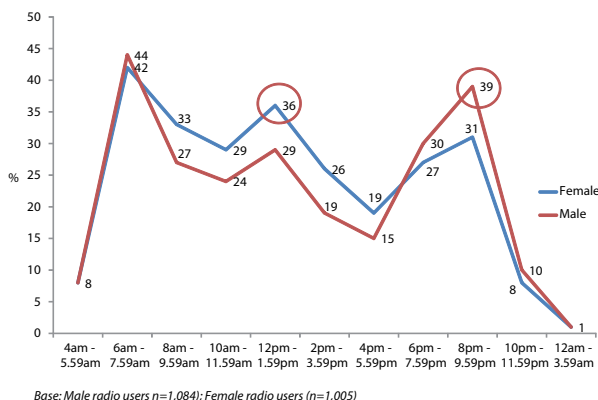
Overall, a similar proportion of young people with access to radio reported listening to it more than once a week as do those with access to TV. The majority (79%) of young people with access to the radio reported listening to it more than once a week. However, this overall figure masks a less frequent engagement with radio compared to TV. Only around half of young people (54%) listened to the radio at least once a day (compared to 70% for TV), with a further quarter (25%) listening at least once every few days.

RADIO IN CAMBODIA

There are more than 42 radio stations currently broadcasting in Cambodia, although reach is restricted in some (particularly mountainous) areas by geographic and power restrictions and the majority of stations broadcast locally only. Most radio stations are privately owned, with only NRC directly owned by the Cambodian government.

The most popular time for young people to listen to the radio is in the morning between 6am and 8am (43%), followed by lunchtime (33% from 12pm until 2pm) and in the evening 8pm to 10pm (35%). Young women were more likely to listen to the radio around lunchtime and during the day, while young men were more likely to listen in the evenings after 8pm.

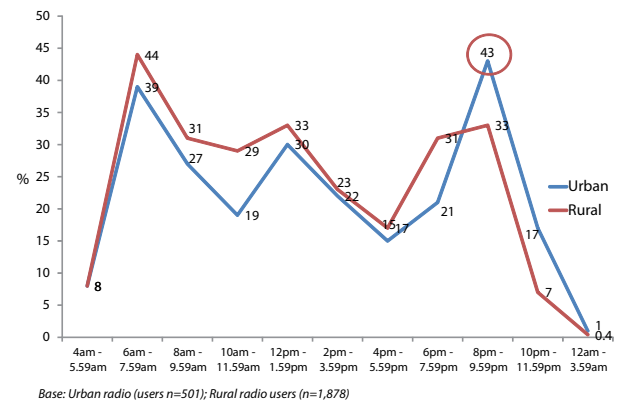
Figure 6: Most popular listening times by gender



Although urban and rural youth were both likely to listen between 6am and 8am (39% and 44% respectively), their evening listening habits varied, with urban youth more likely to listen to the radio later in the evening. Although 31% of young people in rural areas listened to the radio from 6pm to 8pm, only 21% of urban young

people reported listening at this time. Urban youth then listen to the radio in a much greater proportion (43%) later in the evening (8pm to 10pm) compared to just 33% of rural youth.

Figure 7: Most popular listening times by location



ABC Kampuchea is the most popular radio station

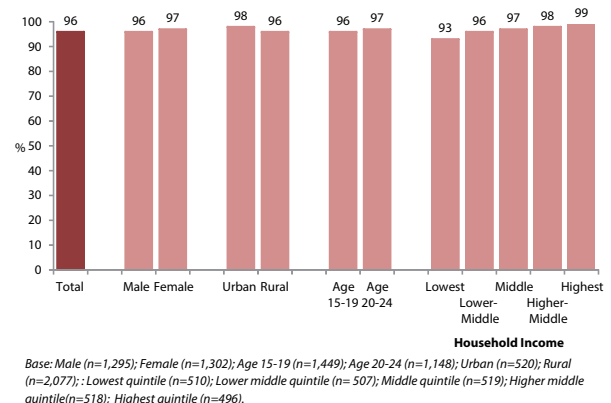
The most popular radio stations Cambodian youth listen to are ABC Kampuchea (19%), Radio Free Asia (15%), FM 105 (11%) and Bayon Radio (10%). Other popular channels included FM 104.5 (9%), WMC Radio (8%) and Sweet FM 103 (7%). However, a relatively high proportion of young people (11%) reported they do not know what radio station they listen to, perhaps suggesting that loyalty to particular stations may not be very high.

4.4 MOBILE PHONES

There is near-universal mobile phone access among youth in Cambodia

Almost all young people in Cambodia have access to a mobile phone; 96% of young people reported access to a personal mobile phone (68%), a mobile in their home (72%) or in their neighbourhood (35%).

Figure 8: Overall access to mobile phones in any location by key demographics



Residents of rural areas were less likely than those in urban areas to have their own mobile phone (65% vs. 76%), though they had more similar levels of access to mobiles in their own homes and neighbourhood. Younger youth (aged 15-19) were also less likely to have their own mobile phone (59%) than those aged 20-24 (78%).

Although access to mobile phones overall was almost universal, access to a personal mobile phone was associated, as might be expected, with both income and education. Almost all youth with a university education had their own mobile phone compared to just six in ten of those with a primary school education (98% vs. 59%). Similarly almost eight in ten (78%) of those in the highest income quintile had their own mobile phone compared to around half (55%) of those in the lowest quintile.

Young people use multiple Sim cards and multiple networks

Metfone is the mobile phone network with the greatest number of subscribers among young people in Cambodia, followed by Smart Mobile. Two-thirds (68%) of young people in Cambodia reported using Metfone, and four in ten (41%) reported using Smart Mobile. Reflecting the fact that it is common in Cambodia for youth to use different SIM cards in their phone, three in ten (29%) young people used more than one mobile phone network.

MOBILE PHONES IN CAMBODIA

There are 19.1 million mobile phone subscribers in Cambodia. This is higher than the population of the country because many people use more than one Sim card or mobile phone. There are three main mobile phone companies which all operate at a national level: Metfone, Cellcard (Mobitel) and Smart Mobile. The cost of calls and SMS varies depending on whether the communication is with someone on the same network but ranges from 5 to 8 cents a minute for calls, and 1 to 5 cents to send an SMS. According to some estimates, there are 1.65 million smartphone users in Cambodia (Khmer First Holdings, 2013).

Rural residents were more likely than urban residents to use Metfone (74% vs. 42%), though they were less likely to use Smart Mobile (34% vs. 66%). Possibly reflecting this popularity among rural youth, Metfone subscribers were also more common among those in the lowest income quintile compared to the highest (76% vs. 56%), while the reverse pattern is evident for Smart Mobile. Three in ten (30%) of those in the lowest income quintile reported using Smart Mobile compared to more than half (54%) of those in the highest.

High access to mobile phones but low daily use

Mobile phone use was frequent among young people in Cambodia with two-thirds (66%) reporting using their mobile at least once a day, while just 9% of those with access to a mobile phone use it less than once a week. Possibly as a result of being more likely to have their own mobile phone rather than just to have access to one in their homes or neighbourhood, youth aged 20-24 were more likely to use a mobile phone at least once a day (74%) than those aged 15-19 (59%). The same pattern was present for those in urban areas (76%) compared to those in rural areas (63%).

Despite frequent use of mobile phones, this does not appear to translate into extensive time spent on mobiles. Four in ten (43%) youth with any access to a mobile phone used it for less than 10 minutes a day. Less than a quarter (23%) used a mobile phone for more than 30 minutes a day. Mobile phone users in urban areas were more likely to use their mobile phone for longer than those in rural areas; almost a third (32%) of urban mobile phone users used their phone for more than half an hour a day compared to a fifth (21%) of rural mobile phone users.

In addition to not spending very long on their mobile phones, youth in Cambodia do not spend large amounts of money on their mobile phone. Half of young people spent \$2 or less a month on their mobile phone use.⁷ As might be expected, youth in the lowest income quintile were more likely to spend less than \$2 a month on their mobile phone (59%) compared to those in the highest income quintile (40%). The same is true of youth in rural areas compared to those in urban areas (50% vs. 38%).

⁷ Mobile phone use was defined as calling, SMS, dialling short codes, online (internet use), subscribing to ring tones and anything else they might use the mobile for.

Youth reported that they used their mobile phones mostly for making and receiving calls (98%), listening to the radio (43%), and sending and receiving messages (32%). This is followed relatively closely by playing and downloading games (27%) and taking photos (22%).

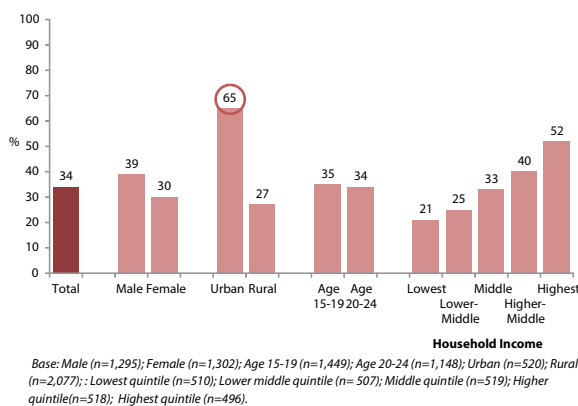
Of those youth who used SMS, the majority used English language messages. Eight in ten (81%) youth who used SMS use English-language messages, compared to almost a third (32%) who used Khmer messages and the 28% who used SMS templates. Youth aged 15-19 (84%), those in urban areas (88%), and those with a high school education (93%) or who were in the highest income quintile (91%) were all more likely to use English-language messages.

4.5 INTERNET

Internet access: a predominantly urban youth market

A third of young people (34%) reported access to the internet. Though there are no significant differences by age group for internet access, young women were more likely not to have internet access compared to young men (70% vs. 61%). As might be expected due to the infrastructure required for internet access, residents in urban areas were more likely than those in rural areas to report access to the internet personally (31% vs. 10%), in their own homes (17% vs. 3%) or in their neighbourhood (31% vs. 9%).

Figure 9: Overall access to internet in any location by key demographics



INTERNET IN CAMBODIA

In Cambodia the internet is available via mobile phone, USB modem, internet cafes, and some workplaces or homes, and is provided by more than 30 companies. The cost of a monthly internet subscription can range from \$15 to \$200, depending on the speed and promotions, while internet cafes tend to charge less than \$1 an hour.

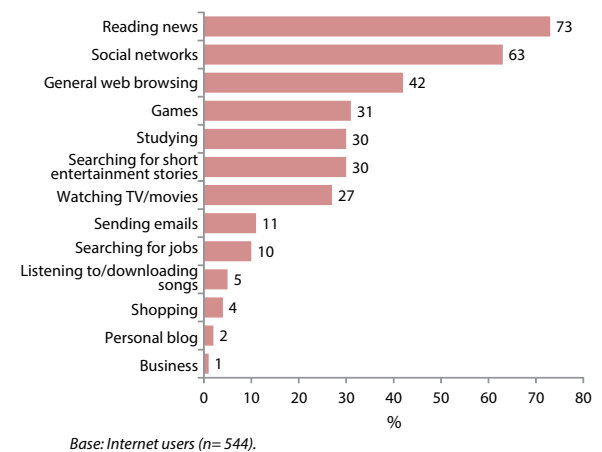
There is frequent and extensive internet use among Cambodian youth with access

The majority of internet users access it frequently. Two-thirds of internet users accessed it either at least once a day (40%) or more than once a week (27%).

Although only a minority of Cambodian youth had access to the internet, those who do are likely to consume it for long periods daily. Almost half (49%) used the internet for more than 30 minutes a day. This is in contrast to the relatively limited use of mobile phones (43% of youth with access to a mobile phone used it for less than 10 minutes a day).

The top three reasons given for using the internet included reading the news (73%), using social networking websites (63%) and general web browsing (42%).⁸

Figure 10: Most popular reasons for using the internet



⁸ This list of potential reasons for using the internet was prompted, with an 'other specify' option also included.

These reasons are reflected in the websites that young people said they most commonly visited. Nearly eight in ten young people with internet access (79%) visited Facebook at least once a month, followed by YouTube (63%). These two websites were by far the most popular websites reported with no other site receiving mentions from more than 15% of young people with internet access.

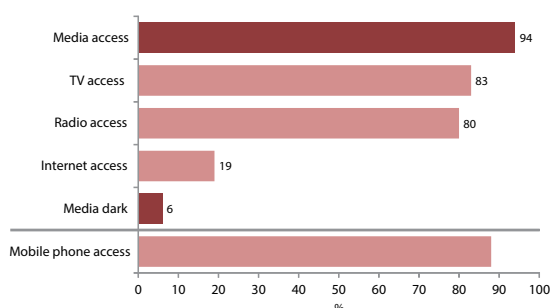
4.6 TYPES OF MEDIA ACCESSED AT LEAST ONCE A MONTH

Turning to look at monthly media access, overall, youth in Cambodia report high levels of monthly access to a range of media, particularly TV and mobile phones. **Just 6% of young people are 'media dark', meaning that they do not access TV, radio or the internet at least once a month.**⁹

Young people are considered to be **media consumers** throughout the remainder of this report if they reported having access to either TV, radio or the internet **at least once a month**. Young people termed **'media dark'** could have some access to media, but because this access is not at a basic frequent level (i.e. at least monthly) they are not categorised as media consumers for our purposes.

Access to and use of mobile phones is even more common than use of traditional media or the internet; nearly nine in ten youth in Cambodia (88%) reported using a mobile phone at least once a month. **Even 63% of the small number of otherwise media-dark youth reported accessing a mobile phone at least once a month.**

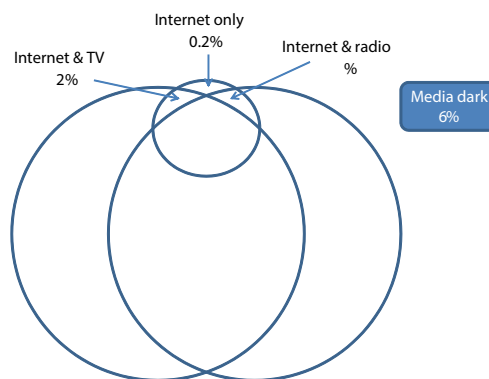
Figure 11: Media consumers



NB Media consumers defined as access to TV, radio or internet at least once a month
Base: All respondents (n= 2,597).
Q: Which of the following items do you own yourself, access in your house or access in your neighbourhood?
Q: When did you last use media?

Overall, only 17% of young people access TV, radio and the internet at least once a month, though just over half of young people have monthly access to both TV and radio (54%).

Figure 12: Media access of youth in Cambodia



Base: All respondents (n= 2,597).
NB. Circle size is not exactly proportionate to the size of the audience segment

As might be expected, young people who fall into the media-dark segment are more likely to be residents of rural areas (93% vs. 79% of those with media access), female (63% vs. 51%), never to have attended school or attended primary school only (62% vs. 27%), and to fall into the lowest household income quintile (40% vs. 19%).

The remainder of this report refers to 'media consumers' and 'media-dark' young people, using the definition of having access to media on a monthly basis.



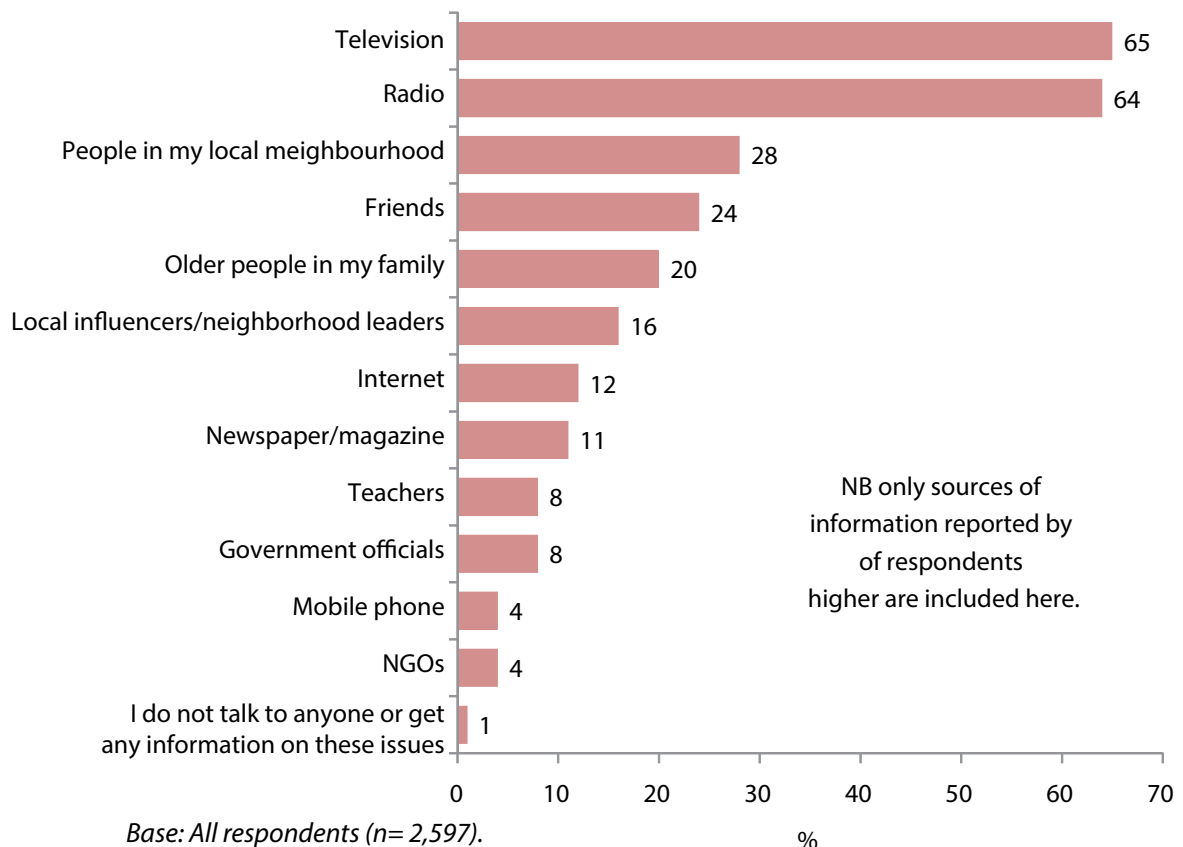
⁹ Examining the data by monthly media use was chosen to give a realistic definition of youth in Cambodia considered to be media dark. Given the widespread TV and radio access in Cambodia, not having access to at least one media platform at least once a month was thought to be a reasonable measure of those who could be termed media dark (even if they did have some less frequent access).

5 WHAT ARE THE KEY SOURCES OF CIVIC INFORMATION FOR YOUTH IN CAMBODIA?

KEY FINDINGS

- Traditional media of TV and radio are both key sources of information about civic engagement and current affairs.
- Traditional media are highly trusted overall even by media-dark youth.
- Social contacts, such as senior family members, are the most trusted source of information for civic engagement issues and current affairs for young people in Cambodia, with a majority of youth strongly trusting them as a source of this information.
- The high trust in social contacts remains consistent across youth media consumers and those who are media dark.

Figure 13: Sources of information about civic engagement and current affairs for youth in Cambodia



Q: What are your main sources of information for civic engagement issues and issues of the day?

5.1 SOURCES OF INFORMATION FOR CIVIC ENGAGEMENT ISSUES AND CURRENT AFFAIRS

The traditional media of television and radio are key sources of information about civic engagement issues and current affairs

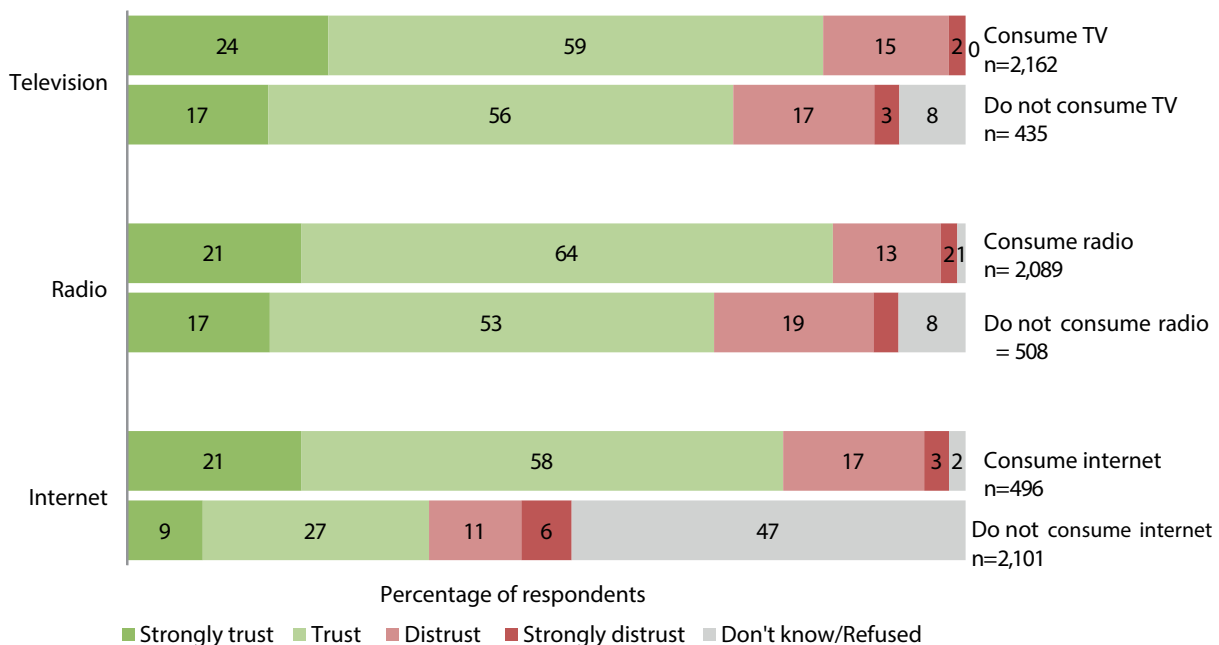
Nearly two-thirds of youth (65%) reported TV as a source of information about civic engagement issues and current affairs, and a similar proportion (64%) reported radio as a source of this information. Following these traditional media sources, close personal contacts were the next most common sources of information about civic engagement issues and current affairs. Three in ten (28%) young people reported speaking to people in their neighbourhood, just under a quarter (24%) talk to friends, and one in five (20%) consult older family members.

Although TV and radio are both key sources of information about civic engagement and current affairs,

overall, social contacts are the most trusted by youth in Cambodia as sources of information regarding these issues. For example, six in ten (60%) youth said they strongly trust older family members as a source of such information, contributing to an extremely high level of overall trust (97%) in this group. Local village elders and government officials, although not as strongly trusted (29% and 27% respectively), still enjoyed high overall levels of trust (86% and 81%).

Traditional media, though slightly less trusted as a source of information in this area than social contacts, were also highly trusted. Overall, around one in five youth in Cambodia strongly trusted TV (23%) or radio (20%), and overall eight in ten youth trusted them as sources of information (81% and 82%). As might be expected, trust in media as a source of information varies between those who are media consumers and those who are media dark. This was particularly the case for trust in the internet as a source of information about civic engagement and current affairs.

Figure 14: Trusted sources of information about civic engagement and current affairs for youth in Cambodia



Q: How much do you trust these sources for information on civic engagement issues and current affairs

6 WHAT IS THE RELATIONSHIP BETWEEN MEDIA CONSUMPTION, VOTING BEHAVIOUR AND PERCEPTIONS OF ELECTORAL FREEDOM?

KEY FINDINGS

- Two-thirds of youth voted in the 2013 national election, with media consumers more likely to say that they had voted than media-dark youth.
- The majority (70%) of media consumers are 'very likely' to vote in future National Assembly elections or Commune Council elections (63%) compared to those who are media dark.
- Media is a key, but not universal, source of information on the issue of voting for young people in Cambodia. Senior family members are more important than media as a source of information for young people in deciding who to vote for.
- Overall youth in Cambodia feel fairly free when it comes to voting-related behaviours. Although media consumers and media-dark youth report similar levels of freedom related to speaking out, media consumers are more likely to think that youth are free to join any group they want and vote without being pressured.

6.1 REPORTED VOTING BEHAVIOUR

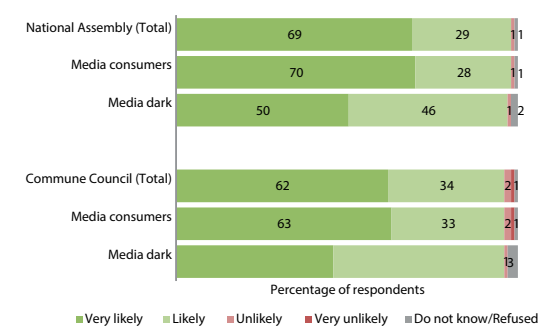
Two-thirds (66%) of young people who were eligible to vote reported that they voted in the national election in July 2013. Youth who were media consumers were more likely than media-dark youth to report that they had voted in the 2013 National Assembly election (67% vs. 56%). Participation in the Commune Council elections in June 2012 was comparatively lower, with nearly half (47%) of those who were eligible to vote reporting that they did so.

Almost all young people indicated they would vote in a future national election, with seven in ten (69%) reporting they would be very likely to vote. An

overwhelming majority also indicated they would vote in the Commune Council election, with nearly two-thirds (62%) indicating they would be very likely to vote. Although these high levels of agreement mean the aggregate reported likelihood to vote in any future National Assembly or Commune Council elections is similar for media consumers and media-dark youth, this masks a notable difference in strength of agreement. Although seven in ten (70%) of youth media consumers reported being very likely to vote in a future National Assembly election, just half (50%) of media-dark youth felt the same way. This pattern is also found with regard to a future Commune Council election (63% vs. 46%).¹⁰

¹⁰Although polling around voting intentions in Cambodia is too limited to make statements on this with certainty, research in other countries has found that only those respondents who express a strong likelihood (or rather certainty) of voting in an upcoming election are in practice likely to do so.

Figure 15: Likelihood of voting in future elections by media consumption



Base: Media consumers = 2,431; Media dark = 166

Q: How likely are you to vote in the next elections? a. In a National election b. In a Commune/sangkat election

6.2 SOURCES OF INFORMATION ABOUT VOTING

Overall, senior family members were the most commonly identified source (21%) of information for young people in Cambodia when deciding which candidate or party to vote for, closely followed by TV (19%) and more than one in ten (14%) identified the radio as their main source of information informing voting behaviour. Understandably, media-dark youth were more likely to report family as their primary source of information. Almost a third of media-dark youth reported senior members of their family as their primary source of information on this topic compared to just one in five media consumers (32% vs. 20%).

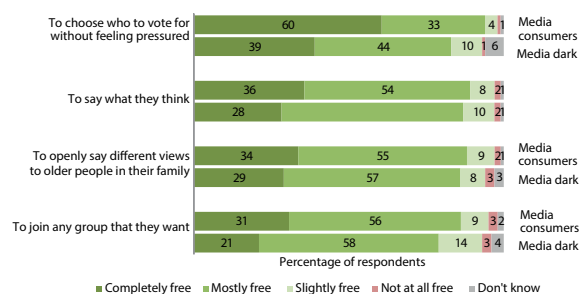
Reflecting this relatively prominent role for the media in providing information around elections, the majority of those eligible to vote feel that information and debate in the media influences their decision who to vote for. Eight in ten young people felt it influences their decision to some extent (83%), with one in five (22%) indicating that that it does so to a great extent. However, it should be noted that this reported influence was not universal,

and even one in ten eligible media consumers (13%) reported that the media did not influence their decision at all.

6.3 PERCEIVED ELECTORAL FREEDOM

Overall, youth in Cambodia felt fairly free when it comes to voting-related behaviours. The majority of young people feel that youth in Cambodia are completely or mostly free to choose who to vote for, to say what they think, to disagree with senior family members, and to join groups. Although media consumers and media-dark youth reported similar levels of freedom related to speaking out, media consumers were more likely to feel youth are completely or mostly free to join any group they want (87% vs. 79%) and vote without being pressured (93% vs. 83%). These differences are particularly striking when focusing on the proportion of young people who report that youth are completely free. Although six in ten media consumers (60%) felt that youth in Cambodia are very free to choose who to vote for without feeling pressured, just four in ten (39%) of media-dark youth felt the same way.

Figure 16: Perceived freedoms relating to voting



Base: Media consumers = 2,431; Media dark = 166. Gaps in chart represent those who report a neutral opinion. In your opinion, in this country how free are young people like you to do the following... Are they completely free, mostly free, slightly free or not at all free?

7 WHAT IS THE RELATIONSHIP BETWEEN MEDIA CONSUMPTION AND YOUNG PEOPLE'S KNOWLEDGE, ATTITUDES AND PRACTICES RELATING TO CIVIC ENGAGEMENT?

KEY FINDINGS

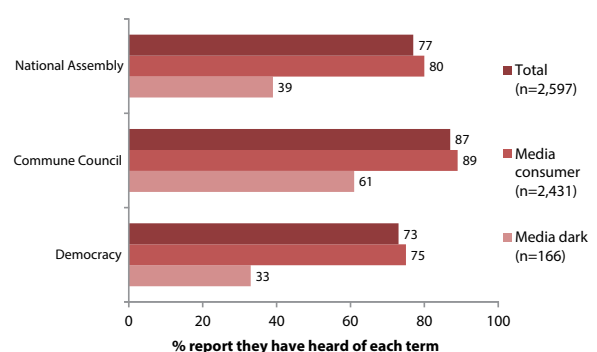
- Youth media consumers are more likely to be aware of key democratic terms and to report knowing what these terms mean.
- Media consumers are more likely than media-dark youth to be aware of opportunities for participation and to report that they have participated in these opportunities in the last twelve months.
- Media-dark youth are less likely to feel they have the courage to speak out when older family members expect them to follow their views, and are also less likely to agree that they feel brave enough to say what they think and take action in their community.

7.1 MEDIA CONSUMPTION AND KNOWLEDGE OF DEMOCRATIC CONCEPTS AND INSTITUTIONS

To assess the level of access to information about civic life young people in Cambodia have and to gauge young people's level of awareness of terms associated with civic engagement, young people were asked whether they had heard of the National Assembly (រដ្ឋសភាជាតិ), the Commune Council (ក្រុមប្រឹក្សាឃុំសង្កាត់) and democracy (ប្រជាធិបតេយ្យ).

Overall, the majority of youth in Cambodia have heard of key democratic institutions and concepts. Almost three-quarters of youth in Cambodia (73%) have heard of the term 'democracy', 77% have heard of the National Assembly, and 87% have heard of the Commune Council. Within these findings however, there were key differences in levels of awareness between those youth media consumers and those who are media dark. Youth media consumers were more likely than media-dark youth to have heard of all three terms.

Figure 17: Percentage of youth who report they have heard of key democratic institutions & concepts

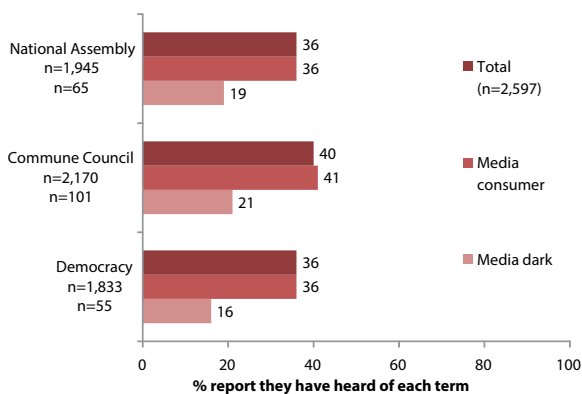


Q: Have you heard of the National Assembly/Commune Council/democracy?

These patterns of higher awareness among media consumers could be seen across all media platforms. For example, youth in Cambodia who consume TV are more likely than those who do not to say they have heard of the National Assembly (82% vs. 53%).

Young people have heard of key democratic terms, but are less likely to know what they mean. The proportion of young people who said they know what each of the institutions are or what the term 'democracy' means is smaller than those who were just aware of the terms, indicating that youth either have less understanding than awareness, or that they are less confident in their level of knowledge. Overall just over a third (36%) of young people who said they are aware of the term 'democracy' say they know what it is, and an equal proportion (36%) report the same for National Assembly, though the proportion is slightly higher (40%) for understanding of Commune Councils. Youth media consumers were almost twice as likely as media-dark youth to say that they know what each of these terms is.

Figure 18: Percentage of youth who report knowing what key democratic institutions are & what democracy means

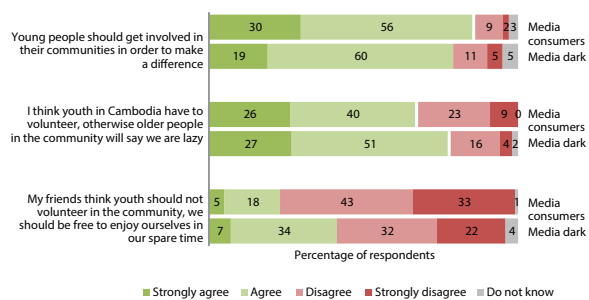


Q: Do you know what the National Assembly/Commune Council/democracy is?

7.2 MEDIA CONSUMPTION AND CIVIC ATTITUDES AND PARTICIPATION

Media consumption is associated with differences in young people's attitudes towards civic engagement. For example, media-dark youth were less likely than media consumers to agree that young people should get involved in their communities to make a difference (79% vs. 86%).

Figure 19: Attitudes towards civic engagement

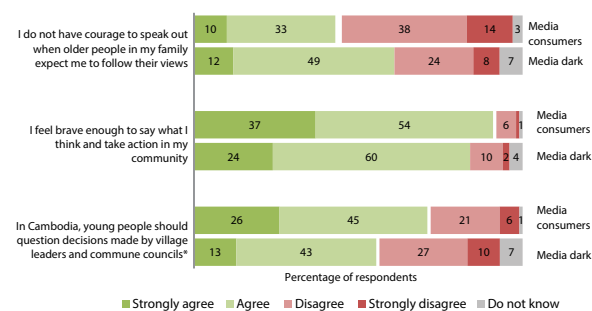


Base: Media consumers = 2,431; Media dark = 166. Gaps in chart represent those who report a neutral opinion.
Q: Now I would like to ask your opinion of young people's participation. When I refer to young people I mean people in Cambodia between the ages of 15 and 24. Do you agree or disagree with the following statements?

When considering the role of young people in decision-making in the community, youth in Cambodia are overwhelmingly positive about the principle of youth civic participation and about the potential for increased participation. Nine in ten agreed that young people should get more involved in their commune councils (90%), that they should be able to raise proposals and ideas about community development (92%), and that young people should be involved in decision-making at the Commune Council level (87%).

However, media-dark youth were more likely to report that they do not have the courage to speak out when older family members expect them to follow their views (61% vs. 43% of youth media consumers) and were less likely to report that they are brave enough to say what they think and take action in their community (84% vs. 91%). In contrast, youth media consumers were more likely to disagree that they should not question the decisions of village leaders and commune councils (71% vs. 56% of media-dark youth).

Figure 20: Attitudes towards civic engagement



Base: Media consumers = 2,431; Media dark = 166. Gaps in chart represent those who report a neutral opinion.
* This statement was given as a negative statement in the survey: "Young people should not question decision made by village leaders", and the percentage reported here is the proportion that disagreed with the statement.
Q: Now I would like to ask your opinion of young people's participation. When I refer to young people I mean people in Cambodia between the ages of 15 and 24. Do you agree or disagree with the following statements?

Media consumption also has an impact on young people's awareness of opportunities for civic participation. Overall, nearly nine in ten (89%) of young people reported they had heard about at least one opportunity for participation in their community. Nearly all youth media consumers have heard of opportunities for participation in their community compared to eight in ten media-dark youth (94% vs. 82%). The most common form of participation youth had heard about was contributing to the Commune Development Plan. Almost two-thirds (63%) of media consumers and over a third (35%) of media-dark youth reported that they had heard about an opportunity to contribute to the Commune Development Plan.

8 CONCLUSIONS

MEDIA ACCESS AND USE

- Access to traditional media in some form is near universal. The majority of young people in Cambodia have access to TV, radio or mobile phone at least once a month. Although levels of access to TV and radio are the same, the frequency of use differs substantially. The TV audience is much more likely to be watching daily compared to the radio audience, suggesting that the TV audience is easier to access because they engage more frequently.
- Evenings are the peak time for TV and radio use, though radio also peaks early in the morning and around lunchtime too.
- Generally, women are less likely to have access to TV and radio compared to men; rural young people are less likely to have access than their urban counterparts and those with lower incomes have less access than those with higher incomes.
- Mobile phones are mostly used for calls, accessing radio and texts. There is near equal access for males and females, urban and rural and all age groups. Income group does show markedly different patterns for access for mobile phones, however. The widespread access to mobile phones presents a useful potential method of reaching the majority of young people in Cambodia. However, the challenges of multiple Sims and networks would need to be addressed.
- There is an interesting use of mobile phones for listening to the radio among young people.

Although radio is behind TV in terms of use, listening to the radio via mobile phone is popular, as it is the second most common use of the mobile phone after making and receiving calls. It will be interesting to track youth access to and use of radio both in the traditional format and on mobile phones in future, as it is likely that personal mobile phone access will increase among young people in Cambodia.

- Although a sizeable portion of young people in Cambodia have accessed the internet, the majority do not have access. Those who do are much more likely to be urban, male and within the higher income groups, suggesting that internet is still restricted to only a certain group within the youth population.

TRUST IN MEDIA AND SOURCES OF INFORMATION

- Media such as TV and radio are the most common sources of information regarding civic engagement issues and current affairs; however, social contacts – although not used so commonly as sources – are the most trusted sources of information on such issues.
- Social contacts such as family members, local village elders and government officials are key trusted sources of information for young people as the high trust in these groups of people remains consistent across all youth – regardless of whether they are media consumers or media dark.

MEDIA CONSUMPTION AND CIVIC ENGAGEMENT

- Media is a key information source regarding voting (after senior family members), and its influence is recognised by youth with the majority reporting it has at least a small amount of influence on their decision of who to vote for. Young people who are media consumers are more likely to participate and feel able to do so: they are more likely to vote in future elections and are much more likely to perceive to have more freedom in deciding how to vote.
- There is a positive association between media consumption, higher levels of civic knowledge and increased interest in civic engagement; this suggests that media can continue to support and reinforce these trends.

APPENDIX I: STUDY LIMITATIONS AND QUALITY ASSURANCE MEASURES

While every effort has been made to ensure that the data collected is robust, issues around social desirability may act as a limitation on this study.

As with all face-to-face survey methodologies, there is the risk that the presence of an interviewer (as opposed to a self-administered questionnaire) may have an impact on respondents' answers, causing them to provide what they perceive to be more 'socially desirable' responses. This is particularly the case given the relatively sensitive post-election environment in which fieldwork took place.¹¹ This possibility is more of a risk for attitudinal questions than for the media consumption questions that make up the majority of this report, but overall BBC

Media Action took several steps to limit the possible impact of any social desirability effect:

- In commissioning an experienced agency to conduct fieldwork BBC Media Action was able to ensure that well-trained and experienced interviewers conducted the interviews, which was further supported by detailed project-specific training.
- All interviewers were as close in age to the respondents as was practical (aged 22 to 35) while still ensuring that they had the necessary skills needed to conduct the interviews.
- During the interviews respondents were assured of the confidentiality of their answers, were not required to give a full name (a first name or nickname was acceptable) and were informed of their right to refuse to answer any question.

As with most research of this nature, it is not possible to attribute causality on the basis of correlation. This report contains findings primarily based on bivariate analysis (comparing the relationship between two variables) to investigate how responses to questions varied by certain demographics. Although this analysis can tell us which subgroups are more likely than another to have given a particular answer, it is not sufficient to establish the cause of this association. For example, although media consumption is associated with an increased likelihood of a respondent reporting awareness of the Commune Council, bivariate analysis is not enough to say that media consumption is the cause of this increased likelihood.

¹¹ The 2013 general election in Cambodia took place on 28 July, however results were not formally announced until 8 September and during the fieldwork period there was much discussion in some media about the validity of the provisional results and reported irregularities during polling.



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N° 53, Pasteur Street, Boeung Keng Kang I
P.O. Box 877
Phnom Penh Cambodia
Tel: +855 (0) 23 216167
Fax: +855 (0) 23 216 257
E-mail: registry.kh@undp.org
www.kh.undp.org
www.facebook.com/UNDPCambodia
www.twitter.com/UNDPCambodia