IRL Hotspot Survey Cambodia

Quantitative Lifestyle Study During Covid-19

Wave 1 (April 2020) | Report

Prepared by | Ren Ferrer
Date | May 6, 2020

Get in touch with your customers during this pandemic time via IRLBlast

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- An Online Survey tool whose survey links will be sent via SMS in smartphones using any or combination of the following contact sources
    1. Mobile phone numbers from our mobile service provider partners (Cellcard, Smart and Metfone)
    2. IRLPanel (online managed panel of IRL, ~5K panelists)
    3. Facebook followers of IRL, ~7K followers)

- Good alternative to traditional interview methodologies namely, face-to-face and telephone surveys

- Ideal for quick surveys (1 -2 calendar days of fieldwork) with a total project turn-around time of 8 – 10 calendar days

- Good for short surveys : 25 minutes or less

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To know more about this product, please reach your respective Business Partners or via these touchpoints :

- Email : cambodia@indochinaresearch.com ; francis@indochinaresearch.com
- Tel: +855 (0) 23 215 184
- Web: www.indochinaresearch.com

INFORMATION LIST

1 COVID-19

How did the global pandemic affect personal and shopping habits of Cambodians?

2 Korean Pop Culture

Do Cambodians ride the Hallyu?

3 Online Food Delivery

Where almost everyone is mobile, is online food delivery being patronized?

4 Online Shopping

How are Cambodians in internet as market of things?

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Learning From The Best Practices & Customizing Our Design

Adapting to Cambodia's landscape by:

- Modernizing the way data is collected via IRLBlast
- Providing cost effective alternative for quick surveys
- Actionable results for target market

DESIGN

Quantitative Lifestyle Study via IRLBlast

Offers macro-level trends as well as a detailed understanding on specific issues or topics

METHODOLOGY

Self-accomplished online survey

- via structured questionnaire in Khmer language using Qualtrics as data collecting software
- Survey link were sent via SMS using database of mobile service providers in Cambodia
- Average length of interview is at around 25 minutes

RESPONDENT CRITERIA

Residents in Phnom Penh

- Male / Female
- All socio-economic classes (SEC)
- 16 - 65 years old
- Smartphone users

Quota was not set at any demographics profile as this is a general population survey.

FIELDWORK PERIOD AND SAMPLE SIZE

- N=234 people
- April 2 - 10, 2020

NOTES IN READING THE REPORT

SIGNIFICANCE TESTING.

- **Percentage values** are presented in the charts and are all tested for significant testing (95% confidence level).
- **Letter legend** at the side of the number denotes it is significantly higher or lower at 95% confidence level vs. the other

DATA WEIGHTING.

- As the results of a quantitative study are intended to generalize the findings drawn from the sampled group, data is weighted in such way it mirrors the demographics profile (age, gender and socio-economic class) of the general population.

DATA CAVEAT.

- In terms of readability, sample size of at least n=30 is still readable. Data from this sample size can be read quantitatively wherein findings are considered stable. Sample size lower than 30 should be read with caution and excluded from further statistical analysis (e.g. significance testing).
- Data with small sample size is marked with (*) which means = Caution in reading, small base.

EXECUTIVE SUMMARY

1

Covid 19 is disrupting the lifestyle of Phnom residents

- There is high "fear factor" of the virus that impacts the mental health (more than physical and emotional health). Given this, a variety information sources about the virus is being sought after especially Facebook and government/NGO agencies
- Khmers acknowledge the seriousness of the virus and hence, physical distancing is being done, albeit inconsistently as Khmers still do social interactions but with precautionary measures
- These protections include the following ;
  - More purchase of Covid 19 product essentials – alcohol, alcogel, face masks and basic foods like rice and instant noodles to the detriment of product vices (beer, cigarettes, liquor)
  - Less travel and personal visits on stores/channels (with stay at home policy)
  - Increase in cashless transactions/digital payments

2

K – Pop is generally accepted in Phnom Penh

- Half is aware and most of them watch its contents frequently (2x-3x a week) with its uniqueness (as a content) and appeal (in terms of story plot and celebrities) as its salient points.
- Youtube and Facebook are the key channel sources of K-Pop

3

Online Food Delivery is still a "young" food service segment indicatively dominated by Nham 24

- Caters to younger and upper income class who are acknowledging the convenience benefit of it
- Has infrequent (2-3x a month) and small (USD5) purchases that is largely paid via cash

4

Online shopping is gaining traction with 47% incidence

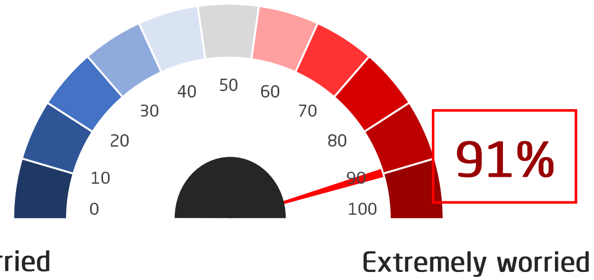
- Online shoppers are skewed towards younger and upper income class who pay in cash and buying from Facebook for personal items (footwear, tops, accessories)
- Generally good online shopping experience is happening (with convenience as the main trigger point and high satisfaction on last transaction)


COVID-19

Disposition and Health Condition During COVID-19

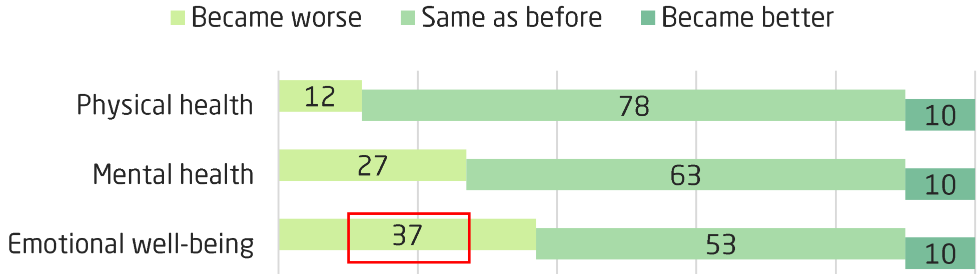
Base: All respondents (n=234), in %

How worried are they about the spread of COVID-19 in Cambodia?



	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
Extremely worried	91	88	95	89	93	93	90
Somewhat worried	7	9	5	10	6	6	9
Not worried	1	2	0	0	1	0	2
Not sure	1	1	0	2	0	1	0

How has their health changed last February 2020 vs March 2020?



		TOTAL	GENDER		AGE		SEC	
			Male	Female	16-29	30-65	ABC+	C-DE
	Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
Physical Health	Better	12	13	12	17	10	11	13
	Same as before	78	82	74	82	76	83	74
	Worse	10	5	14 A	2	14 C	6	13
Mental Health	Better	10	13	7	13	9	7	13
	Same as before	63	64	62	73 D	57	66	60
	Worse	27	23	30	14	34 C	27	27
Emotional well-being	Better	10	13	6	12	8	7	12
	Same as before	53	52	55	67 D	46	58	49
	Worse	37	35	39	22	46 C	36	38

With extreme concern about Covid 19, emotional well-being of Phnom Penh residents is most affected compared to physical and mental health driven by the older group.

Q8. How worried or unworried are you regarding the spread of Corona Virus or COVID-19 in Cambodia?
Q16.1. How has your physical health changed in March 2020 due to news about Corona Virus or COVID 19, if at all?
Q16.2. How has your mental health changed in March 2020 due to news about Corona Virus or COVID 19, if at all?
Q16.3. How has your emotional well-being changed in March 2020 due to news about Corona Virus or COVID 19, if at all?

Sources of Information About COVID-19

Base: All respondents (n=234), in %

	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
Online / Social Media	92	93	91	92	92	97 F	87
Facebook	88	89	88	90	87	93 F	84
Youtube	32	31	33	38	29	39 F	25
Twitter	2	2	2	6 D	0	2	2
Instagram	5	5	4	6	4	5	4
News Outlets' Websites	31	36	26	36	28	38 F	24
Newsfeeds	11	11	10	11	10	11	10
Tiktok	5	6	4	6	5	6	4
Government / NGO	64	74 A	54	71	60	70	58
Ministry of Health of Cambodia	52	63 A	41	57	49	58	46
World Health Organization	31	35	27	34	29	37 F	25
Government Office Website	27	35 A	18	33	23	32 F	22
Local Officials	26	26	25	25	26	32 F	19
Roving Public Announcements via Vehicles	25	26	23	21	26	30	19
Pasteur Institute	11	11	11	7	13	12	10
Word-of-Mouth	64	66	63	58	68	67	61
Family	43	43	42	44	42	50 F	36
Friends	53	54	53	49	56	60	48
Officemates	42	48	36	33	47 C	48	36
Traditional Media	57	63	51	60	55	60	54
TV	54	57	51	59	51	58	51
Radio	15	19	12	11	18	15	16
Newspaper	3	4	2	4	2	3	4
Text messages from MSP	24	27	20	21	25	28	20
Average no. of sources	**5.78**	**6.29**	**5.27**	**5.91**	**5.71**	**6.58**	**5.03**

Given the extreme distressing situation, Khmers rely on variety of sources of information about Covid 19 : Facebook, government agencies, traditional media and WOM (word-of-mouth).

Q10. Where do you get information about Corona Virus or COVID-19?

Activities Done Last March 2020

Base: All respondents (n=234), in %

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	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
Meet friends	86	80	93 A	81	89	89	83
Wash your hands more often with soap and water	73	70	76	71	74	79 F	67
Work from home more often	53	52	55	59	51	59	48
Go to the mall	52	58	46	53	52	58	47
Take vitamins	47	48	45	42	50	61 F	34
Stay inside the house most of the time	39	45	33	43	37	45	33
Go back to the province	23	15	31 A	21	24	24	22
Sanitize your hands more often with alcohol or hand sanitizer	17	21	12	18	16	20	14
Cancelled or skipped large gatherings	11	15	7	20 D	6	13	10
Observe more health status more seriously	10	11	8	13	8	12	7
Stop shaking hands with other people	9	12	6	13	7	9	9
Visited family and friends in the province	8	10	5	4	10	3	12 E
Keep yourself updated with the current events	6	7	6	13 D	2	9	4
Self-quarantined	4	5	4	6	3	6	3

Despite the extreme worisomeness of Covid 19, most Khmers maintain their normal lifestyle of socializing (as there is no long people mobility restrictions). Nevertheless, majority of them take some precautions against Covid 19, especially the upscale households.

Q11. Compared to February 2020, have you done the following in March 2020

Awareness About Social / Physical Distancing and Its Purpose

Base: All respondents (n=234), in %

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Have you heard about "social or physical distancing "?

84%
are aware

	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
Aware	84	94 B	73	86	82	79	88
Not aware	16	6	27 A	14	18	21	12

Do you think "social or physical distancing" is effective in reducing COVID-19 cases?

	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
NET: Effective	84	84	84	92 D	80	81	87
Very effective	34	38	30	38	32	30	38
Effective	50	46	54	53	48	51	50
Can't say	15	14	15	7	19 C	17	13
NET: Not Effective	1	1	1	1	1	2	0
Not effective	1	1	1	1	1	2	0
Not at all effective	0	0	0	0	0	0	0

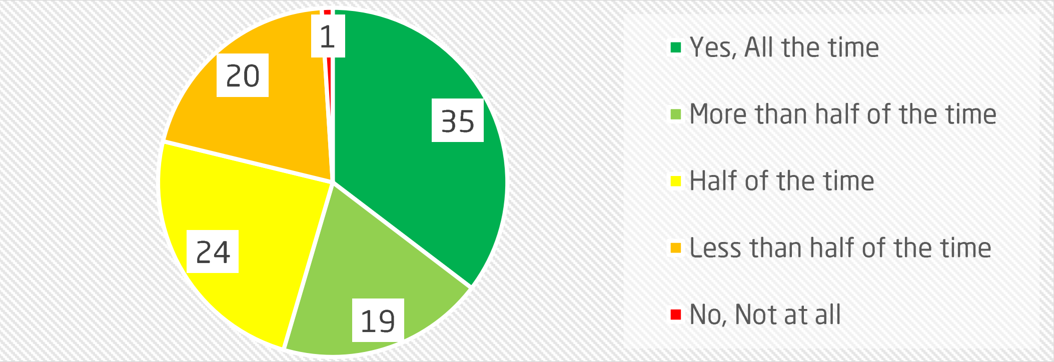
And part of the precautions adopted by Khmers is physical distancing with most acknowledging its effectiveness to reduce Covid 19 cases. This can be attributed to their strong knowledge of Covid 19 precautionary measures from the variety of information sources about the virus.

Q12. Have you heard about 'social or physical distancing' ?
Q14. In your opinion, how effective is social or physical distancing in decreasing the chances of getting infected with Corona Virus or COVID 19?

Whether Social / Physical Distancing is Being Practiced

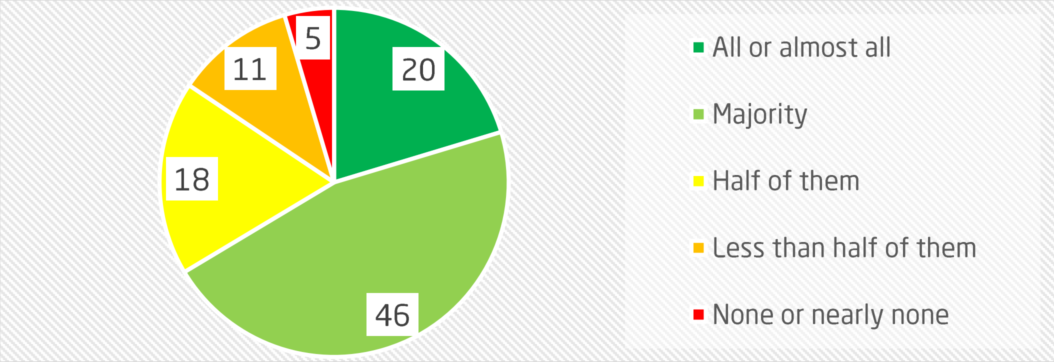
Base: All respondents (n=234), in %

Whether Social / Physical Distancing is Being Practiced Personally



	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
NET: More than half	54	61	49	64	51	58	52
Yes, all the time	35	38	33	41	33	35	36
More than half of the time	19	23	16	23	18	23	16
Half of the time	24	19	29	20	26	25	23
NET: Less than half	21	20	23	18	23	17	25
Less than half of time	20	18	23	17	22	17	23
No, not at all	1	2	0	1	1	0	2

Whether Social / Physical Distancing is Being Practiced By Family or Close Friends



	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
NET: More than half	66	66	67	77 D	60	69	63
All or almost all	20	20	21	22	19	21	19
Majority	46	46	46	55 D	41	48	44
Half of them	18	17	19	14	20	18	18
NET: Less than half	16	18	13	9	20 C	13	18
Less than half of them	11	14	8	5	15 C	8	14
None or nearly none	5	4	5	4	5	5	4

And physical distancing is practiced by most Khmers, albeit inconsistency.

Q13. Do you currently practice social or physical distancing or do you deliberately increase the physical space between you and other people to avoid spreading Corona Virus or COVID 19?
Q15. How many among your family or close friends currently practice social or physical distancing in the past few days to avoid contacting Corona Virus or COVID 19?

Purchase Power Index (PPI) of Product Categories During Covid 19 : | A Primer

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To measure the PPI of the product, IRL takes into account two questions

1. Incidence of purchase of each product in March 2020
2. Purchase frequency perception of each product (whether buy more, buy less, buy the same) from March vs. February 2020

Indices are made per product for each question. Index is computed as follows :

- Purchase incidence Index : % of incidence of purchase of each product divided by average of % of incidence of all 32 products included in the study
- Purchase Frequency Perception Index
  - % of buy more Product A divided by average of % of buy more of all 32 products included in the study
  - % of buy less Product A divided by average of % of buy less of all 32 products included in the study

PPI is computed by combining

- Purchase Incidence Index + Purchase Frequency Perception Index (Buy More) to come up with PPI Buy More (which product categories increased in March 2020)
- Purchase Incidence Index + Purchase Frequency Perception Index (Buy Less) to come up with PPI Buy Less (which product categories declined in March 2020)

Purchase Power Index (PPI) of Product Categories During Covid 19 : | Summary

Purchase Incidence and Purchase Frequency Perception (Buy More or Buy Less) - March 2020 vs. February 2020

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Ranking	PPI BUY MORE INCREASING Purchase Power (Penetration X Purchase Frequency - Buy More)	PPI BUY LESS DECLINING Purchase Power (Penetration X Purchase Frequency - Buy Less)
1	Alcohol and Alcogel *(tie for number 1 position)*	Beer
2		Liquor/wines
3	Face masks	Cigarettes
4	Rice	Bread
5	Instant noodles	Electronic gadgets
6	Healthy foods (fresh meat, vegetables, fish)	Coffee
7	Tissues	Biscuits
8	Food seasoning	Chocolate drinks
9	Bottled water	Canned products
10	Processed meat	Ready-to-drink juice

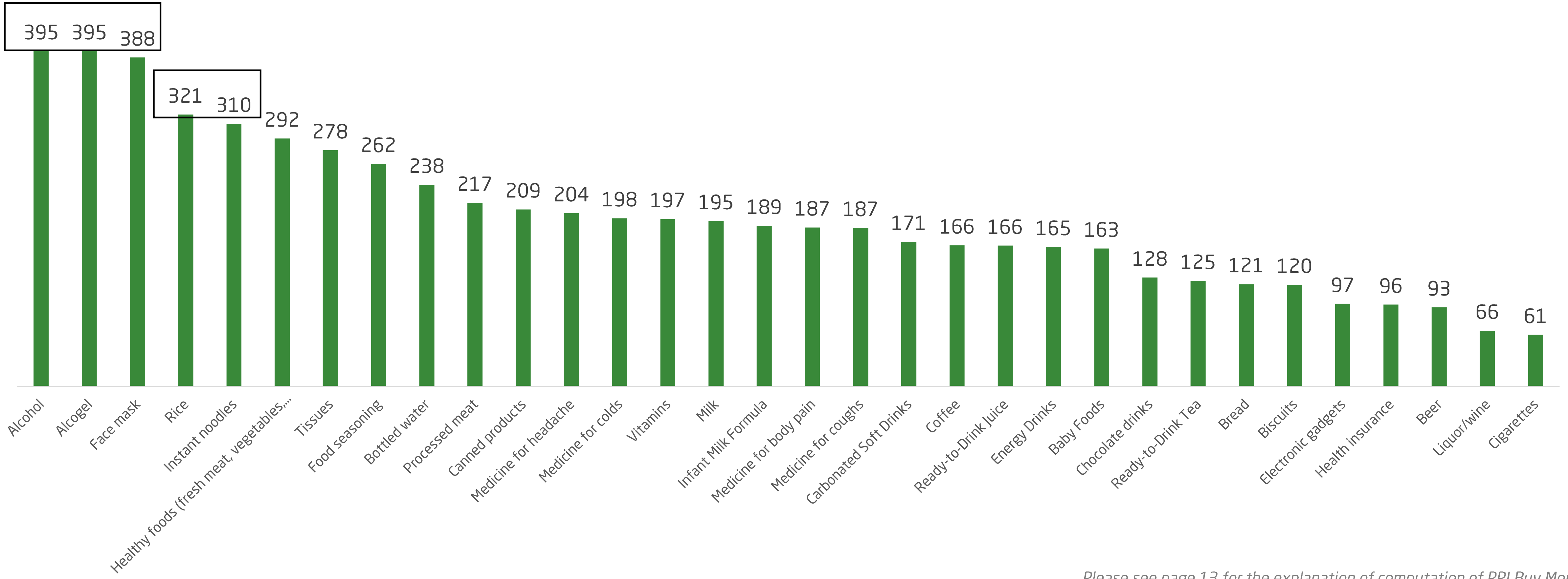
Please see page 13 for the explanation of computation of PPI Buy More /PPI Buy Less

The inconsistent practice of physical distancing can be due to Khmers buying more the Covid 10 protection essentials. Conversely, recreational products are the most negatively impacted by the pandemic.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

Purchase Power Index (PPI) of Product Categories During Covid 19 : | BUY MORE

Purchase Incidence and Purchase Frequency Perception (Buy More) - March 2020 vs. February 2020



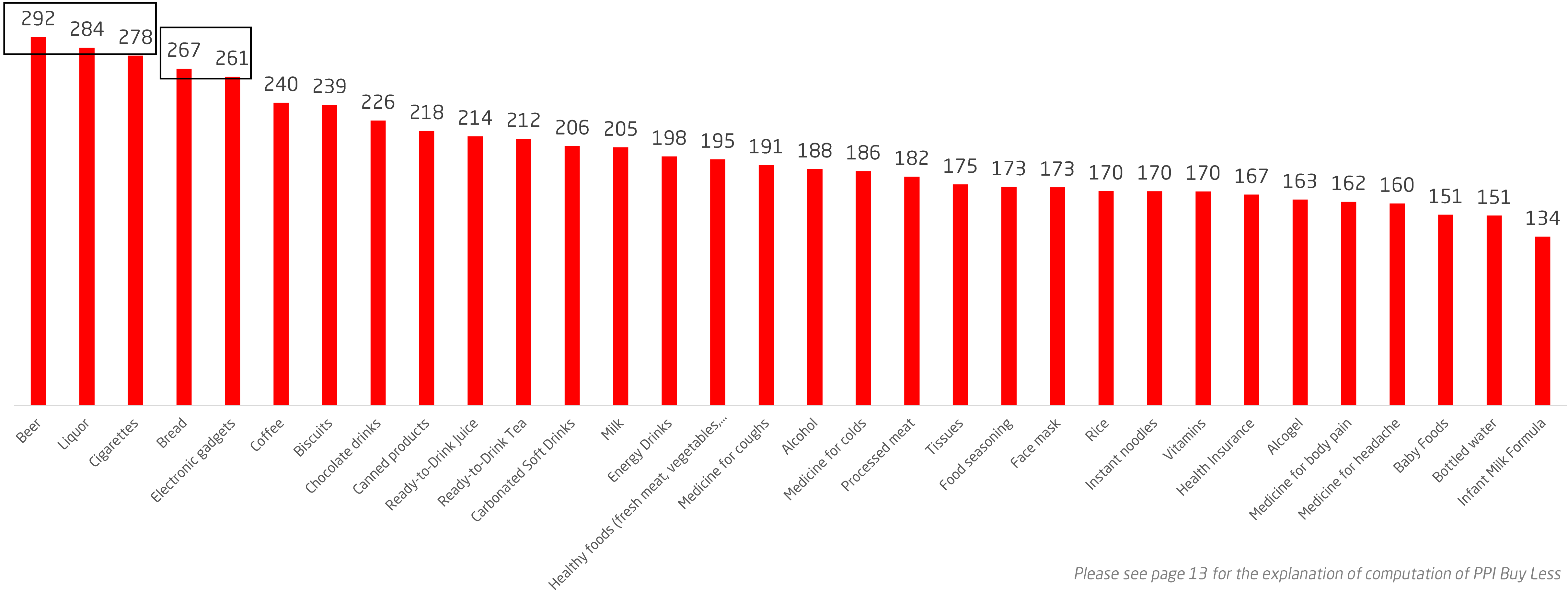
Please see page 13 for the explanation of computation of PPI Buy More

Aside from Covid 19 protection essentials, Khmers are stocking up on the basic source of carbohydrates - rice and instant noodles.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

Purchase Power Index (PPI) of Product Categories During Covid 19 : | BUY LESS

Purchase Incidence and Purchase Frequency Perception (Buy Less) – March 2020 vs. February 2020



Please see page 13 for the explanation of computation of PPI Buy Less

On the other hand, aside from the "product vices", purchase of electronic gadgets and breads (owing to its short shelf life) round up the top 5 most negatively affected products by Covid 19.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

Purchase Incidence and Habit Changes: March vs. February 2020 (i)

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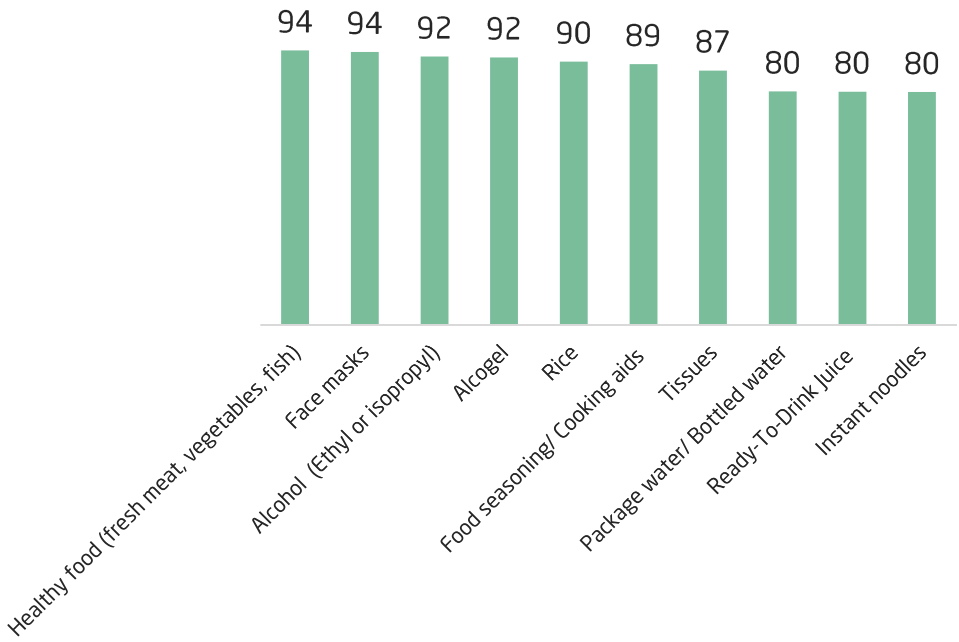
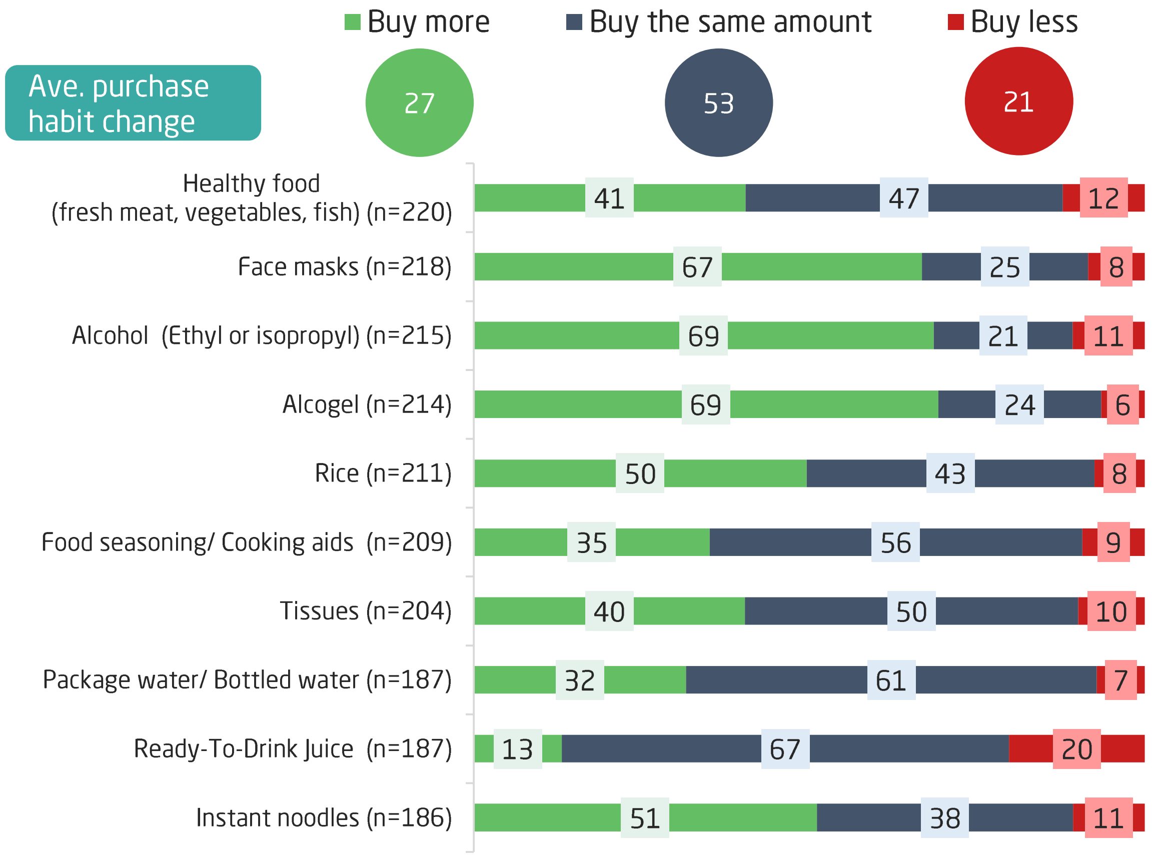
Base: All respondents (n=234), in %

Category Penetration : March 2020

Ave. Category Penetration: 69



Purchase Habit Changes : March vs. February 2020



INDEX*	
Buy More	Buy Less
152	59
250	41
256	52
259	31
186	36
132	45
151	48
118	35
49	98
191	52

Covid 19 brings strong impact on the purchase frequency of face masks, alcohol and alcogel. Aside from this, purchase frequency of rice, cooking aids, instant noodles, tissues and bottled water are greatly impacted on a positive tone.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

**Buy more/Buy less Index is % of buy more/less of category divided by average % of buy more/less of all 32 categories ; Above 100 index means higher than average buy more/less % ; Less than 100 index means lower than average buy more/less %*

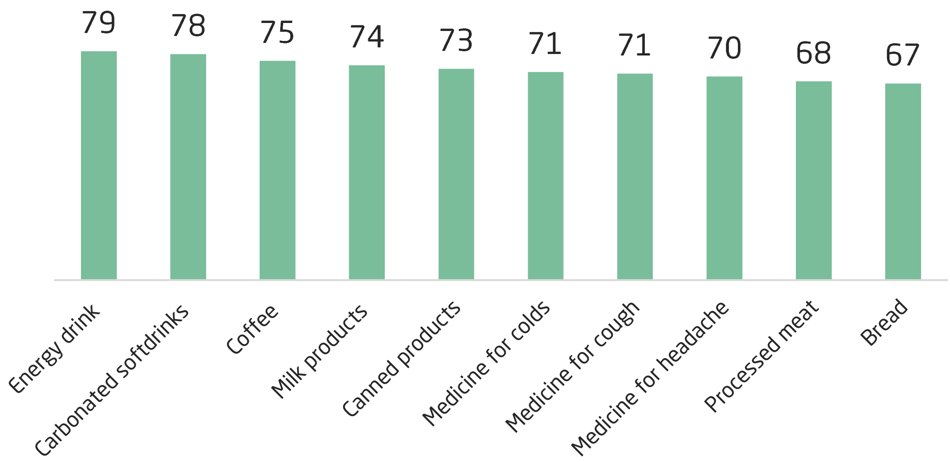
Purchase Incidence and Habit Changes: March vs. February 2020 (ii)

Base: All respondents (n=234), in %

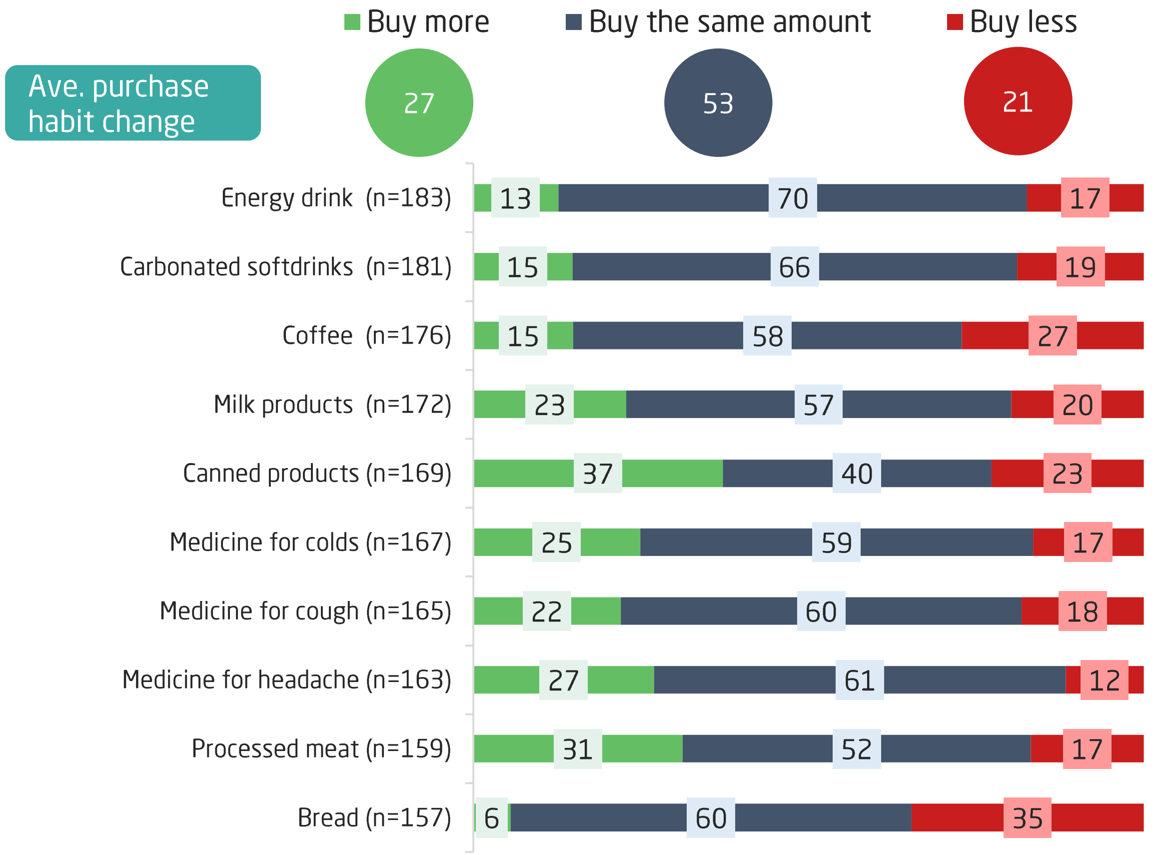
Indochina Research

Category Penetration : March 2020

Ave. Category Penetration: 69



Purchase Habit Changes : March vs. February 2020



INDEX*	
Buy More	Buy Less
48	84
55	91
56	131
85	96
139	110
93	80
82	88
101	56
117	81
21	168

Meanwhile, foods with longer shelf-life such as canned food and processed meat are also bought more along with medicine for headache. Conversely, bread and coffee are negatively affected.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

*Buy more/Buy less Index is % of buy more/less of category divided by average % of buy more/less of all 32 categories ; Above 100 index means higher than average buy more/less % ; Less than 100 index means lower than average buy more/less %

Purchase Incidence and Habit Changes: March vs. February 2020 (iii)

Base: All respondents (n=234), in %

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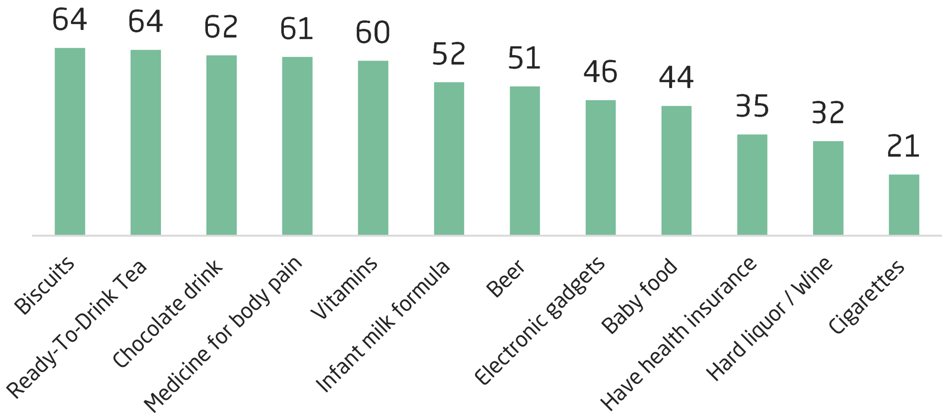
Category Penetration : March 2020

Ave. Category Penetration: 69



Purchase Habit Changes : March vs. February 2020

Ave. purchase habit change: Buy more 27; Buy the same amount 53; Buy less 21

Category	Buy more	Buy the same amount	Buy less	INDEX* Buy More	INDEX* Buy Less
Biscuits (n=150)	7	63	30	25	145
Ready-To-Drink Tea (n=148)	9	65	25	34	123
Chocolate drink (n=144)	10	62	28	39	136
Medicine for body pain (n=143)	26	58	15	98	74
Vitamins (n=140)	29	54	17	110	81
Infant milk formula (n=122)	30	58	12	111	60
Beer (n=119)	5	51	45	17	217
Electronic gadgets (n=108)	8	52	40	29	192
Baby food (n=103)	26	56	18	98	89
Have health insurance (n=81)	12	63	24	46	118
Hard liquor / Wine (n=75)	5	46	49	20	237
Cigarettes (n=48)	8	41	51	31	245

Vitamins and infant milk formula are also stocked up at the expense of recreational products such as cigarettes, liquor, beer and electronic gadgets along with biscuits, chocolate drinks and ready-to-drink tea. Health insurance is also deprioritized.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

*Buy more/Buy less Index is % of buy more/less of category divided by average % of buy more/less of all 32 categories ; Above 100 index means higher than average buy more/less % ; Less than 100 index means lower than average buy more/less %

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To measure the BPI of personal activities, IRL takes into account two questions

1. Incidence of doing each of the activities in March 2020
2. Doing frequency perception of each activity (whether do more, do less, do the same) from March vs. February 2020

Indices are made per activity for each question. Index is computed as follows :

- Behavior incidence Index : % of incidence of doing of each activity divided by average of % of incidence of all 30 activities included in the study
- Behavior Frequency Perception Index
    - % of do more Activity A divided by average of % of do more of all 30 activities included in the study
    - % of do less Activity A divided by average of % of do less of all 30 activities included in the study

BPI is computed by combining

- Behavior Incidence Index + Behavior Frequency Perception Index (Do More) to come up with BPI Do More (which activities increased in March 2020)
- Behavior Incidence Index + Behavior Frequency Perception Index (Do Less) to come up with BPI Do Less (which activities declined in March 2020)

Behavior Power Index (BPI) of Personal Activities and Habits During Covid 19 : | Summary

Behavior Incidence and Behavior Frequency Perception (Do More or Do Less) – March 2020 vs. February 2020

Indochina Research

Ranking	BPI DO MORE INCREASING Behavior Power (Penetration X Behavior Frequency – Do More)	BPI DO LESS DECLINING Behavior Power (Penetration X Behavior Frequency – Do Less)
1	Phone top-ups via digital means	Do local travel
2	Have emergency funds/money	Shop for clothes
3	Connect to mobile data	Go to parks/tourist areas
4	Use digital payments	Go to wet market
5	Do on-net calls	Eat-out in restaurants, coffee shops
6	Withdraw money from banks	Shop in local stores
7	Have food delivery by phone	Do local remittance
8	Do online shopping	Ride tuktuk
9	Use cash	Use cash
10	Send on-net SMS	Ride Grab

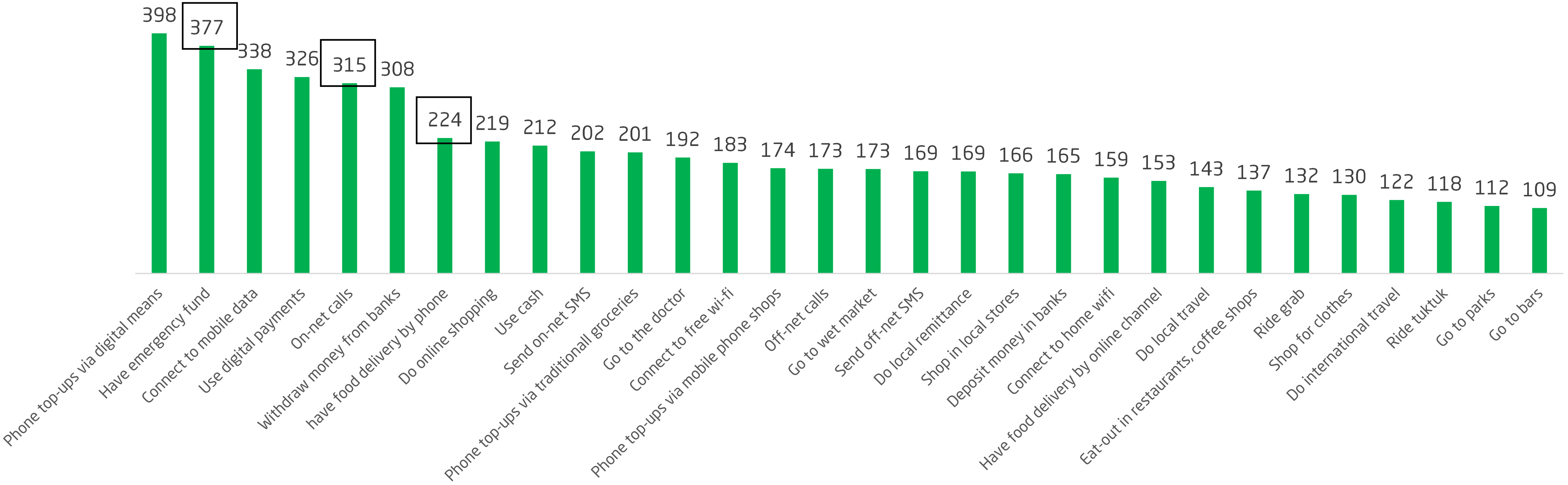
Please see page 20 for the explanation of computation of BPI Do More /BPI Do Less

Meanwhile, there are some changes on Khmers' personal habits as cashless lifestyle and non-personal visits to stores/channels are embraced.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

Behavior Power Index (BPI) of Personal Activities and Habits During Covid 19 : | DO MORE

Behavior Incidence and Behavior Frequency Perception (Do More) – March 2020 vs. February 2020



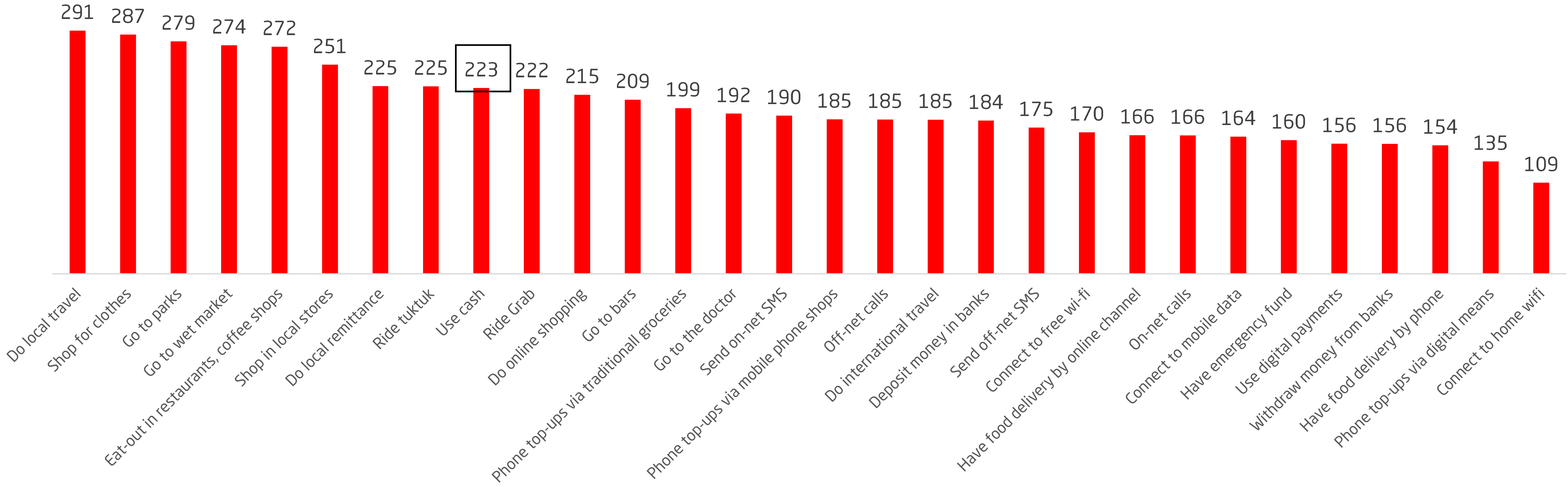
Please see page 20 for the explanation of computation of BPI Do More

In addition to digital transactions, Khmers ensure that there is cash in the house while doing food delivery via phone.
On-net calls are being done for personal connectivity.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

Behavior Power Index (BPI) of Personal Activities and Habits During Covid 19 : | DO LESS

Behavior Incidence and Behavior Frequency Perception (Do Less) - March 2020 vs. February 2020



Please see page 20 for the explanation of computation of BPI Do Less

Conversely, any activity that requires personal visits to shops/channels/stores are done to a lesser extent. Cash is included in both top 10 activities that increased and decreased in March 2020 which signify the spread of doing it more/less (given the increase of incidence of doing digital payments and cash is being kept at homes).

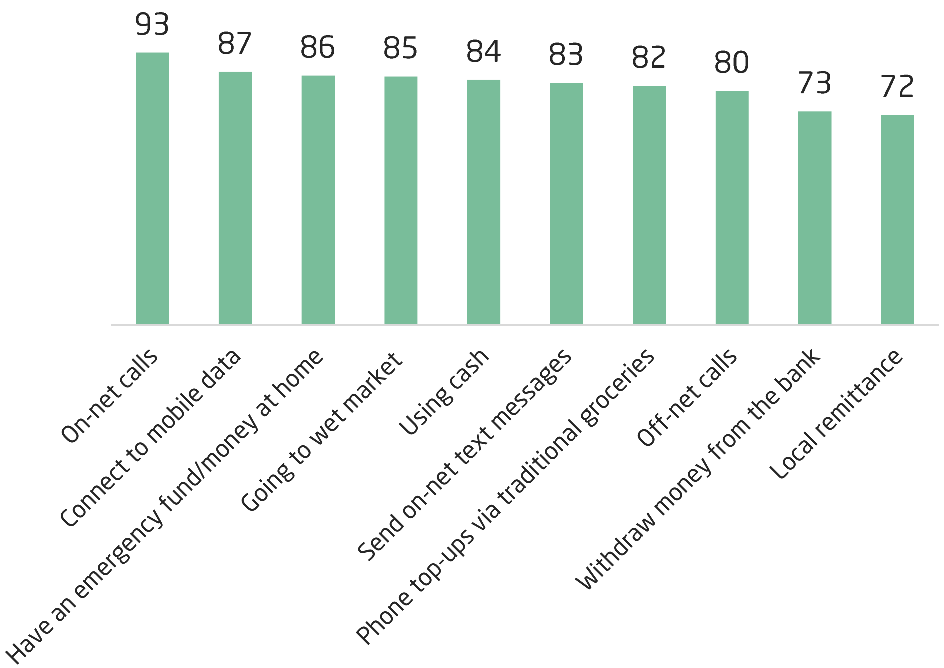
Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

Incidence of Personal Activities and Habit Changes: March vs. February 2020 (i)

Base: All respondents (n=234), in %

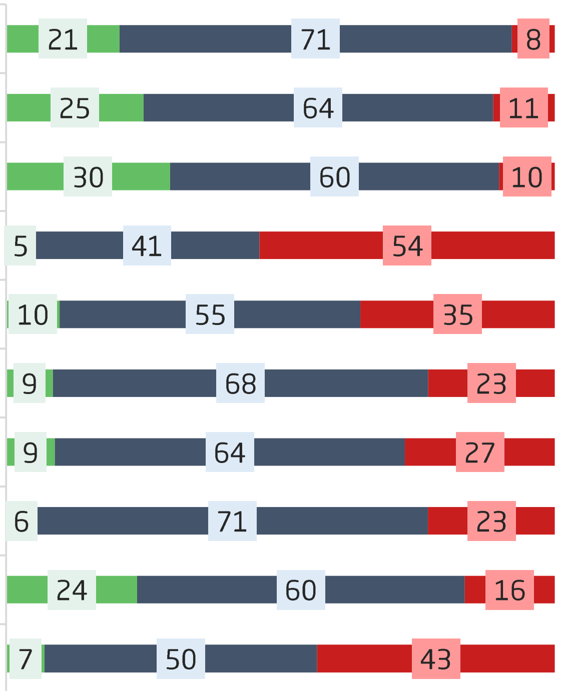
Incidence of Personal Activities : March 2020

Ave. Incidence of Personal Activities: 64



Habit Changes : March vs. February 2020

Ave. habit change: Do more 12; Do the same 49; Do less 38



Activity	Do more	Do the same	Do less	INDEX* Do More	INDEX* Do Less
On-net calls (n=218)	21	71	8	169	21
Connect to mobile data (n=203)	25	64	11	204	29
Have an emergency fund/money at home (n=200)	30	60	10	244	27
Go to wet market (n=199)	5	41	54	42	141
Use cash (n=196)	10	55	35	79	93
Send on-net text messages (n=194)	9	68	23	70	60
Phone top-ups via traditional groceries (n=192)	9	64	27	72	71
Off-net calls (n=187)	6	71	23	46	60
Withdraw money from the bank (n=171)	24	60	16	195	43
Do local remittance (n=168)	7	50	43	57	113

Khmers are using more of telco services like on-net calls and mobile data - to still have connectivity. Likewise, having savings is an essential activity during the pandemic.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

*Do more/do less Index is % of do more/less of activities divided by average % of do more/less of all 30 activities ; Above 100 index means higher than average do more/less % ; Less than 100 index means lower than average do more/less %

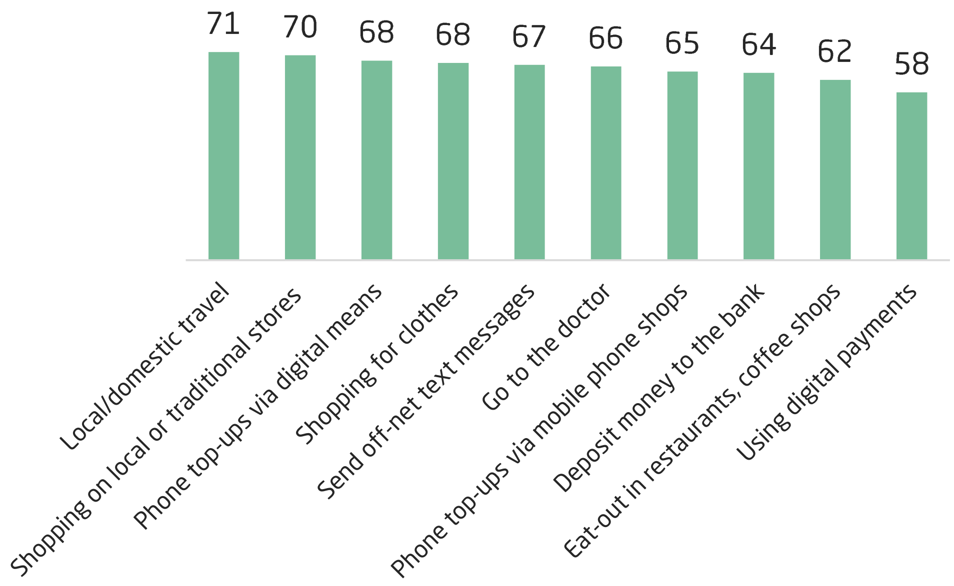
Incidence of Personal Activities and Habit Changes: March vs. February 2020 (ii)

Indochina Research

Base: All respondents (n=234), in %

Incidence of Personal Activities : March 2020

Ave. Incidence of Personal Activities: 64



Habit Changes : March vs. February 2020

Ave. habit change: Do more 12 | Do the same 49 | Do less 38

Activity	Do more	Do the same	Do less	INDEX* Do More	INDEX* Do Less
Do Local/domestic travel (n=167)	4	27	69	29	181
Shop on local or traditional stores (n=164)	7	40	54	55	140
Phone top-ups via digital means (n=160)	36	52	11	296	30
Shop for clothes (n=158)	3	28	69	22	180
Send off-net text messages (n=156)	8	65	27	67	71
Go to the doctor (n=155)	11	55	34	89	89
Phone top-ups via mobile phone shops (n=151)	9	58	32	76	85
Deposit money to the bank (n=150)	8	60	32	64	85
Eat-out in restaurants, coffee shops (n=144)	5	28	67	41	176
Use digital payments (n=134)	29	46	25	233	66

Meanwhile, cashless transaction also registers better incidence of being done while going to brick-and-mortar stores are avoided (again, as part of physical distancing).

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

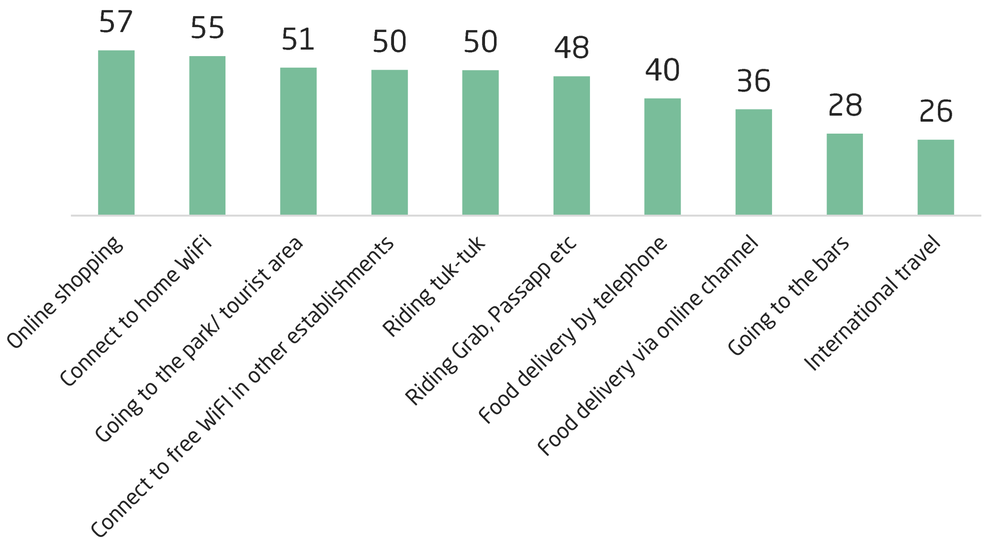
Incidence of Personal Activities and Habit Changes: March vs. February 2020 (iii)

Indochina Research

Base: All respondents (n=234), in %

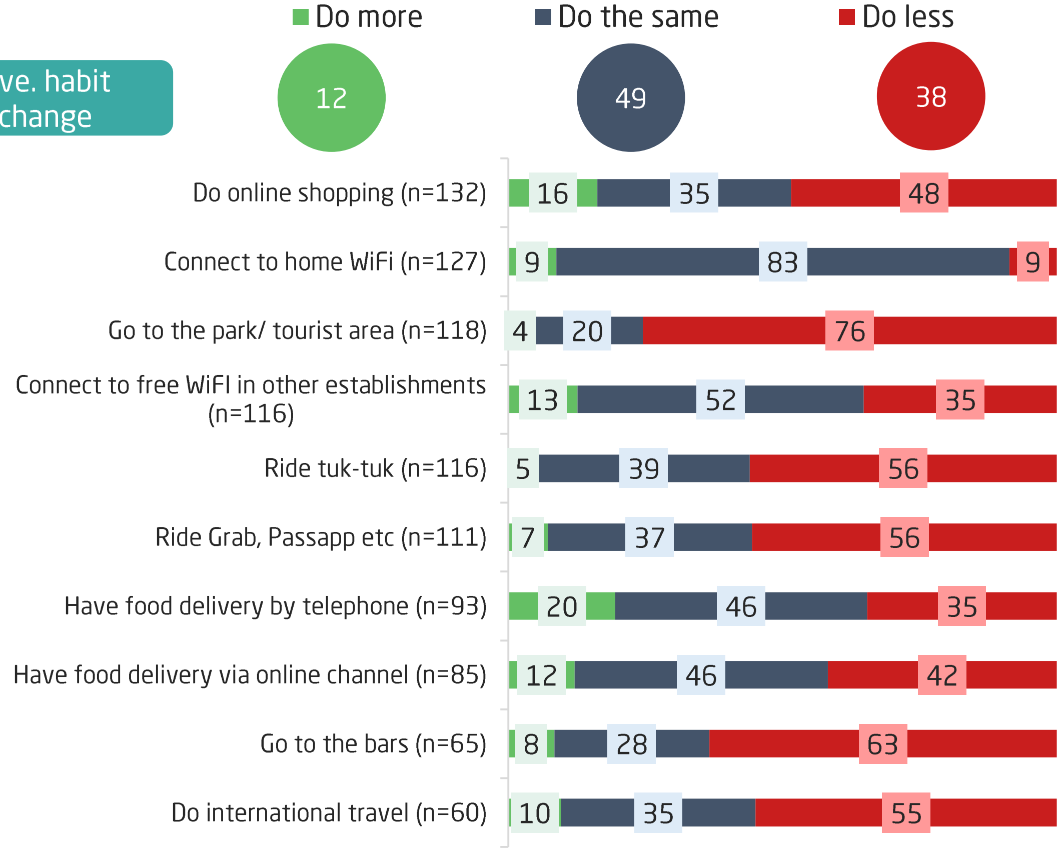
Incidence of Personal Activities : March 2020

Ave. Incidence of Personal Activities: 64



Habit Changes : March vs. February 2020

Ave. habit change

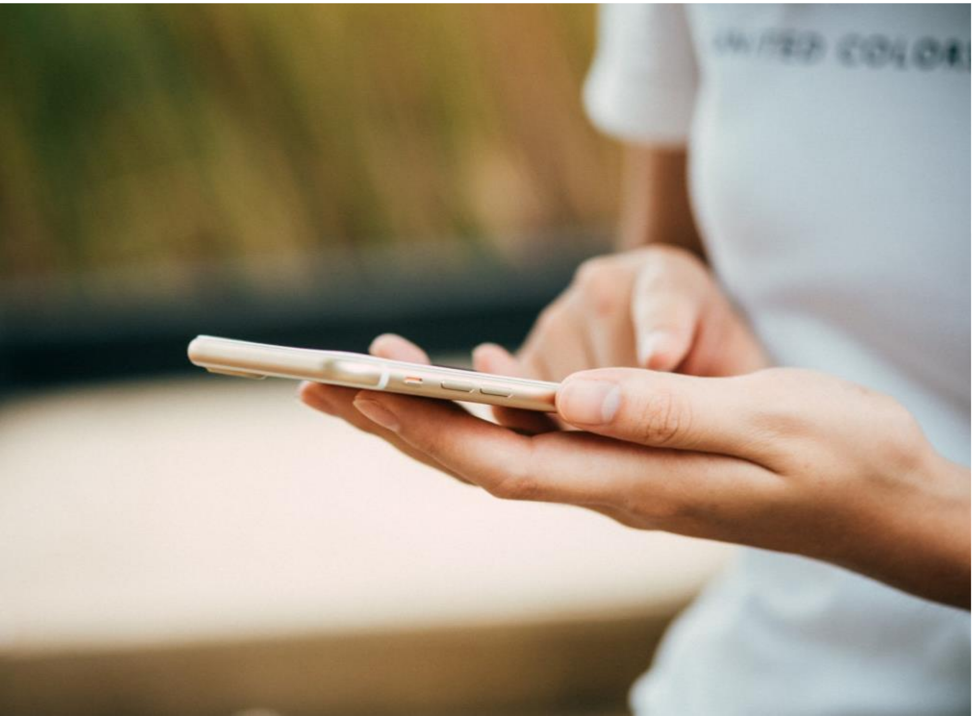


	INDEX*	
	Do More	Do Less
Do online shopping (n=132)	133	127
Connect to home WiFi (n=127)	72	23
Go to the park/ tourist area (n=118)	35	197
Connect to free WiFI in other establishments (n=116)	103	92
Ride tuk-tuk (n=116)	43	146
Ride Grab, Passapp etc (n=111)	58	145
Have food delivery by telephone (n=93)	159	90
Have food delivery via online channel (n=85)	99	109
Go to the bars (n=65)	68	166
Do international travel (n=60)	78	144

Likewise, non-essential recreational activities are sacrificed.

Q18. How has your shopping and personal habits changed in March 2020 as compared to February 2020?

Korean Pop Culture



Penetration of Korean Pop Culture

Base: All respondents (n=234), in %

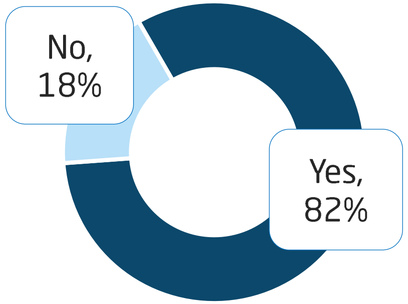
Are you aware of K-Pop?

48% are aware

n=113

	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
Aware	48	44	52	53	45	50	46
Not aware	52	56	48	47	55	50	54

Have you ever watched K-Pop contents?



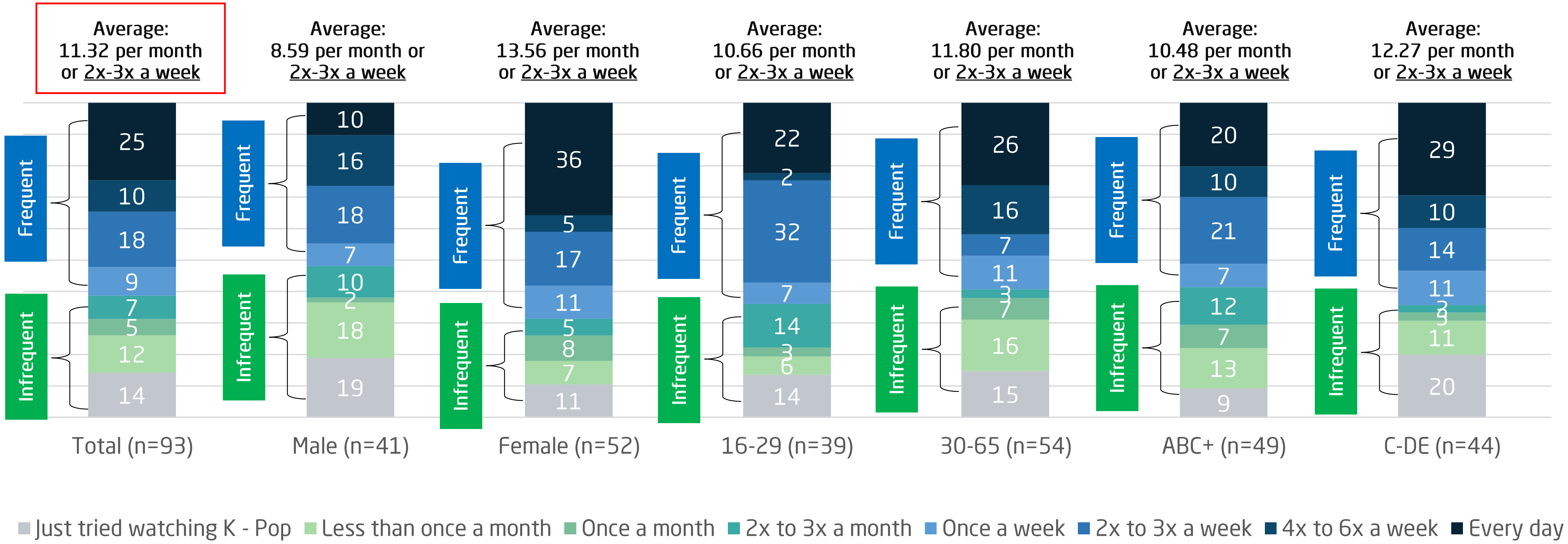
	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=113	n=52 (A)	n=61 (B)	n=45 (C)	n=68 (D)	n=57 (E)	n=56 (F)
Have watched	82	79	85	87	79	86	78
Have not watched	18	21	15	13	21	14	22

K-Pop is generally accepted in Phnom Penh, slightly skewed towards females, younger and higher income.

Q26. Do you know K-POP or Korean Pop (Music, Series and Movies)?
Q27. Have you ever watched K - Pop videos (Music, Series and Movies)?

Frequency of Watching Korean Pop Contents

Base: Among who have watched korean pop contents (n=93), in %



With frequent watching of K-Pop contents (2x-3x a week).

Q26. Do you know K-POP or Korean Pop (Music, Series and Movies)?
Q27. Have you ever watched K - Pop videos (Music, Series and Movies)?

Where Do They Watch Korean Pop Contents

Base: Among who watches korean pop contents at least once a month (n=69), in %

	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=69	n=28* (A)	n=43 (B)	n=32 (C)	n=37 (D)	n=38 (E)	n=30 (F)
Youtube	69	87	58	85 C	55	90 C	43
Facebook	67	65	69	81 C	56	70	64
My TV	34	31	36	33	34	37	30
SBS	14	22	10	20	10	11	19
Soyo	10	11	10	6	14	16	3
Hangmeas	10	10	10	11	9	17 C	1
KBS	8	5	9	16 C	0	8	7
MBC	6	8	5	8	5	5	8
Iflix	6	13	2	8	4	7	4
KNN	5	6	5	1	9	9	1

And with its free access and massive content sharing, Youtube and Facebook are the top channels for K-Pop contents.

*Caution in reading: small base (below n=30)

Q29.1 What TV Stations or Websites do you usually watch K-Pop (Music, Series and Movies)?

Frequency of Watching Korean Pop Contents

Base: Among who watches korean pop contents at least once a month (n=69), in %

3 Phrases that best describe why you watch K-Pop content?

Top K-Pop Artists

Favorite Male K-Pop Artists

Lee Min Ho	28
Rain	16
Song Seung Soon	3
Can't remember the name	12

Favorite Female K-Pop Artists

Park Bom	19
Lisa	8
CL	3
HyunA	3
Park Min Young	3
Can't remember the name	14

Favorite K-Pop Boy Group

BTS	19
Big Bang	8
Shinee	3
Super Junior	3
Can't remember the name	23

Favorite K-Pop Girl Group

Blackpink	24
2ne1	15
Girls' Generation	9
Can't remember the name	23

Having a different concept, interesting story plot and beautiful actors as the main selling points of K-Pop contents.

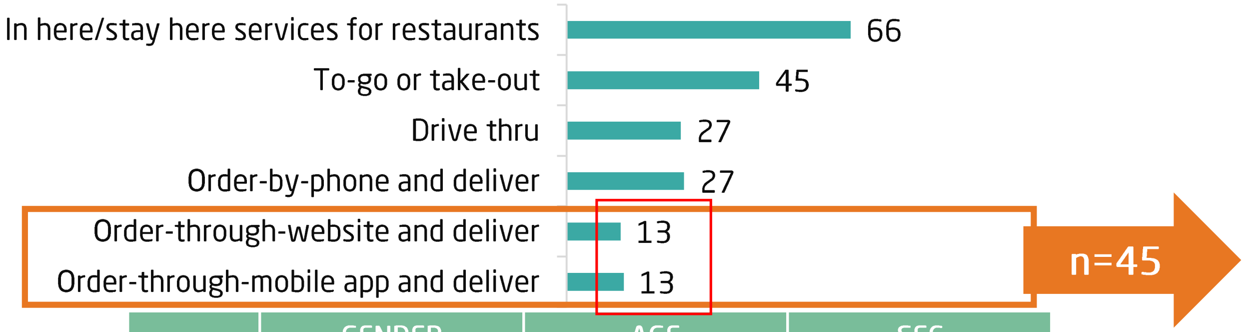
Q29. Please choose 3 words or phrases that best describe why you watch K-Pop (Music, Series and Movies)?


Online Food Delivery

Penetration of Online Food Delivery

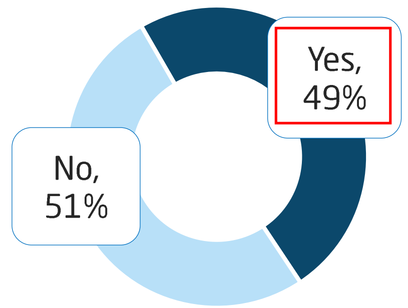
Base: All respondents (n=234), in %

Awareness of Food Services



	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
In here/stay here services for restaurants	66	62	70	63	68	69	64
To-go or take-out	45	40	49	44	46	45	45
Drive thru	27	20	33 A	19	31 C	35 F	19
Order-by-phone and deliver	27	23	32	30	26	38 F	17
Order-through-website and deliver	13	13	12	15	11	21 F	5
Order-through-mobile app and deliver	13	12	15	21 D	9	23 F	4

Have you ever ordered food online?



	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=45	n=20* (A)	n=25* (B)	n=23* (C)	n=22* (D)	n=37 (E)	n=8* (F)
Have tried	49	36	60	51	48	47	61
Have not tried	51	64	40	49	52	53	39

*Caution in reading: small base (below n=30)

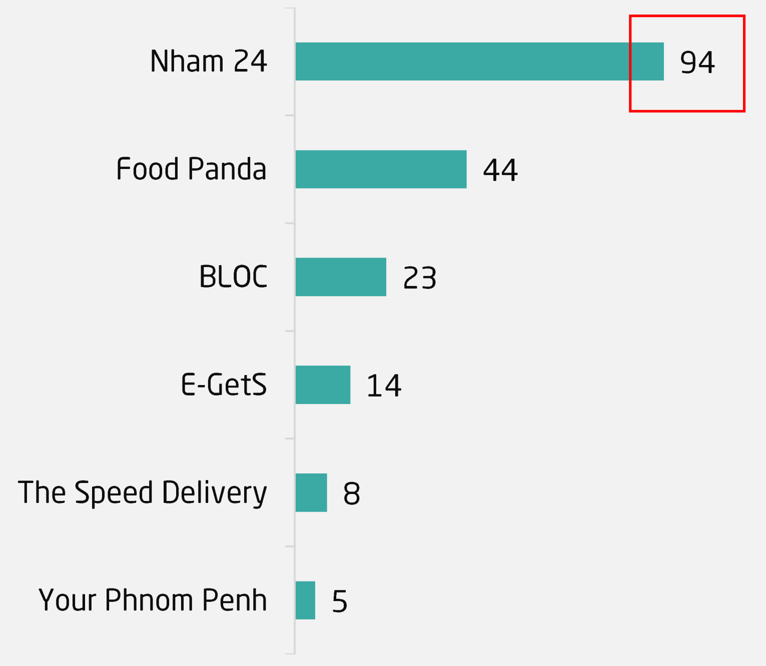
Online food ordering/delivery can still be considered as a relatively young innovation as only 2 out of 5 are aware of that service (skewed towards upper income and younger customers).

Q30. Which among these food services are you aware of?
Q31. Have you ordered food online (though website or mobile app)?

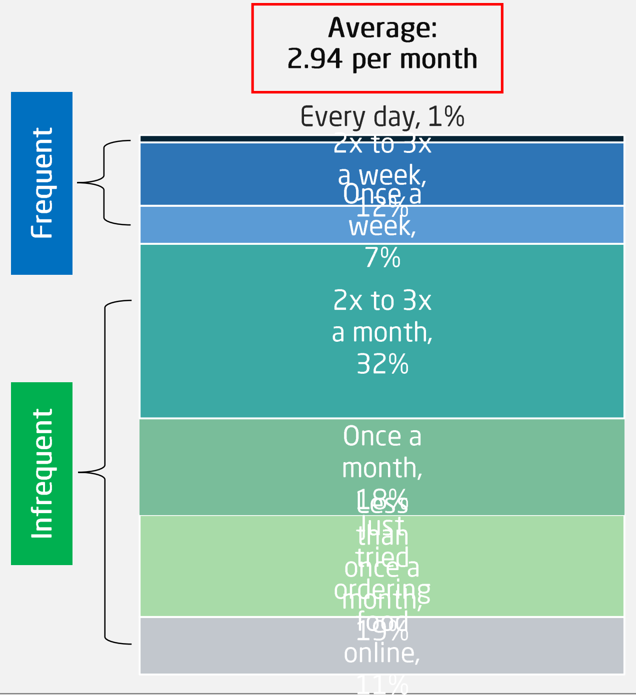
Apps Used For Ordering Food Online and Frequency

Base: Among who tried ordering food online (n=22*), in %

What websites or apps do you use to order food online?



How often do you order food online?



Indicatively, online food delivery is done infrequently (3x per month) with Nham 24 taking a lion share.

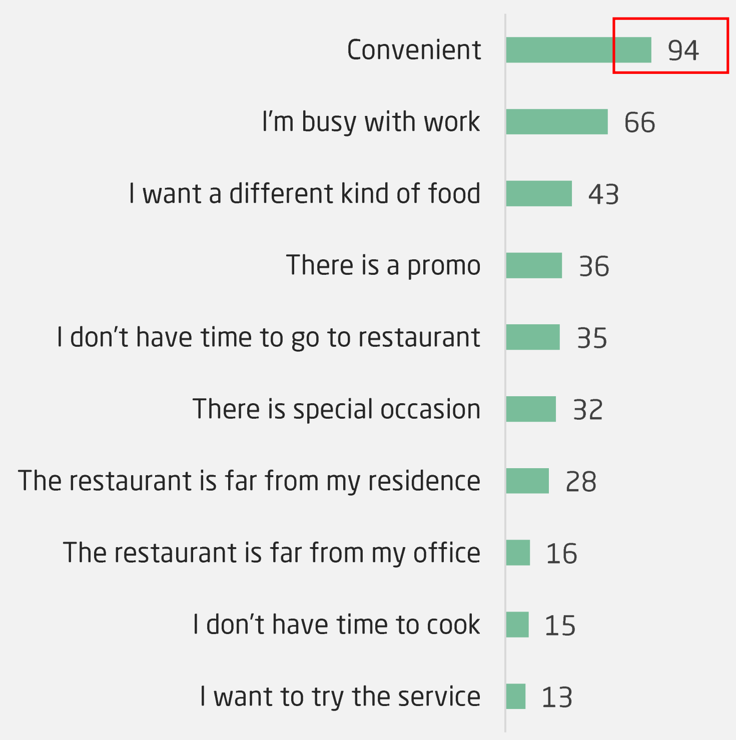
*Caution in reading: small base (below n=30)

Q31.2 What websites or apps do you use to order food online?
Q32. How often do you order food online (through website and/or mobile app)?

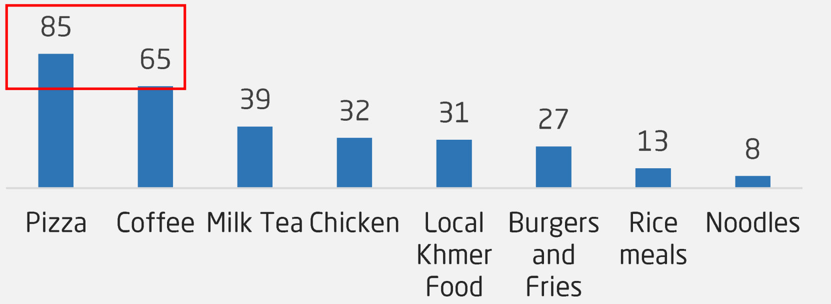
Habits on Ordering Food Online

Base: Among who orders food online at least once a month (n=16*), in %

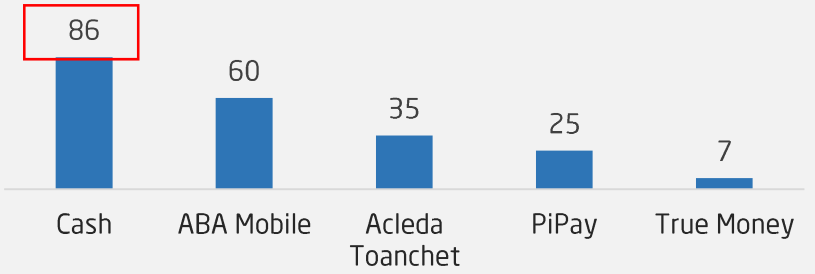
3 Phrases that best describe why you order food online?



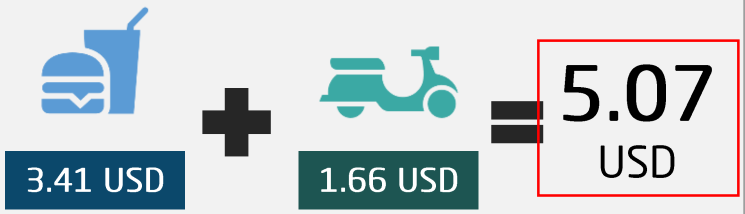
What food do you usually order via online food delivery?



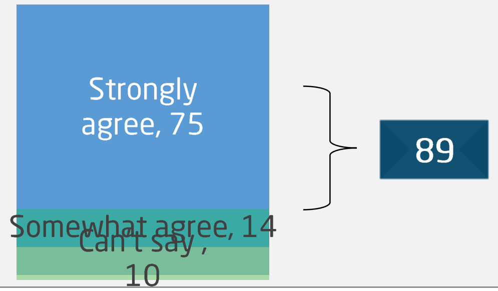
How do you pay for your order via online food delivery?



Average spending for ordering food online



How strongly do you agree or disagree that there should be a minimum amount to avail of delivery service?

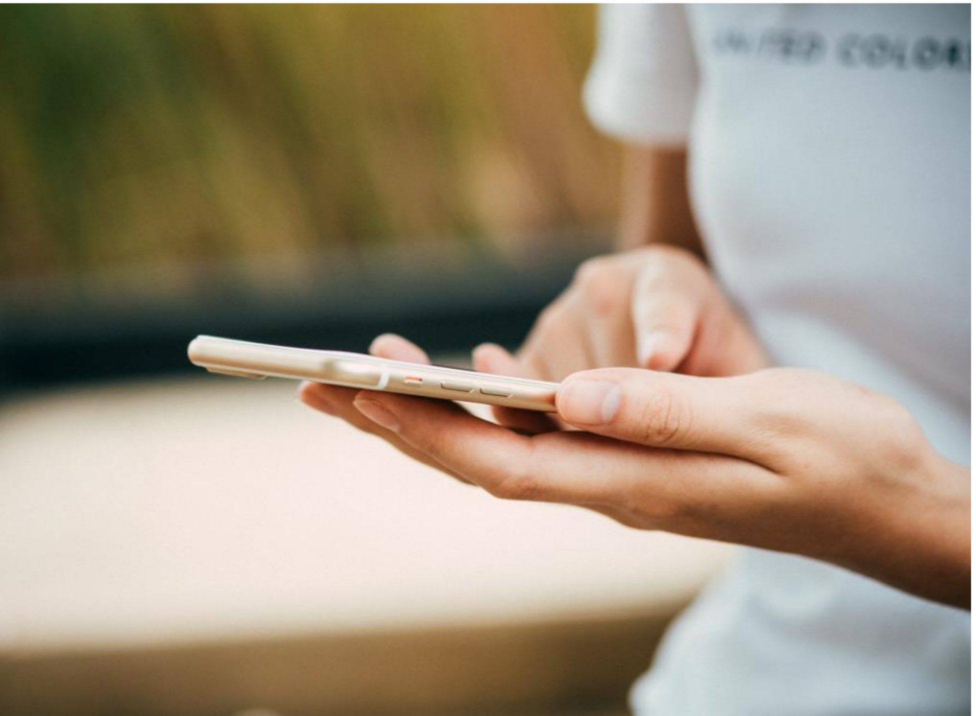


As an indication, convenience is the main trigger for online food delivery of mainly pizza and coffee (and hence, average amount per transaction is USD5 which is paid largely via cash).

*Caution in reading: small base (below n=30)

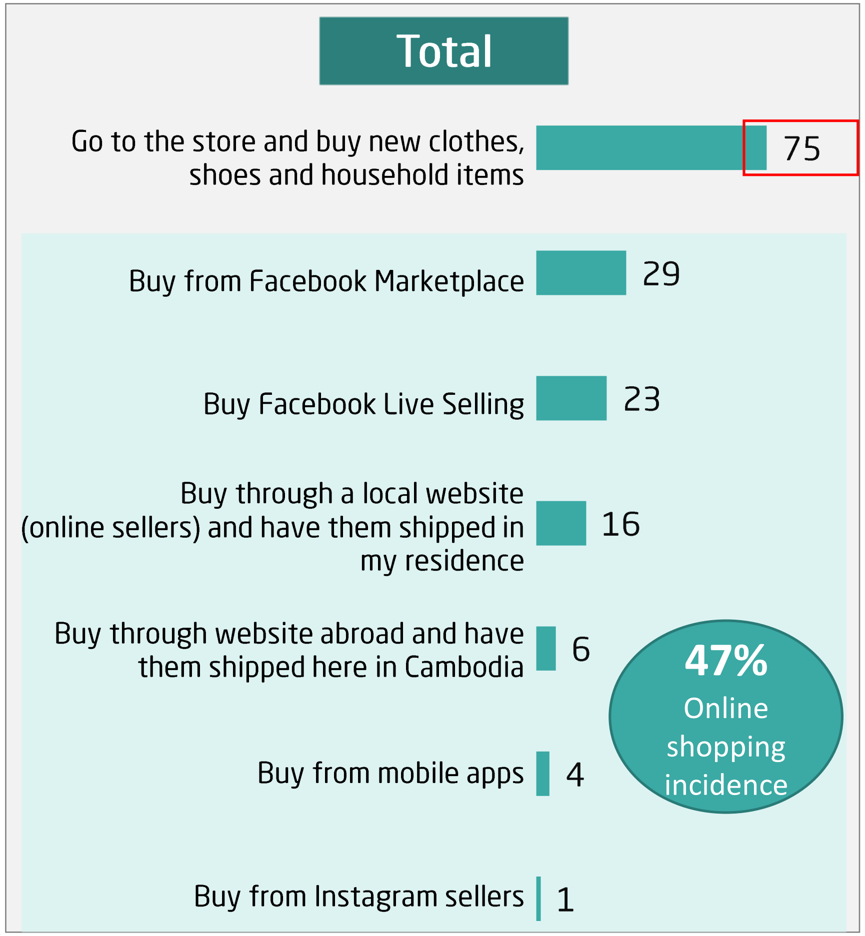
Q33. Please choose 3 phrases below that best describe why you order food online (website or mobile app)
Q34. What type of food do you usually order on online food delivery?
Q35. Based on you last order, how much do you spend on your food delivery?
Q36. How strongly do you agree or disagree that there should be a minimum amount to avail of delivery service?
Q42.4 What modes of payment do you use for food delivery


Online Shopping



Usual Ways of Doing Shopping

Base: All respondents (n=234), in %



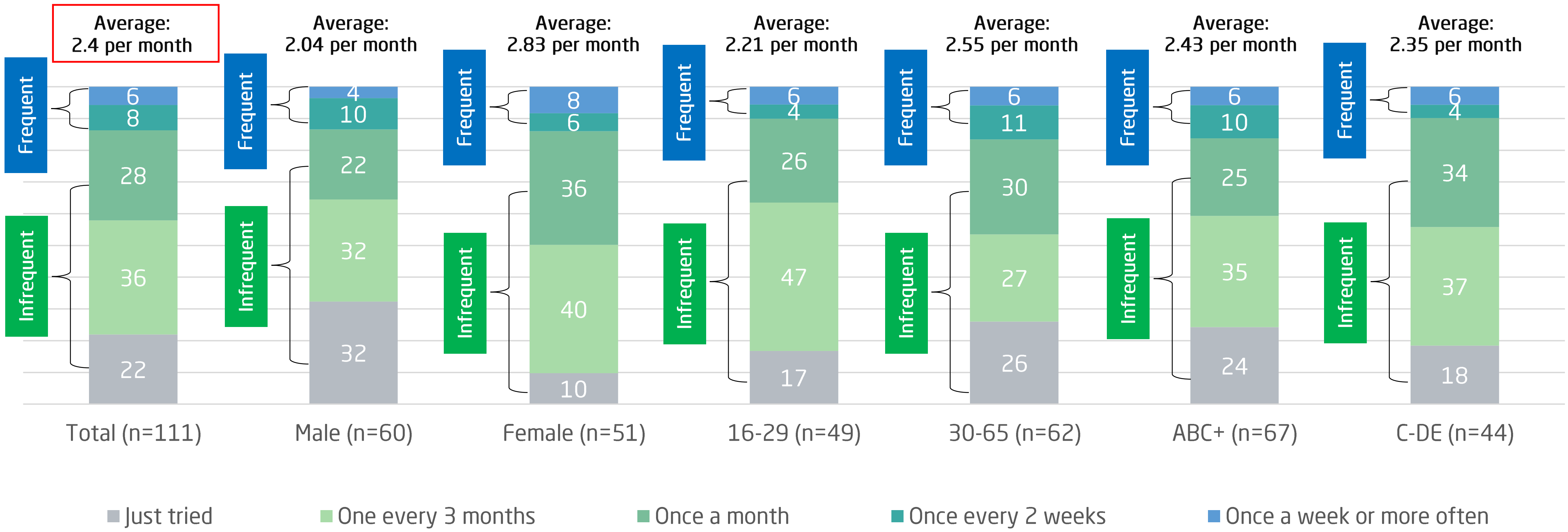
	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
Go to the store and buy new clothes, shoes and household items	75	71	80	67	80 C	69	82 E
Buy from Facebook Marketplace	29	31	27	33	27	33	26
Buy Facebook Live Selling	23	19	27	20	25	33 F	14
Buy through a local website (online sellers) and have them shipped in my residence	16	14	18	16	16	24 F	9
Buy through website abroad and have them shipped here in Cambodia	6	7	6	12 D	3	9	4
Buy from mobile apps	4	6	3	8 D	2	8 F	1
Buy from Instagram sellers	1	0	3	4	0	3	0

Brick-and-mortar is still the king as a shopping channel but online shopping is gaining traction in Phnom Penh especially among the younger group and higher SEC households.

Q37. Which of the following have you done in terms of shopping for your clothes, shoes and household items?

Frequency of Shopping Online

Base: Among who buys item online (n=111), in %

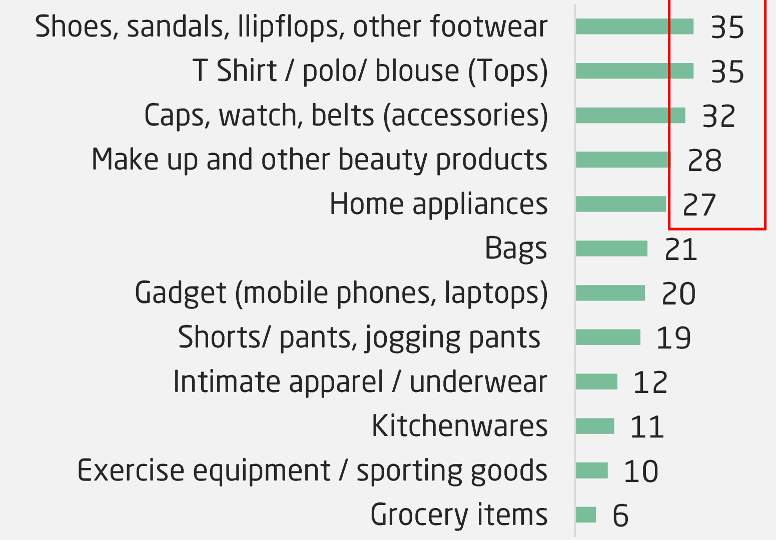


With an infrequent online shopping frequency per month.

Q39. How often do you order clothes, shoes and other household items online?

Items Bought Online

Base: Among who buys item online (n=111), in %



Average amount spent on last item bought online

31.25 USD

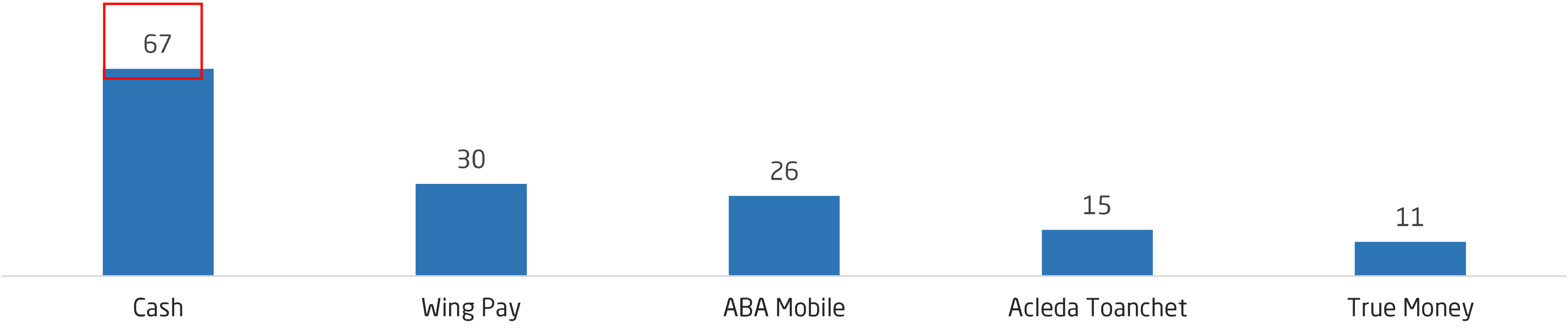
	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=111	n=60 (A)	n=51 (B)	n=49 (C)	n=62 (D)	n=67 (E)	n=44 (F)
Shoes, sandals, flipflops, other footwear	35	28	42	28	40	35	33
T Shirt / polo/ blouse (Tops)	35	32	38	36	34	38	30
Caps, watch, belts (accessories)	32	31	34	29	35	31	34
Make up and other beauty products	28	10	50 A	33	24	32	22
Home appliances	27	27	26	28	25	33 F	16
Bags	21	10	34 A	18	24	24	18
Gadget (mobile phones, laptops)	20	21	19	18	22	23	16
Shorts/ pants, jogging pants	19	24	14	19	20	23	13
Intimate apparel / underwear	12	11	14	8	16	18 F	4
Kitchenwares	11	9	14	8	14	15	5
Exercise equipment / sporting goods	10	14	4	14	6	11	7
Grocery items	6	4	9	6	6	7	4
Average number of items bought online	2.56	2.21	2.97	2.44	2.65	2.91	2.03

Given that on the average, the online shoppers are buying 3 personal items with USD31.

Q38. What are the items have you tried buying online?

How Did They Pay For The Items Bought Online?

Base: Among who buys item online (n=111), in %



	Apps/Website Used				
	Facebook	Nham24	Zando	Instagram	MyPhsar
Weighted Base	n=96	n=24*	n=16*	n=9*	n=7*
Cash	68	73	55	87	74
Wing Pay	26	30	34	17	20
ABA Mobile	24	39	32	37	0
Acleda Toanchet	12	24	40	21	25
TrueMoney	11	14	1	13	26

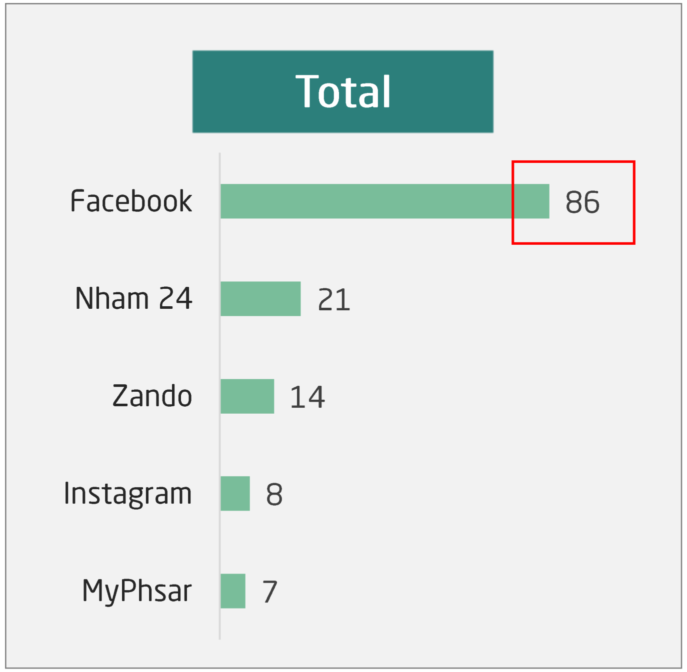
Which is largely paid in cash.

*Caution in reading: small base (below n=30)

Q37.1 What websites or apps do you use to purchase clothes, shoes and other household items?
Q42.4 What modes of payment do you use for shopping online?

Apps/Website Used to Buy Items Online

Base: Among who buys item online (n=111), in %



	Apps/Website Used				
	Facebook	Nham24	Zando	Instagram	MyPhsar
Weighted Base	n=96	n=24*	n=16*	n=9*	n=7*
Shoes, sandals, flipflops, other footwear	37	34	38	35	49
T Shirt / polo/ blouse (Tops)	35	36	45	35	49
Caps, watch, belts (accessories)	37	28	50	75	40
Make up and other beauty products	29	31	13	37	51
Home appliances	27	27	42	46	49
Bags	23	16	32	25	24
Gadget (mobile phones, laptops)	19	25	33	15	0
Shorts/ pants, jogging pants	19	22	28	51	44
Intimate apparel / underwear	13	30	36	40	49
Kitchenwares	12	20	17	14	27
Exercise equipment / sporting goods	10	11	15	27	20
Grocery items	6	9	0	0	8

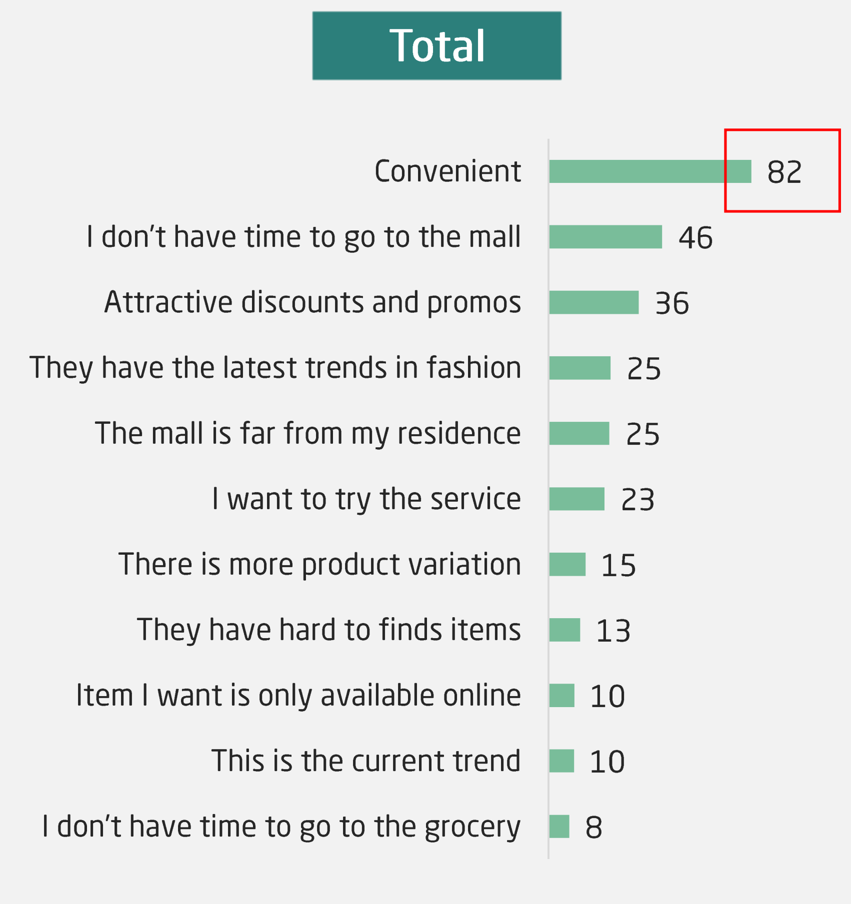
And Facebook is the main online shopping channel.

*Caution in reading: small base (below n=30)

Q37.1 What websites or apps do you use to purchase clothes, shoes and other household items?
Q38. What are the items have you tried buying online?

Why Do They Buy Items Online?

Base: Among who buys item online (n=111), in %



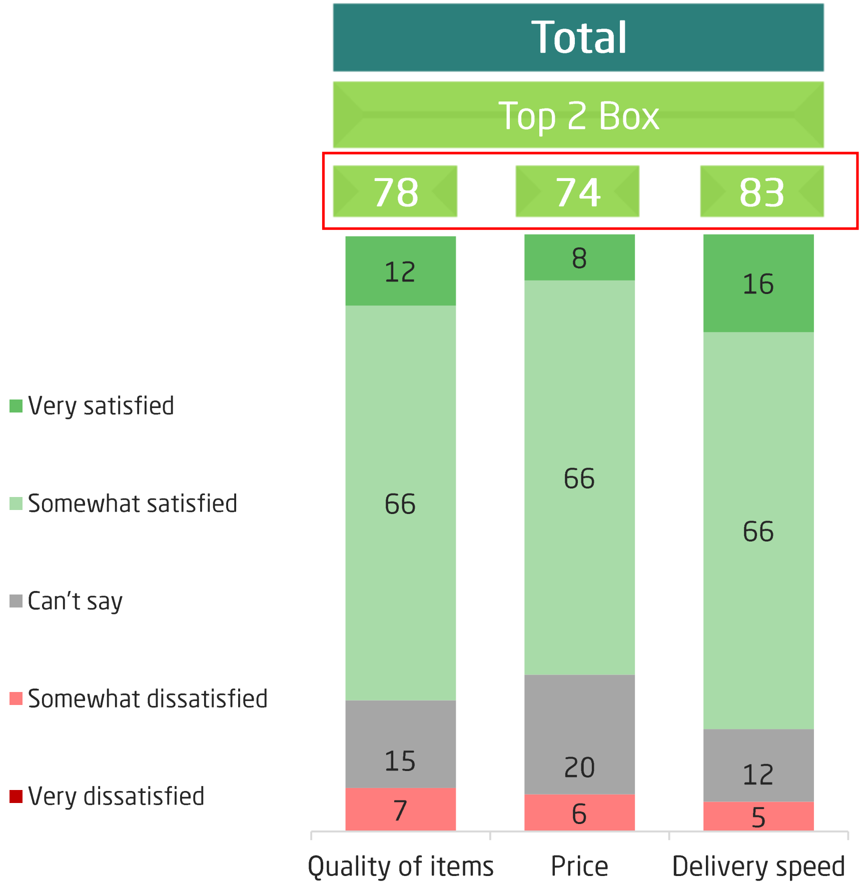
	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=111	n=60 (A)	n=51 (B)	n=49 (C)	n=62 (D)	n=67 (E)	n=44 (F)
Convenient	82	85	78	83	81	89	71 E
I don't have time to go to the mall	46	52	39	46	46	54	33 E
Attractive discounts and promos	36	25	50 A	36	37	33	42
They have the latest trends in fashion	25	15	36 A	18	31	21	31
The mall is far from my residence	25	38 B	9	29	21	24	26
I want to try the service	23	19	27	16	27	15	34 E
There is more product variation	15	7	25 A	18	13	12	19
They have hard to finds items	13	12	13	12	14	16	7
Item I want is only available online	10	14	6	13	8	10	10
This is the current trend	10	12	8	9	12	5	19 E
I don't have time to go to the grocery	8	12	4	10	7	12	3

And hence, the online shopping experience is deemed to be a convenient experience.

Q40. Please choose 3 phrases below that best describe why you bought clothes, shoes and other household items online?

Satisfaction Towards Online Shopping Experience

Base: Among who buys item online (n=111), in %



		Apps/Website Used				
		Facebook	Nham24	Zando	Instagram	MyPhsar
	Weighted Base	n=96	n=24*	n=16*	n=9*	n=7*
Quality of items	Very satisfied	13	2	0	2	0
	Somewhat satisfied	63	63	88	77	51
	Can't say	15	27	12	21	49
	Somewhat satisfied	8	9	0	0	0
	Very dissatisfied	0	0	0	0	0
Price	Very satisfied	7	7	9	2	0
	Somewhat satisfied	66	54	78	77	51
	Can't say	21	35	13	21	49
	Somewhat satisfied	6	4	0	0	0
	Very dissatisfied	0	0	0	0	0
Delivery speed	Very satisfied	16	18	27	46	29
	Somewhat satisfied	69	42	71	54	47
	Can't say	10	29	1	0	25
	Somewhat satisfied	5	11	0	0	0
	Very dissatisfied	0	0	0	0	0

Given that online shoppers are generally satisfied with it.

*Caution in reading: small base (below n=30)

Q37.1 What websites or apps do you use to purchase clothes, shoes and other household items?
Q42.1. Please describe how satisfied are with the speed of delivery of items that you ordered online.
Q42.2. Please describe how satisfied are you with the price of items that you ordered online
Q42.3. Please describe how satisfied are you with the quality of items that you ordered online.

Indochina Research

Thank you!

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