

IRL Hotspot Survey Cambodia

Quantitative Lifestyle Study During Covid-19

Wave 2 (June 2020) | Report

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CAMBODIA • LAOS • MYANMAR • VIETNAM

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



- 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

REPORT FLOW

1

Research Overview

What do we want to achieve? How did we do the study?

2

Key Findings

What are the key information and insights?

3

Learnings and Implications

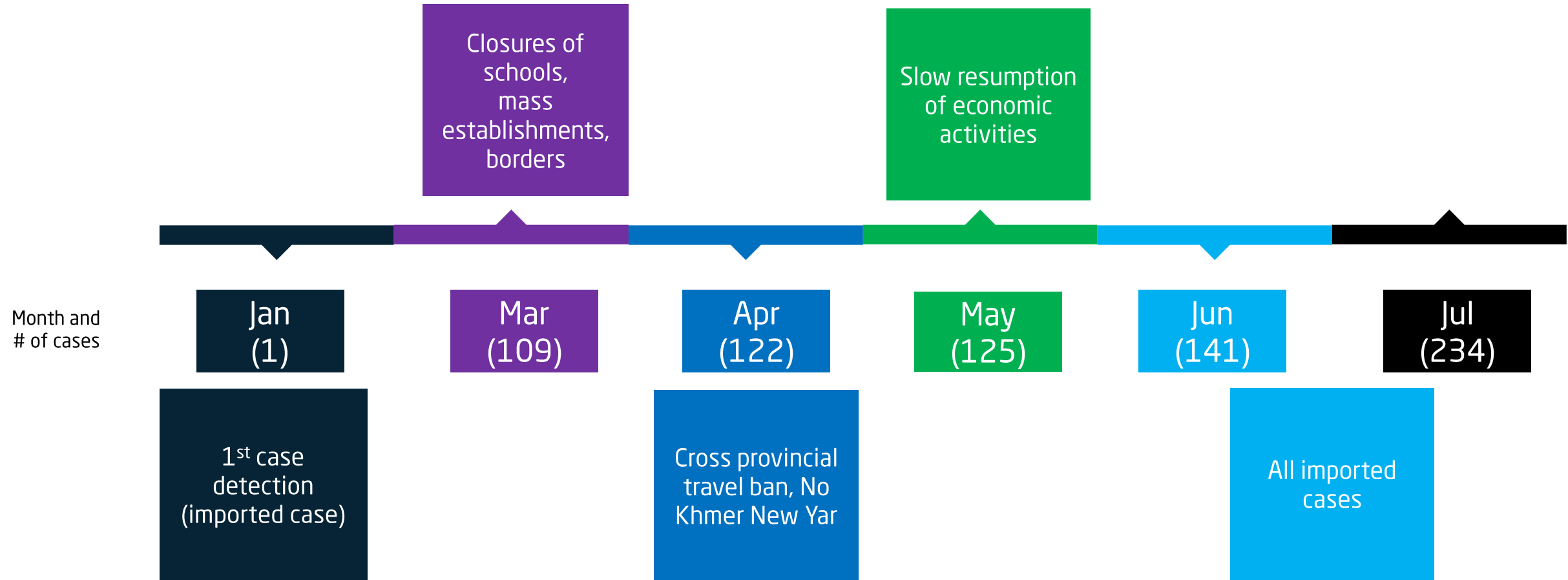
How do we move forward?



BACKGROUND OVERVIEW

OVERVIEW | TIMELINE OF COVID-19 IN CAMBODIA | 2020

RECENT UPDATES (Aug 3, 2020)	
# of confirmed cases	240
# of recoveries	197 (82%)
# of deaths	0





This is a self-funded research by IRL KH



- How does the pandemic change the consumption habits and social behavior of Phnom Penh residents?
- Which product categories and social habits have gains and losses in terms of penetration and frequency during this pandemic?



RESEARCH METHODOLOGY

Quantitative Lifestyle Study via IRLBlast (branded solution of IRL for online survey)

- Via structured questionnaire in Khmer using Qualtrics as the data collection software
- Survey link are sent via SMS using respondent databases of IRLPanel and mobile phone database of mobile phone service providers in Cambodia as well as in Facebook

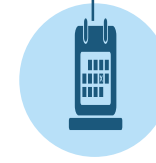


RESPONDENT CRITERIA

Phnom Penh, Cambodia

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

Data weights are applied in the study in terms of demographics (gender, age and SEC) to make the study results representative of the population of Phnom Penh residents



FIELDWORK PERIOD AND SAMPLE SIZE

PROVINCE	SAMPLE SIZE	
	WAVE 1 W1	WAVE 2 W2
Sample Size	234	205
Margin of error*	+ or - 6%	+ or - 7%
Fieldwork Dates	April 2 -10, 2020	June 1 - 11 2020
Reference Period	Feb vs. Mar	May vs. Mar

**At 95% confidence level*

NOTES IN READING THE DATA

SIGNIFICANCE TESTING



Significantly Higher vs. last Wave 1/W1 at 95% confidence level



Significantly Lower vs. last Wave 1/W1 at 95% confidence level

DATA CAVEAT

- Sample size of at least $n=30$ is still statistically 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.





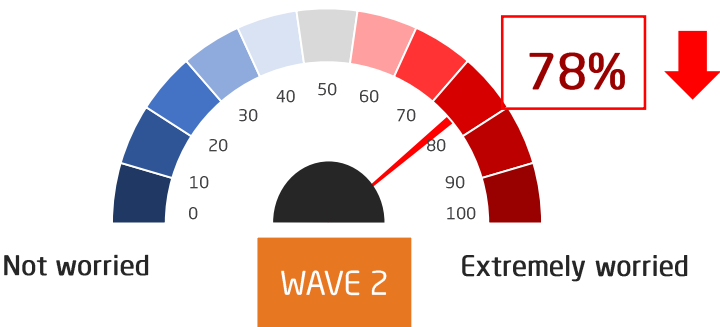
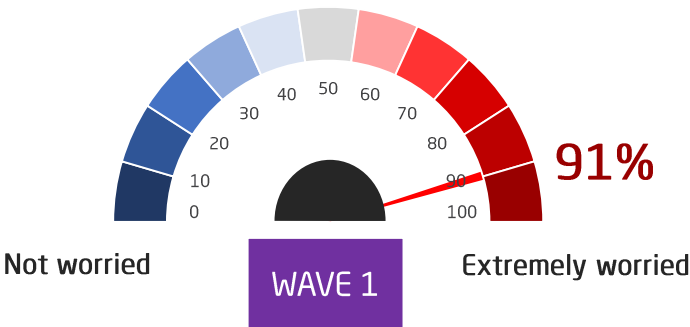
KEY FINDINGS

KEY FINDINGS

*Covid 19
Attitudes and
Behavior*

Disposition During COVID-19

Base: All respondents (wave 1 n=234 vs. wave 2 n=205), in %

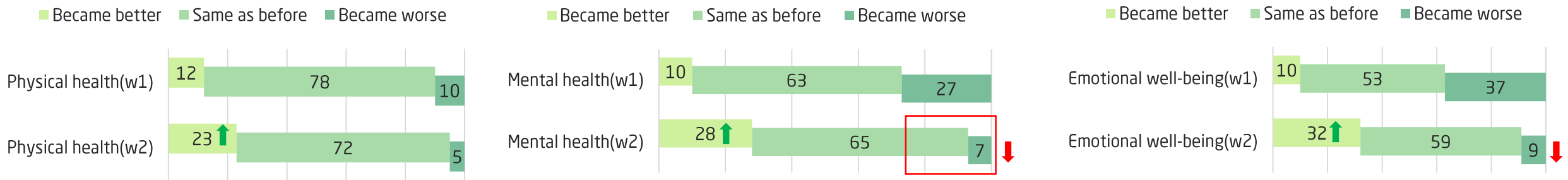


	TOTAL		GENDER				AGE				SEC			
			Male		Female		16-29		30-65		ABC+		C-DE	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
Weighted Base	234	205	117	103	117	102	84	74	150	131	113	99	121	106
Extremely worried	91	78↓	88	70↓	95	87	89	76	93	79↓	93	73↓	90	83
Somewhat worried	7	22↑	9	30↑	5	13	10	24↑	6	21	6	27↑	9	17
Not worried	1	0	2	0	0	0	0	0	1	0	0	0	1	0
Not sure	1	0	1	0	0	0	1	0	0	0	1	0	0	0

People are still worried but to a much lesser degree in Wave 2, more seen among males, mature and higher income class.

Health Condition During COVID-19

Base: All respondents (wave 1 n=234 vs. wave 2 n=205), in %



		TOTAL		GENDER				AGE				SEC			
				Male		Female		16-29		30-65		ABC+		C-DE	
		w1	w2	w1	w2	w1	w2	w1	w2	w1	w2	w1	w2	w1	w2
Weighted Base		234	205	117	103	117	102	84	74	150	131	113	99	121	106
Physical Health	Better	12	23↑	13	20	12	27↑	17	24	10	23↑	11	25↑	13	21
	Same as before	78	72	82	75	74	69	82	73	76	71	83	72	74	72
	Worse	10	5	5	5	14	4↓	2	3	14	6↓	6	3	13	7
Mental Health	Better	10	28↑	13	28↑	7	29↑	13	21	9	32↑	7	4	13	27↑
	Same as before	63	65	64	62	62	67	73	74	57	60	66	67	60	63
	Worse	27	7↓	23	10↓	31	4↓	14	5	34	8↓	27	29	27	10↓
Emotional well-being	Better	10	32↑	13	28↑	6	36↑	11	28↑	8	34↑	7	32↑	13	31↑
	Same as before	53	59	52	65	55	54	67	64	46	57	58	61	49	58
	Worse	37	9↓	35	7↓	39	10	22	8↓	46	9↓	35	7↓	38	11↓

And generally, health conditions of residents get better in Wave 2 with emotional and mental health improving a lot.

Q16.1. How has your physical health changed in Mar/ May 2020 due to news about Corona Virus or COVID 19, if at all?
Q16.2. How has your mental health changed in Mar/ May 2020 due to news about Corona Virus or COVID 19, if at all?
Q16.3. How has your emotional well-being changed in Mar/ May 2020 due to news about Corona Virus or COVID 19, if at all?

Sources of Information About COVID-19

Base: All respondents (wave 1 n=234 vs. wave 2 n=205), in %

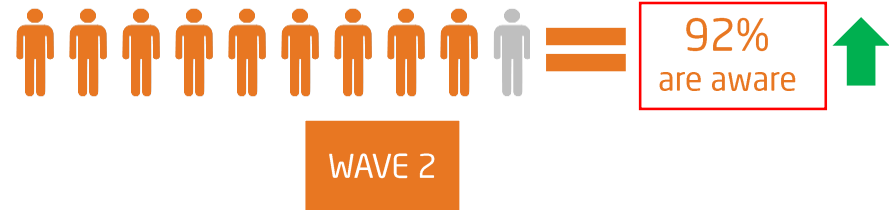
	TOTAL		GENDER				AGE				SEC			
			Male		Female		16-29		30-65		ABC+		C-DE	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
Weighted Base	234	205	117	103	117	102	84	74	150	131	113	99	121	106
Online / Social Media	92	86	93	86	91	86	92	85	92	87	97	85	87	78
Facebook	88	78	89	79	88	77	90	77	87	78	93	79	84	76
Youtube	32	25	31	23	33	26	38	24	29	25	39	20	25	29
Twitter	2	2	2	2	2	1	6	3	0	1	2	2	2	1
Instagram	5	5	5	5	4	4	6	8	4	2	5	4	4	5
News Outlets' Websites	31	28	36	26	26	30	36	30	28	27	38	31	24	26
Newsfeeds	11	30	11	29	10	30	11	21	10	34	11	19	10	39
Tiktok	5	2	6	1	4	3	6	1	5	2	6	0	4	4
Government / NGO	65	81	76	83	54	79	71	78	61	83	70	83	60	80
Ministry of Health of Cambodia	52	67	63	67	41	67	57	68	49	66	58	75	46	60
World Health Organization	31	45	35	43	27	48	34	45	29	45	37	54	25	37
Government Office Website	27	35	35	39	18	31	33	35	23	35	32	34	22	37
Local Officials	26	16	26	13	25	19	25	16	26	16	32	14	19	18
Roving Public Announcements via Vehicles	25	23	26	20	23	25	21	17	26	26	30	18	19	28
Pasteur Institute	11	10	11	12	11	8	7	15	13	8	12	13	10	8
Word-of-Mouth	64	47	66	44	63	49	58	35	68	53	67	43	61	50
Family	43	31	43	28	42	34	44	27	42	33	50	36	36	26
Friends	53	34	54	32	53	37	49	27	56	38	60	33	48	35
Officemates	42	25	48	24	36	26	33	13	47	31	48	23	36	26
Traditional Media	57	50	63	54	51	47	60	56	55	47	60	54	54	47
TV	54	46	57	47	51	44	59	50	51	43	58	45	51	46
Radio	15	17	19	15	12	20	11	15	18	19	15	19	16	16
Newspaper	3	13	4	19	2	6	4	14	2	11	3	13	4	12
Text messages from MSP	24	27	27	29	20	26	21	23	25	29	28	23	20	31
Average no. of information sources	5.78	5.57	6.26	5.52	5.29	5.63	5.91	5.30	5.70	5.73	6.56	5.55	5.05	5.59

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

As residents are getting more Covid 19 information from more trustworthy sources and less on social media and second-hand info channels.

Awareness About Physical Distancing

Base: Base: All respondents (wave 1 n=234 vs. wave 2 n=205), in %

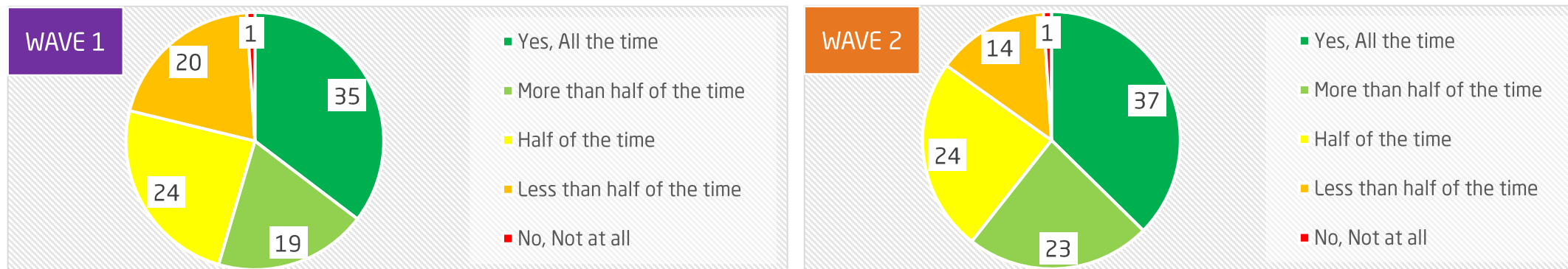


	TOTAL		GENDER				AGE				SEC			
			Male		Female		16-29		30-65		ABC+		C-DE	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
Weighted Base	234	205	117	103	117	102	84	74	150	131	113	99	121	106
Aware	84	92↑	94	93	73	90↑	86	88	82	93↑	79	89	88	93
Not aware	16	8↓	6	7	27	10↓	14	12	18	7↓	21	11	12	7

With more exposure on trustworthy information sources, awareness on social distancing becomes almost universal.

Whether Physical Distancing is Being Practiced PERSONALLY

Base: Base: All respondents (wave 1 n=234 vs. wave 2 n=205), in %



	TOTAL		GENDER				AGE				SEC			
			Male		Female		16-29		30-65		ABC+		C-DE	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
Weighted Base	234	205	117	103	117	102	84	74	150	131	113	99	121	106
NET: More than half	55	60	61	58	49	62	64	69	51	56	58	59	52	63
Yes, all the time	35	37	38	33	33	41	41	41	33	35	35	32	36	43
More than half of the time	19	23	23	25	16	21	23	28	18	21	23	27	16	20
Half of the time	24	24	19	26	29	22	20	21	26	26	25	23	23	26
NET: Less than half	21	15	20	15	23	15	18	9	23	18	17	19	25	12
Less than half of the time	20	14	18	13	23	15	17	8	22	17	17	17	23	11
No, not at all	1	1	2	2	0	0	1	1	1	1	0	2	2	1

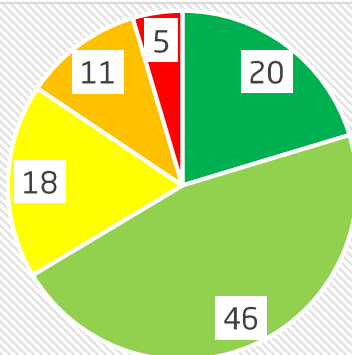
However, 100% social distancing remains not practiced as only a third of the residents do this.

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?

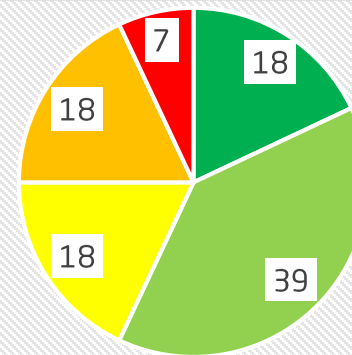
Whether Social / Physical Distancing is Being Practiced By OTHER PEOPLE

Base: All respondents (wave 1 n=234 vs. wave 2 n=205), in %

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



- All or almost all
- Majority
- Half of them
- Less than half of them
- None or nearly none



- All or almost all
- Majority
- Half of them
- Less than half of them
- None or nearly none

	TOTAL		GENDER				AGE				SEC			
	W1	W2	Male		Female		16-29		30-65		ABC+		C-DE	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
Weighted Base	234	205	117	103	117	102	84	74	150	131	113	99	121	106
NET: More than half	66	57	66	53	67	60	77	64	60	52	69	52	63	61
All or almost all	20	18	20	15	21	20	22	17	19	18	21	14	19	21
Majority	46	39	46	38	46	40	55	47	41	35	48	38	44	40
Half of them	18	18	17	21	19	16	14	20	20	17	18	22	18	15
NET: Less than half	16	25	18	26	13	24	9	15	20	31	13	26	18	24
Less than half of them	11	18	14	19	8	17	5	13	15	21	8	19	14	17
None or nearly none	5	7	4	7	5	7	4	2	5	10	5	7	4	7

And 100% social distancing is also not being done by other people.

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?

Awareness About Physical Distancing and Its Purpose

Base: All respondents (wave 1 n=234 vs. wave 2 n=205), in %

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	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
Weighted Base	234	205	117	103	117	102	84	74	150	131	113	99	121	106
NET: Effective	84	84	84	82	84	87	91	90	80	81	81	82	88	86
Very effective	34	30	38	27	30	34	38	27	32	32	30	20	38	40
Effective	50	54	46	55	54	53	53	63	48	49	51	62	50	46
Can't say	15	14	14	16	15	13	7	9	19	17	17	15	13	14
NET: Not Effective	1	1	1	3	1	0	1	1	1	2	2	2	0	0
Not effective	1	1	1	2	1	0	1	1	1	1	2	2	0	0
Not at all effective	0	0	0	1	0	0	0	0	0	1	0	1	0	0

As only a third of the residents believe the effectiveness of physical distancing as a Covid 19 prevention measure.

Activities Done Last May Vs. Last March 2020

Base: Base: All respondents (wave 1 n=234 vs. wave 2 n=205), in %

	TOTAL		GENDER				AGE				SEC			
	W1	W2	Male	Male	Female	Female	16-29	16-29	30-65	30-65	ABC+	ABC+	C-DE	C-DE
Weighted Base	234	205	117	103	117	102	84	74	150	131	113	99	121	106
Meet friends	86	9 ↓	80	12 ↓	93	7 ↓	81	9 ↓	89	10 ↓	89	10 ↓	83	8 ↓
Wash your hands more often with soap and water	73	63 ↓	70	61	76	65	71	61	74	64	79	63 ↓	67	63
Work from home more often	53	29 ↓	52	30 ↓	55	29 ↓	59	38 ↓	51	24 ↓	59	39 ↓	48	20 ↓
Go to the mall	52	10 ↓	58	12 ↓	46	8 ↓	53	8 ↓	52	11 ↓	58	9 ↓	47	10 ↓
Take vitamins	47	11 ↓	48	11 ↓	45	10 ↓	42	11 ↓	50	11 ↓	61	16 ↓	34	5 ↓
Stay inside the house most of the time	39	56 ↑	45	55	33	57 ↑	43	56	37	56 ↑	45	53	33	59 ↑
Go back to the province	23	7 ↓	15	6	31	9 ↓	21	6 ↓	24	8 ↓	24	5 ↓	22	9 ↓
Sanitize your hands more often with alcohol or hand sanitizer	17	70 ↑	21	64 ↑	12	76 ↑	18	72 ↑	16	69 ↑	20	74 ↑	14	66 ↑
Cancelled or skipped large gatherings	11	45 ↑	15	48 ↑	7	42 ↑	20	41 ↑	6	47 ↑	13	41 ↑	10	48 ↑
Observe more health status more seriously	10	25 ↑	11	24 ↑	8	27 ↑	13	35 ↑	8	20 ↑	12	36 ↑	7	15
Stop shaking hands with other people	9	42 ↑	12	32 ↑	6	52 ↑	13	43 ↑	7	41 ↑	9	50 ↑	9	35 ↑
Visited family and friends in the province	8	3 ↓	10	5	5	1	4	6	10	1 ↓	3	4	12	2 ↓
Keep yourself updated with the current events	6	62 ↑	7	60 ↑	6	63 ↑	13	55 ↑	2	66 ↑	9	63 ↑	4	61 ↑
Self-quarantined	4	14 ↑	5	17 ↑	4	10	6	15	3	13 ↑	6	14	3	13 ↑
Wear mask	NA	70	NA	65	NA	75	NA	72	NA	68	NA	77	NA	64

As residents do more of other Covid 19 prevention tools by limiting their social interactions and do more health-conscious activities.

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

KEY FINDINGS



*Changes on
Consumption
Behavior*

Number of product categories covered (nominated by IRL) | 32

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

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

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

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

Purchase Incidence and Purchase Frequency Perception (Buy More or Buy Less)

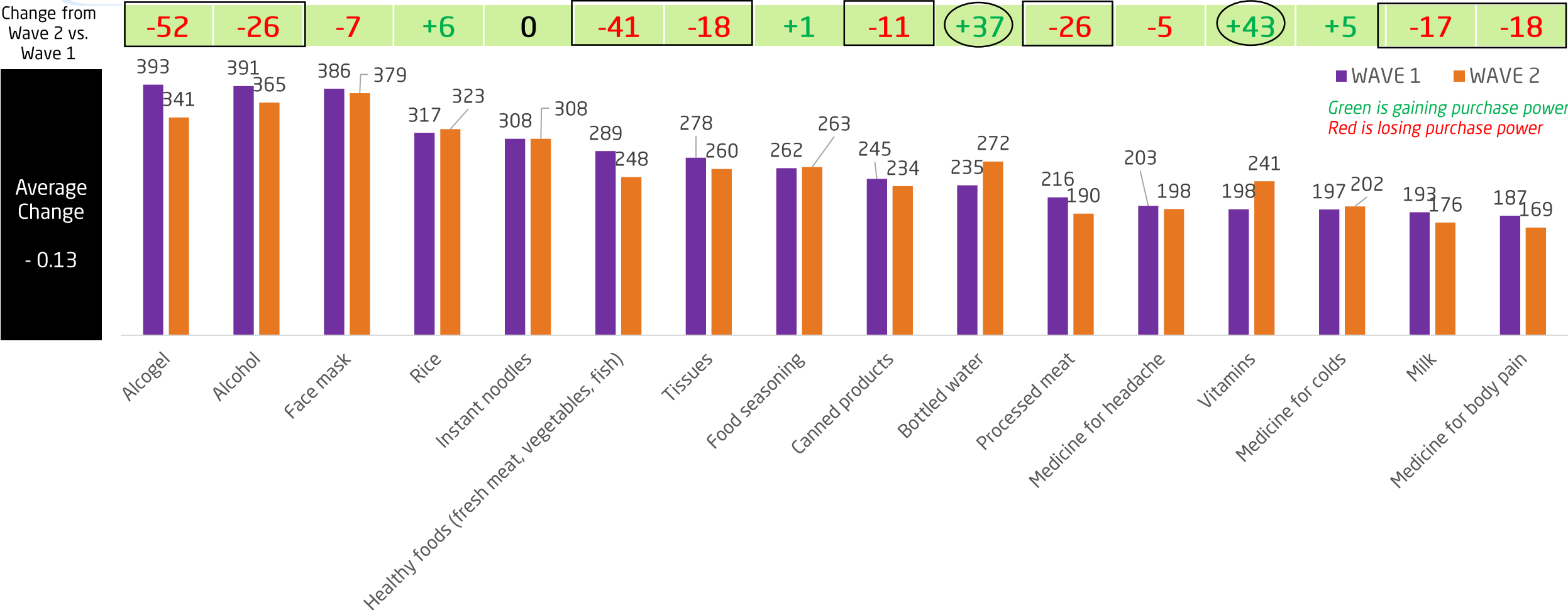
Ranking	PPI BUY MORE INCREASING Purchase Power (Penetration X Purchase Frequency - Buy More)	
	WAVE 1	WAVE 2
1	Alcohol and Alcogel <i>(tie for number 1 position)</i>	Face masks
2		Alcohol
3	Face masks	Alcogel
4	Rice	Rice
5	Instant noodles	Instant noodles
6	Healthy foods (fresh meat, vegetables, fish)	Package/Bottled water
7	Tissues	Food seasoning/ Cooking aids
8	Food seasoning	Tissues
9	Bottled water	Healthy foods (fresh meat, vegetables, fish)
10	Processed meat	Vitamins

PPI BUY LESS DECLINING Purchase Power (Penetration X Purchase Frequency - Buy Less)	
WAVE 1	WAVE 2
Beer	Liquor/wine
Liquor/wines	Beer
Cigarettes	Biscuits
Bread	Processed meat
Electronic gadgets	Electronic gadgets
Coffee	Energy drinks
Biscuits	Cigarettes
Chocolate drinks	Carbonated softdrinks
Canned products	Milk
Ready-to-drink juice	Ready-to- drink Juice

Despite the changes on Covid 19 behavior, residents are not changing their consumption behavior with Covid 19 protection products being more bought more, to the detriment of alcoholic beverages (that ties up with less social interactions).

Purchase Power Index (PPI) of Product Categories During Covid 19 : | [BUY MORE \(i\)](#)

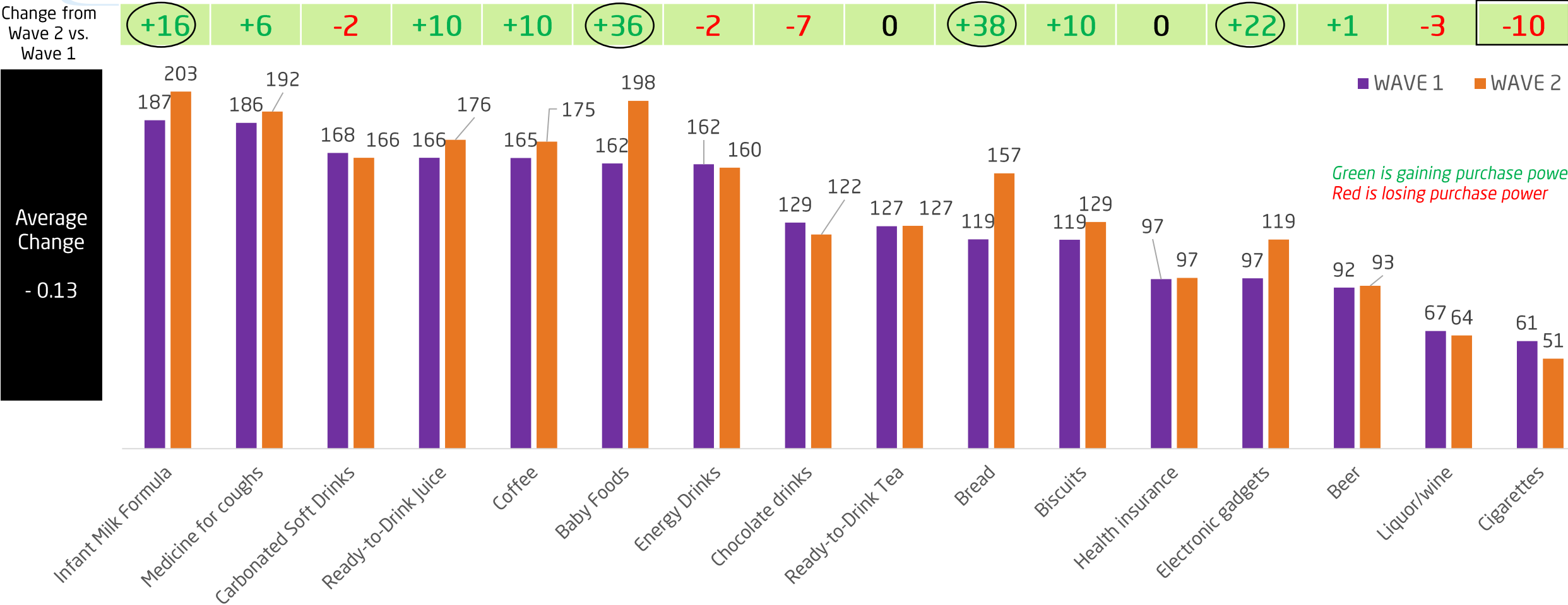
Purchase Incidence and Purchase Frequency Perception (Buy More)



In terms of gains and losses between Wave 1 and Wave 2 among products that are bought more, vitamins and bottled water are gaining while Covid 19 protection products are losing ground.

Purchase Power Index (PPI) of Product Categories During Covid-19 : | [BUY MORE \(ii\)](#)

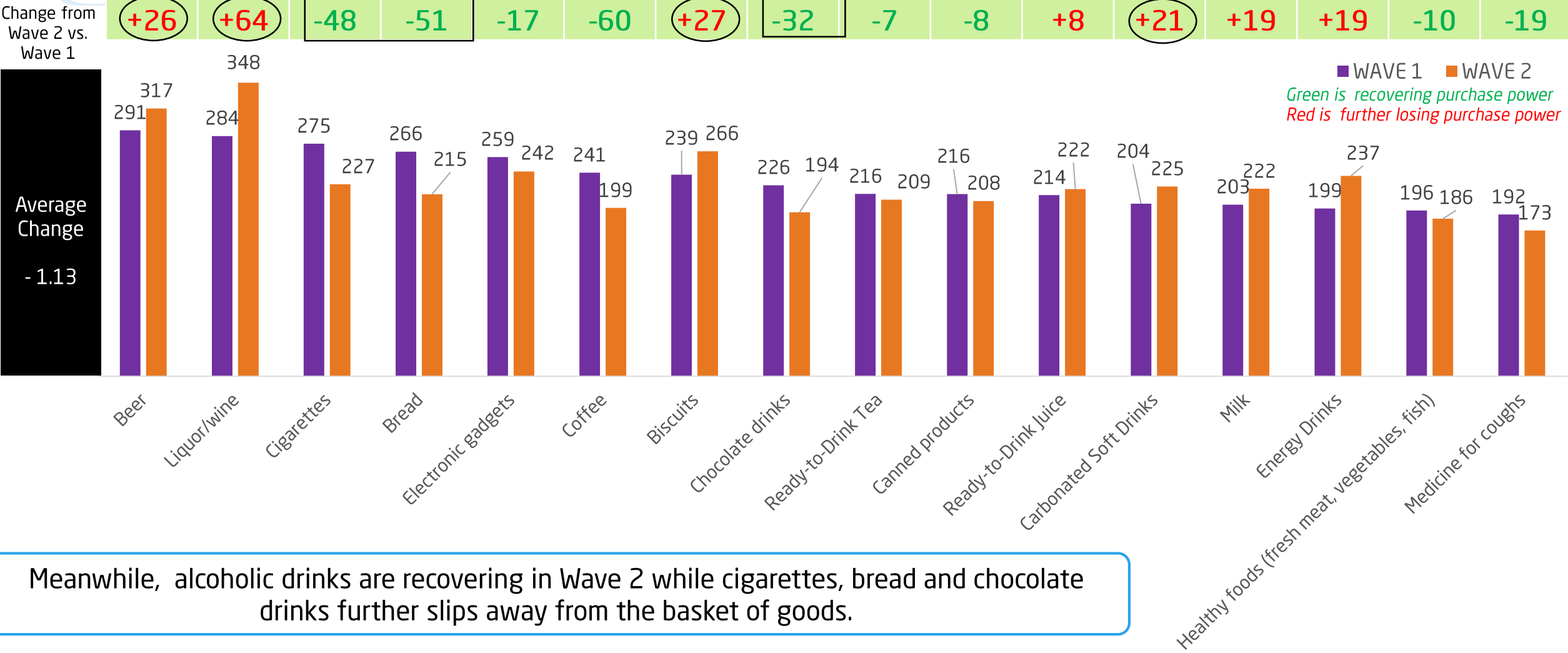
Purchase Incidence and Purchase Frequency Perception (Buy More)



Likewise, baby products and some daily FMCG products are making further headway in Wave 2 with cigarettes losing out.

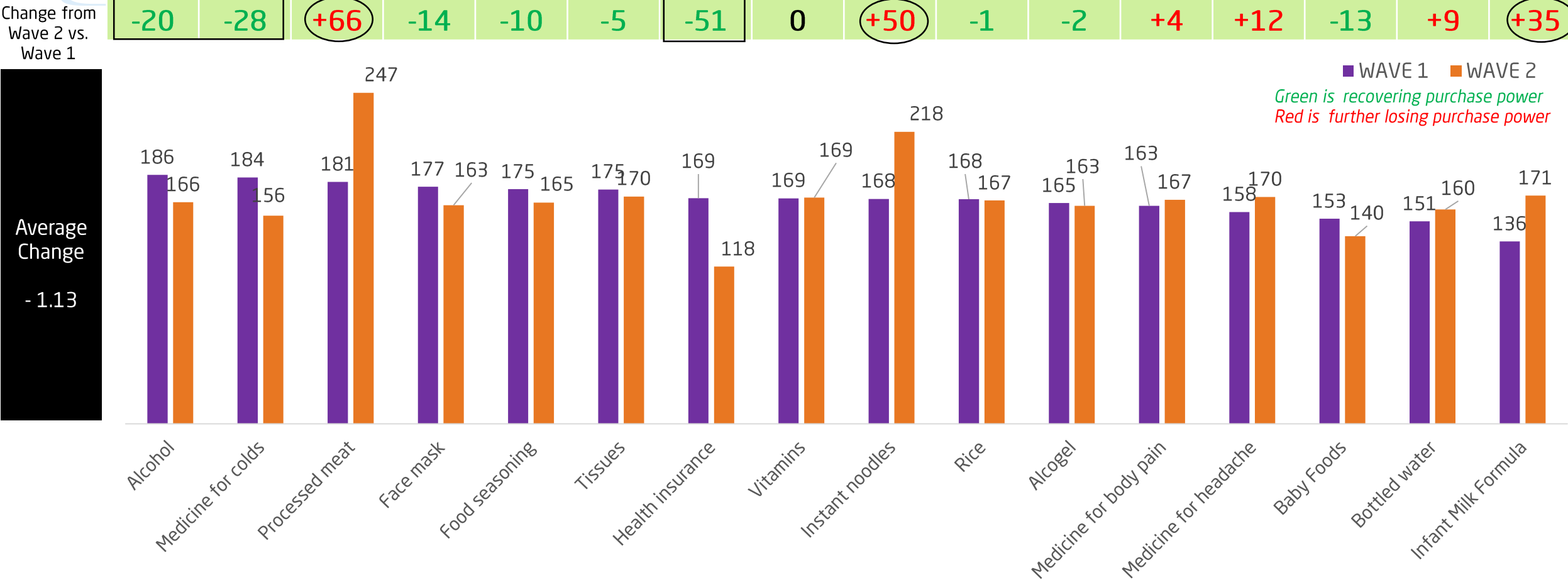
Purchase Power Index (PPI) of Product Categories During Covid-19 : | BUY LESS (i)

Purchase Incidence and Purchase Frequency Perception (Buy Less)



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

Purchase Incidence and Purchase Frequency Perception (Buy Less)



Processed meat, instant noodles and milk formulas are being bought to a lesser degree while health insurance, alcohol and cold medicines are gaining more purchases.

KEY FINDINGS

A pair of black binoculars is positioned in the center-right of the frame, resting on a dark, reflective surface. The binoculars are angled slightly towards the left. The background is a soft-focus bokeh of warm, golden-yellow and orange light spots, suggesting an indoor setting with ambient lighting. A teal-colored rectangular box is located in the upper-left corner, and a yellow rectangular box is in the lower-right corner, both containing text.

*Changes on
Social Behavior*

Number of activities covered (nominated by IRL) | 30

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

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

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)
- Behavior Incidence Index + Behavior Frequency Perception Index (Do Less) to come up with BPI Do Less (which activities declined)

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

Behavior Incidence and Behavior Frequency Perception (Do More or Do Less)

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)	
	WAVE 1	WAVE 2	WAVE 1	WAVE 2
1	Phone top-ups via digital means	Have food delivery by online channel	Do local travel	Shop for clothes
2	Have emergency funds/money	Do online shopping	Shop for clothes	Eat-out in restaurants, coffee shops etc
3	Connect to mobile data	Connect to mobile data	Go to parks/tourist areas	Ride Grab
4	Use digital payments	Have food delivery by phone	Go to wet market	Ride tuktuk
5	Do on-net calls	Phone top-ups via digital means	Eat-out in restaurants, coffee shops	Go to parks
6	Withdraw money from banks	On-net calls	Shop in local stores	Do local travel
7	Have food delivery by phone	Use digital payments	Do local remittance	Go to wet market
8	Do online shopping	Have emergency fund	Ride tuktuk	Shop in local stores
9	Use cash	Phone top-ups via traditional groceries	Use cash	Go to bars
10	Send on-net SMS	Connect to home wifi	Ride Grab	Use cash

Shift to a digital life continues with online shopping and food delivery becoming a norm.

Meanwhile, residents continue to shy away from socialization, public transportation and on-site shopping.

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

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



Behavior Incidence and Behavior Frequency Perception (Do More)



Phone food delivery and online shopping soar in Wave 2 while digital phone top-ups and provision of emergency fund are done to a lesser extent.

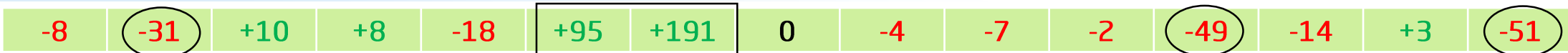
Behavior Power Index (BPI) of Personal Activities and Habits During Covid 19 : | DO MORE (ii)



Behavior Incidence and Behavior Frequency Perception (Do More)

Change from Wave 2 vs. Wave 1

Average Change
+0.03

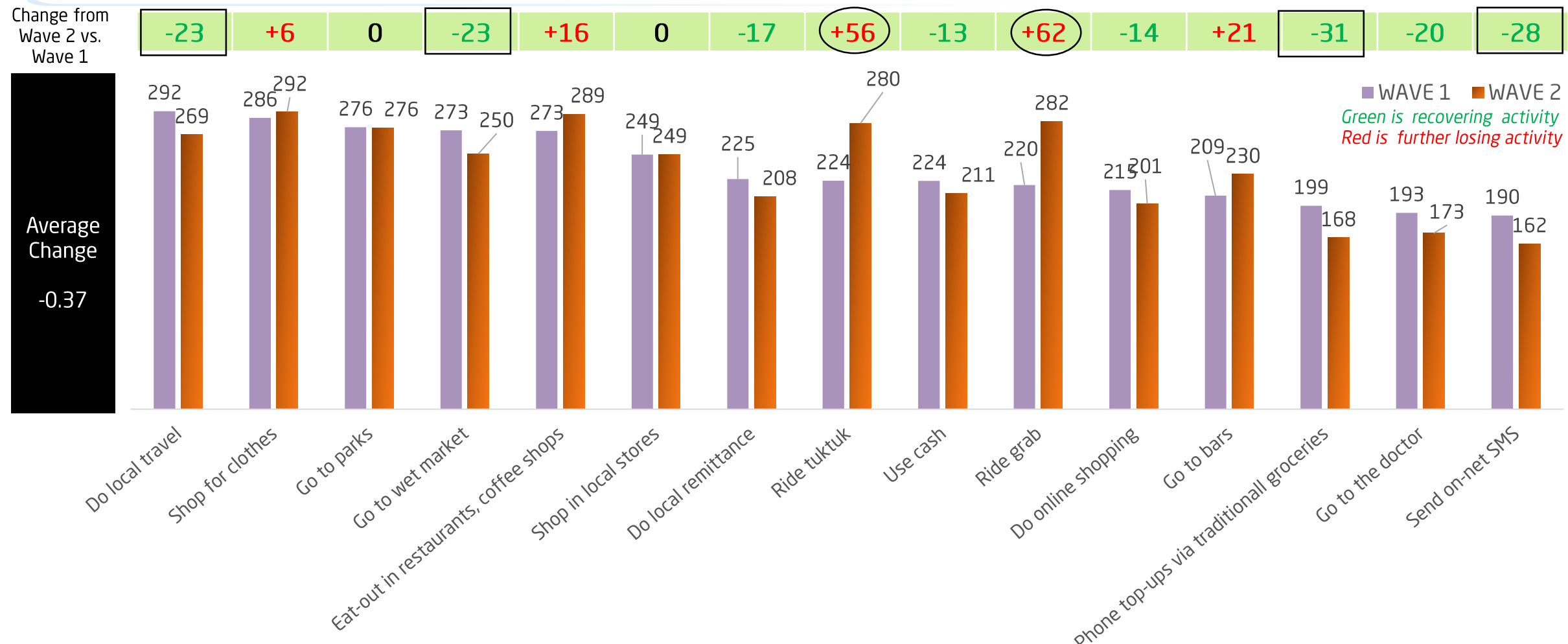


■ WAVE 1 ■ WAVE 2
Green is doing more
Red is doing lesser

And online food delivery and home wi-fi connection are becoming more popular as a task while residents are moving away from out-of-home activities.

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

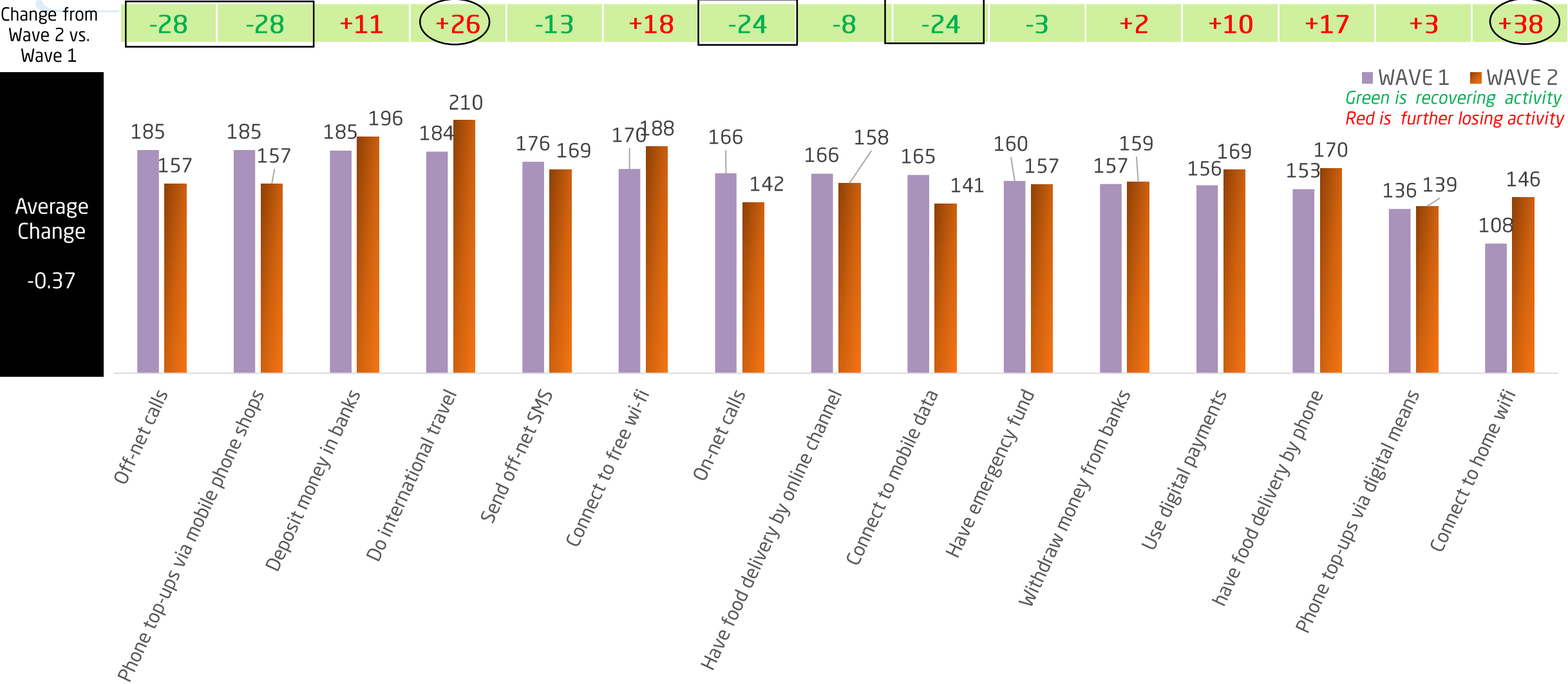
Behavior Incidence and Behavior Frequency Perception (Do Less)



Meanwhile, riding public transportation are done to a lesser extent while there are indications of Khmers going to their normal personal habits.

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

Behavior Incidence and Behavior Frequency Perception (Do Less)

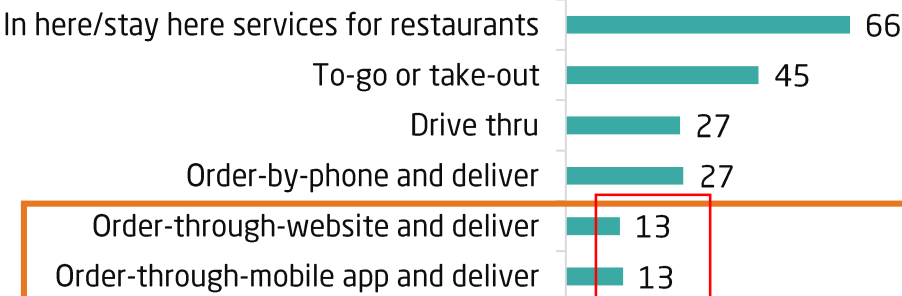


As people gets mobile (to work or go outside) , Khmers are going for mobile data rather than wi-fi.

Penetration of Online Food Delivery

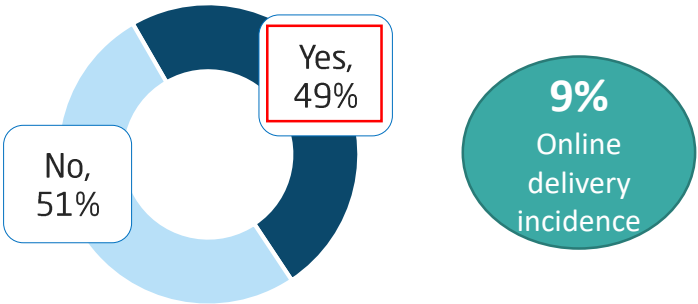
Base: All respondents (n=234) - Wave 1 , in %

Awareness of Food Services



	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117	n=117	n=84	n=150	n=113	n=121
		(A)	(B)	(C)	(D)	(E)	(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?

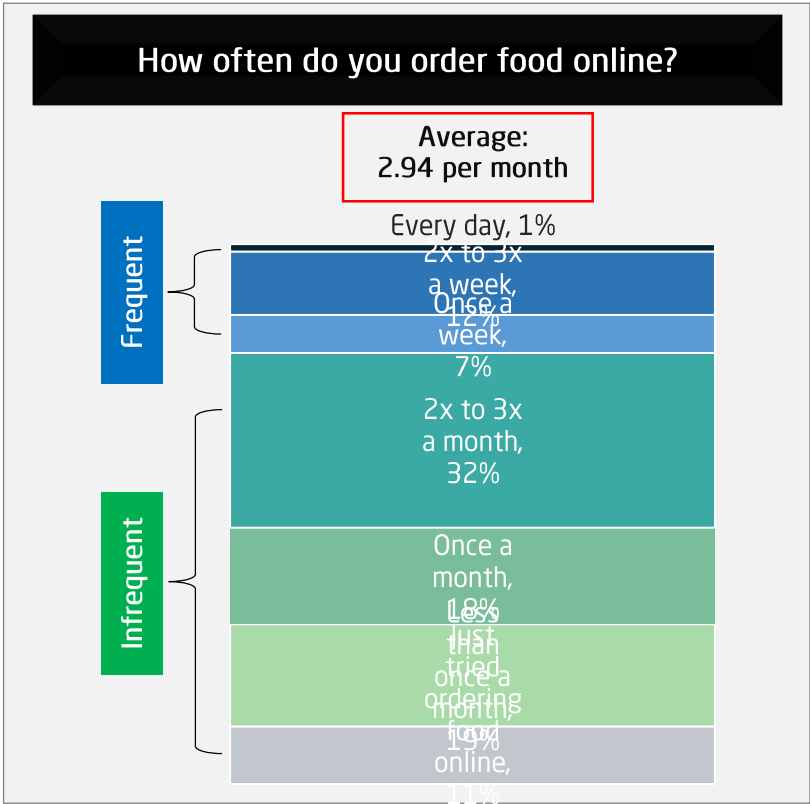
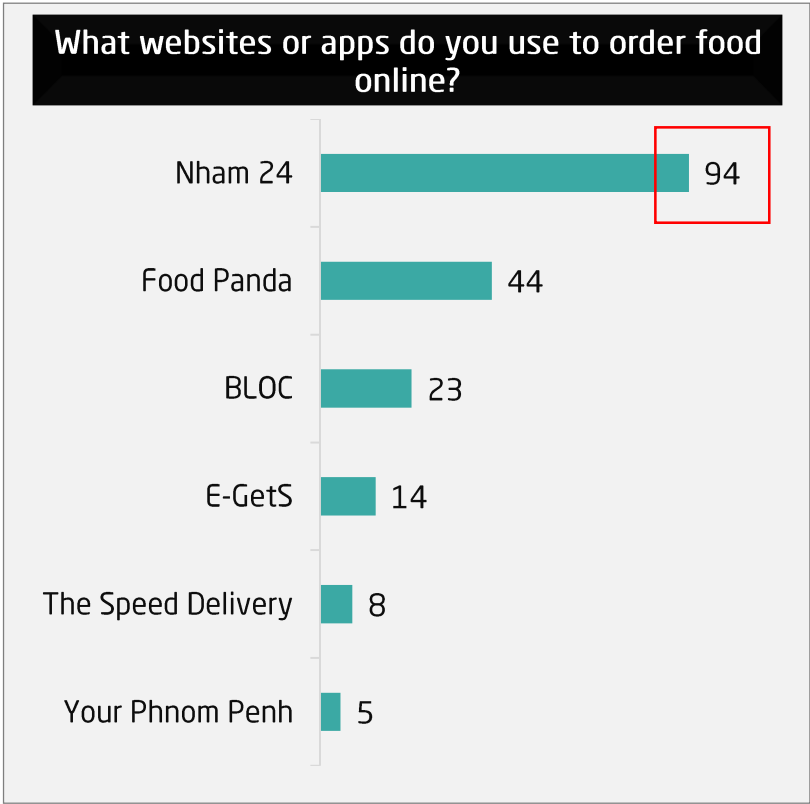


Online food ordering/delivery can still be considered as a relatively young innovation as only 2 out of 5 are aware of that service (skewed towards upper income and younger customers).

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*), Wave 1 in %



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

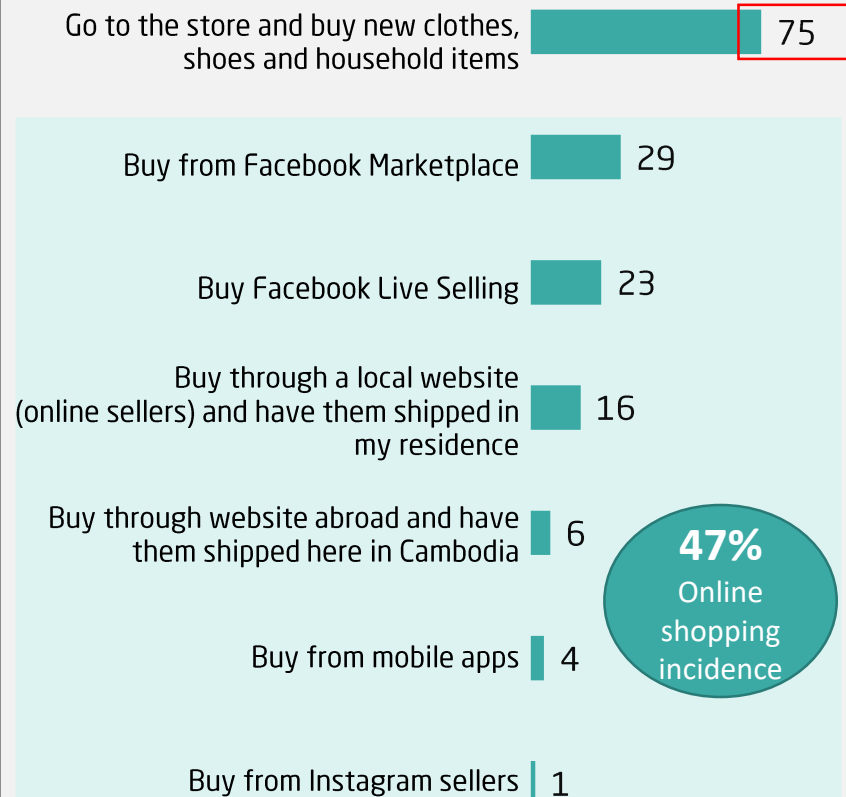
*Caution in reading: small base (below n=30)

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)?

Usual Ways of Doing Shopping

Base: All respondents (n=234), Wave 1, in %

Total



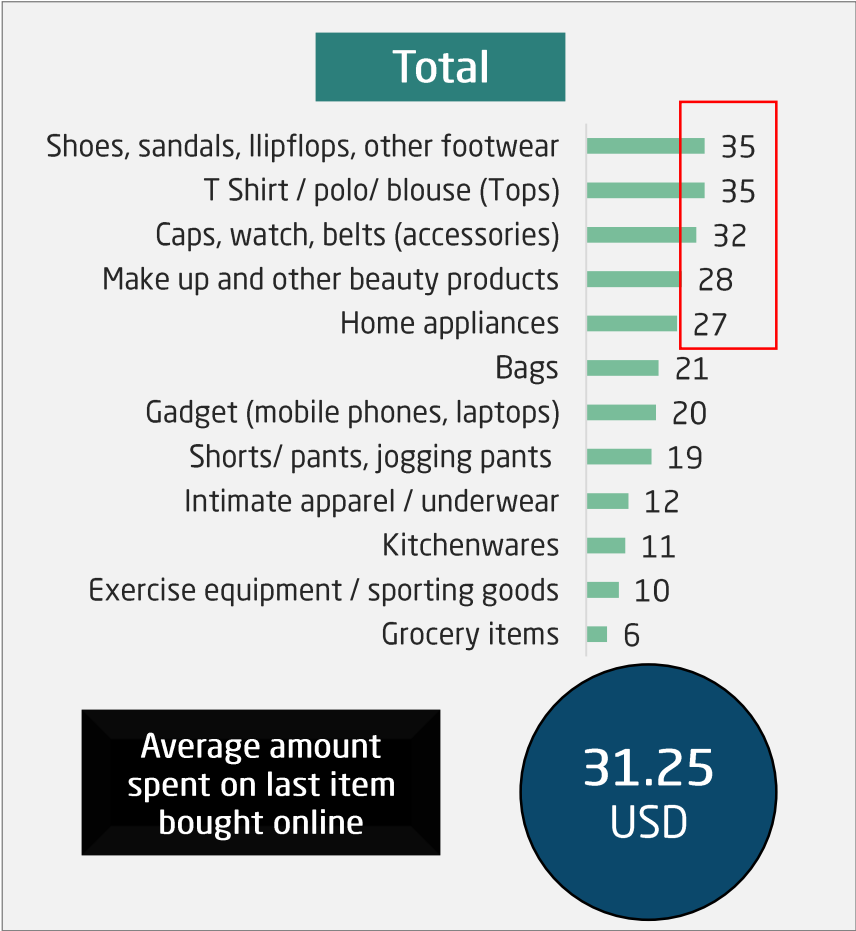
	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=234	n=117 (A)	n=117 (B)	n=84 (C)	n=150 (D)	n=113 (E)	n=121 (F)
Go to the store and buy new clothes, shoes and household items	75	71	80	67	80 C	69	82 E
Buy from Facebook Marketplace	29	31	27	33	27	33	26
Buy Facebook Live Selling	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?

Items Bought Online

Base: Among who buys item online (n=111), Wave 1, in %

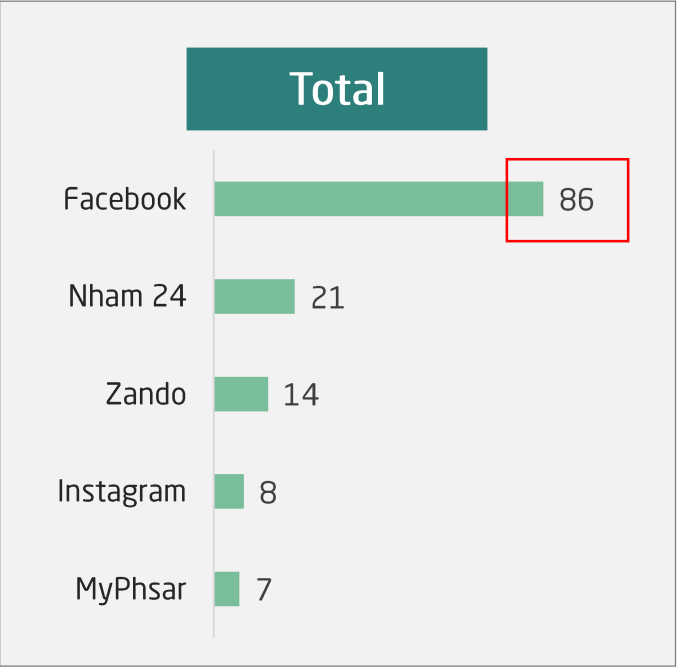


	TOTAL	GENDER		AGE		SEC	
		Male	Female	16-29	30-65	ABC+	C-DE
Weighted Base	n=111	n=60 (A)	n=51 (B)	n=49 (C)	n=62 (D)	n=67 (E)	n=44 (F)
Shoes, sandals, flipflops, other footwear	35	28	42	28	40	35	33
T Shirt / polo/ blouse (Tops)	35	32	38	36	34	38	30
Caps, watch, belts (accessories)	32	31	34	29	35	31	34
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.

Apps/Website Used to Buy Items Online

Base: Among who buys item online (n=111), Wave 1, 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?



LEARNINGS AND IMPLICATIONS

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	Learnings	Implications
1	Phnom Penh residents are embracing the new normal -- combining digital lifestyle (including food delivery) with their normal tasks (except on out-of-home activities)	<ul style="list-style-type: none"> Digital (including social media) should ALWAYS be a part of the communication touchpoint mix of brands Food delivery as a "moment of truth" should be considered, both as a purchase channel and communication material platform
2	Khmers are still worried about Covid 19 but state of fear is more managed 3 months after the peak of Covid positive cases. Personal health measures are done as social distancing is not being practiced	HORECA and retail stores can help the government to enforce social distancing from the customers
3	<p>Covid 19 brings some changes on the product consumption of Khmers</p> <ul style="list-style-type: none"> Pharmaceutical and telecommunications products are the big winners Alcoholic products are taking a big hit Baby (Milk formula and baby foods), few FMCG products (bottled water, coffee, RTD Juice, bread) and electronic gadgets are starting to recover from the purchase dip in March 2020 	<ul style="list-style-type: none"> Marketing efforts can be re-engineered to more in-home consumption occasions Promotions to drive sales during the three big holidays in H2 2020 should be in full gear Building brand loyalty/brand equity should still be done to make the brand navigate in the minds and hearts of consumers Opportunity to tap into <ul style="list-style-type: none"> A nationalistic message (to show the brand cares for the country) by providing help to the government in mitigating the social and economic impact of Covid 19 to some sectors of the society A health messaging (to show the brand cares for the health of Khmers) by infusing Covid 19 protection to what the brand stands for



Indochina Research

Thank you!



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