



WHAT DO CAMBODIANS THINK? – 2022

A SURVEY OF CAMBODIANS' ATTITUDES
TOWARD SOCIETY AND POLITICS

November 2022

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ABOUT KONRAD-ADENAUER-STIFTUNG

Freedom, justice and solidarity are the basic principles underlying the work of the Konrad-Adenauer-Stiftung (KAS). The KAS is a political foundation, closely associated with the Christian Democratic Union of Germany (CDU). As co-founder of the CDU and the first Chancellor of the Federal Republic of Germany, Konrad Adenauer (1876-1967) united Christian-social, conservative and liberal traditions. His name is synonymous with the democratic reconstruction of Germany, the firm alignment of foreign policy with the trans-Atlantic community of values, the vision of a unified Europe and an orientation toward the social market economy. His intellectual heritage continues to serve both as our aim as well as our obligation today. In our European and international cooperation efforts, we work for people to be able to live self-determined lives in freedom and dignity. We make a contribution underpinned by values to helping Germany meet its growing responsibilities throughout the world. KAS has been working in Cambodia since 1994, striving to support the Cambodian people in fostering dialogue, building networks and enhancing scientific projects. Thereby, the foundation works towards creating an environment conducive to economic and social development. All programs are conceived and implemented in close cooperation with the Cambodian partners on the central and sub-national levels.



ABOUT SPEAR INSIGHTS

Spear Insights is a research and consultancy agency founded at the start of 2020. The agency is based in Cambodia but works regionally on both development and private sector projects. Spear Insights strives to create actionable recommendations from the insights it gathers in all forms of data. With consultants who have backgrounds in different sectors and who originate from both local and international environments, the agency has a well-rounded understanding of the Southeast Asia development context.

ACKNOWLEDGEMENT

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DISCLAIMER

The opinions and ideas presented in this paper represent those of the participants of the poll. Their presentation does not entail any endorsement of these views either by Spear Insights, Konrad-Adenauer-Stiftung Cambodia, or the editors. All policy recommendations are based on the sources highlighted in this document.

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1. EXECUTIVE SUMMARY

WHAT DO CAMBODIANS THINK? – 2022: A Survey of Cambodians' Attitudes Toward Society and Politics is The Konrad-Adenauer-Stiftung's second public opinion poll on Cambodian perspective toward different social and political aspects of Cambodia. The aim of this nationally representative survey, a follow-up to polls conducted in 2020, is to provide a real assessment and better understanding of the attitudes and priorities of the Cambodian public that may contribute to Cambodia's current social and political environment. The 2022 survey repeated various questions from the prior surveys to measure the changes in the opinions of Cambodians on certain socio-political topics over the last two years. Some questions from the 2020 survey were removed, and they were replaced by parts on the environment and gender, in addition to new questions being added in the media and civic engagement sections of the 2022 survey.

This survey was based on 1,000 phone call interviews with Cambodian citizens between the ages of 18-64 across all provinces in Cambodia. The survey was commissioned by Konrad-Adenauer-Stiftung Cambodia and data was collected by Spear Insights. Its findings are clustered around the following topics:

1. DAILY LIFE

COVID-19 has had a negative effect on Cambodian's lives, but things are beginning to improve as restrictions lessen and life returns to normal. In the previous study COVID-19 was taking most effect on Phnom Penh residents, yet in 2022, Phnom Penh residents are looking most hopeful towards the future. However, the economy, rising gas and commodity prices, and recession loom over the population as 47% report this concern in an unprompted open question. Respondents have placed increased importance in earning more money and buying a house, which is perhaps a reflection of these inflation concerns. Cambodia is clearly developing its workforce as the population is becoming more educated and are achieving higher incomes. Not only is this an attribute for the economy as a whole, but positive for individuals as more educated respondents reported being more positive about their lives improving.

2. MEDIA CONSUMPTION

Social media and the internet continue to grow in importance with a 9% increase in Cambodians using social media and 10% increase in internet news being used as the primary news source since 2020.

University graduates are most distrustful of the media with 52% of graduates reporting that they do not trust it whilst only 24% of those with only primary or no formal education distrusted the media. Yet, university graduates are the most open to sharing their own opinion with 41% somewhat or very open to voicing their opinion.

3. CIVIC ENGAGEMENT

University graduates showed the most interest in politics with 74% ‘a little’ or ‘a lot’ interested compared to only 43% of those with primary or no formal education. Compared to 2020, there was a reduction in the likelihood of people to vote in the next election, this result ultimately matched that of the lower voter turnout in the 2022 commune elections. This is perhaps due to the influence they feel over political decision making as more than a third of respondents believed that they had no influence over political decision making at all.

Political issues vary across the country. Plateau and Mountain regions put more emphasis on candidates who are approachable and also on receiving gifts than that of the other provinces. They also identified the need for national budgets to be spent on infrastructure whereas the capital believes more in other items such as education, and water and sanitation infrastructure than other locations.

Interestingly, despite COVID-19 having made the country implement social distancing, many work from home and fast-track the development of digital systems, Cambodians still prefer to engage with public administration face-to-face rather than digitally, yet the results of this study cannot determine the exact reasons for why this may be.

4. INTERNATIONAL RELATIONS

China remains being viewed as Cambodia’s closest and best partner, possibly owing to the donation of more than 10 million doses of COVID-19 vaccines up to June 2021. ASEAN was known by around half of the respondents and knowledge of it increased along with education levels. Among those who knew ASEAN, just over half considered themselves as ASEAN citizens over being Cambodian, this increased among education levels with 68% of university graduates considering themselves as ASEAN.

5. THE ENVIRONMENT

More than two thirds of Cambodian’s reported caring ‘very much’ about the environment. Younger and more educated Cambodian’s reported caring more about the environment than other demographics. It is hopeful that the younger generations have greater concerns than that of the older generations. Deforestation is the most noted concern among respondents, although waste management was of particular concern for those in Phnom Penh. Although Phnom Penh has the vast majority of its waste collected, burning is still dominant in the other regions. Plastics are acknowledged to present a serious environmental concern, especially among graduates and Phnom Penh residents whom 96% and 93% recognize it, respectively. Perhaps due to the dominant practice of burning waste in the provinces, plastic wastes are not noticed so much. Believing that individuals could contribute towards environmental problems and solutions was agreed more by university graduates than any other demographic.

6. GENDER EQUALITY

Eighty-two percent of Cambodians suppose that men and women are equal. However, slightly more people believe that men have an advantage over women. As education and income levels increase more respondents think that men have an advantage. However, almost twice as many men as women believe that men are better leaders than women. Interestingly, among university graduates, males more often thought that men were better leaders and women more often thought that they were better leaders. Sharing of household tasks between genders appears to be more common among poorer and less educated households. Overall, male respondents more frequently report that tasks are shared between genders than female respondents.

CONCLUSIONS & RECOMMENDATIONS

1. EDUCATION

A key takeaway of this research is that education can make a huge difference in a person's beliefs. Across all sections, university graduates thought differently from the rest of the population. Their interest in political issues, willingness to share their views yet less trust in the media, understanding of environmental and gender concerns are different from the rest of the population. These critical views show the importance of education.

2. ECONOMIC CONCERNS

The population is very concerned with inflation and a stagnating economy, particularly with regards to rising gas prices. The government should look towards how rising gas prices can affect the population and possibly look into how this economic shock may be able to be lessened. Previously, during COVID-19, IDPoor was used to identify vulnerable persons and to provide them with cash transfers of \$30 per month (plus additional payments for other vulnerabilities, for example, for disabled household members and those with HIV). A similar system could be implemented should this economic shock continue to effect the country.

3. ENVIRONMENTAL ISSUES

Understanding of environmental concerns is mixed. In particular the issues of waste management and single use plastics are still not well understood by those in the provinces. The government should continue to promote good environmental practices among those of lower economic status in more remote areas in order to protect the country's natural resources. Community champions of change should be identified and used as well as billboards or TV/radio spots which were previously used to disseminate information on COVID-19 (i.e., the 3 do's and 3 don'ts which were so well publicised), could be transferred to this important issue in order to change the public's understanding.

4. DIGITAL INNOVATION

Results from the survey question whether digital public administration can be easily integrated. Further understanding and research should be followed up to understand why Cambodian's still prefer face-to-face administration. This additional knowledge could help the government integrate these preferences into future digital administration tools.

5. UNDERSTANDING OF GENDER

The differences in gender in Cambodia, particularly the disparity between male and female university graduates should be explored. Understanding of why male and female graduates believe their own gender to make the better leaders could be of interest for further research.

2. BACKGROUND AND STUDY OBJECTIVES

In general, Cambodia still lacks scientific findings on its people's socio-political attitudes. To address this, the goal of this research is to provide scientific, unbiased public opinion poll findings that generate an understanding of Cambodian citizens' political and societal attitudes, priorities, and future expectations on various topics such as outlook on life, civic engagement, media consumption, international relations, the environment, and gender in the country. On a much-needed note, this quantitative study intends to provide scientific input for social scientists and scholars, paving the way for further interpretation and a more in-depth study into why and how Cambodians believe and feel about various social and political topics in the country.

The research, therefore, addresses the following questions:

- What does life look like for Cambodians in 2022?
 - What ideals are valued the most in life?
 - What are the main challenges facing Cambodians today?
- What is the level of civic engagement?
 - How do individuals consume information about current affairs?
 - How likely are Cambodian citizens to vote in the next general election?
 - Which factors influence their vote?
 - How do individuals participate in society?
- What would strengthen Cambodia?
 - What social issues should the government prioritise?
 - How do Cambodians perceive relations with foreign nations?
- How concerned are Cambodians with environmental issues?
 - What are the biggest concerns?
 - How much impact can individuals have?
- How equal are genders considered?
 - What are the roles of men and women in the household?
 - Is there a difference between which gender makes better leaders?

3. FINDINGS

3.1 LIFE FOR CAMBODIANS IN 2022

This section outlines the current contextual challenges facing Cambodia. It delves into understanding Cambodians' outlook on life and the problems facing them in the first half of 2022.

COVID-19 had a negative effect on Cambodian's lives, but things are beginning to improve.

Compared with the previous study fewer respondents felt as though their lives had improved in the last 5 years (43% in 2022 compared to 53% in 2020). To understand this, it is important to note the time of data collection for both studies. The fieldwork for this research was undertaken from the 11th to the 25th of May 2022. The previous research took place in October 2020. At the time of the previous study, COVID-19 was present, but very much under control in Cambodia, the total number of cases to date in the country was less than three hundred and no one had died from the virus yet. Although some restrictions were in place in Cambodia (a provincial travel ban in April 2020, mask mandates and social distancing) the main effects and restrictions resulting from COVID-19 would not occur until 2021. These main effects occurred after the so-called 'February 20 community transmission event,' wherein a break-out from the mandated two-week quarantine upon entry to Cambodia led to COVID-19 sweeping through the nation. Many harsher restrictions were implemented after this including lockdowns and designation of 'red zones' during which lockdowns were strongly enforced with no ability for those within the zones to leave their homes.

It could be argued that COVID-19 has 'been and gone' in the interim between the previous and this current research. During the time of data collection in 2020, COVID-19 was increasing in relevance and concern and effects were starting to be felt. At the time of data collection in this 2022 report, however, COVID-19 effects are lessening. So much so that mandates to wear masks in non-enclosed spaces were withdrawn on April 26th shortly before data collection began. Other global events were beginning to take precedence in the news, such as rising inflation and gas prices, stock prices struggling to maintain previous levels and the Russia-Ukraine war which began on 24th February 2022.

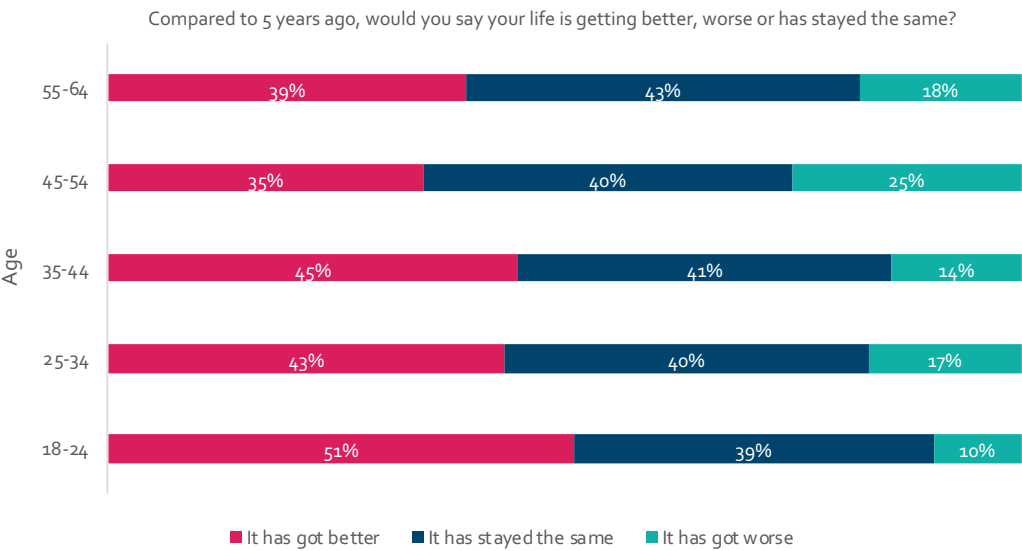
Unsurprising to the authors, with the challenges that COVID-19 brought to Cambodians throughout 2021, fewer respondents reported that their lives had improved than in the previous study (43% in 2022 compared to 53% in 2020). Contrary to the previous study which found that Phnom Penh residents were the most likely to have found that their life had become worse, the study this year has found that Phnom Penh residents are now most prone to say that their lives have improved (49% compared to 37% in 2020).

Bright outlook for the youth of Cambodia

As in the previous study, there is a trend that younger respondents more frequently reported their lives have improved in the past 5 years than older respondents. In both studies, those aged 45-54 had the most pessimistic view. There was little difference between males and females in the survey and no clear correlation between different income levels. However, a clear trend appears among those of different educational attainment. There is a clear correlation that individuals with higher education responded more positively when asked about the outlook of their life with 62% of respondents with a vocational degree and 60% of university graduates saying it has improved and only 8% of both saying it has gotten worse.

Compared to the previous study, the respondents in 2022 are continuing to be more educated and achieve higher incomes. 57% of 18-24 have a high school or university education compared to 42% in 2020, furthermore, 14% of the respondents in 2022 have an income higher than \$800 USD per month compared to only 7% in 2020. Cambodia is clearly developing its workforce.

Figure 1: Compared to 5 years ago, would you say your life is getting better, worse or has stayed the same? (by age)



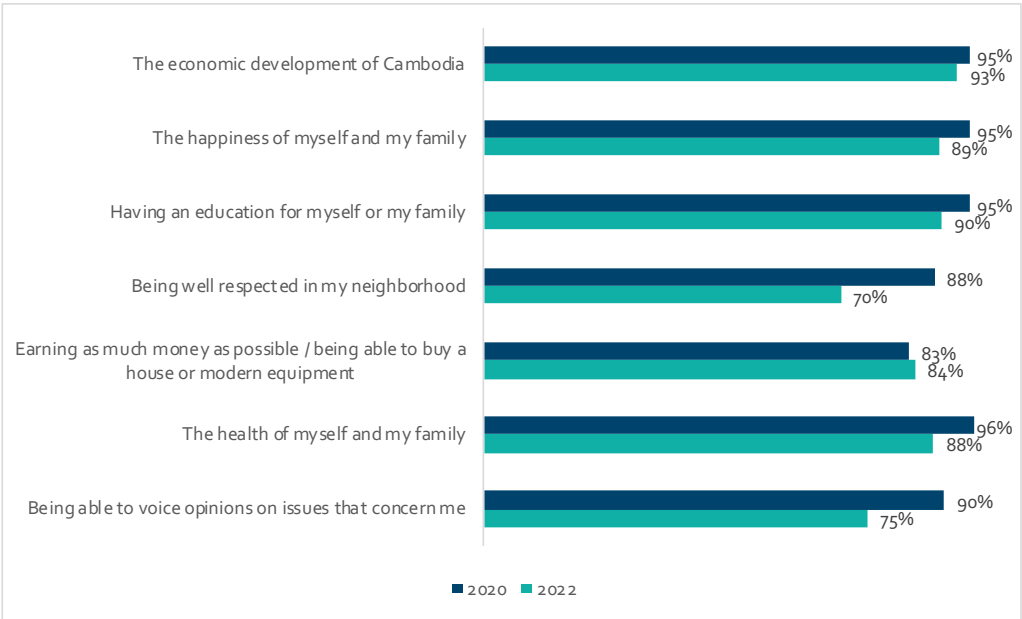
Economic development, education, health and happiness remain of key importance

In 2020, education, health, happiness and the economic development of Cambodia were the most important values of Cambodians and these remain the most important values currently, however, changes in the world are evident in the answers to this year's research. Overall, the ratings for each of the values were lower than 2020 as respondents provided fewer responses to this multiple choice question¹. The results rankings, nonetheless, match closely with that of the previous study. The main difference between the 2020 and 2022 studies is the increased importance of 'earning as much money as possible / being able to buy a house or modern equipment.' The authors believe that this is a reflection of the changes in inflation and rising gas prices that have occurred in recent months.

Answers from both men and women were similar; although women tended to provide more answers than men to the question, but when taking this into account the difference between their replies was not substantial. The Phnom Penh region had a much higher response to 'being able to voice opinions on issues that concern me,' with 87% compared to the average across all locations with 75%. This is likely indicative of the education level of the capital as higher educated respondents were considerably more interested in being able to voice their opinion (88% compared to only 57% of individuals with no education). Conversely, those with no education value health to a much greater degree with 91% of those with no education finding health to be 'very important,' compared to only 65% of university graduates who find it 'very important.' Interestingly, both the oldest and youngest respondents found 'being well respected in their neighbourhood' to be of more importance than the middle age groups, this possibly reflects the traditional values of older persons and the family pressures put on youth to uphold such values.

¹The authors perceive that this is possibly due to the change in methodology from face-to-face to telephone interviews. Perhaps the less personal interview method resulted in respondents providing shorter responses with less answers.

Figure 2: What is important in your life?*



* percentage of respondents who answered ‘very important’ or ‘quite important’

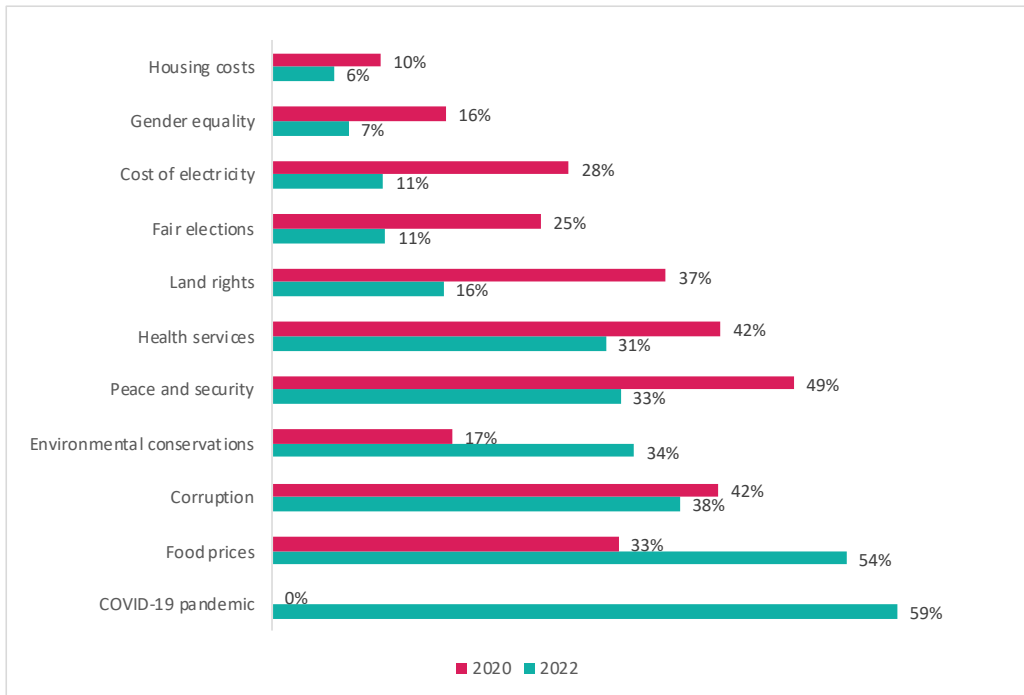
Economic concerns have usurped COVID-19

The open answer question posed to respondents on “what do you think are the biggest challenges facing Cambodia now” returned answers that reflect the current state of the world. 47% of respondents answered that the economy, rising gas and commodity prices or a recession was their main concern. This is a substantial increase from the 2020 study which had 21% stating economic challenges. The second most mentioned concern was about the spread of COVID-19 with 35%. This is further evidence of the lessening impact of COVID-19 as this has reduced from 56% in 2020. The third most frequently mentioned issue was regarding natural resource management and environmental concerns, including waste management with 7%. In the previous study, there had been many floods around the time of data collection and this was evident in the results with 65% citing this, in 2022 there were no respondents who mentioned flooding directly.

Respondents were asked to put themselves in the government’s shoes: if they wielded decision making power, what issues would be the most pertinent and what would they prioritise? The social issues selected reflect the open answers given for the top issues in Cambodia above. An option for economic downturns and inflation was not included within this question’s codes, it is likely that the high number of respondents who selected ‘food prices’ (54%) reflects the broader economic fears of Cambodians today with regard to inflation and rising gas prices.

This was a very large increase from the 33% who selected it in 2020. Also compared to 2020, peace and security have dropped substantially in importance from being the major concern with 49% in 2020 to 5th place with 33% in 2022. The largest decrease in importance from 2020 is in land rights which has reduced from 37% to 16%. This issue remains of greater importance to the Mountains and Plateau region where 27% of respondents identified it within their top 3 issues. Interestingly, men identified gender equality as an issue more often than women with 8% compared to 6%.

Figure 3: Please rank these issues in terms of which ones you think are more important for you? *



*each respondent selected 3 social issues which they were concerned about. Covid-19 pandemic was not included in the 2020 study.

3.2 MEDIA CONSUMPTION

This section strives to understand the media consumption of Cambodians, their trust in news sources and their willingness to share online.

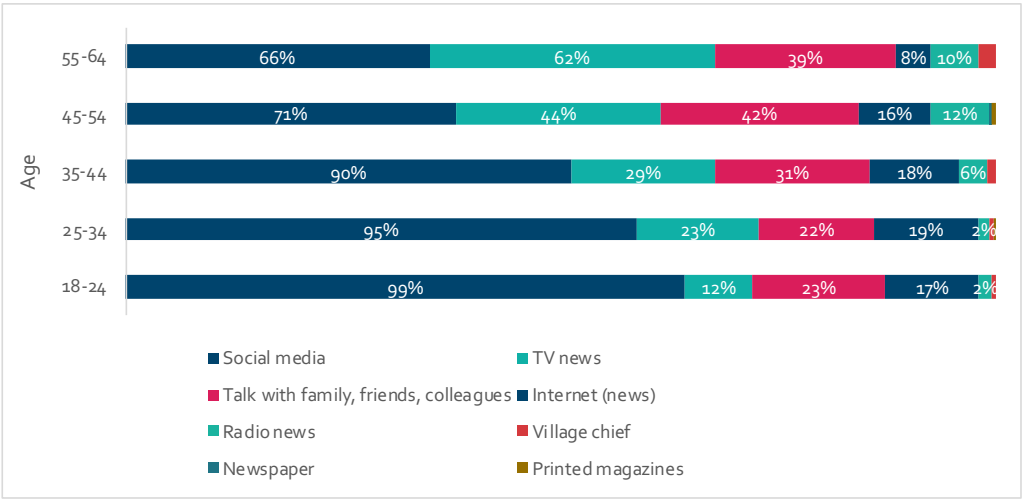
Social media and the internet continue to grow in importance over traditional news media

Findings from 2022 show that 88% of respondents use social media as their primary news source an increase of 9% from the result in 2020. Internet news has seen a growth of 10% since 2020, but at 17% remains below TV and social connections (both at 29%).

Using social media as a news source increases in usage among lower age groups with 99% of the youngest age group, 18-24 year olds, using it as their source of information. However, the percentage of each age group using social media as their news source has grown with even the 55-64 year olds increasing from 55% to 66% between 2020 and 2022. In general, it can be seen that social media is used slightly more by males than females and TV more by females than males, perhaps a reflection of gender roles and women spending more time at home.

Social media was also more popular in Phnom Penh (95%) and less popular in the Plateau and Mountains region (79%), likely owing to the problem of internet speeds and signal connectivity. Both internet news and social media grow in popularity as education levels and incomes get higher. Getting news information from TV has the inverse correlation to social media and internet news across all demographics.

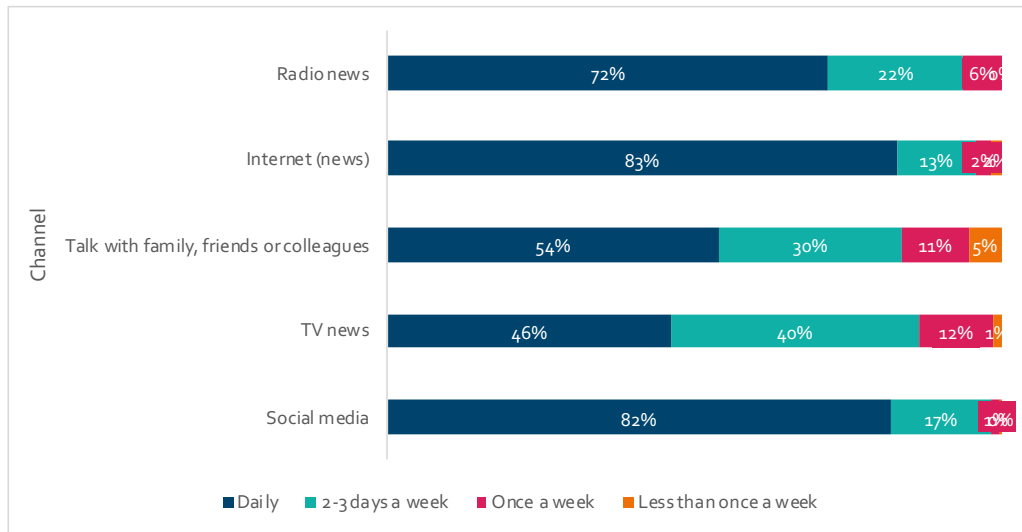
Figure 4: How do you normally get information about what is happening in the country/world? (by age)



Internet and social media users are most often daily users

Social media and the internet remain the most frequently used media channels with 82% and 83% respectively checking them daily. Males reported checking social media daily more frequently than women (82% compared to 73%), however, TV watching females reported watching daily more than male watching men (52% compared to 46%).

Figure 5: How often do you use each source to obtain information about what is happening in the country/world?

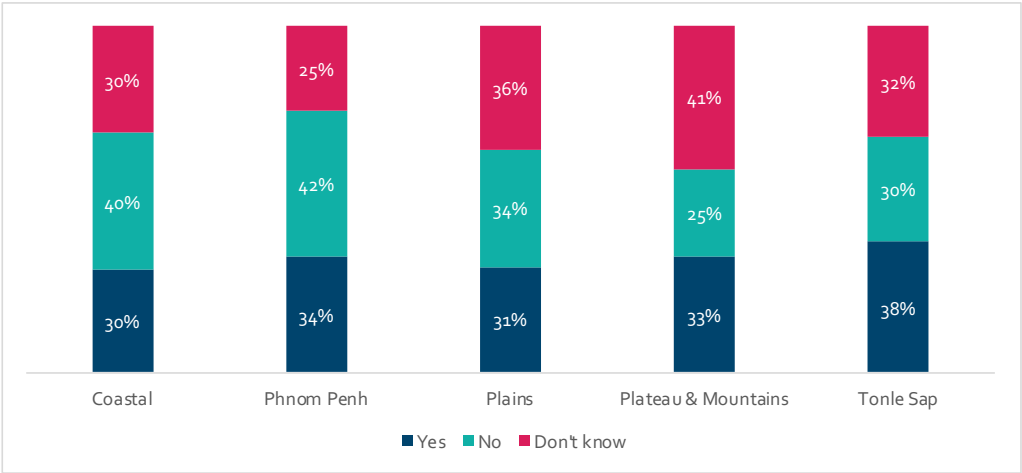


Social media N=884, TV News N= 290, Talk with family, friends or colleagues N=291, Internet (news) N= 170, Radio N=53

Younger and more educated Cambodians are less trustful of media

Overall, approximately one-third of respondents trust the media, one third do not trust it and the final third did not know or refused to respond. Trust was slightly higher in females than males (35% of women trust compared to 32% of men). Trust in the media was similar across the different age groups with slightly more distrust amongst the youngest respondents (37% of 18-24 year olds and 39% of 25-34 year olds not trusting it). Respondents were less likely to trust the media in Phnom Penh (42% do not trust) and Coastal regions (40% do not trust). The Tonle Sap region was the most probable to trust the media with 38%. The largest distrust came from the highest educated, with 52% of university graduates reporting that they do not trust the media whereas only 24% of those with only primary education or no formal education distrusted the media.

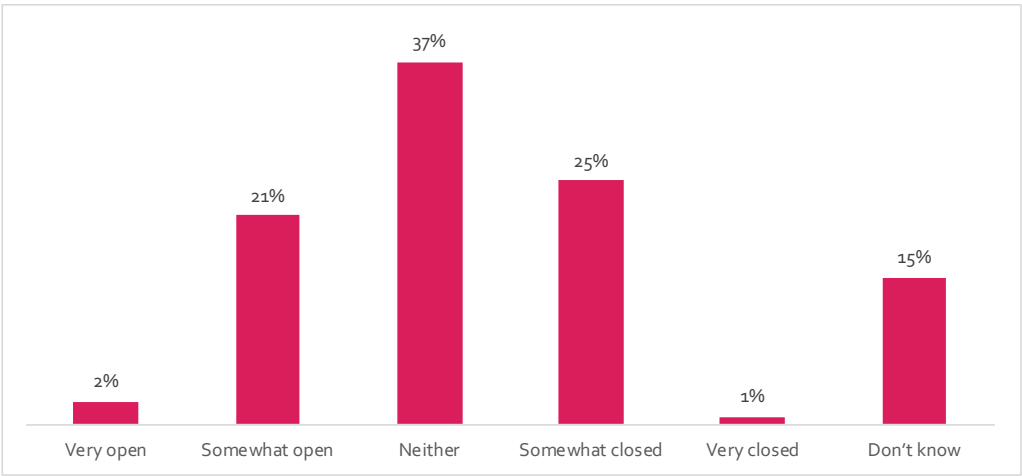
Figure 6: Do you trust information provided by the media in Cambodia?



University graduates want to be heard

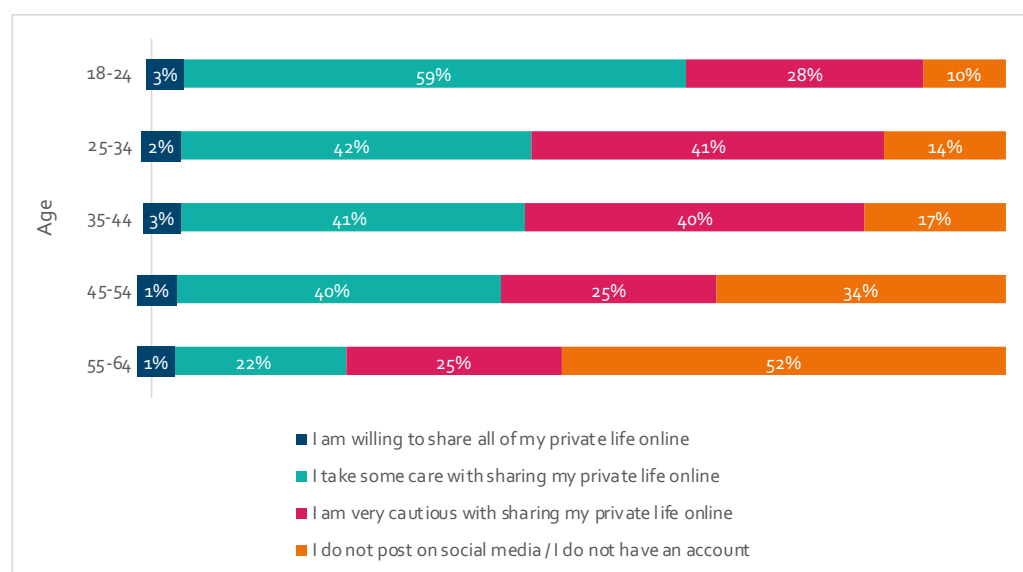
Responses were normally distributed as to whether the respondents felt open to sharing their opinion with roughly the same number of respondents feeling either open or closed to sharing their opinion. This was quite consistent across different regions, genders and age groups with the exception being 18-24 year olds who, at 30% ‘somewhat closed’ or ‘very closed’ and only 20% ‘somewhat open’ or ‘very open.’ Conversely, university graduates are open to sharing their opinion with 41% being ‘somewhat’ or ‘very’ open to sharing their opinion. This compounds the earlier statements that university graduates want to be open to voice their opinions more than others.

Figure 7: How open do you feel to share your opinion?



The number of respondents who do not post on social media or do not have an account is much higher among older respondents and slightly higher for females. But, when excluding these from analysis, there is little difference in the attitudes of those who post online across age groups or gender with only 18-24 year olds having a substantially higher openness to share. Similarly, there was a higher percentage of respondents in the Tonle Sap and Plateau and Mountains regions who reported not posting on social media or not having a social media account, yet, again when removing these from the data, there appears to be little difference across regions of the willingness to share their private life online. 42% of all respondents say that they take ‘some care with sharing my personal life online’ and only 2% report that they are willing to share ‘all of my private life online’.

Figure 8: Which of these statements do you most agree with? (by age)



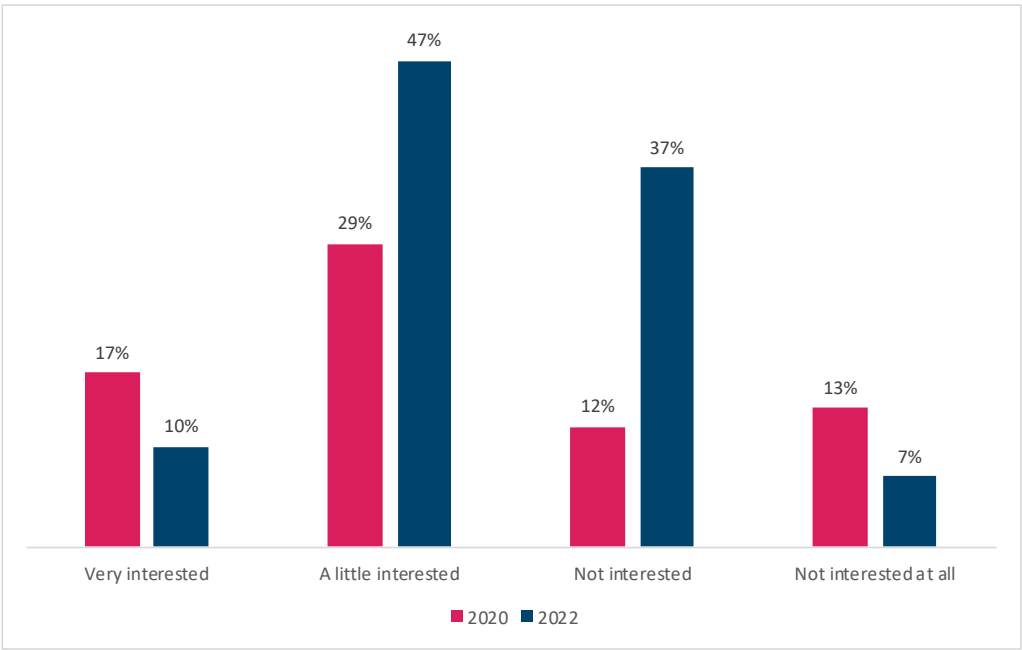
3.3 CIVIC ENGAGEMENT

This section of the report discusses interactions and participation in politics and society as well as voting habits.

University graduates are much more interested in politics than the rest of the population

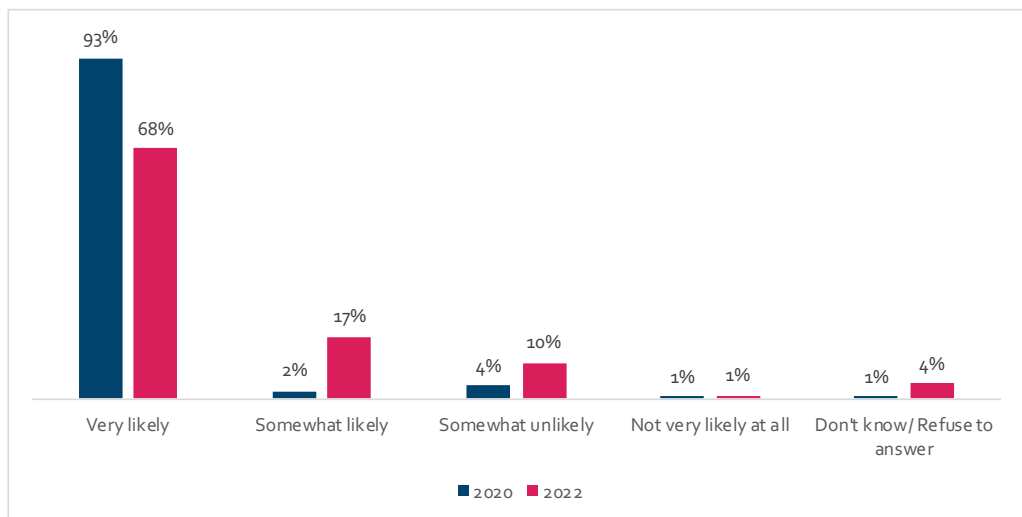
Fifty-seven per cent of respondents said that they cared about political issues a little or a lot, an increase on the 2020 results of 46%. Men report being more interested in politics than women with 61% of men being ‘very’ or ‘a little’ interested in political issues whereas only 50% of women reported being so. Overall, there was little difference between age groups although a slight trend towards more interest in older ages than younger ages, which is opposite to the findings of the 2020 research whereby younger respondents showed more interest than older ones. Where a clear trend appears is in the greater interest among persons with higher education as 74% of university graduates show ‘a little’ or ‘a lot’ of interest. In comparison, 43% of those with primary or no formal education, 53% with secondary education and 69% with high school education. There was also a slight difference between regions with the Plateau and Mountains region reporting a higher percentage of persons who were ‘very interested’ (19%) compared to the next highest regions (Coastal and Tonle Sap, each with 10%).

Figure 9: To what extent do you care about political issues?



There has been a large reduction in the attitude of people to vote between the results of the 2020 study and the 2022 results. In the year 2020 study, 95% of respondents said they were likely to vote in the next election, with 93% saying they were ‘very likely.’ In 2022, 85% reported they were likely to vote in the next election with 68% noting they were ‘very likely.’ This reduction in respondents saying they were ‘very likely’ could be partially due to the change in methods from face-to-face to telephone interviews. Perhaps over the phone and remotely, the respondents are more willing to be honest than in a face-to-face interview. Females reported being more probable to vote than men with 74% of women saying they were ‘very likely’ compared to 65% of men. Respondents in Phnom Penh also showed a higher aptitude to vote with 77% stating they were ‘very likely’ to vote, this also corresponds to university graduates whom 78% reported being ‘very likely’ to vote and 95% being ‘very’ or ‘somewhat likely.’ As in 2020, 18-24 year olds showed a lower interest in voting, as was noted then, this is possibly because they have only recently been legally able to vote and those at the bottom of this age group would not have had the chance to vote in the previous election. Since the data collection for this research was conducted, the national commune elections have occurred with a voter turnout of 80.3%, down slightly on 83.0% in the 2018 national elections.

Figure 10: How likely you are to vote in the National Election 2023?



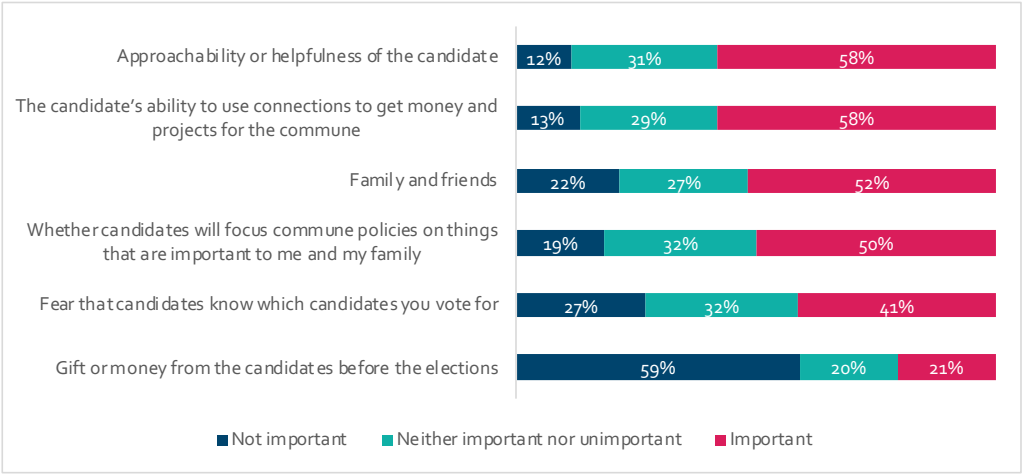
Factors which influence voting remain almost unchanged from 2020

As in 2020, respondents prefer to vote for a candidate for a variety of reasons, showing a preference for candidates who could help their community. Most often respondents cite the following as being either a little or very important to them; the approachability or helpfulness of the candidate (58%), the candidates’ ability to use connections to fund projects (58%), their family and friends (52%) and whether the candidates will focus commune policies on things that are important to them and their family (50%).

There was almost no difference between genders or education levels when it came to which factors influence how people vote. Whether ‘candidates will focus commune policies on things that are important to me and my family’ was correlated with the age of respondents and tended to appeal less to younger age groups and more to older ages as 18-24 year olds selected it as important or very important 44% of the time compared to 55-64 year olds who selected it 65% of the time.

Gifts or money from the candidates were less important in Phnom Penh (14%) and of more importance for Plateau and Mountain region (28%). The Plateau and Mountain region also put more importance on the approachability and helpfulness of the candidate than the other regions (71%).

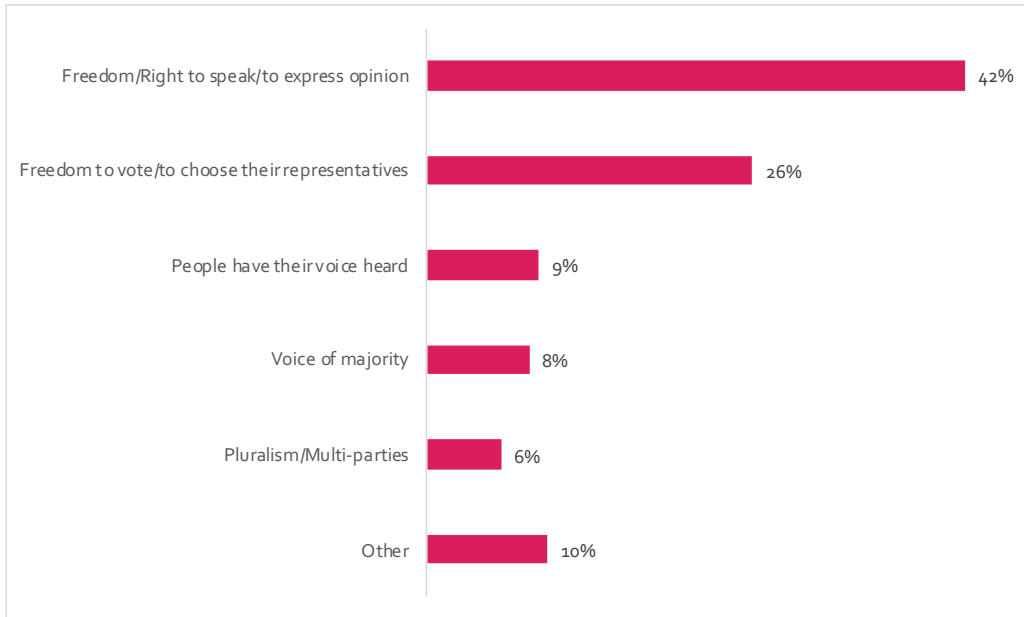
Figure 11: When deciding who you will vote for, which of the following factors influences you the most?



Democracy is the freedom to expression

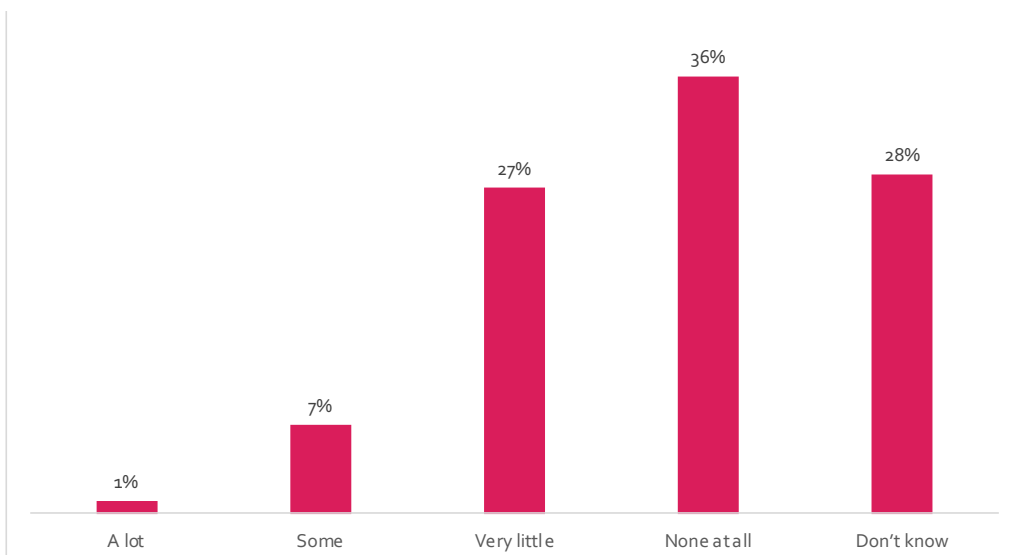
Forty-two per cent of respondents said that democracy is the freedom to express opinion, followed by 26% stating it is the freedom to choose their representatives. These results were similar across all respondent demographics.

Figure 12: If a country is called a democracy, what does it mean to you?



Respondents feel as though they have little influence over political decision making with more than a third stating that they feel none at all and another quarter feeling very little. This was quite consistent with few differences across all respondent demographics.

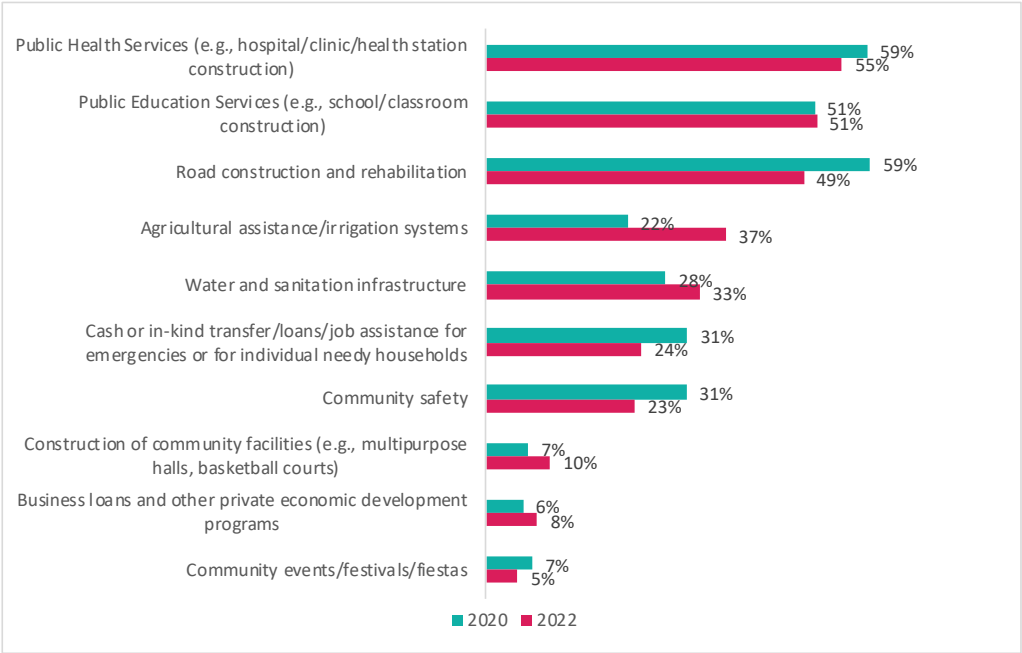
Figure 13: How much influence do you think you have over political decision making?



The needs for public spending remain unchanged from 2020

As in 2020, when asked how the government should allocate money or resources, the result in the 2022 study showed that respondents felt it should be spent on public health (55%), education (51%) and road construction (49%). Interestingly, although the economy is a primary concern of the respondents, they see other needs as being more important for spending. ‘Business loans and other private economic development programs’ was one of the least selected responses with only 8%. This option was selected more frequently by adults who have matured into work between the ages of 35-44 (10%) and 45-54 (12%). Public education was seen as more of a priority in Phnom Penh with 57% of respondents identifying it. Furthermore, water and sanitation infrastructure was also prioritised more highly in the capital with 33%. This is interesting as Phnom Penh has almost complete access to water infrastructure whereas this is not available in many other locations. Perhaps, the availability of it in the capital has made these residents realise the need for it elsewhere or COVID-19 and the increased need to wash hands could have conceivably made people in the capital realise the need for it more. Unsurprisingly, the Plateau and Mountains region identified the need for road infrastructure more than the other provinces with 55% of respondents here stating this. These north-eastern provinces in the mountains are among the most remote in Cambodia and road infrastructure in these provinces is often poor.

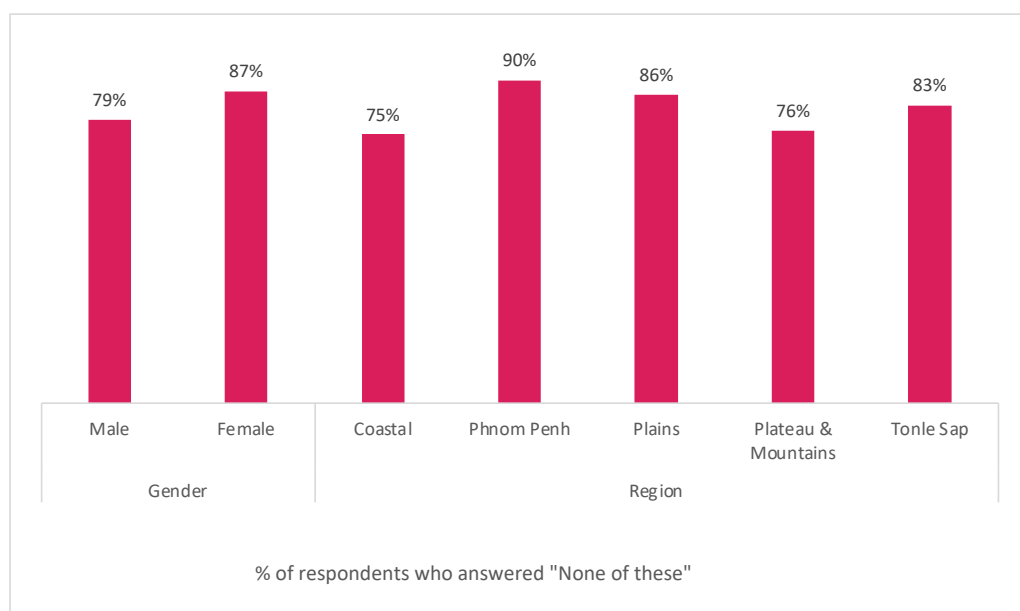
Figure 14: If it were up to you to decide how the government allocates money for your province, which of the following would you prioritize? (select 3)



Cambodians remain unengaged with societal and volunteer groups

It was found that very few respondents engage in any societal or volunteer activities. Of those who do, they were most expected to engage in an NGO (3%) or a cultural group (3%). Women were a lot less prone to engage in any societal or volunteer activity with 87% of interviewed women unengaged compared to 79% of men. Furthermore, individuals in the provinces were more likely to be engaged than persons in the capital as Phnom Penh had only 10% of persons engaged compared to 25% and 24% in Coastal and Plateau and Mountains regions respectively.

Figure 15: Have you participated in any of the following activities in the last 12 months? (by gender and region)



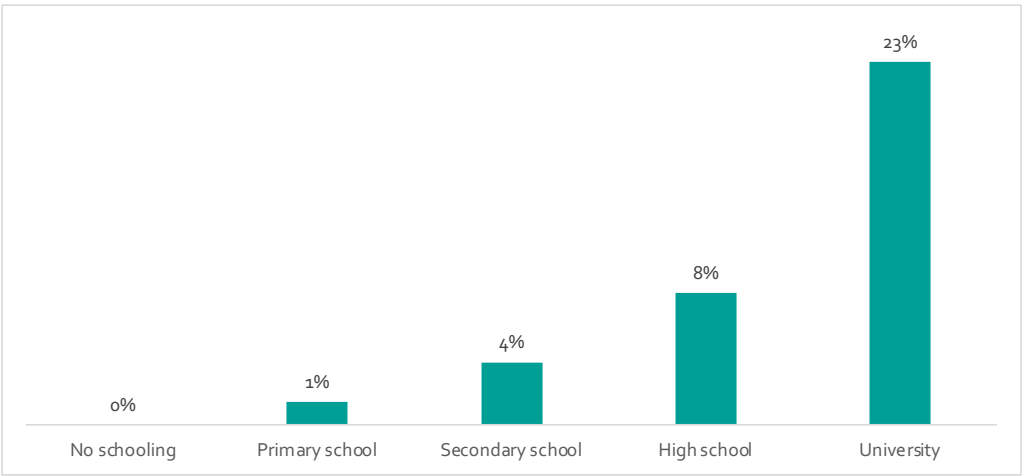
Cambodians prefer to deal with public administration face to face

In total 84% of respondents identified that they would prefer to deal with public administration face to face rather than digitally. Considering the overall education level of respondents, work from home policies and presumed digital literacy from the number of respondents who use the internet and social media, the authors anticipated that this result would be higher. Further exploration into why respondents prefer face-to-face interactions over digital ones could be of interest.

Diving into the different demographics, there was little difference between genders for this answer. In total, only 6% of respondents prefer to deal with public administration digitally over physically. Perhaps unsurprisingly, age showed a steady trend with a lower percentage of each age group preferring to interact with public administration as each group gets older starting from 10% of 18-24 year olds to only 1% of 55-64 year olds. Regionally, most regions were similar, however, Phnom Penh showed a greater interest in digital (13% compared to 6% nationwide). The demographic with the largest differences is among education levels. Those with no formal education never identified wanting to deal with public administration digitally, there was then a steady upward trend within each higher level of education until university graduates whom 23% preferred to deal with public administration digitally.

These regional, age and educational level results are to be expected as digital literacy in the country tends to be higher in those who are younger, more educated and located in the capital.

Figure 16: Do you prefer to deal with public administration digitally or physically?



3.4 INTERNATIONAL RELATIONS

The following section discusses how Cambodians perceive foreign countries in addition to Cambodian's understanding and proximity to ASEAN.

China is viewed as Cambodia's closest and best partner

With continued investment into Cambodia ties between the two countries are only becoming closer. These close ties were demonstrated clearly during the COVID-19 pandemic. Between February 2021 and the end of June 2021, during the key time of crisis, China donated 10,700,000 doses of COVID-19 vaccines to Cambodia which accounted for 97% of vaccine doses in the country at the time. Until the end of March 2022, China's Sinovac and Sinopharm vaccines account for 85% of total doses in the country. This helped Cambodia to become one of the most COVID-19 vaccinated countries in the world by the end of 2021 and undoubtedly assisted Cambodia in getting through the crisis. These close ties are proven in the results of the survey also. Seventy-three per cent of respondents identified China as the country with the closest ties to Cambodia. The next country on the list, Vietnam, had only 5% of responses. In the previous 2020 study, respondents were asked three questions on Cambodia's best partner for trade, foreign policy and infrastructure economy and public services which China accounted for 46%, 38% and 44% of answers respectively in a multiple-choice question. For the 2022 research, these questions were simplified to ask only which country Cambodia should try to continue to build a closer relationship with and was a single answer question only. China received 39% of the responses, quite closely in line with the previous research results. As in the previous study, the US (14%) and Japan (13%) are distant behind China, but close to each other in second and third place.

When removing those who 'don't know', there was a difference in the answers of both younger respondents and women, with both demographics preferring the USA more than other respondent demographics. Twenty-four per cent of 18-24 year olds preferred to build a closer relationship with the USA compared to 19% overall, and 23% of women compared to 16% of men. However, in each case, China was still the dominant reply.

Figure 17: Which country do you think is the closest partner to Cambodia’s foreign relations?²

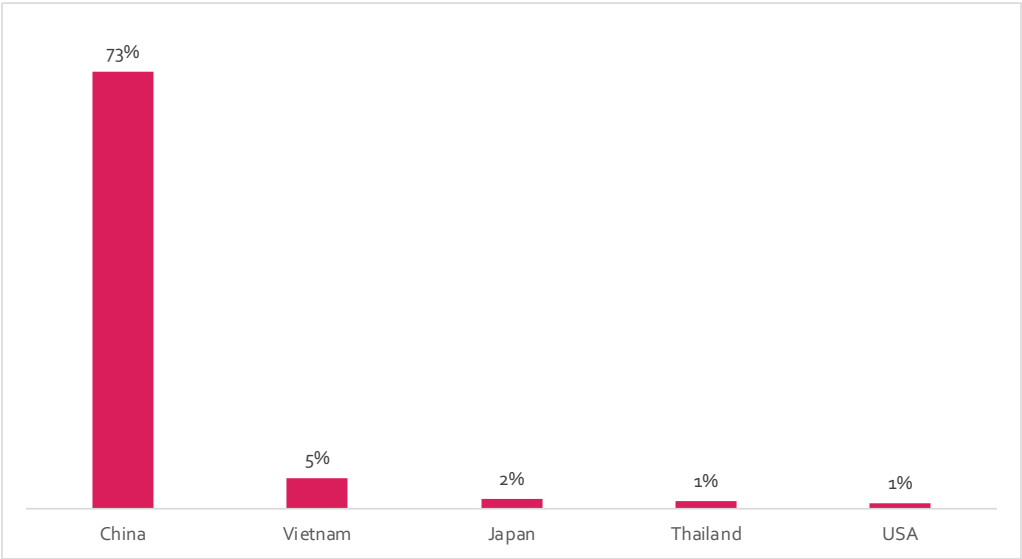
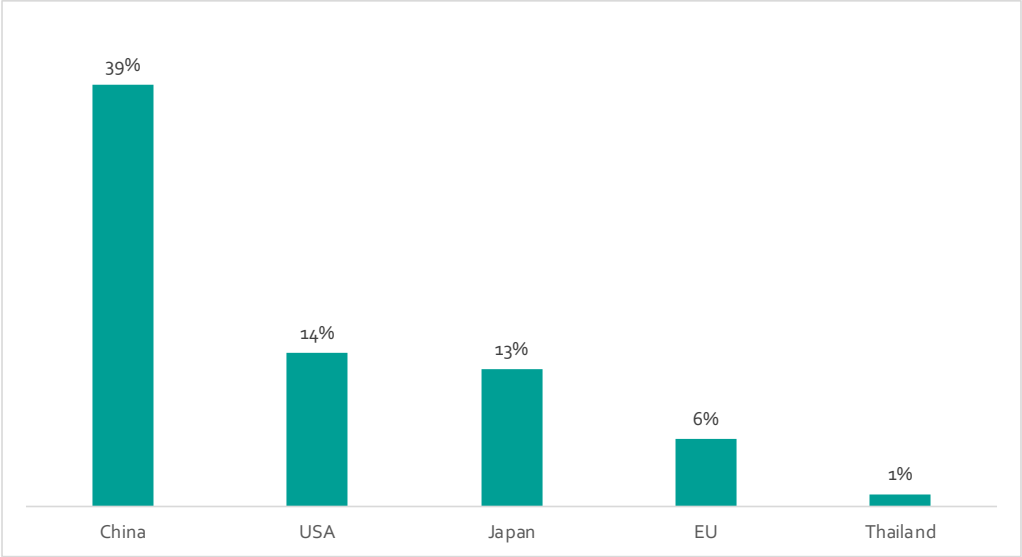
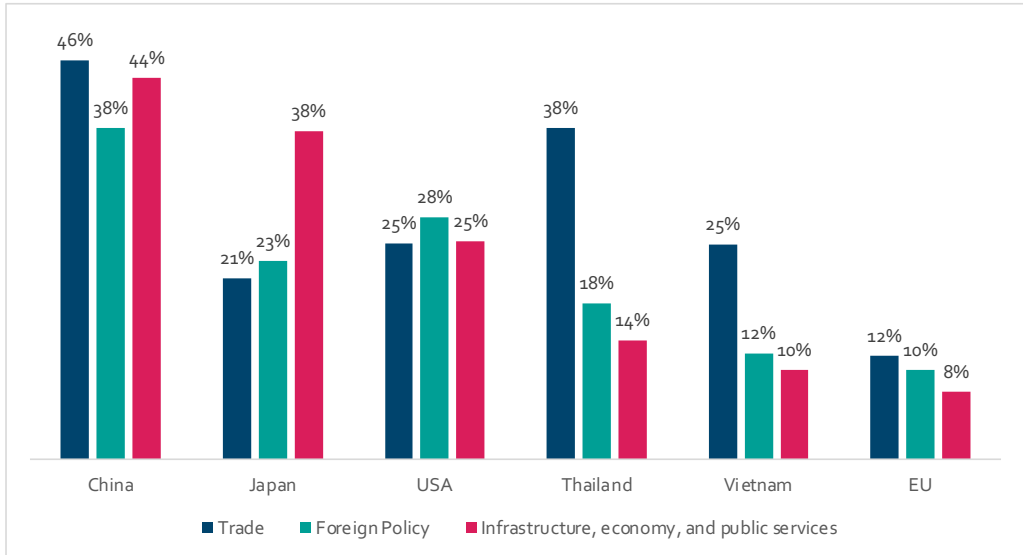


Figure 18: Which country do you think Cambodia should build a close partnership with?



² In the 2020 study, this was divided into three questions asking which country was Cambodia’s best partner for (1) trade; (2) foreign policy; and (3) infrastructure, economy, and public services. To make the combined 2020 data into as a single comparable data point, the results from each of the three questions have been averaged to provide the score for 2020.

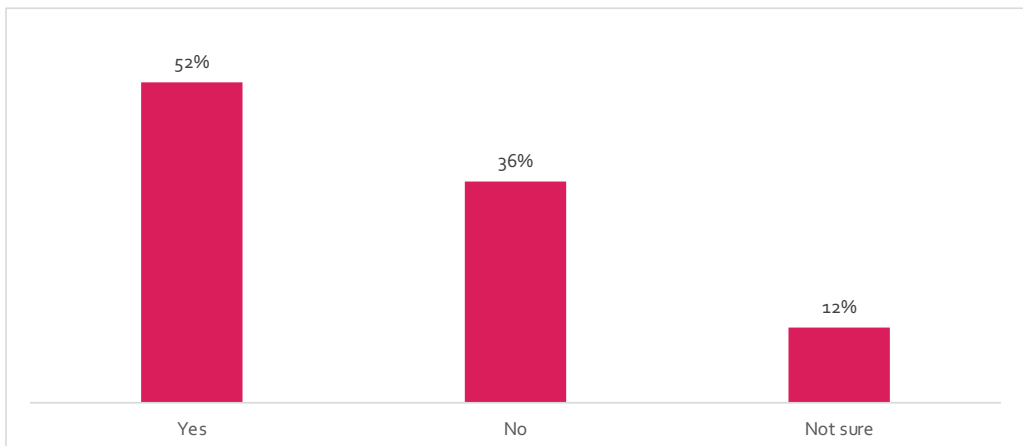
Figure 19: Which country was Cambodia's best partner for (1) trade; (2) foreign policy; and (3) infrastructure, economy, and public services? (Multiple answer questions from 2020 survey)



Half of all Cambodians report understanding what ASEAN is

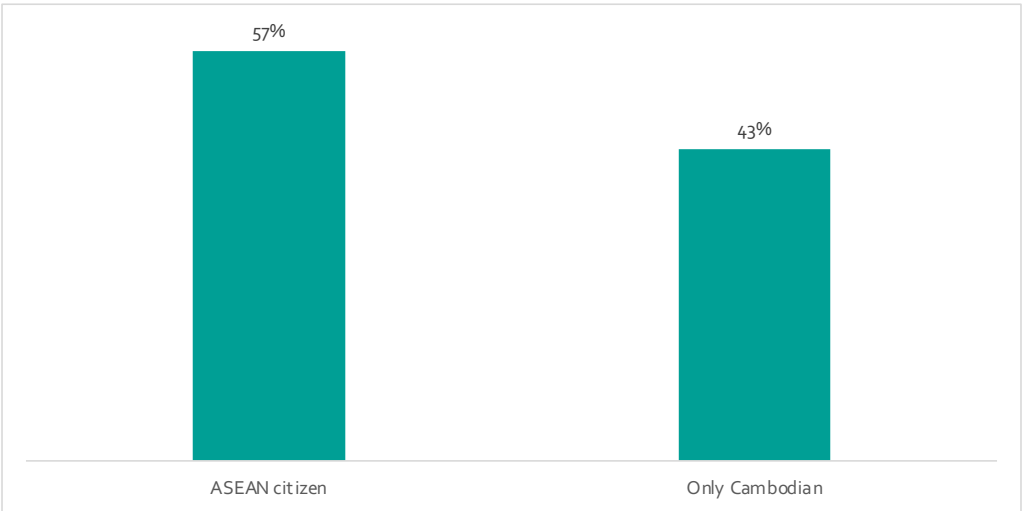
In total 52% of respondents reported knowing ASEAN. Knowledge of ASEAN increased with education levels with a low of 44% of those with primary education or less and a high of 79% among university graduates. There was a slight correlation with age groups whereby the youngest age group of 18-24 year olds were most probable to know ASEAN at 58% and 55-64 year olds the least likely at 47%.

Figure 20: Do you know what ASEAN is?



From respondents who know what ASEAN is, 57% of respondents think of themselves as an ASEAN citizen over being a Cambodian citizen. Though, including all who do not know ASEAN, this is only 28% of the population. This was higher among men (65%) than women (45%). Across age groups, 18-24 year olds were least likely to consider themselves as ASEAN citizens with a 50:50 split in those who consider themselves Cambodian or ASEAN. Across education levels, respondents who consider themselves as ASEAN changes substantially. Of individuals who have a primary education or less, 46% consider themselves ASEAN, this increases for secondary school and high school graduates and reaches a high of 68% among university graduates.

Figure 21: Would you consider yourself as a part of ASEAN Citizen or just your own nationality?



N=491 respondents who know ASEAN

3.5 THE ENVIRONMENT

This section seeks to understand Cambodians’ perception of the environment and key issues Cambodia is facing therein.

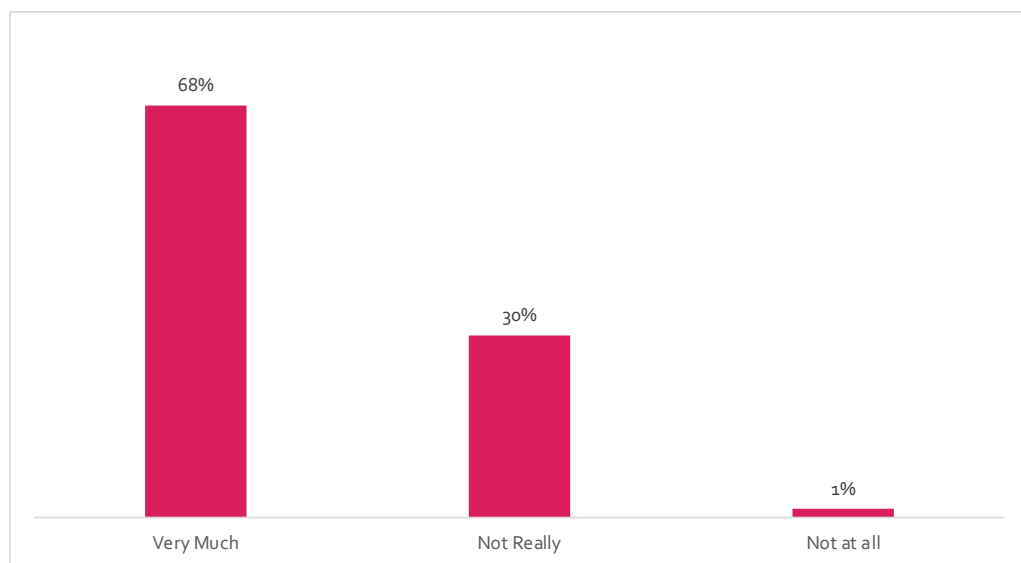
Environmental concerns growing among younger populations

In total, 68% of respondents reported caring ‘very much’ about the environment, and only 1% admitted not caring at all. There was almost no difference between male and female respondents. Phnom Penh residents reported caring more about the environment than other regions with 76% stating they care ‘very much’.



There was a trend that younger respondents reported caring ‘very much’ about the environment than the older respondents. Those aged 18-24 and 25-34 both at 71% stating they cared ‘very much’ compared to ages 45-54 and 55-64 reporting they care ‘very much’ 58% and 65% respectively. Although having everyone’s care would be optimal, it is hopeful that the younger generations growing up now are increasingly worried about environmental concerns than the older generations have been. Across education levels, results were similar to this question, with the exception being university graduates whom 90% reported caring ‘very much’ about the environment.

Figure 22: How much do you care about the environment?



Deforestation is the biggest environmental concern

Deforestation is most recognised environmental issue for Cambodia with 41% noting it as their main environmental concern. There is little variance in the issues noted among different age groups or gender in response to the question, however, regionally the environmental concerns of Cambodians are quite different. Deforestation was mentioned more frequently by those who live in the Plateau and Mountain region (55%) than in other locations and waste management was cited more frequently in Phnom Penh (41%). Waste management is also a more prominent concern for university graduates (39%) – although it should be noted that there is considerable overlap between these two demographics.

Figure 23: What do you think is the most important environmental issue among these?

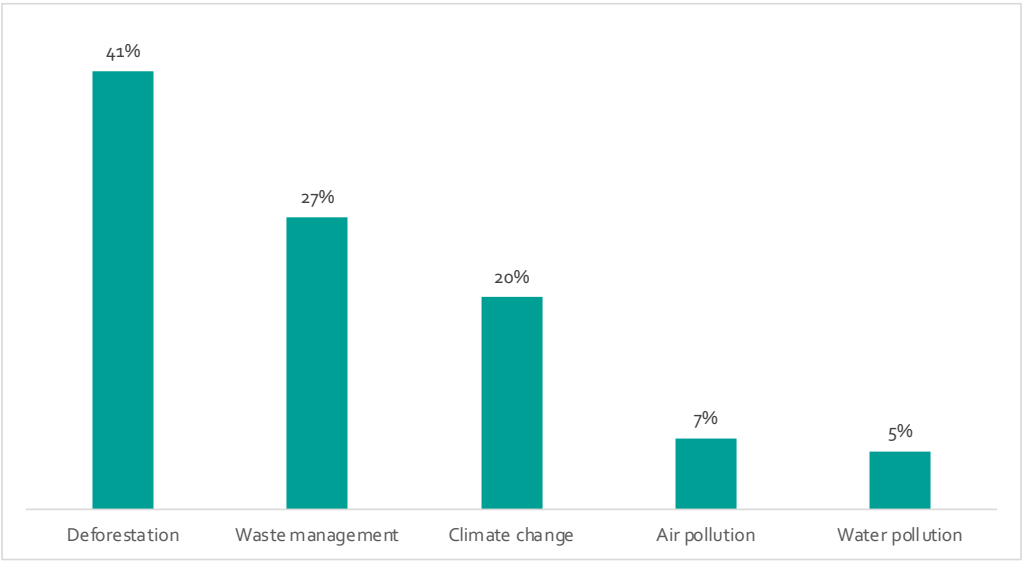
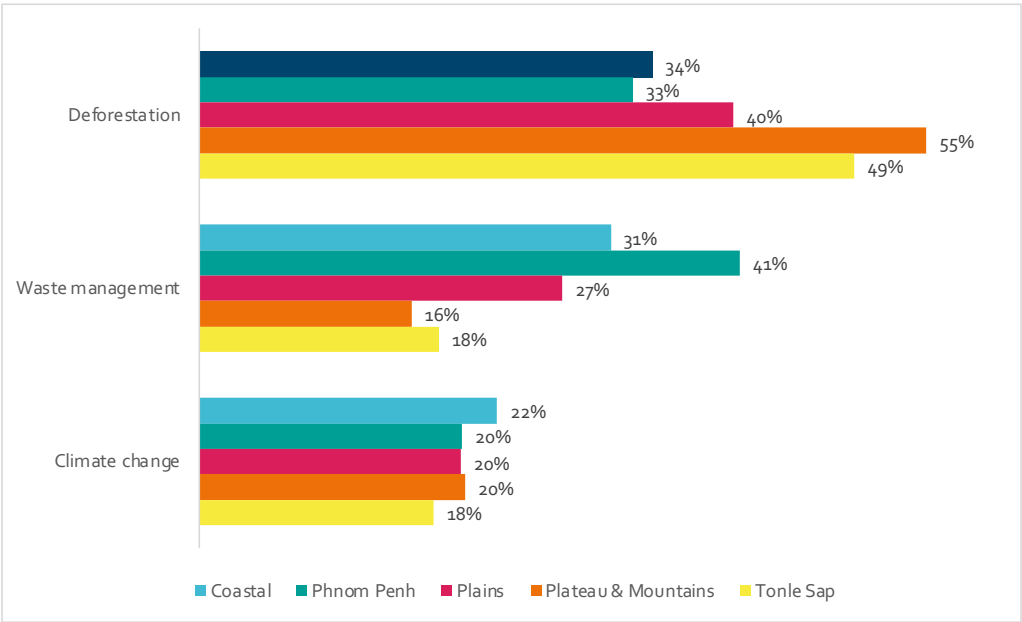


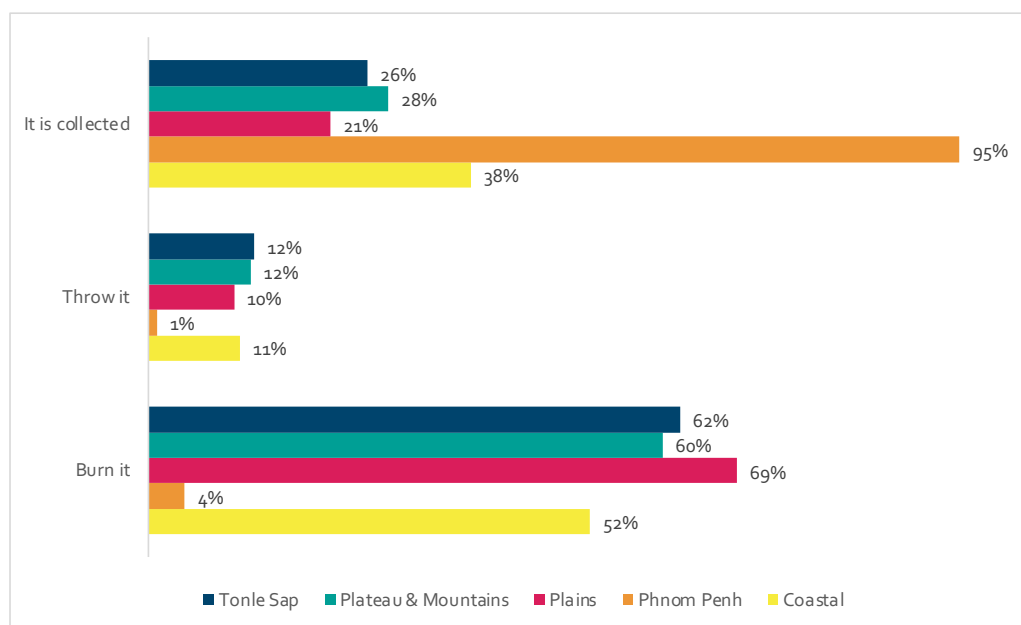
Figure 24: What do you think is the most important environmental issue among these? (by region)



Waste disposal is dependent upon infrastructure systems and education

There is a mixture of waste disposal, which appears to be largely dependent upon where the respondent lives. For Phnom Penh residents, 95% reported having their waste collected, whereas in the other regions this varied between 21% (Tonle Sap) to 38% (Coastal). Burning of waste is the dominant method of waste disposal in the other regions with between 52% (Coastal) to 69% (Plains) of the other regions disposing of waste this way. There was a higher incidence of women reporting that they burn their waste (56%) compared to men (47%) and of men reporting they throw their waste (10% of men compared to 8% of women) or have it collected than women (43% of men compared to 36% of women). It is unclear what reasons there could be for this divergence. University graduates are more likely to have their waste collected (71%) however, this high result is perhaps due to most university graduates living in Phnom Penh. What is of more note, is that only 1% of university graduates throw their waste, compared to 28% who burn it. This is a considerably higher ratio of burning to throwing of waste than any other demographic.

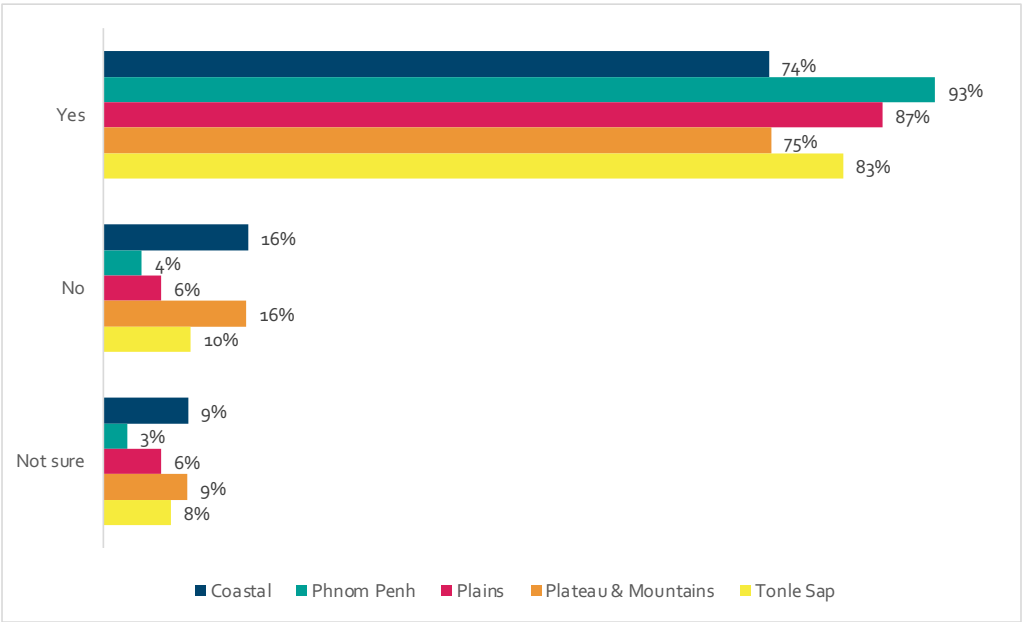
Figure 25: How do you dispose of your waste? (by region)



Eighty-three per cent of respondents believe that plastics present a serious environmental concern. This is fairly consistent across educational levels except for university graduates whom 96% think it is a serious concern. Females (87%) also more frequently reported it as a concern than males (81%). There was also a divergence in results among different regions as Phnom Penh residents (93%) reported it more than the other regions.

This continues the trend that waste management is a much more known and worried about the issue in the capital than in the remainder of the country. Perhaps as other regions are more inclined to burn their waste it is less noted than those who see it collected.

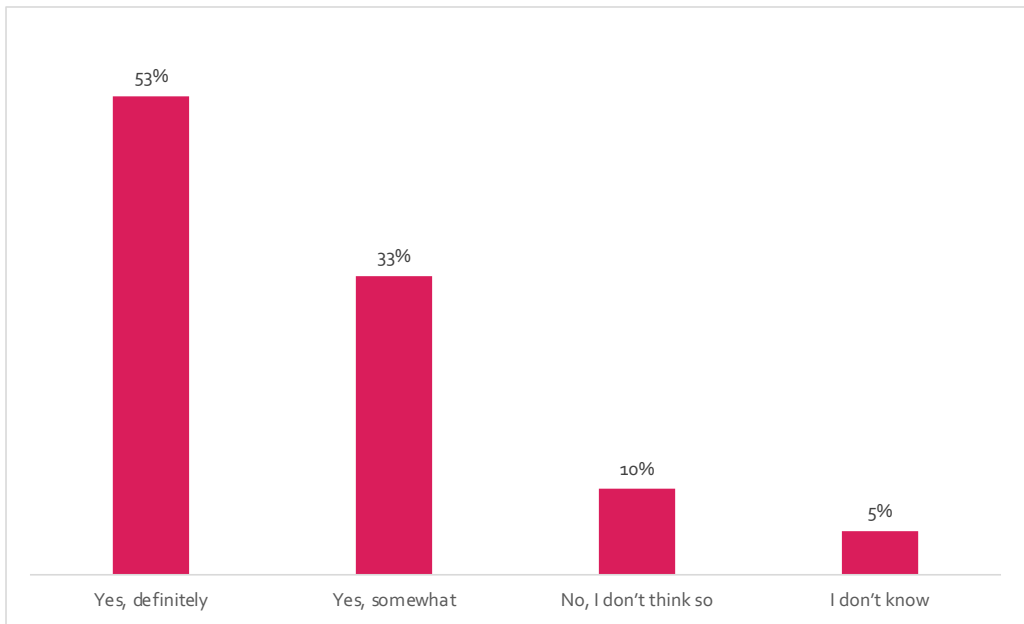
Figure 26: Do you think the growing use of plastics presents a serious environmental threat, or not? (by region)



More than half of the population believe that individuals can contribute towards environmental problems and solutions

In total, 53% of respondents think that individuals can contribute to environmental problems and solutions. This was almost the same between males and females, yet results differed across provinces. Phnom Penh residents were more prone to think that individuals could make a difference with 61% saying so. There was a slight correlation with younger ages agreeing that individuals could make a difference. Within separate educational levels, responses were similar, except for those who have a university education. They believed that individuals could definitely make a difference a lot more than others with 76% stating it.

Figure 27: Do you think individual action can contribute to the environmental problem and solution?



3.6 GENDER

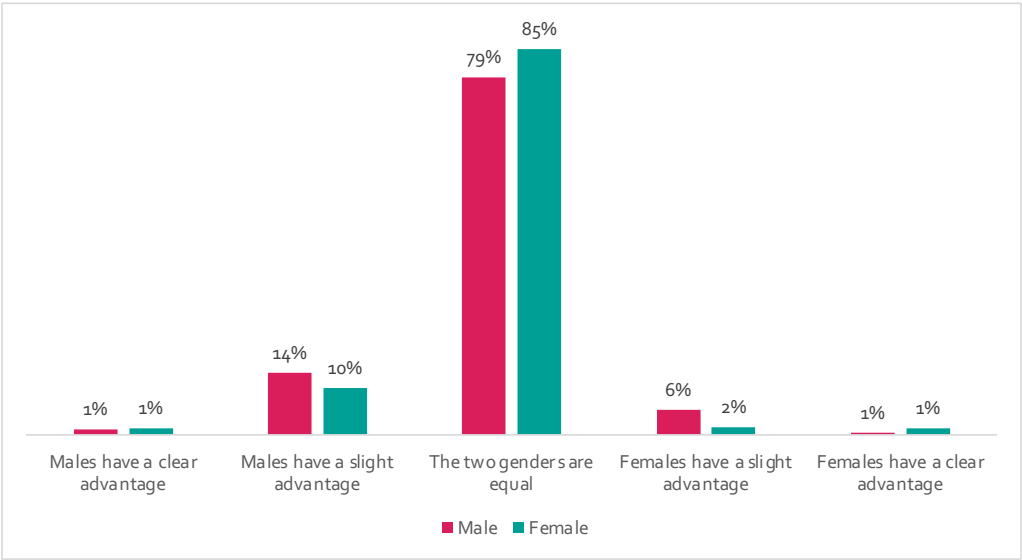
The final section of this report strives to understand Cambodian perceptions of gender roles and equality in the country today.

Most Cambodians think that men and women in Cambodia are treated equally

Eighty-two per cent of respondents suppose that men and women are treated equally. There are slightly more people who believe males have an advantage over females with 14% stating males have some advantage compared to 5% for females. Surprisingly, more men than women think that males have an advantage over females. As education levels increase, more respondents think that men have an advantage. Only 8% of those with primary education or lower believe that men have an advantage, this increases to 13% for persons with secondary education, 18% for high school graduates and 22% for university graduates.

Across most results in this report, income brackets have not necessarily followed education levels as only 26% of individuals who make greater than \$800 USD per month are university graduates. However, concerning gender equality, those with higher incomes closely match those with higher education. Seven per cent of persons with an individual income of less than \$400 USD per month found that men have at least a slight advantage, this increased to 13% of those who make \$401-600 USD, to 17% among persons who make between \$601-800 USD and up to 26% of individuals with a monthly salary greater than \$800 USD. The authors propose that perhaps due to the presumably higher positions those with greater salaries make, they may be more aware of the ways in which women are held back. Across age groups, there was little difference between the percentage of respondents who held that males had an advantage, but interestingly as respondents grow older they were more probable to say that women had an advantage as this increased from 4% among 18-24 year olds up to 9% of 55-64 year olds. With 19%, more respondents in Phnom Penh said that males had an advantage than in the other regions, it is expected that this coincides with individuals who are more educated and who make greater income, and this is not necessarily due to the location itself.

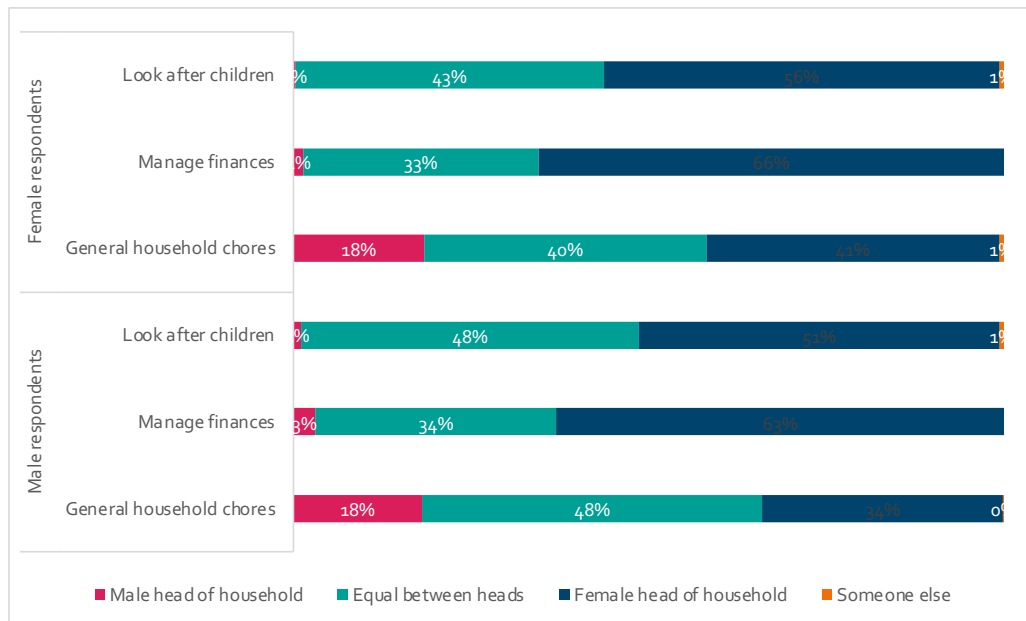
Figure 28: How equal do you feel males and females are treated in Cambodia? (by gender)



There is an indication that poorer and less educated households share household tasks more than wealthier or higher educated ones

In total, 44% of respondents believed that women took charge of general household chores, 34% managed finances and 46% looked after children. Male respondents tended to think that responsibilities for these household tasks were shared more often than females on all three tasks. Respondents in the Plateau and Mountain region more often reported that males took care of the general household chores than in other parts of the country (35% in Plateau and Mountain compared to 18% nationwide). There was a slight correlation that respondents with lower education levels or lower income levels tended to report sharing in the three tasks more often than those with higher education or higher incomes where the female head of household more often takes over.

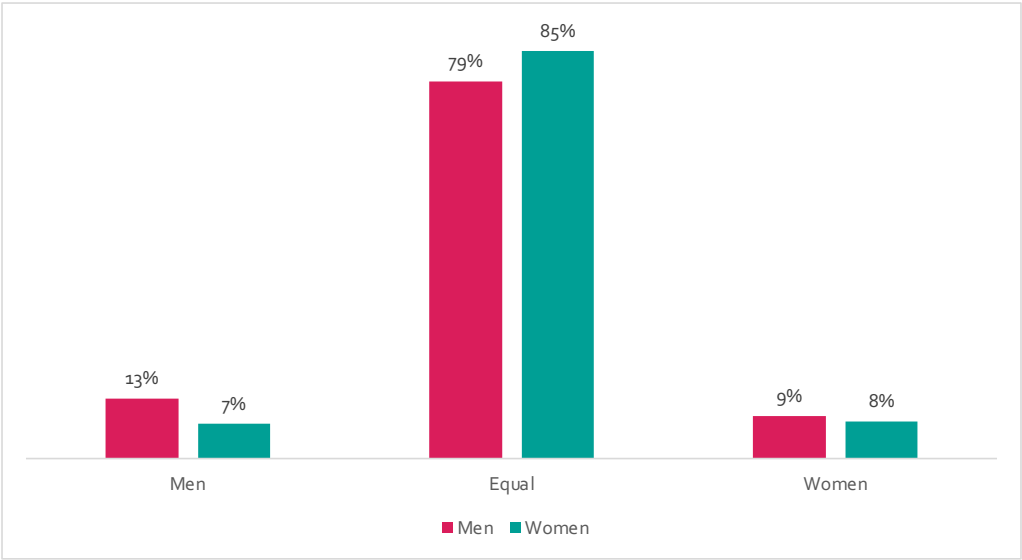
Figure 29: Who usually completes each of the following tasks in your household? (by gender)



Men more often think that men are better leaders than women

Almost twice as many men as women think that men are better leaders than women. As incomes rise the disparity closes and persons whose income is greater than \$800 USD per month slightly favour women (10% think that women are better leaders compared to 9% who think men). Among educational achievements both males and females with primary schooling or less believe that men are better leaders. Individuals with secondary education, both males and females more often consider that women are better leaders. For high school graduates, males slightly more often said that males make better leaders whereas females clearly selected women. University students on the other hand had polarising viewpoints. Male university graduates more often thought that men (18%) made better leaders than women (5%). On the other hand, female university graduates more often stated that women (15%) made better leaders than men (9%). Follow up research to this study could try to understand why there are such opposing views by different genders of university graduates towards leadership.

Figure 30: Who do you think are better leaders’ men or women? (by gender)



4. CONCLUSIONS AND RECOMMENDATIONS

Based on these findings, the authors suggest the following recommendations for policymakers and stakeholders in Cambodia.

1. EDUCATION

A key takeaway of this research is that education can make a huge difference in a person's beliefs. Across all sections, university graduates thought differently from the rest of the population. Their interest in political issues, willingness to share their views yet less trust in the media, understanding of environmental and gender concerns are different from the rest of the population. These critical views show the importance of education.

2. ECONOMIC CONCERNS

The population is very concerned with inflation and a stagnating economy, particularly with regards to rising gas prices. The government should look towards how rising gas prices can affect the population and possibly look into how this economic shock may be able to be lessened. Previously, during COVID-19, IDPoor was used to identify vulnerable persons and to provide them with cash transfers of \$30 per month (plus additional payments for other vulnerabilities, for example, for disabled household members and those with HIV). A similar system could be implemented should this economic shock continue to effect the country.

3. ENVIRONMENTAL ISSUES

Understanding of environmental concerns is mixed. In particular the issues of waste management and single use plastics are still not well understood by those in the provinces. The government should continue to promote good environmental practices among those of lower economic status in more remote areas in order to protect the country's natural resources. Community champions of change should be identified and used as well as billboards or TV/radio spots which were previously used to disseminate information on COVID-19 (i.e., the 3 do's and 3 don'ts which were so well publicised), could be transferred to this important issue in order to change the public's understanding.

4. DIGITAL INNOVATION

Results from the survey question whether digital public administration can be easily integrated. Further understanding and research should be followed up to understand why Cambodian's still prefer face-to-face administration. This additional knowledge could help the government integrate these preferences into future digital administration tools.

5. UNDERSTANDING OF GENDER

The differences in gender in Cambodia, particularly the disparity between male and female university graduates should be explored. Understanding of why male and female graduates believe their own gender to make the better leaders could be of interest for further research.

5. APPENDIX

5.1 METHOD

Random digit dialling (RDD) is a method that can be used to conduct general population studies, as it allows researchers to create a sample frame that represents everyone with access to a phone in a population, rather than only those who are listed in a phonebook or have shared their phone number with another source. As random digit dialling does not require researchers to gain access to existing lists of phone numbers, it is one of the fastest and simplest ways to create a sample for researchers who do not have an existing sample source.

Using public information, Spear Insights identified all of the mobile prefixes for each of the three networks (Smart, Metphone & Cellcard) in Cambodia. A formula then randomly generated lists of unique numbers for each of the prefixes. This ensures that every mobile number within Cambodia has an equal opportunity of being selected and reduces the risks of selection bias.

Without knowledge of the exact market share of each of the three network operators, Spear Insights generated phone numbers assigned to each of the three major networks in equal measure. It is understood that each of the three phone networks has different brand images and with that, different consumer bases. As such, without knowing the market share of each of the brands the full sample cannot be fully representative. However, the authors believe that the data collected is a close representation of the population of Cambodia and closer to actuality than the previous study which utilised data collection in five provinces and weighted these results to represent the entire country.

Once the list of phone numbers was finalized, the lists were divided by the number of enumerators on the project and provided to them for survey administration. During this stage, each interviewer was provided with a unique list of mobile numbers in a randomised order. The interviewer, equipped with a mobile phone to make calls and a tablet to record answers, then undertook the interviews and tracked the results of each call.

Respondents for this study could be any person as long as they were between the ages of 18-64. The survey began with informing the respondent of the research, asking for their consent and then screening their age to confirm their applicability. If the respondent was above or below these ages they would be thanked for their time and terminated from the study.

Once a survey was completed, the used phone number was recorded and provided to the management team who provided a \$2.00 USD incentive as a mobile phone top-up to the respondent to thank them for their participation.

5.2 SAMPLE LIMITATIONS

In total, N=1,000 interviews took place across all provinces in Cambodia. Due to the random selection, the results roughly match that of the country's population. Some differences compared to the actual population undoubtedly occurred. From the data, some diversions from the actual population are clear:

Gender: The population gender split of Cambodia according to the World Bank in 2020³ was 49% male to 51% female yet the data in this report resulted in a 58% to 42% split of males to females. This could be the result of many factors, perhaps males are more likely to have multiple phone numbers and thus have a greater chance of being selected when random phone numbers are called. Another factor could simply be that men were more available or responsive to answering a stranger's call.

Income: The respondents of this survey have a wide range of incomes. The incentive of \$2 USD provided to respondents who completed the 10-15 minute survey was probably a strong incentive to join the survey for many in the country. However, with this budget, high salary individuals would be less likely to have been incentivised to join the survey.

Locations: Although the survey could reach persons in all provinces of the country, rural locations are still prone to poor phone reception. As such, urban locations tend to be oversampled, in particular, Phnom Penh.

³ <https://data.worldbank.org/indicator/SP.POP.TOTL.MA.ZS?locations=KH>

Figure 30: Survey sample by location compared to census data

Province	2019 Census	Survey Sample	Difference
Banteay Mean Chey	5.6%	4.3%	-1.3%
Battambang	6.5%	6.2%	-0.3%
Kampong Cham	5.9%	6.6%	0.7%
Kampong Chhnang	3.4%	5.2%	1.8%
Kampong Speu	5.7%	6.7%	1.0%
Kampong Thom	4.4%	5.7%	1.3%
Kampot	3.9%	4.0%	0.1%
Kandal	7.8%	6.7%	-1.1%
Koh Kong	0.8%	0.9%	0.1%
Kratie	2.4%	2.1%	-0.3%
Mondulkiri	0.6%	0.9%	0.3%
Phnom Penh	13.9%	18.7%	4.8%
Preah Vihear	1.6%	2.7%	1.1%
Prey Veng	6.9%	4.7%	-2.2%
Pursat	2.7%	2.0%	-0.7%
Ratankiri	1.3%	0.9%	-0.4%
Siem Reap	6.6%	7.0%	0.4%
Sihanoukville	2.0%	1.8%	-0.2%
Stung Treng	1.0%	0.9%	-0.1%
Svay Rieng	3.4%	2.7%	-0.7%
Takeo	5.9%	4.2%	-1.7%
Oddar Meanchey	1.7%	1.6%	-0.1%
Kep	0.3%	0.6%	0.3%
Pailin	0.5%	0.3%	-0.2%
Tboung Kmoum	5.1%	2.6%	-2.5%

It should be noted that the data from this study has not been weighted to accommodate these limitations. Without mobile network brand share, accurate national income data or more precise locational data (i.e. urban or rural), the authors believe that it is difficult to weight the data to achieve a more accurate result than the raw data provides. This research is not aiming for infallible statistical accuracy, but instead, to show trends and provide an indication of Cambodian perspectives on key topics. The anonymised data from this research will be freely available should any researcher decide to weight the data to improve the accuracy of the results herein.

5.3 METHODOLOGY STEPS

The following steps were undertaken during the project:

1. Desk review: A literature review of reports and other relevant documents was conducted to form the foundation of the evaluation before commencing fieldwork for data collection and data analysis.

2. Questionnaire creation and translation: The questionnaire used in this study was created and translated in partnership between Spear Insights and Konrad-Adenauer-Stiftung (KAS). The survey questions were created to answer each of the research questions set out above.

3. Programming of the questionnaire into KoBoToolbox survey tool:

KoboToolbox was used as it is simple to use for enumerators and allows data collection through offline mobile devices while in the provinces. The questionnaire was programmed in both English and Khmer as although it was administered in Khmer, some testing of the programming and analysis of the final results was completed in English.

4. Testing and internal pilot tests of the software: Usability of the survey, skip logic and typos were tested during internal testing of the software.

5. Two-day fieldwork training: The training occurred in Phnom Penh over two days to ensure that each enumerator had a clear understanding of the research's objectives, respondent sampling, the format and flow of the questionnaire, quality assurance and data monitoring. The training took place under the following guidelines.

- a. Morning day 1: Background and overview of the study and explanation of the sampling methods. A first guided read-through of the questionnaire.
- b. Afternoon day 1: Additional read-throughs of the questionnaire. Q&A with the enumerators.
- c. Morning day 2: Roleplaying of the survey using the KoBoToolbox software.
- d. Afternoon day 2: Final interview testing with each of the enumerators.

6. Pilot testing of methods: As this method of data collection was new, the team conducted 3-5 days of initial fieldwork before launching into the full-scale field work. The intention was to make sure that phone calls were resulting in completed surveys, that the responses received were high quality, and that respondents were geographically diverse.

7. Data collection undertaken by the field teams: Spear Insights fieldwork team consisted of 8 enumerators. After training and the initial fieldwork pilot testing finished, the fieldwork began in earnest.

8. Data monitoring and cleaning: The fieldwork manager completed daily check-ins with the project management to discuss progress and any issues that occurred during the fieldwork. In addition, the Spear Insights project management team monitored the data daily checking interview length, logical responses and the quality of answers.

3.Programming of the questionnaire into KoBoToolbox survey tool:

KoBoToolbox was used as it is simple to use for enumerators and allows data collection through offline mobile devices while in the provinces. The questionnaire was programmed in both English and Khmer as although it was administered in Khmer, some testing of the programming and analysis of the final results was completed in English.

9. Analysis of results upon completion of fieldwork: Data was exported into excel from KoBoToolbox and then imported into SPSS for cross-tabulation of response criteria and data analysis.

5.4 QUALITY CONTROL

The following fieldwork quality control processes were adhered to:

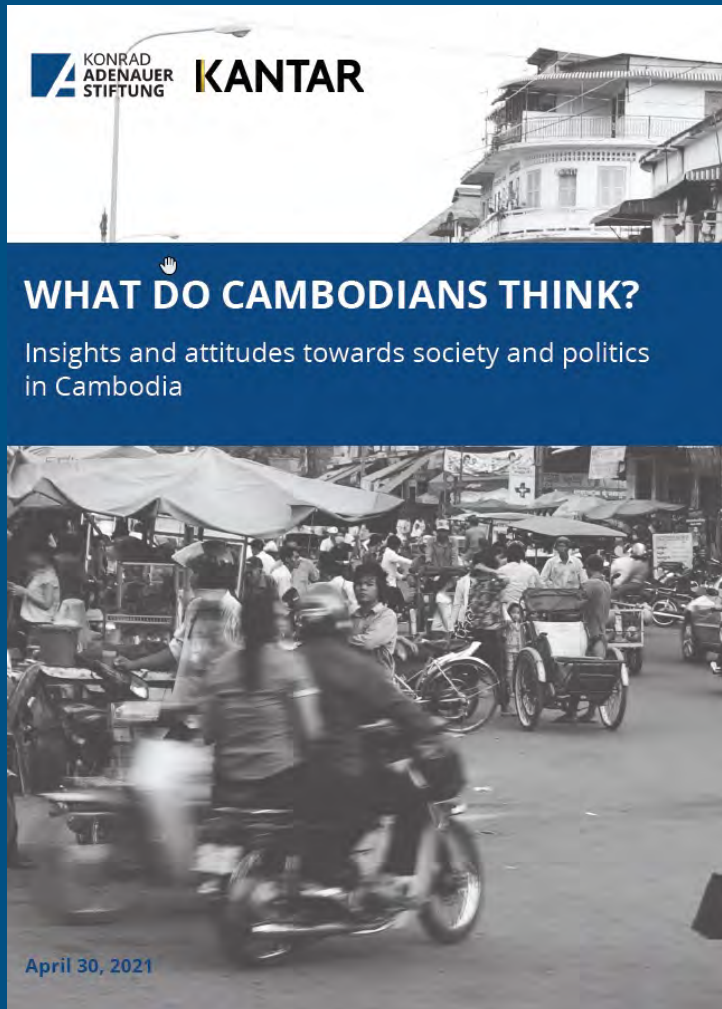
- > **Automated data quality checks:** The survey automatically checks that answers fall within expected ranges and match provided options.
- > **Quality control dashboard:** The quality control dashboard provides survey performance metrics, enabling the team to track both survey and individual interviewer performance. Metrics tracked include completed interviews per day, refusal rates, and length of interviews.
- > **Manual quality control checks:** Before data was finalised, manual data cleaning and quality control checks including removing duplicates, identifying outliers, removing nonsense answers, categorizing open-ended answers, and ensuring all answers are coded properly occurred.
- > **Interviewer training:** All interviewers went through extensive, project-specific training which includes practice interviews, answering difficult respondent questions, and more.
- > **Observations and recording listening:** A percentage of all interviews are observed in person by our fieldwork supervisors. Other interviews are recorded and re-listened by our management team to ensure data quality at the point of interview.

WHAT DO CAMBODIANS THINK? - 2020

Edited by Emily Southall, Channarak Nget, Chanbormey Long, Maurizio Paciello, Isabel Weininger

What are the biggest issues Cambodians face in their daily lives today? What types of media do Cambodians consume when it comes to current affairs? How likely are people to vote in the next general election? Which countries are viewed as good partners for Cambodia on the international stage and what do Cambodians think of the European Union (EU)?

These are the questions that Konrad-Adenauer-Stiftung (KAS) Cambodia together with Kantar have set out to answer in this survey. In October 2020, researchers interviewed 1015 respondents across Cambodia's five main geographic regions: Phnom Penh, Plain, Mountain, Tonle Sap and Coastal region.





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