

ADA Telco Business Insights Report August 2020

South and Southeast Asia



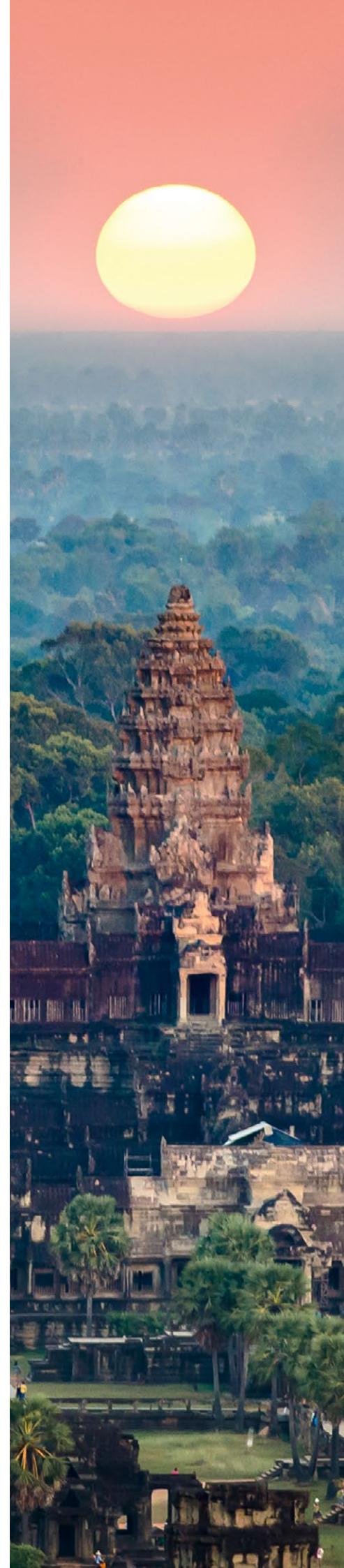
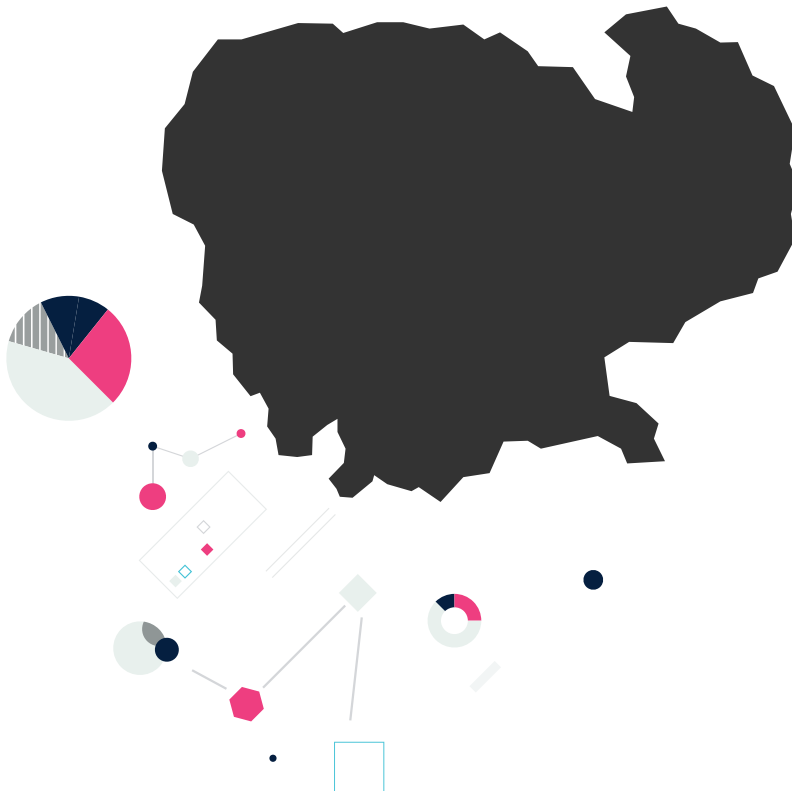
How you can benefit from this report

ADA's **Telco Business Insights Report** aims to provide a macro view of the telco industry across South and Southeast Asia. Every report deep dives into a country in focus to document shifting trends and differences across the nine markets we operate in.

The [Telco Business Insights Dashboard](#) is designed to help telco network providers monitor their market share and performance against that of their competitors. The dashboard is powered by [XACT](#), ADA's proprietary Data Management Platform (DMP), which captures a vast pool of anonymous mobile-first data across the region from 375 million unique devices, 400,000 unique apps and 1 million places-of-interest (POI).

This report's country in focus is **Cambodia**, but will also provide an overview of the telco industry across nine countries in South and Southeast Asia as well as highlight useful findings from the Cambodian telco landscape.

Readers will be able to gain deeper insights from a range of information pertaining to telco operator preferences and market share, brand switching movements, top multi-SIM combinations, and a look into the Cambodian smartphone users' top interests.



Telco Operators Market Share

in ADA markets across South and Southeast Asia for May 2020

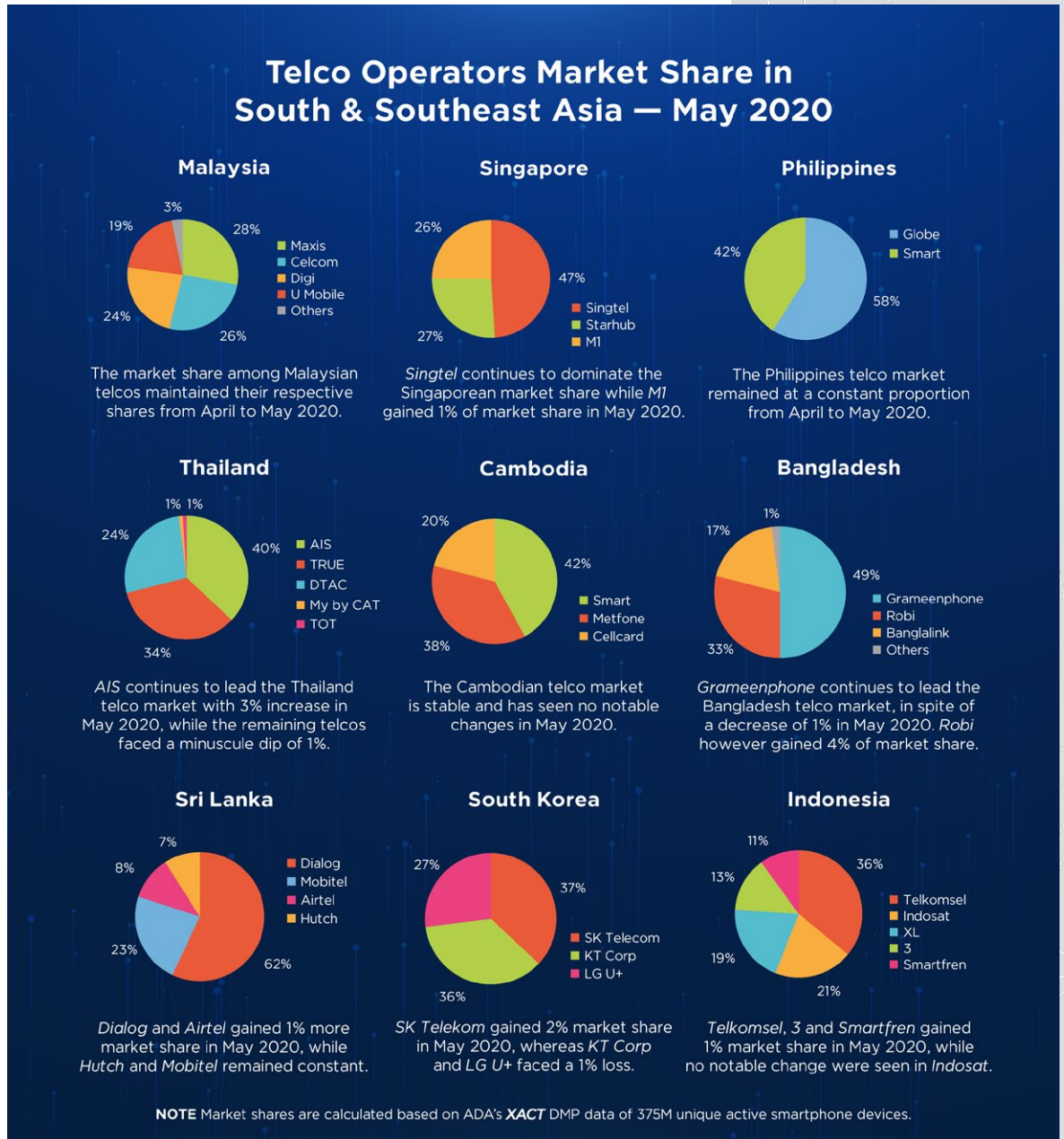


Fig 1. Telco Operators Market Share in South and Southeast Asia

A Deep Dive into Cambodia's Telco Market

Smart is the market leader in Cambodia followed closely by *Metfone*.

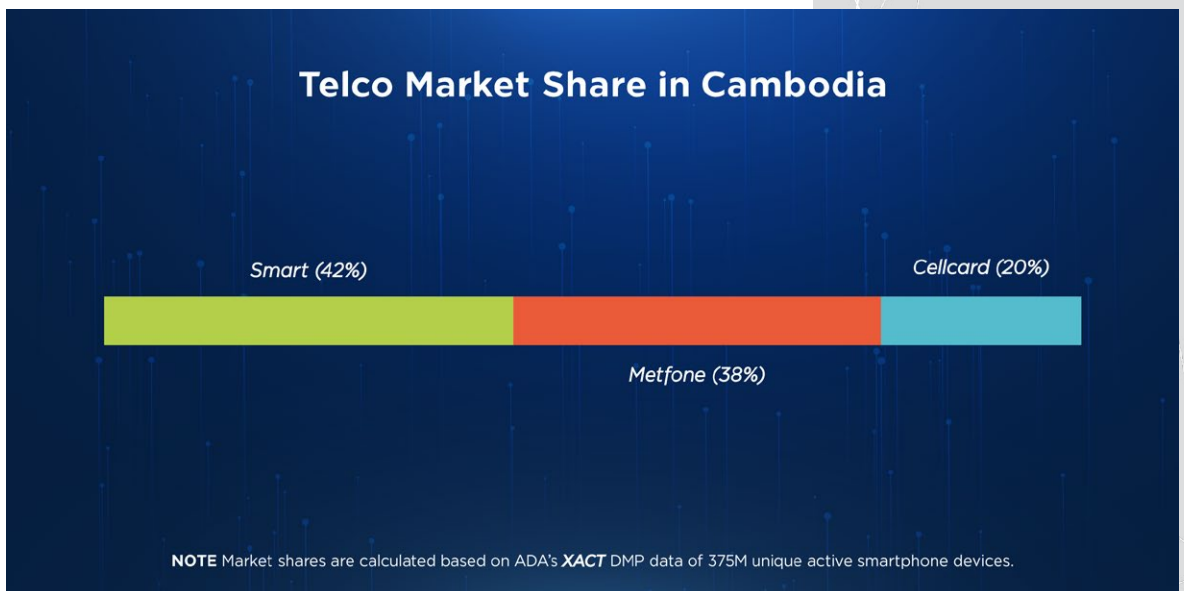


Fig 2. Telco Market Share in Cambodia

In the telco space, *Smart* is in the lead, holding 42% of total market share in Cambodia. *Metfone* is in the second position with 38% market share and *Cellcard* tails in third with 20% market share.

Telco Operators Market Share in the Top 10 Provinces in Cambodia

Smart takes the lead in the overall market share, however *Metfone* comes in at a striking distance and captures a large market share specifically in Kampong Thom.

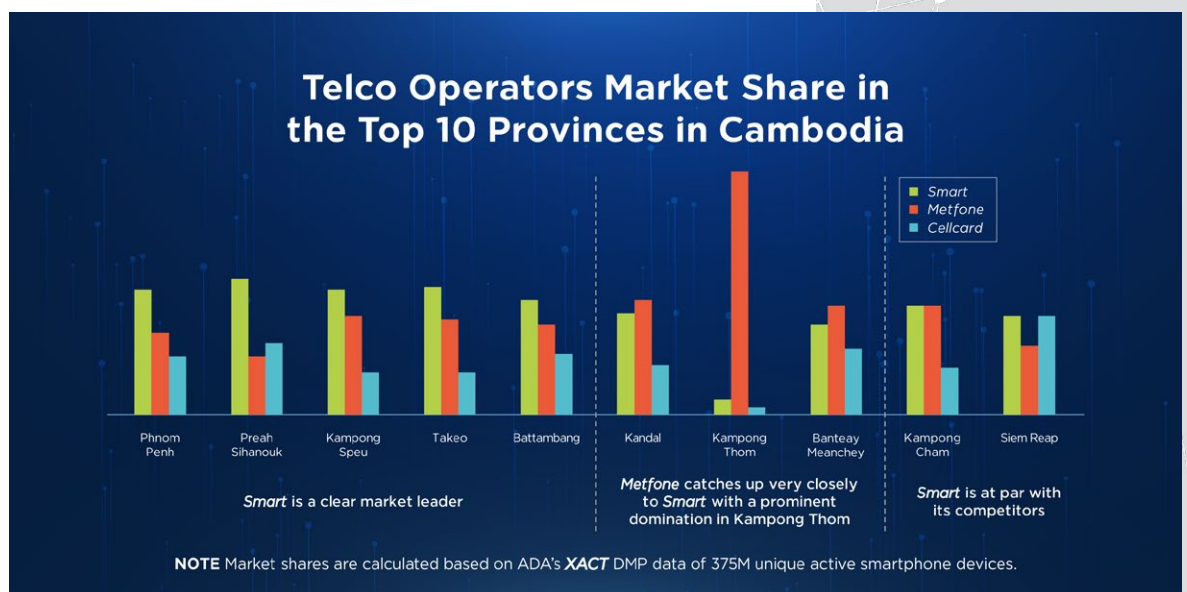


Fig 3. Telco Operators Market Share in the Top 10 Provinces in Cambodia

Smart dominates the highly populated provinces such as the capital city, Phnom Penh, Preah Sihanouk, Kampong Speu, Takeo, and Battambang. The highest percentage of *Smart* users are noticed in Preah Sihanouk.

It is evident that *Metfone* is the strongest competitor to *Smart* where *Metfone* market share dominates in Kandal, Kampong Thom and Banteay Meanchey. *Metfone* and *Smart* appeared to be at par in Kampong Cham.

Cellcard appears in third place in most provinces, however its biggest market capture is in Siem Reap, where they surpassed *Metfone* in Siem Reap and Preah Sihanouk.

Migration Across Cambodian Telco Operators

Majority of churners¹ are seen to migrate to *Smart* in May 2020.

The following chart illustrates the proportion of telco subscribers who have migrated to a different telco operator in May 2020 (e.g. 70% of *Metfone* churners migrated to *Smart* in May 2020).

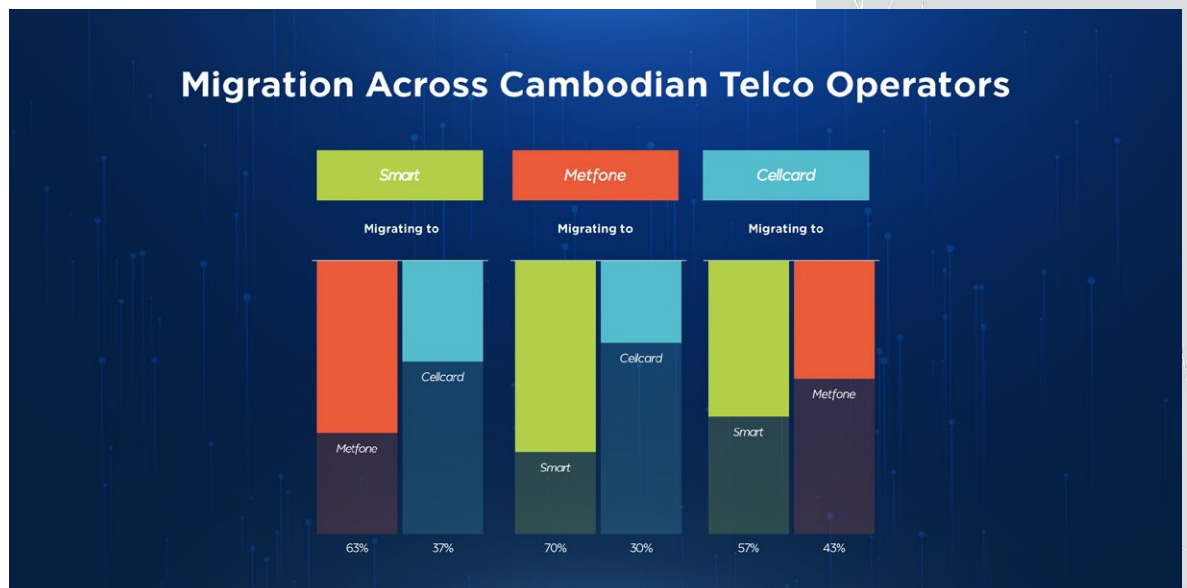


Fig 4. Migration Across Cambodian Telco Operators

Smart lost a fraction of its customers to *Metfone* however, gained most customers from them.

30% of *Metfone* customers were observed to have moved to *Cellcard*, conversely, *Metfone* experienced a substantial amount of gains from *Cellcard* at 43%.

Cellcard had most of its new customers who migrated from *Smart*, but at the same time, had most of its existing customers churn out to *Smart* in comparison to *Metfone*.

NOTE

1 A measure of the number of individuals or items moving out (leaving) of a collective group (e.g. telco provider) over a specific period.

Most Popular Multi-SIM Combinations

The most popular multi-SIM combination in Cambodia is *Smart - Metfone*.

Smart - Metfone holds the largest share out of the nation's four most common multi-SIM combinations, with *Cellcard - Smart* in close second.

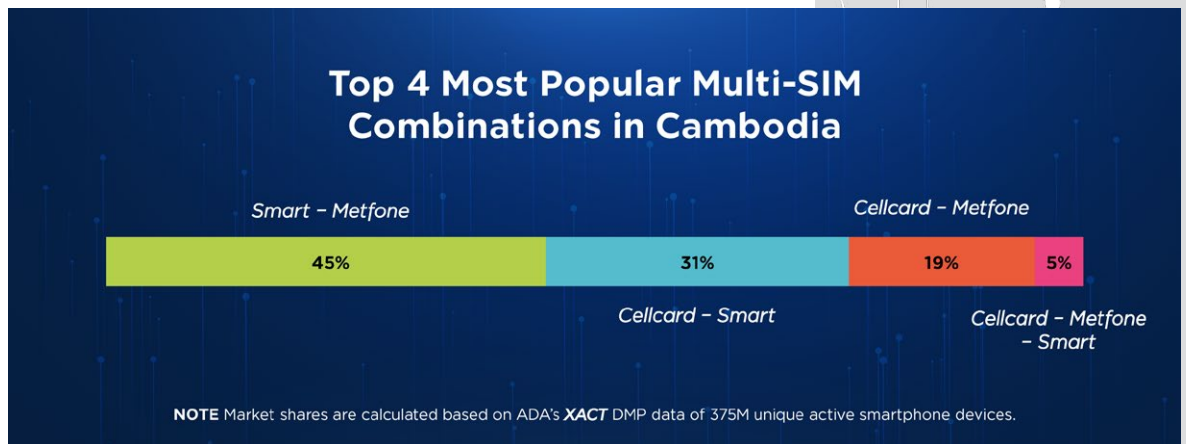


Fig 5. Most Popular Multi-SIM Combinations

The *Smart - Metfone* combination is the clear preference in the Top 5 Cambodia Provinces with the most identified multi-SIM users.

This is followed by *Cellcard - Smart* and *Cellcard - Metfone* combinations in second and third place. The least combination noted were *Cellcard - Metfone - Smart* which were mostly which were mostly contributed by Takeo and Banteay Meanchey province.

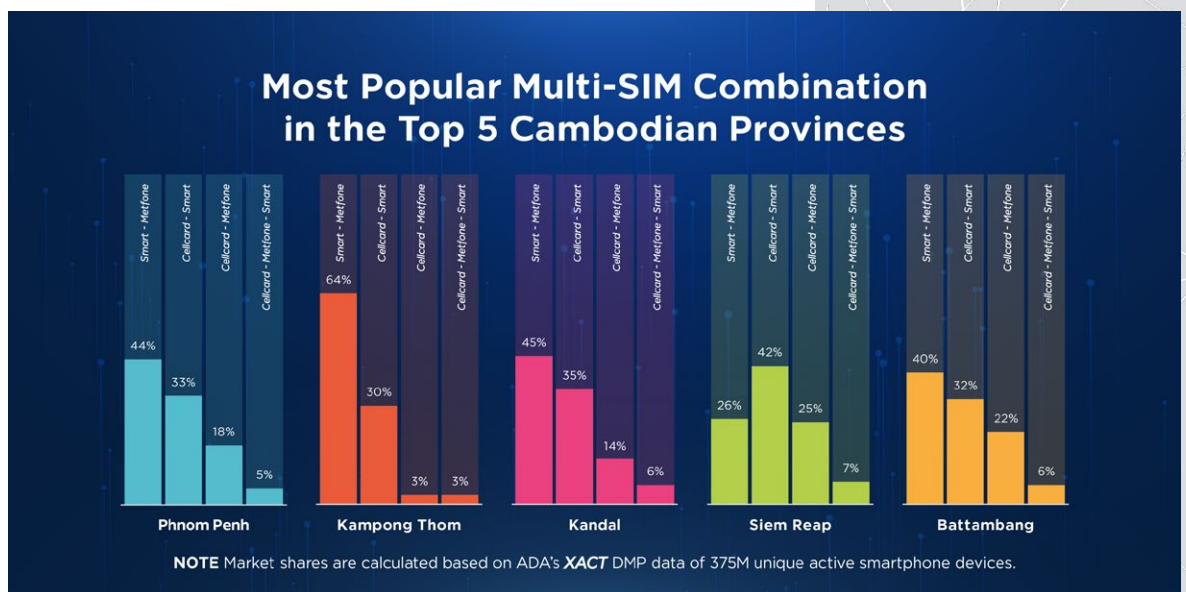


Fig 6. Most Popular Multi-SIM Combination in the Top 5 Cambodian Provinces

Top Five Personas in Cambodia

What are Personas?

ADA utilises our **XACT** Platform to look at users' interests and categorise them into personas based on the app categories most present in their mobile devices.

The following top five personas make up 90% of the total smartphone device segmentation in Cambodia.



Gamers are users who have a variety of games on their devices and focus on them intensely.

Cellcard users fall behind *Smart* and *Metfone* in this persona group.

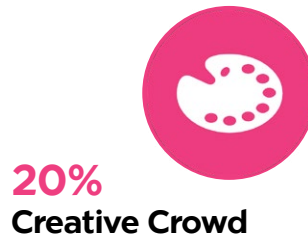


Photo and video editing apps are the focus of these users lives.

Smart users lead this persona in the Cambodian telco market.



Movie watchers and music lovers focus on streaming apps for leisure.

Similar to other personas, *Metfone* users come in close second behind *Smart's* Creative Crowd.



These users focus on their devices, where they personalise and optimise their individual experiences.

Majority of the users sprouting in this persona are *Smart* users.



Usage of health management apps indicate they like to stay on top of their health and improve their lives.

Cellcard users are in high competition with *Metfone* users in this persona category.



Summary of Findings for May 2020

Moving forward in the Cambodian telco market:



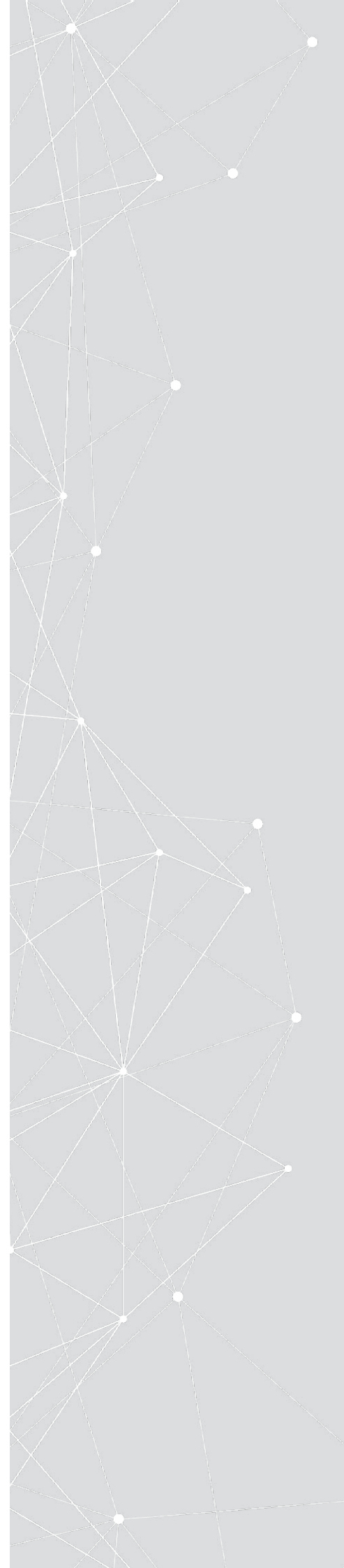
Smart has higher chances to gain market share in Siem Reap, Kandal and Kampong Cham. *Smart* could capture the minuscule marginal difference of Gamers with *Metfone* in these provinces with specific mobile packages offerings and digital advertisements.



Metfone being the second preferred telco in Cambodia, leads significantly in Kampong Theam, and neck-at-neck in Kandal with *Smart*. *Metfone* could gain market share in this area by appealing to Creative Crowds here with attractive offerings and deals with devices emphasising on the camera and visual editing features.



Cellcard faces high competition from *Smart* and *Metfone*, though managed to be at par with *Smart* in Siem Reap province. *Cellcard* falls behind both its competitors in all personas, however, having an insignificant difference with *Metfone* in the Health Junkie persona. *Cellcard* may increase its percentage of market share in this province by appealing to health enthusiasts with tie up deals for gym memberships or fitness gadgets.



ADA is here to help your business make better data-driven decisions today. Speak to us to find out more.



Mainak Mukherjee

*Head of Telco & Electronics
- Business Insights*

Analytics leader with extensive experience in ASEAN consulting firms and Telco, specialising in data monetisation.

Aspires to help companies unlock the full potential of data.



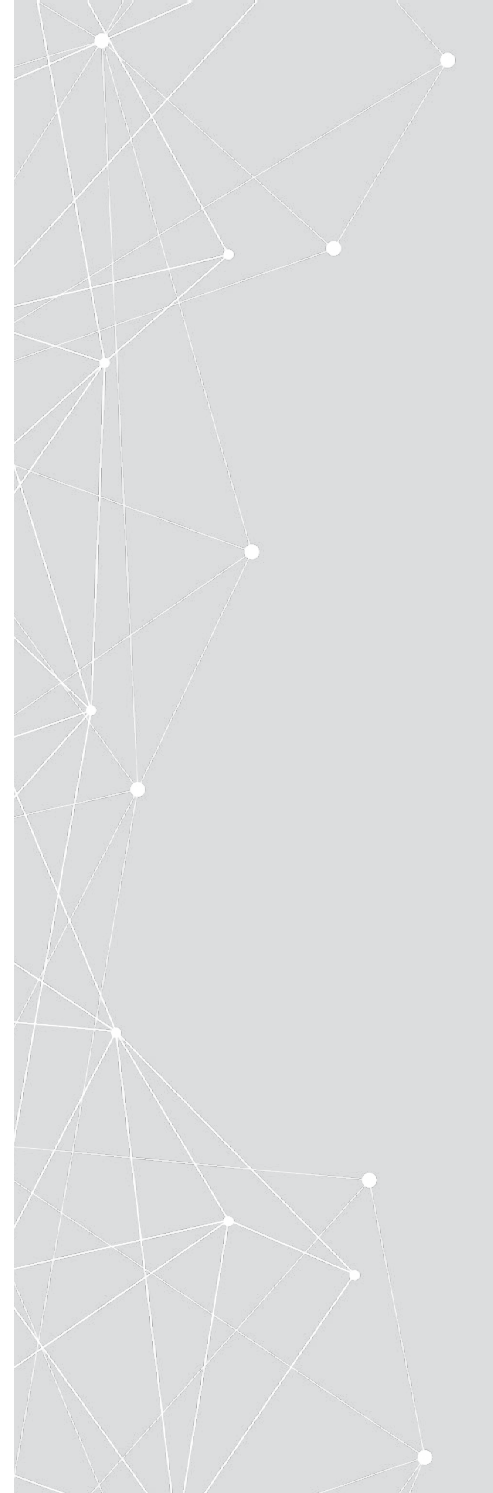
Hubert Marchand

*Country Director,
Cambodia*

As the Country Director of ADA in Cambodia, he has led the local office since its establishment in 2018.

Hubert has experience in the world of digital media and data-driven marketing.

He aims to help businesses achieve their data and digital marketing maturity.



CONTACT US

ada-asia.com/contact-us/



© 2020 ADA. All rights reserved.

"ADA" refers to Axiata Digital Advertising Sdn Bhd and all related corporations and subsidiaries. The information contained in this publication is for general guidance on matters of interest only. ADA is not responsible for any errors or omissions, or for the results obtained from the use of this information. Certain links in this publication connect to other websites maintained by third parties over whom ADA has no control. ADA makes no representations as to the accuracy or any other aspect of information contained in other websites.

To read more on our privacy terms, or to contact us, please visit www.ada-asia.com

ada
analytics · data · advertising