The Internet Society Survey on Policy Issues in Asia-Pacific 2015

Final Report

JULY 2015

Internet Society

Introduction

An initiative of the Asia-Pacific (APAC) Regional Bureau, the Internet Society Survey on Policy Issues in Asia-Pacific is an annual, cross-sectional study of the attitudes of Internet stakeholders toward topical Internet policy concerns in the region. Now in its second installment, this year's study aims to take an in-depth look at ongoing Internet policymaking trends, and to gain further insights on the most important policy themes and areas of concern as identified by Internet users in the 2014 survey.

This report provides an overview of the survey's findings, which we believe will contribute to informed policy debates and discussions - both in the region and globally.
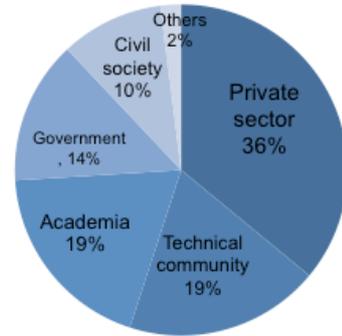
HIGHLIGHTS

❖ **Connectivity is the topmost concern for end-users in Asia-Pacific**

❖ **Over-the-top services (OTT) has become a priority issue for respondents**

❖ **87% want more opportunities to participate in Internet policymaking**

❖ **95% believe that online privacy protection should be guaranteed by national law**

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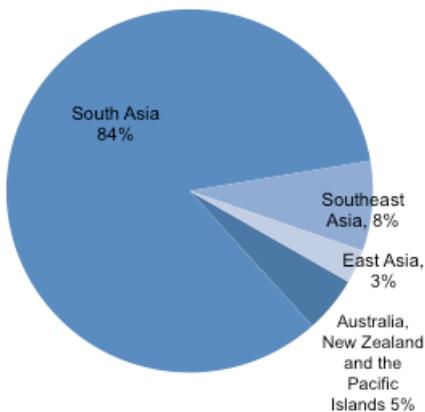
Background and methodology

The survey was conducted online using the Survey Monkey platform, and ran from January 12 to February 12, 2015. Links to the questionnaire were disseminated via email to and through the 20 Internet Society Chapters, as well as to individual members, in the Asia-Pacific region. It was made open to non-members of the Internet Society to gain as wide input as possible, and was promoted via various online channels, including social media.

The poll was administered in English and divided into four sections. The first set of questions helped to determine the demographic of the sample population, while the second gauged respondents' perceptions of Internet policymaking in their respective countries. The third and fourth sections solicited views on two areas of concern which were identified as priority issues by respondents in last year's survey: policies on Internet access and connectivity, and cybersecurity.

Survey participants by sector

Survey participants by sub-region

The survey garnered responses from 3,302 participants, and had a 92.4% completion rate. It differs from last year's Regional Policy Survey in that it was aimed at the broader Internet community — rather than solely ISOC chapters and members—in Asia-Pacific. Some 40% of respondents in this year's survey were non-ISOC members, while 87% stated that it was their first time to answer an ISOC Regional Policy Survey.

Respondents belong to a young demographic: 68% were between 15-34 years old, with 21% aged 35-44, and only 10% being 45 years old or older. Thirty-six percent were affiliated with the private sector, 19% with the technical community, another 19% with academ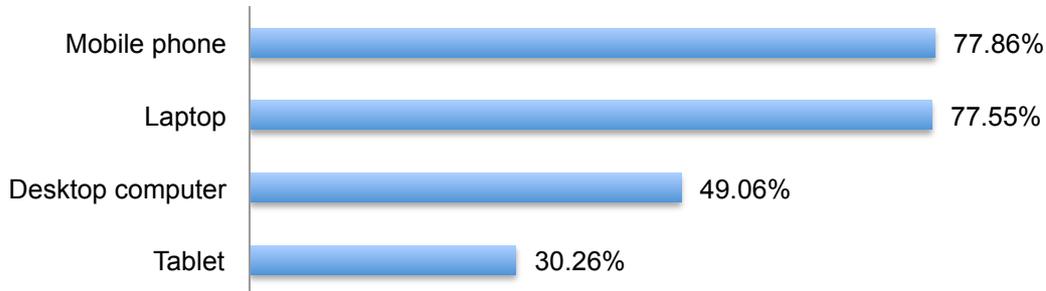ia, 14% with government and 10% with civil society. The remaining 2% consisted mainly of students, media practitioners and those from intergovernmental groups, as well as those who have multiple roles across different fields.

More than two-thirds of respondents self-identified as residing in or originating from South Asia (84%), with only a minority coming from Southeast Asia (8%), East Asia (3%), and Australia, New Zealand and the Pacific Islands (5%). In addition, an overwhelming majority of the total respondents are male (91%).

The shift to mobile devices is reflected in the survey's findings: 78% of respondents use their mobile phones more frequently to access the Internet. An equal number use laptops, 30% use tablets, and less than half (49%) said that they use desktop computers to go online. Despite these emerging trends, most of the respondents continue to access the Internet at home (90%) and in the workplace (74%), with 44% accessing

it on the go. It is notable that respondents aged 45 and above access the Internet more on their laptop than on their mobile phone.

Devices used to access the Internet

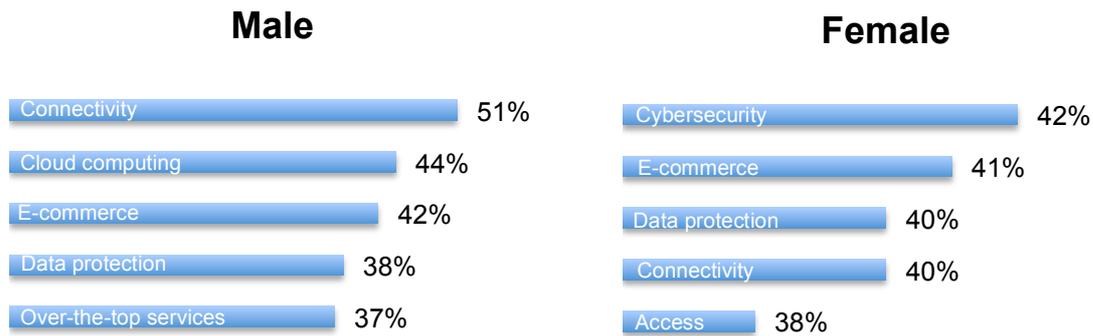| Device	Percentage
Mobile phone	77.86%
Laptop	77.55%
Desktop computer	49.06%
Tablet	30.26%

Key Findings

Major areas of concern

In the past year, half or close to half of the respondents were following issues related to connectivity (50%), cloud computing (43%) and e-commerce (42%), while more than a third were following developments around data protection (38%), Internet access (37%), cybersecurity (36%), over-the-top services (36%), the Internet of Things (36%) and privacy (35%).

The 5 most monitored Internet policy issues

Issue	Percentage
Connectivity	49.92%
Cloud computing	42.84%
E-commerce	42.12%
Data protection	38.34%
Access	36.86%

These figures present divergences from the results of the 2014 Asia-Pacific Regional Policy Survey. Notably, cybersecurity, which was among the top five most relevant policy areas last year, has slid down a few notches. However cybersecurity remains the third most monitored issue among ISOC members, and was also the topmost concern for females, followed by e-commerce, data protection, connectivity and access.

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Top 5 concerns for respondents, by gender

Male

Connectivity	51%
Cloud computing	44%
E-commerce	42%
Data protection	38%
Over-the-top services	37%

Female

Cybersecurity	42%
E-commerce	41%
Data protection	40%
Connectivity	40%
Access	38%

Access was the primary concern for those aged 45-59, and the second for respondents from government, and those 60 years old or older. Over-the-top services (OTT) has risen to the 10 top ranking issues for respondents – it was at the bottom in last year's survey. Specifically, it was the 2nd most monitored issue by the 25-34 age group. E-commerce and access likewise inched up to the top five concerns tracked by stakeholders.

Somewhat expectedly, freedom of expression was the second biggest concern for respondents from civil society; cloud computing was first on the radar of those from the technical community; while the Internet of Things was the third most topical concern for those affiliated with academia and research institutions. Similar to last year's findings, the least monitored topics continue to be cross-border and multilateral treaties on cyberspace, and Internet fragmentation.
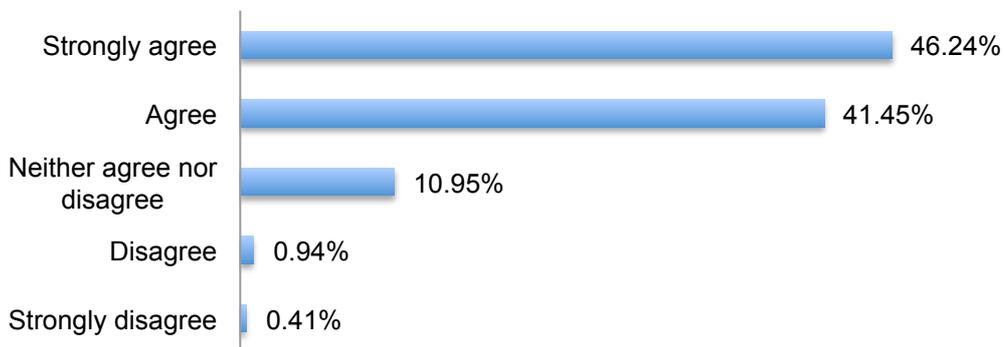
Other Internet policy areas monitored by respondents

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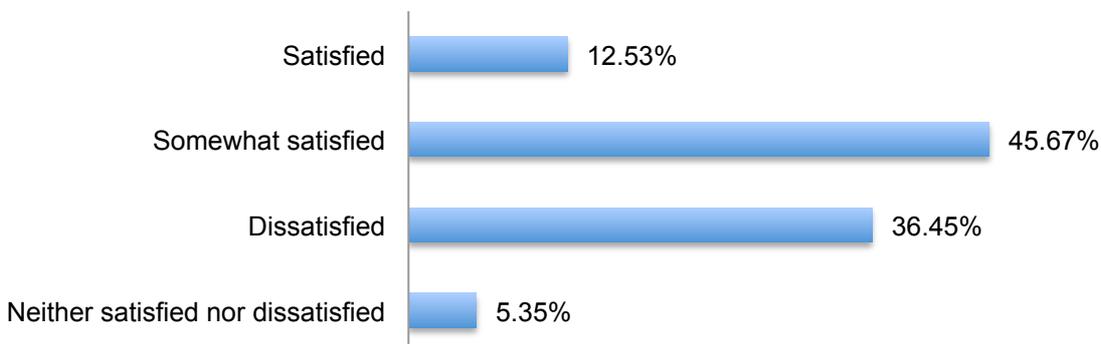
Participation in Internet Policymaking

A high proportion of respondents (87%) care about Internet affairs in their own country, but many also felt that they were not adequately equipped with the tools to participate in state-led policymaking for the Internet. Some 37% indicated that they have poor or very poor comprehension of how Internet policies are developed in their country, while only 28% rated themselves as having good or very good understanding of these processes. Indeed, the majority of survey participants (87%) would like their government to provide more opportunities for them to be involved in Internet policymaking.

The government should provide more opportunities for participation in Internet policymaking processes

Strongly agree	46.24%
Agree	41.45%
Neither agree nor disagree	10.95%
Disagree	0.94%
Strongly disagree	0.41%

When asked to rate their government's receptiveness to input from the broader community, less than a third of respondents believed it was very good (4%) or good (21%). More than a third (37%) thought it was satisfactory, while the other third thought it was either poor (30%) or very poor (7%). These sentiments tie in with respondents' views on governments' awareness of Internet affairs: An overwhelming majority strongly agree (56%) or agree (34%) that policymakers in their country need a better understanding of Internet issues.

Respondents' satisfaction with their government's policies regarding the Internet

Satisfied	12.53%
Somewhat satisfied	45.67%
Dissatisfied	36.45%
Neither satisfied nor dissatisfied	5.35%

It is important to take note of this response as only 13% were satisfied with their government's policies regarding the Internet, with the majority indicating that they were dissatisfied (36%) or only somewhat satisfied (46%).

Policies on Internet Access and Connectivity

The bulk of respondents felt that existing government policies do not fully address local challenges in Internet connectivity: Some 62% indicated that these are only being partially addressed, while 23% thought that these are not being addressed at all.

To this end, survey participants believed that governments should fully (55%) or at least partially (39%) invest in developing Internet infrastructure and networks. These can range from direct rollouts to encouraging fair market competition for operators and service providers, for instance through provisions that facilitate the sharing of infrastructure among ISPs.
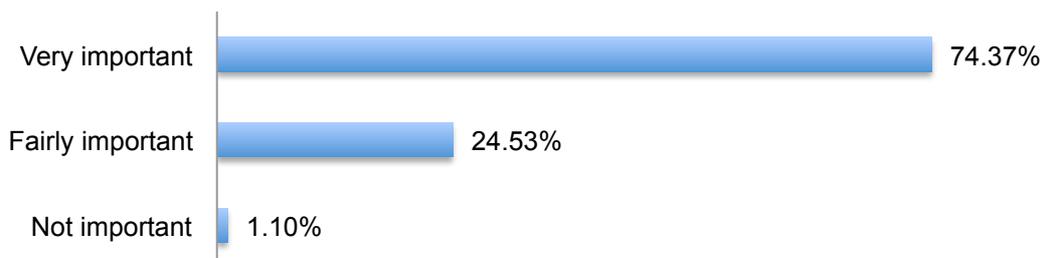
Respondents' view on the extent to which governments should invest in infrastructure

Fully — 54.92%
To some extent — 38.51%
Not at all — 4.40%
Not sure/undecided — 2.17%

Notably, 99% of respondents thought that universal broadband access policies are important in expanding Internet connectivity to under-served populations, with 74% stating that this was very important.

Government intervention was viewed as integral to improving overall connectivity. Specifically, 86% of respondents felt its involvement is needed to increase Internet access in rural areas. The majority also believed that it is essential to improving Internet speeds (80%), making the Internet more affordable (76%) and their Internet connections more reliable (69%). The state was equally perceived to have an integral role in improving supporting infrastructure such as power supply for continuous connectivity (68%), as well as the availability of low-cost Internet-capable devices (67%)—including assistive tools for people with disabilities-- and of local and locally relevant content (48%).

Importance of universal broadband access policies for expanding connectivity to under-served populations, as rated by respondents

Very important — 74.37%
Fairly important — 24.53%
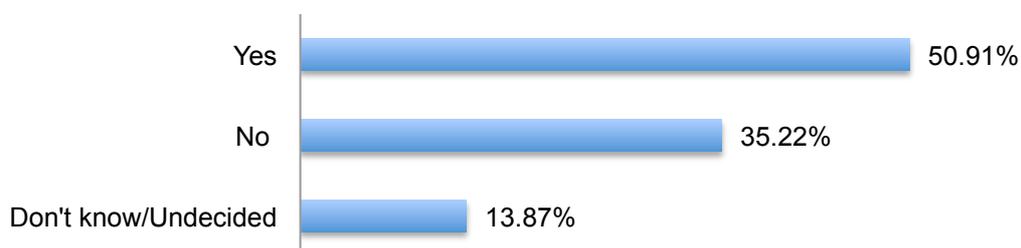Not important — 1.10%

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Beyond enabling access, survey participants felt that government involvement is needed in creating a favorable environment that will foster meaningful Internet use especially among those who are coming online for the first time. Among the measures cited by respondents in the survey's open comments section was raising awareness of the Internet's value, with some calling for state subsidies in developing digital literacy, especially among rural populations.

Governments, respondents added, can more actively progress towards making public services available online, guaranteeing freedom for citizens to access such information while at the same time minimising filtering, censorship and other measures that may degrade users' trust in the Internet and impinge on their digital rights. By extension, the state is seen as crucial in establishing standards for quality of service, to ensure the availability of sufficient bandwidth to carry the content and applications that users want and need.

Policies on Cybersecurity

Amidst the security-related concerns that have arisen in the region in recent years, slightly more than half of respondents (51%) continue to believe that the Internet is a trusted medium. More than a third, however, felt otherwise, while the remaining 14% are undecided.
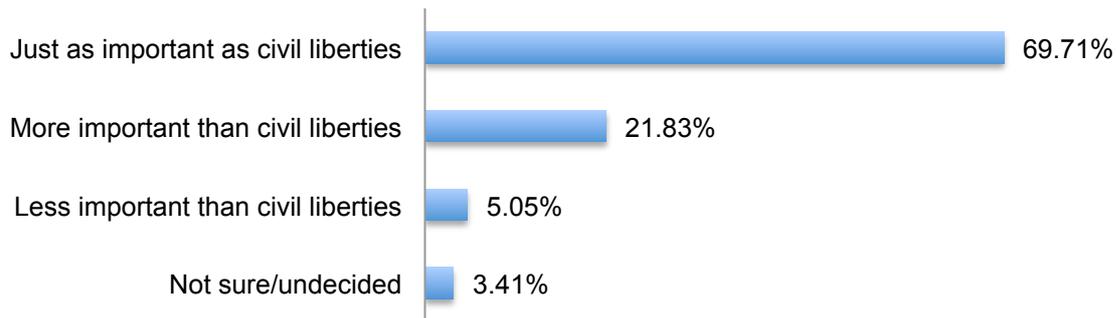
Respondents' perception on whether the Internet is a trusted medium

Category	Percentage
Yes	50.91%
No	35.22%
Don't know/Undecided	13.87%

As in Internet connectivity, national governments were seen to have a vital role in online security affairs, but there is no broad consensus on which stakeholder should take charge. Forty-five percent felt that national governments should have oversight on cybersecurity. A quarter (25%) believed that the area should be supervised by a multi-stakeholder group, and a minority thought that it should be governed by a treaty or global agreement (14%) or an international law enforcement agency (13%).

Respondents, however, commented that while the government should lead on state-related security issues in cyberspace, international cooperation and collaboration are needed for many of the concerns in the field. They cautioned against centralising the management of online security, stressing that users of all kinds should have a degree of control over the aspects of security which affect them. Similarly, other respondents felt that cybersecurity concerns should be handled by different stakeholders on a case-to-case basis, and governed in accordance with globally accepted norms.

For respondents, cybersecurity is:

It is important to note that 70% of survey participants felt that cybersecurity and civil liberties are equally important, with only 21% believing that the former is more important than the latter. While ninety-five percent felt that government policies for cybersecurity are necessary, an equal number believed that online privacy protection should likewise be guaranteed by national law.

Conclusion

The results of this year's Regional Policy Survey show that connectivity continues to be the most important concern for Internet stakeholders in the region. As the world moves towards a future of increasing machine-to-machine connectivity and the Internet becomes even more embedded in everyday life, issues such as data protection, e-commerce, over-the-top services and cloud computing inevitably rank higher on users' radar.

While understanding and awareness of Internet policy development have yet to reach an optimum level, Internet stakeholders in the region are unquestionably interested in more avenues opening up for them to participate in these processes, especially as they remain somewhat dissatisfied with the outcomes of existing policy-making approaches.

Respondents recognised the decisive role that government can play in online security issues, and also highlighted that involvement of - and collaboration between - various stakeholders in such matters was crucial. Significantly, survey participants held the view that cybersecurity does not necessarily take precedence over other (potentially conflicting) concerns such as the protection of civil liberties online.

An important role is seen for government in expanding Internet connectivity. Respondents felt that more state involvement is needed in matters such as infrastructure and network deployment, as well as capacity-building particularly in rural areas; improving the affordability of both the Internet and the devices used to access it; and nurturing an ecosystem that fosters an open and innovative Internet that is relevant to all users.

Please send all comments and feedback to:

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