# The Internet Society Survey on Policy Issues in Asia-Pacific 2016

Final Report

AUGUST 2016

# 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 third installment, this year's study aims to take an in-depth look at multi-stakeholder participation in Internet policymaking, and to gain further insights on two important areas of concern in the region: Internet access and online security.

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

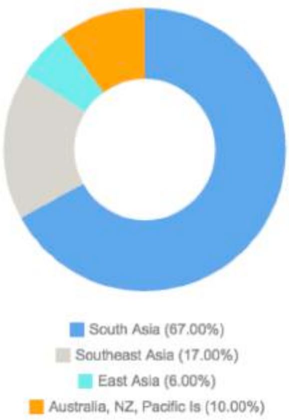
- Access was the most monitored Internet policy concern in the past year
- Cybersecurity was the top issue that stakeholders felt needed attention from policymakers
- 77% of respondents did not have an opportunity to participate in policymaking for the Internet in the past year
- 59% felt their privacy is not sufficiently protected when they use the Internet
- Only 9% thought that government policies on Internet security fully reflected their own online concerns
- 66% believed that government policies on Internet security are not fully appropriate to the real risks encountered online

## Background and methodology

The survey was conducted online using the Survey Monkey platform, and ran from 25 March to 25 April 2016. 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 opened to non-members of the Internet Society to gain as wide input as possible, and was promoted via various online channels, including social media.

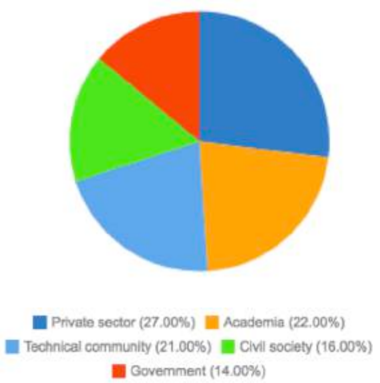
The poll was administered in English and divided into four sections. The first set of questions helped to determine the demographic of the sample population, while the second gauged respondents' level of participation in Internet policymaking in their respective countries. The third and fourth sections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

**Survey participants by sub-region**




The survey garnered responses from 1,770 individual stakeholders. The majority of participants (89%) were ISOC members, with 75% of the total number of respondents stating that it was their first time to answer an ISOC Regional Policy Survey.

**Respondents by stakeholder group**




Respondents were scattered across all age groups, but lean towards a younger demographic: some 52% were between 15-34 years old, 28% were aged 35-44, and the remaining 20% were 45 years or older. Twenty-seven percent were affiliated with the private sector, 22% with academia, 21% with the technical community, 16% with civil society and 14% with government.

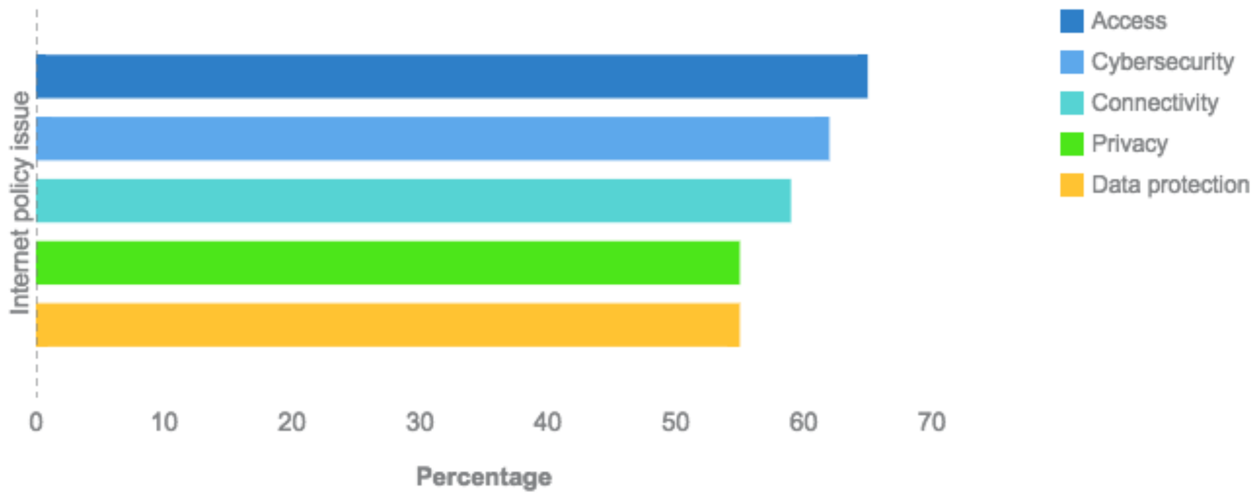
More than half of the survey participants self-identified as residing in or originating from South Asia (67%), with the rest coming from Southeast Asia (17%); East Asia (6%); and Australia, New Zealand and the Pacific Islands (10%). Some 86% of the total number of respondents were male.

## Key Findings

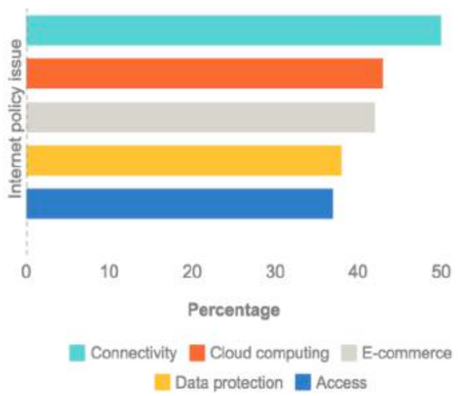
### Major areas of concern

In the past year, more than half of respondents followed news around Internet access (65%), cybersecurity (62%), connectivity (55%), privacy (55%), data protection (55%) and cybercrime (52%). This presents a slight shift from the results of the 2015 Asia-Pacific Regional Policy Survey, with cybersecurity and privacy replacing e-commerce and cloud computing in the top five most monitored policy areas.

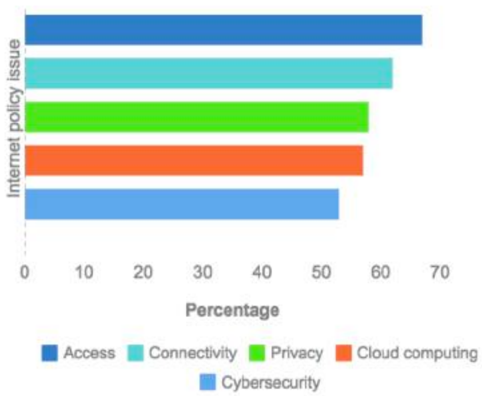
**The 5 most monitored Internet policy issues**




2015




2014




To a lesser degree, Internet users were also following developments around cloud computing (46%), e-commerce (44%), big data (44%), consumer protection (43%), the Internet of Things (43%), freedom of expression (40%), online child protection (38%), content filtering (37%), censorship (36%), and net neutrality (34%).

Internet access was of greater importance to specific sectors and sub-regions, particularly rural dwellers (69%); those living in the Pacific islands, Australia and New Zealand (77%);

as well as for those 45 years old or older (74%). Connectivity was also a bigger concern for these segments, at times overtaking cybersecurity as their second priority area in policymaking.[1]

Cybersecurity was the foremost monitored topic among those between 15 to 34 years old[2] but was a lesser priority for respondents above 60 years old. It was also topmost among those who were affiliated with the government sector and the technical community. Civil society was much more concerned with freedom of expression (55%), net neutrality (47%) and censorship (50%). Areas related to online content control were likewise high in the Pacific, where half or close to half of respondents kept an eye on filtering (50%), freedom of expression (49%) and net neutrality (44%) issues. Government surveillance, meanwhile, was tracked by 42% of those 45 years old or above.

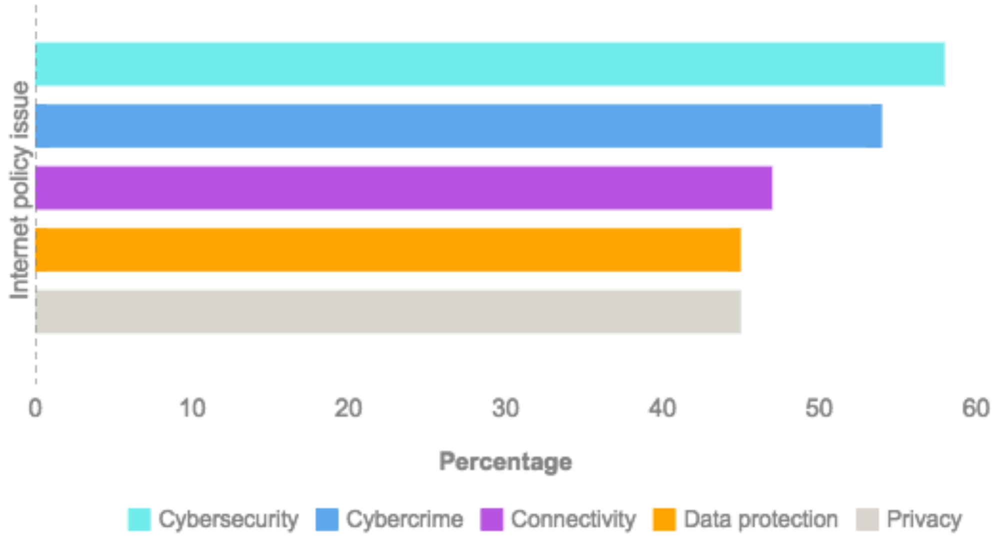
In general, those who spent more than one-third of their income[3] on Internet access monitored a wider range of issues. Consumer protection was of greater importance than average (51%), and more than a third were following developments around transparency of service provision (47%), local content development (44%), digital economy (44%), encryption (42%), online behaviour and codes of conduct (42%), e-entrepreneurship (40%), intellectual property rights (37%), and technical protocols and standards (35%).

Privacy was monitored to a higher degree (64%) by those between 15 to 24 years old[4]-- over a third (35%) of respondents in this demographic were also following developments around over-the-top services.

Broadly, these findings suggest that the top priority issues—access, connectivity and data protection with one or two exceptions, have remained the same for stakeholders in Asia-Pacific in the past three years.

[1] Some 66% of rural dwellers, and 79% of those 45 years old or above were monitoring Internet connectivity,
[2] It should be emphasised that 78% of the respondents between 15-34 years old were Internet Society members, and may thus have greater awareness of security issues than the general public.
[3] The survey did not include questions that sought to quantify respondents' income or the cost of Internet access in their country—all references to both are thus based only on the self-reports and estimates of survey participants.
[4] It should be stressed that 76% of the respondents between 15-24 years old were Internet Society members, and may thus have greater awareness of privacy issues than the general public.

**The top 5 issues that require attention from policymakers in Asia-Pacific**




When it came to areas that warranted urgent attention from policymakers in their country, respondents put online security as their chief priority. Specifically, 58% felt that cybersecurity and 54% thought that cybercrime were the top two issues that deserved to be addressed by government. These were followed by connectivity (47%), data protection (45%), privacy (44%), consumer protection (35%) and online child protection (34%).

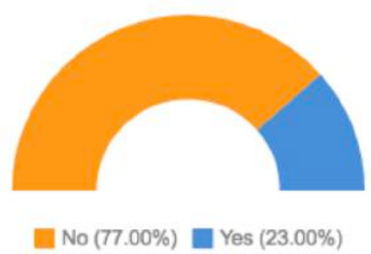
Connectivity however ranked as a higher priority for rural dwellers (56%), and civil society (54%), while access was topmost among those 60 years old and above (59%).

## Participation in Internet Policymaking

Last year's Asia-Pacific Internet Policy Survey found that a high proportion of respondents (87%) cared about Internet affairs in their own country, and would like their government to provide more opportunities for them to be involved in Internet policymaking.

Those findings were given more substance by this year's survey, with 77% of respondents saying that they have not had an opportunity to participate in public consultations for government policymaking for the Internet in the past year. This figure was higher for those between 15 to 24 years old (85%) and those in the private sector (84%). Conversely, the proportion of those who have had the opportunity to participate was higher for those who identified with civil society (34%) and those who live in Southeast Asia (33%).

**Respondents on being given an opportunity to participate in policymaking**

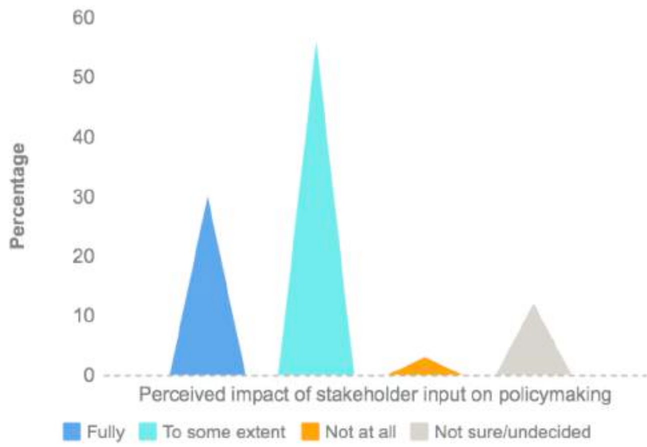



The minority (23%) who have had a chance to contribute to policymaking learned of these opportunities mainly through email (63%). Other means included personal invitations (46%), social media posts (40%), government websites (26%), media or press coverage (24%), word of mouth (19%), government press releases and advertisements (15%).

Ads were a bigger source of information for 15 to 24 year olds (40%), as well as rural dwellers (29%), but it was much less useful for female respondents (2%).  Email was an even more effective tool, having reached both rural residents (76%), and those who spend more than one third of their income on Internet connectivity (93%) more pervasively.

That 89% of those who received a call for input provided a response shows the importance of opening up more opportunities for participation.

**Respondents on the extent to which their input was reflected in policy output**




Of these, over half  (55%) provided input as an individual, with the remaining 45% contributing as part of a group or organisation.  Personal inputs were higher for private sector (64%) and those between 15 to 34 years old (62%). Meanwhile, respondents providing comment as part of a group were slightly more prevalent among civil society members (51%), female respondents (56%) and those 45 years old or above (54%).

Most respondents who have participated in policymaking felt positive about the impact of their contribution: the vast majority believed that it was reflected either fully (30%) or to some extent (56%) in the output of the consultation: only 3% believed that it was not reflected at all, while 12% were undecided.

The 11% who had the opportunity but didn't provide feedback declined for a number of reasons: 33% said they did not have time; 21% felt they didn't have the resources to do so; that others have already provided similar inputs (10%); or their response would not be considered important (10%). Only 8% said it was not relevant to them, or felt that their response would not make any impact.

If given the opportunity to participate in and contribute to consultations for government policymaking for the Internet, the majority of respondents indicated that surveys (70%), focus group discussions (61%), face-to-face meetings or dialogues (55%) would be of most interest to them, while a smaller proportion also preferred written submissions (37%). However, those who have had the chance to participate in policymaking preferred focus group discussions (67%) and face-to-face meetings (65%) over other methods.

When asked for other avenues of interest, respondents mentioned agenda-based conferences; public hearing; workshops that can at the same time enhance participants' knowledge of policymaking and policy issues; and online channels such as webinars and collaborative platforms that would allow stakeholders to form virtual working groups and make submissions through the Internet.

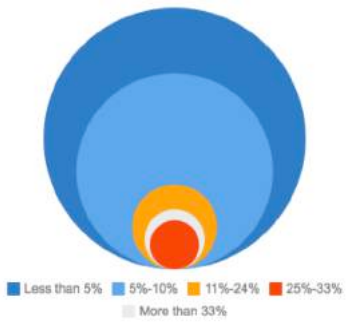
## Trends in Internet Access

Respondents accessed the Internet through various means: More than a quarter went online mainly through wireless or cellular (41%),[5] or through DSL (26%) networks. The rest were using optical fibre (19%), cable (12%) or dial-up (2%).

Those who spend more than one-third of their income on Internet connectivity used cellular (28%) more than any other means. By contrast only 6% of senior citizen respondents used cellular connectivity. Women, meanwhile, mainly used wireless Internet (43%).

Some 73% of respondents also use the Internet for business purposes, the bulk (68%) of whom are between 25 to 44 years old. Business use was drastically lower among those who spend more than one-third of their income on Internet connectivity (51%), and among rural dwellers (54%).

**Internet cost as a % of monthly income**

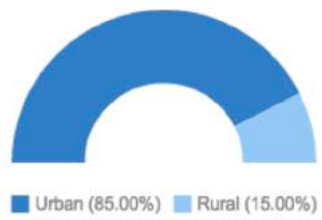



Some 57% of respondents stated that they spent less than 5% of their monthly income to connect to the Internet each month. This figure was higher (67%) for those in East Asia, and lower (42%) for Internet users between 15 to 24 years old.

Thirty-two percent spent between 5% to 10%, another 8% spent more than 10% but less than 33% of their income for Internet access per month. Only 3% of respondents spent more than a third of their monthly income to go online.

It must be noted that the majority of survey respondents (85%) reside in urban areas[6]--the remaining 15% are rural residents, 54% of whom spend more than 5% of their income for Internet each month.

**Respondents' area of residence**




Over half of respondents have observed improvements in their connectivity over the past year, with 70% stating that they had experienced better Internet speed. Sixty-one percent had better choice of packages offered by their Internet service provider, 58% had a more reliable Internet connection, while 55% had noticed a drop in the cost of their Internet subscription, as well as an uptick in the quality of their Internet service.

Respondents in South Asia had higher than average (by 6% to 9%) improvement across all these factors—by contrast, those in Southeast Asia, who had lower than average (by 8% to 15%) gains in their Internet service.

As for the speed of their fastest Internet connection, 17% of respondents had less than 1 Mbps; 27% had 2 to 3 Mbps, 27% had 4 to 10 Mbps; 9% had 11 to 20 Mbps; and 16% had

[5] Wireless (27%) and cellular (14%) connections were separate categories in the survey, but was combined in the report, taking into account the overlap between the two types of network

[6] This proportion is higher among respondents from East Asia, 96% of whom stated that they live in cities

more than 20 Mbps.[7] Not surprisingly, those who spend more than one-third of their income on Internet access, as well as rural dwellers were also more likely to have lower Internet speeds, with over a quarter (26% and 28% respectively) of respondents having a less than 1 Mbps connection.

**Respondents' fastest connection speed**

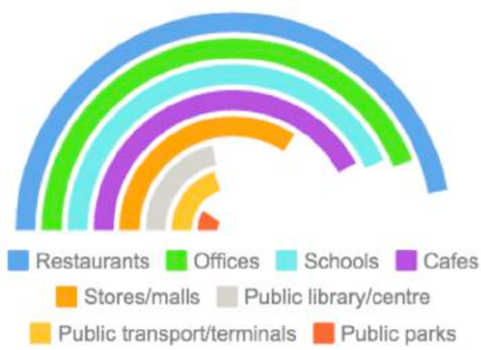

East Asia stands out as the sub-region where the majority (60%) of respondents have a higher than 20 Mbps subscription, with only 3% having less than 1 Mbps.

There are three methods of access available to the majority of respondents on a daily basis: residential connection (77%), mobile data (76%) and office Internet (71%). Less than a quarter could access the Internet daily from other sources such as free Wi-Fi provided by a private enterprise (19%), free public Wi-Fi (18%), Internet café (17%), school (15%), a paid Wi-Fi hotspot (14%) or a public library or community centre (8%).

Those who spend more than one third of their income on Internet connectivity had mobile data as the primary mode of access available to them daily (74%) with residential connection (67%) and office Internet (49%) trailing behind. A similar pattern is observed among rural residents.[8] Perhaps not surprisingly, mobile data is also the leading source of everyday access for respondents between 15 to 24 years old (78%).

The availability of free public Wi-Fi (33%), Internet in schools (29%) and free Wi-Fi provided by private enterprise (33%) was higher than average for East Asian residents, as well as for those in Southeast Asia, albeit to a lesser degree.[9]

**Places with free Wi-Fi**




Meanwhile, those 60 years old or above relied more on residential connection (96%) and less on mobile data (51%) and Internet cafes (10%) for everyday connectivity.

Internet users in Asia-Pacific had a number of places that offered free Wi-Fi access in their city, town or village, but no single option was available for the majority of respondents. At the top of the list were restaurants (47%), followed by offices (44%), schools including colleges and universities (43%), cafes (42%) and shopping malls (34%). Free Internet through public libraries or community centres (21%), public transport and terminals (20%), residential buildings (15%) and public parks (9%)

[7] The remaining 5% did not know the speed of their Internet connection.
[8] The top three modes of access for rural residents are mobile data (71%), residential connection (65%) and office Internet (56%)
[9] Some 30% of respondents from Southeast Asia had free public Wi-Fi, and 29% had access to free Wi-Fi provided by a private enterprise

were accessible only to a small minority. The remaining 6% did not have any free Wi-Fi available to them in their locality—a figure that doubled (12%) for rural area dwellers.

There was a higher overall availability of places with free Wi-Fi in East Asia: More than half of respondents had cafes (65%), restaurants (60%) and offices (53%), while a substantial number could also access the Internet for free in libraries (48%), transport and terminals (33%), and public parks (6%).

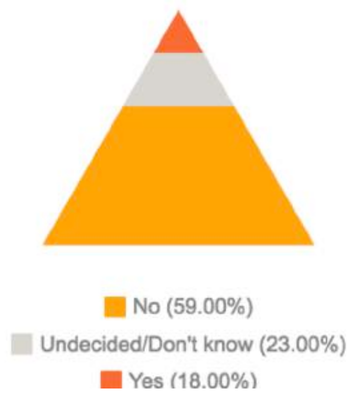
There was a lower overall availability of private establishments with free Wi-Fi in rural areas.[10] Southeast Asia, on the other hand, had a higher than average concentration of free Wi-Fi in cafes (67%), restaurants (57%), and shopping malls (54%).

## Policies on Online Security

The elements of trust online are multi-faceted, and are reflected in the survey's findings. A large proportion of respondents cited reliable access (82%) and data protection (77%) as crucial for building confidence in the Internet. More than half also ticked consumer protection (54%), transparency (51%), and the ability to communicate confidentially (51%), while more than a third marked choice of content, service, technology and applications (45%), data portability[11] (40%); and accessibility, including for persons with disabilities (34%). Notably, the ability to communicate confidentially was a higher priority for respondents in Southeast Asia (68%) as well as for those aged 45 or above (62%).

Privacy, however, was another matter: More than half of respondents (59%) did not feel that their privacy is sufficiently protected when they use the Internet, while just under a quarter (23%) were unsure.

**Respondents on whether their privacy is protected online**




A substantial number (62%) of survey participants were aware of a proposed or existing government policy around Internet or online security in their country. Significantly, a similar proportion believed that government policies or positions on Internet security fully (9%) or to some extent (53%) reflect their own online concerns. Almost a quarter (23%) indicated that it did not reflect their own sentiments at all, while the rest were undecided (17%).

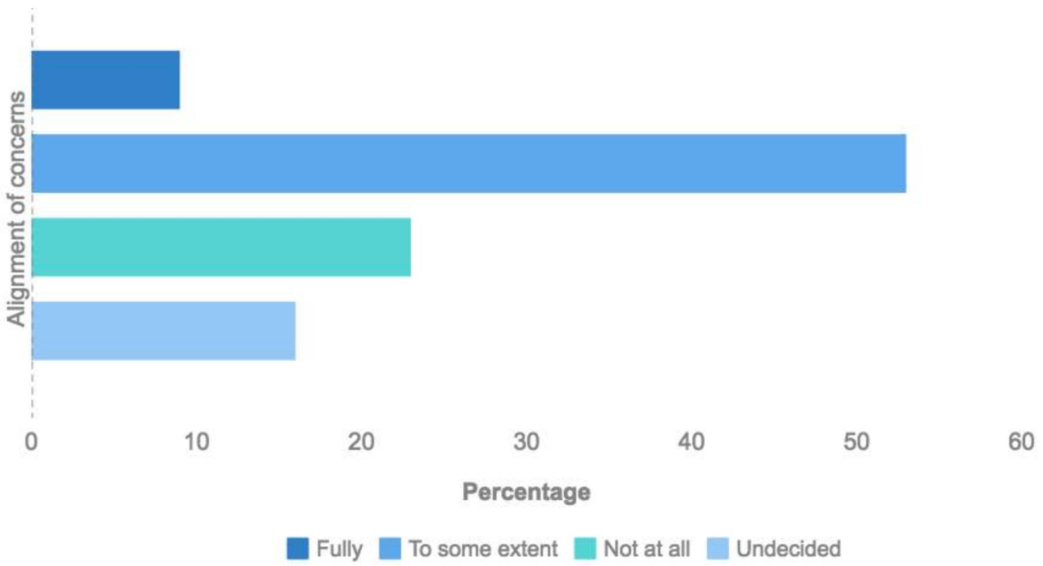
Those who had the opportunity to participate in policymaking had a much higher awareness of online security policies in their country, and were also more confident that these either fully (14%) or to some extent (61%) corresponded with their own concerns.

Perceptions of the extent to which Internet security-related policies in APAC aligned with respondents' human and civil rights also differed, but were mostly positive. The majority of survey participants felt that these policies were compatible with their right to education (88%) and their right to associate peacefully (76%). More than half thought that these

[10] In rural areas, less than a third of respondents had access to free Wi-Fi in restaurants (33%), cafes (27%) and shopping malls (23%)
[11] Data portability refers to the ability to move cloud-based data to a different service provider

posed no conflict with their freedom of thought and belief (65%), their freedom to receive and impart information (65%) and their right to freedom of expression (55%). But one concern tipped the scale to the other side, with a little over half (52%) believing that these policies are not compatible with their right to privacy.

**Respondents on the extent to which Internet security policies reflected their own concerns**




Internet users however were somewhat less decisive about the impact of online security policies on their online activities: 53% of respondents indicated that these policies have not increased their confidence in being able to use the Internet securely. And only 34% agreed that they were fully appropriate to the real threats and risks encountered online. On a more positive note, 54% felt that these policies did not prevent them from using the Internet for purposes that are legal, such as accessing content and services that don’t contravene existing laws.

## Conclusion

The results of this year's Asia-Pacific Internet Policy Survey show that stakeholders in the region continue to hold connectivity - and security - related issues paramount, and felt that these same concerns needed urgent attention from governments.

That just over a quarter of respondents have had the opportunity to participate in government policymaking for the Internet in the past year, and the vast majority of those who have provided a response—and felt positive about the impact of their comment--attest to the significant interest of Internet users to provide input, and underlines the importance of opening up new avenues for stakeholders to contribute to such processes both as individuals and as part of a group. This includes expanding online channels as more and more people rely on email and social media to receive news from and about government activities, and on online platforms to collaborate and comment on current affairs.

Mobile data connection has become an important method of Internet access for respondents, especially for rural, low-income and younger Internet users. Overall, however, the modes of access available to Internet users on a daily basis remain limited.

There are parallelisms in the Internet experience of those who spend more than one-third of their income and those in rural dwellers: Both segments, for instance, tend to pay more for lower connectivity speeds. While there are a growing number of spaces offering free Wi-Fi, the study's findings suggest that many of these places are private establishments. Promoting both redundancy in Internet access and the availability of public access points that offer free or low-cost connectivity is crucial not only in developing an information society but also a digital economy: Already, nearly three-fourths of the respondents indicated that they use the Internet not just for personal purposes but also for business.

Data protection, along with reliable access, were cited as the two most crucial factors for building trust in the Internet. And while many respondents believed that policies on online security in their country were largely compatible with their human and civil rights, this view did not extend to privacy online.  Significantly, a substantial proportion of survey participants felt that these measures have not increased their confidence in being able to use the Internet securely—neither were they proportionate to the real risks encountered online.

With the majority indicating that online security policies in their country do not or only partially reflect their own online concerns, there is a clear need to address the gap between policy priorities in security on the Internet and the issues that are deemed most important by Internet users.

Please send all comments and feedback to:

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