

# Asia Pacific Network Information Centre (APNIC) Survey 2014

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10 September 2014

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## 1. Overview

APNIC conducts a biennial survey to better serve its Members and Stakeholders by gathering feedback regarding its performance and uses the feedback for strategic planning to decide services to offer or improve, for positions to adopt and for issues to pursue.

The APNIC Survey 2014 was conducted in collaboration with the Singapore Internet Research Centre (SiRC), a research institute focusing on various Internet-related issues in the Asia Pacific region. This is to ensure that survey respondents can offer their feedback freely and frankly, with an assurance of anonymity.

The following topics were covered in the 2014 Survey: APNIC General Services (and service delivery), APNIC's external relationships and stakeholder engagement, APNIC's feedback mechanisms, Training Services, Policy Development Process, use of Member Funding, Process Transparency and the workings of the APNIC EC. Appendix I has the full survey questions.

A large number of questions and the overall survey structure were overhauled from the 2012 Survey. For comparison, the areas covered in the 2012 APNIC survey were: APNIC General Services; Registry and Administration Services; APNIC Outreach, Training and Conferences; IPv6 Support, APNIC Public Information and Internet Governance.

The questions for the 2014 Survey were developed with inputs from a series of consultations in the following cities: Melbourne (Australia), Dhaka (Bangladesh), Yangon (Myanmar), Vientiane (Laos DPR), Colombo (Sri Lanka), Ulaan Bator (Mongolia), Islamabad (Pakistan), Hong Kong SAR, and Beijing (China), Mumbai and Chennai (India), Tokyo (Japan), Jakarta (Indonesia), Kuala Lumpur (Malaysia), Nouméa (New Caledonia), Auckland (New Zealand) Singapore, and Taipei (Taiwan). These discussion groups raised issues of concern or interest that were then included in the Survey for further study.

The Survey, conducted from 11 June, 2014 to 11 July, 2014 was completed with a total of 1,039 valid responses. This is a decrease of 22.1% over the 1,333 valid responses in the previous survey. The bulk of the decrease may be attributable to a lower turnout from three large economies: China (about 250 fewer), India (about 100 fewer) and Indonesia (about 100 fewer).

Of the valid responses, 672 (64.7%) were from APNIC account holders (those who have signed Membership or Non-Member service agreements with APNIC) and 367 (35.3%) were from others. Most (987 or 95%) were from 40 out of the 57 economies served by APNIC; only 5% (52) were from outside of Asia-Pacific.

## 2. Method

The full details of this section can be found in Appendix II.

## 3. Summary of Results

### 3.1 Analysis of survey response

The Survey was structured for two groups: the “Main Survey” for those who are APNIC account holders, and “Other Stakeholder Survey” for those stakeholders without a formal membership or service relationship with APNIC. It should be noted that the open nature of the survey means that those from economies outside the Asia Pacific may also participate. These respondents were included in the analysis, and constitute about 5% of the survey cohort. Table 1 categorises the economies that respondents identify themselves as coming from.

**Table 1: Classification of Economies**

Developed Economies	Australia, Belgium, Canada, Germany, Japan, Netherland, New Zealand, Norway, Sweden, Switzerland, United Kingdom, and United States
Responses	256 (24.6% of total responses)
Developing Economies	American Samoa, Brunei, Cameroon, China, Cook Islands, Fiji, French Guiana, Guam, Hong Kong, India, Indonesia, Iraq, Macao, Malaysia, Maldives, Micronesia, Mongolia, New Caledonia, Niue, Pakistan, Papua New Guinea, the Philippines, Samoa, Singapore, Saudi Arabia, South Korea, Sri Lanka, Suriname, Tonga, Taiwan, Thailand, Venezuela and Vietnam
Responses	602 (57.9% of total responses)
Least Developed Economies (LDEs)	Afghanistan, Bangladesh, Bhutan, Cambodia, Lao People’s Democratic Republic, Myanmar, Nepal, Timor-Leste, Solomon Island and Vanuatu.
Responses	181 (17.4% of total responses)

In this Survey, the participatory economies were defined as *Developed*, *Developing* and *Least Developed Economies (LDEs)* in accordance to the classification by the United Nations<sup>1</sup> and grouped accordingly in Table 1. It should be noted that the UN classification may be out-dated as

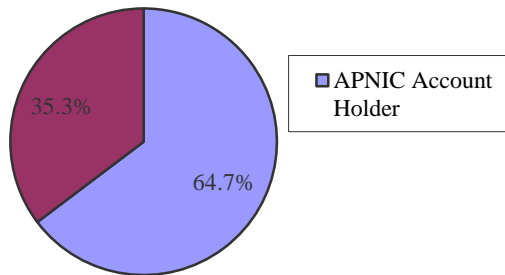
<sup>1</sup> The UN classification is available at <http://unstats.un.org/unsd/methods/m49/m49regin.htm>.

Hong Kong, Singapore and South Korea are listed in the Developing category while Christmas Island, because it is a part of Australia, is classified as Developed. In this report, the UN position is adopted for consistency of definition.

Table 1 also shows the largest number of respondents (602 or 57.9%) was from Developing Economies, understandably as China and India are included in the group. The LDEs continue to form the smallest group of respondents at 181 (17.4%). This is a significant increase from 136 (10.2% of total) in 2012.

As the chart below shows, almost two-thirds of the respondents were APNIC account holders.

3. What is your relationship with APNIC?



In this Report, the results for each question are presented with the self-explanatory heading of the section, followed by a diagram showing the question and the average score on the right side of each bar to the question. For many of the questions, the respondents were asked to evaluate certain aspects of APNIC services in the scale of 1 to 7, 1 being Poor or Low Priority or Least Focus or Very Unsatisfied to 7 being Excellent or High Priority or Most Focus or Very Satisfied, depending on the question. The Survey also provided multiple-choice and free-response questions to allow respondents room to elaborate on their views.

Where the questions allow, responses are compared with previous surveys. However, because some of the samples are not representative and the questions and survey structure overhauled from 2012, such comparison should be treated with caution, and interpreted with other responses.

### 3.2 Survey Findings

The following analysis presents a summary of the statistical and open-ended survey results.

The results for all sections are mainly outlined in a combination of three different response types:

- a scale of 1 to 7 with 1 being Poor/Low Priority/Least Focus/Very Unsatisfied and 7 being Excellent/High Priority/Most Focus/Very Satisfied,
- multiple-choice responses, and
- a Yes/No.

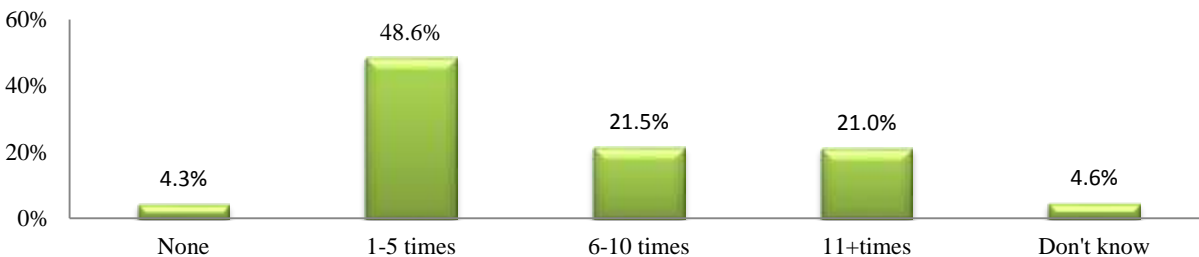
Where a respondent omitted any question or indicated “N/A”, no score was recorded in the analysis, and that response included in percentage calculations.

All comments from the open-ended questions are contained in Appendix III. Average scores comparing responses by economy are recorded in Appendix IV.

#### 3.2.1 Main Survey

This section was intended for APNIC account holders only and they were asked to comment on APNIC’s services, registry and administration services, training and corporate governance.

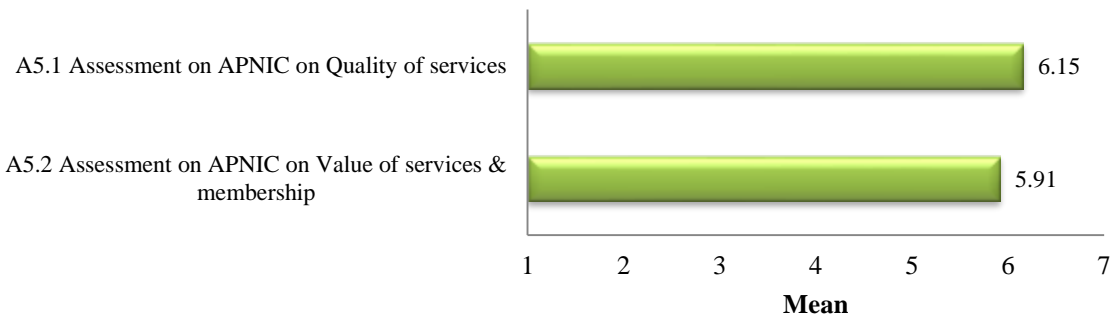
#### A4. Frequency of use of APNIC service or interaction with APNIC in the past two years



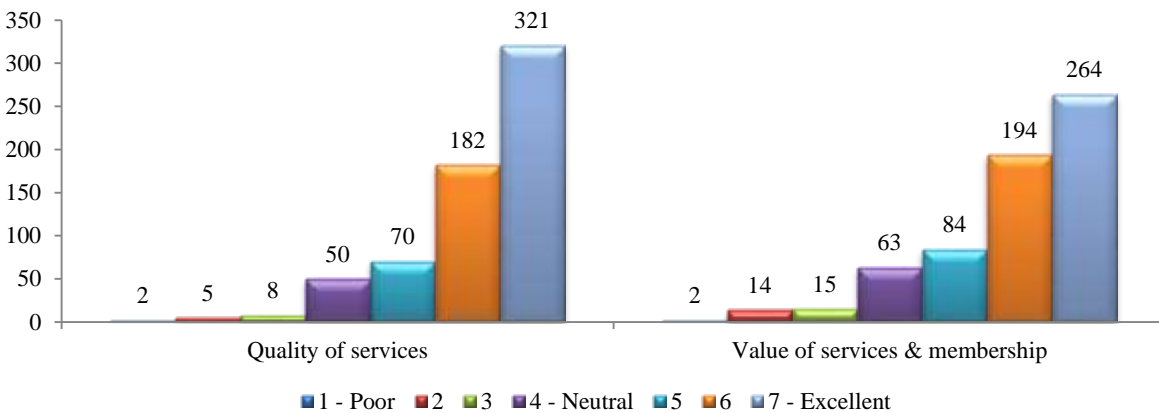
Overall, account holders were satisfied with APNIC’s various services. Almost half of survey respondents (48.6%) had used an APNIC service at least 1-5 times in the past two years and 47.9% of them were from developing economies. Only 4.3% had never used an APNIC service, mainly

from developing economies as well.

### A5. Assessment of APNIC performance in general

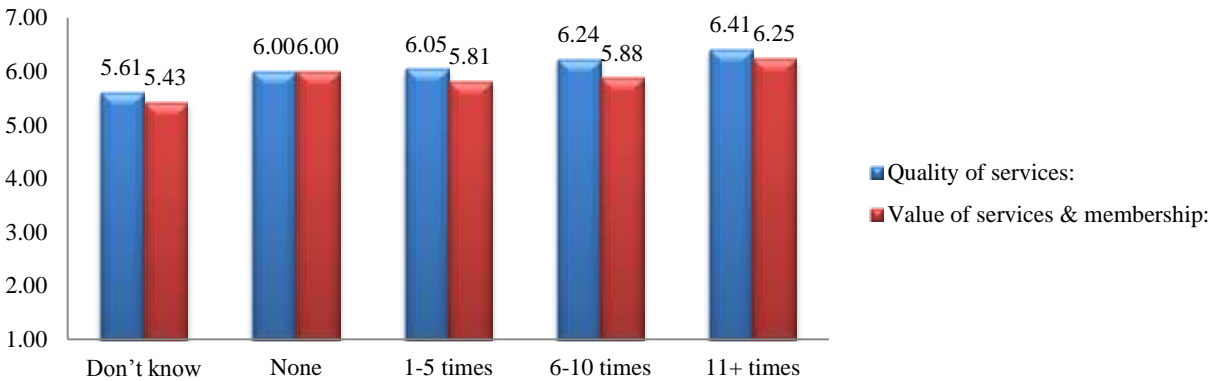


APNIC account holders were generally well satisfied with the services provided by APNIC, reflecting high satisfaction. Respondents from developed economies were less likely to be satisfied with the value of services and membership. There is no significant difference in opinion between the developing and LDEs.



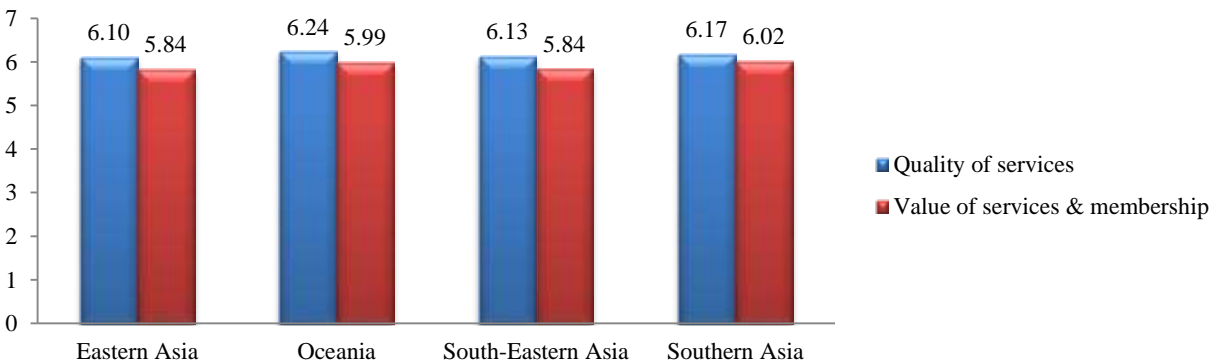
As shown above, half the respondents gave APNIC 7/7, the highest rating, for the quality of APNIC services while 41.5% of respondents gave APNIC 7/7 for value of services and membership. The percentage of respondents who rated APNIC service quality positively (5/7 or higher) was 89.8% against 2.4% who rated APNIC's service quality negatively (3/7 or lower); the percentage of respondents who rated APNIC's service value positively was 85.2% (vs 4.9% rating it negatively). Across economies, respondents from developed economies were, overall, more likely to rate APNIC service value lower than respondents from developing and least developed economies (LDEs). The difference between developing and LDEs was not significant.

**A5a. Assessment of APNIC performance in general vs number of times respondents have used APNIC services**



When this question is correlated with responses to the number of times respondents have used APNIC services, we find no significant variation in ratings. Respondents who say they have used APNIC services 11+ times in the last two years gave both quality and value of services the highest average ratings – 6.41 and 6.25, respectively.

**A5b. Assessment of APNIC performance in general vs subregion**

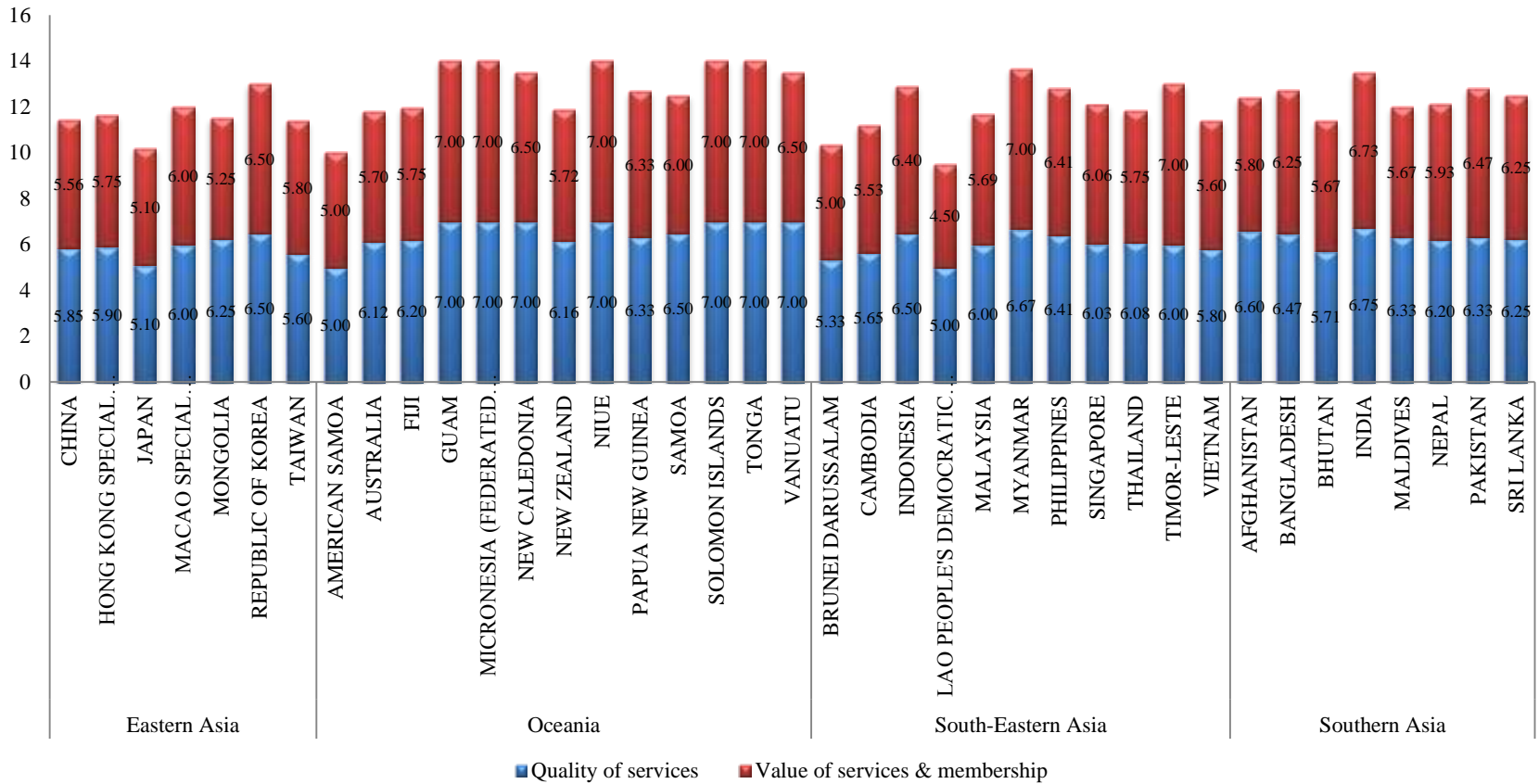


There was no correlational difference in ratings by region. Southern Asia registered the highest ratings, with averages of 6.17 and 6.02 for quality and value of services respectively. Southern Asia and Oceania registered averages marginally above the overall ratings, while Southeast and Eastern Asia registered ratings marginally below.

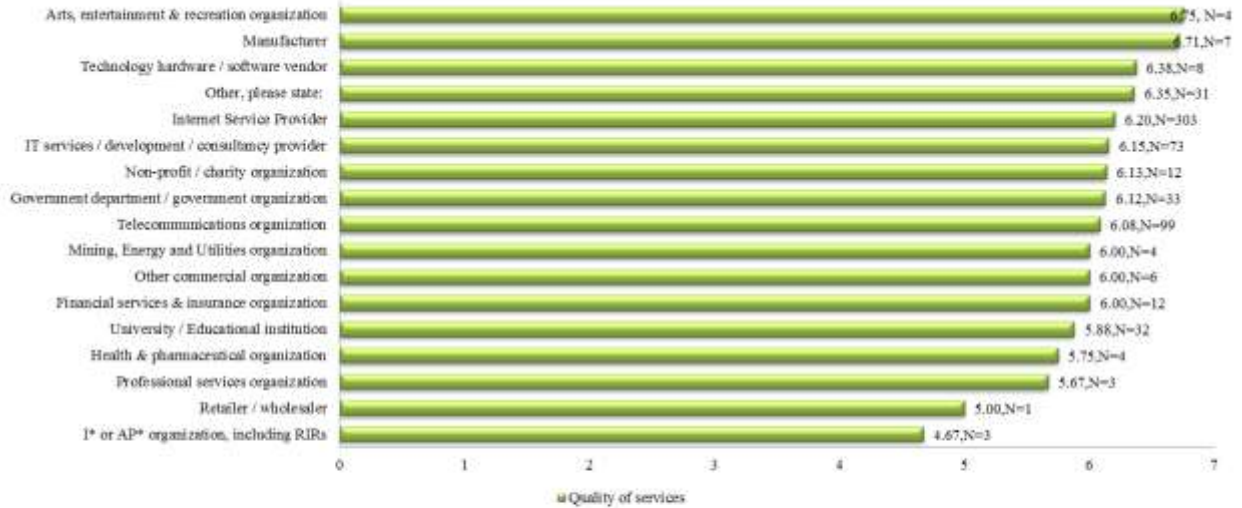
A more detailed breakdown of ratings across countries and economies is given below:



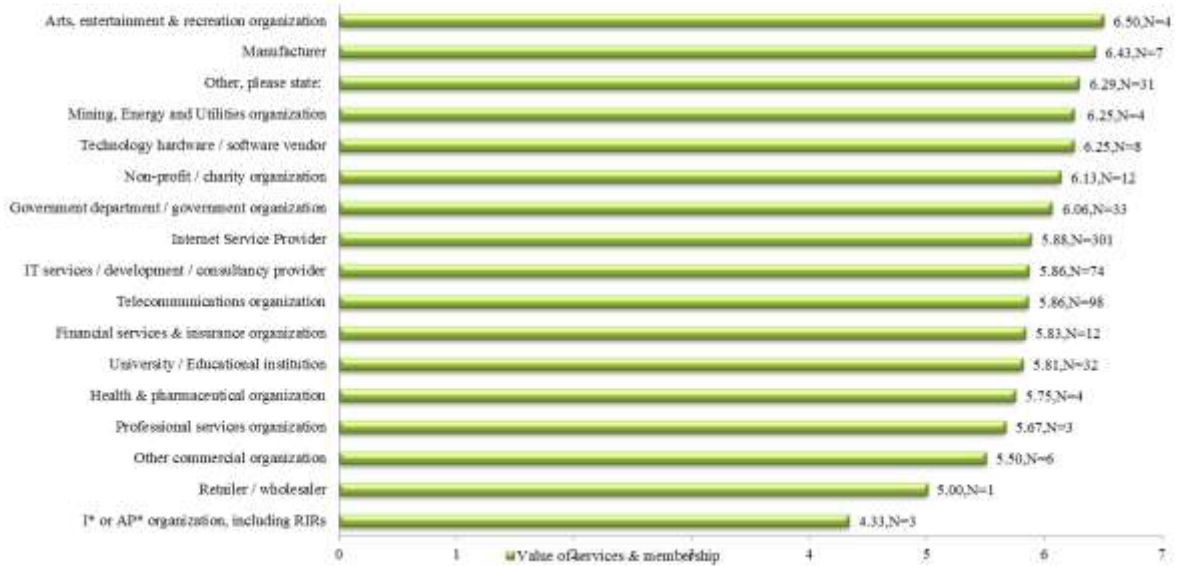
### A5 Assessment of APNIC's quality and value of services vs economies



**A5.1 Assessment of APNIC's quality of services vs type of organization**



**A5.2 Assessment of APNIC's value of services & membership vs type of organization**

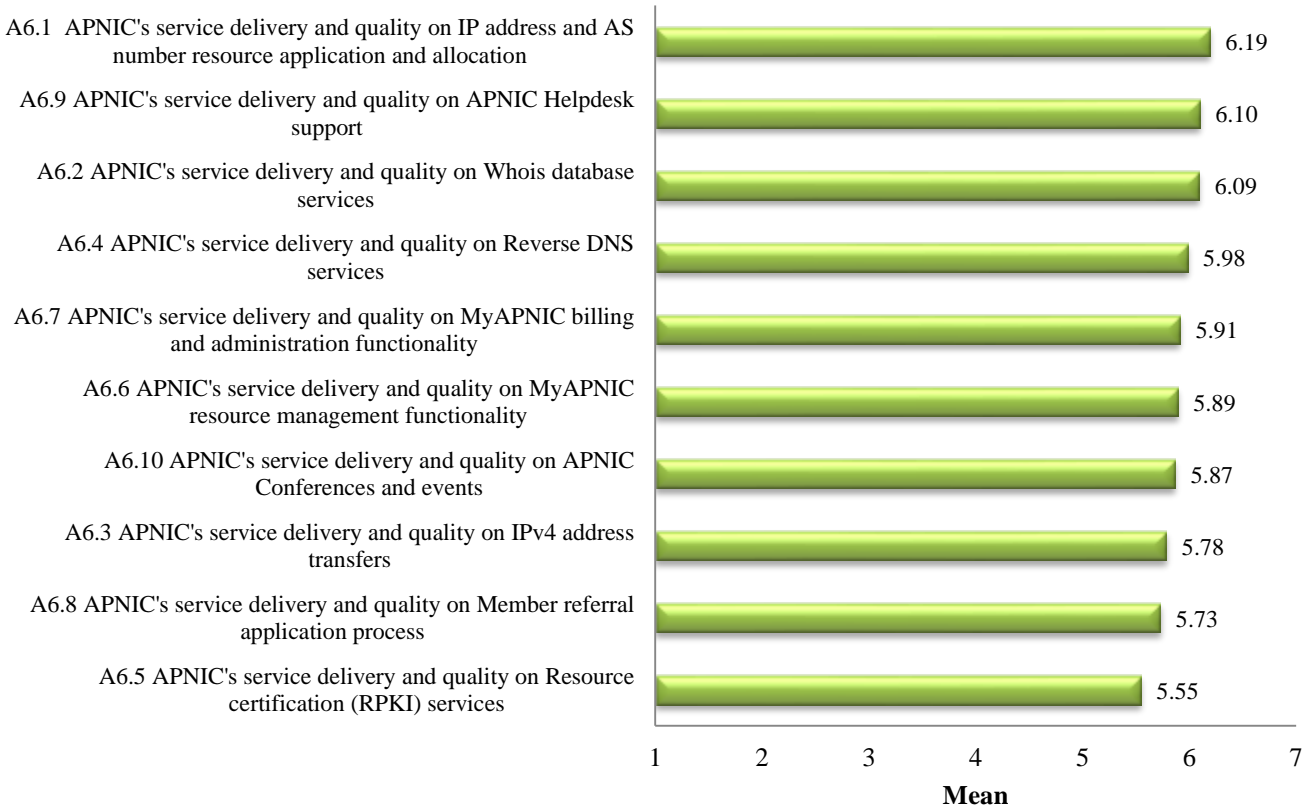


Among types of organisations, the largest category were ISPs (303 respondents) and they gave APNIC an overall rating of 6.20 in quality, and 5.88 in value (n=301). The lowest ratings in the chart above were from retailers and “I or AP organization, including RIRs” which must be qualified with the caveat of the low number of respondents.

**Comparison with 2012**

The level of satisfaction in this survey increased over the previous. It is 6.15 on a 7-point scale vs 5.71 in 2012. The value of services also went up, from 5.34 in 2012 to 5.91 in 2014.

**A6. APNIC service delivery and quality ratings:**



On the whole, account holders also expressed satisfaction with individual domains of APNIC services. Account holders had the highest mean score for service delivery and quality on IP address and AS number resource application and allocation, with no significant difference in opinion between the types of economies involved in this survey.

Most (89.4%) respondents rated APNIC’s IP address and AS number allocation positively with more than half (55.1%) rating it 7/7; only 2.9% of the respondents rated the allocation negatively. Similar results held for quality of APNIC Helpdesk Support with most (86.3%) expressing satisfaction and only 3.6% rating the support negatively. LDEs, in particular, expressed high levels of satisfaction with APNIC’s conference events (6.35/7).

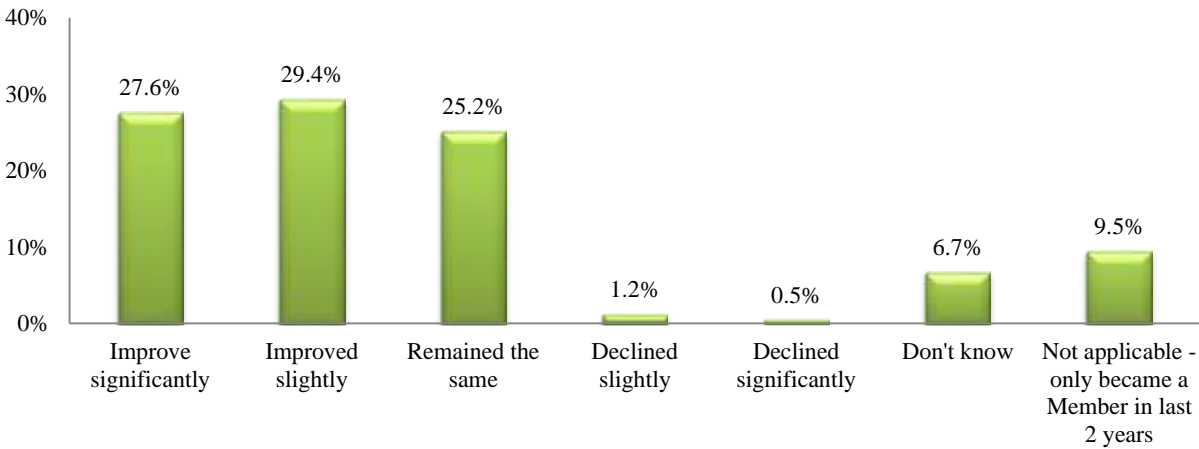
As with the last Survey, APNIC's RPKI resource certification services (A6.5) had the lowest relative satisfaction from developed economies, with a score of 4.86/7. Although most (71.2%) rated the service positively, some 5.3% of all respondents rated it negatively, with 23.5% of respondents giving it a "neutral" (4/7 rating).

In every question in this section, LDEs had the highest average mean satisfaction scores, followed by developing economies and developed economies. There was one exception: developing economies expressed highest relative satisfaction with APNIC's MyAPNIC resource management functionality.

On APNIC's service delivery and quality on Whois services, developed economies were likely to rate it lower compared with LDEs. The same pattern was noticed in the responses to the question of IPv4 transfers, RPKI services, MyAPNIC resource functionality, MyAPNIC billing, and the member referral application process. On four of these categories – MyAPNIC resource management, MyAPNIC billing, RPKI services and member referral application process, there was a similar mean rating difference between developed and developing economies as well.

In the comments, several respondents praised APNIC's good and timely support, as well as its friendly staff. But comments given suggest usability and technology issues regarding the technology platforms on which APNIC provides its services. Some respondents emphasized the importance of APNIC providing more training, especially localised training programme. A handful of respondents from Philippines and Bangladesh commented that MyAPNIC in particular was not easy to use and could do with an interface overhaul. The Helpdesk's level of service was a concern for several respondents from Cambodia and Thailand, who commented that the response from Helpdesk was not fast enough, needed to be multilingual (comment from a Chinese respondent) and should serve members 24/7 (comment from a Nepal). Other requests included telephone support for India, better geolocation services and bill cycle/mode related issues.

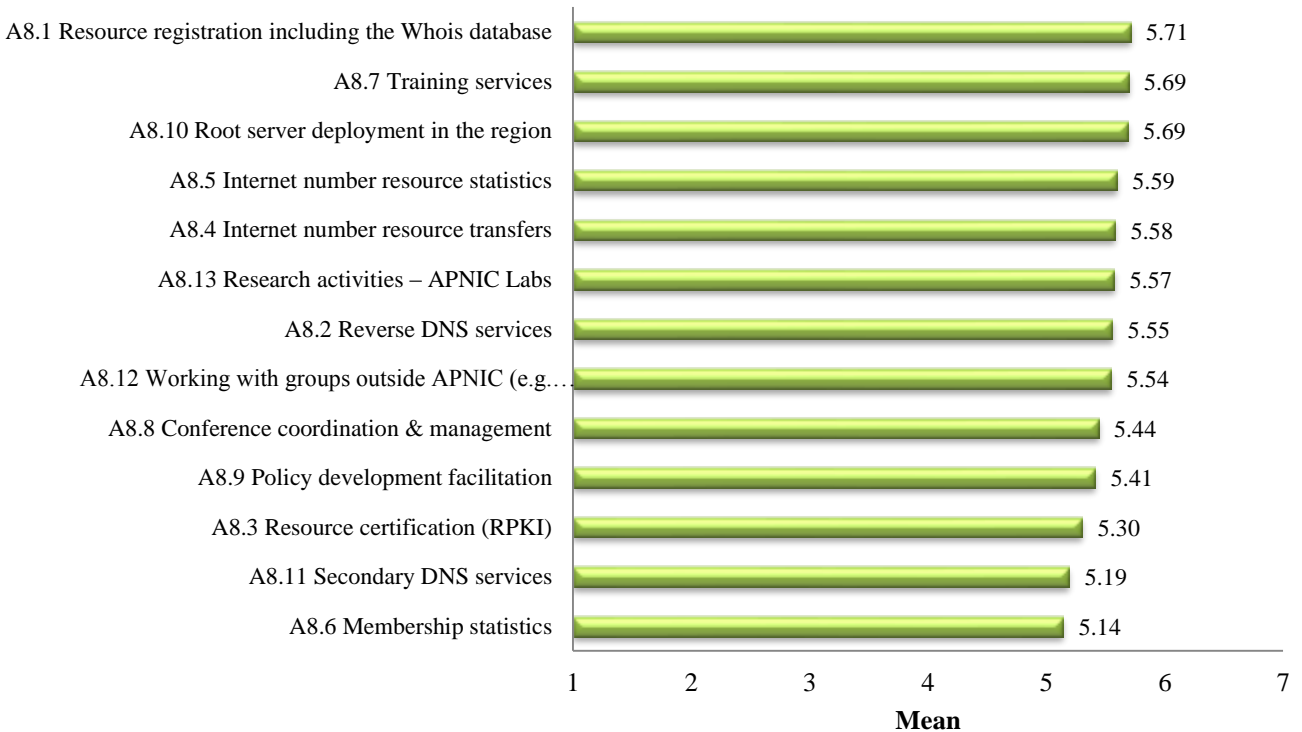
**A7. APNIC’s service delivery and service quality to your organisation has:**



On APNIC’s relative performance over the last two years, more than half (56.9%) said that APNIC service delivery had improved “significantly” or “slightly”; a marginal 1.7% said they observed a “decline” in service quality. Of those who answered that service delivery had “improved significantly”, 96.1% were from developing or LDEs; of those who answered that it had “improved slightly”, 82% were from developing or LDEs. Almost half (48.8%) who answered “Don’t know” were from developed economies.

Most respondents said their relationship with APNIC was “business as usual” – with service delivery remaining good and of high quality. Some respondents also noted that incremental improvements were being made with MyAPNIC and other online platforms, but more could still be done.

**A8. APNIC should place priorities on the following activities in future:**



On the whole, respondents placed higher priority on Whois services, training and root server deployment in the region.

A third (33%) of the respondents gave the highest priority (7/7) for Whois services, 39.8% for training and 36% for root server deployment in the region. Respondents from the LDEs placed higher priority in training services, root server deployment in the region and working with groups outside APNIC (e.g. government) compared with respondents from the developing and developed economies. Respondents from South Asia requested more root servers in their region. APNIC engagement with NOGs (network operator groups) and technical organisations was seen as a positive move. Some respondents from New Zealand, Fiji and the Philippines who provided comments requested more awareness programs on IPv6 transition, while others requested more time-zone specific online training programmes.

Correlating these responses with later questions on how APNIC should use surplus funds (Q19, see pages 19-20), respondents who chose training services and Root server deployment in the region indicated a higher priority in “Increase fee subsidies” with APNIC surpluses. That is, respondents would like the surplus funds to be used on themselves as subsidies in training and Root server deployment.

Respondents who chose “Increase fellowships to encourage more attendees from developing economies to attend APNIC meetings” indicated a low priority (5.19/7) for membership statistics.

Respondents who chose “Increase the number of APNIC trainers employed and APNIC training courses delivered” indicated a low priority for Secondary DNS services and membership statistics (with mean of 4.85/7 and 4.98/7).

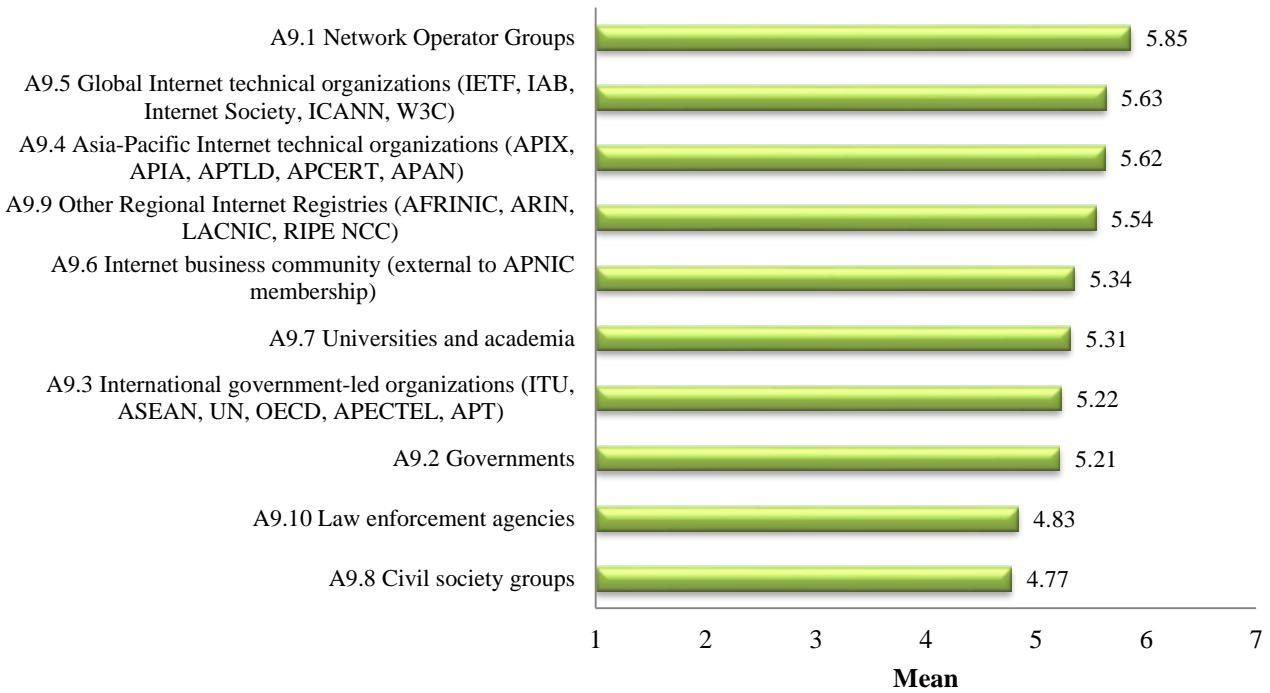
Respondents who chose either “Invest in improving existing membership Services”, “Provide grants to community projects across the Asia Pacific to encourage networking skills”, “keep increasing the financial reserve” or “Reduce total member fee revenue” as priorities for use of the APNIC surplus all indicated higher priority for training services.

Finally, respondents who chose either “Lower training fees” with APNIC surpluses or “Increase APNIC financial investments”, “Greater promotion efforts around IPv6”, “Invest in developing new member services” did not seem to indicate any particular preferential priority for APNIC future activities.

Training jumped from 5<sup>th</sup> to 2<sup>nd</sup> place. APNIC’s external relations and conference coordination also saw a jump, from 11<sup>th</sup> and 13<sup>th</sup> on the 2012 survey to 8<sup>th</sup> and 9<sup>th</sup> in 2014. In the 2012 survey, Resource Registration (including the APNIC Whois Database), Root Server Deployment and Reverse DNS services were the top three stated priorities. Reverse DNS fell this year to 7<sup>th</sup>. It should be noted that this question was reframed slightly for the current survey, and the list of options was not identical. Therefore, direct comparisons are not fully representative of changes.

In past surveys, many, particularly from the developing economies (such as China and India) emphasized the importance of broader training opportunities through workshops, online/webinar trainings, regional trainings and conferences, as well as engaging with groups and institutions outside of APNIC. This was the focus of the next question.

**A9. APNIC aims to strengthen relationships with other organisations that can help APNIC carry out its vision and mission. APNIC should focus its efforts on:**

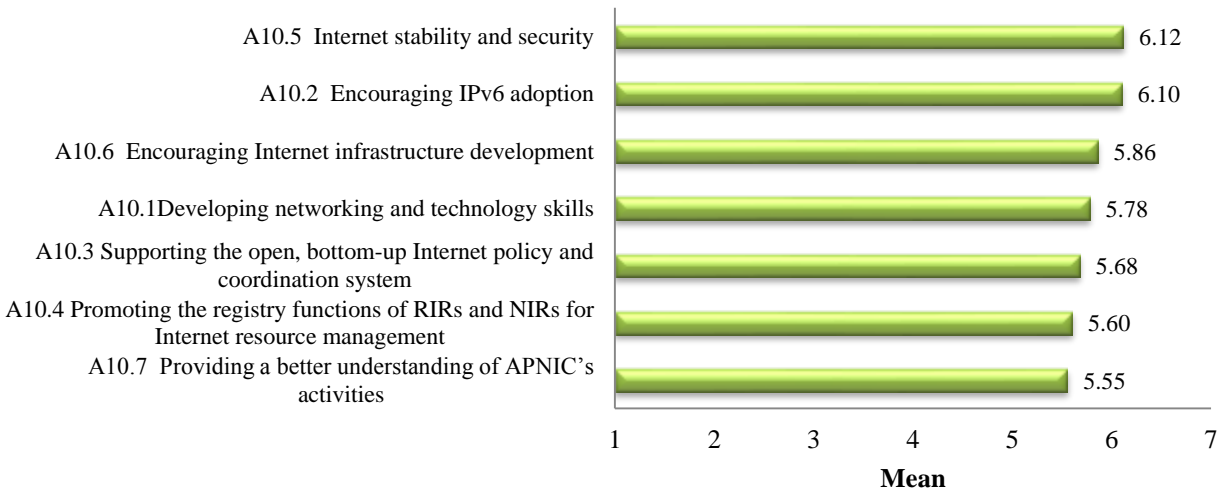


Most respondents (83%) said that APNIC should focus its effort on strengthening relationships with the network operator groups in order to carry out its vision and mission; almost half of this group (40.6% of the respondents) rated it 7/7. Many LDE respondents felt that APNIC should engage with NOGs. Both developing and LDEs mentioned Global Internet technical organisations and Asia-Pacific Internet technical organisations on their priority lists. Engaging with governments, law enforcement agencies and civil society groups were lower on the priority list. Some 40.6% of respondents rated engagement with NOGs at 7/7, or “most focus” while 6.3% of respondents rated engagement with law enforcement agencies a 1/7, or “least focus.” Almost a third (32%) of respondents were “neutral” (4/7) on civil society groups, compared with 12.7% for NOGs.

A few respondents from Bangladesh commented that they lacked of knowledge about how APNIC can engage with law enforcement, governments or civil society organisations. A few commenters said that engaging with NOGs and technical organisations may be the best move for APNIC, rather than reaching out to governments.



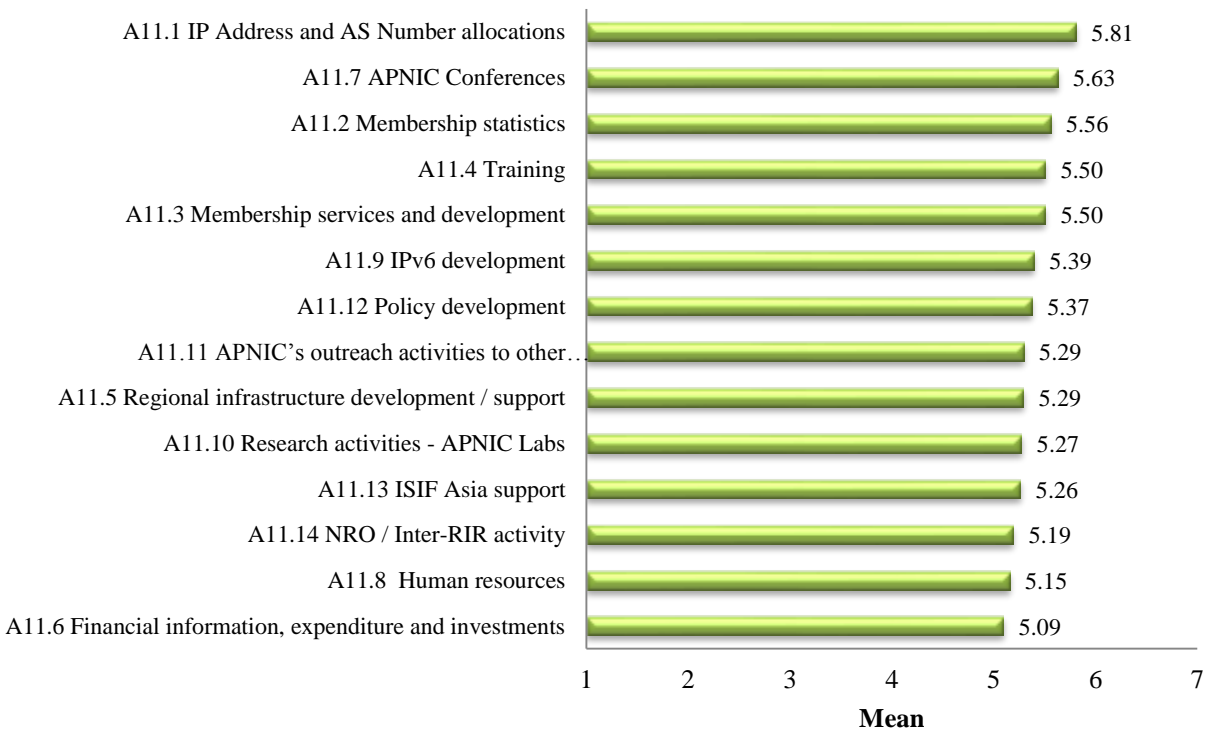
**A10. APNIC should focus its relationship with stakeholder on these topic:**



Respondents felt that engagement should be focused on issues of Internet stability and security, and encouraging IPv6 adoption.

More than half (54.6%) rated a focus on IPv6 as 7/7, while 52.1% gave a 7/7 rating to Internet stability and security. Most LDEs felt that developing networking and technology skills was critical. LDEs also placed a priority on encouraging internet infrastructure and development as well as providing a better understanding of APNIC's activities.

**A11. Satisfaction with content of the APNIC Secretariat's reporting in:**

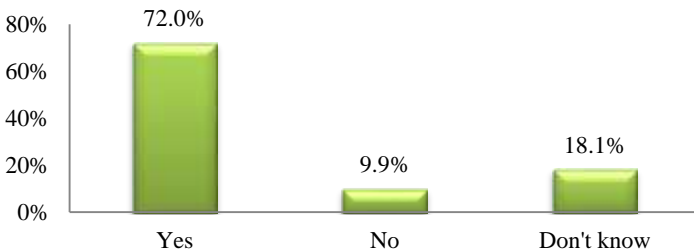


All statements received high ratings, scoring above 5. Respondents were most satisfied with information on IP address ad AS number allocation of the APNIC Secretariat’s reporting. A total of 38.5% of all respondents gave a 7/7 (“most satisfied”) rating to reporting on IP address and AS number allocations where 80.4% rated positively and only 3.7% rated negatively.

Satisfaction with APNIC financial information was rated relatively lower compared with other statements, with developed economies reporting the lowest average mean score of 4.49. Some 9.9% of respondents gave reporting on Financial information, expenditure and investments a rating of 3/7 or below, with more than a quarter (26.3%) rating it 4/7 or “neutral”.

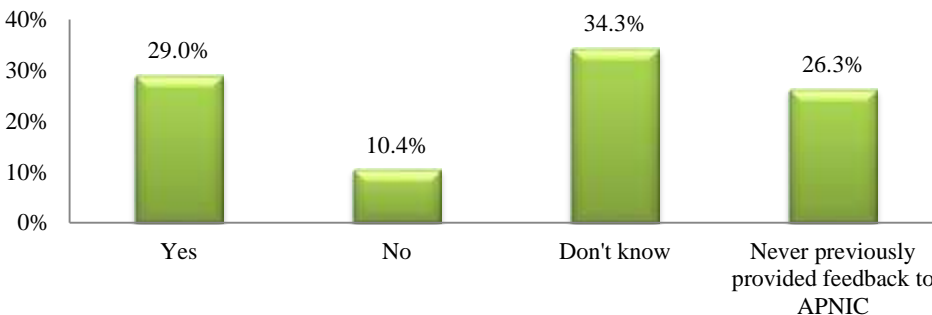
In the comments, several respondents expressed a lack of awareness of the reports, or admitted to not really going through them. Some of the commenting respondents who did read the reports, however, indicated satisfaction with the contents, with one respondent from Micronesia saying, “learning from [them] is an asset”.

**A12. Do you believe Members have enough opportunity to provide feedback and input to APNIC activities?**



Most (72%) members expressed satisfaction with APNIC’s feedback mechanisms and the opportunity to provide feedback; among them, most (80%) were from developing economies. Among those who chose “Don’t know”, more than half (54.5%) were from developing economies.

**A15. If you have provided input to APNIC, do you feel that it has influenced decisions on APNIC operations, services or strategy?**

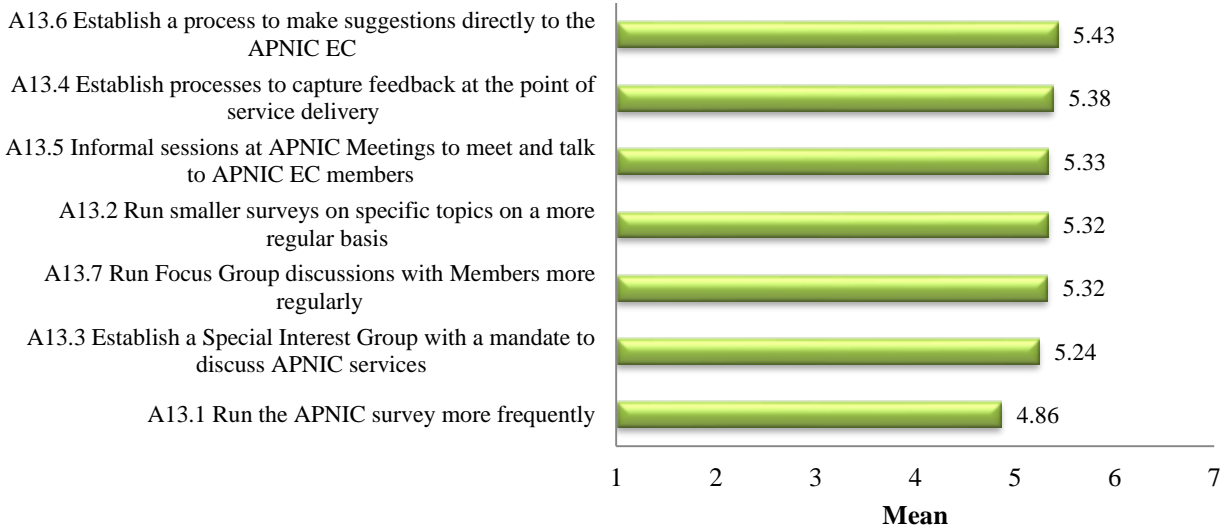


However, 26.3% also noted in a separate question that they had never previously provided feedback to APNIC. In the same question, 34.3% expressed a lack of knowledge about whether their inputs influenced APNIC operations and services; these respondents were mainly from developing economies (54.9%).

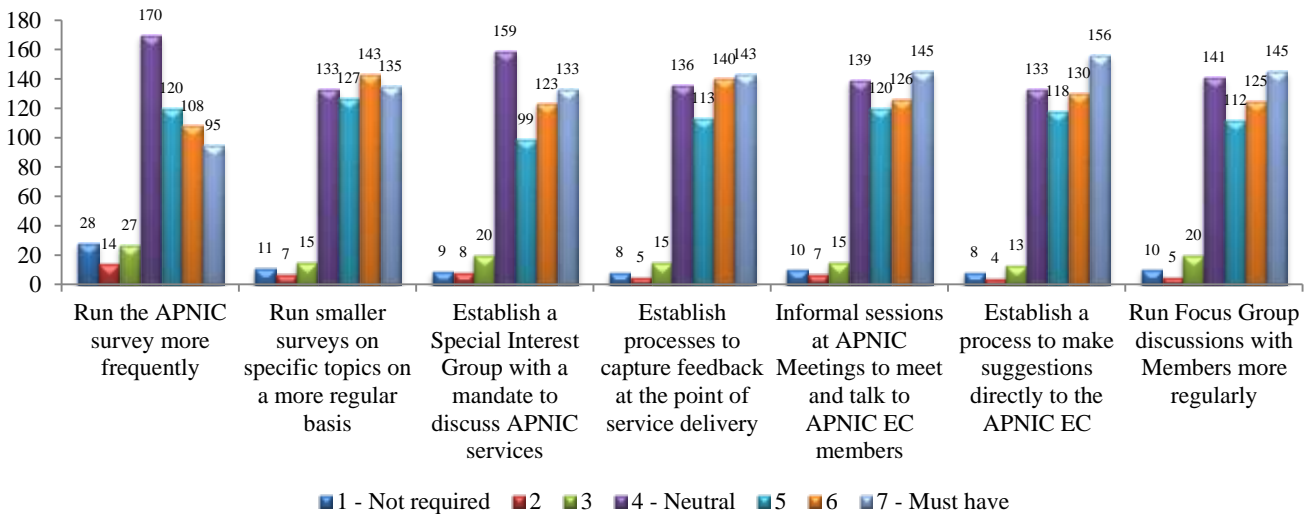
Additional comments came entirely from those who said their opinion had influenced APNIC. Among them opinion was divided as to whether input to APNIC resulted in policy changes or tweaks. Some said that APNIC was swift in responding to feedback and making changes (comments from respondents from India and Indonesia), while others felt that APNIC listened sometimes (comment from a New Zealand respondent), and ignored comments regarding policy on other occasions (comments from respondents from Australia, Cambodia). It is important to

note that the question did not distinguish between feedback on which the APNIC Secretariat could act directly, and questions of policy that may not be within Secretariat’s mandate.

**A13. To ensure Members have enough opportunities to contribute views to inform APNIC activities, you would support this initiative:**



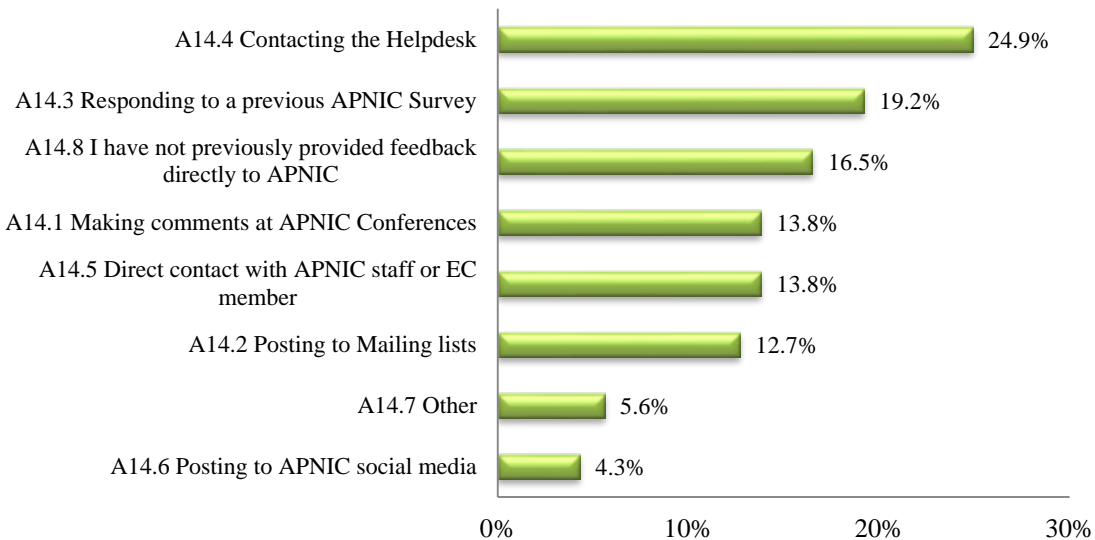
The above questions captured some proposed initiatives that members would support to offer more feedback.



There was broad support for all the listed initiatives, but respondents from LDEs specifically found favour with the suggestion to capture feedback at the point of service delivery (5.94/7).

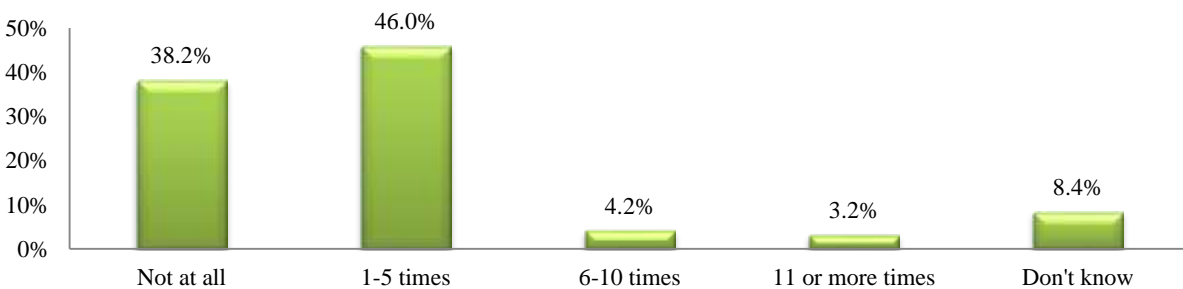
There was least support for the suggestion to run the APNIC survey more frequently from developed (4.25) and developing economies (4.96). Although a little more than half (57.5%) supported the initiative, supported, almost half (42.5%) of respondents gave it a rating of 4/7 (“neutral”) or below, with 5% stating that it was “not required” (1/7).

**A14. Methods used to provide feedback to APNIC:**



The Helpdesk was the most used contact point for feedback and information. More than half of those using the Helpdesk (52.5%) were from developing economies and almost a quarter (23.1%) was from LDEs. Social media postings were the least used method of feedback, and 16.5% said they had not provided any feedback to APNIC in the past two years.

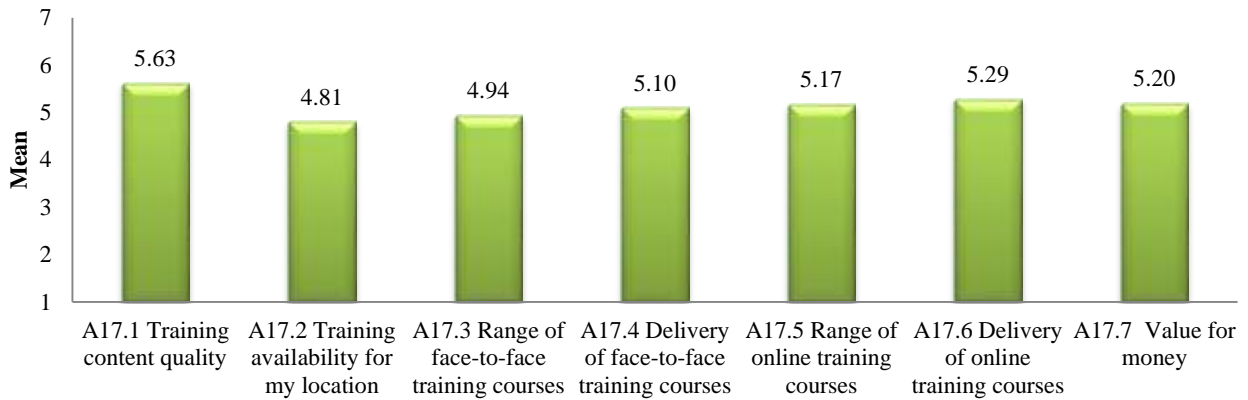
**A16. Frequency of use of APNIC's training services in the past two years**



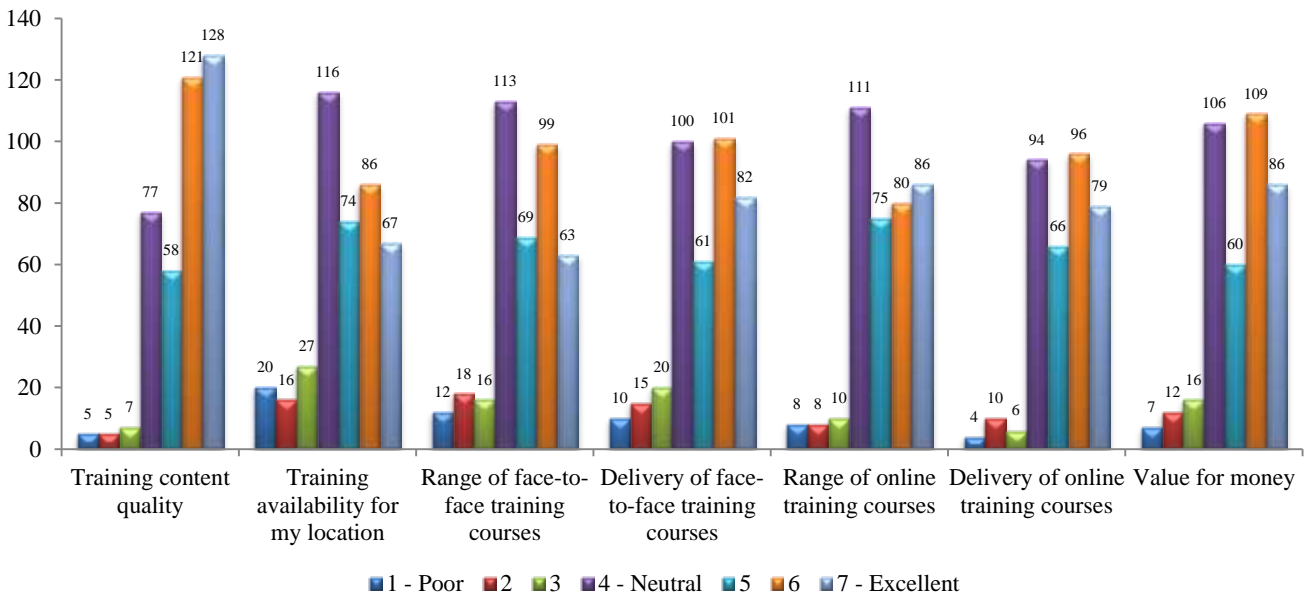
Two-thirds respondents had used APNIC training services at least once with one in 12 (8.4%) apparently using it so much they did not know how many times they had. Among those who used APNIC training services between 1-5 times (the median number of times), some 61.2% were

from developing economies. Almost half (45.4%) of those who answered “Not at all” were from developed economies. Almost three-quarters (73.7%) of those answered “11 or more times” were from developing economies.

**A17. Your assessment of APNIC's training services:**



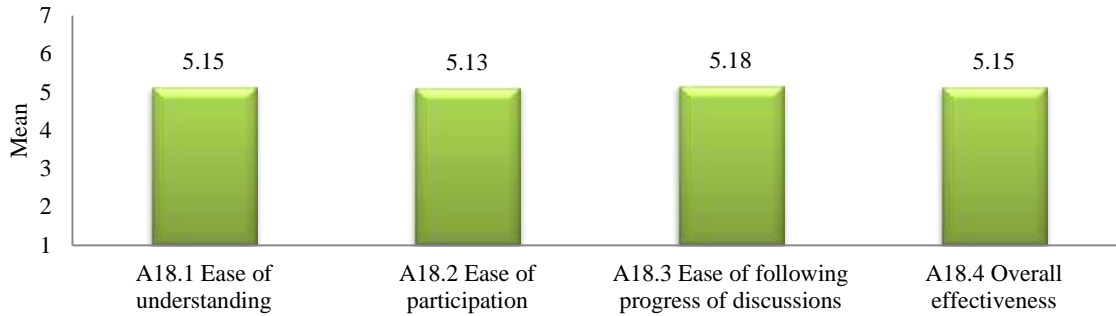
In general, respondents, were satisfied with APNIC training services, particularly those from LDEs who rated the training content quality a high average of 6.09/7.



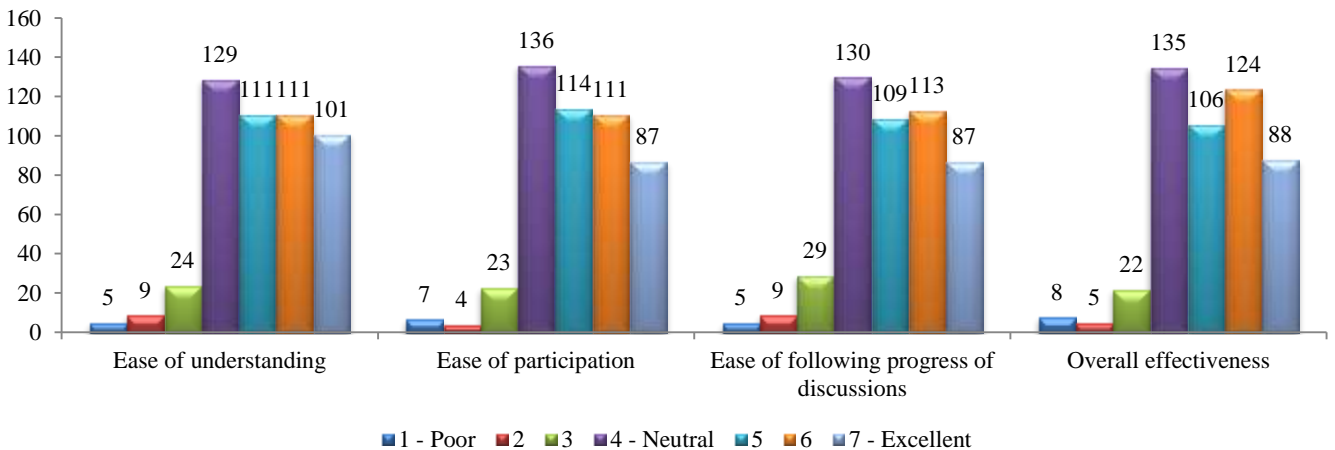
More than half (62.1%) gave training quality a rating of 6/7 or 7/7. Respondents from developed economies gave the lowest relative ratings to “availability” of training courses for location, while opinion varied between the developing and least developed economies. While more than half (55.9%) rated “training availability” positively, some 15.5% rated it at 3/7 or lower.

Three respondents commented that training should be free for members. Others suggested training programs on new topics and in local languages.

**A18. Assessment on APNIC’s Policy Development Process for developing Internet Number Resource management policy:**



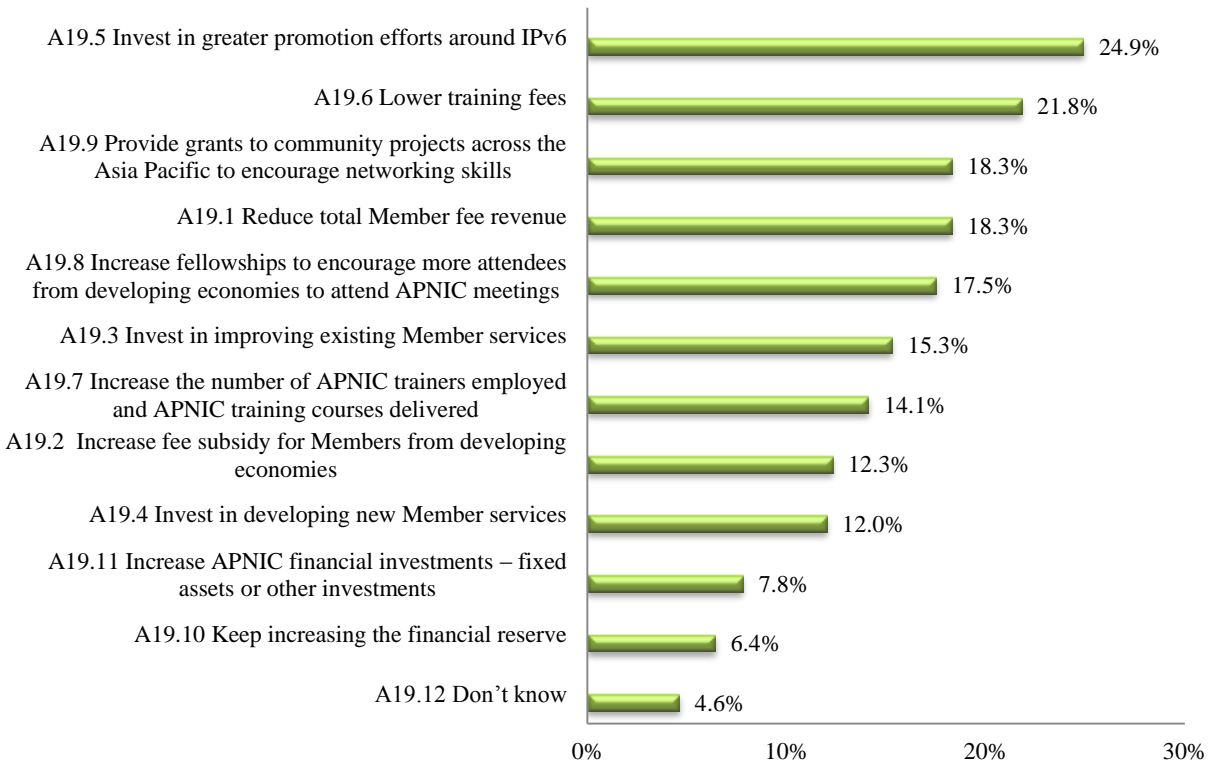
There was broad satisfaction with APNIC’s policy development process, with most respondents indicating satisfaction levels above 5.



However, it is worth noting that as a percentage of total respondents, more respondents chose a “neutral” rating (4/7) for this question than any other on the Survey. More than a quarter (28%) of responses for each answer option was “neutral”. Ease of following progress of discussions (A18.3) had the highest satisfaction scores with the respondents from developing and LDEs more likely satisfied with following progress of the discussion about APNIC’s Policy Development Process for developing Internet Number Resource management policy.

Satisfaction with Ease of Participation (A18.2) was rated lowest. Developed economies indicated the lowest relative satisfaction (4.68) with ease of understanding; respondents from LDEs indicated the highest relative satisfaction with a mean score of 5.63.

**A19. If exceeds its financial reserves target, APNIC should use surplus funds on:**



Investing in IPv6 promotion efforts was the clearest priority, with nearly a quarter (24.9%) indicating that APNIC should do so if it had discretionary funding. A little more than half (54.1%) were from developing economies.

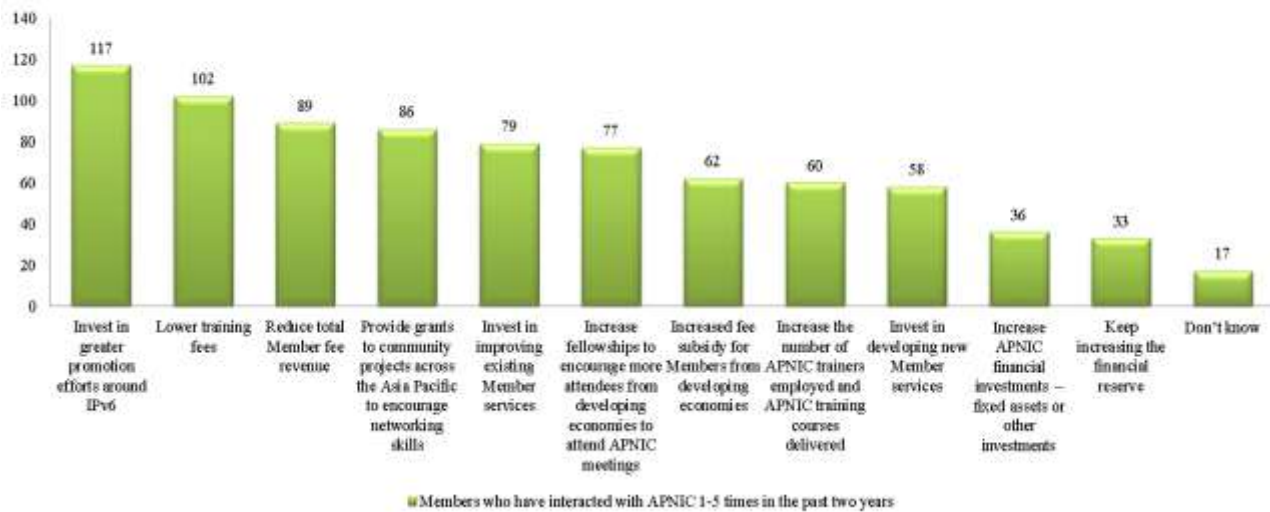
Lowering training fees (21.8%), grants to community projects and lower fees (18.3%) were the next three popular options. Almost a third (31%) of those who placed a priority on lower training fees and of those who wanted community grants (32%) were from LDEs.

Other suggestions made in the comments from the respondents included:

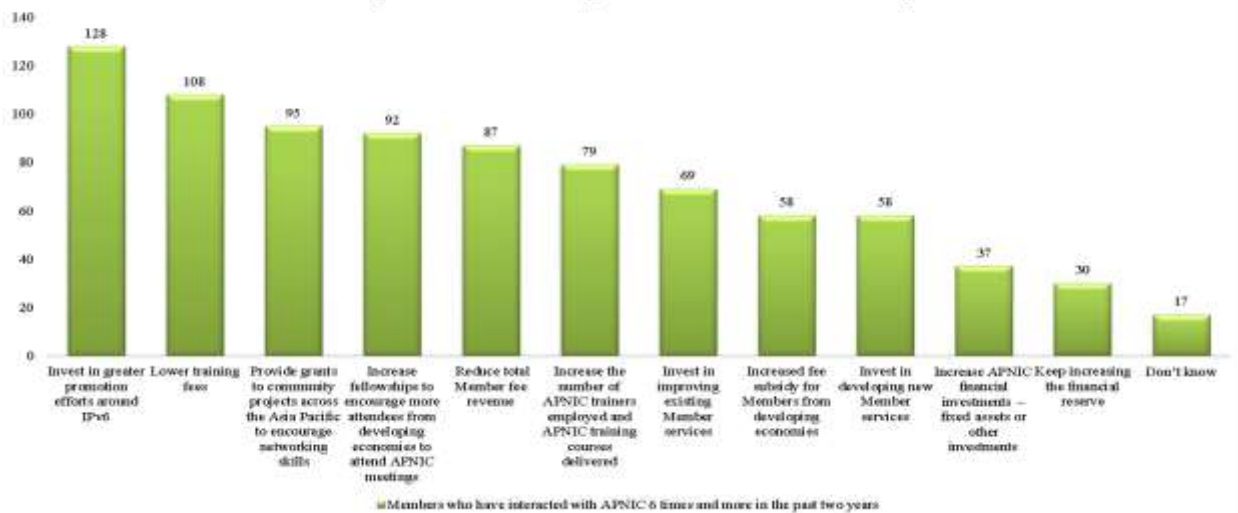
- Raise APNIC’s profile to the public (comment from Australia),
- Collaborate with the experts in the region to provide APNIC trainings (comment from Bangladesh), and
- Increase investment in Internet security/technologies (comments from Japan, India, New Caledonia, Singapore).



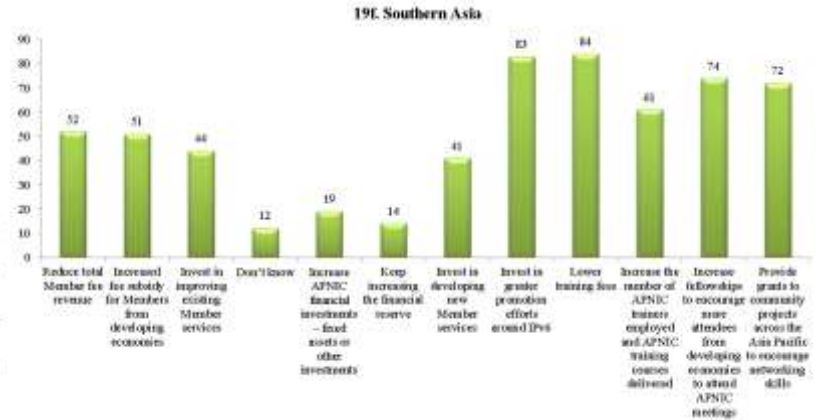
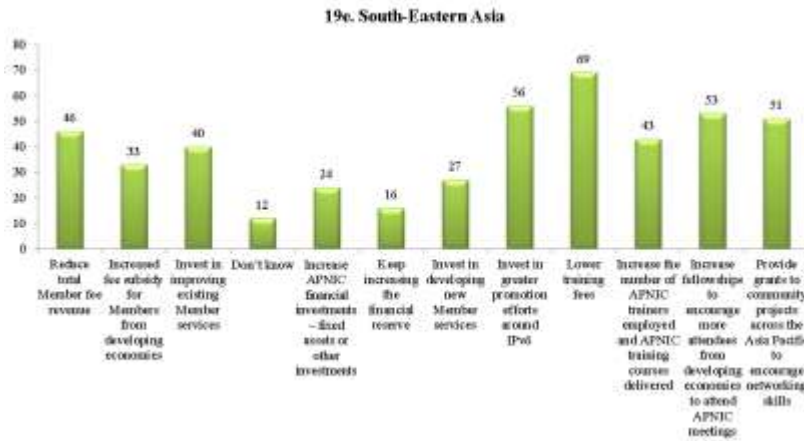
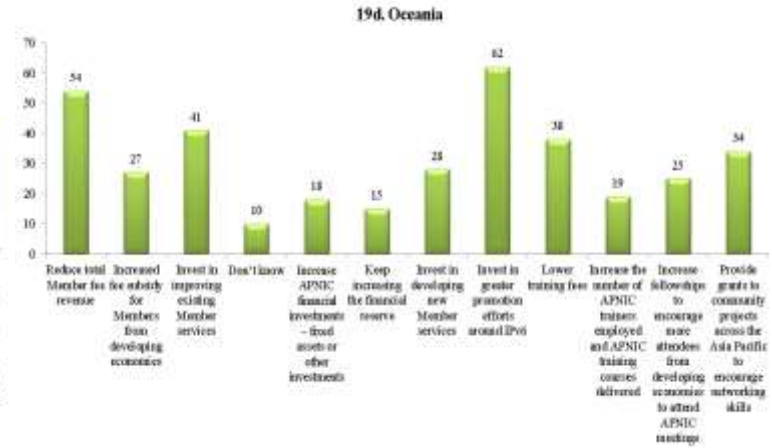
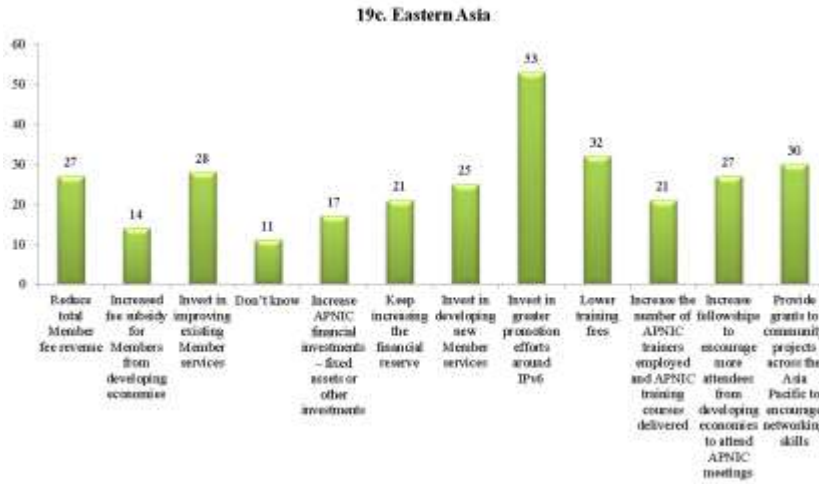
**A19a. Members who have interacted with APNIC 1-5 times in the past two years vs think APNIC should use its surplus fund on the following if it exceeds its financial reserve target**



**A19b. Members who have interacted with APNIC 6 times and more in the past two years think APNIC should use its surplus fund on the following if it exceeds its financial reserve target**

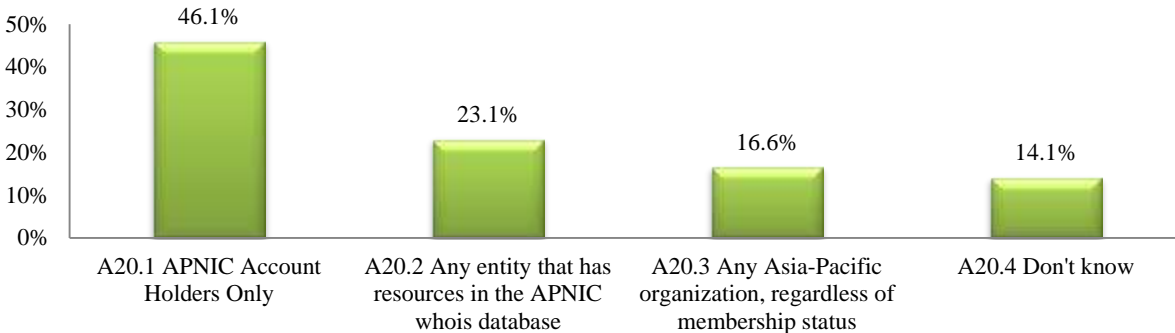


There was no difference in priorities between those who used APNIC services 1-5 times in the last two years versus those used services 6 times or more: IPv6 and lower training fees were still the top two priorities. Those who used APNIC services 6 times or more placed a higher priority on providing grants to community projects and increasing fellowships.



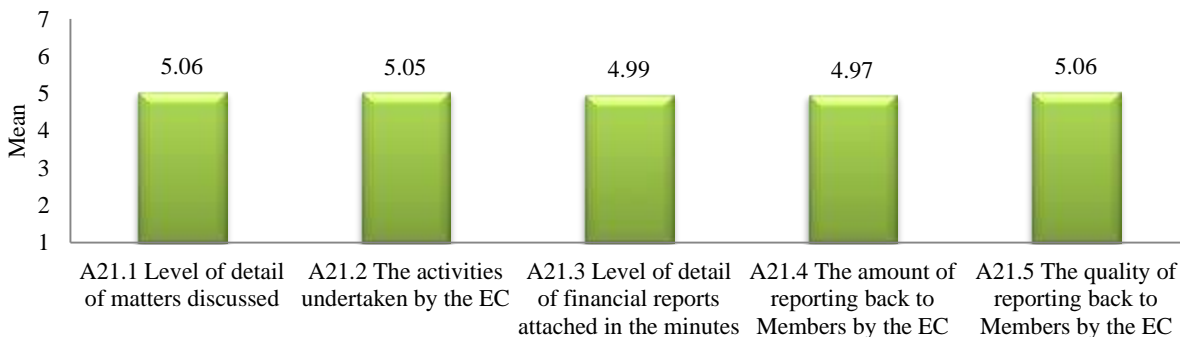
Further analysis also uncovered some regional differences. Promotion of IPv6 remained the top priority in Oceania and Eastern Asia, but “Lower Training Fees” was the top priority in Southeast Asia and Southern Asia. Fellowships (third-highest in Southern Asia, fifth-highest overall) and Community Grants (fourth-highest in Southern Asia, third-highest overall) were also key priorities for respondents from Southern Asia.

**A20. Should services, which are developed by APNIC using Member funding (such as RPKI), be made available free of charge to:**



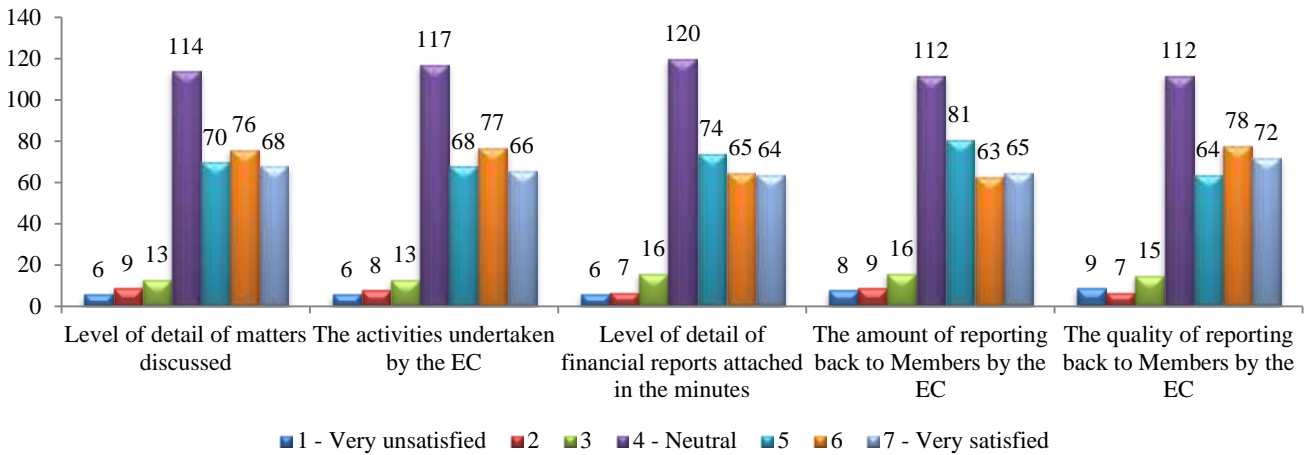
Almost half (46.1%) of respondents, especially those from developing economies, felt that APNIC services developed with member funding should be free of charge to APNIC account holders. Extending it to entities in the APNIC Whois database found support from a quarter of respondents (23.1%); some 16.6% felt that the net should be cast wider, with any Asia-Pacific organisation regardless of membership. While developing economies respondents formed the biggest cohort in support of free services suggested above, they were also the biggest group who answered “Don’t know” (55%).

**A21. Your satisfactory with the transparency of EC meetings and decisions in:**



There were broad levels of satisfaction with the transparency of EC meetings and decisions in the quality of reporting (5.06), level of detail (5.06), activities (5.05), finances (4.99) and

member report-backs (4.97). Developing and LDEs were significantly more satisfied, were significantly satisfied, reporting average ratings of 5.0 to 5.2 for all answer options.

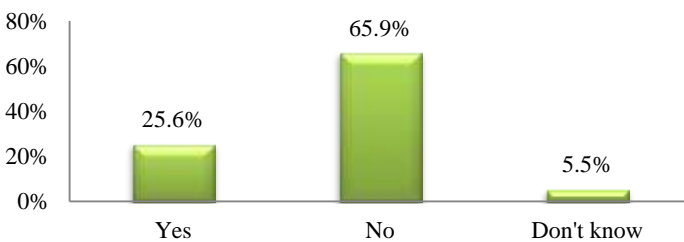


It is also worth noting that around 30% of respondents’ answers were “Neutral (rating 4/7)” for this question. Although around 60% of the respondents rated the items positively, each option also had almost two “Don’t Know” responses (an average of 684) for each actual rating (average of 355..

Technically, “Don’t Know” responses have too many possible meanings behind them to be interpreted. For example, a handful of respondents from the developed economies who provided comments said that they have yet to read any of the minutes online and encouraged transparency of these meetings and decisions.

Two respondents from the LDEs (Bhutan and Cambodia) suggested new faces be appointed to the EC.

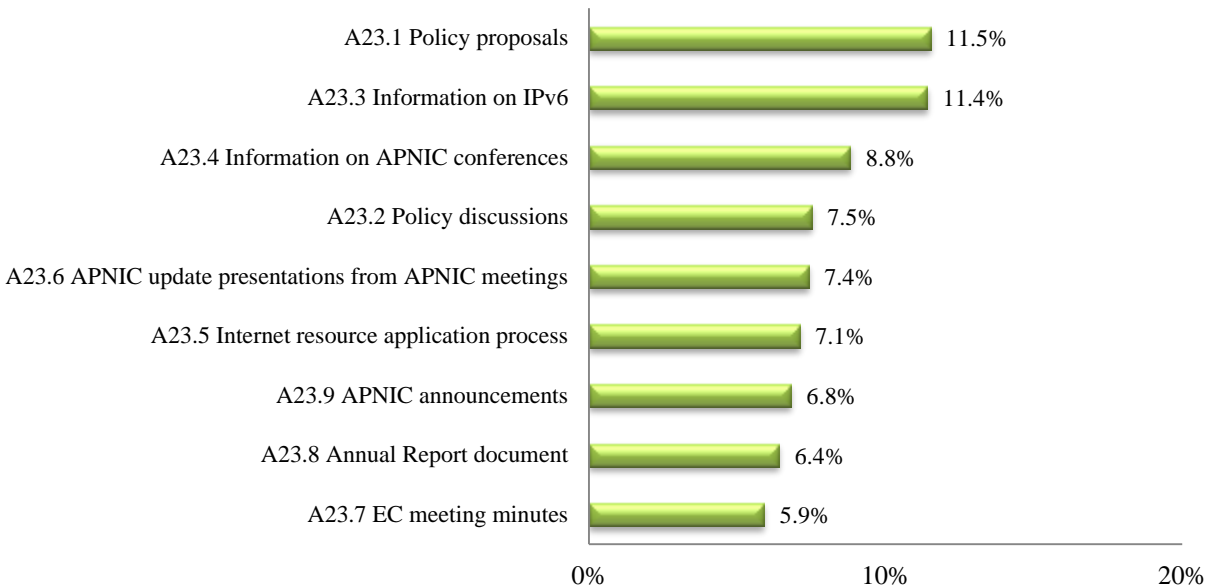
**A22. Do you think that the use of English language poses a barrier to your ability to participate in APNIC discussions**



Most respondents felt that English language posed no barrier to their ability to participate in APNIC discussions. Nearly half of these respondents were from developing economies. Close to 2/3 of respondents (68.3%) who felt English language was a barrier were from developing economies.

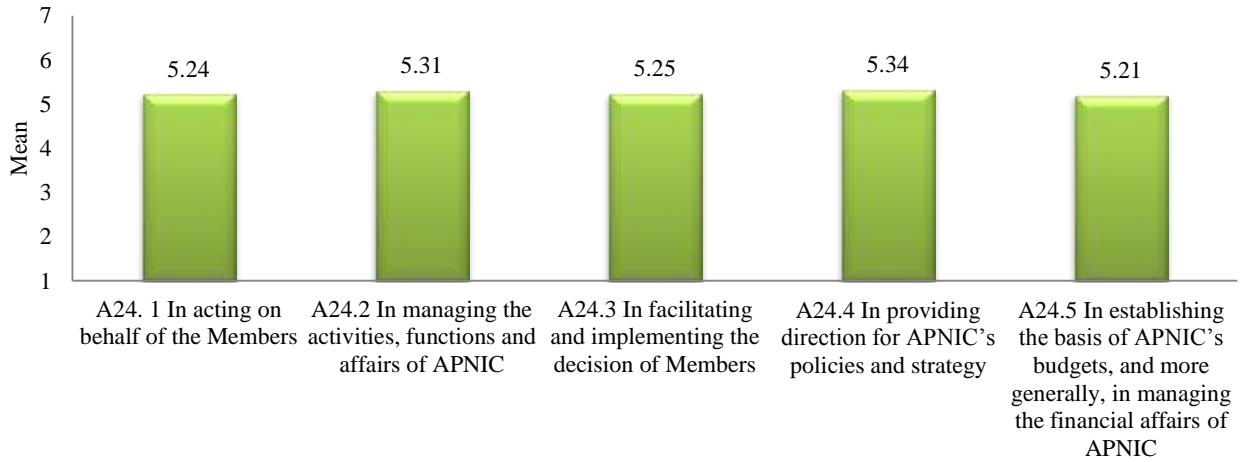
In the 20 comments provided, respondents from countries where English was not the native or predominant language, such as Bangladesh, China and Lao People’s Democratic Republic commented that English did pose a barrier. Others commented that as English was the dominant language on the Internet, some level of English was almost essential when working in this field.

**A23. Communications from APNIC would be MOST beneficial to you if they were translated into your local language:**



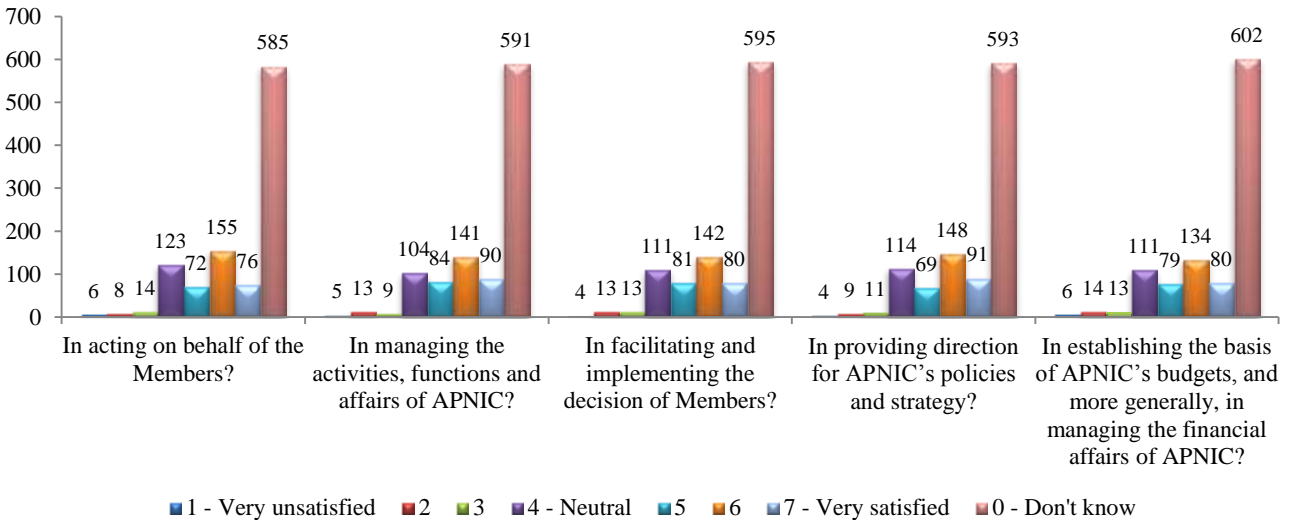
In this question where respondents could pick as many options as desired, the most prominent areas for translation were APNIC policy proposals and information on IPv6, although at 11.5% it was a minority of the total. It is worth noting that no respondent from a developed economy felt a need to translate information on APNIC conferences to the local language.

**A24. Your satisfaction with the APNIC EC fulfilling its roles and responsibilities:**



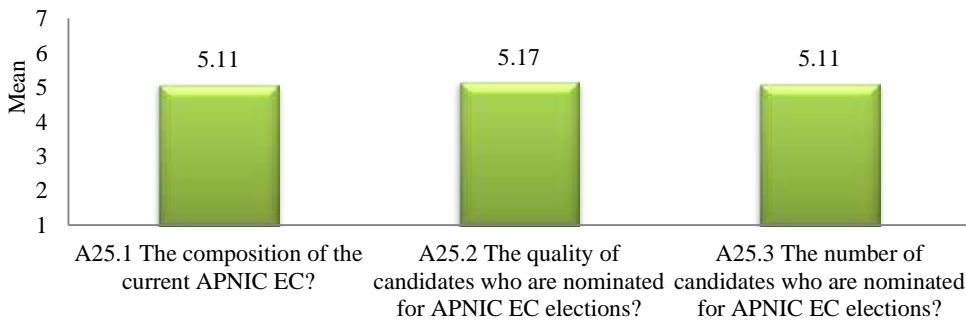
Respondents expressed satisfaction with most of the EC's roles and responsibilities with satisfaction levels above 5 for all questions. Some 69.1% rated positively the EC's roles and responsibilities in providing direction for APNIC's policies and strategy, with 20.4% rating very satisfied (7/7).

No significant trend or difference was noticeable between economies or groups,.

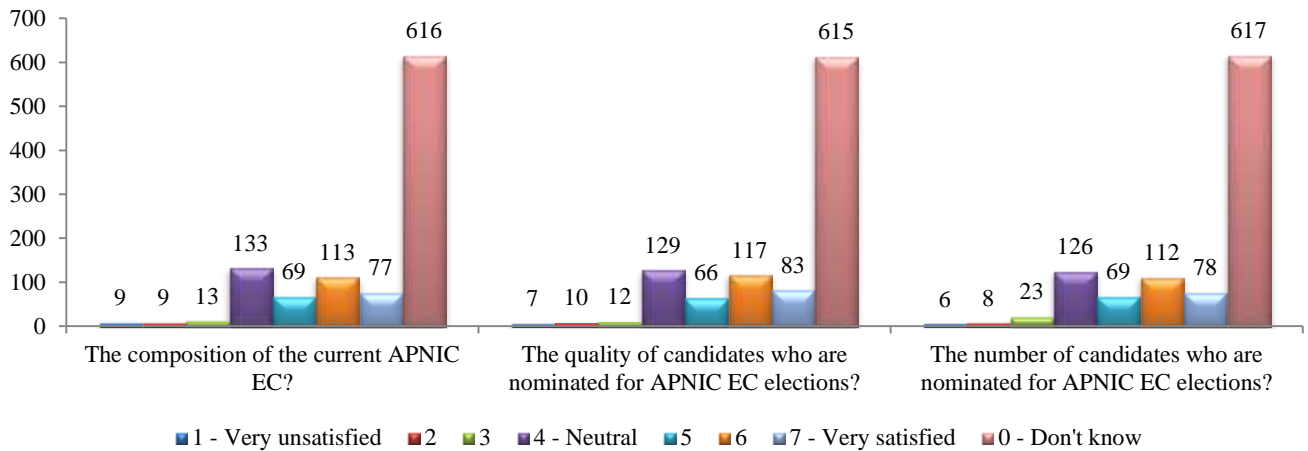


There was, however, a high level of “Don't Know” responses, averaging 593 compared with 446 actual ratings. As observed earlier, such responses should be interpreted cautiously, if at all.

**A25. The composition of the APNIC EC is determined by the rules set out in the APNIC by-laws. How satisfied are you with:**



Respondents from developing and LDEs were significantly more satisfied with the number and composition of the current APNIC EC. Developing economies, in particular, were more satisfied with the composition (5.22) than developed economies (4.74).



This question also had a significant number of “Don’t Know” responses (an average of 616 “Don’t Know” for each answer option, dwarfing the number of all other responses).



## Written Feedback to Survey Questions Q26 and Q27

The second last question asked for any remaining comments on APNIC's oversight, accountability or transparency. More transparency was requested for travel expenses and staff travel fees in the comments. Business class travel was of "no benefit to members", noted one respondent from Brunei and a "waste of money", according to one from Laos, while an Indian respondent added that "APNIC was not a charity organisation to spend on luxury travel." A respondent from Nepal suggested that APNIC could help create a "knowledge sharing platform" that would help increase its effectiveness with oversight and transparency.

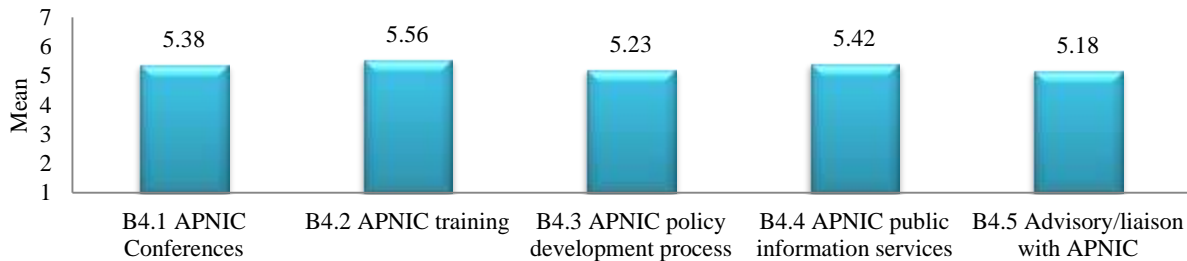
Account holders who responded to the survey also provided the following feedback and/or suggestions (country of respondent origin noted in brackets). The responses are provided verbatim:

- APNIC should spend copious effort to ensure that being able to support IETF and other initiatives that improve value from Internet services is a priority. One of the main drivers in recent times is online safety. (Australia)
- RIRs take a best-of-breed approach and consolidate some platforms to enable the delivery of services worldwide to be more consistent and allow APNIC to reduce its fees by having fewer systems to develop and support. Fees in AP are significantly more expensive for small providers than in other regions. (Australia)
- APNIC should discuss with Bangladesh Government to reduce the cost of internet uses through mobile operators. (Bangladesh)
- On-site and Internet resources training with reduced fees. (Bangladesh)
- APNIC to provide more hands-on workshop on IPv6. (Brunei; Cambodia)
- APNIC should balance between the ISP or Telecom who are holding the huge Public IP resource and for some only holding a very little resource. (Cambodia)
- New EC from the developing economics. Refresh EC to give new fresh idea. (Indonesia)
- Survey to evaluate director general performance by members. (Lao People's Democratic Republic)
- Billing: allow 2 months (currently 1 month) for member to process membership payment – i.e. sent out payment notice 2 months ahead of expiration. (Taiwan)

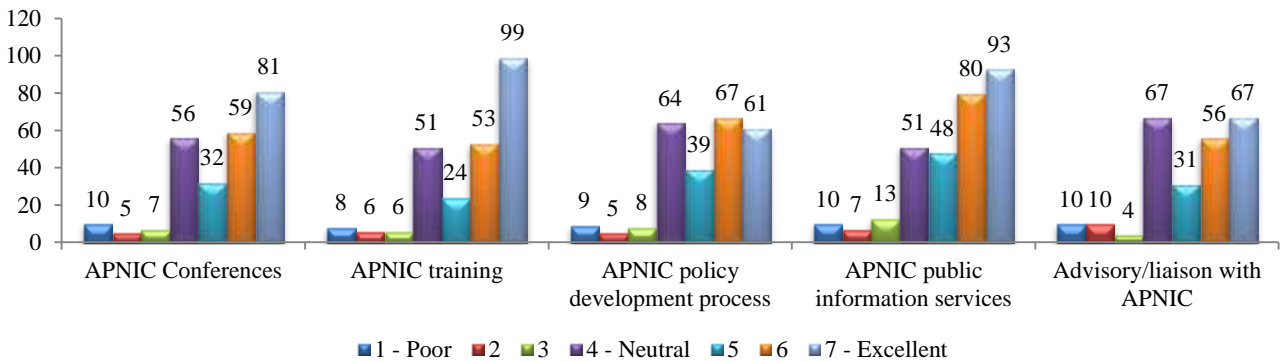


**Section B: For all APNIC Stakeholders (Others)**

**B4. Thinking of your interactions with APNIC, you would rate:**



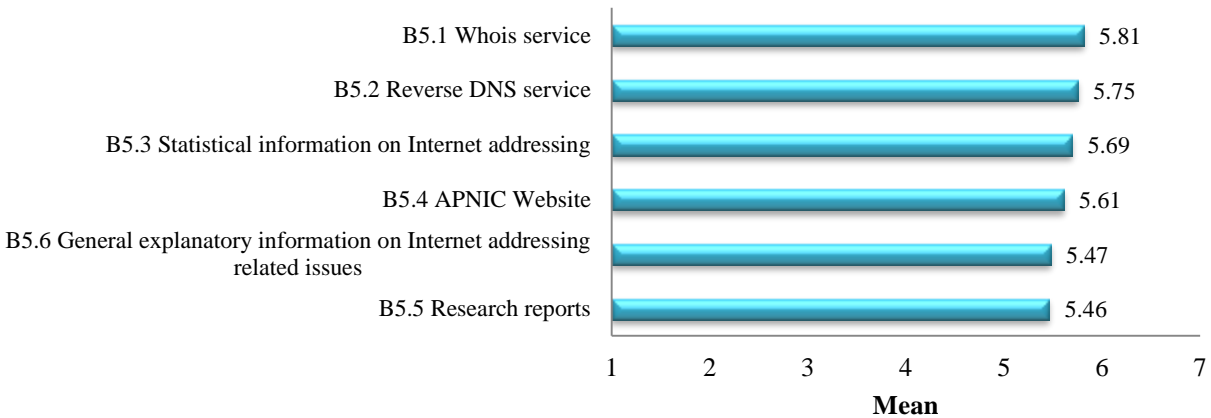
Respondents rated their interactions with APNIC favourably. Overall, APNIC training was the highest rated (5.56), followed by public information services (5.42) and conferences (5.38). Respondents from LDEs gave significantly higher ratings to APNIC conferences (6.33), training (6.59) and the policy development process (5.97).



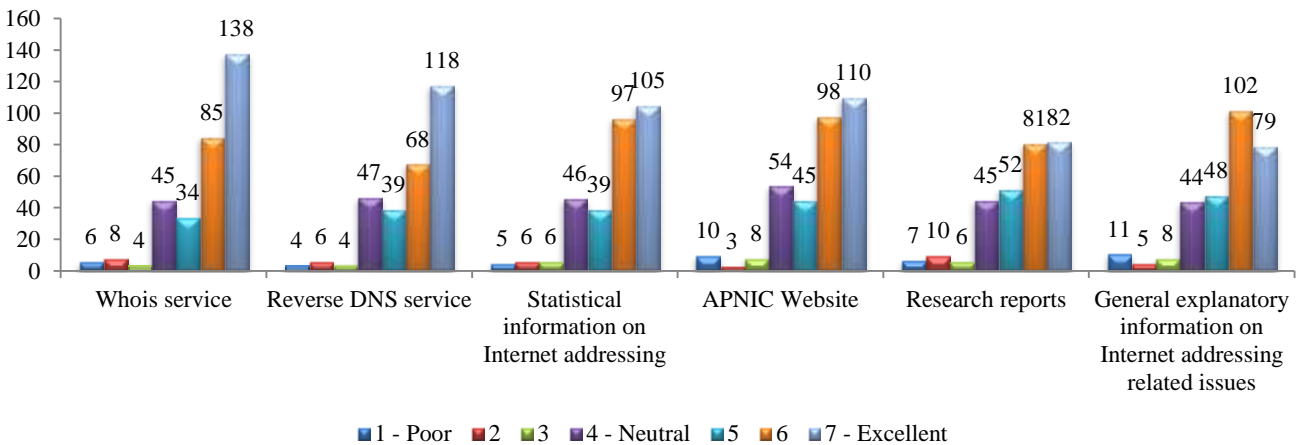
Some 40.1% of the respondents gave training 7/7 while 30.8% and 32.4% rated public information services and conference 7/7 respectively. The percentage of respondents who rated these positively was 71.3% for training, 73.2% for public information services, and 68.8% for conferences.

Respondents from LDEs also rated their liaison/advisory interactions with APNIC significantly higher than developed economies (5.74 vs 4.65).

**B5. Your assessment on APNIC's public information resources and services:**



Satisfaction with APNIC’s public information resources and services rated very high. The Whois service rated highest (5.81) with a total of 80.3% rating it positively. Almost half (43.1%) of the respondents gave it 7/7, with a low 5.7% rating it negatively. Respondents from developed economies gave it a lower rating, at 5.42.



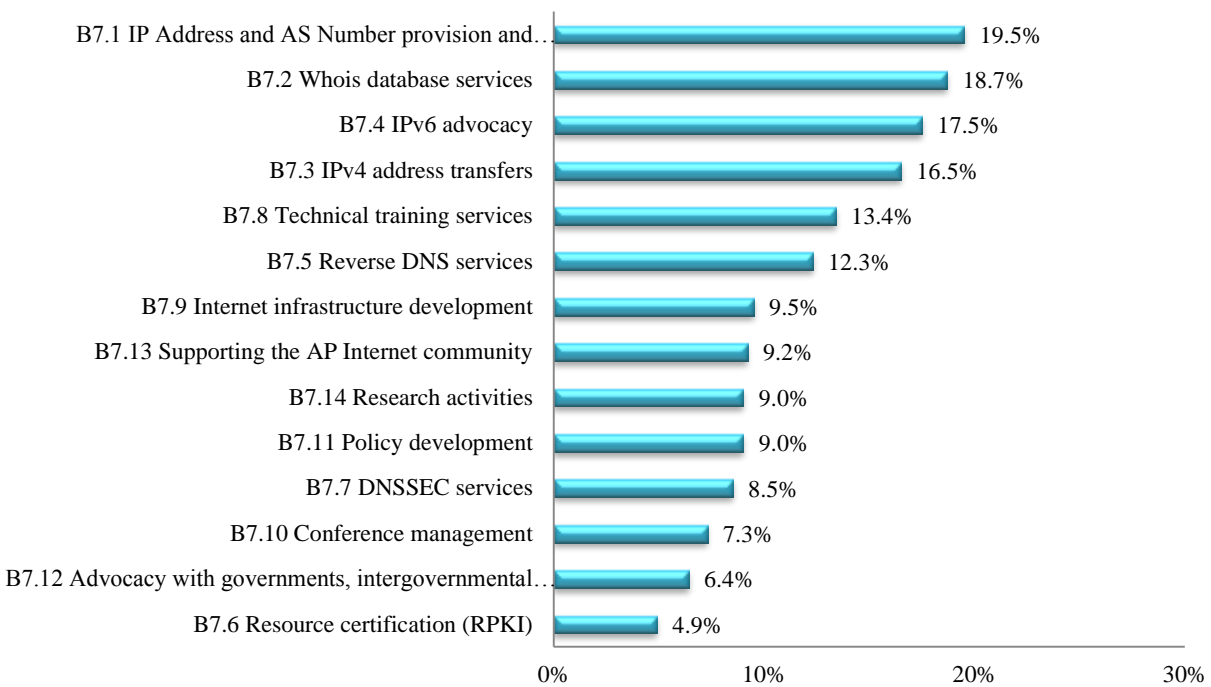
Respondents from LDEs gave significantly higher scores in a few areas: APNIC’s reverse DNS service (6.41 vs overall mean of 5.75), statistical information on Internet addressing (6.39 versus overall mean of 5.69), and the general explanatory information on Internet addressing (6.05 versus overall mean of 5.47).

In the comments section, a few respondents suggested other useful services that APNIC could provide included more detail on IP address information, such as showing if it is a mobile network allocated or business/residential. Another commenter requested a comprehensive listing

of blacklisted IP Addresses & Domains. On the non-technical side, a few requested past APNIC conference and training material, and for materials to be available in the Chinese language.

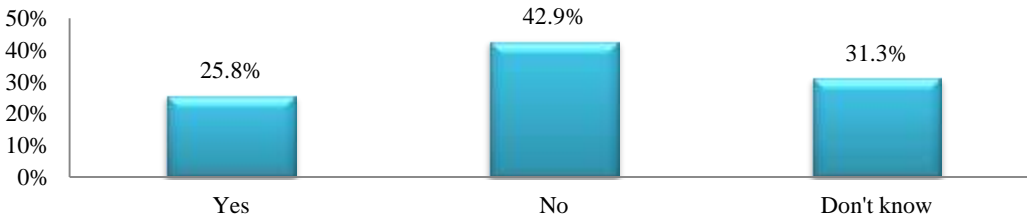
Suggestions for additional information services that APNIC could provide were many and diverse, from IPv6 and more training to conferences and data reports. At least four Indonesian respondents requested more advanced Whois services. Two respondents, from Papua New Guinea and Vanuatu, asked for Internet statistics specific to small economies in the Pacific Islands. Some Chinese respondents requested Reverse DNS functionality.

**B7. From your knowledge of APNIC, activities you would most commonly associate with APNIC:**



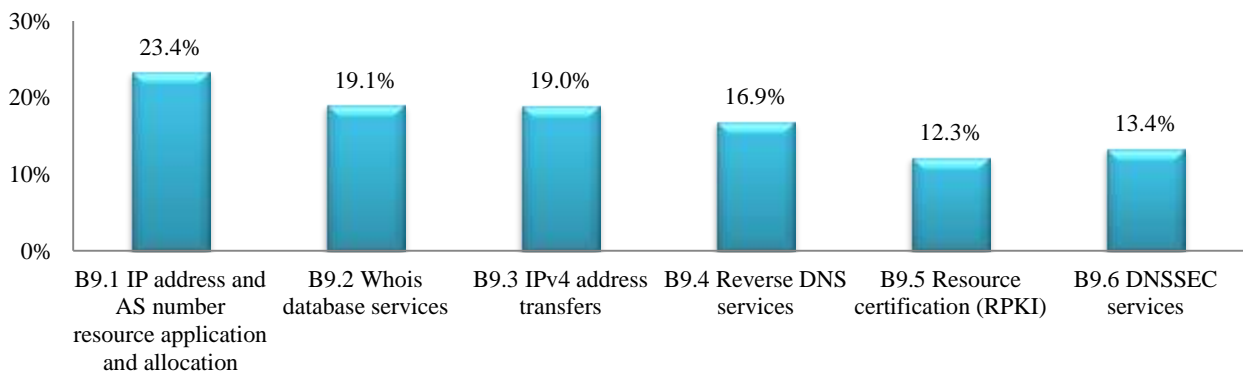
Most respondents associated APNIC with its core technical competencies – IP address and AS number provision (19.5%), Whois (18.7%) and IPv6 advocacy (17.5%). Non-core activities, such as supporting the AP Internet community (9.2%) and advocacy (6.4%) came in much lower, with none over the 10% mark.

**B8. APNIC’s policy Development Process is open to anyone, whether their organization is a member or not. Does your organization actively participate in APNIC policy development?**



Almost half (42.9%) of respondents said they or their organisations did not participate in APNIC policy development while a quarter (25.8%) said they participated. More than half (57.7%) of those who answered “No” were from developing economies. Among those who answered “Don’t know” (31.3%), most (68.4%) were from developing economies.

**B9. If you were to become an APNIC Member in future, services you would require:**

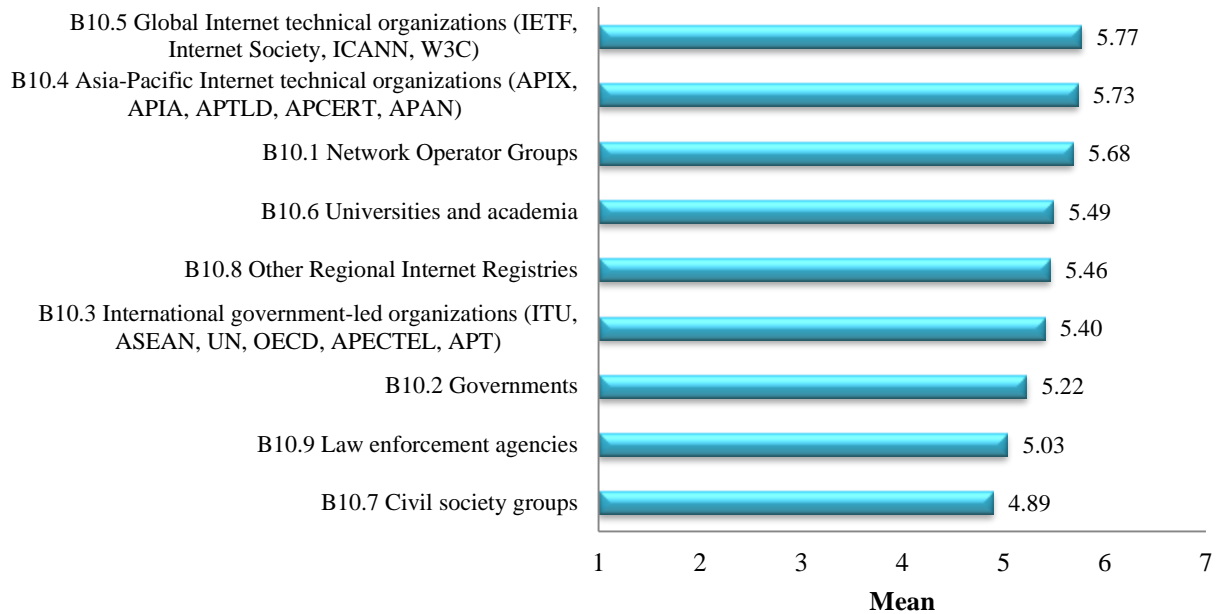


Close to a quarter (23.4%) of non-members felt that IP address and AS number allocation were the critical services of membership. Some 19% felt that the other core services such as Whois and IPv4 address transfers were second and third priority.

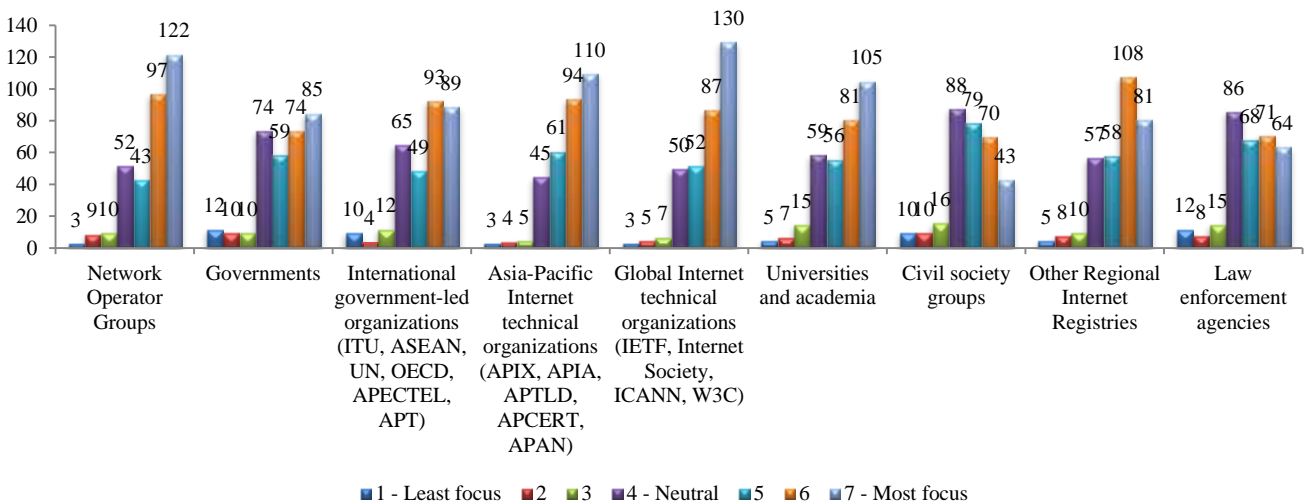
Other services that respondents said they would require include:

- Policy input and technical advice,
- Research and innovation,
- Training, including IPv6, and
- Community services and capacity building projects such as ISIF.

**B10. APNIC should focus its external relations efforts on:**



Most respondents said they believed APNIC should focus its external relations efforts on global internet technical organisations; a view which developed economies expressed more strongly (6.29), but not significantly higher than developing economies (5.71) and LDEs (5.70).

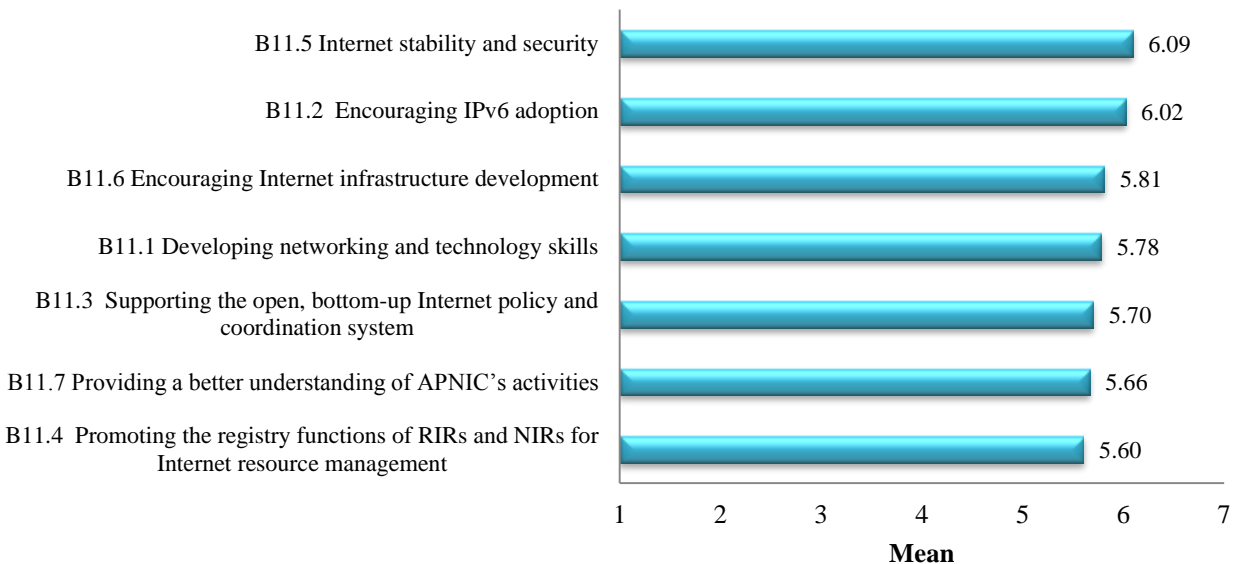


A large proportion (38.9%) of respondents strongly supported (7/7) a focus on external relations effort with global Internet technical organisations. Overall, 80.5% of respondents rated this focus positively with only 4.5% rating it low. Civil society groups should be least focused on,

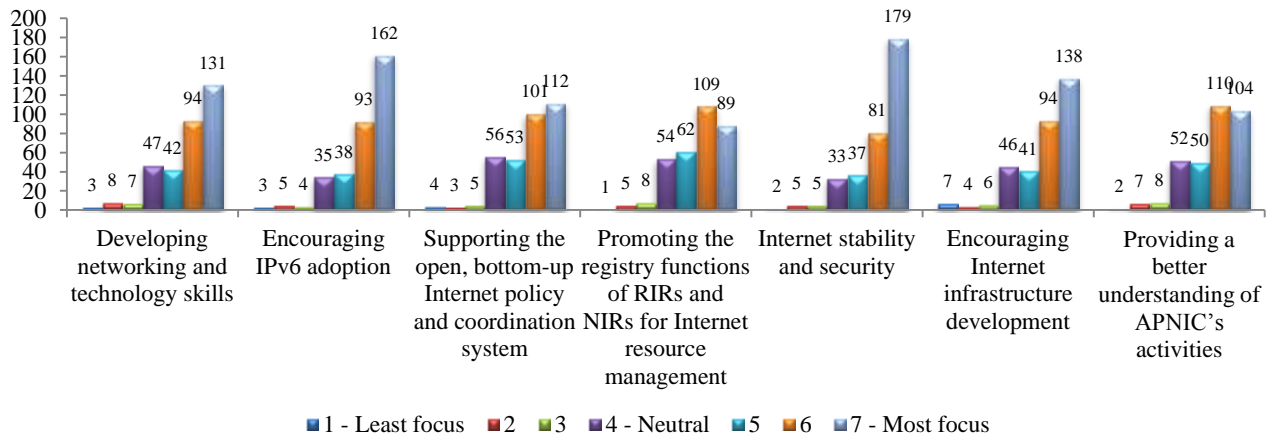
especially for developed economies (mean score of 4.52 versus overall mean of 4.89); some 13.6% of the respondents rated it with the highest rating of 7/7.

Additional comments to this question were split between caution, urging APNIC to stick to its mandate within registry services, and proactive collaboration, urging APNIC to pursue greater engagement with IT security groups, governments and civil society. A few respondents noted concerns with issues of data security and privacy that might arise out of collaborations with governments.

**B11. Topics that APNIC should focus its efforts with these various stakeholders:**

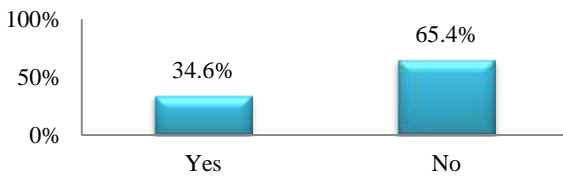


Most respondents felt that Internet stability and security (overall mean 6.09), and IPv6 adoption (6.02 overall) were topics that APNIC should focus on with stakeholders, mirroring the results from APNIC account holders. Some 52.3% and 47.6% of respondents rated them 7/7 respectively. Internet stability was a particularly strong preference for respondents from LDEs (6.66 versus overall mean of 6.09). While promoting registry functions of RIRs and NIRs were lowest priority overall, with a mean of 5.60, respondents from LDEs rated it significantly higher, at 6.25.



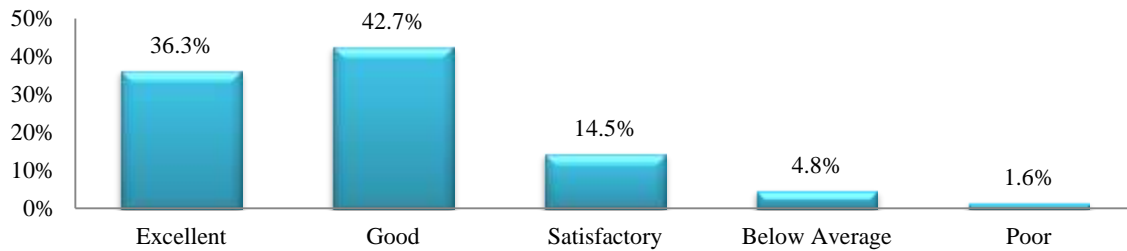
Most respondents who provided written comments believed that APNIC’s efforts were sufficient, or good. One respondent from Papua New Guinea commented that it might be prudent for APNIC to “push for domain name registers to be more innovative in helping customers register domain names especially in the Pacific.”

**B12. Have you contacted APNIC with a query in the past two years?**



Only a third (34.6%) of the respondents had contacted APNIC with a query in the past two years a minority. Of the remainder two-thirds (65.4%) who had not, most (68.5%) were from developing economies.

**B13. How would you rate your experience on how your query was handled?**



More than three quarters of respondents (79%) said APNIC’s handling of queries was “good” to “excellent”. Some 42.7% of respondents said that APNIC’s handling of queries was “good”; 71.7% of them were from the developing economies.

Around 20% of members gave this process an average or below-average rating, with two respondents – one from the United States and one from Indonesia totaling 1.6% of respondents – rating it “poor.”

**Written Feedback to Survey Question B14:**

When asked for additional comments, two respondents from North America noted problems with spam. “Most IP Addresses coming from APNIC hammer my servers with everything from SPAM to website/webserver hacking,” noted one respondent from Canada. “I rarely get responses from the abuse@ emails I send to and it takes longer to figure out the network range of an attack by your limited Whois information. So, it's easier to filter entire netblocks, which I do.” Another US-based user was more critical: “Nothing but spam and fake addresses. Your invalid contact form takes forever to submit and nothing is ever done about the myriad of invalid addresses I have reported.”



## 4. Key Issues

A major purpose of the biennial Survey is to evaluate the performance of APNIC and to gather inputs on how APNIC can improve the existing services. These key issues have been selected as issues to be considered for possible action by the APNIC in improving services as well as strategic planning.

The very good news is that the quality of APNIC services is rated very high practically across the board, with an increase in satisfaction levels reported over the 2012 survey. Members also report improvements in many areas over the previous year.

1. APNIC Account Holders were generally satisfied with the services provided by APNIC, and are in general agreement that APNIC basic services have improved over the years, hostmasters were doing a good job and turn-around times for requests were prompt. The satisfaction level is now 6.15 on a 7-point scale. Expressed as a percentage, that is a 87.9% satisfaction level. In the service industry generally, anything above the 70% mark (4.9 on a 7-point scale) would be deemed good whereas in this survey, anything touching 4.9 bears watching. As expressed in one comment: When you approach the top, getting better is harder. It will be increasingly difficult to maintain the high level of service for APNIC and especially with increasing demands for a diverse range of services. .
2. There were some changes in members priorities. Training moved up from 5<sup>th</sup> to 2<sup>rd</sup> place in priority. APNIC's external relations and conference coordination also moved up in priority, from 11<sup>th</sup> and 13<sup>th</sup> on the 2012 survey to 8<sup>th</sup> and 9<sup>th</sup> in 2014.
3. The membership quite clearly see themselves as being in a technical field. They would prefer that APNIC strengthen its relationship with technical organisations such as NOGs, international bodies such as the IETF and then at the bottom of the list of preferences, governments, law enforcement agencies, and civil society groups. This is ironic because in Internet governance discussions, the technical community has been lumped with civil society groups; further, there is an increased acceptance of the multistakeholder model in Internet governance where government, business and the civil society (including the technical community) must be brought together for any discussion on governance to be fruitful.
4. Contrary, perhaps, to perceptions of being only self-interested, members were divided between serving the community (first) and their own interests in the use of surplus funds. The first six uses alternated between the funds being used to serve the community and to be used on helping themselves.
5. Almost two-thirds of members who responded felt that the English language was not a barrier to their participation in APNIC discussions. But a sizeable minority of a quarter—mostly from countries where English is not a native language—felt that it was.

6. While there was broad satisfaction with the workings, composition and transparency of the EC, the satisfaction ratings for the level of detail of financial reports attached to the minutes (4.99) and the amount of reporting back to members by the EC (4.97) were among the lower ratings in the Survey. (On a related note, the lowest rating of 5.09 was for the Secretariat's reporting on financial information, expenditure and investments.) Respondents from LDEs and developing economies said they wished for more oversight on issues such as business-class travel and responses to requests for information. Respondents from developed economies, on the other hand, while supportive of current transparency guidelines, questioned the processes even as they admitted that they had not analysed the processes too closely. Three EC-related questions also had a significant number of "Don't Know" responses, in two cases dwarfing the number of all other responses combined.
7. There were a handful of responses saying that the MyAPNIC site and interface were difficult to use and need to be relooked.

## 5. Conclusion

Overall, satisfaction increased from the 2012 Survey. Account holders, especially from developing and LDEs, were most satisfied with how APNIC is run, and placed high value on its service quality and delivery.

There were broad levels of satisfaction with the workings, composition, and reporting activities of the EC. There were many respondents who expressed a lack of knowledge about specific issues, through comments and/or "Don't know" responses?" suggesting opportunities for engagement with the members. Members also wanted more details and more reports from the EC especially on financial details.

Respondents also made what might be expected as the customary call for more rollout of new services.

The 2014 Survey is an overhaul in questions and structure from the previous surveys. The number of respondents declined principally because of smaller turnout of respondents from the three large economies of China, India and Indonesia. This decline, however, was cushioned through the greater use of social media for outreach. The use of such media may be the opportunity for engagement in the future.