APNIC
2022 Member & Stakeholder Survey Results
Methodology
Consultations

<table>
<thead>
<tr>
<th>2022 Interview Locations</th>
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<tbody>
<tr>
<td>Australia</td>
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<tr>
<td>Bangladesh</td>
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<td>Bhutan</td>
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<td>Cambodia</td>
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<td>China</td>
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<td>Fiji</td>
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<td>Hong Kong Special Administrative Region of China</td>
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<td>India</td>
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<td>Indonesia</td>
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<td>Japan</td>
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<td>Kiribati</td>
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<td>Malaysia</td>
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<td>Mongolia</td>
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Key Interview Findings

- A total of 37 IDIs were conducted spanning 25 economies.
- A majority of the interviews were conducted with APNIC Members or Account Holders
- Six conducted with Stakeholders within the region
- All seven of the APNIC NIR Members were consulted

- COVID-19 affected demand, supply chains and workforce
- Internet security, and deploying IPv6 were the major challenges mentioned
- Online meetings, training, conferences, and other forums are no substitute for the “real thing”
- APNIC is consistently described as being highly regarded, trusted, reliable, and professional
- Equal access to the Internet for small and LDEs, and educating the ‘next generation’ about the Internet are important issues
# Quantitative Sample

<table>
<thead>
<tr>
<th>Region</th>
<th>Count</th>
<th>%</th>
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<tbody>
<tr>
<td>East Asia</td>
<td>269</td>
<td>17%</td>
</tr>
<tr>
<td>Oceania</td>
<td>275</td>
<td>17%</td>
</tr>
<tr>
<td>South East Asia</td>
<td>454</td>
<td>28%</td>
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<tr>
<td>South Asia</td>
<td>486</td>
<td>30%</td>
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<tr>
<td>Non-APNIC Region</td>
<td>137</td>
<td>8%</td>
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<tr>
<td><strong>Total</strong></td>
<td>1,621</td>
<td>100%</td>
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- **Gender**
  - Male: 85%
  - Female: 12%
  - Other: 3%
  - Prefer not to say: 3%

- **Membership Status**
  - APNIC Member: 65%
  - Member of NIR in APNIC Region: 19%
  - Other Stakeholder: 15%
  - Have never completed the APNIC Survey before: 61%
Key Findings
Members’ ratings of the quality and value of APNIC services and membership have improved

COVID-19 has had a significant impact on organizations, although confidence about the future is high

Despite lower usage of almost all APNIC’s services, satisfaction with these has been maintained

Increased security-focused training courses, collaboration with others, and maintaining a security threat intelligence sharing service are the best ways APNIC can assist

Lack of skilled Internet engineers and Internet security are the biggest challenges

Investment in infrastructure and human resource capacity building are the priority areas for Internet development in the region
Results
Service Satisfaction

Quality of services

- **2022**: 5% Very poor, 6% Poor, 34% Below average, 45% Neutral, 54% Above average
- **2020**: 7% Very poor, 9% Poor, 45% Below average, 45% Neutral, 39% Above average
- **2018**: 9% Very poor, 11% Poor, 45% Below average, 35% Neutral, 35% Above average

Value of services

- **2022**: 5% Very poor, 7% Poor, 33% Below average, 43% Neutral, 54% Above average
- **2020**: 8% Very poor, 8% Poor, 43% Below average, 40% Neutral, 40% Above average
- **2018**: 8% Very poor, 10% Poor, 43% Below average, 38% Neutral, 38% Above average

Value of membership

- **2022**: 7% Very poor, 6% Poor, 34% Below average, 41% Neutral, 51% Above average
- **2020**: 10% Very poor, 10% Poor, 41% Below average, 39% Neutral, 39% Above average
- **2018**: 10% Very poor, 10% Poor, 39% Below average, 39% Neutral, 39% Above average

Thinking about APNIC overall, how would you rate:

- **Service Satisfaction**
- **Value of services**
- **Value of membership**

Legend:
- Very poor
- Poor
- Below average
- Neutral
- Above average
- Good
- Excellent
Thinking about the impacts of COVID-19, which of the following had the MOST impact on your organisation?

- Inability to travel
- Managing people working from home
- Supply chain disruptions
- Increased costs to provide services
- Managing customer expectations
- Attracting or retaining employees
- Increased pressure from market competitors

49% of respondents say demand for services increased

30% of respondents say demand for services decreased
Top rated APNIC Services

Despite lower usage across some services due to COVID-19, satisfaction remains high.
Thinking about your Internet-related services, products or activities, what are the MAIN strategic or operational challenges facing your organization? % Ranked 1, 2 or 3

- **Policymakers / regulators’ understanding of the Internet**: 24%
- **Managing unintended consequences of regulations**: 28%
- **Internet security**: 50%
- **Hiring / keeping skilled employees**: 42%
- **Managing costs of systems, n/w operations and security**: 35%
- **Automation of network and systems operations**: 35%
- **Management of Internet traffic, transit and peering, & network capacity**: 31%
How can APNIC help?

Overwhelmingly Members talked about continued provision of training and education as the best form of assistance.

- **Training**: 35% mentioned training, including advanced training in IPv6.
- **Security**: 8% mentioned Internet security training, including how to mitigate against attacks.
- **Case studies**: 11% want case studies, best practice videos and blogs.
- **Awareness**: 6% called for better education / awareness to governments about the Internet.
Internet Development
Priorities for Investment

Investment in internet infrastructure, particularly in backbone networks or undersea cables is important to many.

Technical training for new or emerging network engineers is also important to Members.

Infrastructure Investment
Of those, 46% want to see investment in backbone networks, while 43% prioritise peering, and 37% neutral IXPs

Human Resource Capacity Building
Investment in more technical training for network engineers is the priority for 59% of Members. Others would prefer scholarships or internships at APNIC (38%) or fellowships for the next generation of network engineers (35%)
Conclusion

- In a difficult two years, Members and Stakeholders satisfaction with the quality and value of services remains very high
- Members challenges have become more complex, and will need monitored over time
- Ability to provide QoS management of capacity and bandwidth are issues for many with the increased demand for Internet access
- A lack of skilled IT resources in the region is also problematic
- Continued training, including more advanced training, and hands-on workshops or forums is desired
- Expanding training to include the ‘next generation’ of network engineers will also help