
Mobile Internet Usage Trends in Asia-Pacific

FEBRUARY 2016

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Overview

Mobile broadband networks have in most countries in Asia-Pacific overtaken fixed broadband as the main mode of Internet access, with more than a third of the region's population going online using mobile networks and devices.

Fuelled by a combination of low-cost smartphones, 3G and LTE rollouts, and an abundance of content—particularly applications—from over-the-top providers, mobile is driving Internet adoption in the region, and will continue to do so for at least the next five years.

This bodes well for the region's 4.3 billion people, more than half of whom are offline. Mobile Internet, in particular, holds vast potential in bridging socio-economic gaps, bringing more inclusive development by expanding opportunities for education, business, financial inclusion, and public service delivery. But assessing the extent to which this has been realised requires a closer inspection of mobile Internet uptake in Asia-Pacific.

Beneath the region's 42% mobile broadband penetration lies vast discrepancies: In advanced economies like South Korea, Australia, Taiwan and Hong Kong, this figure shoots up to more than 100%, but drops down to less than 10% in Papua New Guinea, Nepal and Timor Leste. Asia-Pacific's average cellular speed, at 10.9Mbps, belies an uneven spread of 13Mbps or more for countries like Singapore and Japan, and 3Mbps for Bangladesh and Laos.

Highlights



90%

Access the Internet through their mobile device everyday



72%

Prepaid subscription is highest among respondents between 15-24 years old



Mobile Internet in Asia-Pacific is predominantly used for email, information and social media

The average smartphone connection in Asia-Pacific now uses around 1Gb of data per month but huge differences prevail: While an average mobile user in Singapore or Japan would consume 1.5 to 2Gb of mobile data per month, their counterparts in China and the Philippines use more than a fifth less, at 200-300Mb. One of the biggest barriers is affordability: Broadband access in developing economies, including landlocked countries in Asia and small island states in the Pacific can be up to 18% of monthly average gross national income, far higher than the ITU/UNESCO Broadband Commission target of 5%.

Amidst this landscape of great contrasts and potential, the Internet Society Mobile Internet Usage in Asia-Pacific study sought to capture mobile users' online habits to provide insight on its current state and evolution. Conducted online in September 2015 using the Survey Monkey platform, the survey had 1,620 respondents across 37 economies. Analysis of the survey finds a segmented market whose behaviour largely corresponds with regional projections, but whose growth requires further cultivation, through forward-looking measures and policies, to ensure that the mobile Internet remains a truly transformative force for the region's economies, and for its people.



80%

Have a mobile device that uses Android as its operating system



72%

Prefer to use Wi-Fi over a data connection when accessing the Internet on their mobile device



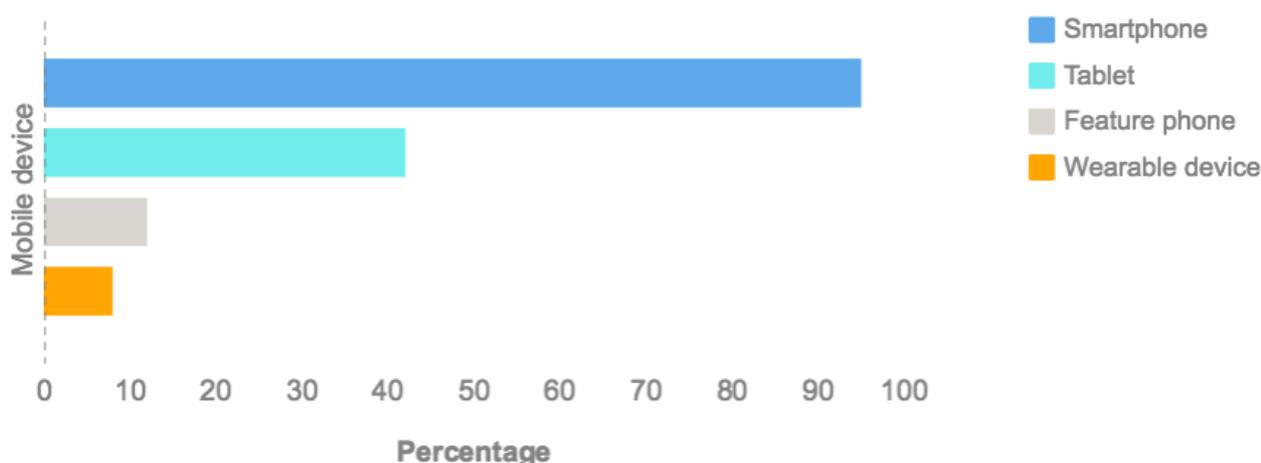
Cheaper and faster connection would make respondents use their mobile data connection more often

A. Devices and Subscription

Smartphones continue to be the mobile device of choice for Internet users in Asia-Pacific. Across all age groups in the survey, smartphone ownership does not go below 94% (45-59 year olds), peaking at 96% among 15-24 year olds.

The trend is reversed for other mobile devices. Averaging at 43% and 8% respectively, both tablet and wearable device ownership are lowest among younger respondents: Just over a quarter (29%) of 15-24 year olds have a tablet, and less than 4% have a wearable Internet device. By contrast, tablets are twice as common among 45-59 year olds at 64%.

Q: Which of the following mobile devices do you have?¹



The same discrepancy exists between economies in Asia-Pacific. Respondents from emerging economies were almost half as likely to own a tablet (36%) or a wearable Internet device (7%) as their cohorts in developed economies.

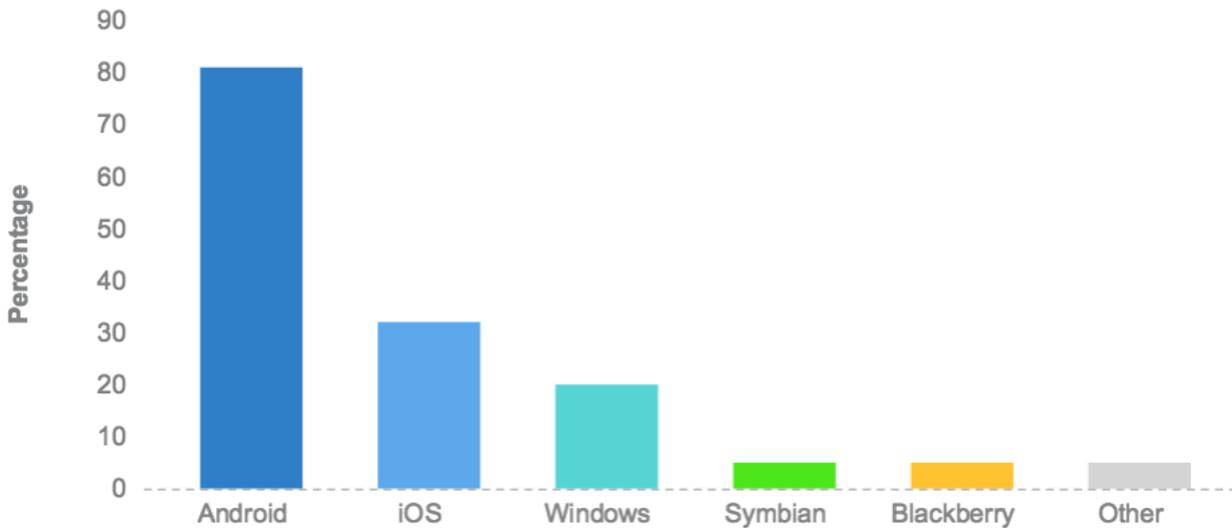
The survey also found that ownership of multiple mobile devices is more likely among those who already have a smartphone: 96% of respondents who had a tablet and 90% of those who had a wearable device also own a smartphone. Owners of wearable devices, in particular, were more likely to have several mobile devices, with three-quarters (75%) also owning a tablet in addition to a smartphone.

Android captures a big chunk of mobile Internet users in the region: 80% of respondents have it as their mobile operating system, mirroring Android's overall worldwide market share (81%).

Apple's operating system iOS, used by less than a third of respondents overall (32%), was more popular among older age groups, and with those from developed economies, where it was used by more than half (58%) of respondents. iOS was much less prevalent in emerging economies (28%), particularly in the South Asian region (23%), and more than half of those who use it (62%) also use another operating system for one of their mobile devices.

¹ Multiple answers were allowed

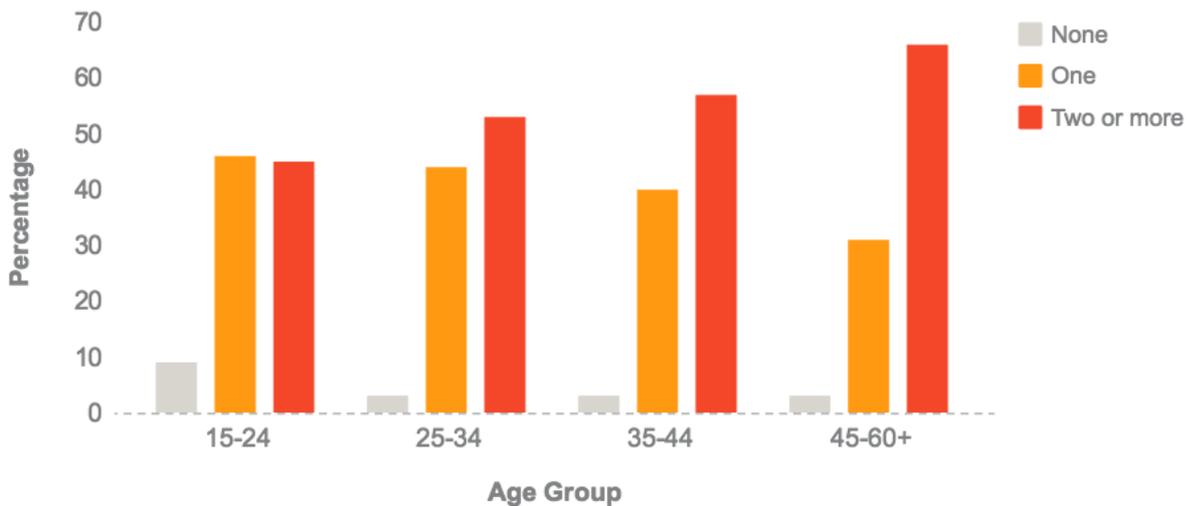
Q: Which operating system(s) are you using on your mobile device(s)?²



Survey respondents are almost equally split between those who have a prepaid (47%) and a postpaid (48%) mobile subscription, with the remaining 5% stating that they do not have a mobile plan.

Prepaid subscription is highest (72%) among respondents between 15-24 years old—inversely, postpaid plans become more prevalent the older the age group, going up to 67% among those 45 years old or above. The latter is also dominant among tablet and wearable device owners (57%), and respondents from developed economies (72%).

Q: How many mobile subscriptions do you have?

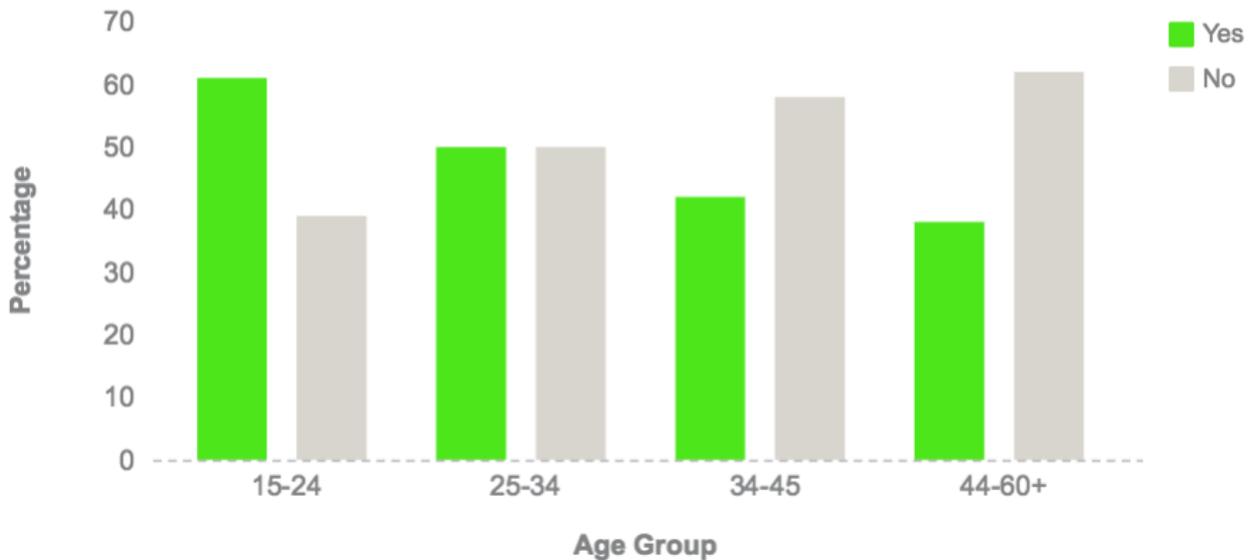


² Multiple answers were allowed

B. Frequency and Patterns of Use

More and more people in Asia-Pacific are expected to access the Internet on their mobile device. Evidence to support this is emerging in certain market segments. Overall, 47% of those surveyed use a mobile device as their primary means of going online. This figure is higher among respondents below 25 years old (61%), and those who live in Southeast Asia (52%), and much lower among those who live in developed economies in the region (38%).

Q: Is your mobile device your primary means of accessing the Internet?

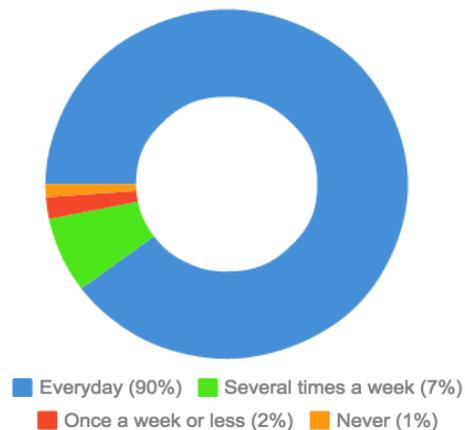


Regardless of its preponderance, the mobile Internet is becoming a familiar presence in people's daily lives. Ninety seven percent of those surveyed access the Internet through their mobile device regularly, with 90% doing so everyday, and 7% several times a week. Only 2.5% of respondents use the Internet on their mobile device less than twice a week.

Everyday mobile Internet usage is higher among tablet owners (95%) and those who owned wearable devices (96%), as well as those from advanced economies (95%).

It is worth noting however that 88% of those who go online less than twice a week on their mobile devices also did not have mobile as their primary Internet access device, suggesting that respondents who use mobile Internet infrequently may be going online through other means.

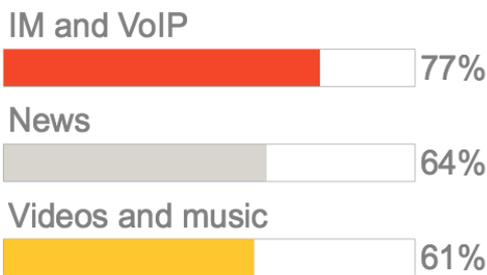
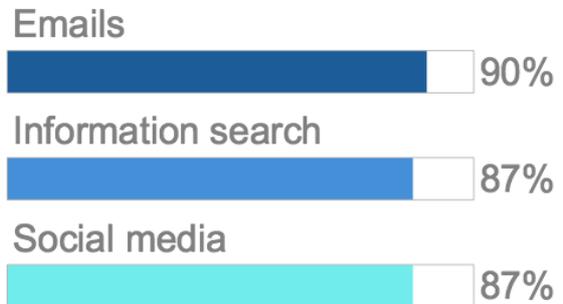
Q: How often do you access the Internet through your mobile device?



C. Activities

Mobile Internet in Asia-Pacific continues to be used predominantly for information and communication. Some 90% of respondents use their mobile device to send and receive e-mails, while 87% use it to search for information online, and for social networking.

These activities hold the top three spots across all age groups and sub-regions surveyed, with some slight variations. Social networking, for instance, drops in priority with the respondent's age, ranking first among 15-24 year olds (92%), second among 25-44 year olds (87%), and third for the 45+ age group (80%).

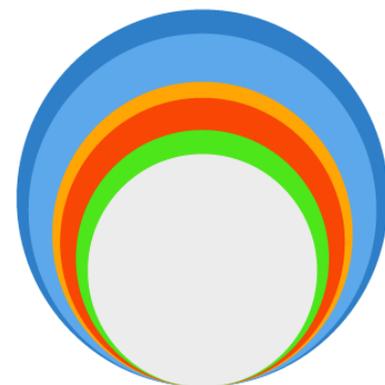


Over three quarters of survey participants (77%) go online with their mobile device to connect with family, friends and colleagues using Internet-based voice and messaging applications, and over half use it for news (64%) and entertainment (61%), including watching videos or listening to music.

A large proportion use their mobile device for online banking and bills payment (49%), and to access e-education materials and e-learning platforms (44%). Over a third also play online games on their mobile device (37%) and buy or sell goods and services (36%). Less than a third use it to access government and social services online (32%), and to look for jobs (29%).

The findings indicate that younger people tend use mobile Internet more than their older cohorts for bandwidth-heavy activities like video and music streaming or downloading, and online games³. Additionally, respondents 24 years old or below were accessing online education platform and materials (61%), as well as job listings (40%), much more than those 45 years old or older (41% and 17%, respectively).

There are other segments that stand out. Those in developed economies tend to use mobile Internet more to search for information (91%), read the news (79%) and access videos and music online (69%).



Job search 29% Government services 32%
Trade goods and services 36% Games 37%
Education 44% Banking and payments 47%

³ Respondents who were between 15-24 years old used mobile Internet more to communicate via IM or VoIP (84%), stream or download music and videos (70%) and play online games (49%). Those 45 years old or above, by contrast, were using IM and VoIP (73%), accessing media files (56%) and playing online games (24%) much less than younger survey participants.

Meanwhile, those who own tablets or wearable devices, as well as those who go online mainly through a mobile device, also registered higher usage—by as much as 13% to 17% more— for all activities, particularly the less common ones: accessing jobs, government and financial services, educational materials, news and entertainment, and trading goods and services online. Conversely, results likewise show that more than half⁴ of those who engage in less popular activities access the Internet predominantly through their mobile device.

This trend applies to a greater degree to respondents who do at least one of these activities, indicating that they are much more likely to use mobile Internet for purposes other than emails, information search and social media. For instance, of those who use the mobile Internet to look for jobs, 75% also access online education materials, banking (70%) and government services 61%), as well as buy or sell goods online (59%).

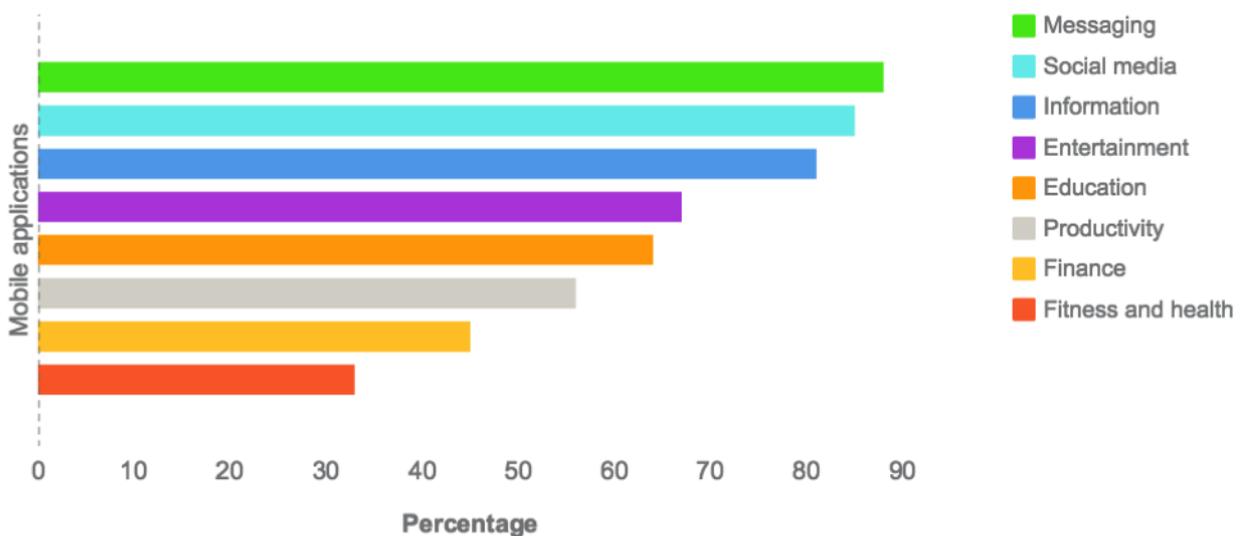
The finding suggests that those with multiple mobile devices, as well as respondents who are either mobile-first, or have switched to mobile as their dominant Internet device, tend to use mobile Internet in more sophisticated and diverse ways than average users.

Beyond the activities cited above, a number of respondents also used their mobile device to create content, including apps and blogs; collaborate on projects online; develop websites; access databases and cloud-based productivity tools; operate systems remotely, and access transportation services.

D. Applications

The usage trends above are matched by users’ app preferences. More than three out of four respondents have downloaded apps on voice calls and messaging (88%); social media (85%); and information, which includes weather, GPS navigation and traffic monitoring apps (81%).

Q: Which applications do you have on your mobile device(s)?



⁴ This includes those who access job listings and government services (65%); purchase or sell goods (61%); access educational materials (59%), banking services (57%), and multimedia content (56%); play games and read the news (54%); and communicate using IM and VoIP apps on their mobile device.

More than half have apps on media and entertainment, including games, music and videos (67%), education (64%), and productivity (56%) on their mobile device. A smaller number have apps related to financial management, including banking and payments (45%), and fitness and health (33%).

App downloads tend to decrease with age: Respondents between 15-24 years old have a higher number of apps on their mobile device, especially those on entertainment (84%) and productivity (67%). But there are exceptions: Apps on information and finance management are slightly more popular with higher age groups, particularly those between 45-59 years old.

When accessing the Internet on their mobile device, the majority of respondents (72%) prefer to use Wi-Fi over a data connection (28%). The preference for Wi-Fi is higher among respondents from emerging economies (77%), and those who use mobile as their secondary Internet device (78%)

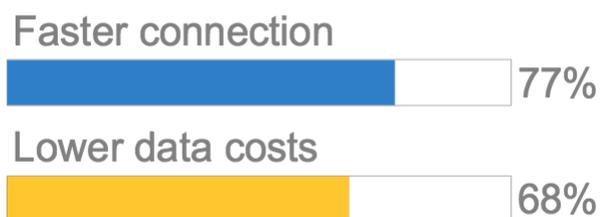
Asked to rate their mobile data connection, a little over half (51%) said they were satisfied (43%) or very satisfied (8%) with their Internet connection speed. Satisfaction was markedly higher among residents of East Asia (73%), and those from developed economies (65%). Meanwhile, dissatisfaction, which averages at 20%, was higher among those who access the Internet on their mobile less than twice a week (29%).

Notably, 68% of those who felt unsatisfied with their mobile data speed also thought it was expensive, and just 17% preferred their data connection over Wi-Fi. Conversely, 59% of those who were satisfied felt that their mobile data subscription was reasonably priced. Relative to their income, only 10% of respondents felt that their the cost of mobile data in their country is cheap--49% felt that it is reasonably priced, with the remaining 41% stating that it was expensive.

The majority of those surveyed stated that faster connection speeds (77%) and lower data costs (68%) would encourage them to use their mobile data connection more often.

Quality of service (QoS) assurance from mobile service providers also merits improvement for 48% of respondents, while over a third noted that the availability of locally relevant content and applications (35%), more robust safety features for mobile connectivity (35%) and lower cost of Internet-capable mobile devices (34%) would increase their mobile data consumption.

Q: What would encourage you to use your mobile data network more often?



Demand for lower data costs were greater among residents of Australia, New Zealand, and the Pacific Islands (87%) and Southeast Asia (75%), as well as more locally relevant content among infrequent mobile Internet users (44%). A higher proportion of those aged 15-24 wanted more QoS assurance (58%) and low-cost or free access to their most frequented websites (40%).

E. Key Takeaways

A good number of user habits and preferences are correlated with age: Younger respondents, who tend to earn less, are less likely to own multiple devices, and more likely to be on prepaid subscriptions and to prefer Wi-Fi over the operator's network than their older cohorts. In the same, or rather opposite manner, those in developed economies are more likely to have multiple devices and have multiple mobile plans. That general income level can be a significant determinant of one's mobile Internet usage is hardly surprising, but it also points to the importance of addressing the affordability of mobile Internet access. The majority of those who will be going online for the first time using a mobile device will be from emerging markets, which also have very young populations.

Younger users, as well as those from developing economies, are also more likely to access the Internet primarily through their mobile device. This has implications on data connection speed. The study has found that younger people, as well as those with multiple devices, likewise engage more deeply with the mobile Internet through a variety of activities and applications, including social networking and entertainment but also other purposes, such as accessing jobs and educational materials. More investments to improve network capacity and quality, combined with measures to reduce cost, especially for prepaid packages, are thus vital to enabling a richer online experience for existing and future mobile users, and in fostering greater demand for operators' data services.

Notes

For the purposes of this report, respondent countries are grouped into 'Emerging Asia-Pacific' and 'Developed Asia-Pacific'. More information on the economic groupings and on global mobile Internet trends can be found in the Internet Society [Global Internet Report 2015](#)

Emerging Asia-Pacific: Afghanistan, Bangladesh, Bhutan, Cambodia, People's Republic of China, Cook Islands, Federated States of Micronesia, Fiji, India, Indonesia, Kiribati, Malaysia, Maldives, Marshall Islands, Mongolia, Myanmar, Nepal, Pakistan, Papua New Guinea, Philippines, Samoa, Solomon Islands, Sri Lanka, Thailand, Tonga, Vanuatu, and Vietnam

Developed Asia-Pacific: Australia, Brunei Darussalam, Hong Kong (SAR), Japan, Macao (SAR), New Caledonia, New Zealand, Singapore, Republic of Korea, and Taiwan, Republic of China

Please send all comments and feedback to:

Internet Society – APAC Bureau

9 Temasek Boulevard
#09-01 Suntec Tower 2
Singapore 038989
Tel: +65 6407 1470
Fax: +65 6407 1501
Email: apac@isoc.org
www.internet-society.org

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