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Benchmarking Demand: Pakistan and the Internet Users' Perspective

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Recommended Citation

Khan, Arzak and Nisbet, Erik C.. (2016). Benchmarking Demand: Pakistan and the Internet Users' Perspective. *Internet Policy Observatory*.

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Benchmarking Demand: Pakistan and the Internet Users' Perspective

Abstract

This report is the third in a series that examines public attitudes and preferences about Internet censorship and regulation in states in which media and Internet use are subject to increasing restrictions.

In the context of Pakistan, where rapid increases in internet access and usage are accompanied by a propensity to regulate this new cyber-territory, the goal of this report is to uncover the views of Pakistani Internet users with respect to the regulation and control of online spaces.

In each of these reports, we seek to provide insight into who uses the Internet in each country and the most used and trusted sources of online and offline information. But more than that, the surveys seek to add to a process: learning how to plumb general views about the influence of the Internet on politics and society and chart attitudes concerning censorship on various political, religious and social grounds. The reports test an approach to determining who, among competing institutions, people trust to regulate the Internet, what constitutes their policy preferences about Internet regulation, and the extent to which Internet regulation issues might figure in political mobilization efforts in furtherance of Internet freedom.

Disciplines

Communication Technology and New Media | Critical and Cultural Studies | International and Intercultural Communication

Comments

[Click here](#) to read an accompanying blog post by Jahanzaib Haque reflecting on the report's findings and Internet governance in Pakistan, including the proposed Prevention of Electronic Crimes Bill.

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Benchmarking Demand: Pakistan and the Internet Users' Perspective

Erik Nisbet and Arzak Khan



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Benchmarking Demand: Pakistan and the Internet Users' Perspective was produced as a part of the Internet Policy Observatory, a program at the Center for Global Communication Studies, the Annenberg School for Communication at the University of Pennsylvania. The report was written by Erik Nisbet and based on the survey designed and implemented by Arzak Khan at the Internet Policy Observatory Pakistan (iPOP) and the Center for Global Communication Studies.

The Internet Policy Observatory Pakistan (iPOP) conducts public interest research on ICT policy and regulation in Pakistan. It provides researchers, governments, regulators, operators, multilateral institutions, development agencies and community organizations with the information and analysis required to develop innovative and appropriate policies for modern age digital technologies. iPOP contributes to the gathering of up to date ICT data and establish repository of information for furthering research and policy formulation on Internet Regulation, Surveillance, Privacy, Net-Neutrality, Media Regulation and Freedom of Expression. The Observatory also aims to promote interaction between researchers, activists, academics and institutions for conducting public interest ICT policy research and campaigns.

Arzak Khan, the Director of IPOP, is a cyber policy expert focused on internet development, human rights online, cybersecurity and the expansion of internet access in the global South. He is passionate about empowering marginalised voices from the South in global cyber policy debates and decision-making processes. He has a wide experience of serving in public sector and specialist management roles at the federal level, and holds an MSc in Communications Management from University of Strathclyde.

Erik C. Nisbet (Ph.D., Cornell University) is an associate professor of communication and political science at the Ohio State University. He is also a faculty associate at the Mershon Center for International Security Studies and coPrincipal Investigator of the Comparative National Election Project funded by Mershon. His research focuses upon the role of media in comparative democratization, public opinion, and political behavior.

The Center for Global Communication Studies (CGCS) is a leader in international education and training in comparative media law and policy. Based at the Annenberg School for Communication (University of Pennsylvania), CGCS produces original research, offers opportunities for graduate students, organizes conferences and trainings, and provides consulting and advisory assistance to academic centers, governments, and NGOs. The Center's interdisciplinary research and policy work address media regulation, media and democracy, monitoring and evaluation of media development programs, public service broadcasting, and the media's role in conflict and post-conflict environments.

CGCS's Internet Policy Observatory (IPO) is a program tasked with researching the dynamic technological and political contexts in which Internet governance debates take place and provides a networking function among relevant communities of activists, academics, and policy makers. The Observatory sponsors research and studies ongoing events and key decisions on Internet policy. To learn more about the project or to inquire about research collaborations with the IPO, please visit globalnetpolicy.org or email internetpolicy@asc.upenn.edu.

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Forward

By Monroe Price

This report is the third in a series that examines public attitudes and preferences about Internet censorship and regulation in states in which media and Internet use are subject to increasing restrictions. This report is about Pakistan; the other two about Russia and Turkey respectively. With respect to political system, history and other factors, these states are very different, but similar in the fact of contestation and reshaping of the relationship between government and Internet providers and users. They are also similar in that Internet freedoms in all three countries have substantially declined over the last three years while at the same time the percentage of the population using the Internet in each country has significantly increased.¹ Of the three contexts, Pakistan is the one with the lowest per capita usage by far.

In these worlds of increased Internet usage and accompanying propensity to regulate, the goal of these reports is to uncover the views of Internet users with respect to the regulation and control of online spaces. In each of these reports, we seek to provide insight into who uses the Internet in each country and the most used and trusted sources of online and offline information. But more than that, the surveys seek to add to a process: learning how to plumb general views about the influence of the Internet on politics and society and chart attitudes concerning censorship on various political, religious and social grounds. The reports test an approach to determining who, among competing institutions, people trust to regulate the Internet, what constitutes their policy preferences about Internet regulation, and the extent to which Internet regulation issues might figure in political mobilization efforts in furtherance of Internet freedom.

These are inordinately subtle and difficult issues to ascertain and exemplify. To assess more fully a comparative sense of the *demand* for Internet freedom would involve deep study of traditions of the role of speech in society and how public opinion refigures, establishes or disrupts narratives of legitimacy for particular policies. Demands for Internet freedoms

relate to significant variables including perceptions of stability, public views on morality, and the role of religion in society. These are variables that are often shaped by the governments themselves. These points of demand, of course, differ among different demographics and change according to direct experience and usage.

The ordinary hazards of public opinion research take on special characteristics in authoritarian or authoritarian-leaning contexts and Pakistan presents inordinate challenges. Those answering may be more sensitive to the consequences of participating; answers may be tilted to the perceived direction of the government. The framing and order of questions, always a delicate issue, may be exceedingly complex when dealing with politically fraught questions as is the case dealing with censorship, religion and government and social stability.

The low level of Internet use in Pakistan presented special obstacles. Partly because of that low level, this report only surveyed those who have access to the internet and therefore were primarily Internet users. This decision to survey a specific constituency has, of course, major interpretative consequences. Internet users skew very differently from the general population and their attitudes toward Internet regulation likely follow suit. In that sense, the findings of this report must be read with special care.

Take for example the general question of whether the Internet is a positive influence. Our study indicates that almost two-thirds of Pakistani Internet users (63%) believe the Internet has a rather positive influence, 17% believe it has a rather negative influence, and the remainder either believe it did not have any influence on people's lives (10%) or replied that they did not know (9%). Can this finding tell us much about the attitudes of non-Internet users, a much larger number and a somewhat different demographic? One clue lies in how opinions shift turning on frequency of Internet use. For example, heavy (90%) and moderate (86%) Internet users overwhelmingly believe the Internet has a positive influence while no light Internet users held this belief. Conversely, 61% of light Internet users believe the Internet has a negative influence while no heavy or moderate users held this belief.

¹ Russia and Pakistan are categorized as having "not free" Internet systems and Turkey is categorized as "partly free." See *2015 Freedom of the Net Report* available at www.freedomhouse.org

The gulf between the perceptions of light and heavy users, in the case of Pakistan, points to quite disparate senses of society and the threats of change. The report emphasizes that light Internet users are far more likely to agree with more negative beliefs about the Internet than heavy users. For example, four out of five light users (83%) believe the Internet is a tool for Western countries being used against Pakistan compared to only 1% of heavy users. Likewise, about three fourths (73%) of light Internet users believe the Internet threatens Pakistan's political stability compared to zero heavy Internet users who feel the same. Similar disparities probably relate to other ideas of negativity and such disparities likely pervade the society.

Other examples: 94% of Internet users surveyed were opposed to blocking entire online video platforms like YouTube, 89% were opposed to censoring online communication applications, 88% were opposed to censoring websites that share copyrighted material, 79% were against censoring social media accounts calling for anti-government protests, and 70% were opposed to censoring potentially defamatory or libelous content targeting public officials and politicians. Yet these findings exist in a context in which the state has, according to Jahanzaib Haque, "blocked all or parts of Facebook, YouTube, Blogspot and Twitter for hosting blasphemous or 'anti-state' content, often under direct order from the Supreme Court.... Thousands of 'blasphemous,' 'pornographic,' 'anti-Islam,' and 'anti-state' sites have been blocked over this time period, intermittently being unblocked, then blocked again."²

Pakistan offers other specific challenges to the conceptualization of public opinion in the formation of Internet policy. There is an ongoing large scale debate about the nature of Pakistani society in an environment of fierce contestation over national direction. That debate exists with deep divisions about the role of the state in defining issues of belief and practice. In addition to powerful religious strains there is an active and secular civil society. Traditional notions of speech and society persist and even flourish in the sometimes anemic face of modernism. These characteristics make their complex mark on the shape of Internet regulation.

Our report shows the resulting fault lines for public debate: in general, light users are substantially more willing to support government censorship and blockage of online content as compared to moderate and heavy Internet users, especially considering sensitive political and religious topics. For example, 96% of light users support censoring websites that promote hate speech and religious disharmony compared to 65% of heavy Internet users. Likewise, 69% and 64% of light users support censoring terrorist websites and social media accounts calling for anti-government protests respectively compared to 27% and 1% of heavy users who feel the same.

The uncertainties of Pakistan's polity mean that this polarization will persist at least in the short run. But Pakistan subscribes to international norms of civil and political rights. Economic advancement turns on modernization; and modernization turns on more ample education, access to information and a more consistent exercise of freedom of expression practices. In a world in which there are vigorous attempts to expand, maintain and guarantee Internet freedoms, it is vital to have a more textured view of the environment in which debate takes place, in which civil society seeks to advance positions and in which regulators and government representatives decide. It is useful to assess, over time, which arguments resonate, which entities are trusted, what influences publics and how public attitudes are or should be taken on board by those who make policy.

In a global debate over Internet policy—in the pursuit of a free Internet consistent with international norms and aspirations—public opinion matters. This report and the earlier ones on Russia and Turkey are part of the ongoing work of the Internet Policy Observatory. These are pioneering efforts at exploring the relation of public opinion to regulation. All three reports demonstrate how difficult and delicate these questions are and how much attention must be paid to them in the future.

² Haque, Jahanzaib. "Shots in the Dark: An Analysis of Internet Governance in Pakistan." CGCS Media Wire. May 2016. <http://www.global.asc.upenn.edu/blog/>.

Executive Summary of Survey Results

Profile of Pakistani Internet Users

The plurality of adult Pakistani Internet users may be categorized as “heavy Internet users” who use the Internet every day (41% of respondents). The second largest segment is “moderate Internet users” who report using the Internet several times a week (30% of respondents), followed by “light Internet users” who report using the Internet several times a month or less (28% of respondents).

Heavy internet users in Pakistan are very young (72% under 30 years of age), largely male (59%), and highly educated (72% with at least some university schooling). Light users are much more likely to be over thirty years of age (42% for light compared to 18% for heavy users), women (47% for light vs. 36% for heavy users), but more highly educated (38% of light users have graduate degree vs. 31% for heavy users).

Pakistani Internet users most commonly use the Internet for corresponding by email (91%), communicating on social networking sites (77%), reading international newspapers (68%), posting video clips online (68%), or downloading/listening to music or watching videos (65%). The most infrequent activities are writing (7%) or reading blogs (14%) or using dating websites (9%).

Primary Sources of Information Among Pakistani Internet Users

Television news is by far the most popular source of information among Pakistani Internet users, with 80% of survey respondents selecting this communication channel as one of their three top sources of information. After television news, social networking sites are the most commonly cited source of information used by Pakistani Internet users with 55% of respondents selecting it as one of their top three sources. The third most reported source of information for Pakistani Internet users are regional newspapers.

Though Pakistani TV news is the most cited source of information across all Internet use segments, heavy Internet users (91%) were significantly more likely to cite it as a source of information than light (74%) or moderate (71%) users. This contrast is greater when considering social networking sites, with 80% of heavy Internet users reporting them as a top source of

information as compared to 39% of light and moderate Internet users. Conversely, light (58%) and moderate (64%) Internet users were substantially more likely to cite radio as a top information source than heavy Internet users (10%).

The most trusted online sources of information selected by Pakistani Internet users were online social networks (76%) and Internet publications and news portals (75%) followed by online forums, blogs, and chats (71%). Online sources of foreign news (30%) were the least trusted sources of online information.

Heavy and moderate Internet users were substantially more likely to report that they trust online social networks (84% for each), Internet publications, online newspapers, and news portals (90% of heavy and 100% of moderate) than light users (53% and 27%, respectively). In contrast, light Internet users were more likely to trust online forums and chats (89%) and Pakistani news sources (77%) than heavy Internet users (66% and 54%, respectively).

Pakistani Attitudes about the Influence of the Internet

In total, almost two-thirds of Pakistani Internet users (63%) believe the Internet has a rather positive influence, 17% believe it has a rather negative influence, and the remainder either believe it did not have any influence on people’s lives (10%) or replied that they did not know (9%).

This perception varies widely by frequency of Internet use. For example, heavy (90%) and moderate (86%) Internet users overwhelmingly believe the Internet has a positive influence while no light Internet users held this belief. Conversely, 61% of light Internet users believe the Internet has a negative influence while no heavy or moderate users held this belief.

Overall, Pakistani Internet users have a rather positive view of the influence of the Internet with a couple exceptions: three fourths of respondents (75%) believe it is difficult to remove information once it is online, and a majority of respondents (55%) believe the Internet allows the government to surveil people. Majorities of Pakistani Internet users, however, believe the Internet makes life easier (73%), promoting access should be

a government priority (55%), and society could not function without the Internet (55%).

Large majorities of Pakistani Internet users disagree with common arguments about the negative impacts of the Internet on Pakistan. Four out of five (82%) of Internet users disagree that there is too much immoral content online, and about three out of five respondents disagree that the Internet is a threat to political stability (63%), represents a Western agenda being used against Pakistan (60%), or threatens family values (58%).

However, light Internet users are likely to agree with more negative beliefs about the Internet than heavy users. For example, four out of five light users (83%) believe the Internet is a tool for Western countries being used against Pakistan compared to only 1% of heavy users. Likewise, about three fourths (73%) of light Internet users believe the Internet threatens Pakistan's political stability compared to zero heavy Internet users who feel the same.

Pakistani Attitudes about Internet Censorship

Overall, 58% of Pakistani Internet users believe the Internet should be completely free of government censorship, though there was substantial variation by frequency of Internet use. For example, 92% of heavy Internet users state that they do not support state censorship compared to 25% of light Internet users. About one in eight (12%) of all Pakistani Internet users believe that information on the Internet needs to be censored.

On content blocking specifically, three out of five Pakistani Internet users (61%) agree that there should be no blocking of content on the Internet in general, yet Internet users are substantially more ambivalent when it comes to blasphemous content with half as many (30%) disagreeing with its censorship and the plurality of respondents (44%) neither agreeing nor disagreeing with its censorship.

Large majorities of Pakistani Internet users support government censorship of four types of online content: 92% support censoring propaganda promoting radical political ideas, 80% support censoring pornographic websites, 79% support censoring religious hate speech, and 62% support censoring Balochistan separatist websites.

There is a great deal of opposition among Pakistani Internet users to censoring five other types of content, specifically: 94% of Internet users were opposed to blocking entire online video platforms like YouTube, 89% were opposed to censoring online communication applications, 88% were opposed to censoring websites that share copyrighted material, 79% were against censoring social media accounts calling for anti-government protests, and 70% were opposed to censoring potentially defamatory or libelous content targeting public officials and politicians.

In two cases, Pakistani Internet users held polarized views about censorship of terrorist organization's websites and blasphemous content such as "Innocence of the Muslims." Roughly equal numbers of Internet users supported (30% and 24%, respective) and opposed (31% and 21%, respectively) censoring these types of content.

In general, light users are substantially more willing to support government censorship and blockage of online content as compared to moderate and heavy Internet users, especially considering sensitive political and religious topics. For example, 96% of light users support censoring websites that promote hate speech and religious disharmony compared to 65% of heavy Internet users. Likewise, 69% and 64% of light users support censoring terrorist websites and social media accounts calling for anti-government protests respectively compared to 27% and 1% of heavy users who feel the same.

Pakistani Attitudes about Internet Regulation

NGOs and civil society groups, and international organizations like the United Nations and the International Telecommunication Union are virtually tied as the overall trusted regulators of the Internet (45% and 44% respectively), though more Pakistanis rank international organizations (18%) as their first most trusted regulator of the Internet as compared to civil society (11%).

The Pakistani government (41%) and the Pakistan Telecommunication Authority (38%) are roughly tied for the second most trusted set of regulators of the Internet, though the Pakistani government (22%) was cited as a first choice for more respondents than any other option. Other governmental bodies such as the prime minister

(23% of all Internet users), security services (22%), and the president of Pakistan (6%) were selected as trusted regulators of the Internet.

Heavy Internet users were substantially more likely to trust international organizations such as the UN or ITU (54% vs. 40%) or civil society groups (51% vs. 41%) than light Internet users. In addition, about one third of heavy Internet users selected either technical experts (35%) or researchers (31%) as trusted Internet regulators as compared to about one-fifth of light Internet users (22%) who did the same. Conversely, light internet users were significantly more likely to select the Pakistani Telecommunication Authority (42% vs. 31%) and the prime minister (28% vs. 9%) than heavy Internet users.

Pakistanis were asked whether they believe the government should regulate the Internet more than they currently do, less than currently do, or maintain the status quo. Overall, the majority of Pakistani Internet users reported that they want less regulation (53%) or none at all (7%). About one-quarter (23%) desire more Internet regulation and only 1% want about the same amount. A sizable percentage of respondents answered that they did not know an answer to this question (16%).

The plurality of Pakistani Internet users (45%) believe that the government's primary motivation for Internet regulation is to protect themselves from criticism while about one-third selected it was to curtail freedom of expression (35%). About one in ten Internet users selected that the government's primary motivation is to protect the public from blasphemous content (11%) or to protect national security (9%). These perceptions did not vary widely by frequency of Internet use segment.

Overall, 79% of Pakistani Internet users agree with the statement that "the regulation of the internet affects my personal freedom," 9% disagree, and 12% reported that they do not know. This sentiment again varied widely by frequency of Internet use, with 82% of heavy Internet users agreeing compared to 60% of light users. In contrast, 16% of light Internet users disagree with the statement as compared to 1% of heavy users.

Large majorities of Pakistani Internet users agree that greater government control over the Internet would limit their freedom of expression (83%), would limit the content they access (82%), would make them fearful that they are under surveillance (67%), and would stifle innovation (62%).

Pakistani users overwhelmingly disagree that more government control and censorship of the Internet would have no effect (95%), would help make the Internet safe for everyone (83%), and would help society reap more benefits from the Internet (77%). However, when questioned whether greater government control of the Internet would lead the respondent to use the Internet less, Pakistani Internet users are somewhat evenly divided, with 55% agreeing that it would and 42% disagreeing.

Overall, 34% of Internet users report that they would support a government shutdown of the Internet in the case of a national emergency, followed by 10% believing a temporary shutdown would be justified in the case of a mass protest. In contrast, a majority of Internet users (52%) believe the shutdown of the Internet by the Pakistani government would never be justified no matter the situation. A remaining 8% of respondents said that they did not know.

Pakistani Citizen Mobilization and Protest

Across all respondents, 18% state that a protest against Internet censorship in their community is possible, while 82% said it is not. However, 68% of respondents report that they would personally take part if such a protest occurred, while 32% said they would not. If you cross-tabulate the two questions, 56% of Pakistani Internet users believe a protest in their community is unlikely, BUT if one did occur they would participate.

Heavy Internet users (37%) are substantially more likely than moderate (4%) or light (7%) users to believe a protest against Internet censorship in their local community is possible. The variation is less stark by frequency of Internet use when respondents are asked if they would personally take part in a protest if it occurred, with majorities in each segment replying they would take part, though the highest percentage was amongst heavy Internet users (75%).

Profile of Pakistani Internet Users

The percentage of Pakistanis using the Internet increased by 37.5% between 2009 and 2013, though overall internet penetration remains very low with only 11% of the population having access to the Internet, according to 2013 figures from the International Telecommunication Union.³ Due to this low penetration rate, only Internet users were interviewed for this survey with non-users excluded. Respondents to the survey may be split into three segments based on their frequency of Internet use (see Figure 1). The largest segment is “heavy Internet users” who use the Internet every day (41% of respondents). The second largest segment is “moderate Internet users” who report using the Internet several times a week (30% of respondents). The smallest segment is “light Internet users” who report using the Internet several times a month or less (28% of respondents).

As detailed in Table 1, Pakistanis who use the Internet are young (72% under 30 years of age), largely male (59%), and highly educated (72% with at some

university schooling). These demographics also vary widely across frequency of Internet use, with light users much more likely to be over thirty years of age (42% for light compared to 18% for heavy users), women (47% for light vs. 36% for heavy users), but more highly educated (38% of light users have graduate degree vs. 31% for heavy users). However, the greater educational attainment for light users may be a factor of their greater age, as 82% of heavy users are currently under the age of thirty.

The plurality of Pakistani Internet users report accessing the Internet via a home computer (44% of respondents), though heavy users (53%) were significantly more likely to use this mode of access. The second most popular means to access the Internet for heavy and moderate Internet users is via mobile phones (27% in each category); for light Internet users it is a virtual tie between tablet devices (20%) and mobile phones (18%). Small percentages of Internet users access the Internet via public computers (15%) and Internet cafés (11%).

³ International Telecommunication Union *ICT Indicators 2014 Database*

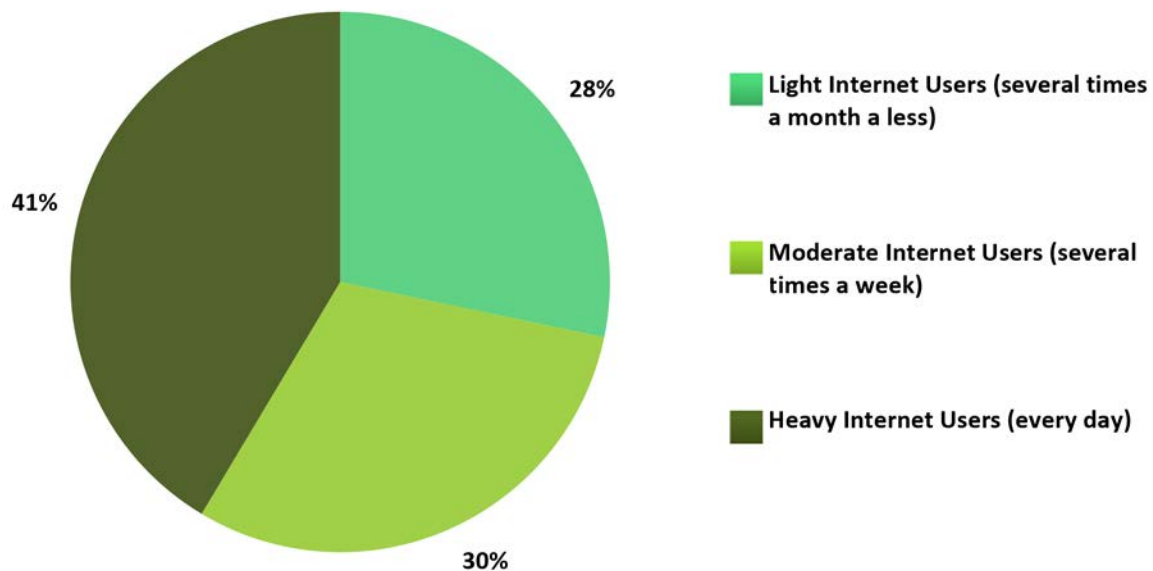


FIGURE 1: PAKISTANI FREQUENCY OF INTERNET USE (percentage of total respondents)

Internet users were asked about the types of online activities they engaged in on a monthly basis or more frequently (see Table 2). Among all Internet users, the most popular activities were corresponding by email (91%), communicating on social networking sites (77%), reading international newspapers (68%), posting videos or video clips online (68%), downloading or listening to music or watching videos online (65%), and using Internet telephony (63%). However, the percentage of respondents who engaged in these activities on a monthly basis or more differed starkly by

frequency of Internet use. For example, heavy Internet users were substantially more likely to read national (71%) or international (76%) newspapers online, post videos or video clips online (82%), watch TV programs on the Internet (45%), engage in online banking (42%), and use dating websites (22%) than light users. In comparison, light Internet users were substantially more likely than heavy Internet users to correspond by email (96%), communicate on social networks (86%), use Internet telephony (72%), download/listen online music and watch videos (100%).

TABLE 1: PROFILE CHARACTERISTICS OF INTERNET USE SEGMENTS (percentage of total respondents)

| Demographic Category | Frequency of Internet Use | | | All Internet Users |
|--------------------------------|---------------------------|----------|-------|--------------------|
| | Light | Moderate | Heavy | |
| Age | | | | |
| % 18-29 years old | 58 | 74 | 82 | 72 |
| % 30-44 years old | 35 | 20 | 14 | 22 |
| % 45 or more years old | 7 | 6 | 4 | 6 |
| Gender | | | | |
| % Men | 53 | 58 | 64 | 59 |
| % Women | 47 | 42 | 36 | 41 |
| Educational Attainment | | | | |
| % High School or less | 25 | 29 | 30 | 28 |
| % Bachelor/ University Degree | 38 | 33 | 38 | 37 |
| % Graduate Degree | 38 | 38 | 31 | 35 |
| Mode of Internet Access | | | | |
| % Home Computer | 37 | 38 | 53 | 44 |
| % Mobile Phone | 18 | 27 | 27 | 24 |
| % Tablet Device | 20 | 14 | 15 | 16 |
| % Public Computer | 13 | 15 | 16 | 15 |
| % Internet Café | 17 | 13 | 5 | 11 |

TABLE 2: ONLINE ACTIVITIES ON A MONTHLY BASIS OR MORE BY INTERNET USE SEGMENTS (percentage of Internet users, multiple responses)

| Type of Internet Activity | Frequency of Internet Use | | | % of All Internet Users |
|--|---------------------------|---------------------|------------------|-------------------------|
| | % of Light Users | % of Moderate Users | % of Heavy Users | |
| Correspond by email | 96 | 100 | 82 | 91 |
| Communicate on Social Network Sites like (e.g. Facebook, Twitter, Tumblr, Instagram) | 86 | 95 | 60 | 77 |
| Read International Newspapers | 58 | 68 | 76 | 68 |
| Post videos or video clips online | 16 | 96 | 82 | 68 |
| Download or Listen to Music Online or Watch videos | 100 | 57 | 51 | 65 |
| Use Internet telephony (Skype, Google voice, Viber, etc.) | 72 | 81 | 45 | 63 |
| Read National Pakistani Newspapers | 22 | 56 | 71 | 52 |
| Watch TV Programs on the Internet | 0 | 35 | 45 | 29 |
| Manage bank account through Internet | 0 | 25 | 42 | 26 |
| Read Blogs | 10 | 10 | 20 | 14 |
| Use partner/dating websites | 0 | 0 | 22 | 9 |
| Write a Blog | 3 | 1 | 14 | 7 |

Primary Sources of Offline and Online Information Among Pakistani Internet Users

Survey respondents were asked to rank the top three primary sources of information that they rely upon the most. Sources are presented in Figure 2 with the percentage that selected each source as their primary, secondary, or tertiary source of information. Television news is by far the most popular source of information among Pakistani Internet users, with 45% of survey respondents selecting this communication channel as their primary source of information, 29% selecting television as their secondary source, and 6% as their tertiary source – 80% of all respondents in total. After television news, social networking sites are the most commonly cited source of information by Pakistani Internet users, with 55% selecting it as one of their top three sources. Regional newspapers were the third most selected source of information by Pakistani Internet users, with 43% of respondents selecting it among their top three sources of information – and 9% stating it was their primary source.

Table 3 provides the combined percentage of Pakistanis that named each source as one of their top three sources of information by Internet use segment. Though Pakistani TV news is the most cited source of information across all Internet use segments, heavy Internet users (91%) were significantly more likely to cite it as a source of information than light (74%) or moderate (71%) users. This contrast is greater when considering social networking sites, with 80% of heavy Internet users reporting them as a top source of information as compared to 39% of light and moderate Internet users. Conversely, light (58%) and moderate (64%) Internet users were substantially more likely to cite radio as a top information source than heavy Internet users (10%).

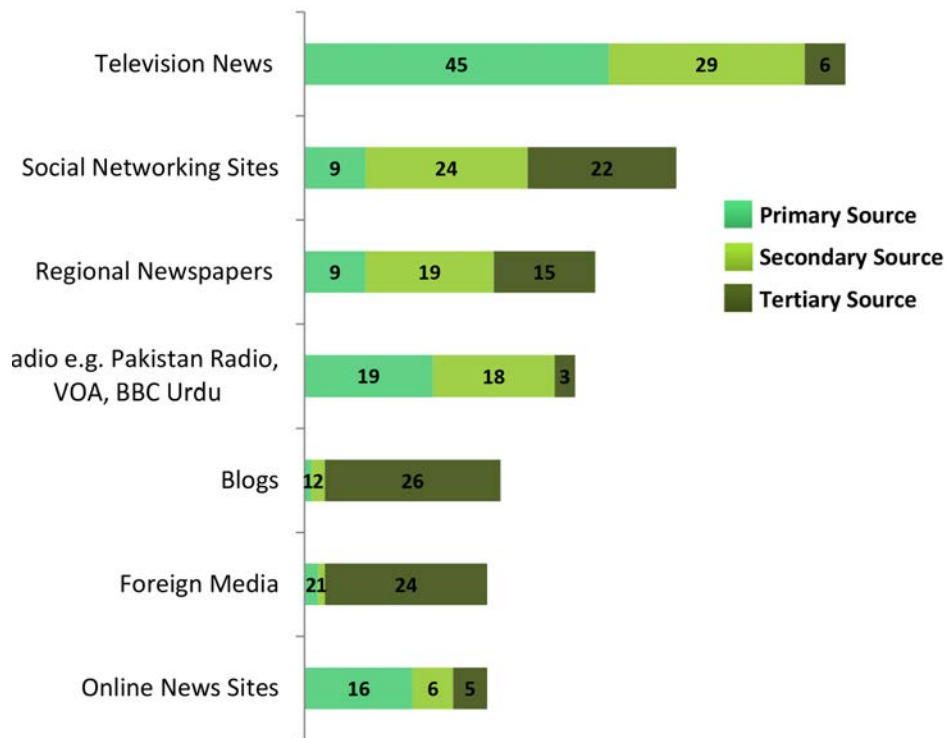


FIGURE 2: TOP THREE PRIMARY SOURCES OF INFORMATION (percentage of respondents who ranked each source as primary, secondary, or tertiary)

TABLE 3: TOP 3 PRIMARY SOURCE OF INFORMATION BY INTERNET USE SEGMENTS (percentage of total respondents, multiple responses)

| Top 3 Primary Sources of Information | Frequency of Internet Use | | | % of All Internet Users |
|--------------------------------------|---------------------------|---------------------|------------------|-------------------------|
| | % of Light Users | % of Moderate Users | % of Heavy Users | |
| Television News | 74 | 71 | 91 | 80 |
| Social Networking Sites | 39 | 39 | 80 | 55 |
| Regional Newspapers | 42 | 40 | 45 | 43 |
| Radio News | 58 | 64 | 10 | 40 |
| Blogs | 28 | 30 | 29 | 29 |
| Foreign Media | 27 | 26 | 27 | 27 |
| Online News Sites | 30 | 29 | 22 | 26 |

Survey respondents were also asked how much trust Pakistanis place in different types of offline and online information sources (see Table 4). Among all respondents, offline sources of information were likely to be trusted more than online sources of information. In-person acquaintances and friends were ranked as the most trustworthy offline source (91%), followed closely by printed newspapers and magazines (88%), advertising on TV and in print (88%), and lastly news on TV or radio (74%). However, across Internet use segments, light users were significantly more trusting of information from acquaintances/friends (96% vs. 91%), printed newspapers and magazines (93% vs. 86%), and TV and radio news (85% vs. 72%) than heavy Internet users.

The most trusted online sources of information are online social networks (76%) and Internet publications and news portals (75%) followed by online forums, blogs, and chats (71%). Online sources of foreign news (30%) were reported as the least trusted source of online information. Interestingly, almost three times as many Pakistani Internet users trust advertising on TV or in print (88%) as trust advertising online (31%).

Across Internet use segments, significant differences in trust also emerged. Heavy and moderate Internet users are substantially more likely to trust online social networks (84% for each) and Internet publications, online newspapers, and news portals (90% of heavy and 100% of moderate) than light users (53% and 27%, respectively). In contrast, light Internet users report they are more likely to trust online forums and chats (89%) and Pakistani news sources (77%) than heavy Internet users (66% and 54%, respectively).

TABLE 4: TRUST IN SOURCES INFORMATION BY INTERNET USE SEGMENTS (percentage of respondents who completely/rather trusted source)

| Type of Source | Frequency of Internet Use | | | % of All Respondents |
|--|---------------------------|----------|-------|----------------------|
| | Light | Moderate | Heavy | |
| Offline Sources | | | | |
| Tips from acquaintances, friends (not online) | 96 | 87 | 91 | 91 |
| Printed Newspapers & magazines | 93 | 86 | 86 | 88 |
| Advertising on TV & Print | 81 | 84 | 97 | 88 |
| News on TV, radio | 85 | 65 | 72 | 74 |
| Online Sources | | | | |
| Online Social networks | 53 | 84 | 84 | 76 |
| Internet-publications (online Newspapers, news portals, online-TV) | 27 | 100 | 90 | 75 |
| Forums, blogs, chats online | 89 | 62 | 66 | 71 |
| In general, information from Pakistani news sources like Geo TV, Express news | 77 | 61 | 54 | 63 |
| Internet advertising | 36 | 70 | 0 | 31 |
| In general, information from foreign news sources (ex. Foreign news websites such as BBC, CNN) | 62 | 20 | 14 | 30 |

Pakistani Attitudes About the Influence of the Internet

Survey respondents were queried on whether they perceived the Internet as having an overall positive influence on people’s lives, an overall negative influence, or no influence at all. In total, almost two-thirds of Pakistani Internet users (63%) believe the Internet has a rather positive influence, 17% believed it has a rather negative influence, and the remainder either believed it did not have any influence on people’s lives (10%) or replied they did not know (9%).

However, as illustrated in Figure 3, the perceived influence of the Internet varies significantly by frequency of Internet use. Heavy (90%) and moderate (86%) Internet users overwhelmingly believe the Internet has a positive influence compared to zero light users feeling the same. Conversely, while no moderate or heavy users feel the Internet has a negative influence, 61% of light Internet users believe it does.

Survey respondents were also queried whether they agreed or disagreed with several common beliefs

about the positive and negative impacts of the Internet on Pakistan and society in general. Figure 4 provides the percentage of respondents who agree, disagree, or neither agree or disagree with each statement.

Overall, Pakistani Internet users have a rather positive view of the influence of the Internet with a couple exceptions: three fourths of respondents (75%) believe it is difficult to remove information once it is online, and a majority of respondents (55%) believe the Internet allows the government to surveil people. However, majorities of Pakistani Internet users believe the Internet makes life easier (73%), promoting access should be a government priority (55%), and that society could not function without the Internet (55%).

Large majorities of Pakistani Internet users disagree with common arguments about the negative impacts of the Internet on Pakistan. Four out of five (82%) Internet users disagree that there is too much immoral content online, and about three out of five respondents disagree that the Internet is a threat to political stability (63%), represents a Western agenda being used against Pakistan (60%), or threatens family values (58%). At the same time, there is a substantial minority of Internet users in Pakistan that believe that the Internet is a Western device that is used against Pakistan (26%).

Table 5 illustrates that agreement and disagreement with common beliefs about the Internet varies considerably by frequency of Internet use. For instance, heavy Internet users are substantially more likely to believe that the Internet allows the government to surveil the people and information is difficult to remove once its online (100% in each case among heavy Internet users) as compared to light Internet users (0% and 17% agree, respectively).

Heavy Internet users are also are substantially more likely to agree than light users that society cannot function

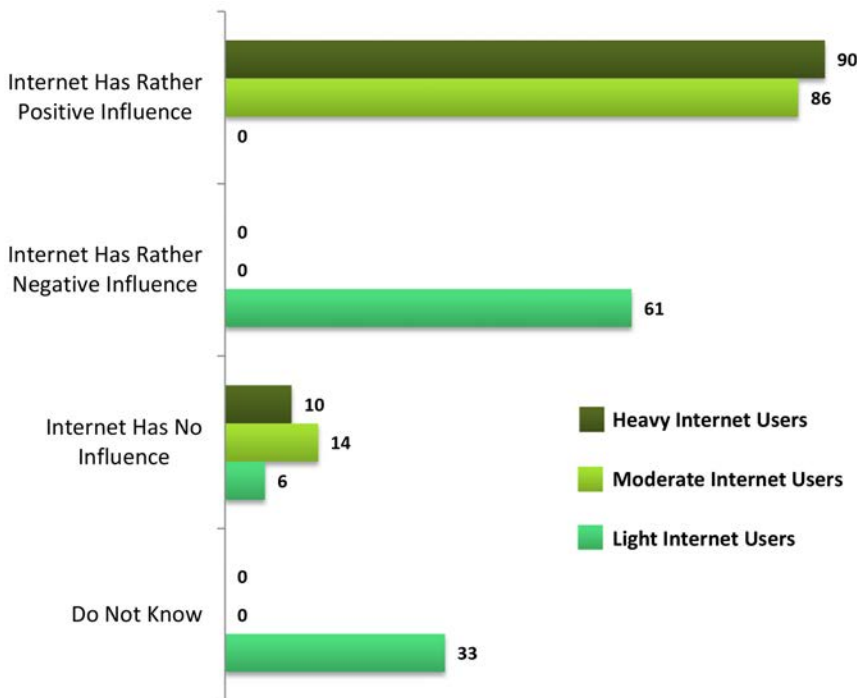


FIGURE 3: PERCEIVED INFLUENCE OF THE INTERNET BY INTERNET USE SEGMENTS (percentage of respondents who cited using source, single reponse)

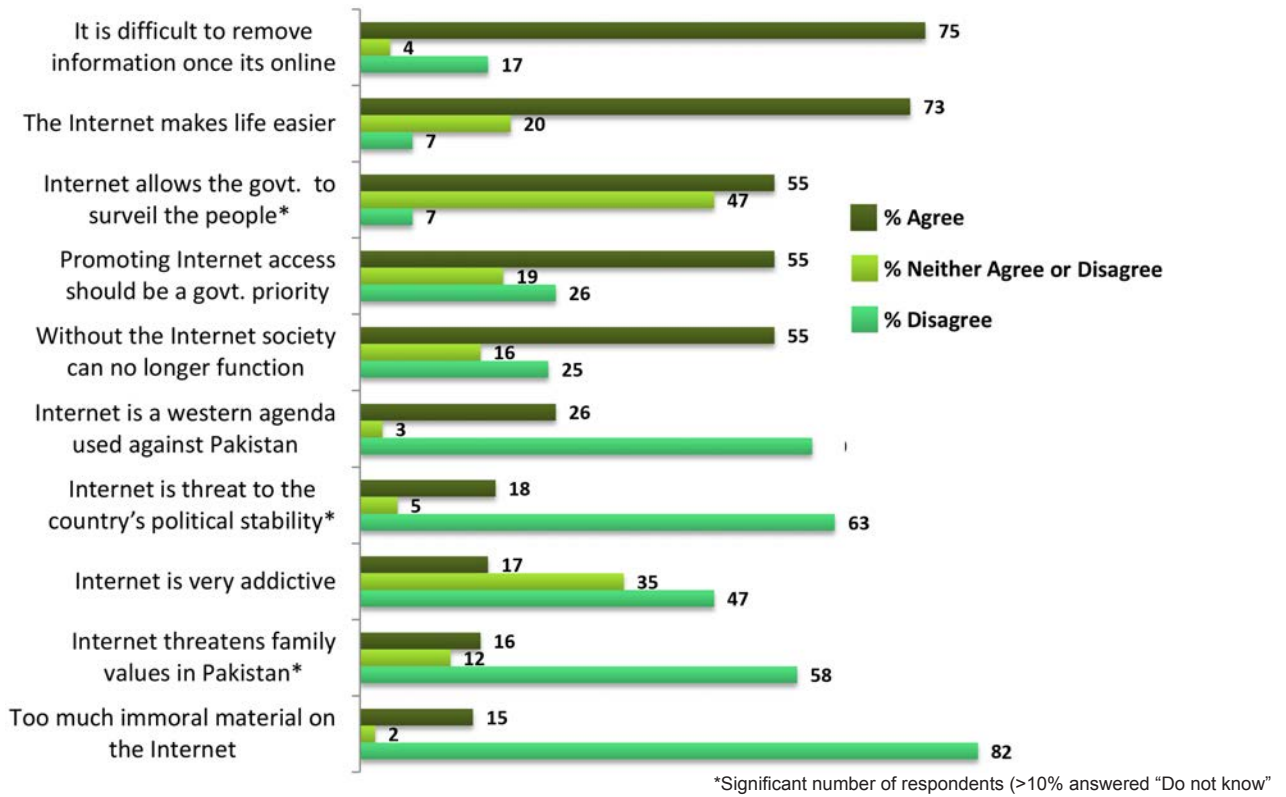


FIGURE 4: PAKISTANI INTERNET USER BELIEFS ABOUT THE INTERNET (percentage of respondents, single reponse)

TABLE 5: BELIEFS ABOUT THE INTERNET BY INTERNET USE SEGMENT (percentage of respondents, single reponse)

| Statement | Frequency of Internet Use | | | | | |
|--|---------------------------|----------|---------------------|----------|------------------|----------|
| | % of Light Users | | % of Moderate Users | | % of Heavy Users | |
| | Agree | Disagree | Agree | Disagree | Agree | Disagree |
| Internet allows the govt. to surveil the people* | 0 | 100 | 84 | 17 | 100 | 0 |
| It is difficult to remove information once its online | 17 | 68 | 100 | 0 | 100 | 0 |
| Without the Internet society can no longer function | 37 | 43 | 63 | 0 | 70 | 30 |
| Promoting Internet access should be a govt. priority | 37 | 40 | 54 | 23 | 70 | 17 |
| Too much immoral material on the Internet | 25 | 75 | 84 | 15 | 9 | 87 |
| Internet is a western agenda used against Pakistan | 83 | 17 | 9 | 91 | 1 | 92 |
| Internet threatens family values in Pakistan* | 22 | 30 | 14 | 64 | 0 | 100 |
| Internet is very addictive | 0 | 0 | 56 | 21 | 0 | 100 |
| Internet is threat to the country's political stability* | 73 | 23 | 0 | 82 | 0 | 100 |
| The Internet makes life easier | 7 | 25 | 100 | 0 | 0 | 100 |

without the Internet and promoting Internet access and development in Pakistan should be a government priority (70% vs. 37% in both cases).

Conversely, light Internet users are likely to agree with more negative beliefs about the Internet than heavy

users. For example, four out of five light users (83%) believe the Internet is a Western agenda being used against Pakistan compared to only 1% of heavy users. Likewise, about three fourths (73%) of light Internet users believe the Internet threatens Pakistan's political stability, whereas zero heavy Internet users feel the same.

Pakistani Attitudes About Internet Censorship

Pakistani Internet users were asked an overarching question about whether information on the Internet should be distributed freely without any censorship or whether some censorship by the government is necessary. Figure 5 depicts their preference by frequency of Internet use segment. Overall, 58% of respondents believe the Internet should be completely free of government censorship, though there was substantial variation by frequency of Internet use. For example, 92% of heavy Internet users do not believe in any state censorship at all compared to 25% of light Internet users.

About one in eight (12%) of all Pakistani Internet users believe that information on the Internet needs to be censored, and again this percentage varied

substantially by Internet use. Thirty-five percent of light Internet users believe information online needs to be censored by the government compared to only 2% of heavy Internet users. Thirty percent of Pakistani Internet users believe government censorship depends on the type of content in question, with moderate Internet users the most likely to select this response (53%).

In addition, respondents were asked whether they agree with two additional overarching statements (one positively phrased, one negatively phrased) about online content being blocked or censored by the Pakistani government. The first statement read, “There should be no blocking of content on the internet,” and the second read, “Internet should be censored due to

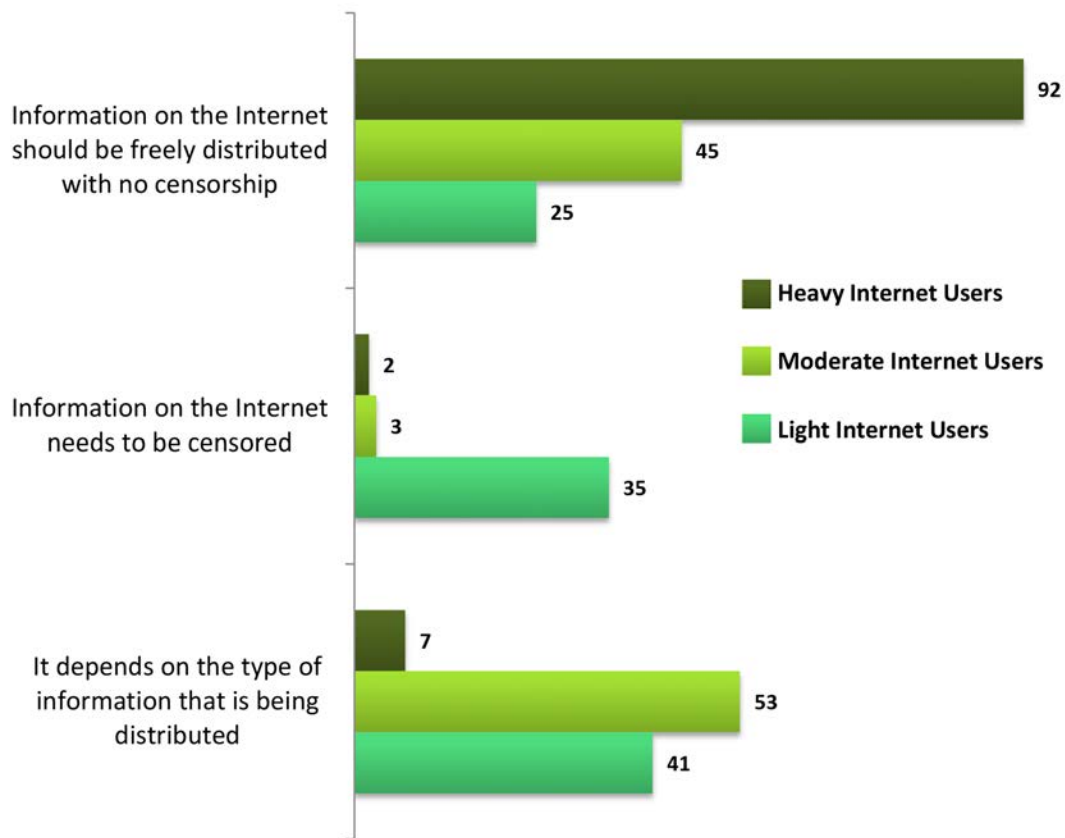


FIGURE 5: OVERARCHING VIEWS OF STATE INTERNET CENSORSHIP (percentage of respondents, single response)

having blasphemous content.” Figure 6 provides the percentage of respondents who agree, disagree, or neither agree nor disagree with each statement. Three out of five Pakistani Internet users (61%) agree that there should be no blocking of content on the Internet in general, yet Internet users are substantially more ambivalent when it comes to blasphemous content with only 30% disagreeing with the second statement and the plurality (44%) of respondents neither agreeing nor disagreeing with its censorship.

Cross-tabulating the two responses, one-third (33%) of all respondents agree that there should be no blocking of Internet content and disagree with censorship of blasphemous content, about one-third of respondents (29%) agree there should be blocking of online

content but neither agree nor disagree when asked about blasphemous content, one in five (20%) neither agree nor disagree with both statements, and 17% of respondents support blocking online content and censoring blasphemous content.

This inconsistency in opinion between the two statements on censorship may be due to two factors. First, when more specific, concrete forms of content are queried (such as blasphemous content) as compared to asking about censorship in a generalized, abstract form, public support for censorship increases. Secondly, this inconsistency could also be the result of either social desirability or fear of social or physical sanction due to religious beliefs if respondents articulate their opposition to censoring blasphemous content.

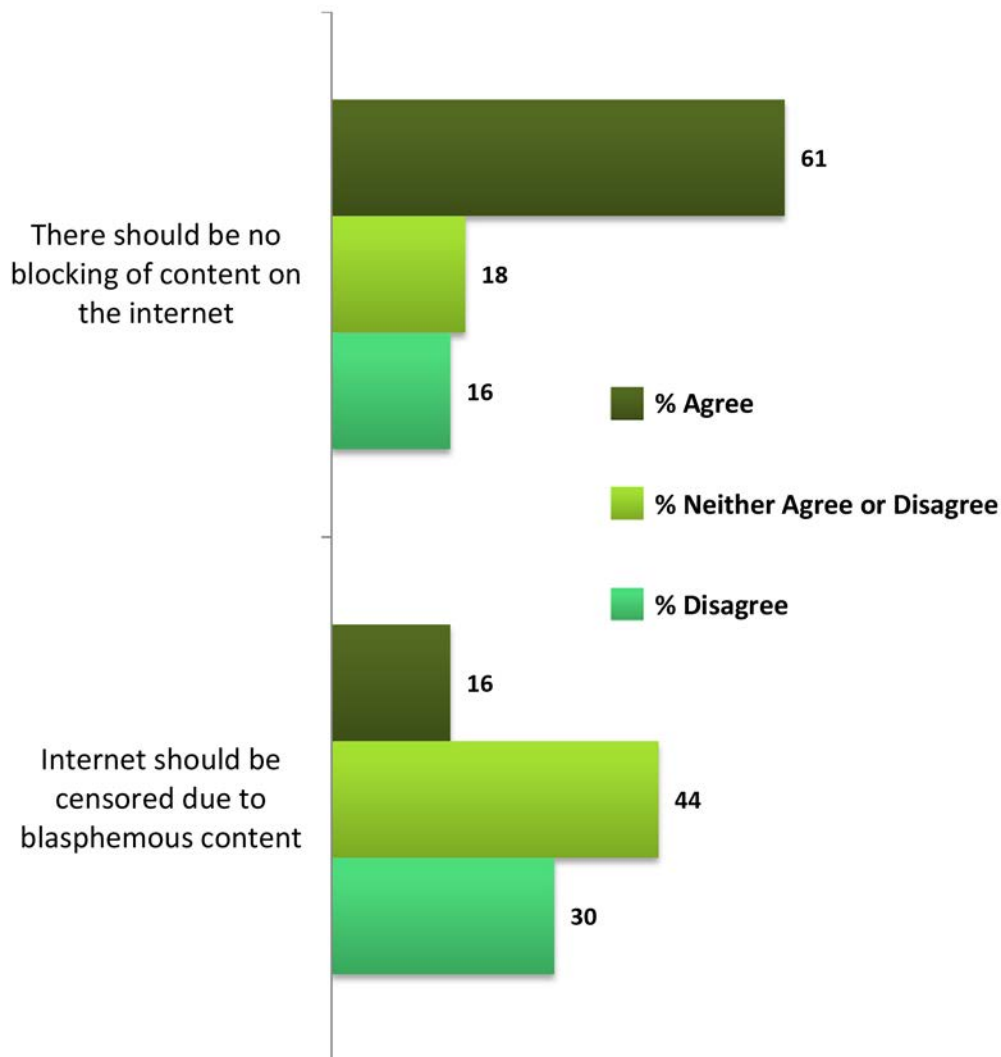


FIGURE 6: OVERARCHING VIEWS OF INTERNET CENSORSHIP (percentage of respondents, single reponse)

TABLE 6: OVERARCHING VIEWS OF INTERNET CENSORSHIP BY FREQUENCY OF INTERNET USE SEGMENTS (percentage of respondents, single reponse)

| Statement | Frequency of Internet Use | | | | | |
|---|---------------------------|----------|---------------------|----------|------------------|----------|
| | % of Light Users | | % of Moderate Users | | % of Heavy Users | |
| | Agree | Disagree | Agree | Disagree | Agree | Disagree |
| There should be no blocking of content on the Internet | 33 | 27 | 41 | 30 | 100 | 0 |
| Internet should be censored due to having blasphemous content | 36 | 0 | 31 | 21 | 0 | 57 |

Agreement/disagreement with these two statements also varied significantly by frequency of Internet use as Table 6 illustrates. All heavy Internet users (100%) are against online content blocking and nearly 60% of heavy Internet users disagree with censoring blasphemous content. In contrast, light and moderate Internet users' views surrounding online content blocking are more polarized. Thirty-three percent of light users agree with no blocking versus 27% who disagree, and 41% of moderate users agree with no blocking versus who 30% disagree. Likewise, more light (36%) and moderate (31%) Internet users agree that online blasphemous content should be censored than disagree (0% and 21%, respectively).

Survey respondents were also asked how much they agree or disagree with eleven types of online content being censored or blocked by the government in Pakistan. Figure 7 provides the results.

Large majorities of Pakistani Internet users support government censorship of four types of online content: 92% supported censoring propaganda promoting radical political ideas, 80% supported censoring pornographic websites, 79% supported censoring religious hate speech, and 62% supported censoring Balochistan separatist websites. Alternatively, there was a great deal of opposition among Pakistani Internet users to censoring five other types of content, specifically: 94% of Internet users were opposed to blocking entire online video platforms like YouTube, 89% were opposed to censoring online communication applications, 88% were opposed to censoring websites that share copyrighted material, 79% were against censoring social media accounts calling for anti-government protests, and 70% were opposed to

censoring potentially defamatory or libelous content targeting public officials and politicians. Pakistani Internet users held polarized views about two types of content: the censorship of terrorist organization websites and blasphemous content such as the "Innocence of the Muslims." Roughly equal numbers of Internet users supported (30% and 24%, respectively) and opposed (31% and 21%, respectively) censoring these types of content. However, similar to the other beliefs and preferences about the Internet, support or opposition to government censorship or blocking of specific types of Internet content varies substantially by frequency of Internet use as Table 7 illustrates.

In general, light users are substantially more willing to support government censorship and blockage of online content as compared to moderate and heavy Internet users, especially when considering sensitive political and religious topics. For example, 96% of light users support censoring websites that promote hate speech and religious disharmony compared to 65% of heavy Internet users. Likewise, 69% and 64% of light users support censoring terrorist websites and social media accounts calling for anti-government protests respectively, compared to 27% and 1% of heavy users who feel the same.

At the same time, there is some consensus on whether to censor or not censor certain types of content across the three Internet use segments. For instance, there is universal support for censoring propaganda that promotes radical ideas and censoring pornographic websites. Alternatively, there is universal opposition to censoring online communications applications, online video platforms like YouTube, and defamatory, slanderous, or libelous content about public officials/politicians.

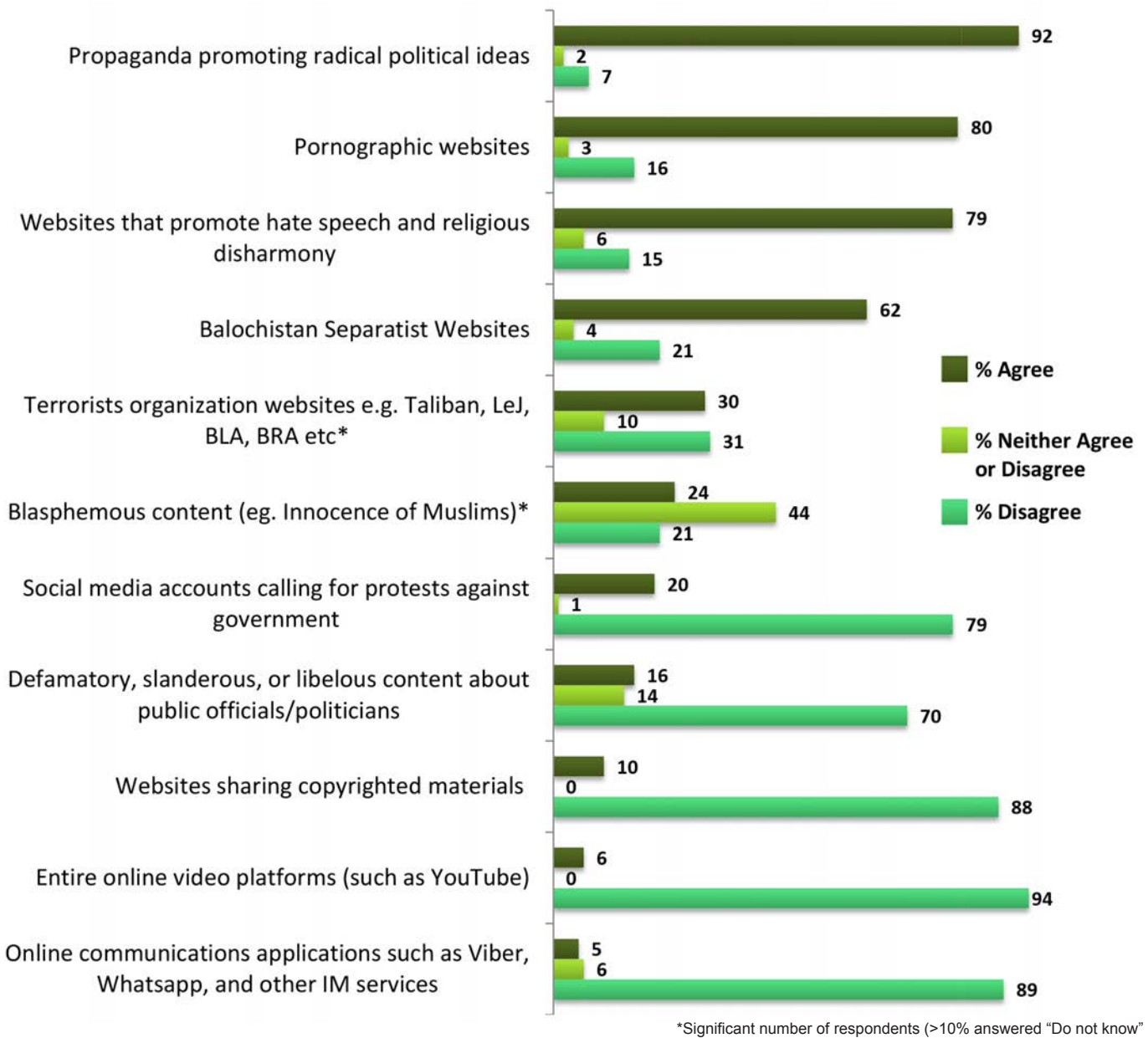


FIGURE 7: SUPPORT FOR CENSORING SPECIFIC TYPES OF INTERNET CONTENT BY THE PAKISTANI GOVERNMENT (percentage of total respondents, single response)

TABLE 7: SUPPORT FOR CENSORING SPECIFIC TYPES OF INTERNET CONTENT BY THE PAKISTANI GOVERNMENT BY INTERNET USE SEGMENT (percentage of respondents, single response)

| Statement | Frequency of Internet Use | | | | | |
|--|---------------------------|----------|---------------------|----------|------------------|----------|
| | % of Light Users | | % of Moderate Users | | % of Heavy Users | |
| | Agree | Disagree | Agree | Disagree | Agree | Disagree |
| Propaganda promoting radical political ideas | 99 | 0 | 99 | 1 | 81 | 16 |
| Pornographic websites | 79 | 15 | 91 | 5 | 74 | 25 |
| Websites promoting hate speech/religious disharmony | 96 | 0 | 84 | 10 | 65 | 28 |
| Balochistan separatist websites | 88 | 5 | 85 | 9 | 53 | 45 |
| Terrorists organization websites e.g. Taliban, LeJ, BLA, BRA etc. | 69 | 3 | 56 | 19 | 27 | 70 |
| Blasphemous content (e.g. Innocence of Muslims) | 36 | 0 | 31 | 21 | 14 | 43 |
| Defamatory, slanderous, or libelous content about public officials/politicians | 21 | 50 | 17 | 74 | 12 | 82 |
| Online communications applications | 9 | 77 | 4 | 90 | 1 | 99 |
| Social media accounts calling for protests against government | 64 | 35 | 1 | 97 | 1 | 97 |
| Entire online video platforms (such as YouTube) | 18 | 83 | 0 | 99 | 0 | 100 |
| Websites sharing copyrighted materials | 35 | 62 | 0 | 100 | 0 | 100 |

Pakistani Attitudes About Internet Regulation

Survey respondents were asked to rank the top three institutions or organizations they trusted the most to regulate the Internet, though 3% of respondents refused to rank any organization or institution and replied that no one should regulate the Internet. Organizations or institutions which garnered at least 6% of responses are featured in Figure 8, which presents the percentage of respondents that selected each institution or organization as their most trusted, second most trusted, and third most trusted regulator of the Internet. NGOs and civil society groups, and international organizations like the United Nations and the International Telecommunication Union were virtually tied as the overall trusted regulators of the

Internet (45% and 44% respectively), though more Pakistanis ranked international organizations (18%) as their most trusted regulator of the Internet compared to civil society (11%).

The Pakistani government (41%) and the Pakistan Telecommunication Authority (38%) were roughly tied for the second most trusted set of regulators of the Internet, though more Pakistanis cited the Pakistani government (22%) as their first most trusted institution than any other option. About a quarter of Pakistani Internet users selected researchers (28%) or technical experts (25%) as trusted regulators of the Internet. Other governmental bodies such as the prime minister

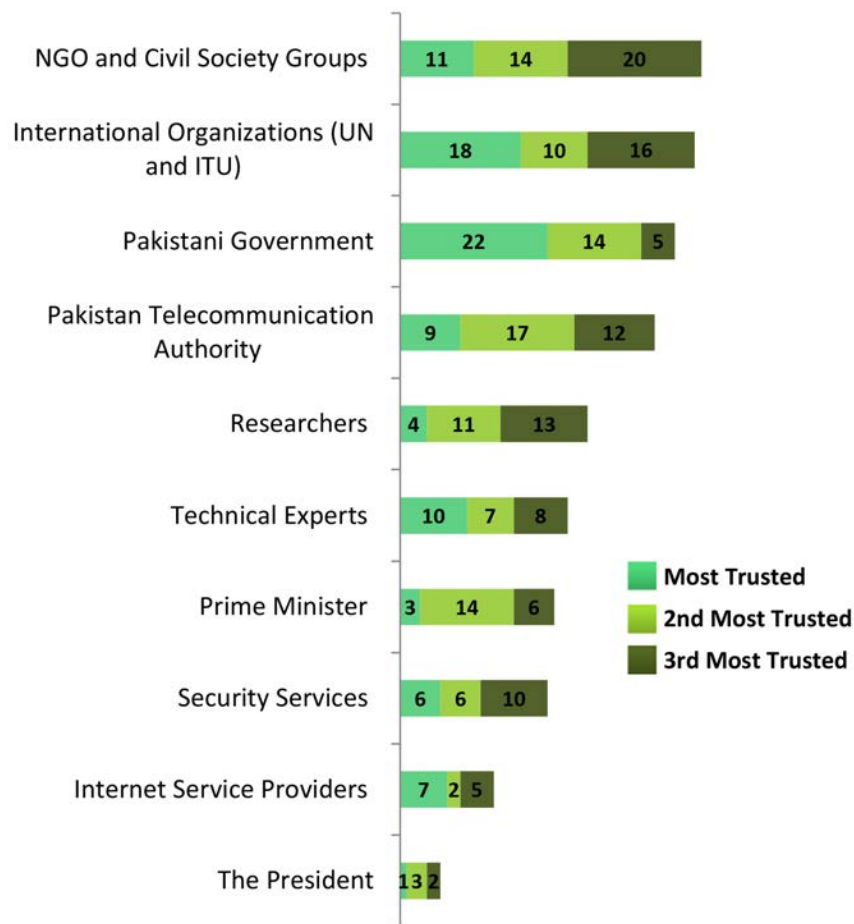


FIGURE 8: MOST TRUSTED INSTITUTIONS & ORGANIZATIONS FOR REGULATING THE INTERNET (percentage of total respondents, multiple responses)

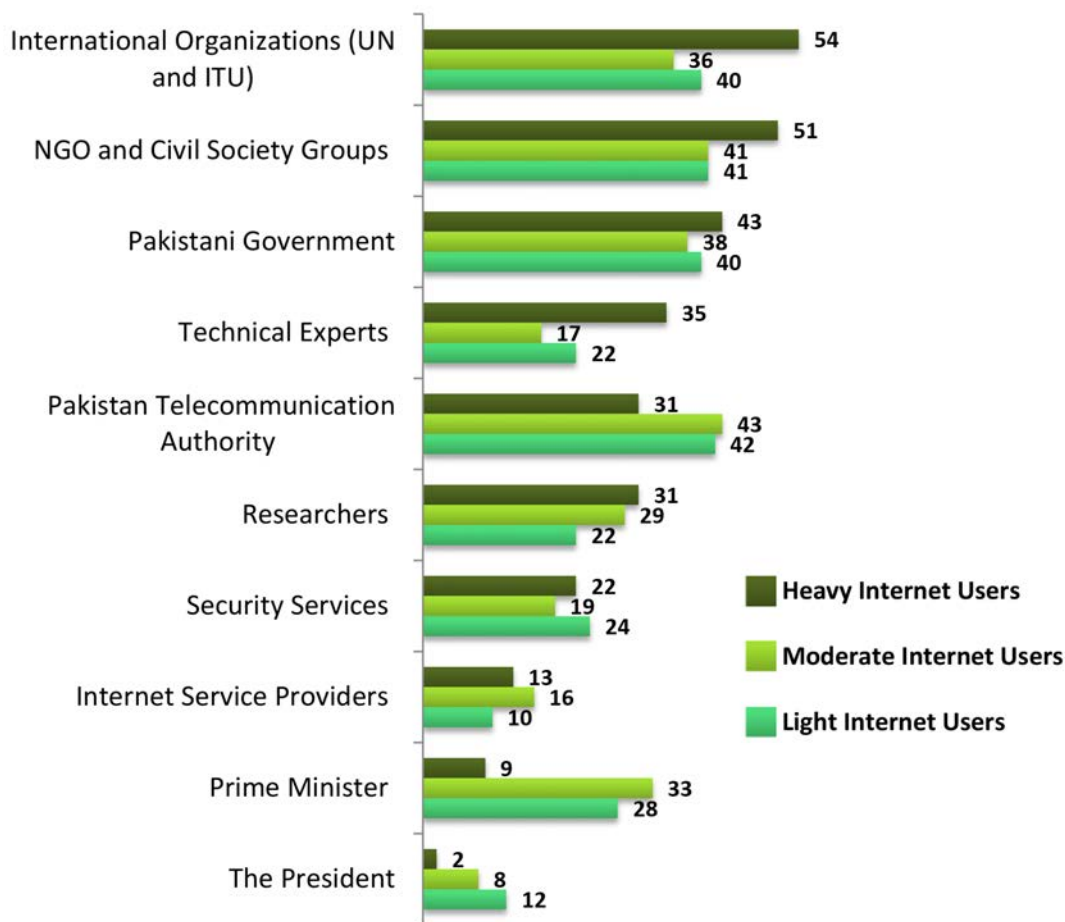


FIGURE 9: TRUSTED INSTITUTIONS & ORGANIZATIONS FOR REGULATING THE INTERNET BY INTERNET USE SEGMENT (percentage of total respondents, multiple responses)

(23% of all Internet users), security services (22%), and the president of Pakistan (6%) were selected by few Pakistani Internet users. Similarly, only 14% of Internet users selected Internet service providers as their most trusted regulators.

The percentage of respondents by Internet use frequency segment who selected each institution or organization as one of their top three most trusted regulators is presented in Figure 9. Heavy Internet users were more likely to trust international organizations such as the UN or ITU (54% vs. 40%) or civil society groups (51% vs. 41%) than light Internet users. In addition, about one third of heavy Internet users selected either technical experts (35%) or researchers (31%) as trusted Internet regulators as compared to about one-fifth of light Internet users (22%) who did the same. Conversely, light internet users were significantly more likely to select the Pakistani Telecommunication Authority (42% vs. 31%) and the prime minister (28% vs. 9%) than heavy Internet users.

Beyond whom they may trust to regulate the Internet, survey respondents were also asked several questions about their beliefs and preferences about regulatory legislation and policy in Pakistan. For instance, Pakistanis were asked whether they believe the government should regulate the Internet more than it currently does, less than it currently does, or maintain the status quo. Overall, the majority of Pakistani Internet users want less regulation (53%) or none at all (7%). About one-quarter (23%) desire more Internet regulation and only 1% want about the same amount. A sizable percentage of respondents answered that they did not know (16%).

However, these preferences varied widely depending on frequency of Internet use. Figure 10 provides the distribution of responses by frequency of Internet use segment. Majorities of heavy (54% and 7%) and moderate (86% and 3%) Internet users desire less or no Internet regulation at all in Pakistan (respectively). In contrast, about half (48%) of light Internet users

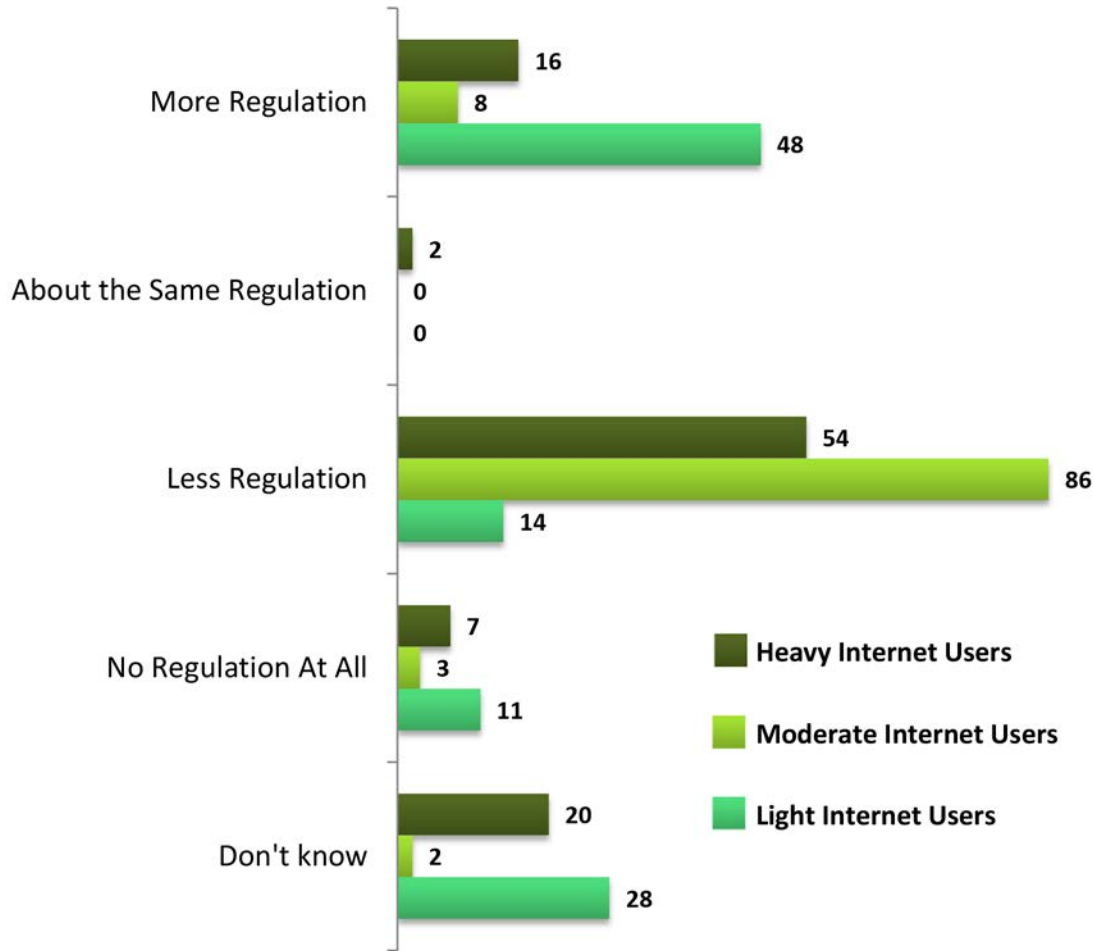


FIGURE 10: PREFERENCE FOR INCREASING, DECREASING, OR MAINTAINING GOVERNMENT REGULATION OF THE INTERNET BY INTERNET USE SEGMENT (percentage of total respondents, single response)

prefer more Internet regulation, though 28% said they did not know their preference.

Respondents were also asked their beliefs about the government’s primary motivation for blocking online content, and whether it was protecting national security, curtailing freedom of expression, protecting the population from blasphemous content, or protecting themselves from criticism. Figure 11 provides the distribution of responses for each response option.

The plurality of Pakistani Internet users (45%) responded that the government’s primary motivation for Internet regulation was to protect itself from criticism while about one-third thought it was to curtail freedom of expression (35%). About one in ten Internet users selected that their primary motivation was to protect the public from blasphemous content (11%) or to protect national security (9%). Interestingly, these perceptions did not vary widely by frequency of Internet use segment.

A second question asked respondents whether they agreed or disagreed with the statement that “The regulation of the Internet affects my personal freedom.” Overall, 79% of Pakistani Internet users agreed with the statement, 9% disagreed, and 12% did not know. This sentiment again varied widely by frequency of Internet use, with 82% of heavy Internet users agreeing compared to 60% of light users. In contrast, 16% of light Internet users disagreed with the statement compared to 1% of heavy users.

Pakistani Internet users were asked more specifically about how much they agree or disagree with eight statements about increased government control over the Internet (e.g. blocking content, control over Internet service providers, etc.) would have on themselves and Pakistan. Figure 12 provides the percentages of respondents that agree, disagree, or neither agree nor disagree with each statement. Large majorities of Pakistani Internet users agree that greater government

control over the Internet would limit their freedom of expression (83%), put limits on the content they access (82%), make them fearful that they are under surveillance (67%), and stifle innovation (62%).

Pakistani users overwhelmingly disagreed that more government control and censorship of the Internet would have no effect (95%), would help make the Internet safe for everyone (83%), and would help society reap more benefits from the Internet (77%). However, on whether greater government control of the Internet would lead the respondent to use the Internet less, Pakistani Internet users were somewhat evenly divided, with 55% agreeing that it would and 42% disagreeing.

However, agreement and disagreement about some of these impacts of greater government control over the Internet did vary substantially by frequency of Internet

use as illustrated in Table 8. For example, 37% of light Internet users agreed that greater government control would put limits on the content they access as compared to 100% of heavy users. Likewise, about one-third (32%) of light Internet users agreed greater controls would make them use the Internet less compared to majorities of moderate (54%) and heavy Internet users (70%). Greater numbers of light Internet users also believed that greater government control would benefit Pakistanis by making the Internet more safe (28%) and reaping more benefits from it (26%) as opposed to heavy Internet users who strongly disagreed with each of these statements (88% and 92%, respectively). However, at the same time, light Internet users (78%) were more likely to agree that increased control and regulation by the Pakistani government over the Internet would make them more fearful of surveillance than heavy Internet users (60%).

The last question posed to respondents about government control of the Internet asked under what circumstances they would or would not support the Pakistani government temporarily shutting down the entire Internet. Overall, 34% of Internet users would support such a shutdown, with the case of a national emergency garnering the most support (30%) followed by 10% believing a temporary shutdown would be justified in the case of a mass protest. In contrast, a majority of Internet users (52%) believe the shutdown of the Internet by the Pakistani government would never be justified no matter the situation. A remaining 8% of respondents said that they did not know.

Figure 13 provides the distribution of responses by frequency of Internet use segment. A majority (52%) of light Internet users and a plurality (45%) of moderate users believe the government shutting down the Internet in the case of a national emergency is justified compared to 5% of heavy Internet users. Another one in five (20%) light Internet users and 12% of moderate users support the government shutting down the Internet due to mass protests with only a very small percentage (2%) of heavy Internet users feeling the same. In contrast, 91% of heavy Internet users, compared to 34% of moderate and 13% of light users, feel a government shutdown of the Internet in Pakistan is never justified.

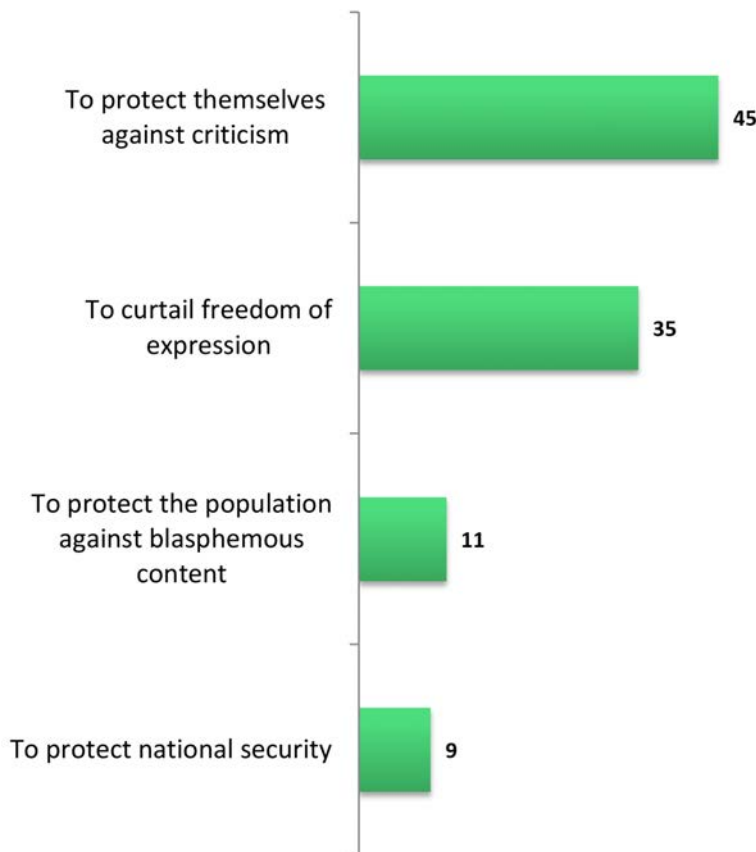


FIGURE 11: PREFERENCE FOR INCREASING, DECREASING, OR MAINTAINING GOVERNMENT REGULATION OF THE INTERNET BY INTERNET USE SEGMENT (percentage of total respondents, single response)

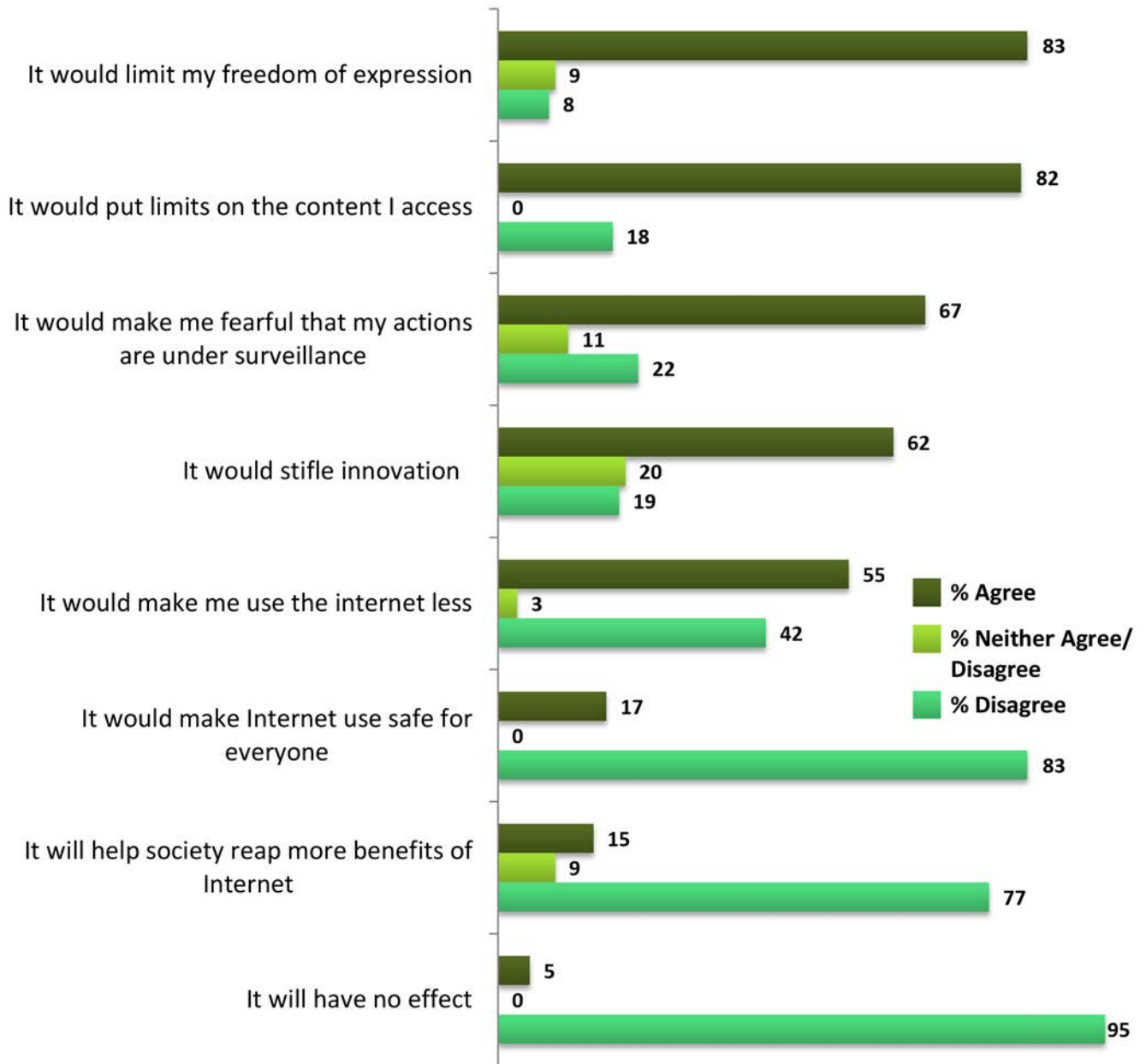


FIGURE 12: PERCEIVED IMPACTS OF GREATER GOVERNMENT CONTROL AND CENSORSHIP OF THE INTERNET (percentage of total respondents, single response)

TABLE 8: PERCEIVED IMPACTS OF GREATER GOVERNMENT CONTROL AND CENSORSHIP OF THE INTERNET BY INTERNET USE SEGMENT

| Statement | Frequency of Internet Use | | | | | |
|---|---------------------------|----------|---------------------|----------|------------------|----------|
| | % of Light Users | | % of Moderate Users | | % of Heavy Users | |
| | Agree | Disagree | Agree | Disagree | Agree | Disagree |
| It would put limits on the content I access | 37 | 63 | 100 | 0 | 100 | 0 |
| It would limit my freedom of expression | 69 | 21 | 88 | 1 | 91 | 2 |
| It would make me use the internet less | 32 | 61 | 54 | 41 | 70 | 30 |
| It would stifle innovation | 62 | 31 | 63 | 32 | 61 | 0 |
| It would make me fearful that my actions are under surveillance | 78 | 13 | 68 | 19 | 60 | 31 |
| It would make Internet use safe for everyone | 28 | 72 | 11 | 89 | 12 | 88 |
| It will have no effect | 9 | 92 | 3 | 97 | 4 | 96 |
| It will help society reap more benefits of Internet | 26 | 59 | 16 | 75 | 3 | 92 |

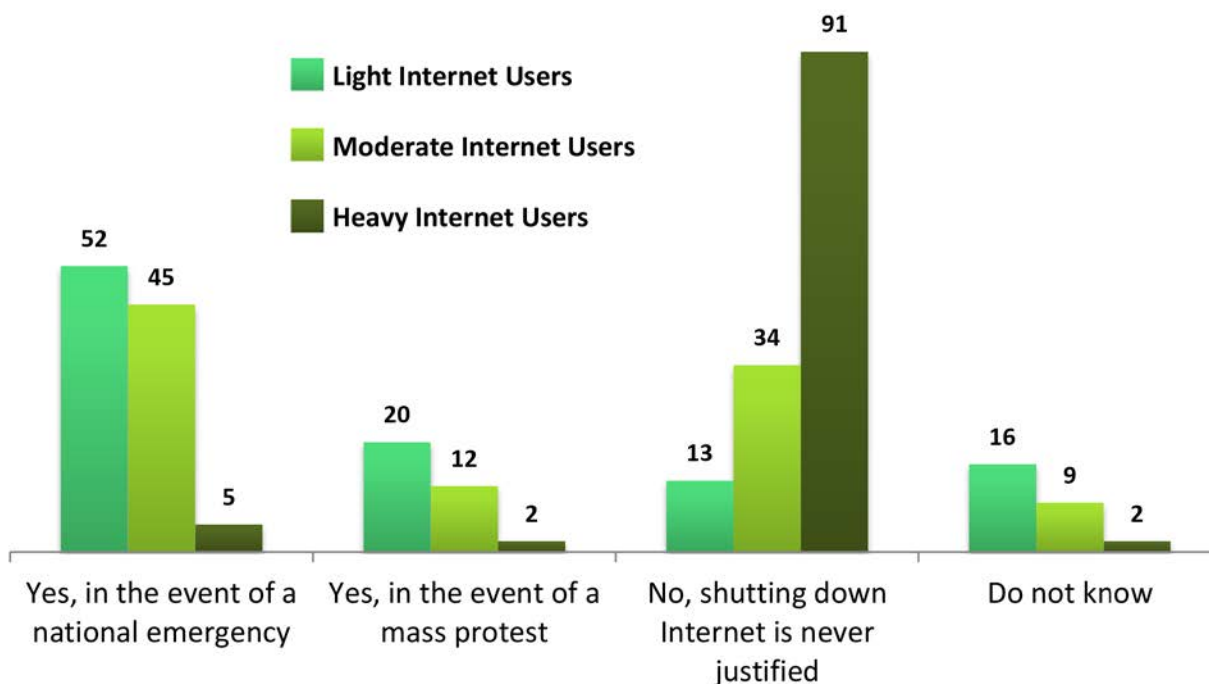


FIGURE 13: SUPPORT FOR PAKISTANI GOVERNMENT TEMPORARILY SHUTTING THE INTERNET BY INTERNET USE SEGMENT (percentage of Internet users, single response)

Pakistani Citizen Mobilization and Protest

Pakistani Internet users were asked two questions about citizen mobilization and protest in furtherance of Internet freedom. First they were asked if there was a possibility of a mass protest or demonstration in their local community against government measures to restrict or censor the Internet. A follow-up question then asked respondents if they would personally take part in such mobilization if it occurred.

Across all respondents, 18% stated a protest against Internet censorship in their community was possible, while 82% said it was not. However, 68% of respondents stated that they would personally take part in such a protest if it occurred, while 32% said they would not. Cross-tabulating the two questions, 56% of Pakistani Internet users believe a protest in their community is unlikely, BUT if one did occur they would participate.

Figure 14 provides the breakdown for these two questions by frequency of Internet use across which there are significant variations in response. Heavy Internet users (37%) are substantially more likely than moderate (4%) or light (7%) users to believe a protest against Internet censorship in their local community is possible. The variation is less stark by frequency of Internet use when respondents are asked if they would personally take part in a protest if it occurred, with majorities in each segment replying they would take part, though the highest percentage was amongst heavy Internet users (75%).

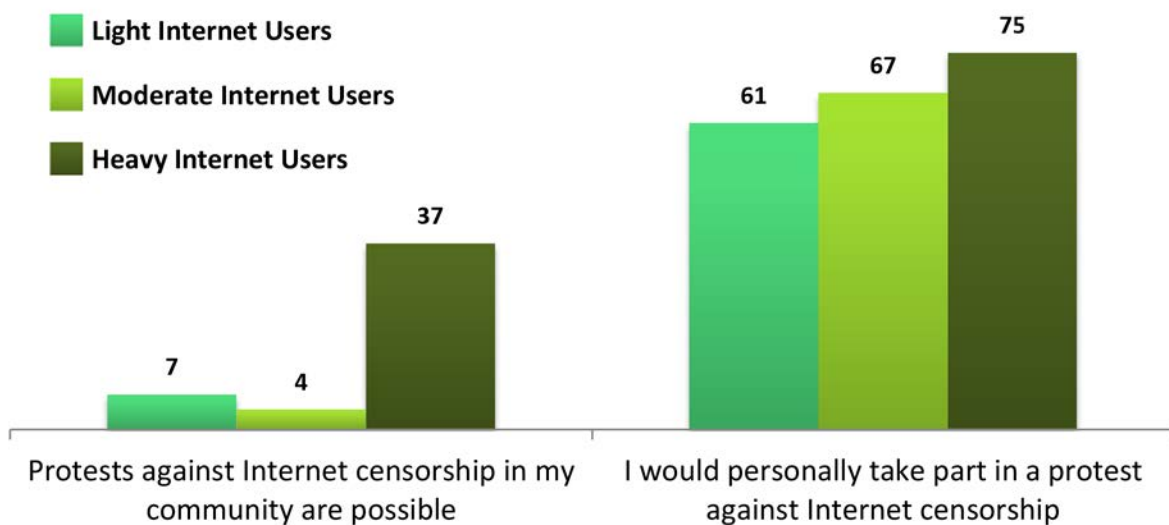


FIGURE 14: BELIEFS ABOUT INTERNET PROTESTS BY FREQUENCY OF INTERNET USE SEGMENTS (percentage of Internet users, single response)

Methodological Notes

The survey population were urban adult Internet users living in the Pakistan (men and women, 18 years or older) residing in five cities located in urban regions (N=500 in each) and five cities located in rural regions (N=250 in each). The ten cities were Quetta, Karachi, Lahore, Islamabad, Peshawar, Swat, Zhob, Sukkur, Gilgit, and Bahawalpur. Face to face surveys were conducted between September 2014 and December 2014 by the research and survey department at Combine Spotlight. The survey was conducted in national language Urdu and Regional Language Pashto. The overall response rate was 78.3% with 3720 surveys completed.