



Customer Satisfaction Tracking Research

July 2026



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Study Objectives



ARIN is a nonprofit member-based organization that: supports the operation of the Internet through the management of Internet number resources throughout its service region; coordinates the development of policies by the community for the management of Internet Protocol number resources; and advances the Internet through information outreach. ARIN is one of five Regional Internet Registries (RIRs) in the world.

Radius (previously Rockbridge Associates) conducted this customer/member satisfaction survey to help ARIN better understand members' satisfaction and needs as the Internet number registry landscape evolves. This study in 2026 serves as a follow up to the studies conducted in 2014, 2017, 2020, and 2023. This study has the following objectives:

- Determine members' expectations and needs from ARIN
- Assess current satisfaction with ARIN's services and operations
- Determine any unmet needs members have
- Identify and prioritize areas for improvement
- Assess current perceptions of the organization within the Internet community
- Identify opportunities to better engage the Internet community in terms of outreach, education and fostering participation
- Understand how ARIN's current performance compares to that indicated by previous surveys completed in 2014, 2017, 2020, and 2023

Background and Methodology



COMPLETES

930
Completed
Surveys

- 487** are Service Members with a direct allocation of Internet number resources from ARIN
- 319** are General Members with a direct allocation of Internet number resources from ARIN
- 80** have a direct allocation of Internet number resources from ARIN but are not under an agreement with ARIN
- 33** have no direct Internet number resources from ARIN but use some ARIN services
- 11** have no direct Internet number resources from ARIN, and do not use ARIN services, but are part of the ARIN community

MARGIN OF ERROR

The margin of error (95% level of confidence) for results based on the total sample is +/- 3%. The margin of error is larger for subgroups of the data.

LOYALTY INDEX

The Loyalty Index is a derived measure that takes into account satisfaction with meeting needs, satisfaction with value, and likelihood to continue with ARIN if given a choice. The three measures factor into the index equally (each accounting for a third). A score of "100" means perfect scores were received for each component of the index.

SAMPLE PROFILE

Compared with prior waves, the 2026 respondent profile is more professionally diverse, with a less tenured workforce and a broader mix of occupations beyond network engineering. Rather than adjusting the sample to mirror previous waves, the results are presented as the best representation of ARIN's community today based on current engagement and available contact channels. As a result, differences versus prior waves should be interpreted in the context of both evolving community perceptions and a broader respondent profile.

ARIN CUSTOMER SATISFACTION AT-A-GLANCE



Online Survey
METHODOLOGY



May 21st to June 22nd , 2026
FIELD DATES



15 minutes
AVERAGE SURVEY TIME

Numbers may not sum exactly due to rounding.

Executive Summary



ARIN remains highly valued, with stronger alignment to expectations, while opportunities to drive loyalty remain to make the member experience simpler, more intuitive, and more responsive.

- The 2026 results reflect a broader and more professionally diverse respondent profile than previous waves, highlighting an evolving ARIN community with increasingly diverse member needs.
- Loyalty remains strong despite softer top-box satisfaction since 2023, with the shift primarily toward moderate rather than low satisfaction.
- Performance versus expectation gaps have narrowed across most dimensions, particularly Policy Development, Engineering, Financial Services, Meetings, Registration Services, and Communications/Outreach. Policy Development now performs almost entirely in line with member expectations, reinforcing it as one of ARIN's strongest and most differentiated capabilities.
- The greatest opportunities to drive loyalty lie in improving operational execution, particularly around responsiveness, information quality, request processes, transparency, and supporting self-governance of registries.
- Engagement continues to broaden across products, programs, and technical services, with growing awareness and adoption of RPKI, IPv6, routing security, and ARIN's educational resources.
- ARIN's reputation remains strong, anchored in reliability, professionalism, openness, and trust. Members increasingly recognize ARIN as an innovative and socially responsible organization, while efficient use of financial resources and responsiveness to community needs remain the strongest drivers of ARIN's overall image and loyalty.

Executive Summary – ARIN Performance Scorecard: Overview

To identify and prioritize areas for improvement, a scorecard approach is used to track ARIN’s perceived performance and expectations among community members on 38 specific attributes grouped into 9 dimensions. Success is defined by the gap between Expectations and Performance, with the goal being to close the gaps over time and come as close as possible to meeting (or exceeding) expectations of community members.

The overall quality gap decreased from 7 points in 2023 to 3 points in 2026. While performance dropped by 8 points, expectations dropped by 11 points, contributing to the smaller gap.**

Since 2023, ARIN has moved closer to meeting community expectations on all service dimensions except Internet Governance and Customer Service.

Customer Service, and Communications & Outreach are key opportunities for improvement in 2026.

						Points From Expectation					
						2026	2023	2020	2017	2014	
Smallest Gaps	Overall	74% 71%	85% 79%	90% 80%	85% 83%	88% 76%	3	7	10*	2	12
	Policy Development	71% 70%	81% 78%	84% 79%	83% 82%	87% 74%	1	4	5	1	13
	Financial Services	76% 74%	91% 86%	90% 84%	88% 86%	93% 83%	2	5	6	2	10
	Engineering	72% 70%	86% 79%	90% 79%	87% 85%	89% 79%	2*	8	11	2	10
	Security	76% 73%	87% 81%	87% 86%	89% 88%		3*	6	1*	1	Not asked
	ARIN Meetings	69% 67%	77% 67%	74% 71%	81% 77%	77% 65%	3	10	3	4	12
	Registration Services	74% 70%	88% 79%	90% 80%	88% 82%	91% 77%	4	8	10*	6	14
	Communications and Outreach	74% 70%	82% 74%	84% 75%	83% 79%	87% 70%	4	9	9*	4	17
	Internet Governance	78% 72%	85% 83%	90% 83%	80% 87%	88% 81%	6	2	7	-7	7
	Customer Service	78% 72%	90% 81%	90% 81%	90% 83%	92% 79%	6	9	9	7	13
		2026	2023	2020	2017	2014					

*Note: attributes within dimension changed between waves and scores are not comparable.
**Gap calculations may differ from numbers in table due to rounding.

Executive Summary – ARIN Performance Scorecard: Opportunities



2026 Key Opportunities

Performance Area	Recommendations for Focus	Points from Expectations
Policy Development	Has a Policy Development Process which creates useful and fair Internet number resource management policy	6 ⓘ
Engineering	- New technical services and enhancements are delivered in a timely manner - Provides tools and user resources that are relevant and useful to me - Tools and resources (such as Whois, WhoWas, DNS, RDAP, IRR, RPKI, etc.) are easy to understand	3 ⓘ 4 ⓘ 6
Security	Provides clear communication about security practices, policies, and updates	6 ⓘ
Registration Services	- Transfer requests are processed in a timely manner - The process to obtain Internet number resources is clear and straightforward	7 9 ⓘ
Communications and Outreach	- Clearly communicates the organization's future plans - Provides training and materials that are useful to me - Is a transparent organization - I am able to easily navigate the website to find the content I need	4 6 8 ⓘ 12
Internet Governance	Supports efforts to keep Internet number registries self-governed, as defined by the needs of their respective communities	8 ⓘ
Customer Service	- Has the right people for the job on staff - Staff interacts effectively with customers and members - Provides clear and accurate information to customers and members - Provides timely responses to requests	4 ⓘ 6 10 ⓘ 11 ⓘ

ⓘ denotes relative high importance

Recommendations



1. Design for a broad member community

The 2026 respondent profile is more professionally diverse and less tenured than previous waves, suggesting ARIN is engaging a broader community. Continue tailoring communications, navigation, and educational resources to meet the needs of members with varying roles, experience levels, and technical expertise.

2. Reduce friction in the member experience

Perceptions of ARIN as bureaucratic have increased, while the highest-impact opportunities for driving loyalty continue to focus on operational execution (as in 2023), including more responsive customer service, accurate information, clearer request processes, transparency, and supporting self-governance of registries. Continue improving the consistency, clarity, and responsiveness of the member experience across these high-impact touchpoints.

3. Strengthen engineering capabilities and technical enablement

Growing awareness and adoption of RPKI, IPv6, routing security, and newer services make engineering capabilities increasingly important to member perceptions. Continue improving tool usability, relevant resources, and timely technical enhancements (which are also key opportunities to drive loyalty) to reinforce ARIN's value.

4. Better communicate ARIN's value and impact

Members increasingly recognize ARIN as an innovative and socially responsible organization, yet efficient use of financial resources and responsiveness to community needs remain the strongest drivers of image and loyalty. Continue demonstrating how ARIN delivers value, invests resources, and responds to community priorities through clear, evidence-based communication.

5. Build on ARIN's strongest asset: member trust

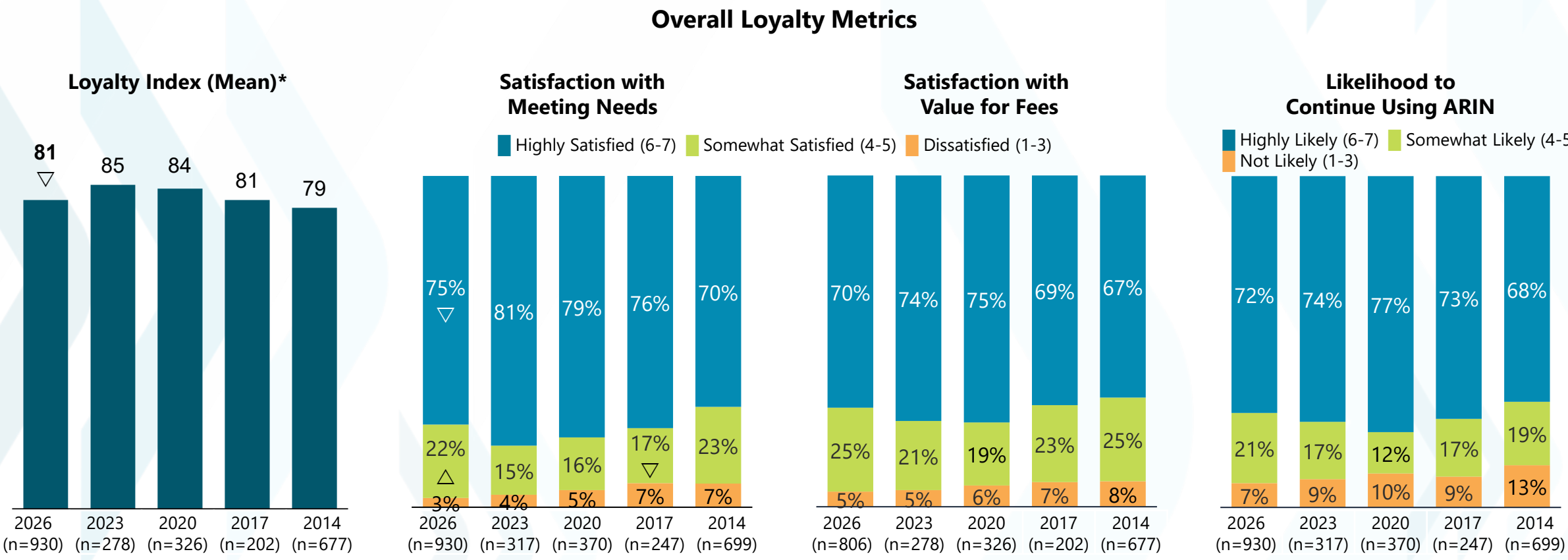
Despite softer satisfaction scores, loyalty remains high, and members consistently describe ARIN as reliable, professional, transparent, and community driven. Continue reinforcing these values through member communications alongside key strength areas such as policy development, while reducing areas of friction to sustain long-term confidence and engagement.



Satisfaction and Loyalty

Loyalty remains strong despite modest softening in top-box satisfaction ratings

- Top-box satisfaction with meeting needs, value for fees, and likelihood to continue using ARIN has softened since 2023, largely reflecting a shift toward moderate rather than low ratings.
- Overall loyalty remains strong, with the Loyalty Index easing from its 2023 peak but remaining stable against 2017 and 2014 levels.

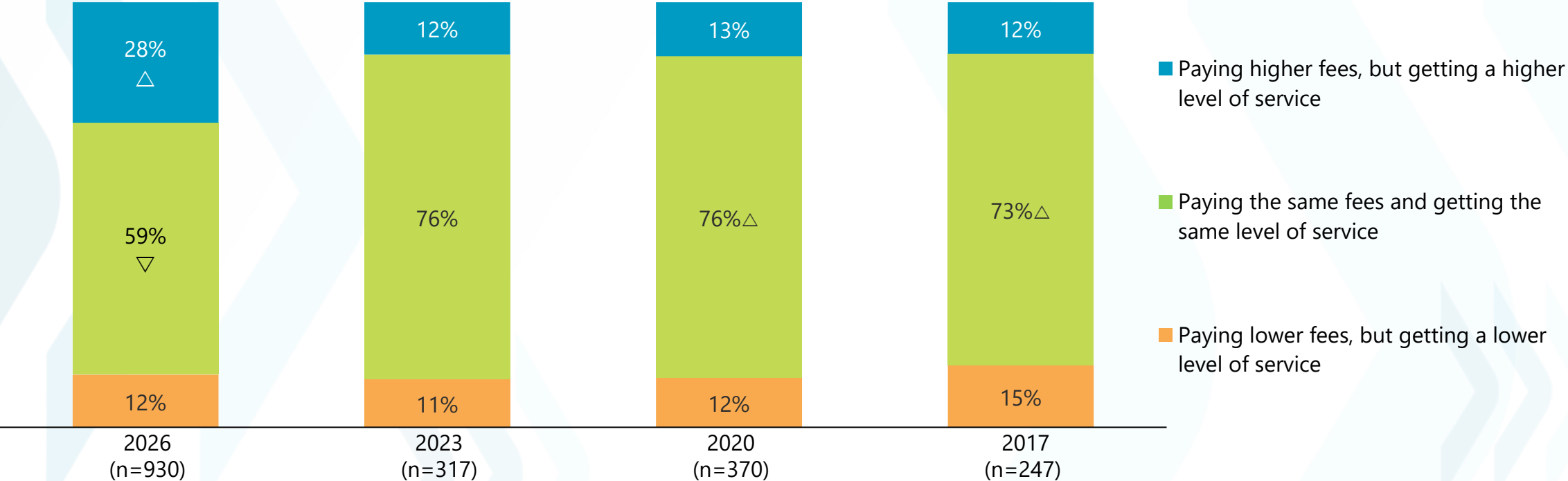


Most prefer fee stability, but interest in premium service has grown



- Most community members continue to prefer the same fees for the same level of service, but interest in paying more for enhanced service has increased significantly since 2023.
- Interest in higher fees for better service is strongest among Service members (31%) , those without a current ARIN agreement (34%), and organizations with fewer than 1,000 employees (29% to 34%).

ARIN’s Fees and Level of Service



Question Added in 2017 | [▽][△] denotes significantly higher/lower than previous phase
Q20. Thinking about the fees ARIN charges and the level of service it provides, if you had to choose, would you prefer:

Satisfaction is driven by dependable services and responsive support, while dissatisfaction centers on cost, complexity, and innovation



- High satisfaction is driven by reliable core services, knowledgeable and responsive staff, and consistently smooth support experiences.
- Lower satisfaction reflects concerns about cost, complex processes, and slower innovation, with some questioning whether ARIN's services are keeping pace with operational needs.



Reasons for High Overall Satisfaction

(6 or 7 on 7-point Satisfaction Scale)

"ARIN provides the tools, support, and expertise organizations need to manage Internet resources efficiently and stay connected." – Rated Overall Satisfaction 6

"My recent request to transfer a number resource that was acquired in a corporate merger was about as smooth and straightforward a transaction as I've ever had. Well done." – Rated Overall Satisfaction 7

"Anytime that I had to contact or interact with an ARIN representative, it has always been a good positive experience in answering the question or helping to resolve the situation." – Rated Overall Satisfaction 6

"Core services (IP and ASN assignment, RPKI, routing registry) are very reliable, the support is good and generally responsive and knowledgeable. A stable system and you can depend on them." – Rated Overall Satisfaction 6



Reasons for Low Overall Satisfaction

(1–3* on 7-point Satisfaction Scale)

"ARIN is expensive and doesn't even provide basic functionality and research as compared to the other RIRs. First and foremost, ARIN is a club of lawyers and not an engineering organization." – Rated Overall Satisfaction 1

"The adoption of privacy rules has made abuse increasingly difficult when doing Whois lookups, the POC system is convoluted and difficult to navigate or understand." – Rated Overall Satisfaction 3

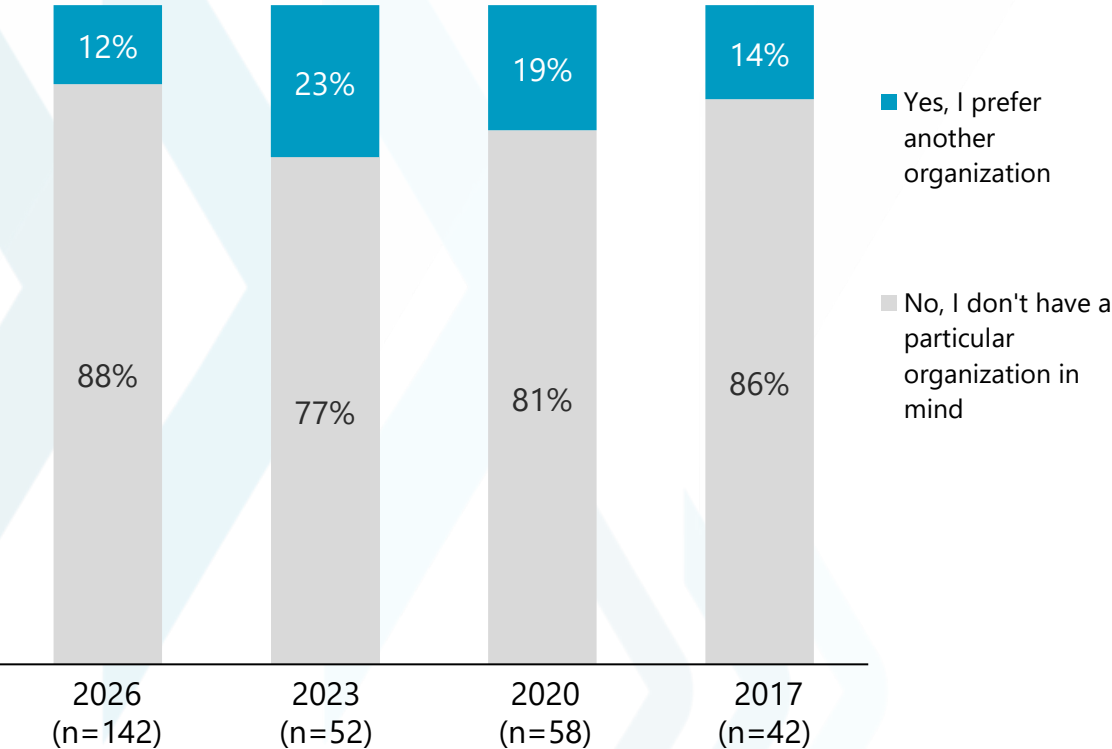
"ARIN has shown little initiative in developing services that address our organization's specific operational needs. Enhancements feels generic and slow to arrive." – Rated Overall Satisfaction 1

Switching intent remains low, but those who prefer another organization cite lower cost, greater flexibility, and better functionality

- Even among lower-loyalty respondents, nearly 9 in 10 do not have another registry in mind, up from 77% in 2023.
- Among the small minority who prefer another organization, most cite lower costs, less bureaucracy, stronger technical capabilities, and faster service.

Preferred Organizations over ARIN

(Among those who rated likelihood to continue using ARIN less than a 5 on a 7-point scale)



Reasons for Preferring Other Organization over ARIN

(Among those who had a particular organization in mind)

"The RIR system is antiquated and outdated. It lacks providing real commercial interests. There is no accountability. Fees are wasted on travel. Organizations are inconsistent and difficult to work with." – Preferred Organization: Not Provided

"My concerns were shared with Cogent about the denial from ARIN and they immediately offered the IP space I originally requested, and for a lower price." – Preferred Organization: Cogent

"They have functional IRR tools, working RPKI, RPKI Trust Anchors that don't require signing a contract, functional LIR services, and support for individual number resource registration. RIPE is a registry for humans to get stuff done. ARIN is a registry for lawyers to extract their money." – Preferred Organization: RIPE

▽△ denotes significantly higher/lower than previous phase
Q3a. Is there a particular organization you would prefer to use for registry services in place of ARIN? | Q3b. Why would you prefer to use [INSERT RESPONSE FROM Q3a] instead of ARIN?

Organizations want ARIN to simplify core services while expanding practical technical support

- Organizations primarily want ARIN to simplify and modernize core services through faster support, clearer guidance, improved ARIN Online functionality, and streamlined processes.
- When asked about additional services, respondents most often request practical technical training, particularly around IPv6, RPKI, and routing security, alongside greater automation and self-service management tools.



How ARIN Can Better Serve Organization in Specific Countries

"Provide more valuable training (much like other IRRs), and more services such as monitoring like RIPE."

"ARIN could better serve organizations by improving response times and making support more accessible, especially for smaller teams that may not be as familiar with the processes."

"A few organizations within the education sector seem not to have a good understanding of ROA and RPKI. ARIN can help by providing information videos and guides."

"Offer more practical guidance, improve navigation of resources, and make support channels easier to access."



Additional Services ARIN Could Offer to Benefit Companies

"Think about workshops or training activities that would enlighten the ARIN community about the possibilities of implementing IPv6-mostly and IPv6-Only. The LASCNIC 45 meeting had some very interesting presentations/discussions/labs/tutorials around these subjects that were very informative and beneficial in outlining reasons to move toward IPv6 and away from legacy IP networking."

"ARIN could offer additional IPv6-focused training, workshops, and certification programs tailored to small organizations and educational institutions. Resources that simplify IPv6 deployment, security, and troubleshooting would help organizations accelerate adoption and build internal expertise."

"While ARIN excels at the core database and cryptographic registry layer, expanding into operational support, integration tools, and security validation would bridge the gap between regulatory record-keeping and active day-to-day network operations."



Performance and Expectations

Overview of How Performance and Expectation are Measured



A scorecard was developed by capturing perceived performance and expectation on 38[^] specific attributes grouped into 9 dimensions:

- Policy Development (6)
- Registration Services (4)
- Engineering (6)
- Financial Services (2)
- Communications/Outreach (7)
- ARIN Meetings (3)
- Customer Service (5)
- Internet Governance (2)
- Security (3)

Across all items, community members were asked two questions:

1. **Performance:** How well does this describe ARIN? (Scale of 1 to 10)
 2. **Expectation:** How well does this describe an “excellent” Internet Number Registry organization? (Scale of 1 to 10)*
- Actual success is defined as the gap between Expectation and Performance. In the long run, ARIN should focus on closing gaps to come as close as possible to (or even exceeding) expectations of community members.
 - In its planning, ARIN should focus on gaps on individual items as well as the aggregate for each of the 9 dimensions.
 - The following pages report the scorecard results, starting with the high-level view across the 9 dimensions.

*Community members were asked to rate their expectations for only a third of the attributes, which allowed for a sufficient sample without overburdening the respondent.

[^]5 new attributes were added, 2 to Engineering and 3 to Security, and 1 attribute, from Security, was removed from 2023's wave.

The gap between expectation and performance of ARIN against all measured dimensions has narrowed, despite softer overall ratings

- Performance and expectations have both softened since 2023, but performance gaps have narrowed across all measured dimensions, suggesting ARIN is closer to meeting community expectations even as absolute scores are lower.
- This may partly reflect the more engaged and technically focused 2026 respondent profile, while Policy Development remains ARIN’s strongest-performing area relative to expectations as seen in 2023.



Overall (1 of 2) Performance and Expectations
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

						Points From Expectation				
						2026	2023	2020	2017	2014
Overall	74%	85%	90%	85%	88%	3	7	10*	2	12
	71%	79%	80%	83%	76%					
Policy Development	71%	81%	84%	83%	87%	1	4	5	1	13
	70%	78%	79%	82%	74%					
Financial Services	76%	91%	90%	88%	93%	2	5	6	2	10
	74%	86%	84%	86%	83%					
Engineering	72%	86%	90%	87%	89%	2*	8	11	2	10
	70%	79%	79%	85%	79%					
Security	76%	87%	87%	89%		3*	6	1*	1	Not asked
	73%	81%	86%	88%						

Q4. The following is a list of features you may expect from ARIN or a professional organization with a similar purpose. For each feature below, please provide two ratings: 1) ARIN’s performance: rate how well each feature describes ARIN, 2) Your expectation: rate how well each feature describes an “excellent organization” with the same mission as ARIN. | Dashed lines show expectations | *Note: attributes within dimension changed and score are not fully comparable.

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Most remaining dimensions are closer to expectations, but Internet Governance and Customer Service remain watch-outs

- Gaps have narrowed across most of the remaining dimensions since 2023, with ARIN Meetings, Registration Services, and Communications and Outreach moving closer to expectations.
- Internet Governance is the exception, with its gap widening since 2023 and, together with Customer Service, representing the largest remaining gap.



Overall (2 of 2) Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

Points From Expectation

						2026	2023	2020	2017	2014
Overall	74%	85%	90%	85%	88%	3	7	10*	2	12
	71%	79%	80%	83%	76%					
ARIN Meetings	69%	77%	74%	81%	77%	3	10	3	4	12
	67%	67%	71%	77%	65%					
Registration Services	74%	88%	90%	88%	91%	4	8	10*	6	14
	70%	79%	80%	82%	77%					
Communications and Outreach	74%	82%	84%	83%	87%	4	9	9*	4	17
	70%	74%	75%	79%	70%					
Internet Governance	78%	85%	90%	80%	88%	6	2	7	-7	7
	72%	83%	83%	87%	81%					
Customer Service	78%	90%	90%	90%	92%	6	9	9	7	13
	72%	81%	81%	83%	79%					

Q4. The following is a list of features you may expect from ARIN or a professional organization with a similar purpose. For each feature below, please provide two ratings: 1) ARIN's performance: rate how well each feature describes ARIN, 2) Your expectation: rate how well each feature describes an "excellent organization" with the same mission as ARIN. | Dashed lines show expectations | *Note: attributes within dimension changed and score are not fully comparable.

Policy Development remains a key strength, led by policy adherence and Board oversight

- Policy Development remains ARIN’s strongest-performing dimension, with the gap to expectations narrowing from 4 points in 2023 to just 1 point in 2026.
- Policy adherence and Board oversight are strengths in the quadrant analysis, while openness and accessibility now exceeds expectations, reinforcing Policy Development as a relative strength for ARIN.



ARIN Policy Development (1 of 2) Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

ARIN Policy Development (1 of 2) Performance and Expectations						Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)						2026	2023	2020	2017	2014
Overall ARIN Policy Development	71%	81%	84%	83%	87%	1	4	5	1	13
	70%	78%	79%	82%	74%					
Policy Development Process allows any interested individual to participate	68%	80%	80%	86%	89%	-2	2	1	6	18
	70%	78%	79%	80%	71%					
Implements policy adhering to the community-developed and Board ratified policies, as they appear in the Number Resource Policy Manual	72%	81%	89%	83%	85%	0	-4	4	-5	4
	72%	85%	85%	88%	81%					
The Board is effective in their oversight of the Policy Development Process	72%	85%	85%	82%	90%	1	6	7	0	14
	71%	79%	78%	82%	76%					

Perceptions of the development process’s management responsiveness to industry changes have improved substantially since 2023 and is a key strength

- The remaining opportunity for policy development lies in the outcomes it produces, with the largest gap relating to creating useful and fair Internet number resource management policy.



ARIN Policy Development (2 of 2) Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

ARIN Policy Development (2 of 2) Performance and Expectations						Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)						2026	2023	2020	2017	2014
Overall ARIN Policy Development	71%	81%	84%	83%	87%	1	4	5	1	13
	70%	78%	79%	82%	74%					
The Advisory Council is effective in its role facilitating the Policy Development Process	69%	77%	79%	76%	83%	1	0	1	-5	10
	68%	77%	78%	81%	73%					
Policy Development Process allows policies to change quickly enough in response to changes in the industry	68%	78%	83%	83%	85%	1	8	10	5	16
	67%	70%	73%	78%	69%					
Has a Policy Development Process which creates useful and fair Internet number resource management policy	78%	88%	87%	87%	90%	6	10	9	5	15
	72%	78%	78%	82%	75%					

Financial Services is now closely aligned with expectations

- Financial Services continues to perform close to community expectations, with the overall gap narrowing from 5 points in 2023 to 2 points in 2026.
- Billing response timeliness, which is a key strength, and clarity of invoicing/payment procedures are now closely aligned with expectations, reinforcing Financial Services as a lower-priority concern.

ARIN Financial Services Performance and Expectations						Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)						2026	2023	2020	2017	2014
Overall ARIN Financial Services	76%	91%	90%	88%	93%	2	5	6	2	10
	74%	86%	84%	86%	83%					
Provides timely and appropriate responses for billing and administration inquiries	77%	90%	89%	91%	93%	2	3	5	5	9
	75%	86%	83%	86%	84%					
Invoicing and payment processing procedures are explained clearly	76%	92%	92%	86%	93%	2	7	6	0	12
	74%	85%	86%	86%	81%					

Q4. The following is a list of features you may expect from ARIN or a professional organization with a similar purpose. For each feature below, please provide two ratings: 1) ARIN's performance: rate how well each feature describes ARIN, 2) Your expectation: rate how well each feature describes an "excellent organization" with the same mission as ARIN. | Dashed lines show expectations |  denotes a strength

Engineering is now largely meeting expectations across its core capabilities

- Engineering has moved much closer to community expectations, with the overall performance gap narrowing from 8 points in 2023 to just 2 points in 2026, though response codes have changed this wave so treat comparison with caution.
- Technical quality and reliability now fully meets expectations and is a key strength, while new measures show RPKI services slightly exceed expectations, and new service development is closely aligned with member needs and is a strength.

ARIN Engineering (1 of 2) Performance and Expectations						Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)						2026	2023	2020	2017	2014
Overall ARIN Engineering	72%	86%	90%	87%	89%	2	8	11	2	10
	70%	79%	79%	85%	79%					
RPKI services and enhancements are effective in meeting my organization's needs**	68%					-1	Not Asked	Not Asked	Not Asked	Not Asked
Technical services operate at a high level of quality and reliability	76%	91%	94%	90%	92%	0	1	8	-2	7
	76%	90%	86%	92%	85%					
Develops new services and enhancements that align with my organization's needs**	70%					2	Not Asked	Not Asked	Not Asked	Not Asked
	68%									

Engineering improvements are strongest in technical delivery, with timeliness and relevance being key opportunities

- Timely delivery of new technical services and enhancements has improved substantially since 2023, with the gap narrowing from 9 points to 3 points, and is an opportunity to develop further alongside relevance, which has also improved since last wave.
- The largest remaining gap is making ARIN's tools and resources easier to understand, though this has also narrowed since 2023 and is not a key opportunity to improve.

ARIN Engineering (2 of 2) Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

ARIN Engineering (2 of 2) Performance and Expectations						Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)						2026	2023	2020	2017	2014
Overall ARIN Engineering	72%	86%	90%	87%	89%	2	8	11	2	10
	70%	79%	79%	85%	79%					
! New technical services and enhancements are delivered in a timely manner	72%	81%	86%	82%	85%	3	9	12	1	15
	69%	72%	73%	81%	70%					
! Provides tools and user resources that are relevant and useful to me	74%	83%	90%	88%	88%	4	6	11	2	10
	70%	77%	78%	86%	78%					
Tools and resources (such as Whois, WhoWas, DNS, RDAP, IRR, RPKI, etc.) are easy to understand	73%	90%	90%	89%	92%	6	13	13	9	10
	67%	77%	77%	80%	82%					

Security is largely meeting expectations and is a strength, with communication the opportunity

- New security measures suggest ARIN's safeguards and SOC 2 program are closely aligned with community expectations and are key strengths.
- The opportunity is clearer communication about security practices, policies, and updates, where expectations outpace performance by 6 points.



ARIN Security Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

ARIN Security Performance and Expectations					Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)					2026	2023	2020	2017	2014
Overall ARIN Security	76%	87%	87%	89%	3*	6	1*	1	Not asked
	73%	81%	86%	88%					
 Demonstrates strong security practices and safeguards for its services and data**	76%				0	Not asked	Not asked	Not asked	Not asked
	76%								
 The SOC 2 program provides sufficient assurance to my organization that its services and data are secure**	74%				3	Not asked	Not asked	Not asked	Not asked
	71%								
 Provides clear communication about security practices, policies, and updates**	78%				6	Not asked	Not asked	Not asked	Not asked
	72%								

ARIN Meetings have moved much closer to expectations, led by improvements in the election process



- ARIN Meetings has moved much closer to community expectations, with the overall gap narrowing from 10 points in 2023 to just 3 points in 2026.
- The largest improvements are in the Board and Advisory Council election process, while meeting content remains the primary opportunity despite improving substantially since 2023.



ARIN Meetings Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

						Points From Expectation				
						2026	2023	2020	2017	2014
Overall ARIN Meetings	69%	77%	74%	81%	77%	3	10	3	4	12
	67%	67%	71%	77%	65%					
Election process for the Board and Advisory Council is clear and transparent	70%	78%	83%	91%	82%	1	6	6	10	8
	69%	71%	77%	81%	74%					
The content and activities of meetings are at a level of importance and interest that I want to attend	66%	69%	64%	73%	67%	3	10	3	2	14
	63%	59%	61%	71%	53%					
Election process is easy to understand and use by eligible voters	71%	84%	76%	80%	81%	3	13	2	0	13
	68%	72%	74%	80%	68%					

Registration Services is closer to expectations, with key opportunity to develop resource clarity

- Registration Services has moved closer to community expectations since 2023, with the overall gap narrowing from 8 points to 4 points.
- Policy adherence now exceeds expectations and timeliness of resource requests is a strength. The clarity of obtaining Internet number resources is the largest improvement opportunity.



ARIN Registration Services Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

ARIN Registration Services Performance and Expectations						Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)						2026	2023	2020	2017	2014
Overall ARIN Registration Services	74%	88%	90%	88%	91%	4	8	10*	6*	14*
	70%	79%	80%	82%	77%					
The Registration Services Department adheres to policies published in the Number Resource Policy Manual	70%	93%	92%	91%	92%	-3	7	6	3	2
	73%	86%	86%	88%	90%					
Resource requests are processed in a timely manner	72%	86%	92%	83%	95%	1	6	12	-1	15
	71%	80%	80%	84%	80%					
Transfer requests are processed in a timely manner	76%	89%	86%	91%	92%	7	11	7	11	17
	69%	78%	79%	80%	75%					
The process to obtain Internet number resources is clear and straightforward	77%	83%	91%	83%	89%	9	9	17	8	24
	68%	73%	74%	75%	65%					

Q4. The following is a list of features you may expect from ARIN or a professional organization with a similar purpose. For each feature below, please provide two ratings: 1) ARIN's performance: rate how well each feature describes ARIN, 2) Your expectation: rate how well each feature describes an "excellent organization" with the same mission as ARIN. | Dashed lines show expectations | *Note: attributes within dimension changed and score are not fully comparable. | denotes a strength | denotes an opportunity

Communications and Outreach has moved much closer to expectations, led by more effective member communications which is a strength

- Communications and Outreach has moved significantly closer to community expectations since 2023, with the overall gap narrowing from 9 points to 4 points.
- ARIN now exceeds expectations in communicating in ways that meet members' needs and providing feedback opportunities is a strength. Communication of future plans remains the largest gap despite meaningful improvement since 2023.

ARIN Comms/Outreach (1 of 2) Performance and Expectations						Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)						2026	2023	2020	2017	2014
Overall ARIN Communications and Outreach						4	9	9*	4*	17*
	Communicates in a way that meets my needs	74%	82%	84%	83%	-1	8	12	7	16
		70%	74%	75%	79%					
	Offers sufficient opportunities to obtain customer and member feedback	73%	86%	91%	88%	1	9	2	-3	16
		72%	76%	81%	78%					
	Clearly communicates the organization's activities (meetings, elections, etc.)	74%	82%	87%	87%	2	6	10	5	9
		72%	76%	77%	82%					
	Clearly communicates the organization's future plans	70%	79%	76%	79%	4	10	8	5	17
		66%	70%	67%	74%					



-
- | | | |
|-----------------|--------------|------|
| Dark Blue | Dark Red | 2026 |
| Medium Blue | Red | 2023 |
| Light Blue | Orange | 2020 |
| Very Light Blue | Light Orange | 2017 |
| White | White | 2014 |

Points From Expectation

2026	2023	2020	2017	2014
------	------	------	------	------



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Internet Governance is the only dimension moving further from community expectations, driven by perceptions of support for self-governance

- Internet Governance is the only dimension where the gap to community expectations has widened since 2023, increasing from 2 points to 6 points overall.
- The decline is driven by lower perceptions that ARIN supports self-governance across Internet number registries (gap: from 1 to 8 points) which is a key opportunity to improve. Perceptions of ARIN's active role in Internet governance remain relatively close to expectations.

ARIN Internet Governance Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

						Points From Expectation				
						2026	2023	2020	2017	2014
Overall ARIN Internet Governance	78%	85%	90%	80%	88%	6	2	7	-7	7
	72%	83%	83%	87%	81%					
Takes an active role in Internet governance	74%	85%	88%	76%	86%	2	2	6	-10	8
	72%	83%	82%	86%	78%					
Supports efforts to keep Internet number registries self-governed, as defined by the needs of their respective communities	81%	85%	92%	84%	90%	8	1	7	-3	6
	73%	83%	85%	87%	84%					



Customer Service is moving closer to expectations, though staff expertise, timely responses, and clear communication remain key opportunities

- Customer Service has moved closer to community expectations since 2023, driven by stronger perceptions of staff expertise (although still an opportunity to improve), and effective issue resolution.
- The key opportunities to improve are timely responses to requests, and providing clear/accurate information, which continue to have the widest gaps to expectations (11 and 10 points, respectively).



ARIN Customer Service Performance and Expectations

% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

ARIN Customer Service Performance and Expectations						Points From Expectation				
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)						2026	2023	2020	2017	2014
Overall ARIN Customer Service	78%	90%	90%	90%	92%	6	9	9	7	13
	72%	81%	81%	83%	79%					
Staff works with customers to resolve complex issues	74%	88%	88%	90%	94%	3	7	9	5	17
	71%	81%	80%	85%	77%					
! Has the right people for the job on staff	75%	91%	89%	88%	91%	4	8	3	4	10
	71%	83%	86%	84%	81%					
Staff interacts effectively with customers and members	75%	88%	88%	90%	89%	6	7	7	6	10
	69%	81%	81%	84%	79%					
! Provides clear and accurate information to customers and members	83%	90%	90%	86%	92%	10	12	10	3	16
	73%	78%	80%	83%	76%					
! Provides timely responses to requests	83%	94%	94%	97%	95%	11	9	15	16	14
	72%	84%	79%	81%	81%					

Q4. The following is a list of features you may expect from ARIN or a professional organization with a similar purpose. For each feature below, please provide two ratings: 1) ARIN's performance: rate how well each feature describes ARIN, 2) Your expectation: rate how well each feature describes an "excellent organization" with the same mission as ARIN. | Dashed lines show expectations | ! denotes an opportunity

Identifying Priorities: How to Read Quadrants



The quadrant map on the following slide is divided into four areas:

A quadrant map classifies different performance attributes by their level of priority. Each of the 38 attributes is plotted by:

- (a) its importance in driving overall loyalty, and
- (b) by the size of the performance gap.
- Importance was derived statistically based on how well an attribute explains the mean loyalty index (average of satisfaction with meeting needs, satisfaction with value, and likelihood to continue using ARIN)
- Attributes in the same performance dimension are indicated by their marker colors

Strengths

(High Importance and Small Gap)

These areas define the ARIN's current added value

Opportunities

(High Importance and Large Gap)

These areas should be the top focus to improve satisfaction and loyalty

Secondary Strengths

(Lower Importance and Small Gap)

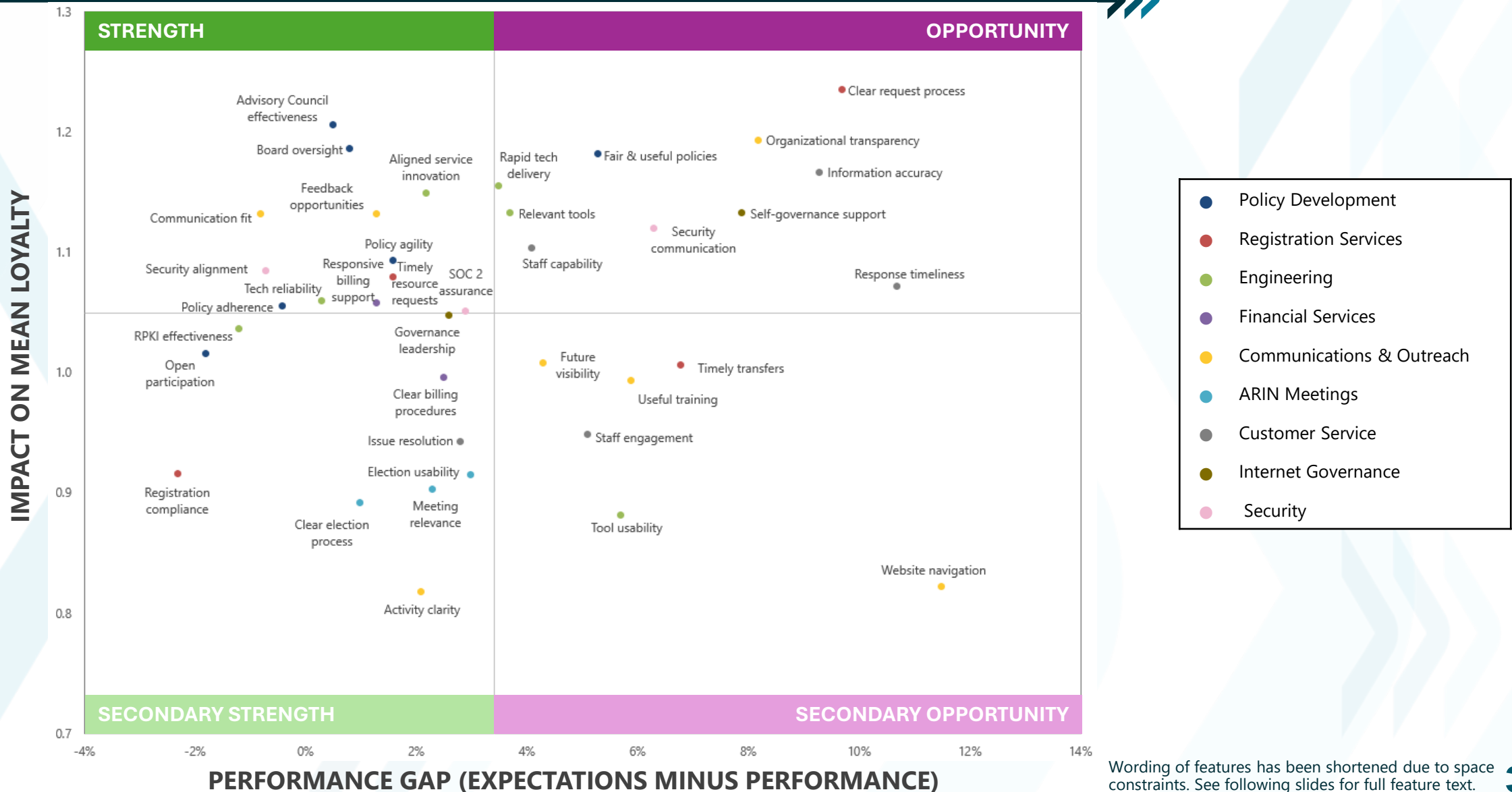
These strengths could be leveraged to shore up loyalty

Secondary Opportunities

(Lower Importance but Large Gap)

these areas could be problems if not addressed, but are not priorities

Policy development continues to drive loyalty, while improving operational execution, notably request processes and transparency, represents the greatest opportunity



Communicating in ways that meet member needs and providing feedback opportunities have shifted from opportunities to strengths since 2023, while relevant tools and self-governance support have become higher priority opportunities

Quadrant Change Summary

Quadrant Change Summary	STRENGTH	● Provides timely and appropriate responses for billing and administration inquiries ○ Implements policy adhering to the community-developed and Board ratified policies ● Communicates in a way that meets my needs ○ Policy Development Process allows policies to change quickly enough ○ Resource requests are processed in a timely manner ○ Advisory Council effectively facilitates Policy Process ● The Board is effective in their oversight of the Policy Development Process ● Technical services operate at a high level of quality and reliability ● Offers sufficient opportunities to obtain customer and member feedback ○ Develops new services and enhancements that align with my organization's needs (new in 2026) ○ Demonstrates strong security practices and safeguards for its services and data (new in 2026) ○ SOC 2 program provides sufficient assurance to my organization that its services and data are secure (new in 2026)	OPPORTUNITY
	SECONDARY STRENGTH	● The content and activities of meetings are at a level of importance and interest that I want to attend ○ Policy Development Process allows any interested individual to participate ● Staff works with customers to resolve complex issues ○ RPKI services and enhancements are effective in meeting my organization's needs (new in 2026) ○ Election process for the Board and Advisory Council is clear and transparent ○ Clearly communicates the organization's activities ○ The Registration Services Department adheres to policies published in the Number Resource Policy Manual ○ Invoicing and payment processing procedures are explained clearly ○ Takes an active role in Internet governance ● Election process is easy to understand and use by eligible voters	● Provides tools and user resources that are relevant and useful to me ○ New technical services and enhancements are delivered in a timely manner ○ The process to obtain Internet number resources is clear ○ Is a transparent organization ○ Provides clear and accurate information to customers and members ○ Policy Development Process creates useful/fair Internet number resource management policy ○ Provides timely responses to requests ● Supports efforts to keep Internet number registries self-governed, as defined by the needs of their respective communities ○ Has the right people for the job on staff ○ Provides clear communication about security practices, policies, and updates (new in 2026) ○ Transfer requests are processed in a timely manner ○ I am able to easily navigate the website to find the content I need ● Provides training and materials that are useful to me (new in 2020) ○ Clearly communicates the organization's future plans ● Staff interacts effectively with customers and members ○ Tools and resources (such as WHOIS, WhoWas, DNS, RDAP, IRR, RPKI, etc.) are easy to understand

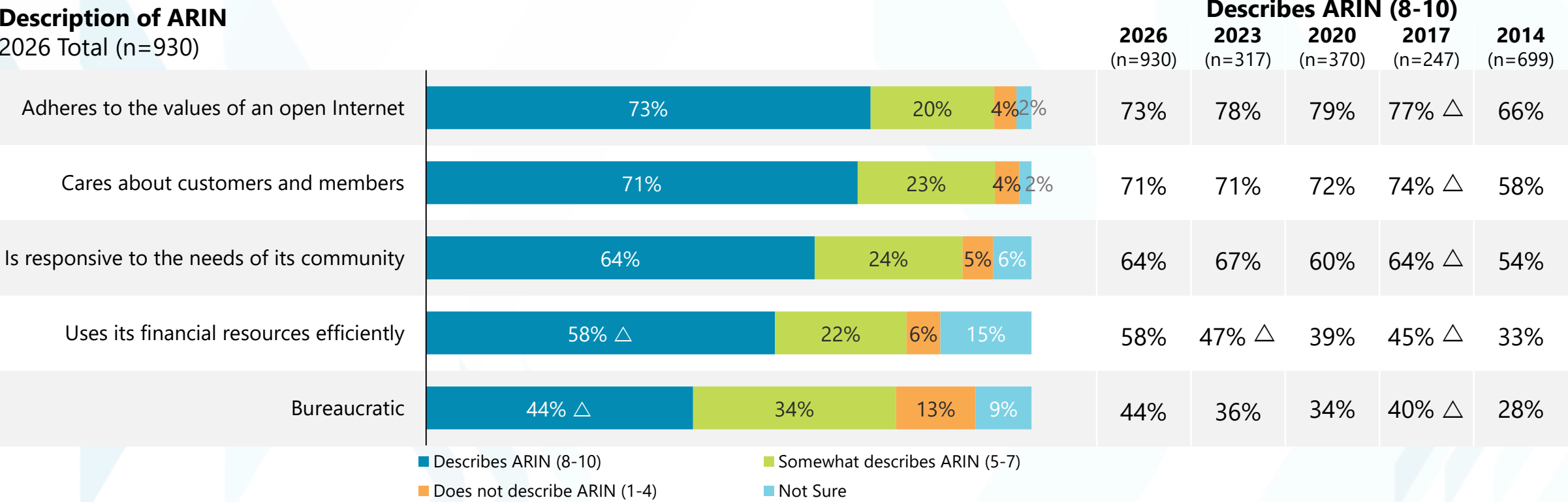
● Colored circle indicates quadrant in 2023; ○ Unfilled circle indicates no change in quadrant | Note: Services meet the security needs of my organization removed in 2026 wave



Perceptions and Positioning

ARIN's core reputation is stable, but bureaucracy is a growing watch-out

- ARIN's core reputation remains strong, with members continuing to associate the organization with openness, member focus, and community responsiveness.
- Confidence in ARIN's use of financial resources has improved significantly, but rising perceptions of bureaucracy suggest a potential need to simplify how members experience ARIN.



Q11. Please tell us how well the following statements describe ARIN.
Note: numbers may not sum exactly to 100% due to rounding | ▽ △ denotes significantly higher/lower than previous phase

Efficient use of financial resources and responsiveness remain the leading image priorities, though perceptions of financial stewardship have improved



- Perceptions that ARIN uses its financial resources efficiently have improved notably since 2023 (47% to 58%), reducing its Priority Index from 1.3 to 0.9.
- Efficient use of financial resources and responsiveness to community needs now share the highest priority, indicating that continued progress in demonstrating value and meeting member needs will have the greatest impact on loyalty.

ARIN Image

2026 Total (n=930)

	Priority Index*	Importance^	% Describes Well (8-10)
Uses its financial resources efficiently	0.9	29%	58%
Is responsive to the needs of its community	0.9	27%	64%
Cares about customers and members	0.6	21%	71%
Adheres to the values of an open Internet	0.6	23%	73%
Bureaucratic**	0.003	0%	44%

A Priority Index identifies areas where ARIN should focus most on managing its image. The highest indexed area is in the perception of using financial resources efficiently. Convincing people ARIN is effective here will have the greatest impact on loyalty.

*Priority Index = Importance x % Needs Improvement (rated 1-7) * 10 **Given the negative connotation of "bureaucratic," % improvement is flipped (rated 8-10) for this attribute when input into the priority index calculation
^Based on correlation with likelihood to continue using ARIN in Q3 | Q11. Please tell us how well the following statements describe ARIN.



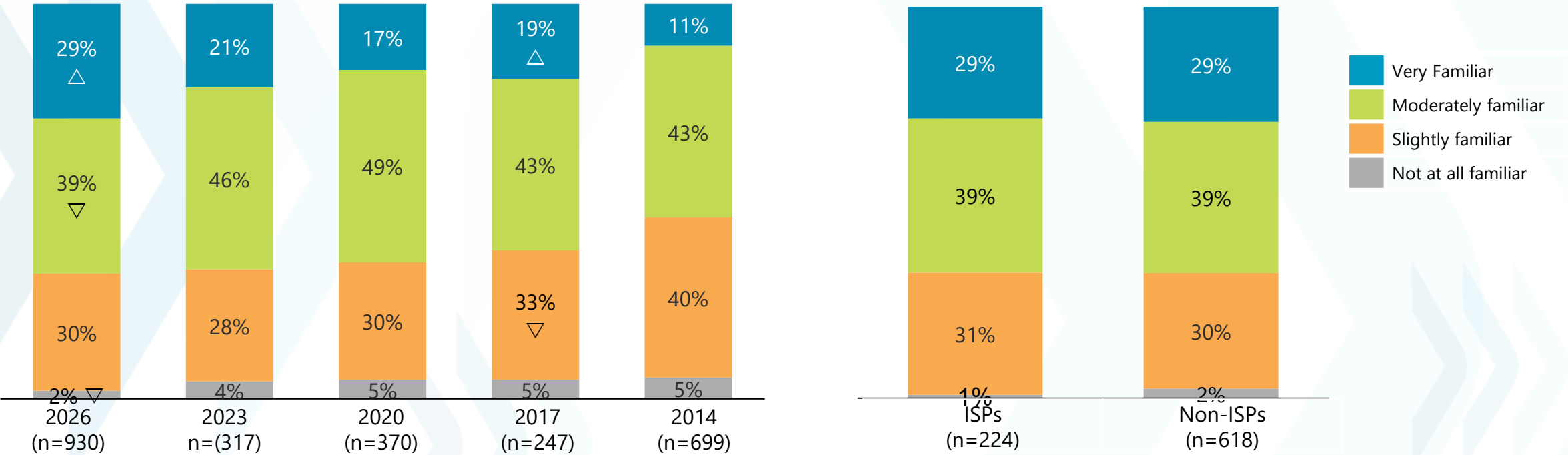
Familiarity and Usage of ARIN Products and Services

Familiarity with ARIN has deepened since 2023



- More respondents now consider themselves very familiar with ARIN, while overall familiarity remains consistently high.
- Familiarity is nearly identical among ISPs and non-ISPs, suggesting ARIN maintains broad visibility across the community.

Familiarity with ARIN



Q6. How familiar are you with ARIN and its activities?
▽△ denotes significantly higher/lower than previous phase | Note: numbers may not sum exactly to 100% due to rounding | Note: H indicates significantly higher than opposing group

Familiarity with ARIN's product and service portfolio remains very high



- Nearly all established ARIN products and services have familiarity above 90%, with several increasing significantly since 2023.
- Newer offerings, including ASPA (2026), Qualified Facilitator (2023), and Premier Support Plan (2021), show strong initial awareness but remain less familiar than ARIN's core services.

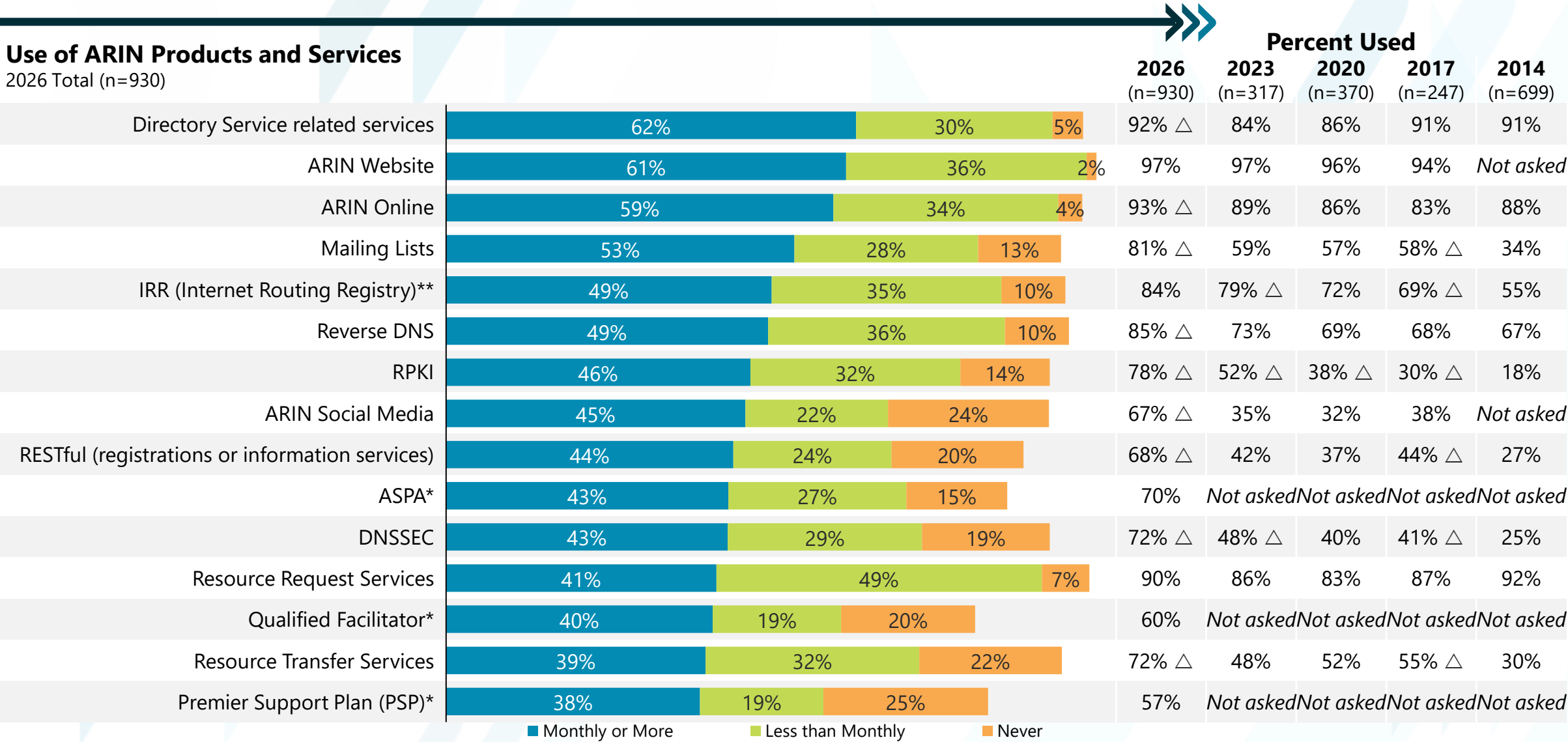
Familiarity with ARIN Products and Services

2026 Total (n=930)

		2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
ARIN Website***	99%	99%	99%	98%	Not Asked
Resource Request Service	98%	96%	97%	96% ▽	99%
Directory Service-related services	97%	94%	95% ▽	98%	98%
ARIN Online	96% △	94%	94%	93%	96%
Reverse DNS	94%	91%	90%	89%	93%
IRR (Internet Routing Registry)**	94%	91%	91%	89%	86%
Resource Transfer Services	93% △	89%	90%	92%△	82%
Mailing Lists	93% △	85%	86%	89%△	80%
DNSSEC	92% △	86%	84%	87%△	79%
RPKI	92% △	84%	80%	81%△	70%
ARIN Social Media	91% △	82%	81%	86%	Not Asked
RESTful	88% △	78%	78%	83%△	69%
ASPA*	85%	Not asked	Not asked	Not asked	Not asked
Premier Support Plan (PSP)*	82%	Not asked	Not asked	Not asked	Not asked
Qualified Facilitator*	80%	Not asked	Not asked	Not asked	Not asked

Q7. Below is a list of services and products developed by ARIN. For each one, please indicate how frequently you use each product or service (not familiar was an option)
 ▽△ denotes significantly higher/lower than previous phase | *Note: Response options added in 2026 | **Note: Slight word change in 2026 | ***Note: New question/addition in 2017

Use of ARIN products and services continues to broaden, with notable growth in mailing lists, RPKI, RESTful services, DNSSEC, and social media.



Q7. Below is a list of services and products developed by ARIN. For each one, please indicate how frequently you use each product or service. | ▽△ denotes significantly higher/lower than previous phase | *Note: word change in 2020 | Note: % not familiar not shown | *Note: Response options added in 2026 | **Note: Word Change in 2026

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Satisfaction has softened across the portfolio, but service perceptions remain positive

- Satisfaction has softened across most ARIN products and services since 2023, suggesting a broader shift in perceptions rather than concerns with any single offering.
- Even so, established services continue to perform well, and newer services such as ASPA and Qualified Facilitator are receiving positive early feedback.

Satisfaction with ARIN Products and Services

Reporting % Highly Satisfied (6-7) among those who have used product or service

		2023 (n=109-307)	2020 (n=94-354)	2017 (n=74-232)	2014 (n=122-641)
ARIN Website**	69% ▽	79%	80%	79%	Not asked
ARIN Online	69% ▽	79%	81%	80%	74%
Directory Service related services	67% ▽	79%	79%	78%	82%
IRR (Internet Routing Registry)*	67% ▽	81%	76%	70%	71%
Resource Request Services	66% ▽	79%	77%	71%	76%
ASPA*	66%	Not asked	Not asked	Not asked	Not asked
Reverse DNS	63% ▽	78%	81%	77%	78%
RPKI	62% ▽	79%△	68%	61%	64%
Resource Transfer Services	61% ▽	70%	70%	66%	64%
ARIN Social Media**	61%	67%	77%	70%	Not asked
Mailing Lists	60% ▽	72%	73%	71%	65%
DNSSEC	60% ▽	69%	75%△	63%	71%
Qualified Facilitator*	59%	Not asked	Not asked	Not asked	Not asked
RESTful	59% ▽	69%	76%	65%	67%
Premier Support Plan (PSP)*	55%	Not asked	Not asked	Not asked	Not asked

Q8. How satisfied are you with each of the following products and services offered by ARIN?
▽△ denotes significantly higher/lower than previous phase | *Note: Response options added in 2026 | **Note: New question/addition in 2017

Engagement with ARIN is shifting toward a broader mix of channels

- Members are engaging with ARIN through a broader mix of channels than in prior waves, with increases in social media, in-person events, chat, and mailing lists.
- At the same time, contact through ARIN Online has declined, suggesting members are increasingly engaging outside ARIN's core portal experience.

Contact with ARIN in the Past 12 Months

2026 Total (n=930)

		2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Contacted ARIN through ARIN Online	42% ▽	61%	62%	70% △	44%
Contacted ARIN through email*	40%	44%	49%	47%	Not asked
Interacted with ARIN via social media	33% △	9%	7%	11% △	2%
Attended an in-person meeting or event*	27% △	10% △	6% ▽	15%	Not asked
Taken an ARIN survey about a registration transaction	26%	23%	21%	27% △	14%
Contacted ARIN by telephone	22%	18% ▽	24%	28% ▽	20%
Contacted ARIN through chat**	22%	Not asked	Not asked	Not asked	Not asked
Voted in an election	20%	23% △	14%	19% △	12%
Posted to an ARIN mailing list	17% △	8%	8%	13% △	6%
None of the above	12%	16%	17%	11%	18%

Communication preferences are diversifying beyond traditional channels



- Email remains the primary information channel, but both current and preferred use have declined since 2023 as members increasingly engage through a broader mix of channels, especially social media, webcasts, events, and phone.

Current Method of Receiving Information/Updates from ARIN*

Total

How Information was Received	2026 (n=930)	2023 (n=317)	2020 (n=370)	2017 (n=247)
Email	70% ▽	82% ▽	88%	85%
ARIN Online	43% ▽	58%	58%	65%
ARIN Mailing List**	34%	40%	Not asked	Not asked
Social Media	32% △	10%	12% ▽	19%
Webcasts/Virtual Meetings	22% △	12%	12% △	7%
Phone	16% △	8%	11%	16%
In-person meetings or events	16% △	10% △	5% ▽	13%
Postal mail	16% △	3%	5% ▽	11%
Other	1%	1%	1%	2%
Not Sure	2%	1% ▽	4%	4%

Preferred Method of Receiving Information/Updates from ARIN

Total

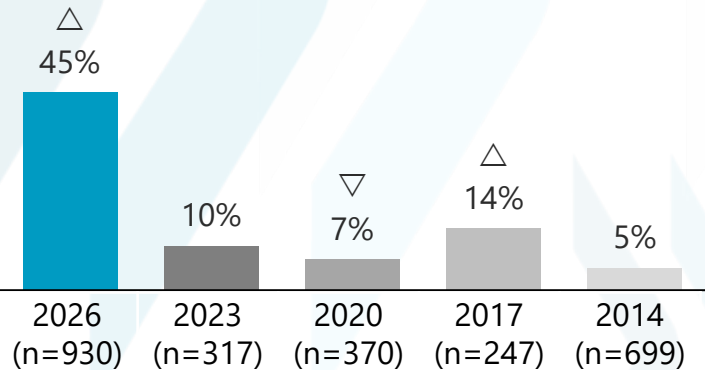
Preferred Method	2026 (n=930)	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Email	75% ▽	84% ▽	92%	91% △	77%
ARIN Online	39% ▽	47%	47% ▽	56%	57%
Social media*	28% △	8%	9% ▽	17%	Not asked
ARIN Mailing List**	27%	32%	Not asked	Not asked	Not asked
Webcasts/Virtual Meetings*	18%	17%	18%	15%	Not asked
In-person meetings or events	16%	13%	11%	14% △	2%
Phone	14% △	8%	10%	13%	26% ▽
Postal mail	13% △	4%	6%	6% △	2%
Other	0%	0%	1%	1%	1%
Not Sure	1%	2%	2%	2%	1%

Policy participation has increased sharply, but access barriers remain



- Participation in ARIN’s Policy Development Process has increased sharply since 2023, driven by greater mailing list engagement.
- Non-participation is less about lack of interest and more about practical barriers, especially time, uncertainty about how to participate, and eligibility.

Participation in the ARIN Policy Development Process in the Past 12 Months
Reporting those who said ‘Yes’



Method of Participation** Among those participating	2026 (n=423)	2023 (n=32)	2020 (n=26^)	2017 (n=35)	
Posted to the General Members Mailing List***	51%	34%	Not asked	Not asked	
Posted to the Public Policy Mailing List	35%	25%	58%	60%	
Attended a Public Policy and Members' Meeting - In-person	32%	47%	31%	57%	
Attended a Public Policy and Members' Meeting - Remotely (webcast)	23%	34%	62%	29%	

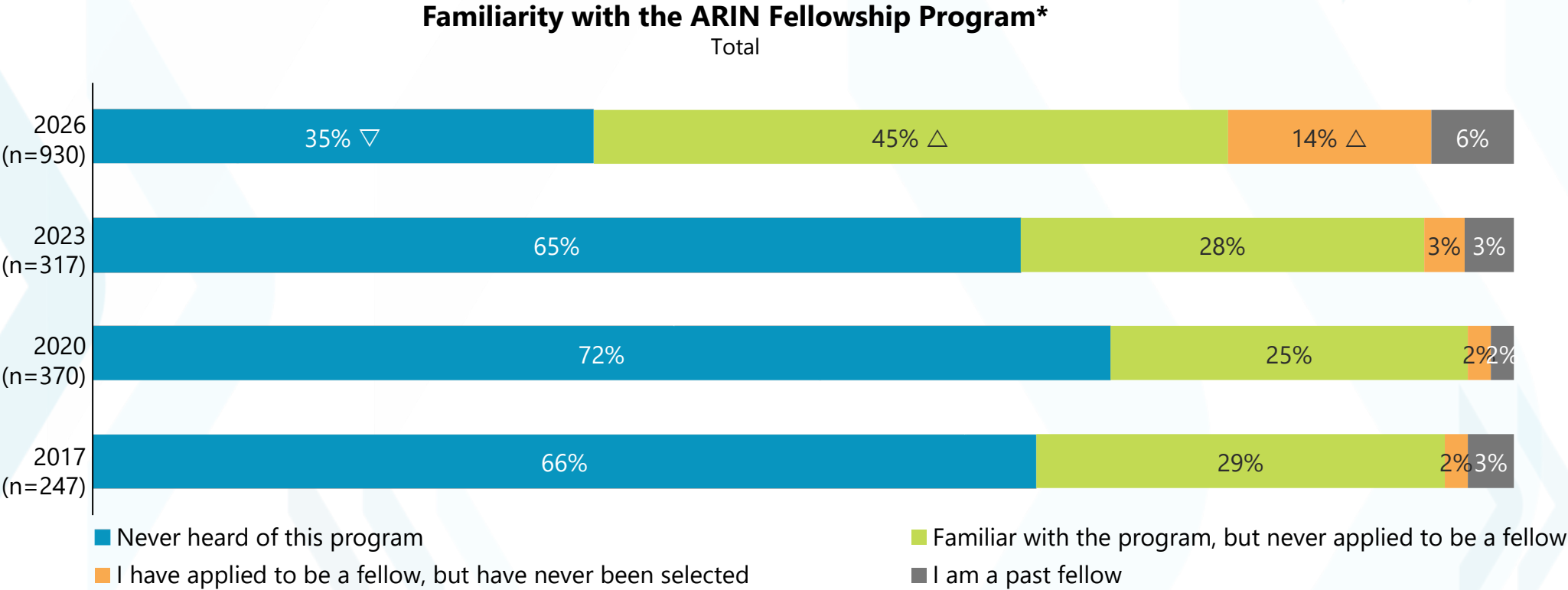
Reasons for Not Participating* Among those not participating	2026 (n=507)	2023 (n=285)	2020 (n=344)	2017 (n=212)	2014 (n=663)
I do not have time to participate	29% ▽	41% △	33%	31%	26%
I do not know how to participate	27%	32%	33%	35%	Not asked
I did not think I was eligible to participate	22%	25%	22% ▽	33%	Not asked
I am happy with ARIN policy and do not see a need to get involved	21%	22%	25%	18%	23%
I do not think I can have an impact on ARIN policy	18%	17%	17%	21%	22%
I do not have the resources to participate	17% △	12%	16%	12% ▽	18%
I do not have any interest in participating	12%	15%	11%	12%	13%

Q14. Have you participated in the ARIN Policy Development Process in the past 12 months? | Q14a. How did you participate? | Q14b. Why not? You may check all that apply.
▽△ denotes significantly higher/lower than previous phase | ^Caution; small sample size | *Note: Reasons less than 10% not shown | **Note: New question in 2017 | ***Note: New answer code in 2023

Fellowship awareness has grown, creating an opportunity to drive participation



- Awareness of the ARIN Fellowship Program has increased substantially since 2023, with those who have never heard of it nearly halving.
- Most of the growth is among those familiar with the program but not yet applicants, suggesting ARIN has an opportunity to convert awareness into participation.



Training interest remains focused on core technical needs

- Interest remains strongest for RPKI and IPv6 deployment, while the significant increase in ARIN Online training suggests growing demand for help navigating ARIN’s digital tools.

Training Interest

2026 Total (n=930)

		2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
RPKI (Resource Public Key Infrastructure)	49%	51%	45% △	36% △	28%
IPv6 deployment	46%	45%	43% ▽	53%	52%
Use of ARIN tools and services (Whois, WhoWas, DNSSEC, etc.)	40%	44% ▽	51% △	40%	40%
Use of ARIN Online	35% △	23%	24%	23%	18%
IPv4 transfers	32%	35%	32%	29% △	23%
ARIN should not provide formal training services	2%	2%	2%	4%	5%
Other	2%	3%	6%	3%	3%
Not sure	12% ▽	17%	15%	17%	22%

Q16. For which of the following topics would you be interested in formal training provided by ARIN? Please select all that apply.
▽△ denotes significantly higher/lower than previous phase

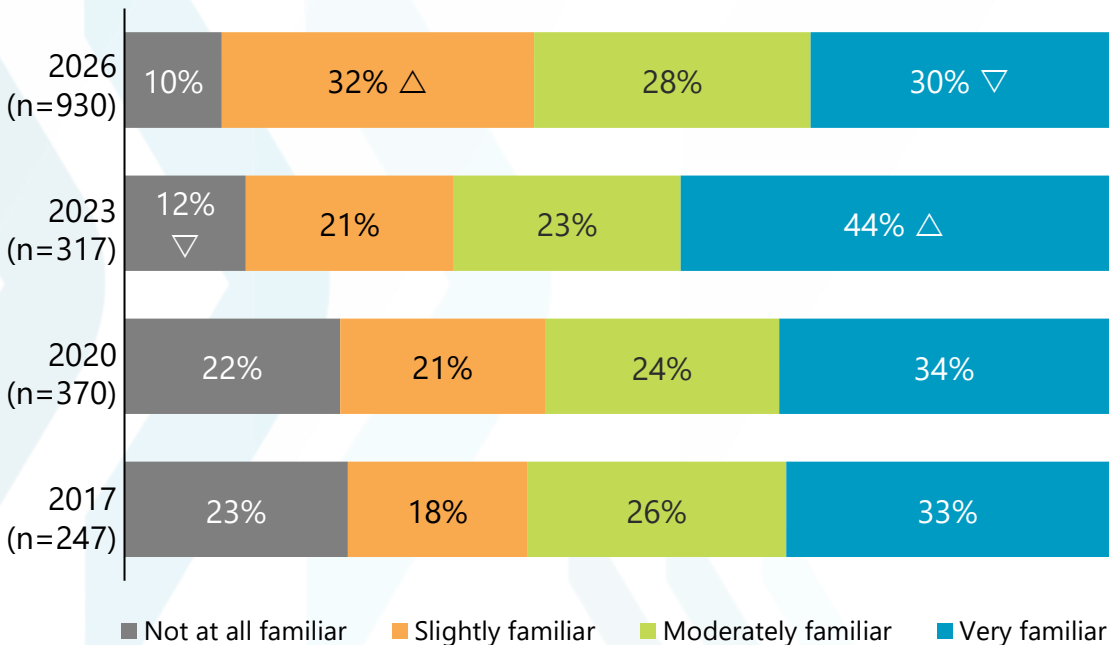
POC validation remains important despite softer familiarity



- Familiarity with ARIN’s annual POC validation process has declined since 2023, but members continue to view the process as important, suggesting awareness has softened more than perceived value.
- ISP members remain more familiar with the process than non-ISPs (37% vs 29%), though both groups are equally likely to view it as critical (37% vs 36%).

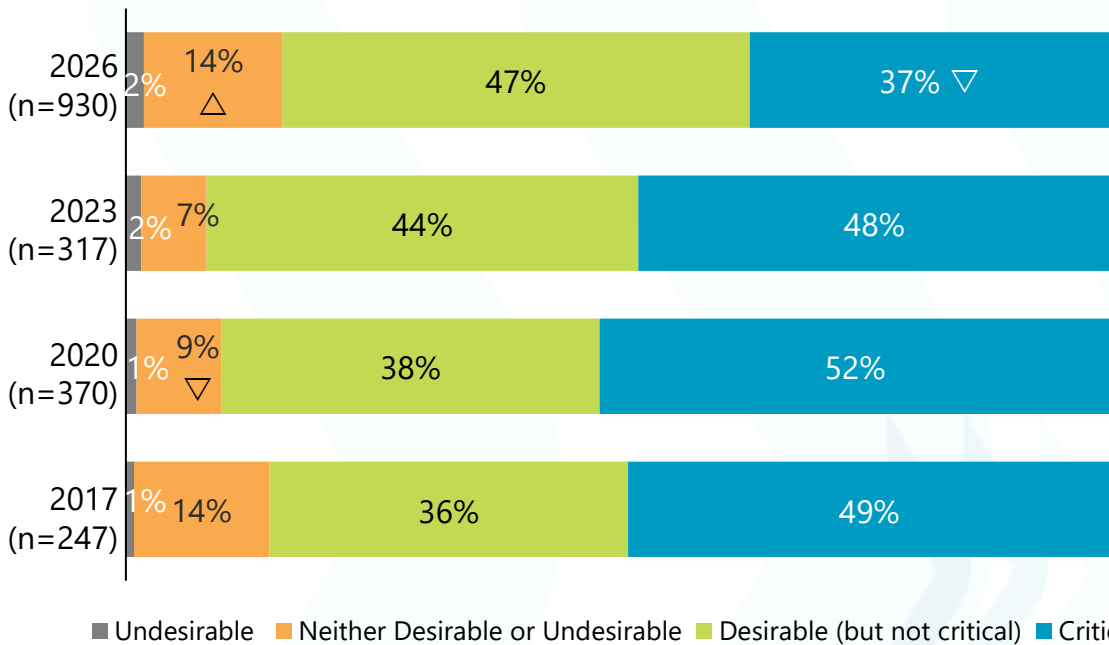
Familiarity with ARIN’s Annual POC Validation Process*

Total



Importance of ARIN’s Annual POC Validation Process*

Total

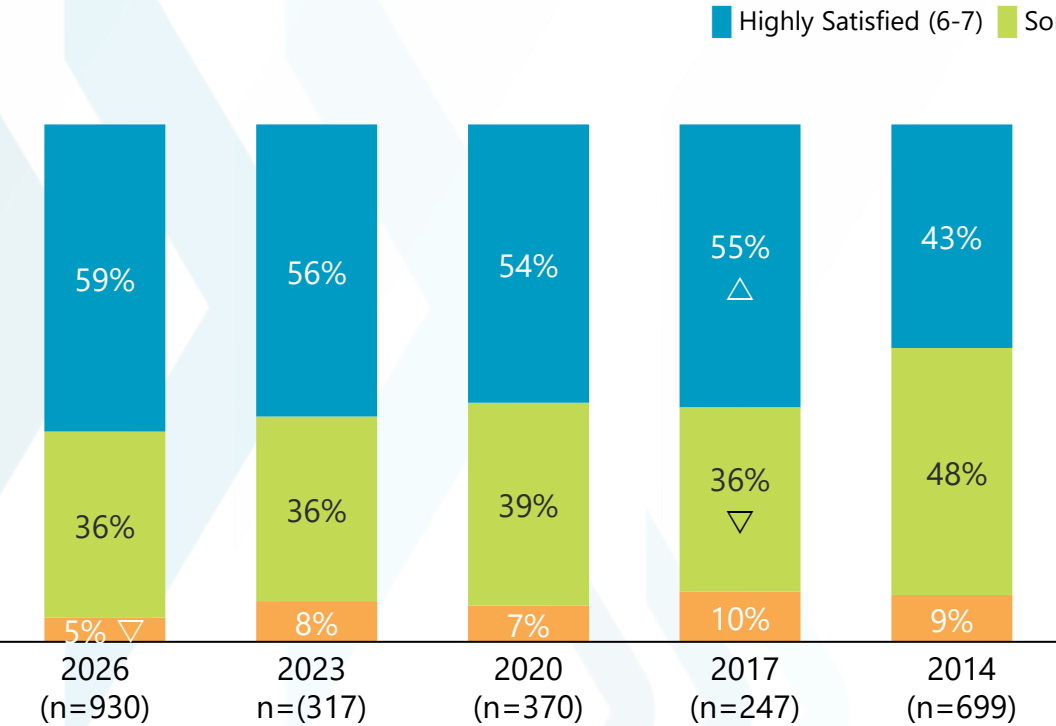


Q19. How familiar are you with ARIN’s Annual Points of Contact (POC) Validation process? | Q19_A. How important do you feel it is for ARIN to validate Points Of Contact (POCs) registered in the ARIN Whois database on an annual basis via email?
▽△ denotes significantly higher/lower than previous phase | *Note: New question/addition in 2017

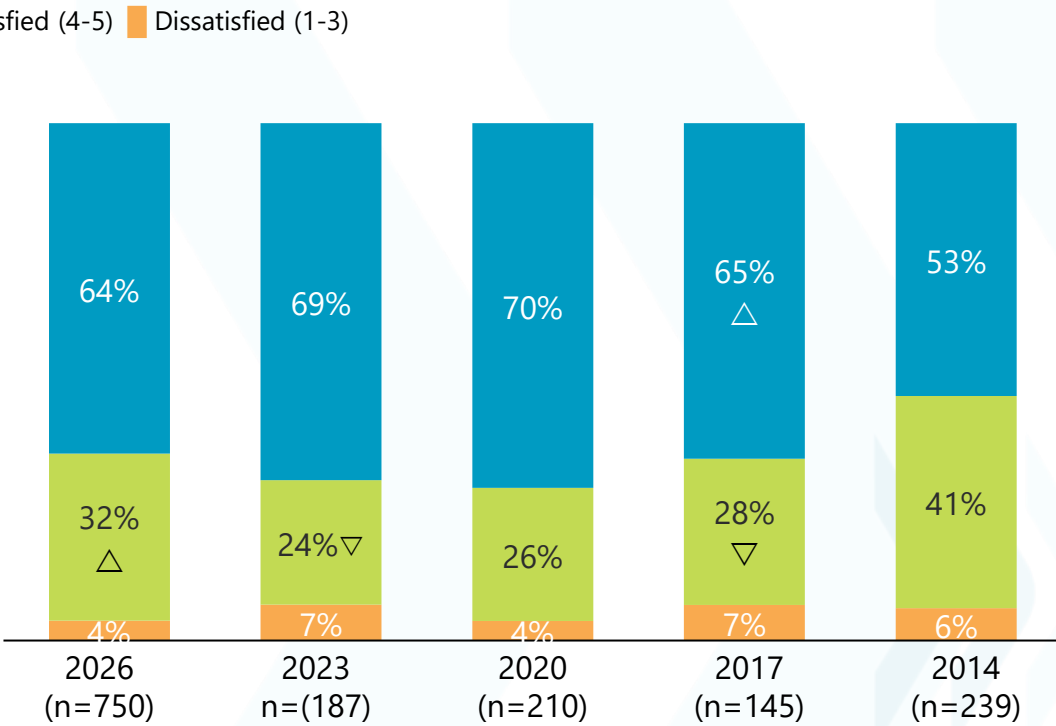
Mailing lists continue to deliver a strong experience for users

- Overall satisfaction with ARIN's mailing lists remains stable, while users continue to report consistently high satisfaction with their experience.
- Dissatisfaction remains low, suggesting mailing lists continue to effectively support community engagement.

Mailing List Satisfaction
Total



Mailing List User Satisfaction
Among Mailing List Users

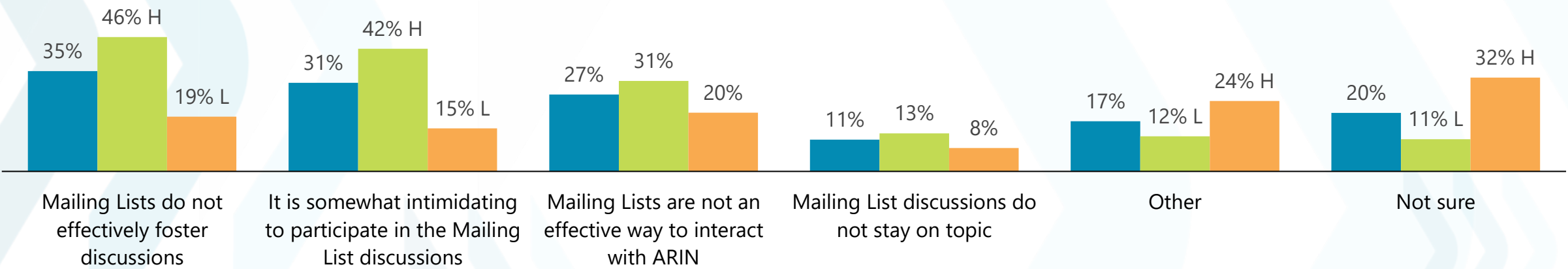


Lower satisfaction with mailing lists centers on the experience

- Among less satisfied respondents, lower ratings are driven primarily by perceptions that mailing lists do not foster meaningful discussion, are intimidating to participate in, and are not an effective way to interact with ARIN.

Reasons for Lower Satisfaction
(Among those who rated satisfaction less than a 5 on a 7-point scale)

Total (n=173)
Mailing Lists User (n=99)
Non-User (n=74)



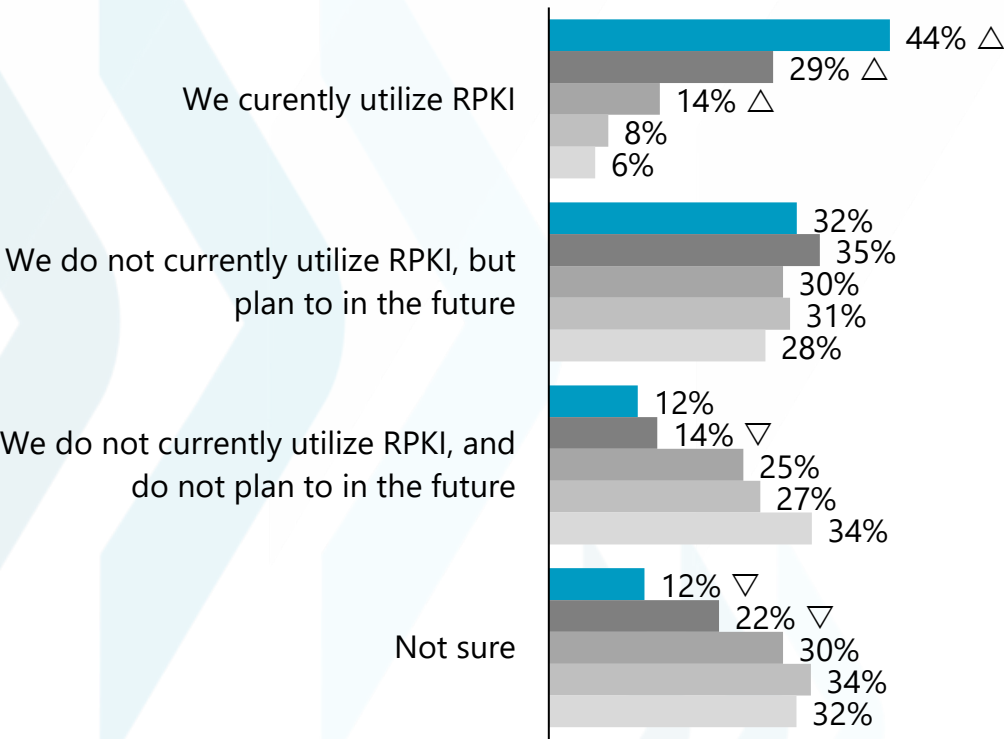
Q15a. Why did you rate your satisfaction a [INSERT ANSWER FROM Q15]? Please select all that apply.
Note: H/L indicates significantly higher/lower than Total

RPKI adoption continues to accelerate, while IPv6 planning is becoming more formal

- Adoption continues to mature, particularly for RPKI, where usage is strongest among ISPs (55% vs. 42% among non-ISPs), while IPv6 organizations are increasingly moving from future intent to formal deployment plans.

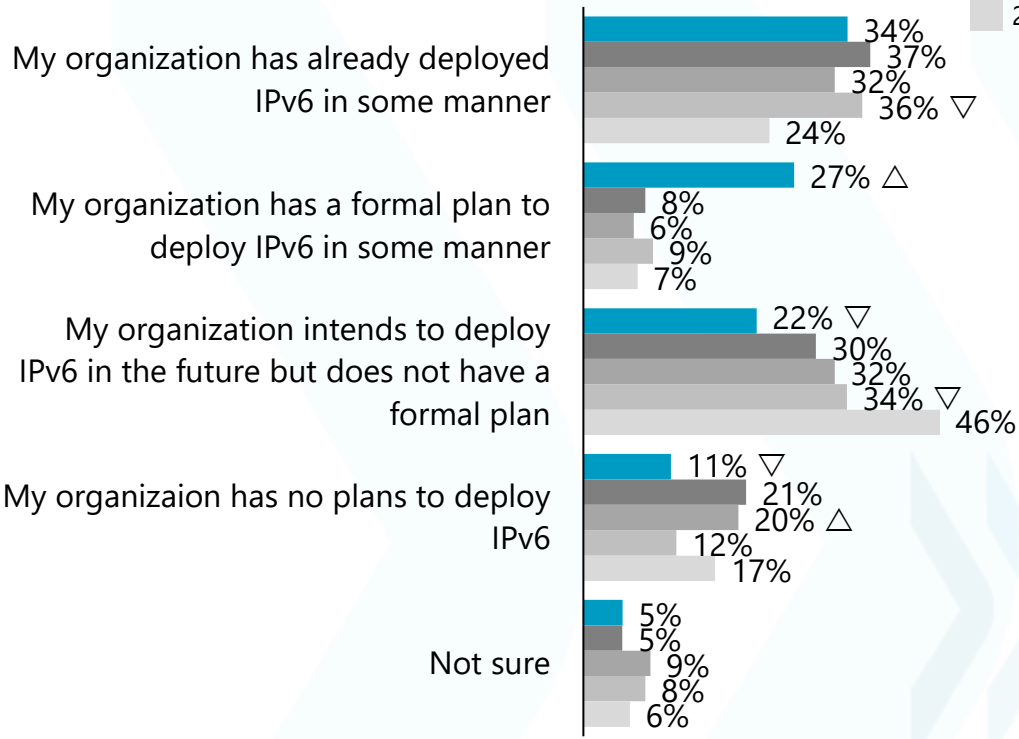
RPKI Usage

Total



IPv6 Deployment

Total



Q17. Does your organization utilize RPKI (Resource Public Key Infrastructure)? | Q18. What is your organization's current plan for IPv6 deployment?
 ∇ Δ denotes significantly higher/lower than previous phase | Note: numbers may not sum exactly to 100% due to rounding



American Innovation Index™

What is the American Innovation Index™ (Aii)?

- An ambitious program that ranks nearly 200 U.S. companies across 20 industries, including ISPs, television providers and wireless phone companies, on their level of innovativeness, as viewed through the eyes of their customers.
- The Aii program began in 2018 and is conducted by Rockbridge Associates, Inc., in partnership with the Gabelli School of Business at Fordham University and the Center for Innovation at the Norwegian School of Economics (NHH).
- Researchers at the Norwegian School of Economics (NHH) believed **the true indicator of innovativeness in a market is what can be gleaned from the actual experiences of consumers.**
- **Innovativeness is an important feature for companies to address in their strategy because it correlates with loyalty and predicts higher stock returns.** A company may actually invest too much in ensuring high satisfaction and not enough in new and innovative ways of meeting customer needs. Social innovation is also an area of emerging importance in a business environment. Importance was derived statistically based on how well an attribute explains the mean loyalty index (average of satisfaction with meeting needs, satisfaction with value, and likelihood to continue using ARIN)



radius



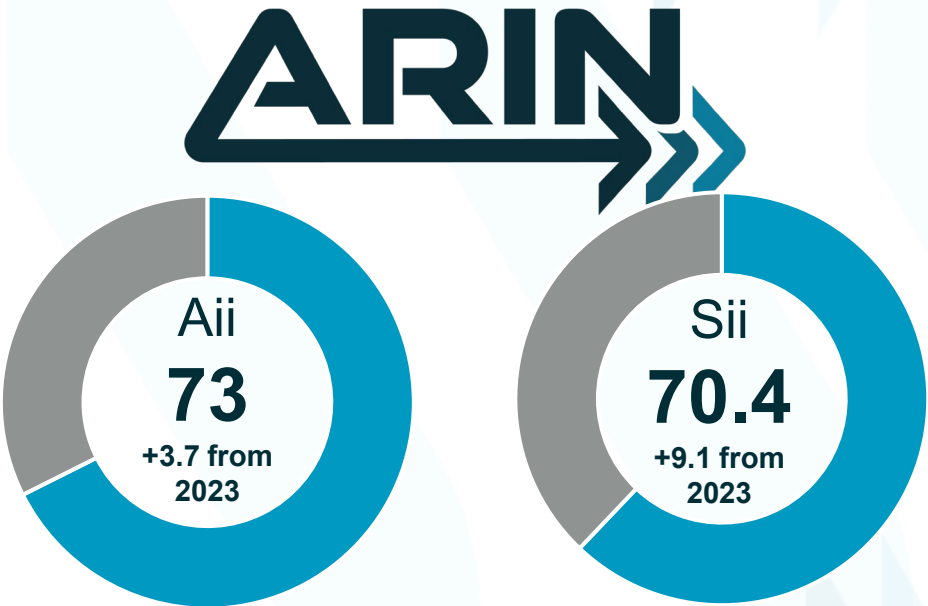
ARIN outperforms the average technology company on innovation, with particularly strong gains in social innovation

- ARIN scores above the average technology company on both the American Innovation Index (73 vs. 69.7) and the Social Innovation Index (70.4 vs. 62.8), reinforcing its reputation as an innovative, member-focused organization.
- Both measures have improved since 2023, with the largest gain in Social Innovation (+9.1 points), suggesting members increasingly recognize ARIN's broader contribution to the Internet community and society.



American Innovation Index (Aii): An innovative association is one that is creative, sets trends, and comes up with new solutions for members.

Social Innovation Index (Sii): A socially innovative association is one that focuses on innovating for the benefit of society and the environment.

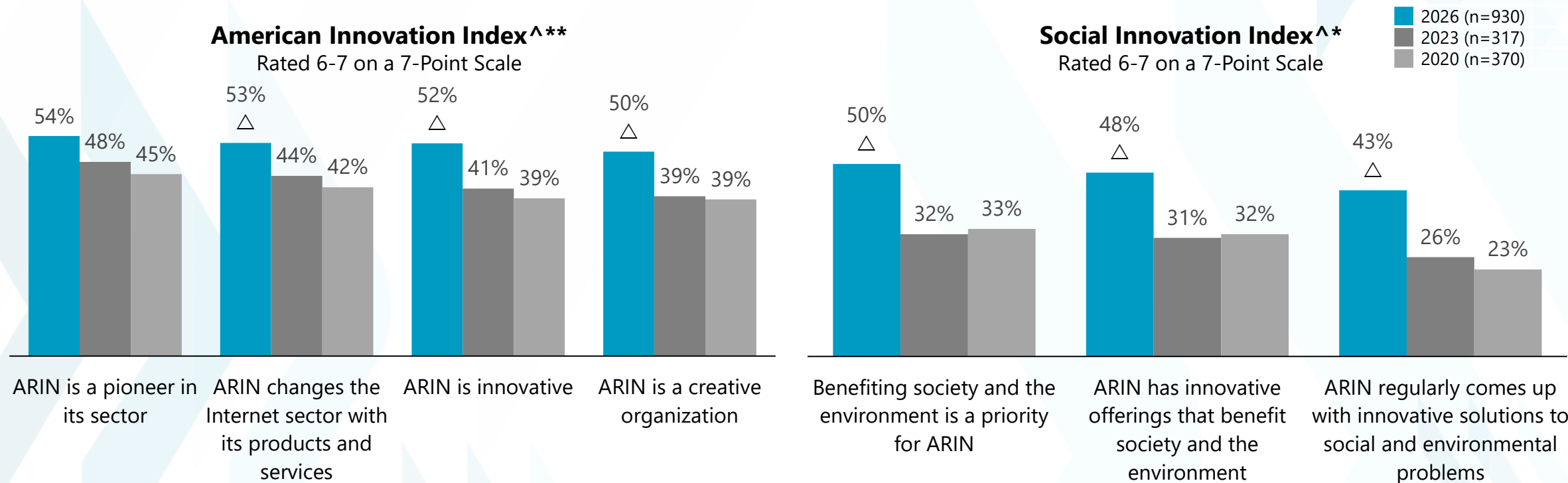


- The average Aii and Sii scores for all companies in 2022 was 69.7 and 62.8, respectively.

Innovation perceptions have strengthened across both industry and societal impact



- Members increasingly view ARIN as both an industry innovator and an organization committed to broader societal impact, with significant gains across nearly every innovation measure since 2023.



[^]Note: these questions constitute the American Innovation Index for membership organizations, Copyright 2023 by Rockbridge Associates, and may only be used or printed with permission.

[^]Note: these questions constitute the Social Innovation Index for membership organizations, Copyright 2023 by Rockbridge Associates, and may only be used or printed with permission.



Demographics and Firmographics

Professional Characteristics



- Compared with prior waves, the 2026 respondent profile is more professionally diverse, with a less tenured workforce and a broader mix of occupations beyond network engineering.

Years in Profession	2026 (n=930)	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Less than 1 year	1%	1%	1%	1%	0%
2 to 5 years	16% △	10%	6%	6% △	3%
6 to 10 years	27% △	7%	10%	12%	11%
11 to 15 years	18% △	8%	11%	15% ▽	22%
16 to 20 years	8% ▽	14%	18%	21%	26%
21 or more years	31% ▽	61%	54% △	44% △	37%
Average Years in Profession	13	18	18	17	17

Occupation	2026 (n=930)	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Network Engineer	31% ▽	46%	47%	42%	46%
Systems Administrator	20% △	13%	15%	16%	17%
Management	18% ▽	29%	26%	22%	26%
Software Coder/Developer	17% △	5%	4%	6% △	3%
Marketing/Business Development	9% △	1%	1%	1%	1%
Attorney/Legal Services	1%	0%	1%	0%	1%
Other	5%	6%	6% ▽	12%△	7%

D1. How many years have you worked in your profession? | D3. Which of the following best describes your occupation?
▽△ denotes significantly higher/lower than previous phase | Note: numbers may not sum exactly to 100% due to rounding

Company Characteristics



- Compared with 2023, the sample includes more respondents from network access providers and mobile network providers, alongside a shift toward mid-sized organizations.

Type of Company	2026 (n=930)	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Internet service provider	24%	27%	22%	27%	22%
Hardware/Software vendor	13%	9%	8% ▽	14% △	5%
Network access provider	13% △	8%	9%	6%	5%
Internet content provider	11%	7%	7%	8%	8%
Education	9%	11%	9%	14%	18%
Mobile network provider	7% △	0%	1%	1%	1%
Government	5%	6%	6%	6%	6%
IPv4 transfer facilitator/broker	2% △	0%	1%	1% △	0%
Other	9% ▽	23%	24%	19% ▽	30%
None of the above	7%	7% ▽	13% △	4%	5%

Number of Employees	2026 (n=930)	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
1	3% ▽	5%	7%	7% △	3%
2-24	16% ▽	27%	26% △	18%	17%
25-49	13% △	6%	5%	6%	6%
50-99	19% △	8%	6%	8%	5%
100-499	22% △	14%	16%	16%	19%
500-999	8%	9%	6%	10%	9%
1,000 or more	18% ▽	32%	34%	35%	41%
Average # of Employees	425	604	612	660	741

Company Location	2026 (n=930)	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
United States	89% △	83%	86%	86%	86%
Canada	7%	10%	10%	9%	11%△
Puerto Rico	1%	1% △	0% ▽	1%	0%



Thank You

