



**ARIN**

American Registry for Internet Numbers

# **CUSTOMER SATISFACTION 2017 TRACKING RESEARCH**

January 2018

# Table of Contents

- **Study Objectives**
- **Background & Methodology**
- **Executive Summary & Recommendations**
- **Detailed Findings**
  - Satisfaction & Loyalty
  - Performance & Expectations
  - Perceptions & Positioning
  - Familiarity & Usage of ARIN Products and Services
  - Demographics & Firmographics

# 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.
- 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 serves as a follow up to the baseline study conducted in 2014 and has the following core 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 the previous survey completed in 2014

# Background & Methodology

- This report provides results to a survey of ARIN members, customers, and community participants. An online survey was conducted between November 30 and December 23, 2017.
- 545 community members participated, with 247 individuals completing the full survey. To make direct comparisons between current performance and that of 2014, results are based on those who completed the full survey unless otherwise indicated.
- Those that completed the survey have the following relationships with ARIN:
  - 99: Has a direct allocation of IP addresses (IPv4, IPv6) from ARIN, and is a member.
  - 103: Has a direct assignment of Internet number resources (IPv4, IPv6, ASN) from ARIN.
  - 32: Has no direct Internet number resources from ARIN, but uses some ARIN services.
  - 13: Has no direct Internet number resources from ARIN, and does not use ARIN services, but is part of the ARIN community.
- The median survey time was 15 minutes.
- The margin of error (95% level of confidence) for results based on the total sample is +/- 6%. The margin of error is larger for subgroups of the data.
- 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.
- Numbers may not sum exactly due to rounding.

# Executive Summary

- Community members' satisfaction with ARIN is up from 2014, with three-fourths (76%) who are highly satisfied with ARIN meeting their needs.
- 7 in 10 are highly satisfied with the value they receive from the fees they pay and would not opt for higher or lower fees (with respectively higher and lower service levels) if given the opportunity.
- Familiarity with ARIN has increased since 2014, with 6 in 10 community members at least moderately familiar with ARIN and a fifth who are highly familiar.
  - Familiarity with several of ARIN's key services has also increased, including Resource Transfer Services, Mailing Lists, DNSSEC, RESTful, and RPKI.
  - That being said, two-thirds (66%) have never heard of ARIN's Fellowship Program.
- WHOIS, ARIN Online and the ARIN website are the most utilized products and services and satisfaction with these items is high.
- Usage of several services is up from 2014, namely the Resource Transfer Services (55% used in 2017 vs. 30% in 2014) and Mailing Lists (58% in 2017 vs. 34% in 2014).
- Participation in the Policy Development Process is low (14%) but is up from just 5% in 2014.
- Email (91%) and ARIN Online (56%) are the most preferred methods to receive information from ARIN.
- Community members continue to show most interest for trainings on IPv6 and ARIN tools, while interest for RPKI training is up from 2014.

# 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 34 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.
- ARIN's improvement efforts are evident, as performance moved closer to meeting expectations (which remained fairly consistent) for nearly all of the 34 attributes since 2014. Looking across dimensions, ARIN closed the gaps from expectations by an average of 10 percentage points and has brought the gap of every dimension to below 10 points, with several dimensions meeting or nearly meeting expectations. This represents a considerable improvement, as only one dimension had a gap below 10 points in 2014.
- ARIN made the most progress in the areas of Internet Governance, Communication Outreach, and Policy Development, which moved 12 to 14 percentage points closer to meeting community members' expectations since 2014.
- Several areas identified as improvement opportunities in 2014 have now become key strengths, including effective board oversight, timely resource request processing, transparency, and providing clear/accurate information, while some former strengths have become opportunities, such as transfer listing service quality and effective staff interaction.

# Executive Summary – ARIN Performance Scorecard: **Strengths**

## **2017 Strengths for ARIN include:**

- Internet Governance and Security are meeting expectations; however, these tend to be less important areas to members/customers.
- Policy Development has room for improvement on some attributes, but is meeting or exceeding expectations when it comes to adhering to the board ratified policy and effective board oversight, which are areas of high relative importance.
- Financial Services and Engineering perform well on most attributes.
- Offering sufficient opportunities to provide customer and member feedback and being transparent as an organization are important to members/customers, and both areas improved significantly since 2014 and are now in line with expectations.
- Community members feel the content and activities of meeting are engaging enough to attend.

# Executive Summary – ARIN Performance Scorecard: Opportunities

## 2017 Key Opportunities include:

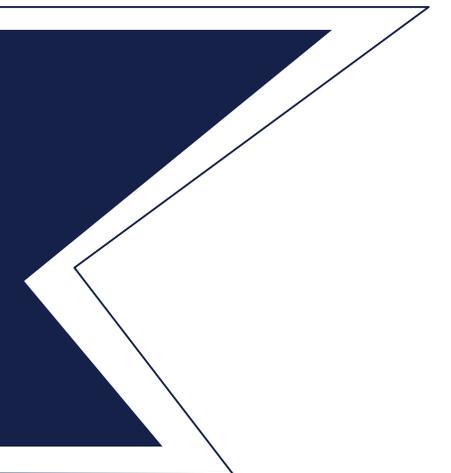
- All facets of Customer Service are high in importance and most are performing below average in terms of meeting expectations, relative to the other performance areas. Top opportunities in Customer Service include:
  - Providing timely responses to requests (16 points from expectations) – High Importance
  - Staff interacts effectively with customers and members (6 points) – High Importance
  - Staff works with customers to resolve complex issues (5 points) – High Importance
- Registration Services is meeting expectations for timeliness of resource requests, but most items in this area need improvement, including:
  - Transfer listing service operates at a high level of quality, usability, and reliability (14 points) – High Importance
  - Transfer requests processed in a timely manner (11 points)
  - Process to obtain Internet number resources is clear and straightforward (8 points)
- While ARIN has made strides with some facets of Communications and Outreach, opportunities exist to do a better job on the following items:
  - Ease of navigating the website (12 points) – High Importance
  - Communicating in ways that meet community members' needs (7 points) – High importance
- Community members expect a clearer, more transparent election process for the Board and Advisory Council (10 points)
- Engineering has considerable room for improvement when it comes to making tools and resources easy to understand (9 points)

# Recommendations

- Timeliness (or lack thereof) is clearly an issue among community members, as it emerged both in terms of customer service response times and transfer requests. As demand for the more involved and time consuming resource transfer services increases, it is important for ARIN to carefully manage expectations – not only in terms of timing, but also of the various steps in the process and task owners throughout the process.
- The increased resource transfer demand is likely putting an additional burden on Customer Service, while increasing staff could be necessary, ARIN should first ensure it exhausts opportunities to limit the need for contact with customer service by offering self service features wherever possible.
- The website redesign that ARIN is currently undertaking should help ease the burden on customer service, as improved navigation, clearer content, and enhanced design should help drive community members to the website (instead of customer service) when they have questions or need information. ARIN should ensure there is appropriate marketing around the website relaunch to maximize its potential.
- ARIN should also consider enhancing its tools and resources (such as WHOIS, WhoWas, DNS, etc.) to make them easier for users to understand. Again, not only would this increase satisfaction with these tools, it could have a trickle down effect and help mitigate the extent to which staff are needed to assist community members.
- Lastly, ARIN has clearly made strides in terms of transparency, but community members still find the election process for the Board and Advisory Council to be somewhat obscure. Given ARIN's dedication to transparency this is likely an issue stemming from lack of awareness or familiarity with the process and how to participate. While this information is on ARIN's website, periodic updates and reminders through ARIN's various channels (e.g., email, social media, "spotlight" on the website homepage, etc.) could help perceptions around the transparency of the process.

A background of a network diagram with white nodes and lines on a light blue gradient.

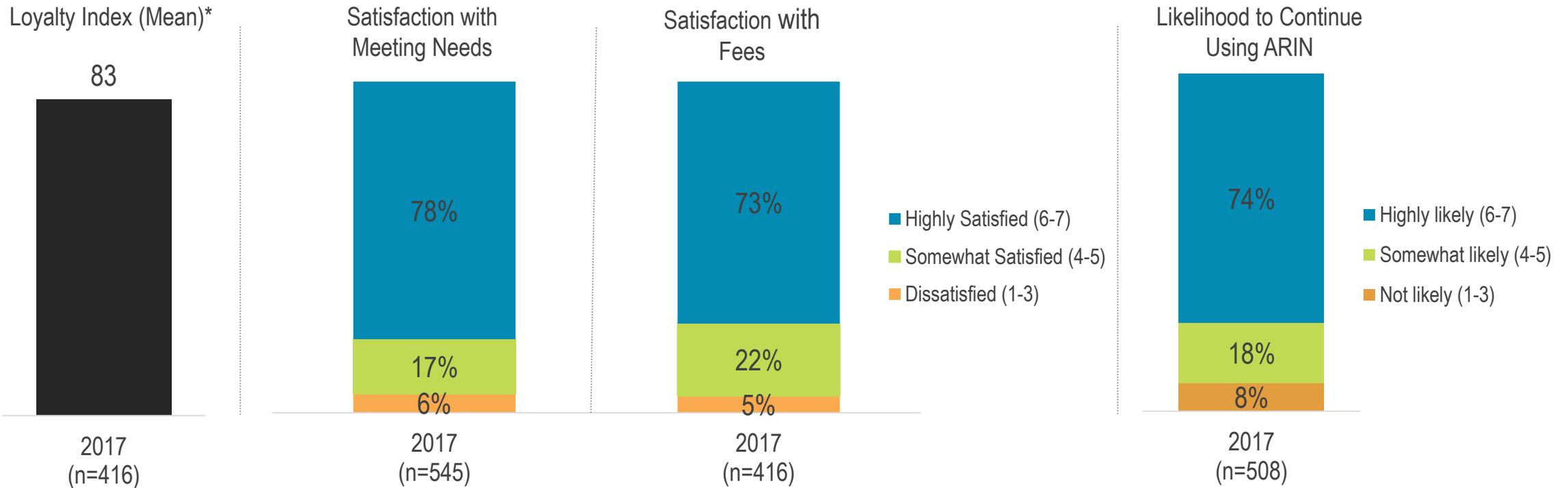
# Satisfaction & Loyalty



# Among all participants, about 8 in 10 are satisfied that the organization is meeting needs

- Results below are not directly comparable to 2014 since data includes responses from participants who did not complete the full survey. In order to reliably compare this year's performance to 2014, the remainder of the report is based on only those who completed the survey in its entirety.

## Overall Loyalty Metrics (ALL PARTICIPANTS)



\*Combines satisfaction with meeting needs, satisfaction with value, and likelihood to continue using equally into one measure

Note: numbers may not sum exactly to 100% due to rounding

Q1. Thinking about your interactions with ARIN and the products and services it provides, how satisfied are you with ARIN in meeting your organization's needs?

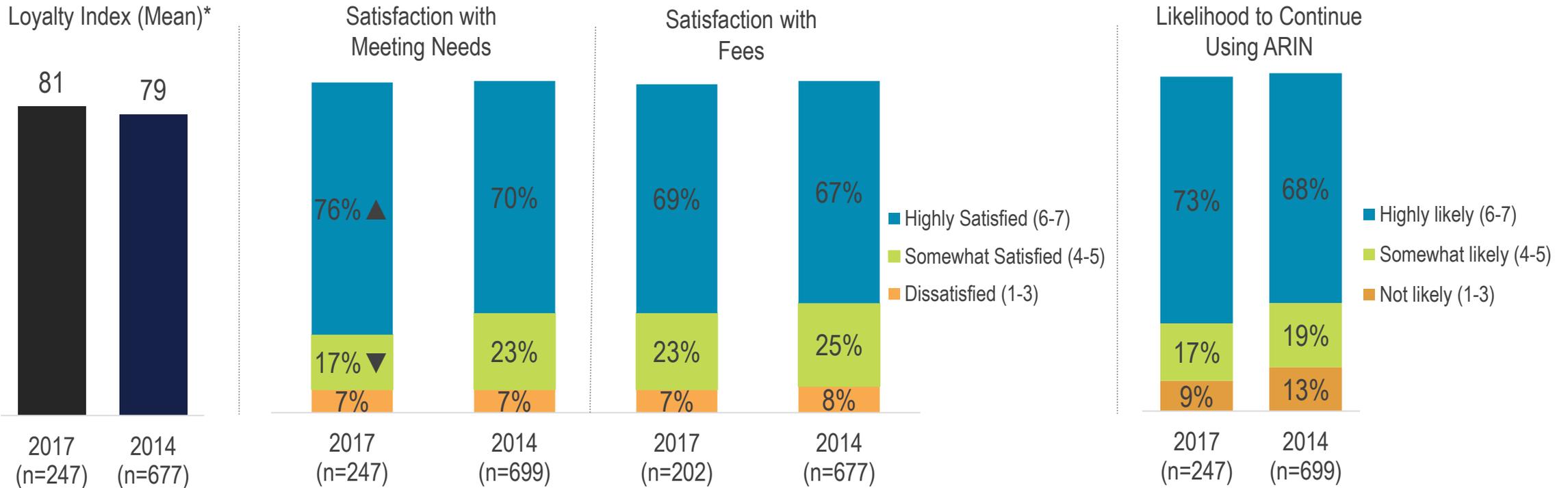
Q2. How satisfied are you with the value you receive from ARIN based on the fees you pay?

Q3. If you had the option to choose another registry services provider, how likely would you be to continue using ARIN services?

# ARIN continues doing a good job meeting the needs of its community; satisfaction is up from 2014, with over three-fourths satisfied that the organization is meeting their needs

- Those more familiar with ARIN are more highly satisfied (6 or 7 on 7-point satisfaction scale) with ARIN meeting their needs than those who are less familiar with ARIN (82% compared to those who aren't familiar at 67%).
- Consistent with 2014, Non-ISPs are also more satisfied with the fees they pay compared to ISPs (74% to 59% of ISPs).

## Overall Loyalty Metrics



\*Combines satisfaction with meeting needs, satisfaction with value, and likelihood to continue using equally into one measure

Note: numbers may not sum exactly to 100% due to rounding

Q1. Thinking about your interactions with ARIN and the products and services it provides, how satisfied are you with ARIN in meeting your organization's needs?

Q2. How satisfied are you with the value you receive from ARIN based on the fees you pay?

Q3. If you had the option to choose another registry services provider, how likely would you be to continue using ARIN services?

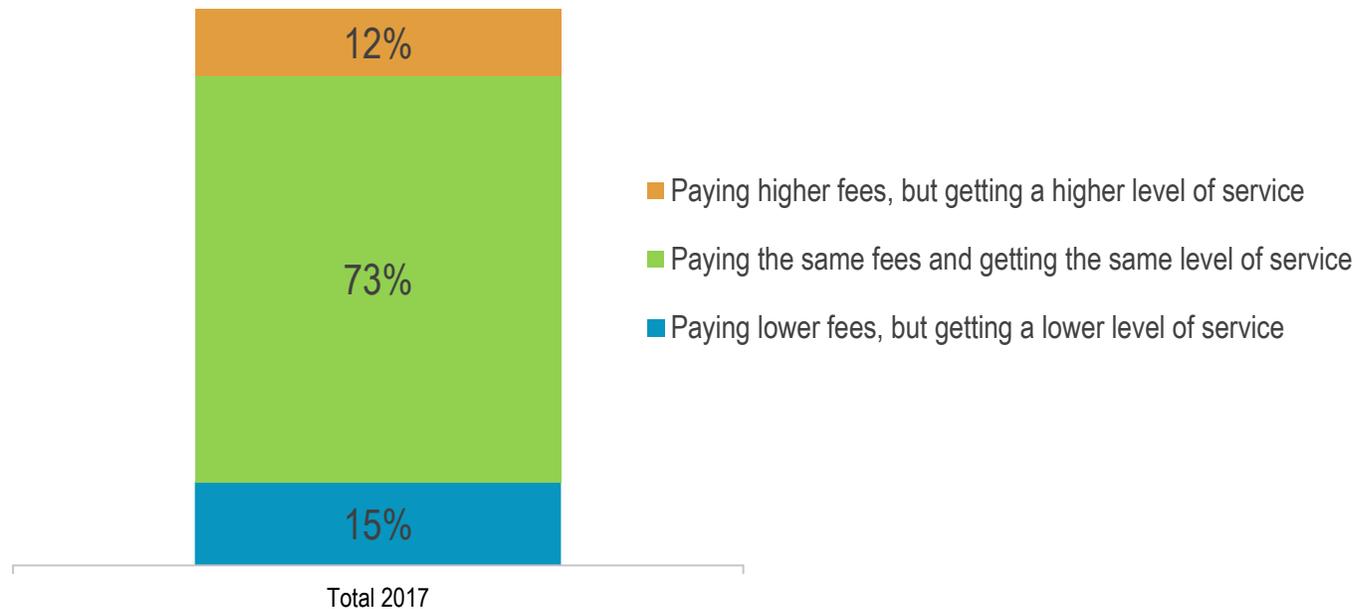
▲ ▼ denotes significantly higher/lower than 2014

# The majority prefer to continue paying the same fees and getting the same level of service

- Non-ISPs are more likely to prefer paying higher fees in exchange for higher levels of service than ISPs (15% compared to ISPs at 4%).

## ARIN's Fees and Level of Service

(n=247)



Q20. Thinking about the fees ARIN charges and the level of service it provides, if you had to choose, would you prefer:  
\*Note: No trending data shown for new questions/additions

Highly satisfied community members mention that ARIN is able to meet their needs and is easy to work with; those with lower satisfaction cite difficulty working with ARIN's staff to meet their business needs in a timely manner.

## Reasons for High Overall Satisfaction

(6 or 7 on 7-point Satisfaction Scale)

*"ARIN is easy to work with and responsive to tickets."*

*"The site is easy to navigate, the rules are clear and concise, and tech support is AMAZING !!"*

*"ARIN has been able to meet all of my needs, the only reason for 6 would be that sometimes requests can sit for days without response."*

*"I think there is always room for improvement but overall I think you do a very good job."*

*"ARIN does everything I need. The web based procedures are a bit convoluted but once you figure them out, they are okay. Plus you are very kind and helpful on the phone when I get confused."*

*"ARIN has a straightforward role in providing IP assignments and does a good job at organizing that process. Could be improved with policy changes to which I need to address the organization members."*

## Reasons for Low Overall Satisfaction

(1 or 2 on 7-point Satisfaction Scale)

*"You have the ability to turn a simple request into a drawn out fiasco."*

*"ARIN has the worst customer support I've ever encountered. Their process and [procedures] are overly complex and difficult to navigate. The web front end is painfully slow and outdated."*

*"ARIN charges ridiculous fees for ipv6 addressing, it needs to stop robbing small business owners for the "privilege" of being assigned a nearly limitless resource."*

*"A few reasons. Response times are a little slow. The time it takes to do some of the most basic functions are a little slow. The ticketing process is cumbersome and slow. The use of funds for conferences, conventions and publications, for instance voting, elections, etc., seem wasteful and completely unnecessary. The barrage of emails, calls and snail mail reminders during the election process are at best, annoying. One email or a notice on the website would suffice."*

Allowing organizations to manage their resources more easily, and offering flexibility in obtaining more IPv4 addresses are a few suggestions for ARIN to improve their services.

## How ARIN Can Better Serve Organizations in the Caribbean

*“ARIN should be reclaiming unused IPv4 resources from large companies and redistribute them to newer ASes that are in need of those.”*

*“As a multinational company with worldwide presence we would like to have the ability to get charged in our home country and not to have a local US based contact just for billing.”*

## Wish ARIN Enabled Me to...

*“Get more IPv4 addresses.”*

*“Allow me to manage my resources more easily.”*

*“Easily provide IPv6 resources for lower fees.”*

*“I wish that whois requests from ARIN would query another RIR directly and provide me information - rather than just directing me to another RIR's whois.”*

*“Training and outreach. I'll often use the website and training opportunities of the other RIRs (RIPE and APNIC specifically) to learn about things like RPKI. I've seen an improvement in the past 1-2 years, especially in documentation. I'd like to see more formal training of ARIN services.”*

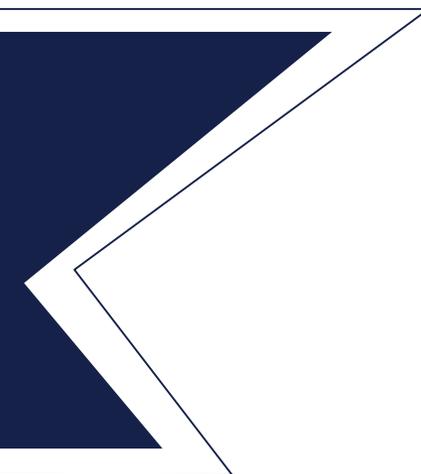
*“Have a reasonable way to change POC if the email address is obsolete.”*

*“It would be nice to get certifications showing my understanding of internet technology from ARIN.”*

*“Find out more about the owner of an IP to investigate hacking attempts.”*

A background of a network diagram with white nodes and lines on a light blue gradient.

# Performance & Expectations



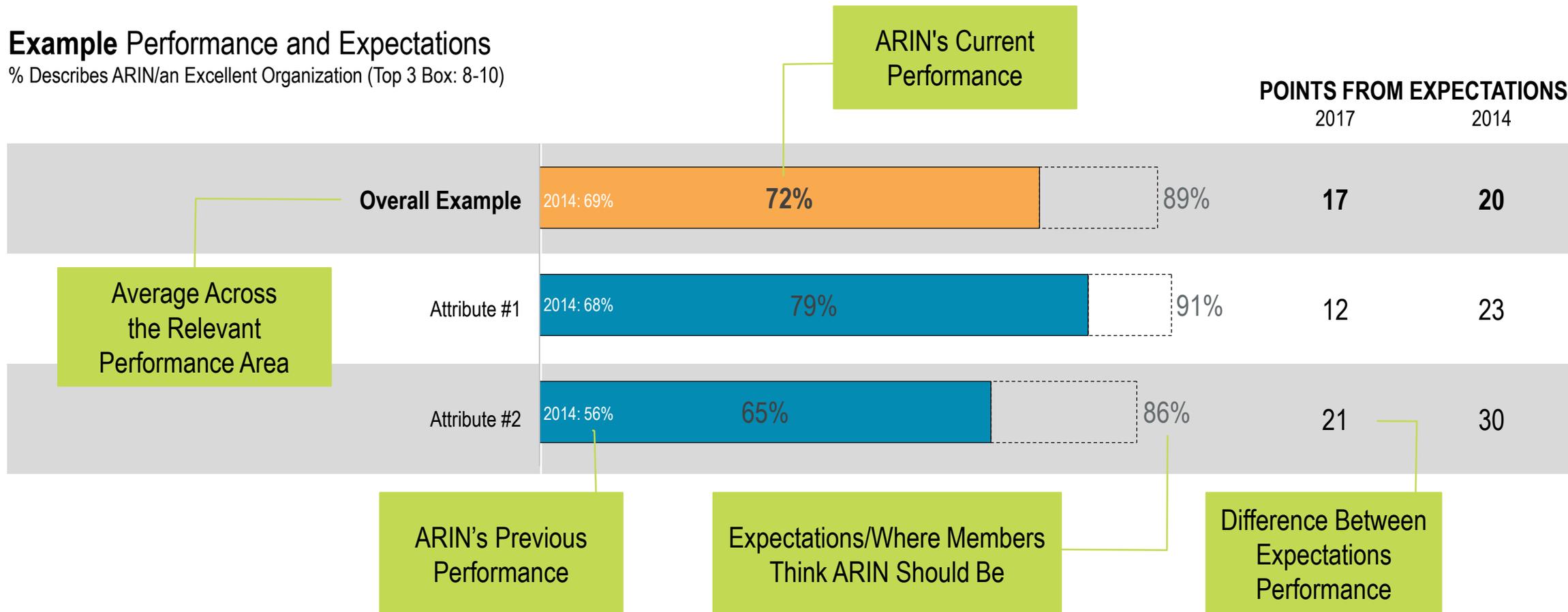
# Overview of How Performance and Expectation are Measured

- A scorecard was developed by capturing perceived performance and expectation on 34 specific attributes grouped into 9 dimensions: Policy Development (6 items), Registration Services (5), Engineering (4), Financial Services (2), Communications/Outreach (6), ARIN Meetings (3), Customer Service (5), and Internet Governance (2), and Security (1).
- For each of the 34 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 nine dimensions.
- The following pages report the scorecard results, starting with the high level view across the 9 dimensions.

# How to Read Scorecard Results

## Example Performance and Expectations

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



Note: Data not real

Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014

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.

Since 2014, ARIN has improved on all service dimensions. In particular, ARIN has exceeded expectations in performance of Internet Governance, and nearly meets expectations for Security and Policy Development. However, the greatest improvement opportunity lies in Customer Service, where expectations are high.

## Overall Performance and Expectations

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

		POINTS FROM EXPECTATIONS	
		2017	2014
<b>Overall**</b>	2014: 76% <b>83%</b> 85%	<b>2</b>	<b>12</b>
Internet Governance	2014: 81% <b>87%</b> 80%	-7	<b>7</b>
Security	<i>Not asked*</i> <b>88%</b> 89%	1	<i>Not asked*</i>
Policy Development	2014: 74% <b>82%</b> 83%	1	13
Financial Services	2014: 83% <b>86%</b> 88%	2	10
Engineering	2014: 79% <b>85%</b> 87%	2	10
Communication Outreach	2014: 70% <b>79%</b> 83%	4	17
ARIN Meetings	2014: 65% <b>77%</b> 81%	4	12
Registration Services	2014: 77% <b>82%</b> 88%	6	14
Customer Service	2014: 79% <b>83%</b> 90%	7	13

\*\*Overall metrics calculated excluding 'Security' because it was a new addition

Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014 \*Note: No trending data shown for new questions/additions

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.

Internet Governance is ARIN's greatest strength. ARIN exceeds expectations for an excellent provider in supporting efforts to keep Internet number registries self-regulated and taking an appropriately active role in Internet governance.

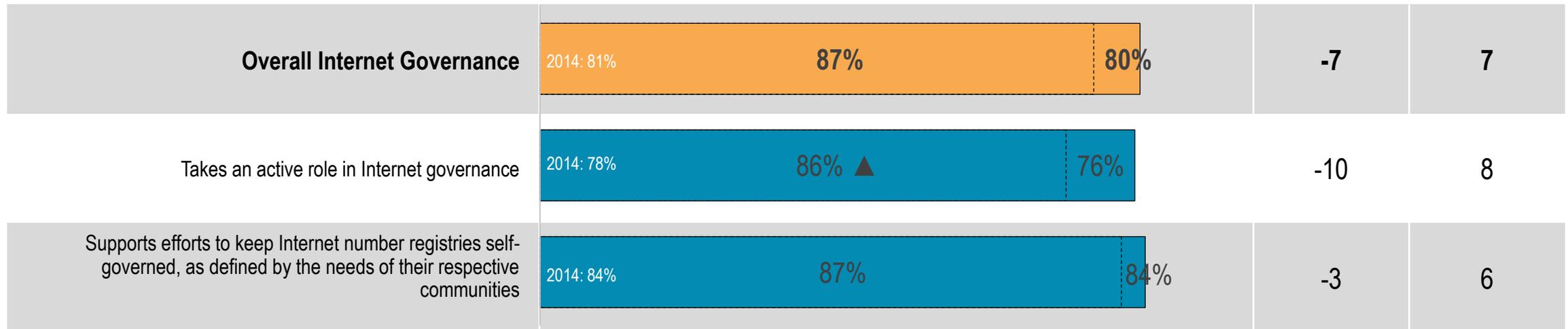
## Internet Governance Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014

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.

# ARIN nearly meets community expectations of an excellent provider to ensure a high level of security

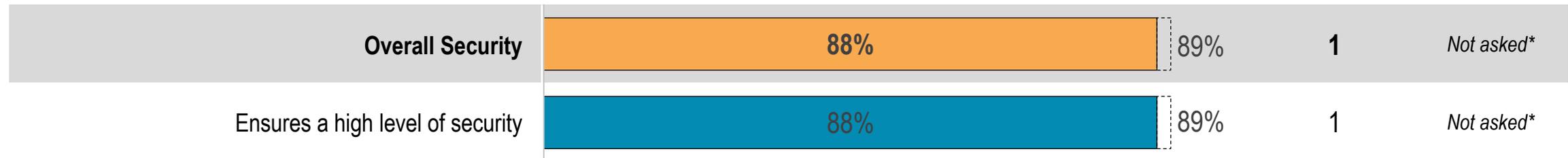
## Security Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



Dashed lines show expectations \*Note: No trending data shown for new questions/additions

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.

ARIN's performance on Policy Development improved for nearly all attributes since 2014. Most notably, ARIN exceeds expectations for implementing policy that adheres to what is developed/ratified and ensuring the advisory council is effective in facilitating the Policy Development Process. ARIN also closed a 14 point gap from 2014 and is now meeting expectations for the board being effective in their oversight of the Policy Development Process.

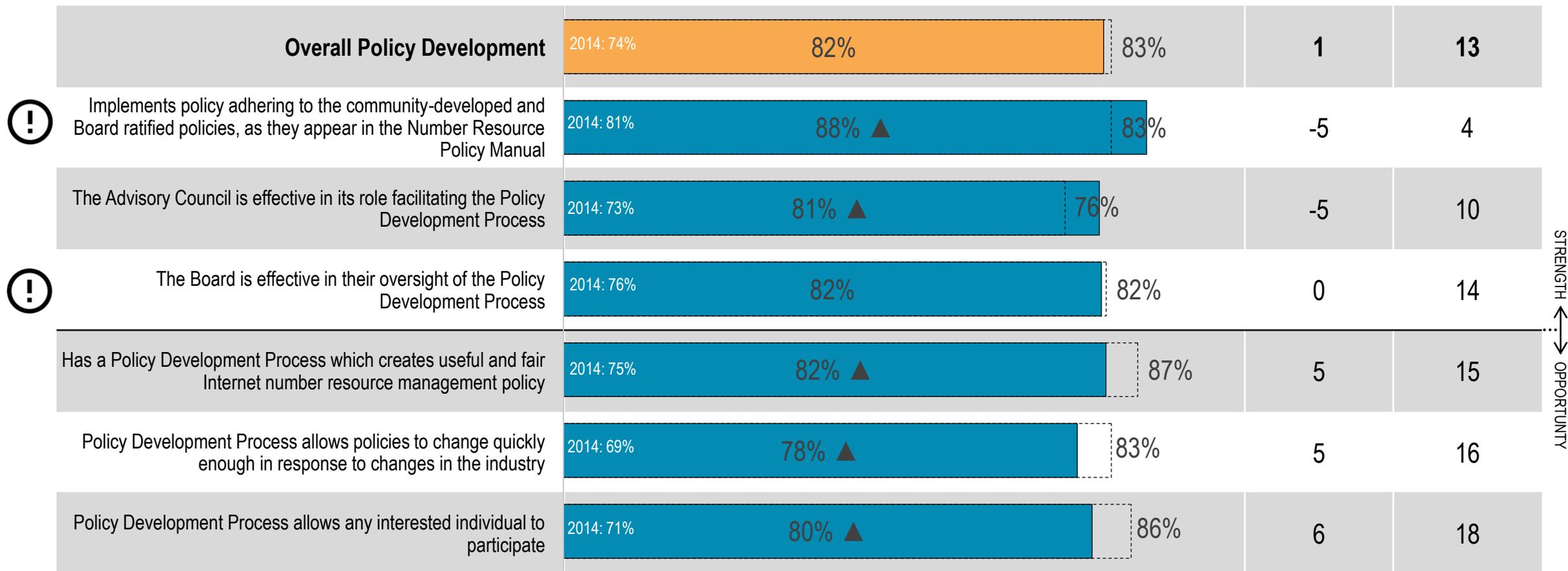
## Policy Development Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014 ! denotes relative high importance

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.

Financial Services is another strength for ARIN, with performance meeting expectations in clarity of invoicing and payment procedures. Providing timely and appropriate responses for billing and administration inquiries has some room for improvement.

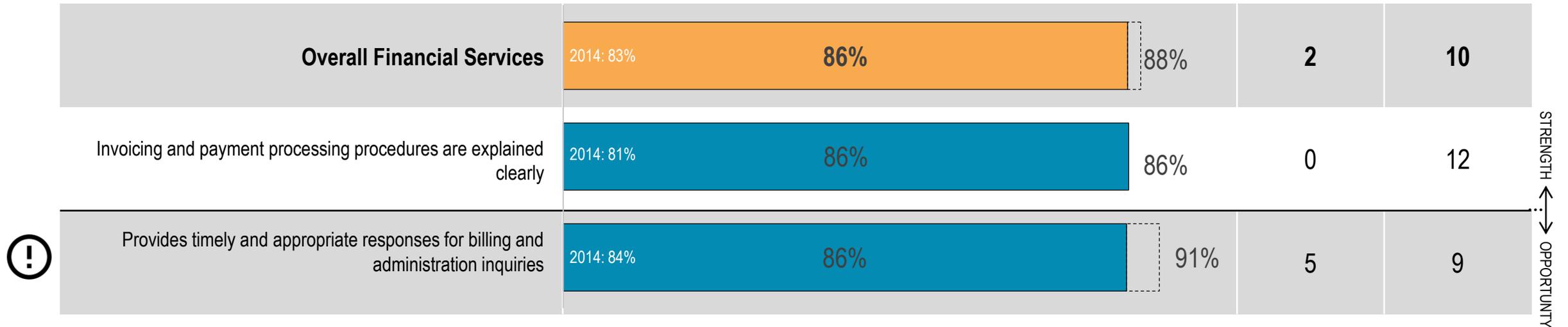
## Financial Services Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014 ⓘ denotes relative high importance

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.

ARIN also closed the expectation gap for Engineering, with performance now exceeding expectations on the quality and reliability of technical services. Ease of understanding tools and resources (WHOIS, WhoWas, DNC, etc.) has the most room for improvement.

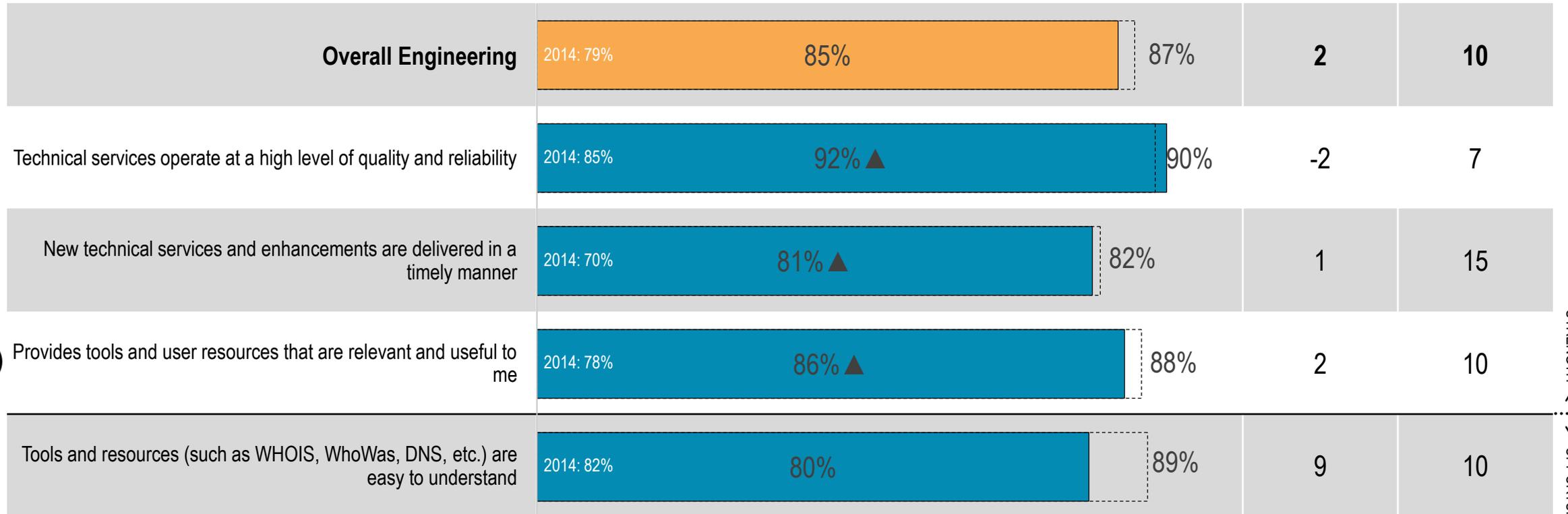
## Engineering Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



STRENGTH ↑  
↓ OPPORTUNITY

Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014 ⓘ denotes relative high importance

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.

Since 2014, ARIN has made significant strides in Communication/Outreach, particularly in offering sufficient opportunities to obtain customer and member feedback and being transparent; however, performance still falls short of expectations in terms of having an easily navigable website and communicating in a way that meets members' needs.

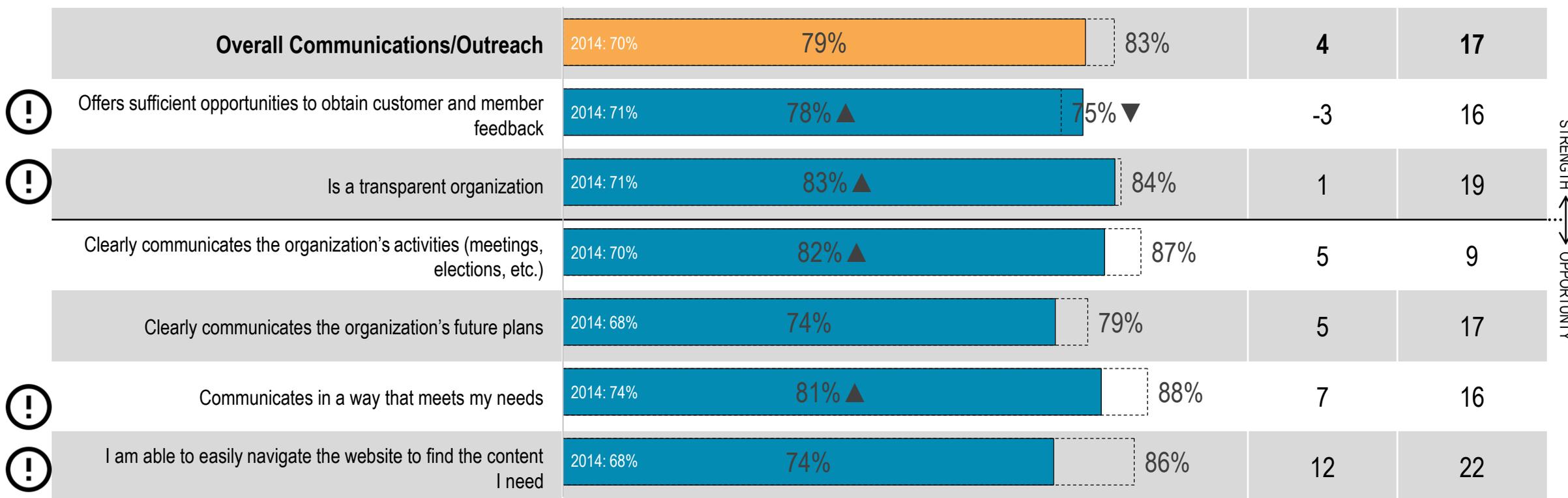
## Communications/Outreach Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014 ! denotes relative high importance

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.

ARIN Meetings improved from 2014 due to an easier to understand election process and more engaging meeting content, but members expect the election process for the Board and Advisory Council to be more transparent.

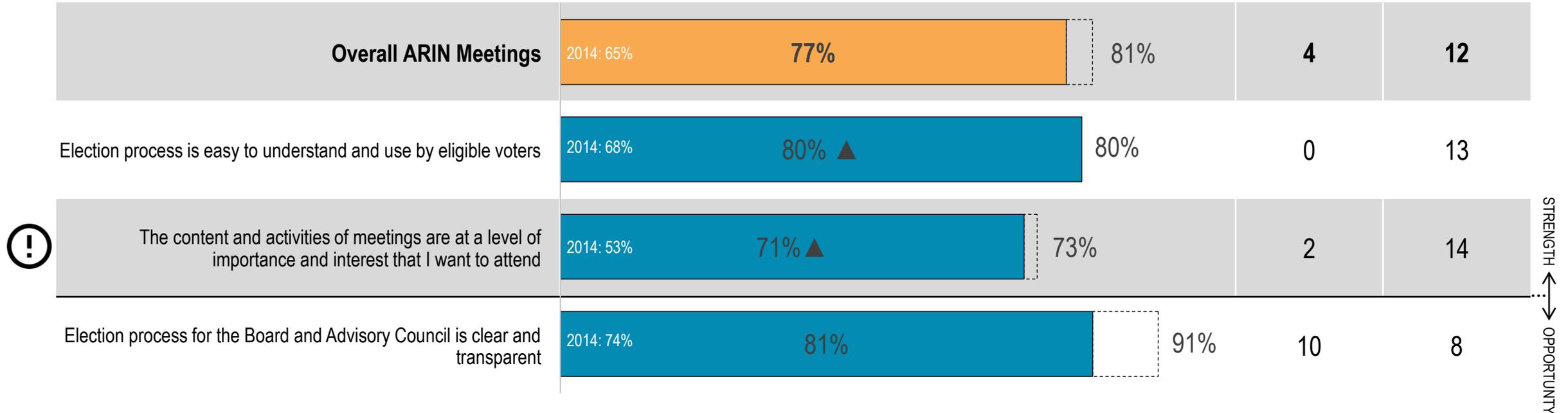
## ARIN Meetings Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014 ! denotes relative high importance

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.

Registration Services remains a key opportunity, with the quality and reliability of transfer listing services and timeliness of transfer requests needing the most improvement. The process to obtain number resources could also be clearer, though ARIN's performance in this area has clearly improved since 2014.

- There are significant differences in how companies of different sizes perceive the quality, usability, and reliability of transfer listing services. Small companies, with less than 100 employees, are significantly less likely to feel ARIN's transfer listing service operates at a high level of quality/reliability (72% compared to companies with over 100 employees at 89%).

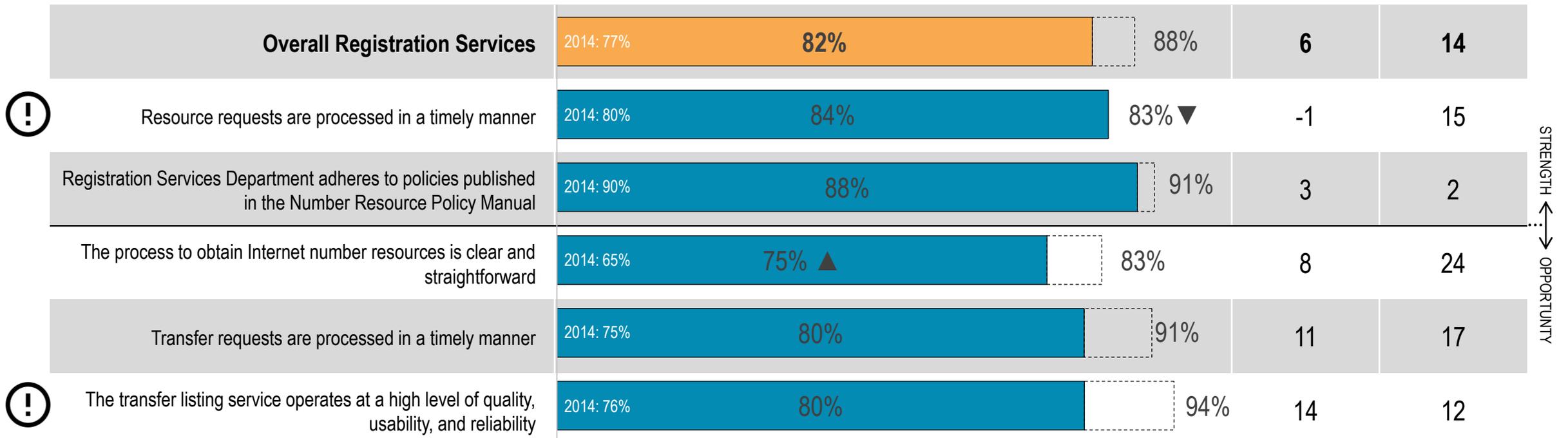
## Registration Services Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014 ! denotes relative high importance

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.

Customer Service is doing a better job of providing clear/accurate information and resolving complex issues compared to 2014, but the timeliness of responses to requests still performs well below the high expectations of customers and members.

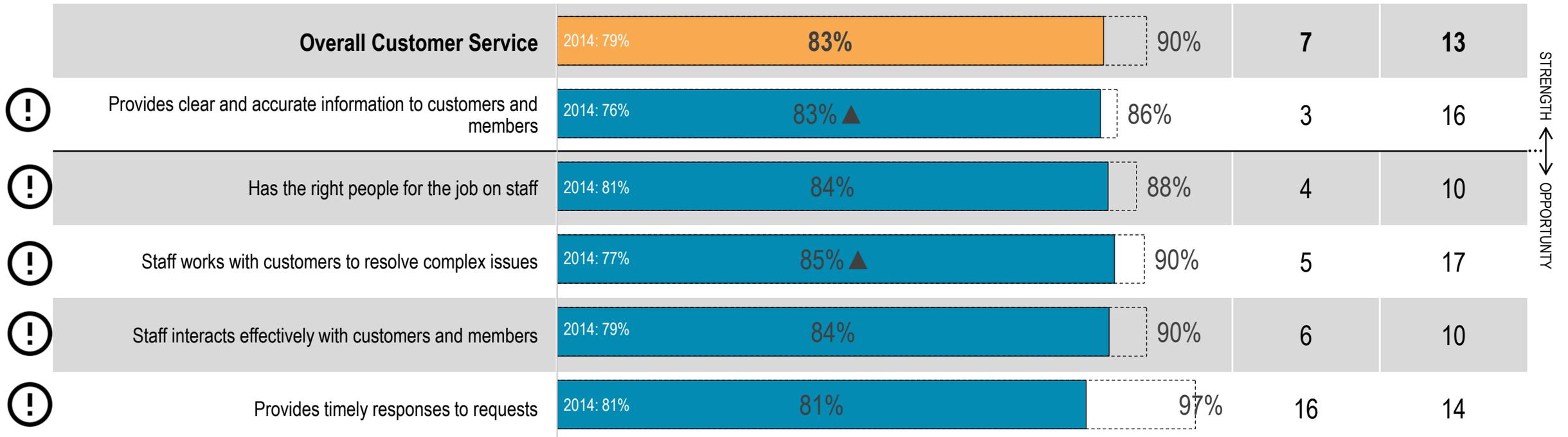
## Customer Service Performance and Expectations

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

### POINTS FROM EXPECTATIONS

2017

2014



Dashed lines show expectations ▲ ▼ denotes significantly higher/lower than 2014 ! denotes relative high importance

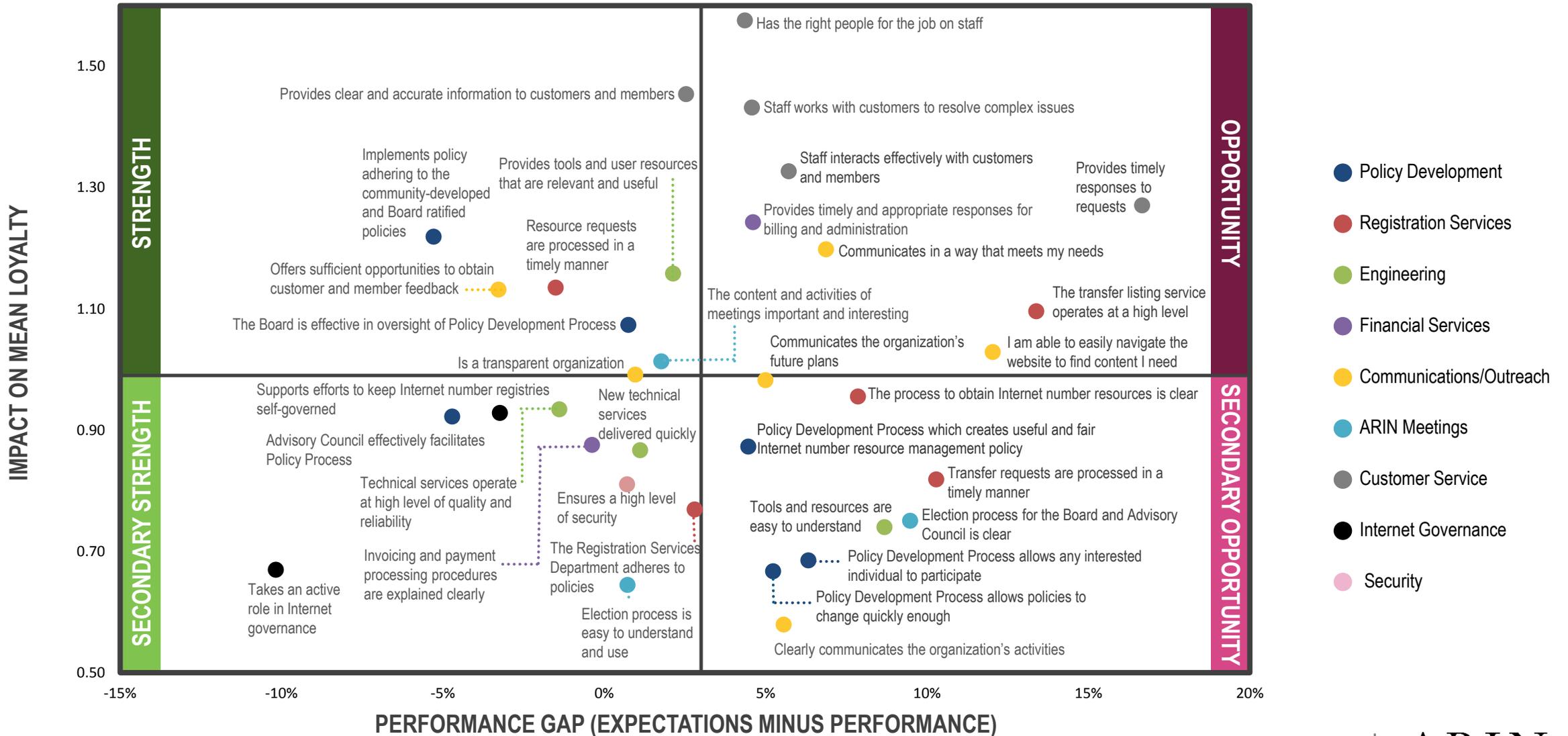
Q4. The following is a list of features you may expect from ARIN or a professional organization with a similar purpose. For each feature below, please provide two ratings:

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.

# Identifying Priorities: How to Read Quadrants

- A quadrant map classifies different performance attributes by their level of priority. Each of the 34 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
- The quadrant map on the following slide is divided into four areas:
  - **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 gaps) – these areas could be problems if not addressed, but are not priorities

ARIN's strengths center around effective oversight of the policy development process and implementation of policy, as well as providing opportunities for member/customer feedback, and processing resource requests in a timely manner. Key opportunities include providing timely responses to requests, the transfer listing service operating at a high level, and ease of navigating the website.



Wording of some features has been shortened due to space constraints. See following slides for full feature text.

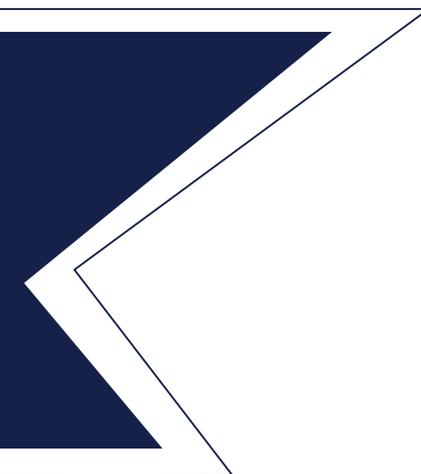
Effective board oversight, timely resource request processing, transparency, and providing clear/accurate information shifted from opportunities in 2014 to strengths, while some former strengths (transfer listing service quality, effective staff interaction, timely/appropriate response to billing inquiries, and having the right people for the job) have become opportunities.

## Quadrant Change Summary

STRENGTH	● The Board is effective in their oversight of the Policy Development Process	○ Communicates in a way that meets my needs	OPPORTUNITY
	● Resource requests are processed in a timely manner	○ Provides timely responses to requests	
	● Is a transparent organization	○ Staff works with customers to resolve complex issues	
	● Provides clear and accurate information to customers and members	● I am able to easily navigate the website to find the content I need	
	● Offers sufficient opportunities to obtain customer and member feedback	● Transfer listing service operates at a high level of quality, usability, and reliability	
	● The content and activities of meetings are at a level of importance and interest that I want to attend	● Staff interacts effectively with customers and members	
	○ Implements policy adhering to the community-developed and Board ratified policies	● Provides timely and appropriate responses for billing and administration inquiries	
	○ Provides tools and user resources that are relevant and useful to me	● Has the right people for the job on staff	
SECONDARY STRENGTH	● New technical services and enhancements are delivered in a timely manner	● Policy Development Process creates useful/fair Internet number resource management policy	SECONDARY OPPORTUNITY
	● Election process is easy to understand and use by eligible voters	● Policy Development Process allows policies to change quickly in response to industry changes	
	○ Registration Services Department adheres to policies published in Number Resource Policy Manual	● The process to obtain Internet number resources is clear and straightforward	
	○ Technical services operate at a high level of quality and reliability	● Transfer requests are processed in a timely manner	
	○ Invoicing and payment processing procedures are explained clearly	○ Clearly communicates the organization's future plans	
	○ Takes an active role in Internet governance	○ Policy Development Process allows any interested individual to participate	
	● The Advisory Council is effective in its role facilitating the Policy Development Process	● Tools and resources (such as WHOIS, WhoWas, DNS, etc) are easy to understand	
	● Supports efforts to keep Internet number registries self-governed	● Election process for the Board and Advisory Council is clear and transparent	
- Ensures high level of security ( <i>not asked in 2014</i> )	● Clearly communicates the organization's activities		

A background graphic featuring a network of white nodes connected by thin white lines, set against a light blue gradient. The nodes are scattered across the upper half of the image, creating a sense of interconnectedness and data flow.

# Perceptions & Positioning

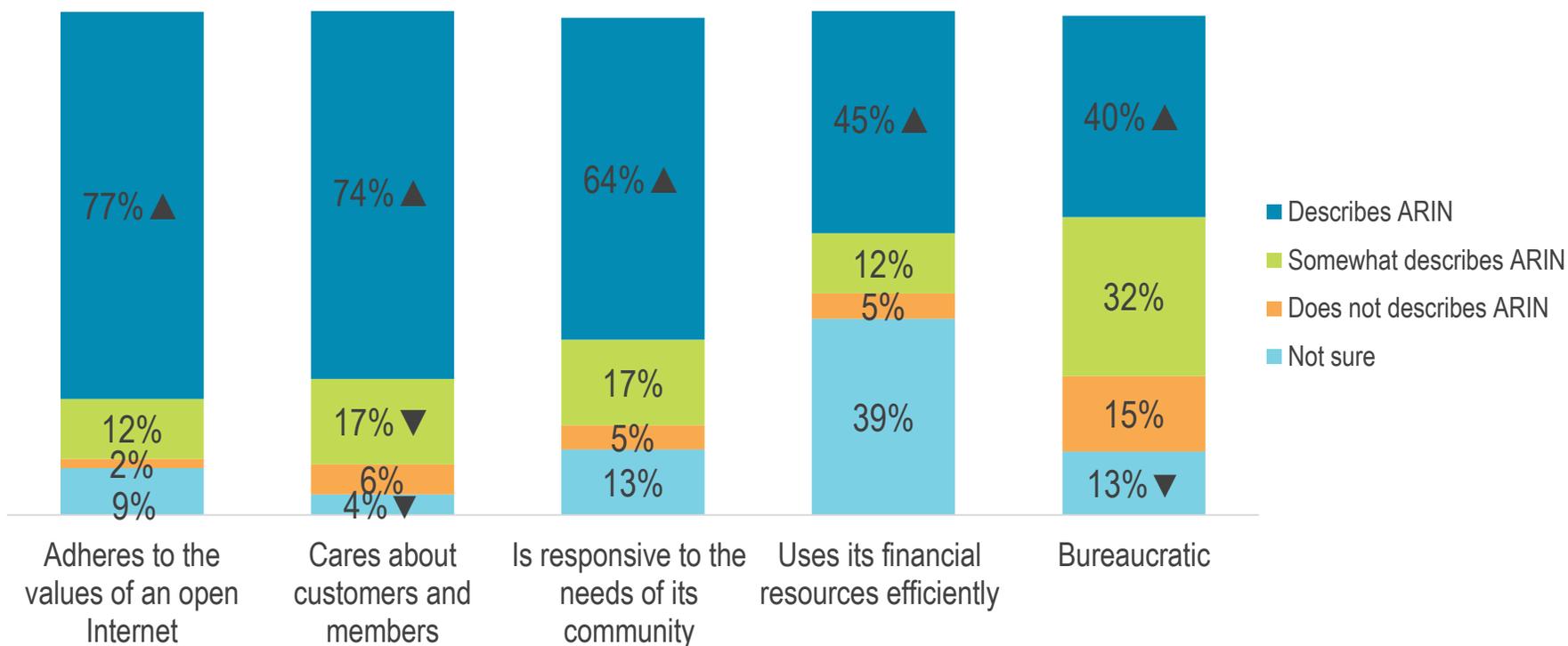


A majority of community members believe ARIN adheres to the values of an open internet and cares about its members and customers. Less than half believe ARIN uses its financial resources effectively, but this is largely due to uncertainty around this area, not negative perceptions.

- Those more familiar with ARIN tend to have more positive perceptions about its image.

### Descriptions of ARIN

Total (n=247)



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 2014

Priorities for improving ARIN's image are in use of financial resources and responsiveness to the needs of its community; members/customers do not have negative perceptions towards either, but they are less likely to be familiar with ARIN's efforts in these areas.

### ARIN Image (n=699)

	Priority Index*	Importance^	% Describes Well (8-10)
Uses its financial resources efficiently	1.5	27%	45%
Is responsive to the needs of its community	1.1	31%	64%
Cares about customers and members	0.6	23%	74%
Adheres to the values of an open Internet	0.3	13%	77%
Bureaucratic**	0.3	7%	40%

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

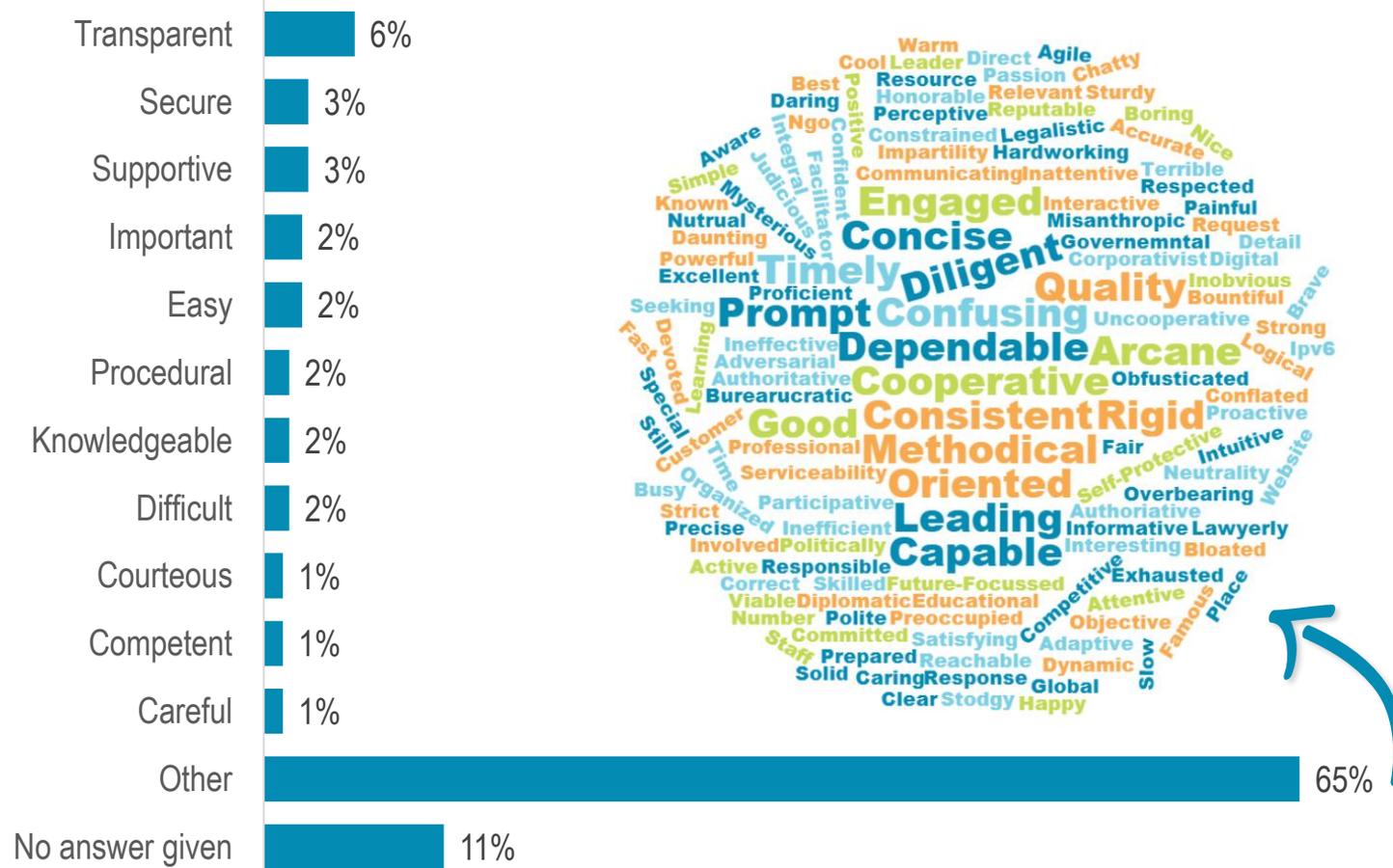
\*\*Given the negative connotation of "bureaucratic," % improvement is flipped (rated 8-10) for this attribute when input into the priority index calculation

^Based on correlation with likelihood to continue using ARIN in Q3 Q11. Please tell us how well the following statements describe ARIN.

▲ ▼ denotes significantly higher/lower than 2014

Perceptions of ARIN are generally positive, with 'transparent' being the most used adjective to describe ARIN.

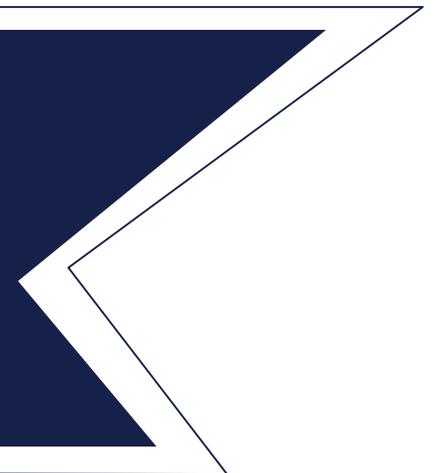
### Perceptions of ARIN



Q11a. We are interested in your perceptions of ARIN. What are three adjectives you would use to describe ARIN?  
 Note: numbers may not sum exactly to 100% due to rounding

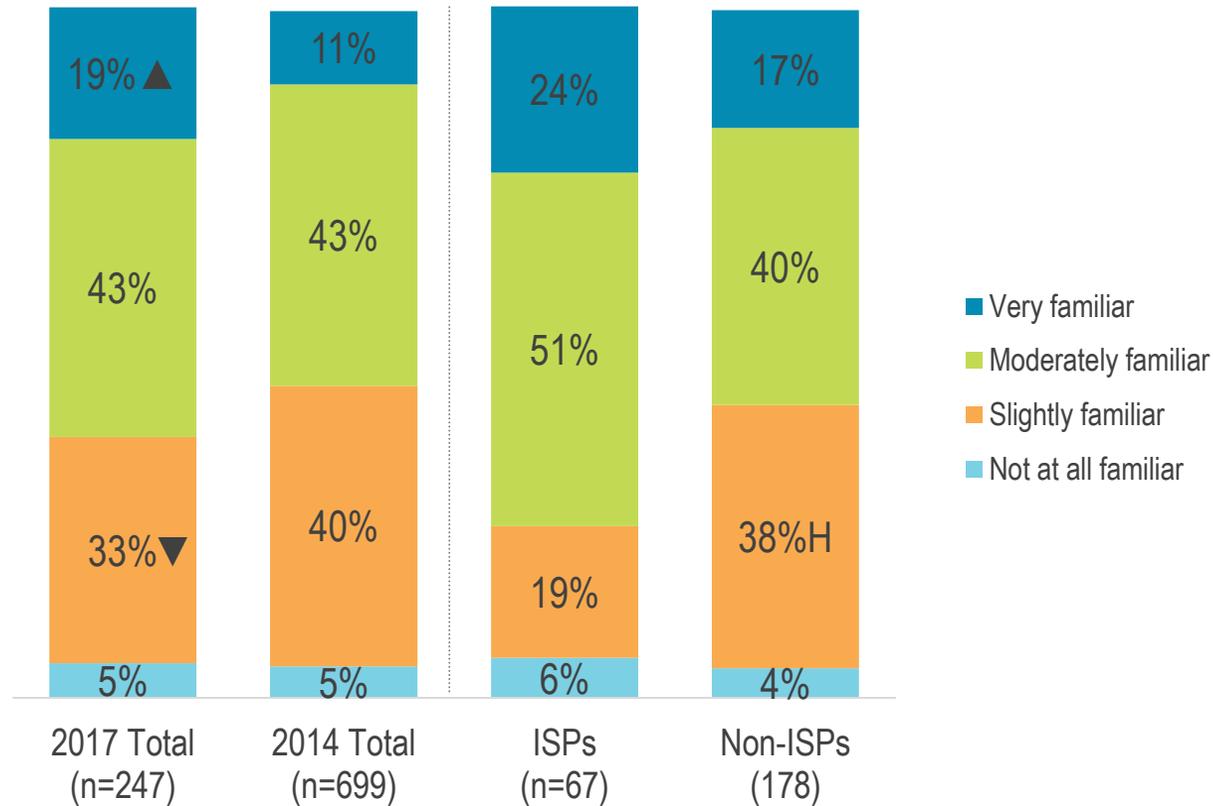
A background graphic featuring a network of white nodes connected by thin white lines, set against a light blue gradient. The nodes are scattered across the upper half of the image, creating a sense of connectivity and data flow.

# Familiarity & Usage of ARIN Products & Services



One fifth of community members are very familiar with ARIN, a significant increase from 2014.

### Familiarity with ARIN



Q6. How familiar are you with ARIN and its activities?

▲▼ denotes significantly higher/lower than 2014

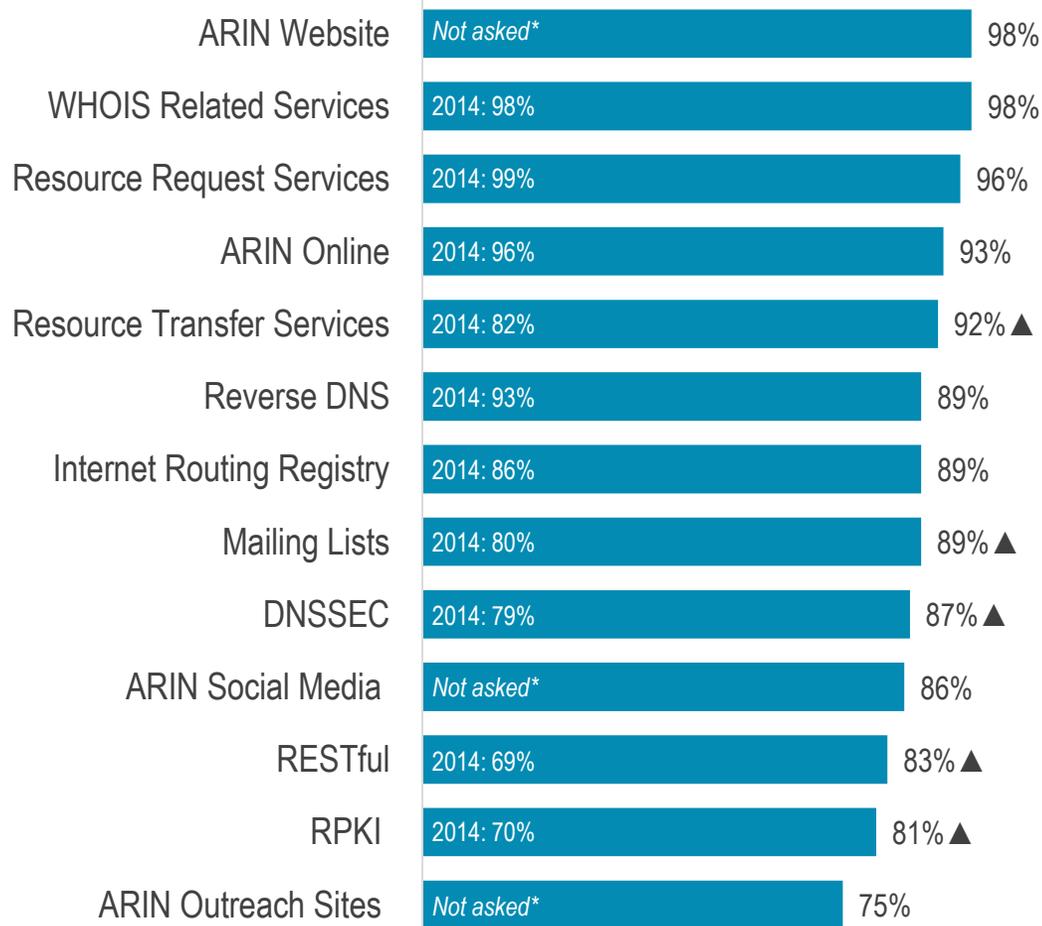
Note: numbers may not sum exactly to 100% due to rounding

Note: H indicates significantly higher than opposing group

The majority are familiar with every ARIN product or service. Familiarity is highest with the ARIN Website, WHOIS Related Services, and Resource Request Services, while Resource Transfer Services, Mailing Lists, DNSSEC, RESTful, and RPKI have experienced significant increases in familiarity since 2014.

### Familiarity with ARIN Products and Services

(n=247)

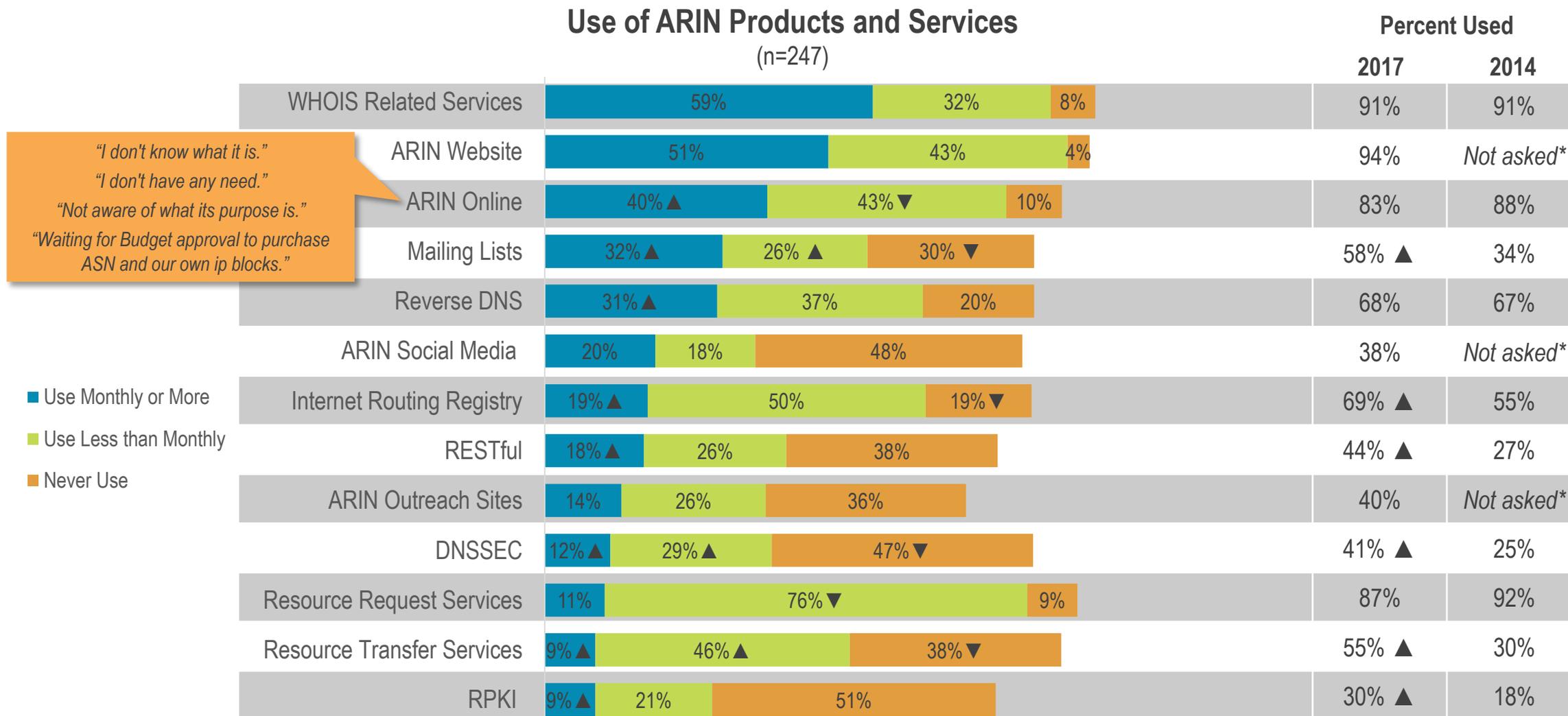


Q7. Below is a list of services and products developed by ARIN. For each one, please indicate how frequently you use each product or service (not familiar was an option)

▲ ▼ denotes significantly higher/lower than 2014

\*Note: No trending data shown for new questions/additions

WHOIS Related Services and the ARIN Website are the most frequently used ARIN services. Usage of several services has increased since 2014, namely Mailing lists and Resource Transfer Services, among many others.



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.

Q9a. Why haven't you used ARIN Online?

▲ ▼ denotes significantly higher/lower than 2014

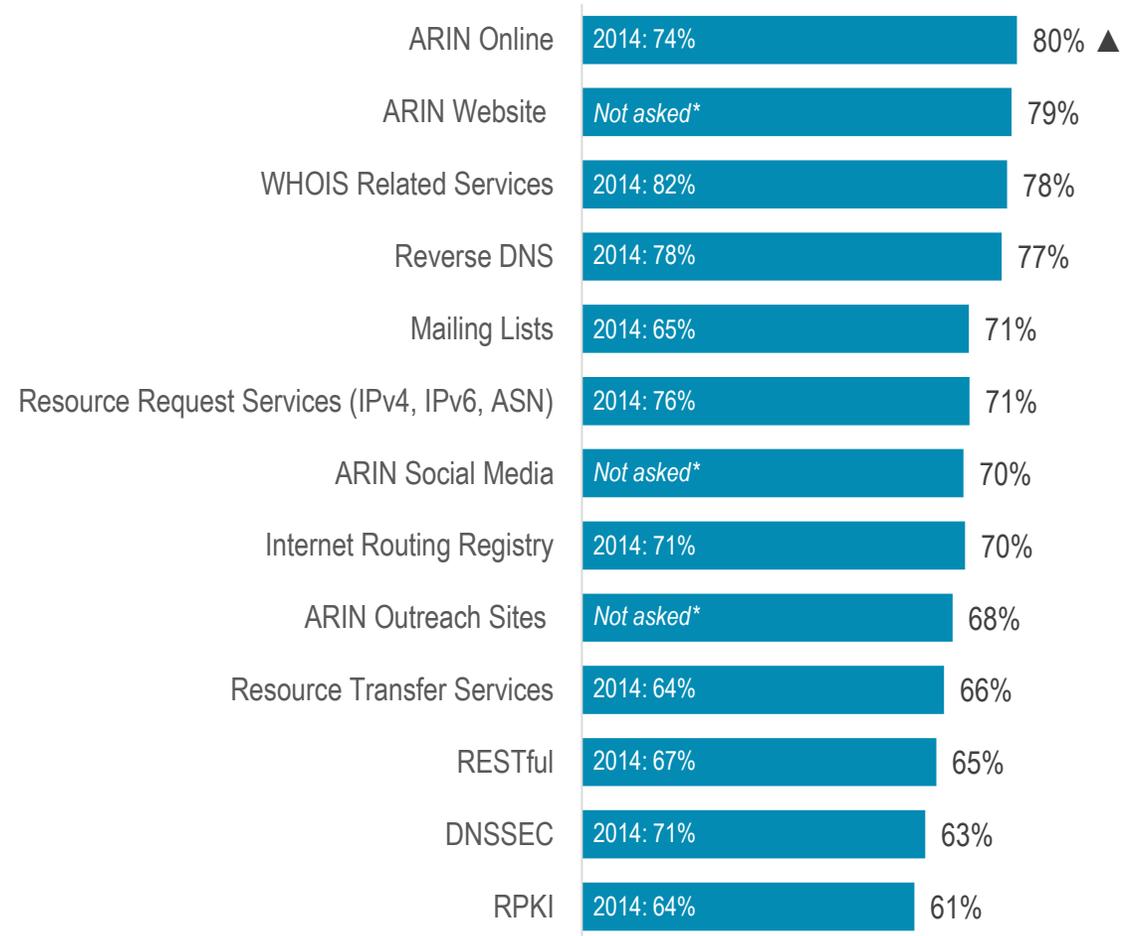
\*Note: No trending data shown for new questions/additions | Note: % not familiar not shown

Note: numbers may not sum exactly due to rounding

Satisfaction is high with ARIN's most frequently used products (ARIN Online, ARIN Website, and WHOIS Related Services), with satisfaction of ARIN Online increasing since 2014.

### Satisfaction with ARIN Products and Services - % Highly Satisfied (6-7)

Among those who have used product or service; n=74-232)



Q8. How satisfied are you with each of the following products and services offered by ARIN?

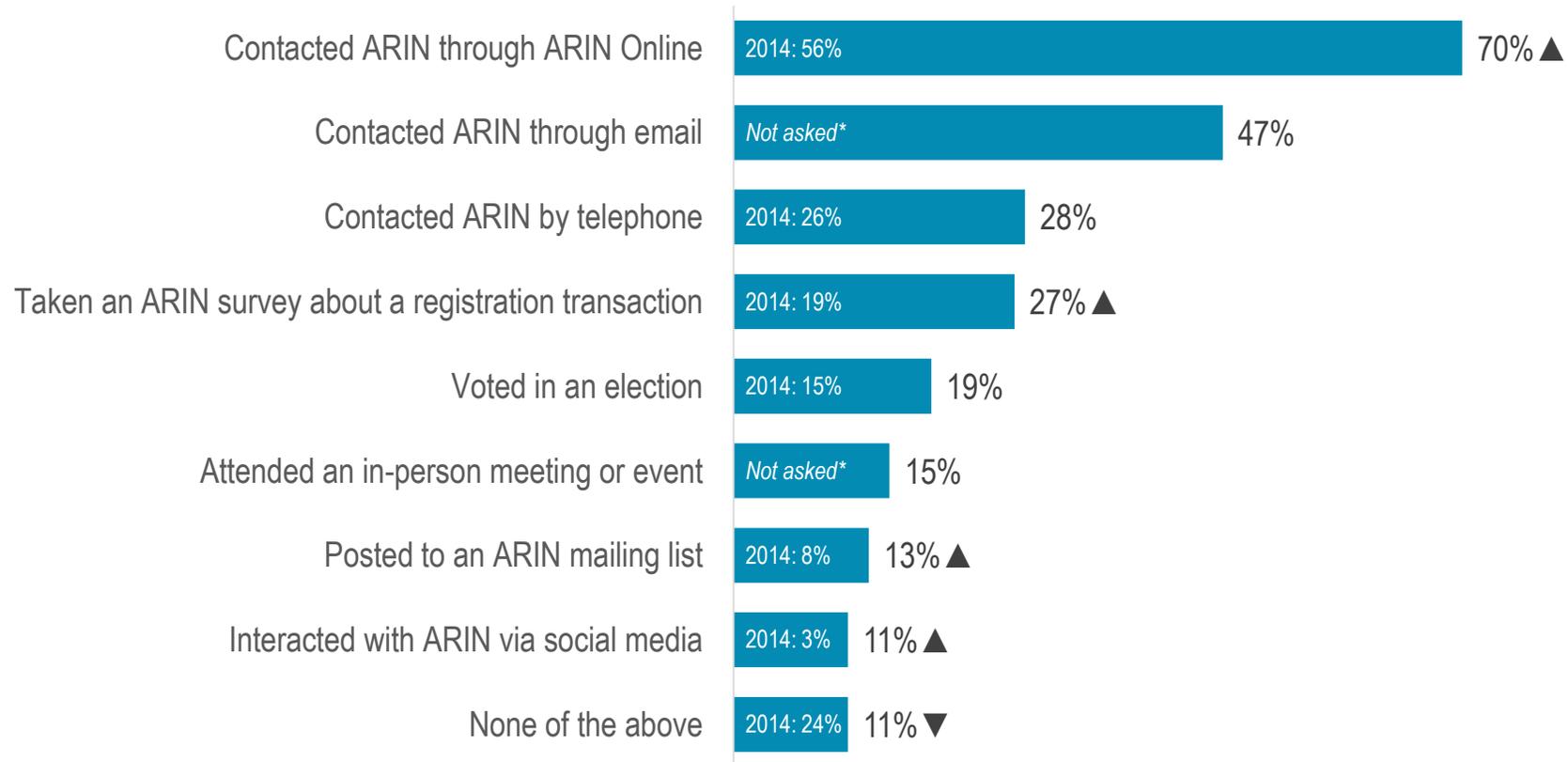
▲ ▼ denotes significantly higher/lower than 2014

\*Note: No trending data shown for new questions/additions

Virtual methods are still the most common ways members of the community contact ARIN; contact through ARIN Online is up from 2014 and is the most common type of contact members have with ARIN, followed by email.

### Contact with ARIN in the Past 12 Months

(n=247)



Q12. In the past 12 months, in which of the following ways have you contacted and/or interacted with ARIN? Please check all that apply

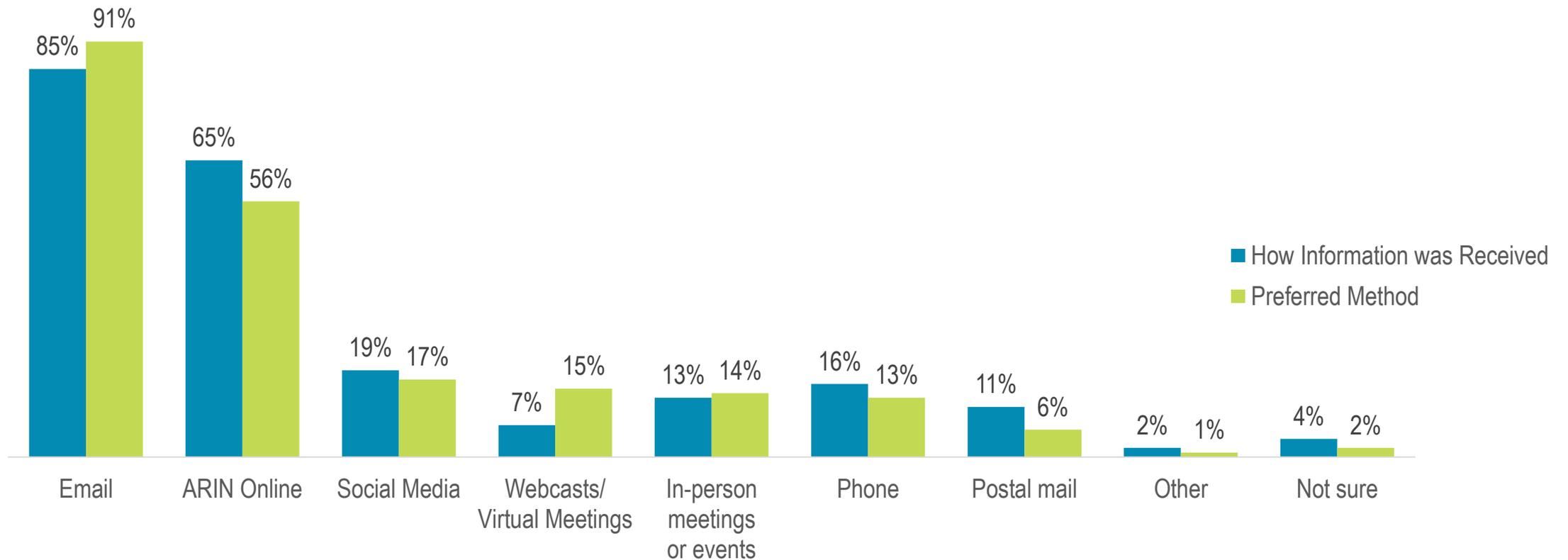
▲ ▼ denotes significantly higher/lower than 2014

\*Note: No trending data shown for new questions/additions

ARIN is delivering information and updates effectively, with email and ARIN Online being the most common ways members receive information and the most preferred.

### Current and Preferred Method of Receiving Information/Updates from ARIN

(n=247)

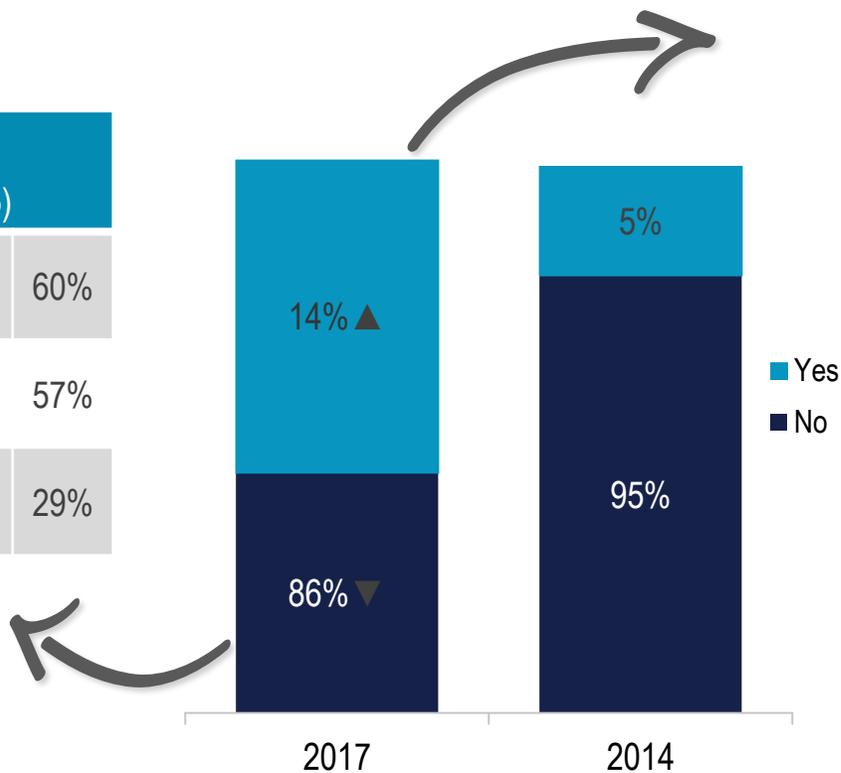


Q13a. In the past 12 months, in which of the following ways have you received information and/or updates from ARIN?  
Q13b. What are your preferred method(s) of receiving information and/or updates from ARIN? Please check all that apply.  
\*Note: No trending data shown for new questions/additions

Over a tenth of members have participated in the Policy Development Process in the last year; while still a minority, this represents a significant increase from 2014. The top reasons why community members do not participate are not knowing how to participate and not thinking they are eligible to participate

### Participation in the ARIN Policy Development Process in the Past 12 Months (n=247)

Method of Participation (Among those participating; n=35)	
Posted to the Public Policy Mailing List	60%
Attended a Public Policy and Members' Meeting – In-person	57%
Attended a Public Policy and Members' Meeting – Remotely (webcast)	29%



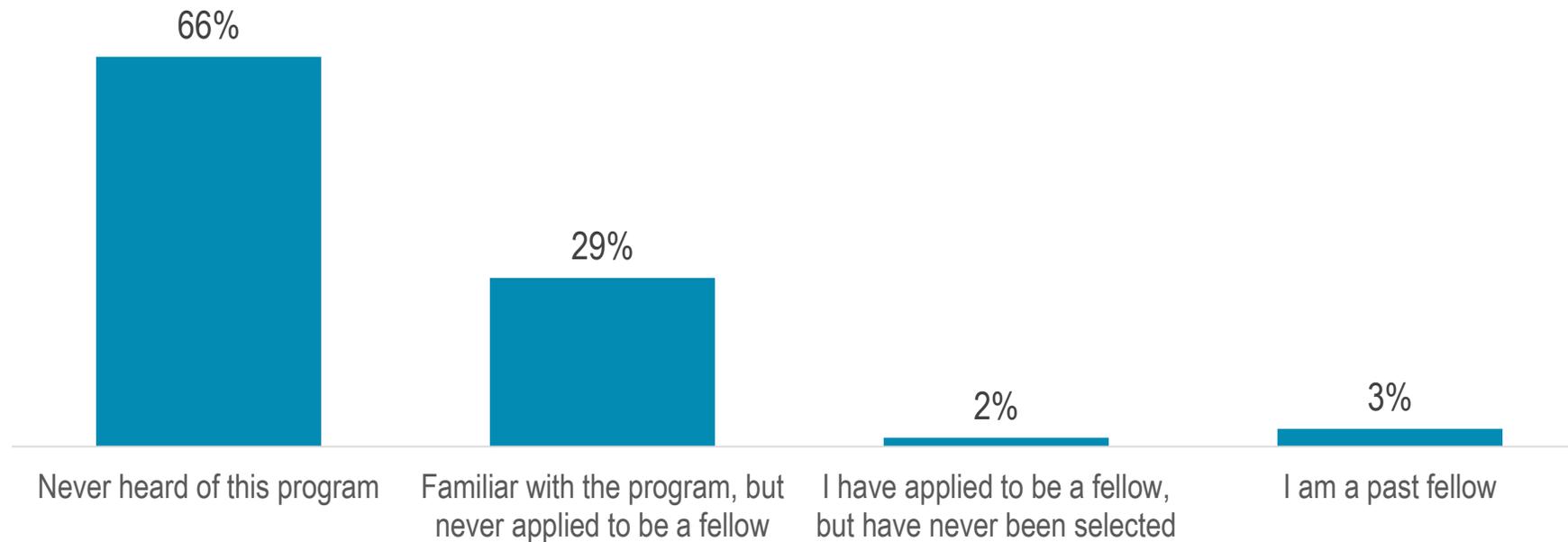
Reason for Not Participating (Among those not participating; n=212)	
I do not know how to participate	35%
I did not think I was eligible to participate	33%
I do not have time to participate	31%
I do not think I can have an impact on ARIN policy	21%
I am happy with ARIN policy and do not see a need to get involved	18%
I do not have the resources to participate	12% ▼
I do not have any interest in participating	12%

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 2014  
 \*Note: No trending data shown for new questions/additions

## There is low familiarity with the ARIN Fellowship Program, with almost two-thirds having never heard of the program

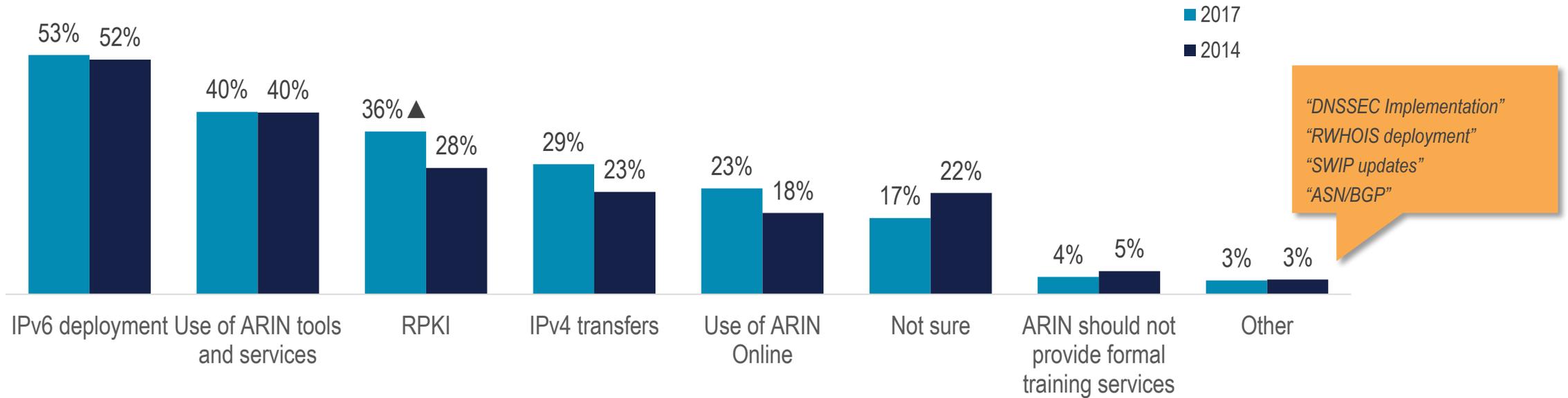
- Not surprisingly, members are more familiar with the fellowship program than customers (36% compared to customers at 21%).
- ISPs are also more familiar with the fellowship program than Non-ISPs (46% compared to Non-ISPs at 22%).

### Familiarity with the ARIN Fellowship Program (n=247)



There is increased interest in RPKI training since 2014, but IPv6 deployment and more information on how to use ARIN tools and services are still the most sought after training topics.

### Training Interest (n=247)



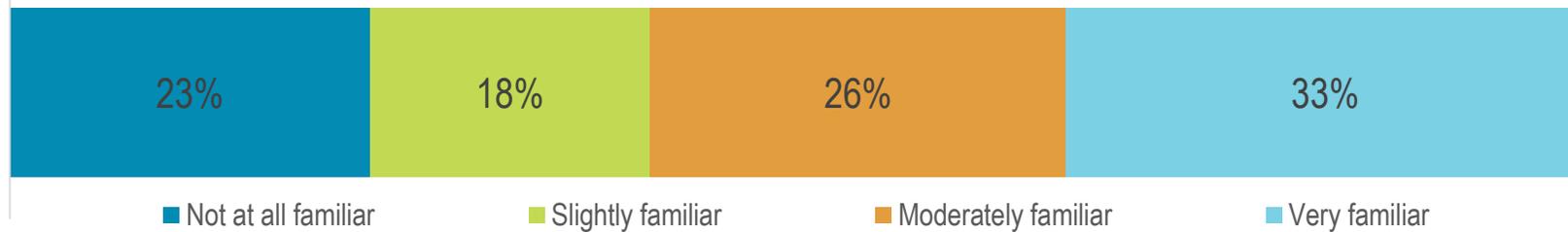
Q16. For which of the following topics would you be interested in formal training provided by ARIN? Please select all that apply.  
▲ ▼ denotes significantly higher/lower than 2014

3 in 10 are very familiar with ARIN's annual POC validation process, and almost half believe it is a critical process.

- Network engineers and those who work in management are more likely to feel that the POC validation process is critical compared to those who are system administrators (60% and 56% respectively compared to system administrators at 30%).

### Familiarity with ARIN's Annual POC Validation Process

(n=247)



### Importance of ARIN's Annual POC Validation Process

(n=247)



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?

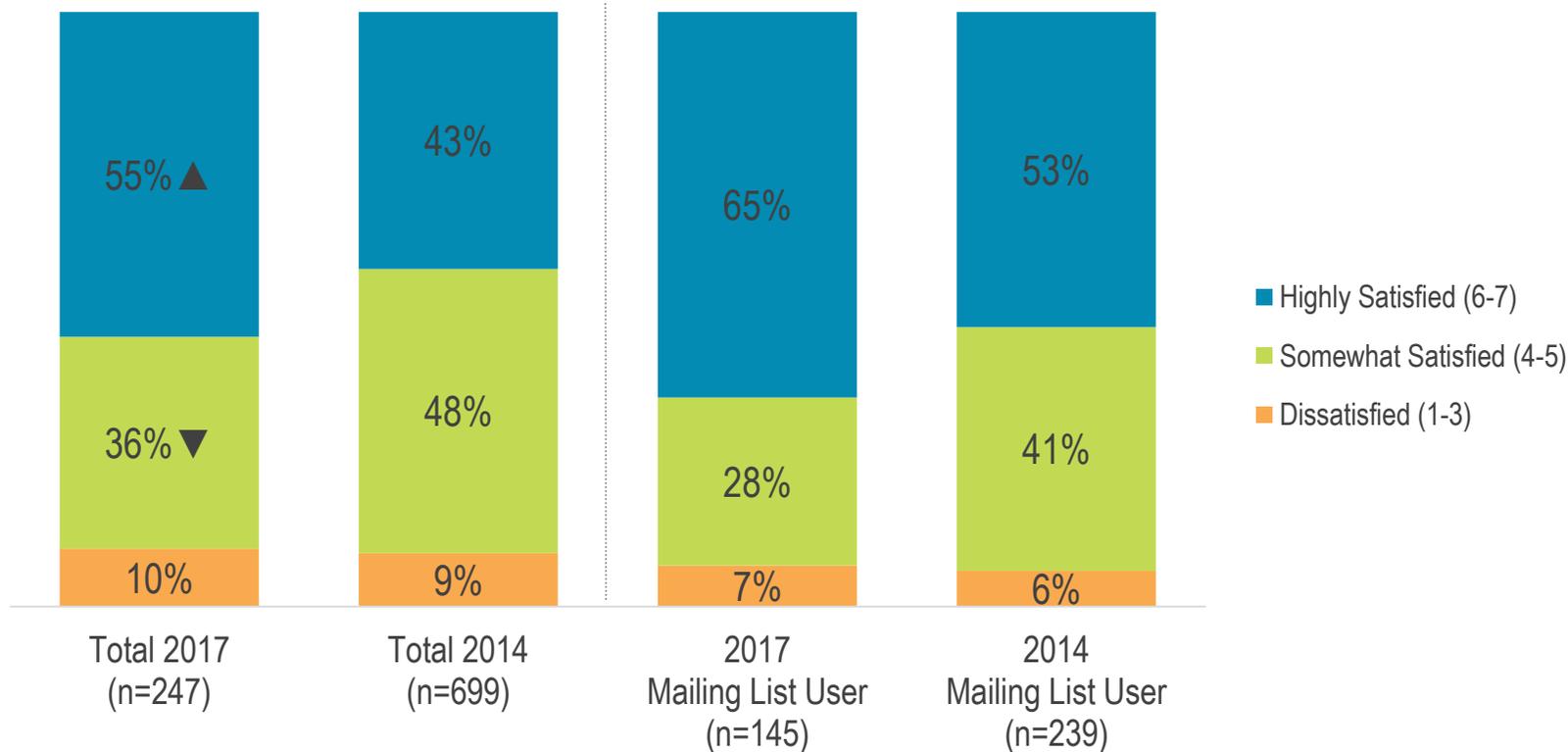
\*Note: No trending data shown for new questions/additions

Satisfaction with ARIN's mailing lists has increased since 2014; over half of all members/customers and two-thirds of users are highly satisfied with their ability to comment and participate using mailing lists.

### Mailing List Satisfaction

#### Mailing List Examples Shown in Survey

- ARIN Announce
- ARIN Discuss
- ARIN Public Policy Mailing List
- ARIN Consult
- ARIN Suggest
- ARIN Tech Discuss
- ARIN Issued



Q15. How satisfied are you with your ability to comment and participate using ARIN Mailing lists?

▲ ▼ denotes significantly higher/lower than 2014

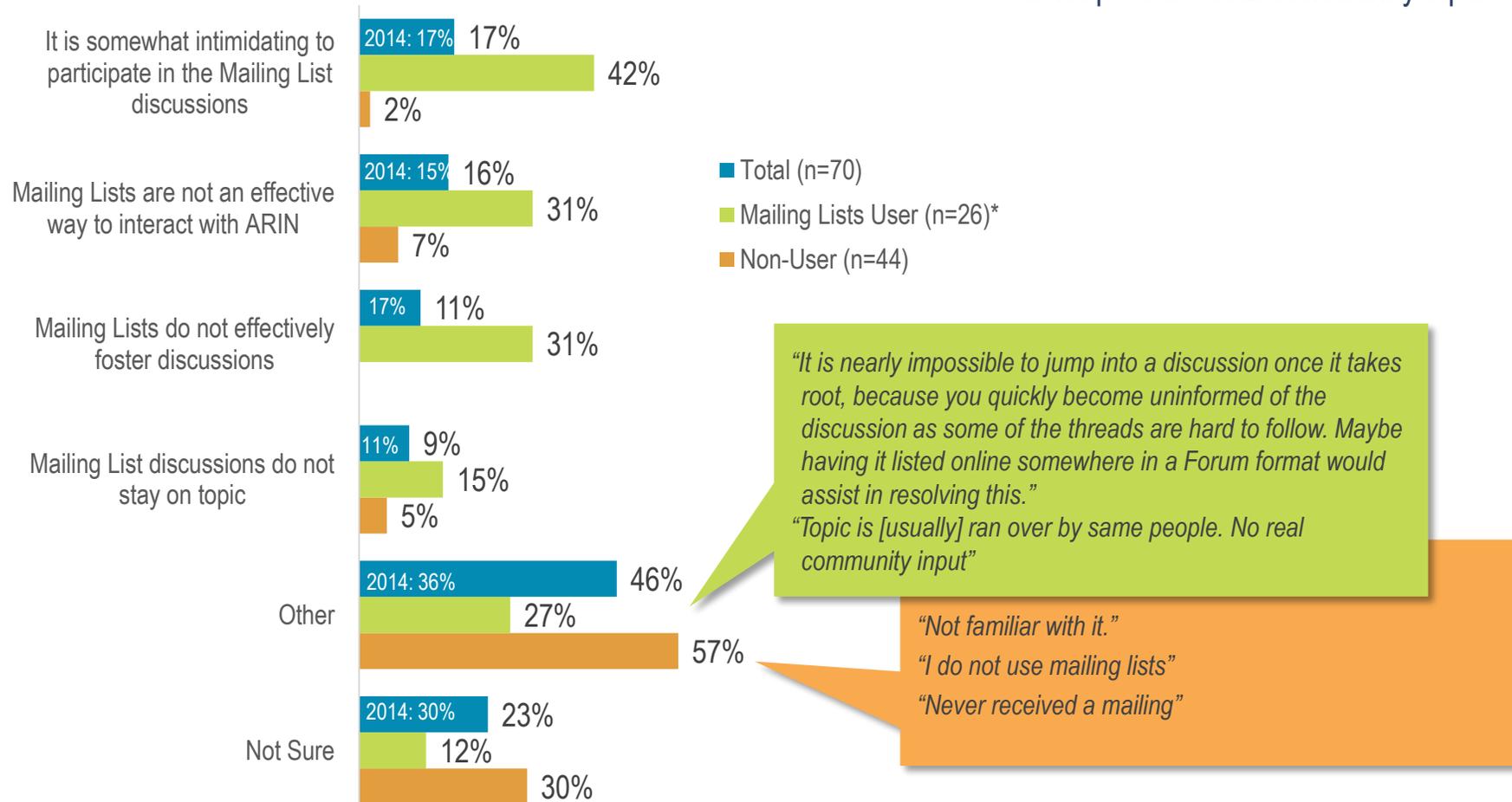
Note: H indicates significantly higher than opposing group

Note: numbers may not sum exactly to 100% due to rounding

# Current unsatisfied mailing list users believe the process is intimidating and ineffective, similar to 2014.

## Reasons for Lower Satisfaction

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



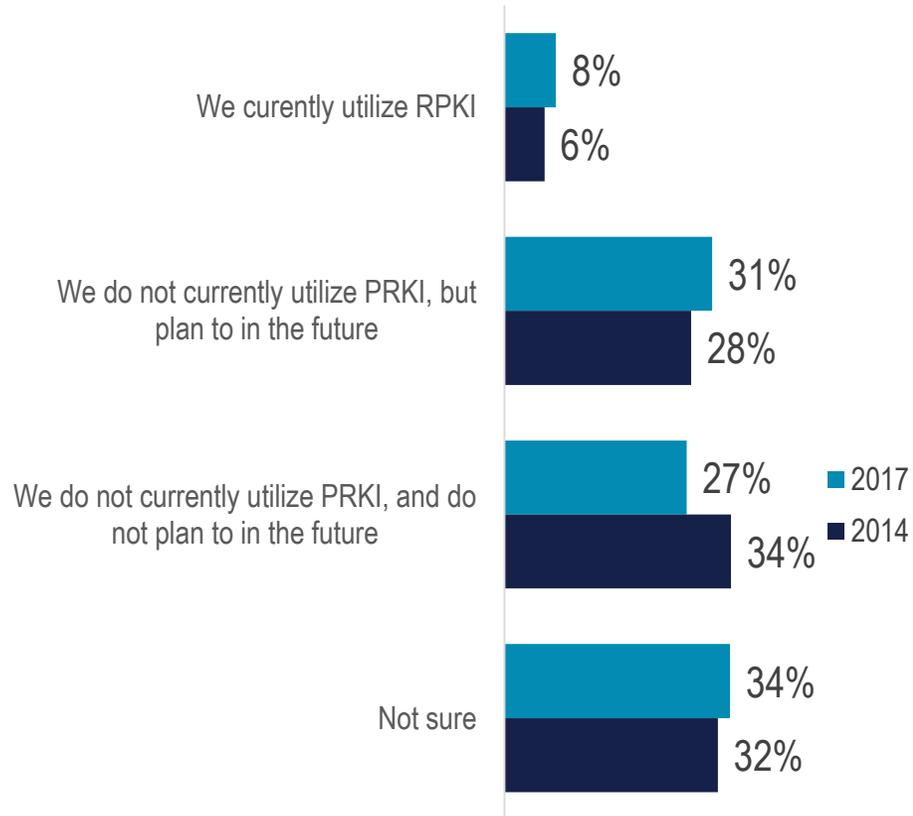
- Non-users of mailing lists have low satisfaction largely due to low awareness of the lists. Users feel that they are hard to keep up with and don't provide "real community input"

Q15a. Why did you rate your satisfaction a [INSERT ANSWER FROM Q15]? Please select all that apply.  
 \* Caution: Small sample size

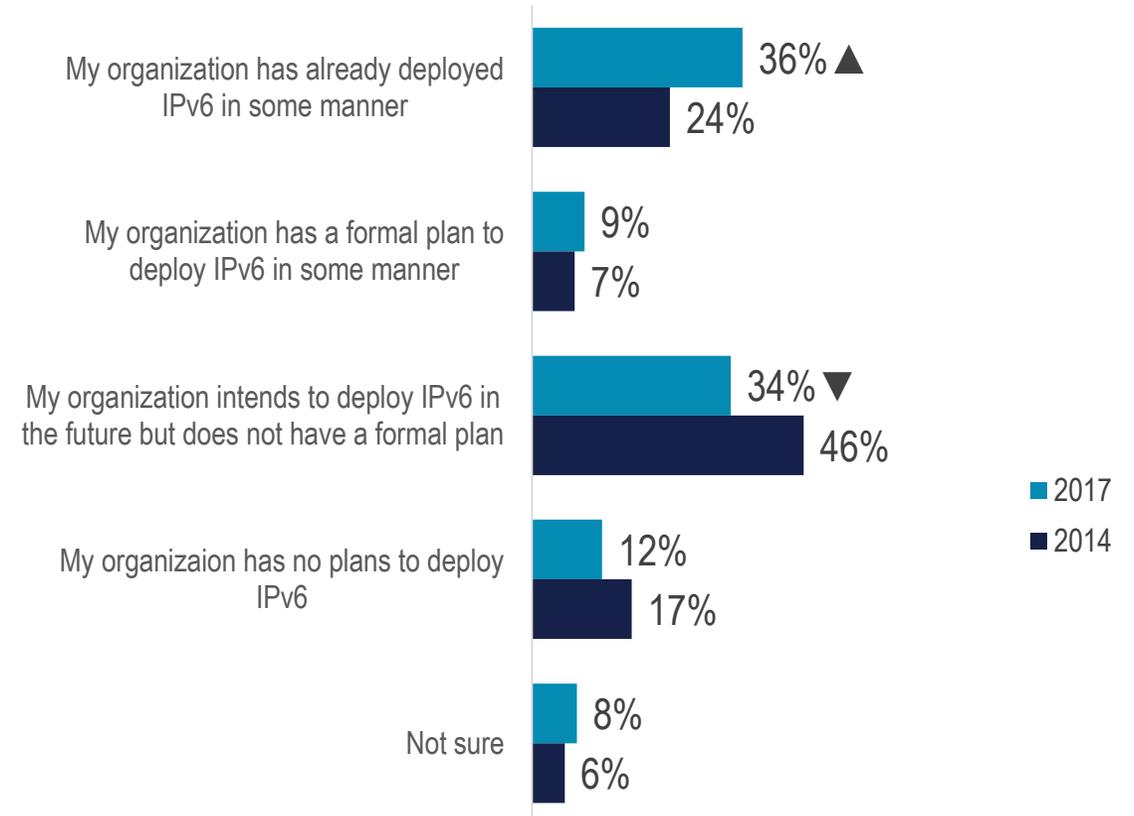
RPKI usage is still not the norm among ARIN community members' organizations. However, organizations have significantly increased IPv6 deployment since 2014.

- ISPs are more likely to utilize RPKI in the future compared to Non-ISPs (43% to 26% of Non-ISPs).

### RPKI Usage (n=247)



### IPv6 Deployment (n=247)



Q17. Does your organization utilize RPKI (Resource Public Key Infrastructure)?

Q18. What is your organization's current plan for IPv6 deployment?

▲ ▼ denotes significantly higher/lower than 2014

Note: numbers may not sum exactly to 100% due to rounding

A background graphic featuring a network of white nodes connected by thin white lines, set against a light blue gradient. The nodes are scattered across the upper half of the image, creating a sense of connectivity and data flow.

# DEMOGRAPHICS & FIRMOGRAPHICS

# Professional Characteristics

- 4 in 10 community members who participated in the survey are network engineers and there is a significant increase in Software Coder/Developers since 2014.
- The average years in the profession is 17.

Years in Profession (n=247)		
	2017	2014
Less than 1 year	1%	0%
2 to 5 years	6%	3%
6 to 10 years	12%	11%
11 to 15 years	15% ▼	22%
16 to 20 years	21%	26%
21 or more years	44%	37%
<i>Average Years in Profession</i>	17	17

Occupation (n=247)		
	2017	2014
Network Engineer	42%	46%
Management	22%	26%
Systems Administrator	16%	17%
Software Coder/Developer	6% ▲	3%
Marketing/Business Development	1%	1%
Attorney/Legal Services	0% ▼	1%
Other	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 2014  
 Note: numbers may not sum exactly to 100% due to rounding

# Company Characteristics

- The community members come from a wide spectrum of organization types with an increase of Hardware/Software vendors compared to 2014.
- Over a third work for organizations with 1,000 or more employees, and most are U.S. based.

Type of Company (n=247)		
	2017	2014
Internet service provider	27%	22%
Hardware/Software vendor	14% ▲	5%
Education	14%	18%
Internet content provider	8%	8%
Government	6%	6%
Network access provider	6%	5%
Mobile network provider	1%	1%
IPv4 transfer facilitator/broker	1%	*not asked
Other	19% ▼	30%
None of the above	4%	5%

Number of Employees (n=247)		
	2017	2014
1	7% ▲	3%
2-24	18%	17%
25-49	6%	6%
50-99	8%	5%
100-499	16%	19%
500-999	10%	9%
1,000 or more	35%	41%
<i>Average # of Employees</i>	660	741

Location of Company (n=247)		
	2017	2014
United States	86%	86%
Canada	9%	11%
Puerto Rico	1%	0%
Other	3%	2%

D2. Which of the following, if any, best describes the type of organization for which you work?

D4. How many employees work for your organization?

D5. In which country is the organization/division you work for based?

▲ ▼ denotes significantly higher/lower than 2014

Note: numbers may not sum exactly to 100% due to rounding