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- ARIN is a nonprofit member-based organization that: supports the operation of the Internet through the management ARIN 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 studies conducted in 2014, 2017 and 2020 and 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 and 2020

Background and Methodology

- This report provides results to a survey of ARIN members and community participants. An online survey was conducted between April 19 and May 15, 2023.

- 317 individuals completed the survey, and have the following relationships with ARIN:
  - 278: Have a direct allocation of IP addresses (IPv4, IPv6) from ARIN, and is a member.
  - 30: Have no direct Internet number resources from ARIN but use some ARIN services.
  - 9: Have no direct Internet number resources from ARIN, and does not use ARIN services, but is part of the ARIN community.

- Having a direct assignment of Internet number resources (IPv4, IPv6, ASN) from ARIN was removed in the 2023 survey. The distribution of ARIN members increased from 2020, while the distribution of non-members remained stable.

- 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. *As shown in the demographics section of the report, the characteristics of the 2020 and 2023 samples are similar in years in profession, occupation, type of company and size of company; this adds confidence that the two sample waves are comparable.*

- 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

- ARIN continues doing a good job of meeting the needs of its community, as the Loyalty Index and satisfaction with meeting needs have trended upward since 2014. Satisfaction with value and commitment to continuing to use ARIN if given a choice have slightly decreased since 2020.

- A full 3 in 4 are highly satisfied with the value they receive from the fees they pay and would still not opt for higher or lower fees (with respectively higher and lower service levels) if given the opportunity.

- Familiarity with ARIN and what it does has remained steady since 2017 with two-thirds at least moderately familiar with ARIN, but only a fifth being very familiar.

- Perceptions of ARIN have also remained steady with a majority believing ARIN adheres to the values of an open Internet and cares about customers and members. However, nearly half are unfamiliar with how well ARIN manages its finances and there is greater uncertainty about whether ARIN is bureaucratic.

- At least 7 in 10 are familiar with all ARIN products and services, while levels of familiarity are similar to 2020 for nearly all services
    - The ARIN website, directory service-related services, and ARIN Online are still the most frequently used products and services, and satisfaction with these items remains high.
    - RPKI usage is up from 2020 (52% vs 38%), as are DNSSEC (48% vs 40%).

- Email and ARIN Online are still the most common ways to receive information and the most preferred, but preference for Email decreased since 2020 (84% vs 92%).

- Participation in the Policy Development Process is up slightly from 2020 (10% vs 7%). The top reason for not participating is a lack of time.

- There is increased interest in RPKI trainings (51% vs 45%) since 2020, and less interest in training for ARIN tools and services (44% vs 51%).

ARIN — American Registry for Internet Numbers

- 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.

- The overall quality gap decreased from 10 points in 2020 to 7 points in 2023. While performance dropped only 1 point, expectations dropped by 5 points, contributing to the smaller gap.**

- Since 2020, ARIN has moved closer to meeting community expectations on all service dimensions except Security, Customer Service and ARIN Meetings.

- Engineering, Registration Services, Customer Service, Communications and Outreach, and Meetings are key opportunities for improvement in 2023.

POINTS FROM EXPECTATIONS

Dimension	2023 (Exp/Perf)	2020 (Exp/Perf)	2017 (Exp/Perf)	2014 (Exp/Perf)	2023	2020	2017	2014
Overall	85% / 79%	90% / 80%	85% / 83%	88% / 76%	**7**	10*	2	12
Internet Governance (Smallest Gaps)	85% / 83%	90% / 83%	80% / 87%	88% / 81%	**2**	7	-7	7
Policy Development (Smallest Gaps)	81% / 78%	84% / 79%	83% / 82%	87% / 74%	**4**	5	1	13
Engineering (Largest Gaps)	86% / 79%	90% / 79%	87% / 85%	89% / 79%	**8**	11	2	10
Registration Services (Largest Gaps)	88% / 79%	90% / 80%	88% / 82%	91% / 77%	**8**	10*	6	14
Customer Service (Largest Gaps)	90% / 81%	90% / 81%	90% / 83%	92% / 79%	**9**	9	7	13
Communications and Outreach (Largest Gaps)	86% / 79%	90% / 79%	87% / 85%	89% / 79%	**9**	9*	4	17
Meetings (Largest Gaps)	77% / 67%	74% / 71%	81% / 77%	77% / 65%	**10**	3	4	12

Legend: 2023, 2020, 2017, 2014
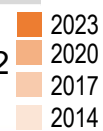
*Note: attributes within dimension changed from 2017 to 2020 and scores are not comparable.
**Gap calculations may differ from numbers in table due to rounding.

2023 Key Opportunities

Performance area	Recommendations for focus	Points from Expectations
Communications and Outreach	• I am able to easily navigate the website to find the content I need • Is a transparent organization • Clearly communicates the organization's future plans • **Offers sufficient opportunities to obtain customer and member feedback** • **Communicates in a way that meets my needs**	10 10 10 **9** ⊙ **8** ⊙
Customer Service	• **Provides clear and accurate information to customers and members** • Provides timely responses to requests • **Has the right people for the job on staff**	**12** ⊙ 10 **8** ⊙
Registration Services	• **Transfer requests are processed in a timely manner** • The process to obtain Internet resources is clear and straightforward	**11** ⊙ 9
Engineering	• Tools and resources (such as WHOIS, WhoWas, DNS, RDAP, IRR, RPKI, etc) are easy to understand • **New technical services and enhancements are delivered in a timely manner**	13 **9** ⊙
Policy Development	• **Has a Policy Development Process which creates useful and fair Internet number resource management policy** • **Policy Development Process allows policies to change quickly enough in response to changes in the industry**	**8** ⊙ **10** ⊙
ARIN Meetings	• Election process is easy to understand and use by eligible voters • The content and activities of meetings are at a level of importance and interest that I want to attend	13 10

Recommendations

- To improve loyalty and narrow performance gaps, ARIN should focus on areas that have large gaps, high importance, or both. At a strategic level, the top areas with the largest gaps include Meetings, Customer Service, Communications and Outreach, Registration Services, and Engineering.

- Meetings: the top areas to focus on are ensuring the election process is easy to understand and the content of meetings are important enough to ensure attendance. ARIN should improve how it provides information on elections and research the different topics members are interested in.

- Customer Service: a few of the attributes in this area are important drivers of loyalty. ARIN should focus on providing clear and accurate information to members (key driver), timeliness of requests and having the right people for the job (key driver where the gap increased). ARIN should consider training and review of materials to ensure clearer communication and examine the training and capabilities of staff in different positions.

- Communication: ARIN should review and get feedback on its website to ensure ease of navigation, examine how it can become more transparent through its communications (including about future plans), and improve mechanisms for getting community feedback (key driver where gap increased).

- ARIN should also investigate ways to expedite transfer requests (key driver). Further, ensuring tools and resources are easy to understand is one of the largest quality gaps warranting attention, while delivering new technical services and enhancements in a timely manner is a key loyalty driver. ARIN should map out some of its processes to determine how to speed up turnaround.

- With increasing usage and interest in RPKI training, ARIN should provide more training opportunities and offer clearer, more helpful documentation, which should help clarify and manage members expectations of the process.

- Focusing on innovation offers an organization a way to change how it views its products, services and processes, while helping it redesign its business models to build stronger affinity and loyalty. ARIN could study leaders in the technology industry for ideas on designing its processes and interfaces.
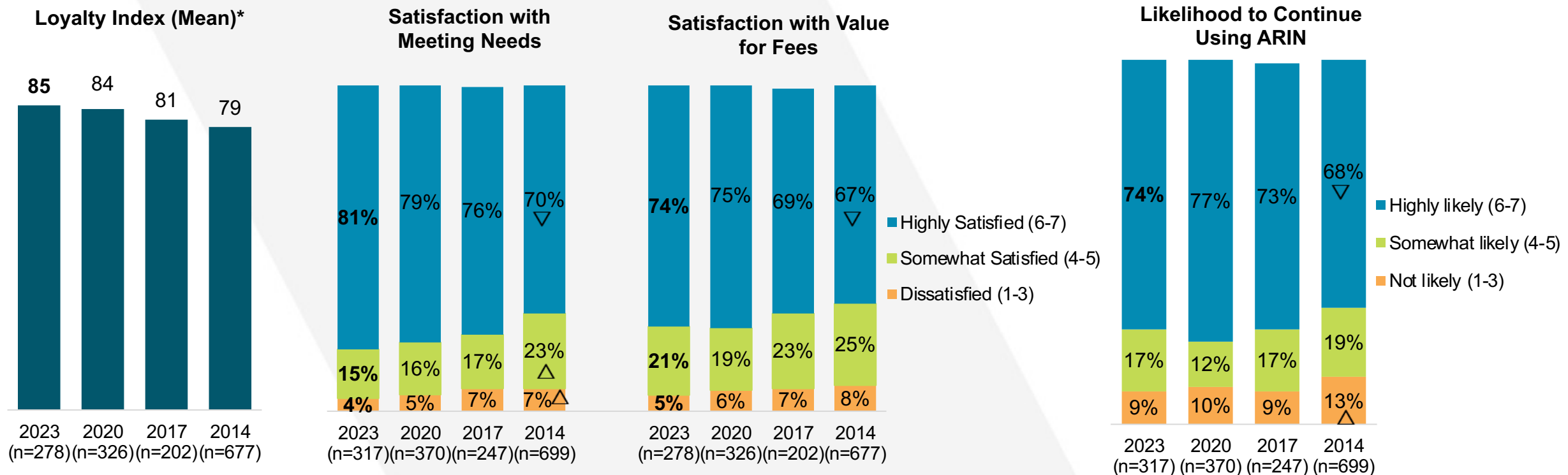
Satisfaction and Loyalty

ARIN continues doing a good job meeting the needs of its community – over 8 in 10 are satisfied that it is meeting the needs of their organization

- The Loyalty Index and satisfaction with meeting needs have trended upward since 2014. Satisfaction with value and commitment to continuing to use ARIN if given a choice decreased slightly since 2020.
- ARIN Members, community members with ISPs, and Network Engineers are more satisfied with ARIN meeting their organization's needs.

Overall Loyalty Metrics

Loyalty Index (Mean)*

85	84	81	79
2023 (n=278)	2020 (n=326)	2017 (n=202)	2014 (n=677)

Satisfaction with Meeting Needs

	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Highly Satisfied	**81%**	79%	76%	70% ▽
Somewhat Satisfied	**15%**	16%	17%	23% △
Dissatisfied	**4%**	5%	7%	7% △

Satisfaction with Value for Fees

	2023 (n=278)	2020 (n=326)	2017 (n=202)	2014 (n=677)
Highly Satisfied	**74%**	75%	69%	67% ▽
Somewhat Satisfied	**21%**	19%	23%	25%
Dissatisfied	**5%**	6%	7%	8%

Likelihood to Continue Using ARIN

	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Highly likely	**74%**	77%	73%	68% ▽
Somewhat likely	17%	12%	17%	19%
Not likely	9%	10%	9%	13% △

- ■ Highly Satisfied (6-7)
- ■ Somewhat Satisfied (4-5)
- ■ Dissatisfied (1-3)

- ■ Highly likely (6-7)
- ■ Somewhat likely (4-5)
- ■ Not likely (1-3)

*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
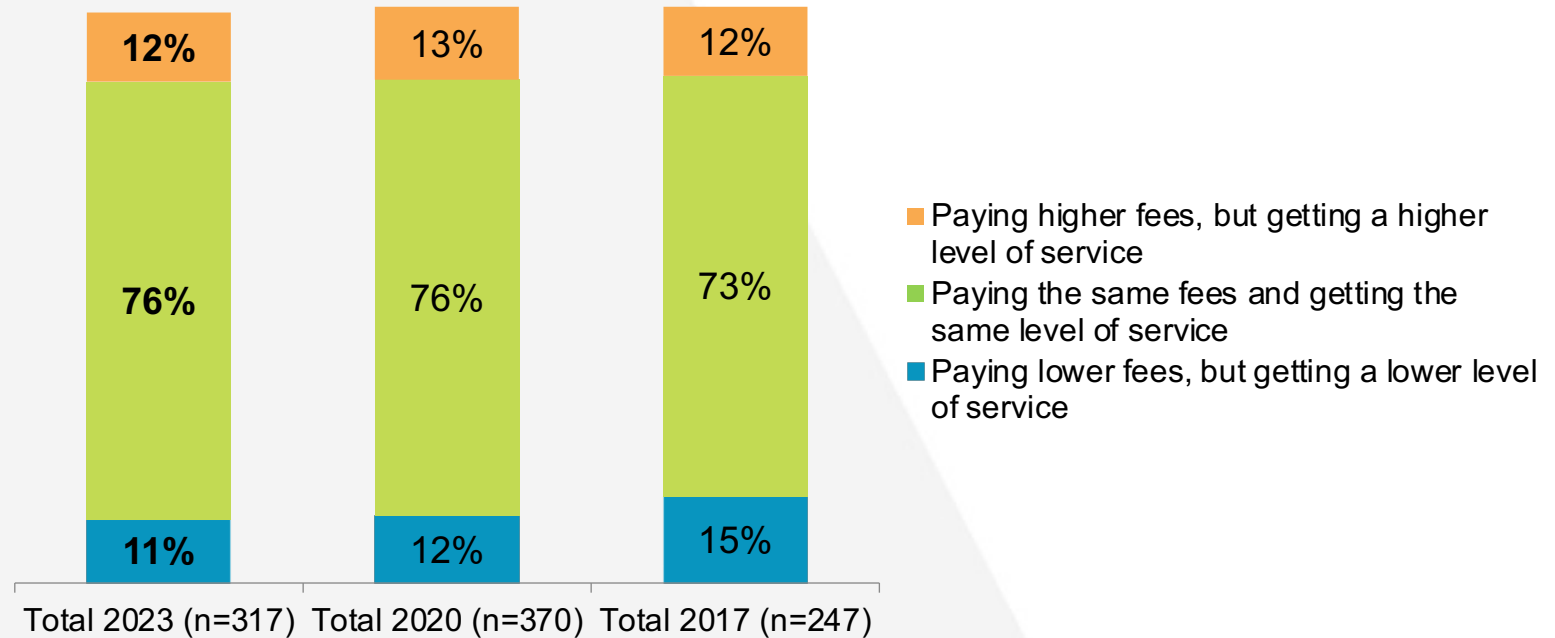
Q1. Thinking about your interactions with ARIN and the products and services it provides, how satisfied are you with ARIN in meeting your organization's needs? | Q2. How satisfied are you with the value you receive from ARIN based on the fees you pay? | Q3. If you had the option to choose another registry services provider, how likely would you be to continue using ARIN services? | ▽△ denotes significantly higher/lower than 2023

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- Community members with less than 100 employees are more likely to prefer lower fees for a lower level of service than community members in larger organizations (17% versus 4%).

ARIN's Fees and Level of Service**

Legend:
- Paying higher fees, but getting a higher level of service
- Paying the same fees and getting the same level of service
- Paying lower fees, but getting a lower level of service

	Total 2023 (n=317)	Total 2020 (n=370)	Total 2017 (n=247)
Paying higher fees	12%	13%	12%
Paying the same fees	76%	76%	73%
Paying lower fees	11%	12%	15%

Q20. Thinking about the fees ARIN charges and the level of service it provides, if you had to choose, would you prefer:
**Note: New question in 2017

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Reasons for High Overall Satisfaction
(6 or 7 on 7-point Satisfaction Scale)

"Very easy to respond to ARIN Support, plus the website has made some major improvements over the last year. We were getting an IPv6 block and moving our legacy stuff to a new agreement, so it was easy."

"Met all our needs in an uncomplicated and timely manner. The only issue was a lack of making it clear in e-mails and on the website how to start the process of signing a legacy agreement. By chance I decided to open a ticket to ask and that appears to be the only way to initiate the process."

"Online interface is easy to use, tickets are acted on promptly and staff are very professional."

"Quick turnaround on requests. No problems with being in touch with ARIN when needed."

"We recently transferred an IP block from a seller to us as buyers. ARIN made the process very easy for us, they also helped through the process to obtain an ASN."

"ARIN staff are top notch professionals. They take the time to address my issues, and personally ensure that everything is in good order."

Reasons for Low Overall Satisfaction
(1 or 2 on 7-point Satisfaction Scale)

"Very difficult to understand what all the legal requirement are. Seems everything is hidden on purpose."

"Despite a huge pressure campaign for legacy resource holders to formally enter into an agreement, ARIN's process for obtaining a LRSA is maddening. ARIN's support desk is incapable of handling requests from government agencies concerning LRSAs."

"High cost following price increase."

"ARIN is blocking legacy resource holders from implementing security policies that benefit the entire Internet community. ARIN should be looking for any possible path to allow the most widespread implementation of security mechanisms that benefit the Internet like RPKI and DNSSEC."
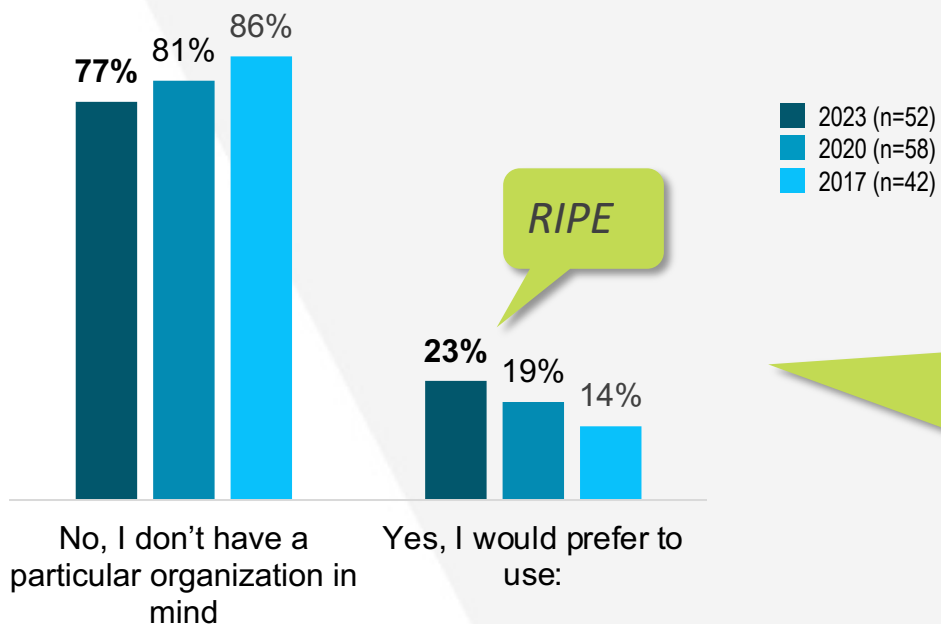
"This is my first time working with ARIN. We have IPs at our current data center from the Data-centers ASN, not our own ASN. As we grew, they suggested contacting ARIN for IPs. Everyone at both data-centers warned me that the experience with ARIN will be very difficult and challenging. I was not let down."

Q1a. Why did you rate your satisfaction a [INSERT RATING FROM Q1]?

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Clearer documentation, more educational resources, 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 Specific Countries

"More educational resources for things like DNS Sec and RPKI. Also, more hosted troubleshooting tools like Looking Glass portals, IRR checks, RPKI/ROA tools, etc."

"Allow IPv6 registration without requiring new contract for previous IPv4 assignments. Some basic training/demos using videos on services offered."

"Would love to receive training on ARIN tools to become more proficient."

"It may benefit some smaller regional orgs to have "ARIN on the Road" visit some cities other than Vancouver and Toronto (common ARIN meeting locations)."

"Be more inviting, warm, friendly, etc. give simpler instructions. Just because I have a technical background doesn't mean I enjoy a working through a mundane technical process with steps that aren't always explained in simple form. In other words, don't write a 2-page instruction on how to draw a square unless it's really needed."

Additional Services ARIN Could Offer to Benefit Companies

"Bulk download of IP/ASN resource assignments, for anti-abuse purposes. (I think we qualify, but the pain of manually applying for access means it's thus far been easier to just spread our WHOIS queries across multiple locations, to evade rate limits.)"

"I would be interested in seeing ARIN examine opportunities to develop formal structured programs - possibly alongside partners like NANOG - to meaningfully contribute to IPv6 adoption. Not just basic education, but hands on labs, and thoughtful programs to reach out to segments of the industry that have a role to play in the transition to IPv6."

"More trainings designed through the observance of key internet trends which may be relevant to Arin's objectives."

"Identification of suballocations within ISPs when tracking down the source of IP addresses/traffic."

"More education and promotion of the routing registry and RPKI service."

D5a. What do you feel ARIN can do to better serve organizations/entities that operate in [INSERT RESPONSE FROM D5]?
D5b. Are there additional services that ARIN could offer that would benefit your company?

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Performance & Expectations

- A scorecard was developed by capturing perceived <u>performance</u> and <u>expectation</u> on 34 specific attributes grouped into 9 dimensions: Policy Development (6 items), Registration Services (4), Engineering (4), Financial Services (2), Communications/Outreach (7), 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) <u>Performance</u>: How well does this describe ARIN? (Scale of 1 to 10)

  2) <u>Expectation</u>: 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.

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.

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- The overall quality gap decreased from 10 points in 2023 to 7 points in 2023. While performance dropped only 1 point, expectations decreased by 5 points, contributing to the smaller gap.

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

POINTS FROM EXPECTATIONS

					2023	2020	2017	2014
Overall	85% / 79%	90% / 80%	85% / 83%	88% / 76%	**7**	**10***	**2**	**12**
Internet Governance	85% / 83%	90% / 83%	80% / 87%	88% / 81%	2	7	-7	7
Policy Development	81% / 78%	84% / 79%	83% / 82%	87% / 74%	4	5	1	13
Financial Services	91% / 86%	90% / 84%	88% / 86%	93% / 83%	5	6	2	10
Security	87% / 81%	87% / 86%	89% / 88%		6	1*	1	
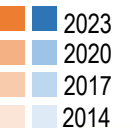
Legend:
- 2023
- 2020
- 2017
- 2014

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

POINTS FROM EXPECTATIONS

					2023	2020	2017	2014
Overall	85% / 79%	90% / 80%	85% / 83%	88% / 76%	7	**10***	**2**	**12**
Registration Services	88% / 79%	90% / 80%	88% / 82%	91% / 77%	8	10*	6	14
Engineering	86% / 79%	90% / 79%	87% / 85%	89% / 79%	8	11	2	10
Communications and Outreach	82% / 74%	84% / 75%	83% / 79%	87% / 70%	9	9*	4	17
Customer Service	90% / 81%	90% / 81%	90% / 83%	92% / 79%	9	9	7	13
Meetings	77% / 67%	74% / 71%	81% / 77%	77% / 65%	10	3	4	12
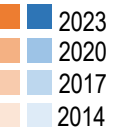
Legend:
- 2023
- 2020
- 2017
- 2014

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. | Dashed lines show expectations | *Note: attributes within dimension changed from 2017 to 2020 and score are not fully comparable.

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ARIN's overall quality gap on Internet Governance decreased since 2020, which is due to a combination of maintained performance and slightly lower expectations

ARIN Internet Governance Performance and Expectations
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

POINTS FROM EXPECTATIONS

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

Legend:
- 2023
- 2020
- 2017
- 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. | Dashed lines show expectations

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• Those highly familiar with ARIN rate its performance on policy development higher than those less familiar, particularly on allowing individuals to participate, facilitating policy development processes, and creating a useful and fair resource.

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

					POINTS FROM EXPECTATIONS			
					2023	2020	2017	2014
Overall ARIN Policy Development	81% / 78%	84% / 79%	83% / 82%	87% / 74%	**4**	**5**	**1**	**13**
Implements policy adhering to the community-developed and Board ratified policies, as they appear in the Number Resource Policy Manual	81% / 85%	89% / 85%	83% / 88%	85% / 81%	-4	4	-5	4
⊙ The Advisory Council is effective in its role facilitating the Policy Development Process	77% / 77%	79% / 78%	76% / 81%	83% / 73%	0	1	-5	10
Policy Development Process allows any interested individual to participate	80% / 78%	80% / 79%	86% / 80%	89% / 71%▽	2	1	6	18

Legend: ■ 2023 ■ 2020 ■ 2017 ■ 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. | Dashed lines show expectations |▽△ Denotes significantly higher/lower than 2023 ⊙ denotes relative high importance

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

POINTS FROM EXPECTATIONS

	2023	2020	2017	2014	2023	2020	2017	2014
Overall ARIN Policy Development	81% / 78%	84% / 79%	83% / 82%	87% / 74%	**4**	**5**	**1**	**13**
The Board is effective in their oversight of the Policy Development Process	85% / 79%	85% / 78%	82% / 82%	90% / 76%	6	7	0	14
(!) Policy Development Process allows policies to change quickly enough in response to changes in the industry	78% / 70%	83% / 73%	83% / 78%	85% / 69%	8	10	5	16
(!) Has a Policy Development Process which creates useful and fair Internet number resource management policy	88% / 78%	87% / 78%	87% / 82%	90% / 75%	10	9	5	15
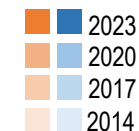
Legend:
- 2023
- 2020
- 2017
- 2014

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. | Dashed lines show expectations | (!) denotes relative high importance

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The quality gap for Financial Services narrowed slightly compared to 2020, with a slight improvement in performance but a slight increase in expectation

ARIN Financial Services Performance and Expectations
% Describes ARIN/an Excellent Organization (Top 3 Box: 8-10)

POINTS FROM EXPECTATIONS

	2023 perf / exp	2020 perf / exp	2017 perf / exp	2014 perf / exp	2023	2020	2017	2014
Overall ARIN Financial Services	91% / 86%	90% / 84%	88% / 86%	93% / 83%	**5**	**6**	**2**	**10**
Provides timely and appropriate responses for billing and administration inquiries	90% / 86%	89% / 83%	91% / 86%	93% / 84%	3	5	5	9
Invoicing and payment processing procedures are explained clearly	92% / 85%	92% / 86%	86% / 86%	93% / 81%	7	6	0	12

2023
2020
2017
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. | Dashed lines show expectations

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Registration Services remains an opportunity due to its gap, though the gap narrowed slightly since 2020 and is better than the baseline

- The largest quality gap is now in processing transfer requests in a timely manner, an important loyalty driver where expectations have increased

ARIN Registration Services Performance and Expectations

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

	2023	2020	2017	2014	POINTS FROM EXPECTATIONS 2023	2020	2017	2014
Overall ARIN Registration Services*	88% / 79%	90% / 80%	88% / 82%	91% / 77%	**8**	**10***	**6***	**14***
⚠ Resource requests are processed in a timely manner	86% / 80%	92% / 80%	83% / 84%	95%△ / 80%	6	12	-1	15
The Registration Services Department adheres to policies published in the Number Resource Policy Manual	93% / 86%	92% / 86%	91% / 88%	92% / 90%	7	6	3	2
The process to obtain Internet number resources is clear and straightforward	83% / 73%	91% / 74%	83% / 75%	89% / 65%▽	9	17	8	24
⚠ Transfer requests are processed in a timely manner	89% / 78%	86% / 79%	91% / 80%	92% / 75%	11	7	11	17

Legend: ■ 2023 ■ 2020 ■ 2017 ■ 2014
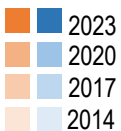
*Note: "The transfer listing service operates at a high level of quality, usability, and reliability" was removed in 2020 and therefore the overall score for Registration Services for 2020 is not comparable to previous years.

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 significantly higher/lower than 2023 ⚠ denotes relative high importance

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The overall quality gap for Engineering decreased from 2020 due to a lowered expectations, but performance across dimensions was unchanged

ARIN
American Registry for Internet Numbers

- Easily understandable tools and resources remains the biggest opportunity area, while the gaps on providing relevant and useful tools/resources and timely delivery had smaller gaps compared to 2020 but still warrant attention due to their importance

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

	2023	2020	2020	2017	2014
		POINTS FROM EXPECTATIONS			
		2023	2020	2017	2014
Overall ARIN Engineering — 86%/79%, 90%/79%, 87%/85%, 89%/79%		**8**	**11**	**2**	**10**
Technical services operate at a high level of quality and reliability — 91%/90%, 94%/86%, 90%/92%, 92%/85%		1	8	-2	7
(!) Provides tools and user resources that are relevant and useful to me — 83%/77%, 90%/78%, 88%/86%△, 88%/78%		6	11	2	10
(!) New technical services and enhancements are delivered in a timely manner — 81%/72%, 86%/73%, 82%/81%△, 85%/70%		9	12	1	15
Tools and resources (such as WHOIS, WhoWas, DNS, RDAP, IRR, RPKI, etc) are easy to understand — 90%/77%, 90%/77%, 89%/80%, 92%/82%		13	13	9	10
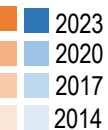
■ 2023
■ 2020
■ 2017
■ 2014

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. | Dashed lines show expectations | ▽△ Denotes significantly higher/lower than 2023
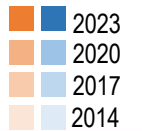
25

- ARIN should also focus on offering opportunities for obtaining feedback

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

POINTS FROM EXPECTATIONS

	2023	2020	2017	2014	2023	2020	2017	2014
Overall ARIN Communications and Outreach*	82% / 74%	84% / 75%	83% / 79%	87% / 70%	**9**	**9***	**4***	**17***
Clearly communicates the organization's activities (meetings, elections, etc.)	82% / 76%	87% / 77%	87% / 82%	79% / 70%	6	10	5	9
Provides training and materials that are useful to me	70% / 63%	77% / 66%			8	12	Not asked	Not asked
(!) Communicates in a way that meets my needs	86% / 78%	91% / 79%	88% / 81%	90% / 74%	8	12	7	16
(!) Offers sufficient opportunities to obtain customer and member feedback	86% / 76%	83% / 81%	75% / 78%	87% / 71%	9	2	-3	16
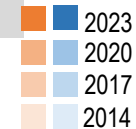
Legend: 2023, 2020, 2017, 2014

*Note: "Provides training and materials that are useful to me" was added in 2020 and therefore the overall score for Communications and Outreach for 2020 is not comparable to previous years.

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

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

POINTS FROM EXPECTATIONS

	2023	2020	2017	2014
Overall ARIN Communications and Outreach* 82% / 74% — 84% / 75% — 83% / 79% — 87% / 70%	9	9*	4*	17*
Clearly communicates the organization's future plans 79% / 70% — 76% / 67% — 79% / 74% — 85% / 68%	10	8	5	17
Is a transparent organization 90% / 79% — 91% / 78% — 84% / 83% — 90% / 71%▽	10	13	1	19
I am able to easily navigate the website to find the content I need 84% / 73% — 86% / 77% — 86% / 74% — 90% / 68%	10	9	12	22
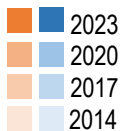
Legend: 2023, 2020, 2017, 2014

*Note: "Provides training and materials that are useful to me" was added in 2020 and therefore the overall score for Communications and Outreach for 2020 is not comparable to previous years. |

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 significantly higher/lower than 2023 ⓘ denotes relative high importance

ARIN Customer Service performance and the overall quality gap remain the same as 2020, with the biggest gap being in providing clear and accurate information

ARIN
American Registry for Internet Numbers

ARIN Customer Service Performance and Expectations

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

POINTS FROM EXPECTATIONS

	2023	2020	2017	2014
Overall ARIN Customer Service — 90%/81%, 90%/81%, 90%/83%, 92%/79%	9	9	7	13
(!) Staff interacts effectively with customers and members — 88%/81%, 88%/81%, 90%/84%, 89%/79%	7	7	6	10
(!) Staff works with customers to resolve complex issues — 88%/81%, 88%/80%, 90%/85%, 94%/77%	7	9	5	17
(!) Has the right people for the job on staff — 91%/83%, 89%/86%, 88%/84%, 91%/81%	8	3	4	10
Provides timely responses to requests — 94%/84%, 94%/79%, 97%/81%, 95%/81%	9	15	16	14
(!) Provides clear and accurate information to customers and members — 90%/78%, 90%/80%, 86%/83%, 92%/76%	12	10	3	16
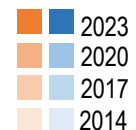
Legend:
- 2023
- 2020
- 2017
- 2014

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. | Dashed lines show expectations | (!) denotes relative high importance

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ARIN
American Registry for Internet Numbers

- Members rate ARIN's performance on meeting content higher than other community members (61% vs 42%). Further, those who are highly familiar with ARIN rate the meeting content higher (65% vs 44% who are less familiar).
- ISPs rate ARIN higher on election process features than non-ISPs (88% vs. 65%)

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

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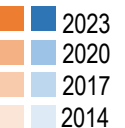
■ 2023
■ 2020
■ 2017
■ 2014

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. | Dashed lines show expectations | ▽△ Denotes significantly higher/lower than 2023

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- 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 is equally strong in staff interactions with members and providing useful tools and resources, while major opportunity areas include communications (i.e., meeting needs, transparency) and customer service (i.e., timely responses, providing clear information).

IMPACT ON MEAN LOYALTY

STRENGTH

SECONDARY STRENGTH

OPPORTUNITY

SECONDARY OPPORTUNITY

Staff interacts effectively with customers and members

Provides tools and user resources that are relevant and useful

Communicates in a way that meets my needs

New technical services delivered quickly

The process to obtain Internet number resources is clear

Staff works with customers to resolve complex issues

Policy Development Process allows policies to change quickly enough

Is a transparent organization

Provides clear and accurate information customers and members

Advisory Council effectively facilitates Policy Process

Has the right people for the job on staff

Policy Development Process which creates useful and fair Internet number resource management policy

Implements policy adhering to the community-developed and Board ratified policies

Resource requests are processed in a timely manner

Provides timely responses to requests

Invoicing and payment processing procedures are explained clearly

Offers sufficient opportunities to obtain customer and member feedback

Technical services operate at a high level of quality and reliability

The Board is effective in oversight of Policy Development Process

Transfer requests are processed in a timely manner

I am able to easily navigate the website to find content I need

Policy Development Process allows any interested individual to participate

Services meet the security needs of my organization

The content and activities of meetings are important and interesting

Provides timely and appropriate responses for billing and administration

The Registration Services Department adheres to policies

Communicates the organization's future plans

Supports efforts to keep Internet number registries self-governed

Provides training and materials that are useful to me

Takes an active role in Internet governance

Tools and resources are easy to understand

Election process for the Board and Advisory Council is clear

Election process is easy to understand and use

Clearly communicates the organization's activities

Legend:
- Policy Development
- Registration Services
- Engineering
- Financial Services
- Communications/Outreach
- ARIN Meetings
- Customer Service
- Internet Governance
- Security

PERFORMANCE GAP (EXPECTATIONS MINUS PERFORMANCE)

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

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Providing relevant tools, policy adaptation, resolving issues, and timely resource requests shifted from opportunities in 2020 to strengths, while former strengths (having the right people for the job and obtaining member feedback) have become opportunities

Quadrant Change Summary

STRENGTH	OPPORTUNITY
○ Staff interacts effectively with customers and members	○ Communicates in a way that meets my needs
● Provides tools and user resources that are relevant and useful to me	● New technical services and enhancements are delivered in a timely manner
● Implements policy adhering to the community-developed and Board ratified policies, as they appear in the Number Resource Policy Manual	○ The process to obtain Internet number resources is clear and straightforward
● Staff works with customers to resolve complex issues	○ Is a transparent organization
● Policy Development Process allows policies to change quickly in response to industry changes	○ Provides clear and accurate information to customers and members
● Resource requests are processed in a timely manner	○ Policy Development Process creates useful/fair Internet number resource management policy
● The Advisory Council is effective in its role facilitating the Policy Development Process	○ Provides timely responses to requests

SECONDARY STRENGTH	SECONDARY OPPORTUNITY
● Takes an active role in Internet governance	● Offers sufficient opportunities to obtain customer and member feedback
○ Technical services operate at a high level of quality and reliability	● Has the right people for the job on staff
○ Policy Development Process allows any interested individual to participate	● Transfer requests are processed in a timely manner
○ Provides timely and appropriate responses for billing and administration inquiries	○ I am able to easily navigate the website to find the content I need
● Supports efforts to keep Internet number registries self-governed, as defined by the needs of their respective communities	● The content and activities of meetings are at a level of importance and interest that I want to attend
○ Election process for the Board and Advisory Council is clear and transparent	○ Clearly communicates the organization's future plans
● Clearly communicates the organization's activities	● Election process is easy to understand and use by eligible voters
○ The Registration Services Department adheres to policies published in the Number Resource Policy Manual	○ Tools and resources (such as WHOIS, WhoWas, DNS, RDAP, IRR, RPKI, etc) are easy to understand
○ Services meet the security needs of my organization (new in 2020)	
○ Invoicing and payment processing procedures are explained clearly	
● Provides training and materials that are useful to me (new in 2020)	
○ The Board is effective in their oversight of the Policy Development Process	

● Colored circle indicates quadrant in 2020; ○ Unfilled circle indicates no change in quadrant

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Perceptions & Positioning

A majority of community members continue to believe ARIN adheres to the values of an open Internet and cares about customers and members

- Perceptions of how ARIN uses its financial resources have improved since 2020 but uncertainty remains high.
- Those more familiar with ARIN continue to have more positive perceptions about its image.
- Although uncertainty about ARIN as bureaucratic has increased since 2017, those from ISPs and organizations with less than 100 employees are more likely to view ARIN as bureaucratic.

Descriptions of ARIN

2023 Total (n=317)
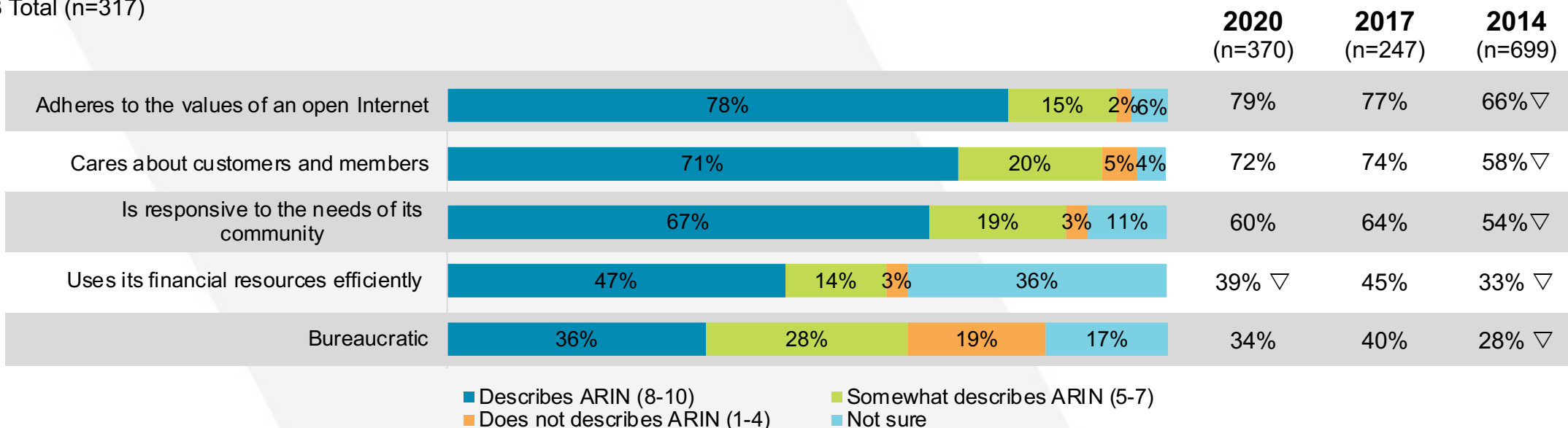
Describes ARIN (8-10)

	Describes ARIN (8-10)	Somewhat describes ARIN (5-7)	Does not describes ARIN (1-4)	Not sure	2020 (n=370)	2017 (n=247)	2014 (n=699)
Adheres to the values of an open Internet	78%	15%	2%	6%	79%	77%	66% ▽
Cares about customers and members	71%	20%	5%	4%	72%	74%	58% ▽
Is responsive to the needs of its community	67%	19%	3%	11%	60%	64%	54% ▽
Uses its financial resources efficiently	47%	14%	3%	36%	39% ▽	45%	33% ▽
Bureaucratic	36%	28%	19%	17%	34%	40%	28% ▽

■ Describes ARIN (8-10) ■ Somewhat describes ARIN (5-7)
■ Does not describes ARIN (1-4) ■ Not sure

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 2023

34

- Community members are less familiar with ARIN's efforts in using its resources efficiently.

ARIN Image
2023 Total (n=317)

	Priority Index*	Importance^	% Describes Well (8-10)
Uses its financial resources efficiently	1.3	24%	47%
Is responsive to the needs of its community	1.0	26%	67%
Cares about customers and members	0.7	25%	71%
Adheres to the values of an open Internet	0.4	20%	78%
Bureaucratic**	0.3	5%	36%

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. |

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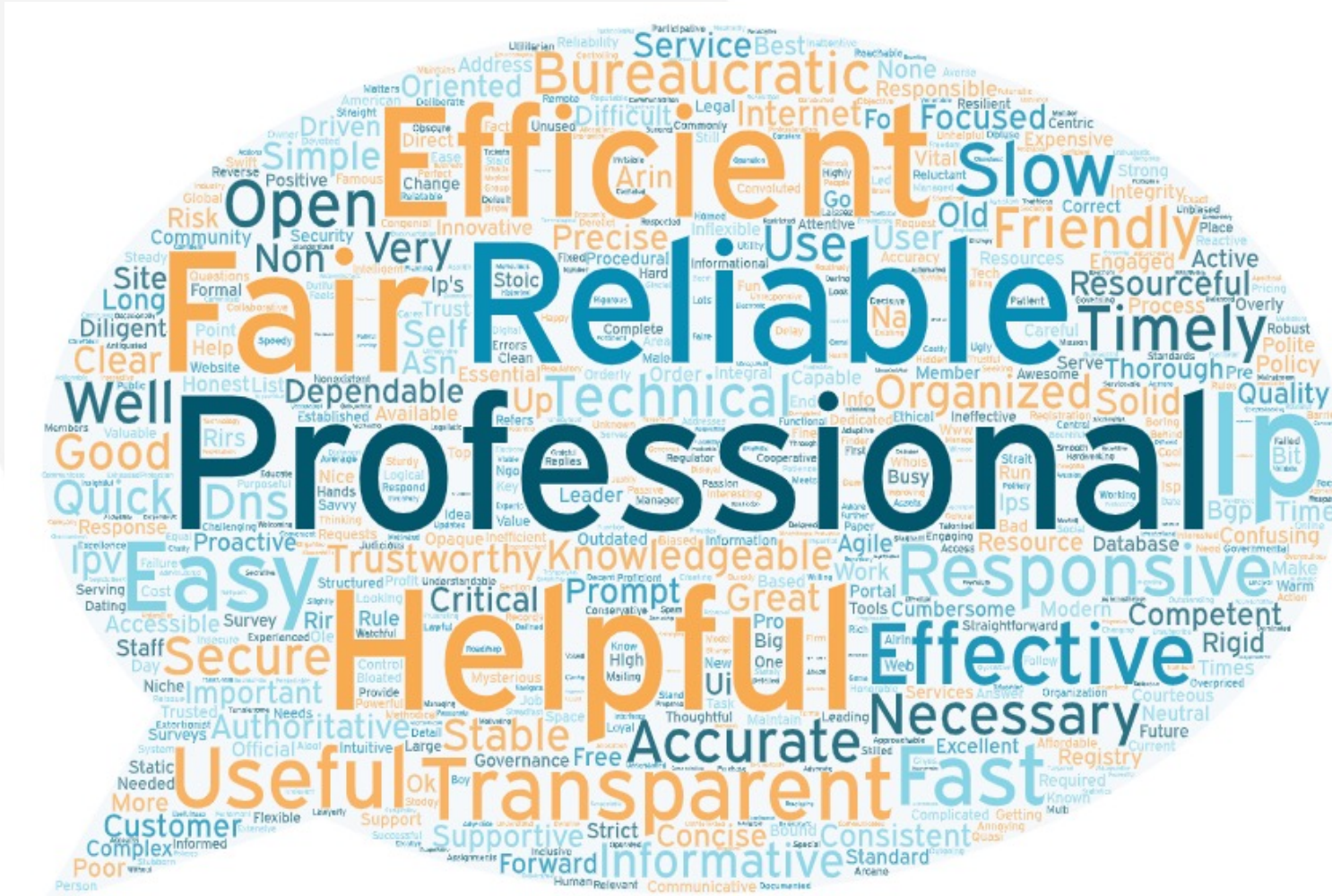
Q11a. We are interested in your perceptions of ARIN. What are three adjectives you would use to describe ARIN?
Note: numbers may not sum exactly to 100% due to rounding

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Familiarity & Usage of ARIN Products & Services

- Familiarity is higher among ARIN members and community members from ISPs.

Familiarity with ARIN

	2023 Total n=(317)	2020 Total (n=370)	2017 Total (n=247)	2014 Total (n=699)	ISPs (n=87)	Non-ISPs (n=230)
Very familiar	21%	17%	19%	11%▽	30% H	18%
Moderately familiar	46%	49%	43%	43%	49%	45%
Slightly familiar	28%	30%	33%	40%△	21%	31%H
Not at all familiar	4%	5%	5%	5%		6%

Legend:
- ■ Very familiar
- ■ Moderately familiar
- ■ Slightly familiar
- ■ Not at all familiar

Q6. How familiar are you with ARIN and its activities?
▽△ Denotes significantly higher/lower than 2023 | Note: numbers may not sum exactly to 100% due to rounding | Note: H indicates significantly higher than opposing group

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A significant portion of community members are familiar with all ARIN products and services

- Levels of familiarity are similar to 2020 for all services.

Familiarity with ARIN Products and Services
Total
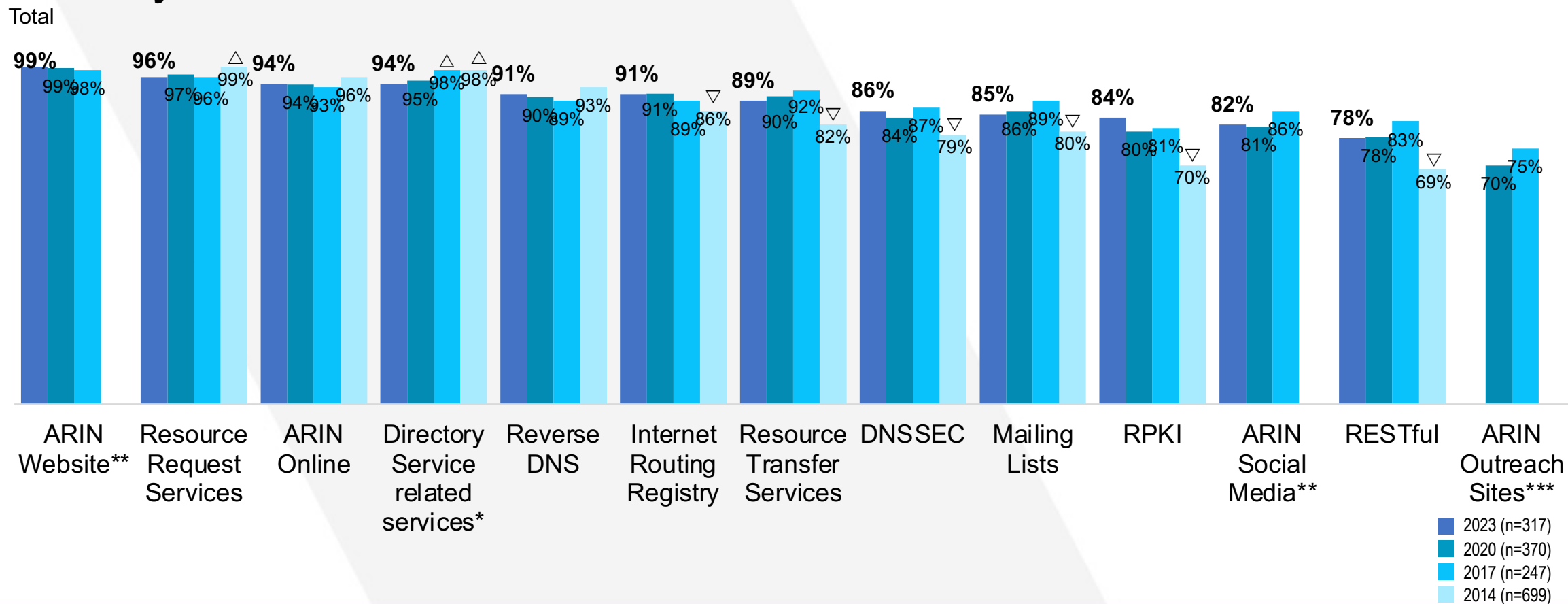
	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
ARIN Website**	99%	99%	98%	
Resource Request Services	96%	97%	96%	99% △
ARIN Online	94%	94%	93%	96%
Directory Service related services*	94%	95%	98% △	98% △
Reverse DNS	91%	90%	89%	93%
Internet Routing Registry	91%	91%	89%	86% ▽
Resource Transfer Services	89%	90%	92%	82% ▽
DNSSEC	86%	84%	87%	79% ▽
Mailing Lists	85%	86%	89%	80% ▽
RPKI	84%	80%	81%	70% ▽
ARIN Social Media**	82%	81%	86%	
RESTful	78%	78%	83%	69% ▽
ARIN Outreach Sites***		70%	75%	

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 2023 | *Note: Slight word change from 2017 | **Note: New question/addition in 2017 | ***Note: Attribute removed in 2023

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The ARIN website, directory service-related services, and ARIN online are still the most frequently used products and services, while usage of the Internet Routing Registry, RPKI, and DNSSEC increased from 2020

Use of ARIN Products and Services**
2023 Total (n=317)

Percent Used

	Use Monthly or More	Use Less than Monthly	Never Use	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
ARIN Website	51%	46%	2%	97%	96%	94%	*Not asked*
Directory Service related services*	50%	34%	10%	84%	86%	91%△	91%△
ARIN Online	40%	49%	5%	89%	86%	83%	88%
Mailing Lists	31%	28%	26%	59%	57%	58%	34%▽
Internet Routing Registry	27%	52%	12%	79%	72%▽	69%▽	55%▽
Reverse DNS	26%	47%	18%	73%	69%	68%	67%▽
RPKI	18%	34%	32%	52%	38%▽	30%▽	18%▽
DNSSEC	17%	31%	38%	48%	40%▽	41%	25%▽
RESTful	15%	27%	36%	42%	37%	44%	27%▽
ARIN Social Media	14%	21%	47%	35%	32%	38%	*Not asked*
Resource Request Services	11%	75%	10%	86%	83%	87%	92%△
Resource Transfer Services	4%	44%	41%	48%	52%	55%	30%▽

■ Use Monthly or More   ■ Use Less than Monthly   ■ Never Use

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 2023 | *Note: word change in 2020 | Note: % not familiar not shown | Note: numbers may not sum exactly due to rounding | ***Note: Attribute ARIN Outreach Sites removed in 2023

Satisfaction remains high with ARIN's most frequently used products and services with a significant increase for RPKI and upward movement for the Internet Routing Registry and Resource Service Requests

Satisfaction with ARIN Products and Services - % Highly Satisfied (6-7)
Among those who have used product or service

Legend:
- 2023 (n=109-307)
- 2020 (n=94-354)
- 2017 (n=74-232)
- 2014 (n=122-641)

Internet Routing Registry: 81%, 76%, 70%, 71%
Resource Request Services: 79%, 77%, 71%, 76%
RPKI: 79%, 68%, 61%, 64%
Directory Service related services*: 79%, 79%, 78%, 82%
ARIN Online: 79%, 81%, 80%, 74%
ARIN Website**: 79%, 80%, 79%
Reverse DNS: 78%, 81%, 77%, 78%
Mailing Lists: 72%, 73%, 71%, 65%
Resource Transfer Services: 70%, 70%, 66%, 64%
RESTful: 69%, 76%, 65%, 67%
DNSSEC: 69%, 75%, 63%, 71%
ARIN Social Media**: 67%, 77%, 70%
ARIN Outreach Sites***: 68%, 68%

Q8. How satisfied are you with each of the following products and services offered by ARIN?
▽△ Denotes significantly higher/lower than 2023 | *Note: Slight word change from 2017 | **Note: New question/addition in 2017 | ***Note: Attribute removed in 2023

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- Since 2017, the overall incidence of contact with ARIN has decreased.
- Not surprisingly, attendance at in-person meetings or events has increased since 2020.

Contact with ARIN in the Past 12 Months
Total

2017: 77%

2017: 79%

2017: 70%

Category	2023	2020	2017	2014
Contacted ARIN through ARIN Online	61%	62%	70% △	44% ▽
Contacted ARIN through email**	44%	49%	47%	
Taken an ARIN survey about a registration transaction	23%	21%	27%	14% ▽
Voted in an election	23%	14% ▽	19%	12% ▽
Contacted ARIN by telephone	18%	24% △	28% △	20%
Attended an in-person meeting or event**	10%	6% ▽	15%	
Interacted with ARIN via social media	9%	7%	11%	2% ▽
Posted to an ARIN mailing list	8%	8%	13%	6%
None of the above	16%	17%	11%	18%
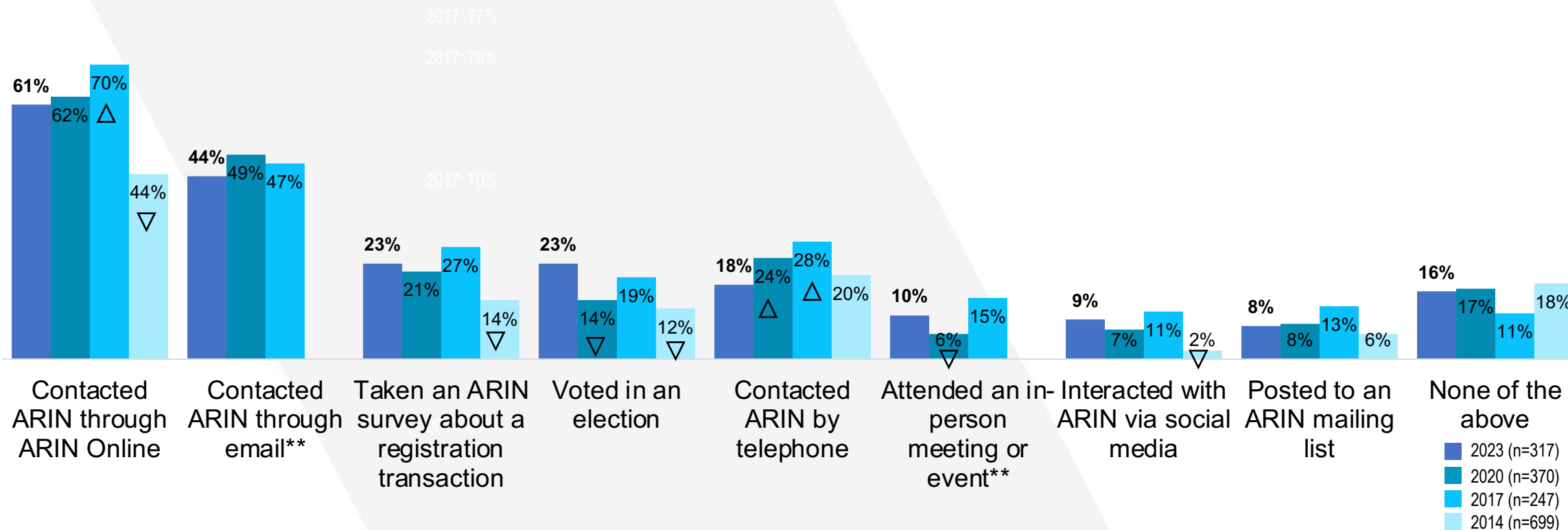
Legend:
- 2023 (n=317)
- 2020 (n=370)
- 2017 (n=247)
- 2014 (n=699)

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 2023 | **Note: New question/addition in 2017

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Email and ARIN Online are still the most common ways to receive information and the most preferred, although preference for email dropped since 2020

Current Method of Receiving Information/Updates from ARIN**
Total

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

Preferred Method of Receiving Information/Updates from ARIN
Total

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

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
▽△ Denotes significantly higher/lower than 2023 | **Note: New question/addition in 2017 | *Note: New question/addition in 2023

43

Participation in the Policy Development process experienced a slight increase since 2020, the top reasons for not participating being a lack of time and knowledge on how to participate

- Community members with 21 or more years in their profession are more likely to be happy with ARIN policy not see a need to get involved.

Participation in the ARIN Policy Development Process in the Past 12 Months

Total

	Yes	No
2023 (n=317)	10%	90%
2020 (n=370)	7%	93%
2017 (n=247)	14%	86%
2014 (n=699)	5%	△95% ▽

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

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

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 2023 | *Caution; small sample size | *Note: Reasons less than 10% not shown | **Note: New question/addition in 2017 | ***Note: New question/addition in 2023

44

Familiarity with the ARIN Fellowship program remains low with about two-thirds having never heard of the program

- Members, those highly familiar with ARIN, ISPs, and Network Engineers are more likely to be familiar with the ARIN Fellowship program.

Familiarity with the ARIN Fellowship Program**

Total

	Never heard of this program	Familiar with the program, but never applied to be a fellow	I have applied to be a fellow, but have never been selected	I am a past fellow
Total 2023 (n=317)	65%	28%	3%	3%
Total 2020 (n=370)	72%	25%	2%	2%
Total 2017 (n=247)	66%	29%	2%	3%

Q14_c. How familiar are you with the ARIN Fellowship Program, in which ARIN selects and covers the cost for 15 individuals to attend and actively participate in each ARIN Public Policy and Members Meeting?
**Note: New question/addition in 2017

45

ARIN
American Registry for Internet Numbers

- There was a significant decline in Interest in how to use ARIN tools and services from 2020.

Training Interest
Total

	RPKI	IPv6 deployment	Use of ARIN tools and services	IPv4 transfers	Use of ARIN Online	ARIN should not provide formal training services	Other	Not sure
2023	51%	45%	44%	35%	23%	2%	3%	17%
2020	45%	43%	51%	32%	24%	2%	6%	15%
2017	36%	53%	70% / 40%	29%	23%	4%	3%	17%
2014	28%	52%	40%	23%	18%	5%	3%	22%

Legend:
- 2023 (n=317)
- 2020 (n=370)
- 2017 (n=247)
- 2014 (n=542)
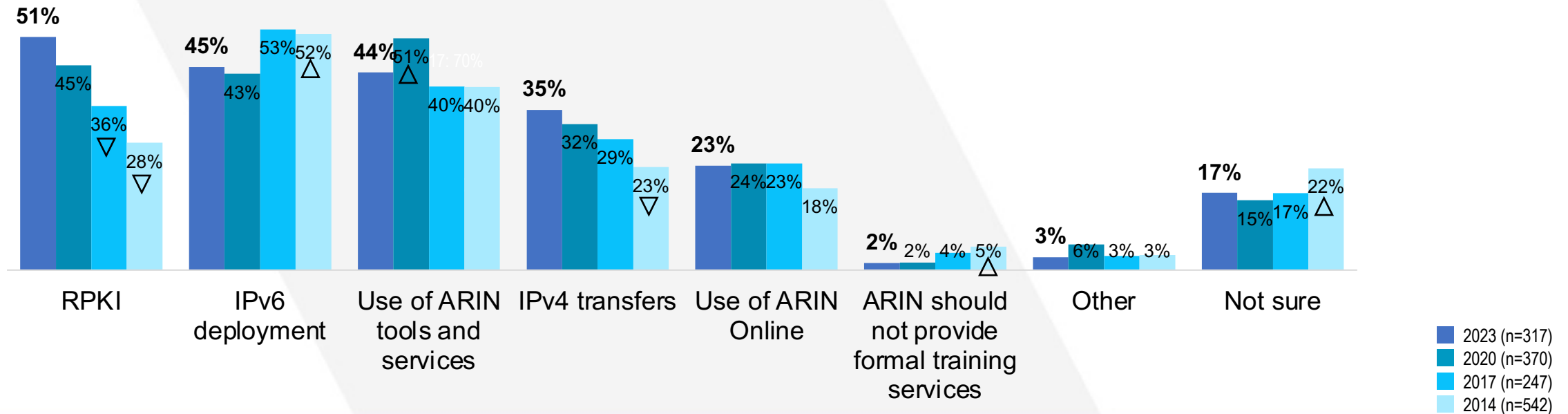
Q16. For which of the following topics would you be interested in formal training provided by ARIN? Please select all that apply.
▽△ Denotes significantly higher/lower than 2023

46

- ISP members are more likely than Non-ISP members to be very familiar with the POC validation process (60% vs 37%) and believe it is critical (57% vs 44%).

Familiarity with ARIN's Annual POC Validation Process**

Total

	Not at all familiar	Slightly familiar	Moderately familiar	Very familiar
2023 (n=317)	12%	21%	23%	44%
2020 (n=370)	22% △	21%	24%	34% ▽
2017 (n=247)	23% △	18%	26%	33% ▽

■ Not at all familiar ■ Slightly familiar ■ Moderately familiar ■ Very familiar

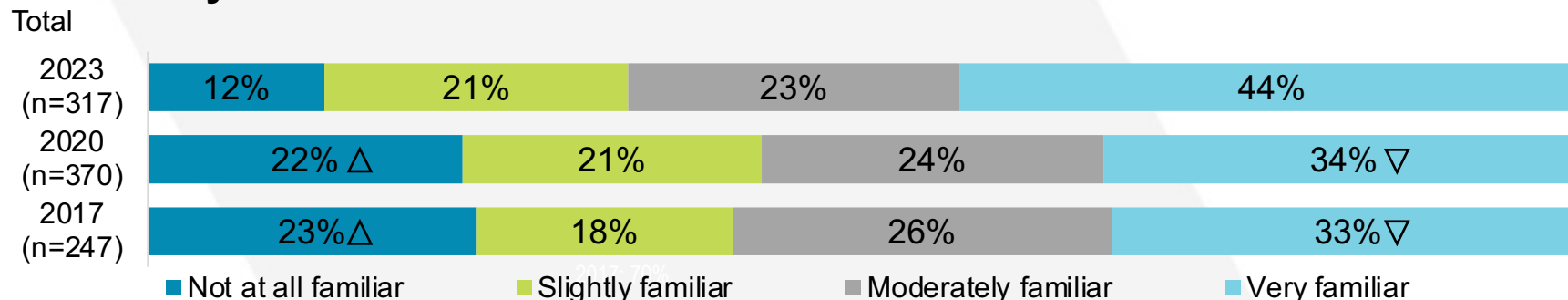## Importance of ARIN's Annual POC Validation Process**

Total

	Undesirable	Neither Desirable or Undesirable	Desirable (but not critical)	Critical
2023 (n=317)	2%	7%	44%	48%
2020 (n=370)	1%	9%	38%	52%
2017 (n=247)	1%	14% △	36%	49%

■ Undesirable ■ Neither Desirable or Undesirable ■ Desirable (but not critical) ■ Critical

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 2023 | *Note: New question/addition in 2017

47

Satisfaction with ARIN's mailing list has remained stable since 2017 with over half of community members and more than two thirds of users being highly satisfied
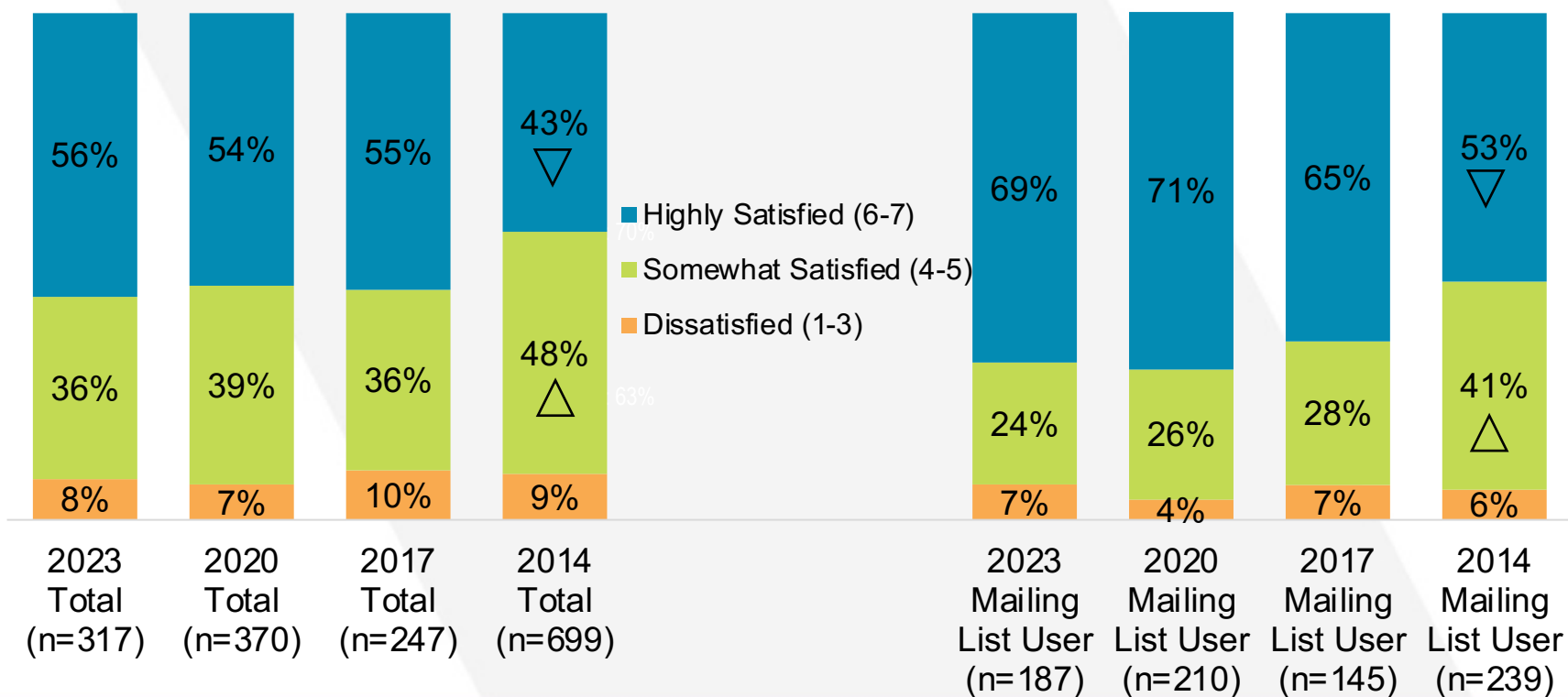
- Satisfaction among users has remained stable since 2014.

Mailing List Satisfaction

Highly Satisfied (6-7)
Somewhat Satisfied (4-5)
Dissatisfied (1-3)

	2023 Total (n=317)	2020 Total (n=370)	2017 Total (n=247)	2014 Total (n=699)	2023 Mailing List User (n=187)	2020 Mailing List User (n=210)	2017 Mailing List User (n=145)	2014 Mailing List User (n=239)
Highly Satisfied	56%	54%	55%	43% ▽	69%	71%	65%	53% ▽
Somewhat Satisfied	36%	39%	36%	48% △	24%	26%	28%	41% △
Dissatisfied	8%	7%	10%	9%	7%	4%	7%	6%

Mailing List Examples Shown in Survey

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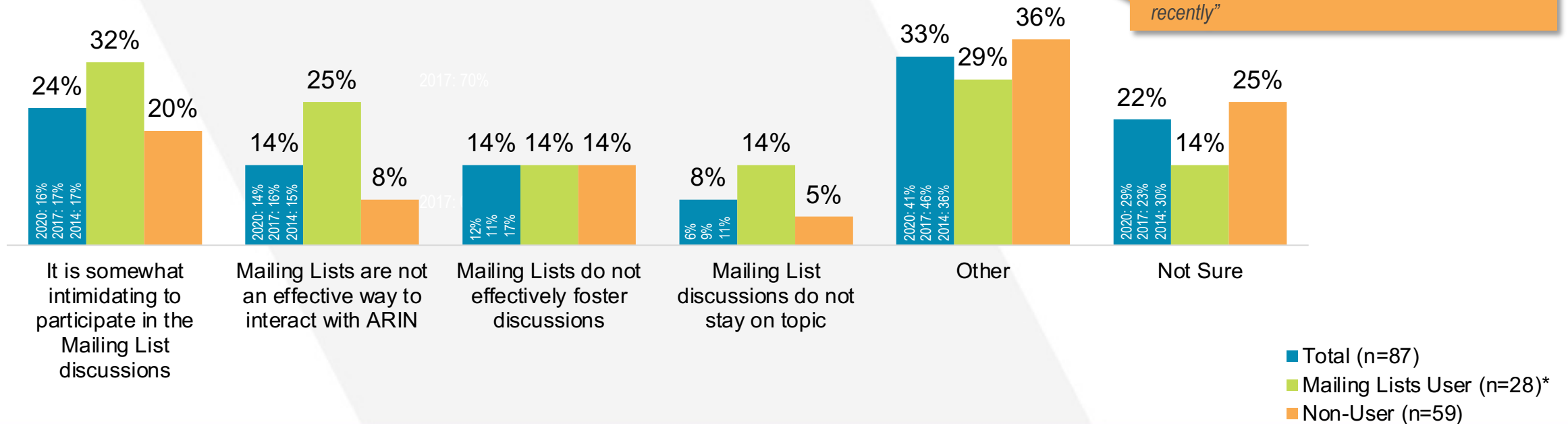*ARIN Tech Discuss*
ARIN Issued

Q15. How satisfied are you with your ability to comment and participate using ARIN Mailing lists?
▽ △ Denotes significantly higher/lower than 2023 | Note: numbers may not sum exactly to 100% due to rounding
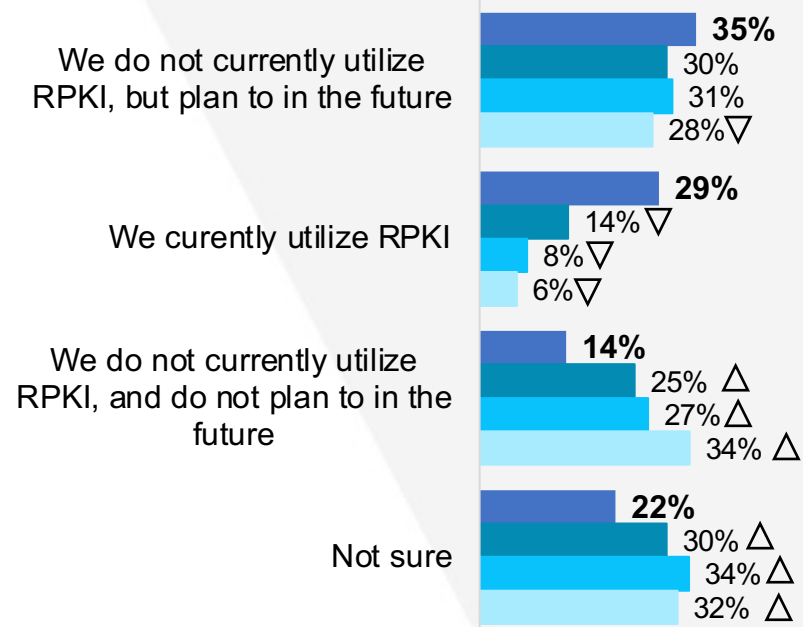
48

RPKI usage has more than doubled since 2020 but usage is still less than a third of organizations and IPv6 deployment also increased

- Community members who are highly familiar with ARIN and those in their profession 10 years or less are most likely to utilize RPKI in the future.

RPKI Usage
Total

We do not currently utilize RPKI, but plan to in the future
- **35%**
- 30%
- 31%
- 28% ▽

We curently utilize RPKI
- **29%**
- 14% ▽
- 8% ▽
- 6% ▽

We do not currently utilize RPKI, and do not plan to in the future
- **14%**
- 25% △
- 27% △
- 34% △

Not sure
- **22%**
- 30% △
- 34% △
- 32% △

IPv6 Deployment
Total

My organization has already deployed IPv6 in some manner
- **37%**
- 32%
- 36%
- 24% ▽

My organization intends to deploy IPv6 in the future but does not have a formal plan
- **30%**
- 32%
- 34%
- 46% △

My organizaion has no plans to deploy IPv6
- **21%**
- 20%
- 12% ▽
- 17%

My organization has a formal plan to deploy IPv6 in some manner
- **8%**
- 6%
- 9%
- 7%

Not sure
- **5%**
- 9%
- 8%
- 6%

Legend:
- 2023 (n=317)
- 2020 (n=370)
- 2017 (n=247)
- 2014 (n=699)

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 2023 | Note: numbers may not sum exactly to 100% due to rounding

50

American Innovation Index™

- 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.

- ARIN's Aii business innovation score of 69.3 is lower than technology sector average in 2022 of 73.6; a comparable benchmark is Lenovo which scored 68.9 among consumers in 2022.
- ARIN's Sii social innovation score of 61.3 is on par with the tech sector average in 2022 of 62.5. In comparison, Intuit's Sii in 2022 was 61.9.
- Note: the benchmarks are not perfect comparisons because they are based on consumer samples.

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.

Aii
69.3
+1.7 from 2020

Sii
61.3
-0.8 from 2020
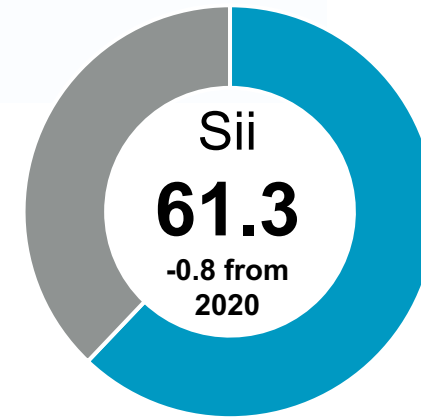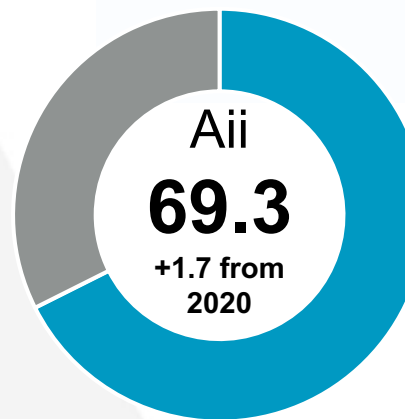
- The average Aii and Sii scores for all companies in 2022 was 71.4 and 65.6, respectively
- The averages for the Technology Sector were 73.6 and 62.5, respectively.

Note: The questions used to compute the Aii and Sii scores for for-profit companies have been adjusted in ARIN's survey to reflect its role as a member-based organization. ARIN's index scores are not directly comparable to the scores of the companies covered in the annual Aii study. To what extent do you agree or disagree with the following statements?

53

Nearly half of the community sees ARIN as a pioneer in their sector, while only a quarter believe ARIN offers innovative solutions for social problems

American Innovation Index^ **
Rated 6-7 on a 7-Point Scale

	ARIN is a pioneer in its sector	ARIN changes the internet sector with its products and services	ARIN is innovative	ARIN is a creative organization
2023	48%	44%	41%	39%
2020	45%	42%	39%	39%
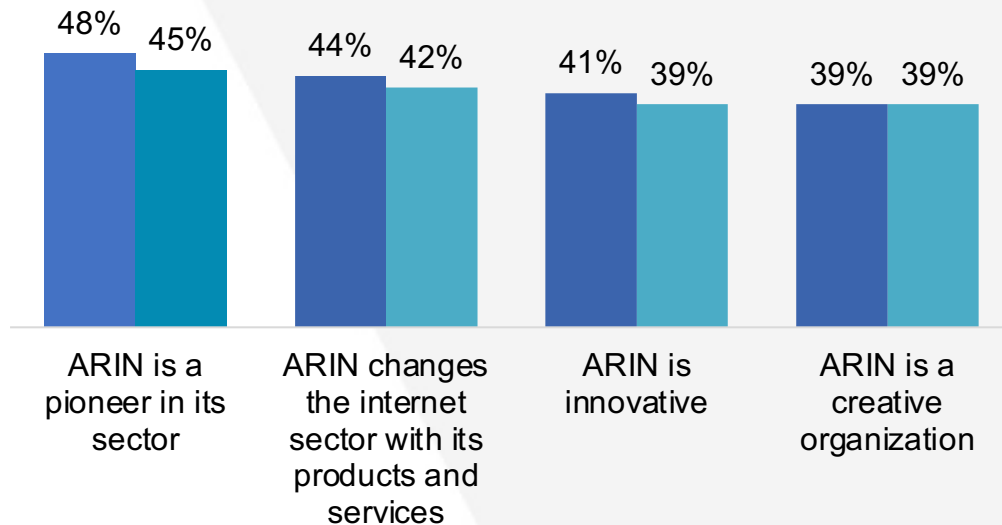
^Note: these questions constitute the American Innovation Index for membership organizations, Copyright 2023 by Rockbridge Associates, and may only be used or printed with permission.

Social Innovation Index^ **
Rated 6-7 on a 7-Point Scale

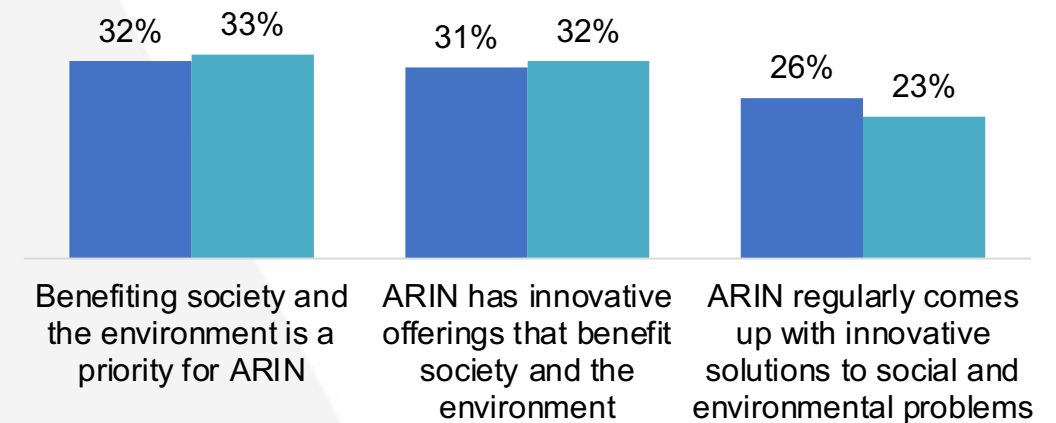|	Benefiting society and the environment is a priority for ARIN	ARIN has innovative offerings that benefit society and the environment	ARIN regularly comes up with innovative solutions to social and environmental problems
2023	32%	31%	26%
2020	33%	32%	23%

^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.

■ 2023 (n=317)
■ 2020 (n=370)

Demographics and Firmographics

Professional Characteristics

- The average years in the profession is 18 and there is a slight increase across all categories.
- Network engineers make up almost half of the community members who participated in the survey.

Years in Profession

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

Occupation

	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Network Engineer	46%	47%	42%	46%
Management	29%	26%	22%	26%
Systems Administrator	13%	15%	16%	17%
Software Coder/Developer	5%	4%	6%	3%▽
Marketing/Business Development	1%	1%	1%	1%
Attorney/Legal Services	0%	1%	0%	1%
Other	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 2023 | Note: numbers may not sum exactly to 100% due to rounding

56

- Community members come from a wide spectrum of organization types with an increase in Internet service providers compared to 2020.
- There is a slight decrease in the average number of employees.

Type of Company

	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
Internet service provider	27%	22%	27%	22%
Education	11%	9%	14%	18%△
Hardware/Software vendor	9%	8%	14%	5%▽
Network access provider	8%	9%	6%	5%
Internet content provider	7%	7%	8%	8%
Government	6%	6%	6%	6%
Mobile network provider	0%	1%	1%	1%
IPv4 transfer facilitator/broker	0%	1%	1%	*Not asked*
Other	23%	24%	19%	30%△
None of the above	7%	13%△	4%	5%

- Banking/ Finance, Consulting, Energy, Healthcare, Manufacturing, Retail, Transportation, Utilities, etc.

Number of Employees

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

Location of Company

	2023 (n=317)	2020 (n=370)	2017 (n=247)	2014 (n=699)
United States	83%	86%	86%	86%
Canada	10%	10%	9%	11%
Puerto Rico	1%	0%	1%	0%
Other	2%	4%	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 2023 | Note: numbers may not sum exactly to 100% due to rounding

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