



CUSTOMER SATISFACTION TRACKING RESEARCH

August 2020





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- 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 study conducted in 2017 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 previous surveys completed in 2014 and 2017

- This report provides results to a survey of ARIN members, customers, and community participants. An online survey was conducted between July 13 and August 2, 2020.
- 370 individuals completed the survey, and have the following relationships with ARIN:
 - 156: Has a direct allocation of IP addresses (IPv4, IPv6) from ARIN, and is a member.
 - 170: Has a direct assignment of Internet number resources (IPv4, IPv6, ASN) from ARIN.
 - 29: Has no direct Internet number resources from ARIN, but uses some ARIN services.
 - 15: Has no direct Internet number resources from ARIN, and does not use ARIN services, but is part of the ARIN community.
- The distribution across the four relationship categories in 2020 is similar to the last wave in 2017.
- The median survey time was 17 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.

- ARIN continues doing a good job of meeting the needs of its community, as the Loyalty Index, satisfaction and commitment to continuing to use ARIN if given a choice have all trended upward since 2014.
- 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 less than a fifth are 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 2017 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 2017 (38% vs 30%), as are organization's current utilization of RPKI (14% vs 8%).
- Email and ARIN Online are still the most common ways to receive information and the most preferred, but preference for ARIN Online decreased since 2017 (47% vs 56%), as did contact through ARIN Online (62% vs 70%).
- Participation in the Policy Development Process is down from 2017 (7% vs 14%) with the top reasons remaining not knowing how and not having the time to participate. However, community members are less likely this year to think they aren't eligible to participate (22% vs 33%) and are more likely to be happy with ARIN policy and not see the need to get involved (25% vs 18%) than 2017.
- There is increased interest in trainings for ARIN tools and services (51% vs 40%) and RPKI (45% vs 36%) since 2017, and less interest in IPv6 deployment training (43% vs 53%).



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.
- Since 2017, ARIN has moved slightly further away from meeting community expectations on all service dimensions except Security and ARIN Meetings.
- The overall quality gap increased from 2 points in 2017 to 10 points in 2020. While performance dropped only 3 points, expectations grew by 5 points, contributing to the wider gap.
- Communications and Outreach, Customer Service, Registration Services, and Engineering are key opportunities for improvement in 2020.

					POINTS FROM EXPECTATIONS		
					2020	2017	2014
Smallest Gaps	Overall	90%	85%	88%	10*	2	12
	Security	87%	89%		1*	1	
	Meetings	74%	81%	77%	3	4	12
	Internet Governance	90%	80%	88%	7	-7	7
	Communications and Outreach	84%	83%	87%	9*	4	17
	Customer Service	90%	90%	92%	9	7	13
	Registration Services	90%	88%	91%	10*	6	14
	Engineering	90%	87%	89%	11	2	10
			79%	85%	79%		
Largest Gaps		80%	83%	76%			
		86%	88%				
		71%	77%	65%			
		83%	87%	81%			
		75%	79%	70%			
		81%	83%	79%			
		80%	82%	77%			
		79%	85%	79%			

2020
2017
2014

*Note: attributes within dimension changed from 2017 to 2020 and scores are not comparable.



2020 Strengths for ARIN include:

- **Security and Meetings** are nearly meeting expectations; however, these tend to be less important areas to members/customers.
- While Customer Service has room for improvement on some attributes, ARIN improved slightly when it comes to having the right people for the job. **Having the right people and staff effectively interacting with customers and members are areas of high relative importance and moved from opportunities to strengths in 2020.**
- **Processing transfer requests in a timely manner is more important to customers and members this year and moved from a secondary opportunity in 2017 to a strength in 2020.** On the other hand, processing resource requests in a timely manner was a strength in 2017 but is now a key opportunity for improvement.
- Although no longer exceeding expectations on its **active role in Internet governance, it is a strength in 2020.**
- **Offering sufficient opportunity to obtain customer and member feedback** remains a strength in 2020.



Executive Summary – ARIN Performance Scorecard: Opportunities

2020 Key Opportunities

Performance area	Recommendations	Points from Expectations
Communications and Outreach	• Is a transparent organization	13
	• Communicates in a way that meets my needs	12
	• Provides training and materials that are useful to me	12
	• Clearly communicates the organization’s activities (meetings, elections, etc.)	10
	• I am able to easily navigate the website to find the content I need	9
	• Clearly communicates the organization’s future plans	8
Customer Service	• Providing timely responses to requests	15
	• Provides clear and accurate information to customers and members	10
	• Staff works with customers to resolve complex issues	9
Registration Services	• Process to obtain Internet number resources is clear and straightforward	17
	• Resource requests are processed in a timely manner	12
Engineering	• Tools and resources (such as WHOIS, WhoWas, DNS, RDAP, IRR, RPKI, etc) are easy to understand	13
	• New technical services and enhancements are delivered in a timely manner	12
	• Provides tools and user resources that are relevant and useful to me	11

- Timeliness (or lack thereof) was a top concern for community members in 2017, and while ARIN has since improved on processing transfer requests in a timely manner and managing community member's expectations, faster turnarounds for customer service responses and resource request processing are still expected. Therefore, **ARIN should continue its efforts to exhaust opportunities to limit the need for contact with customer service by offering self service features wherever possible.**
- Since there has been an increased training interest in use of **ARIN tools/services and RPKI**, providing more **training opportunities and clear helpful documentation will help clarify the process to obtain Internet number resources, manage members expectation of the process, as well as lessen the burden on Customer Service.**
- The website design that ARIN previously undertook improved the navigability to allow members to find the content they need. However, **continuous improvement on the website will help drive community members to the website** (instead of customer service) when they have questions or need information and set ARIN apart from competing organizations.
- **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 should study leaders in the technology industry (published in the American Innovation Index™), including Apple, Netflix, Microsoft and Adobe, and emulate their practices when designing its processes and interfaces. ARIN should also examine its values as an organization and **consider activities and communication that stresses its leadership in ensuring an open internet.**

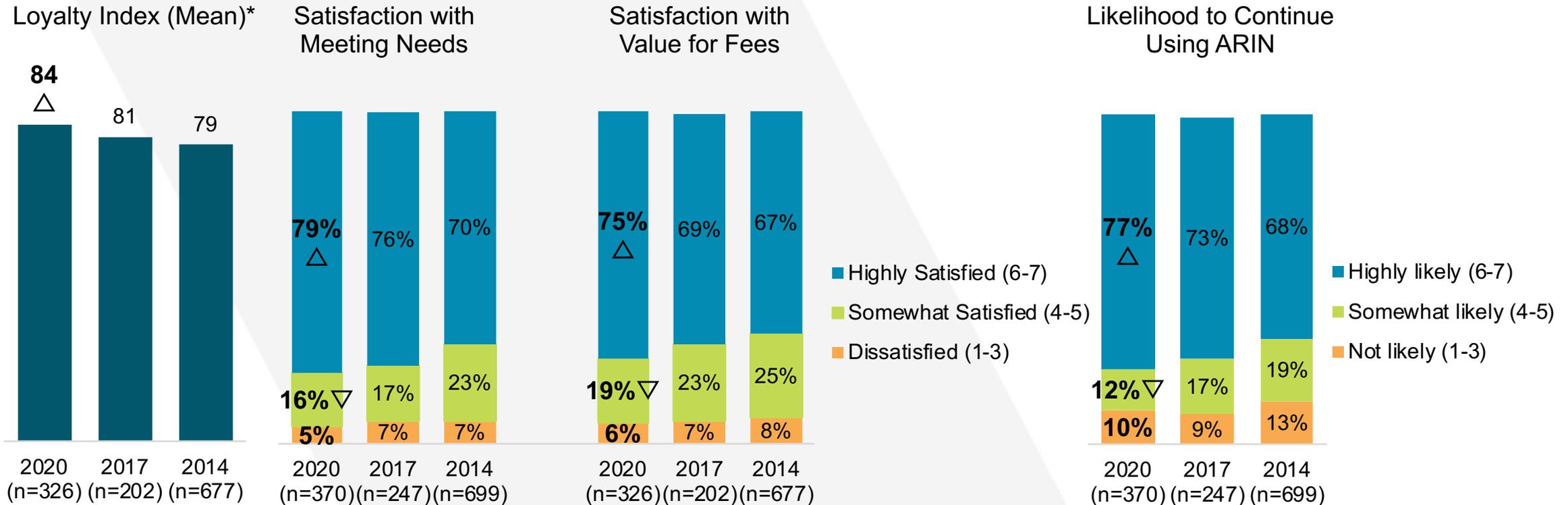
Satisfaction and Loyalty



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

- The Loyalty Index, satisfaction and commitment to continuing to use ARIN if given a choice have all trended upward since 2014.
- Community members from organizations with less than 100 employees are more dissatisfied with ARIN meeting their organization's needs and the value they receive for fees than larger organizations.

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

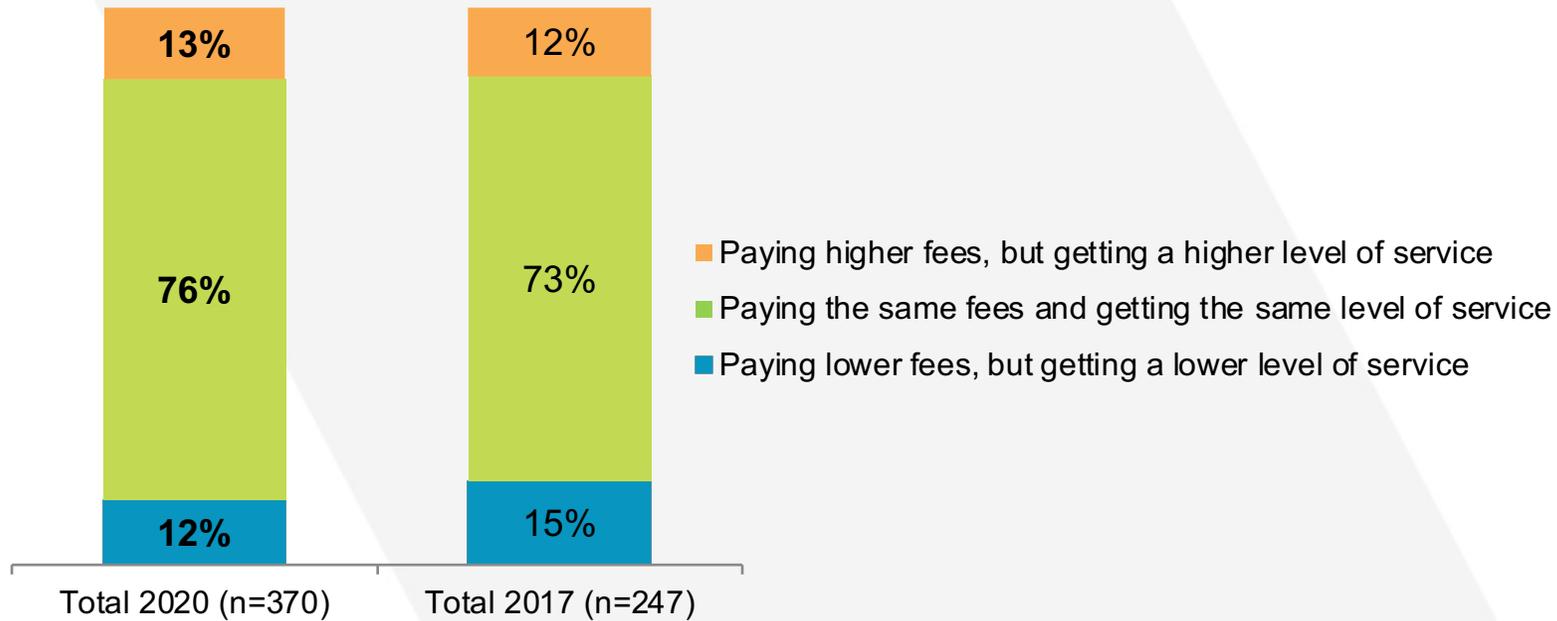
Q1. Thinking about your interactions with ARIN and the products and services it provides, how satisfied are you with ARIN in meeting your organization's needs? | Q2. How satisfied are you with the value you receive from ARIN based on the fees you pay? | Q3. If you had the option to choose another registry services provider, how likely would you be to continue using ARIN services? | ▲ ▼ denotes significantly higher/lower than 2017 and ▼ ▲ denotes significantly higher/lower than 2014



Similar to 2017, the majority prefer to continue paying the same fees and getting the same level of service

- However, customers are more likely to prefer higher fees for a higher level of service than members (16% versus 8%).
- Similarly, those who are newer to their profession (10 years or less) are more likely to prefer higher fees for more service than professionals with 21 or more years experience (23% vs 9% respectively).

ARIN's Fees and Level of Service**





Highly satisfied community members find ARIN supportive and easy to work with, while those less satisfied cite difficulty completing their transactions

Reasons for High Overall Satisfaction

(6 or 7 on 7-point Satisfaction Scale)

*"ARIN has been easy to work with. **Web site improvements** have been great."*

*"**Clear documentation** and while I would like a faster response time, the expectation is set well on ticket responses."*

*"I have always found them to be **responsive, helpful and professional.**"*

*"Because **ARIN support** people have always been very patient and helpful with us as we have stumbled through the changes we have had to make."*

*"Things run pretty smoothly. The billing and organization of billing information and descriptions on **invoices is a little vague for my taste.** For example, invoices ought to specify the actual IP address blocks and ASN numbers being billed, as opposed to the current generic descriptions."*

*"Very **responsive** and **coordinates very well** with change requests when dealing with multiple Parties."*

*"I was able to obtain what I needed and the process was **straight forward.**"*

Reasons for Low Overall Satisfaction

(1 or 2 on 7-point Satisfaction Scale)

*"**Clunky website and confusing identity permission schemes** make this an annual (obligated) experience I don't look forward to."*

*"ARIN is becoming very **bureaucratic.** They have rejected the application of one of our customers because they do not have a significant presence in ARIN.. but they are part of a huge group that has quite a significant presence in ARIN..."*

*"**ARIN charges small IP block users too much and big users too little.** It tries to assert control over assets that predate its existence. IPV6 is a nearly unconstrained resource. Getting direct allocations should be trivial and nearly free."*

*"**The hoops to do minor changes is over the top.** I need to change 1 email and I have to submit multiple documents to prove stuff."*

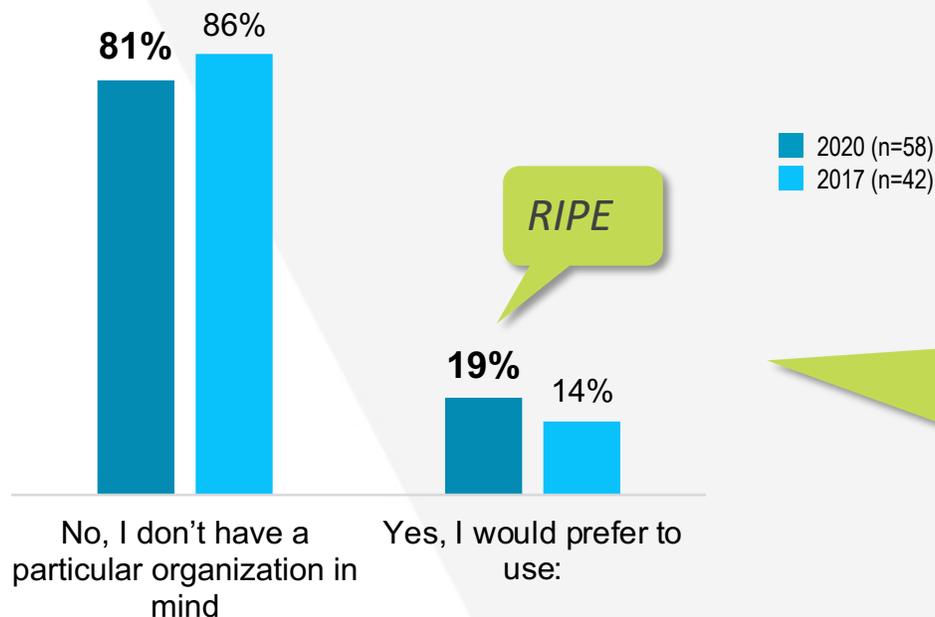
*"**Lack of proper tools for RPKI** in comparison to RIPE/APNIC defacto no noteworthy IRR database capabilities in comparison to RIPE/APNIC"*



While a quarter might prefer to use a different registry than ARIN if given a choice, only one in five can cite a specific organization they would prefer

Preferred Organizations over ARIN

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



Reasons for Preferring other Organizations over ARIN

(Among those who had a particular organization in mind)

"1. RIPE NCC's RPKI TAL is available without requiring that people agree to a contract 2. RIPE NCC's membership fee structure is simpler."

*"Better form validation on web update. **Faster turnaround times, clearer documentation.** ARIN documentation is confusing, as if written by lawyers."*

*"**Clearer fee structure,** documentation and portal. Faster turnaround on tickets. Great hosted RPKI facility."*

*"**Simple policies, no pre-approval required,** they act as a registry and not as a company vetting service..."*

*"**No restrictive legal terms** on RPKI use."*

*"**Refund of fees** when there is an excess collected."*



Clearer documentation, faster transactions, 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

"Faster response times to tickets. 1 business day. Clearer documentation. More training. APNIC has better training. RIPE has better documentation.

"- More transparency about processes. - Faster turnaround on transactions that require multiple round-trips. - Stick to core registry mission and adjust fees to match. Members/users should not be compelled to fund the ancillary activities. (If ARIN wants to do that, create an ARIN foundation, contribute a nominal amount from the ARIN budget, and then solicit donations from organizations that wish to fund such activities.)"

"Be more innovative and be more relevant. Work on freeing up and better managing allocation and use of IPV4 space under ARIN's control. There is a fine line to walk between being the IP police and better managing resources. ARIN should get better control of resources that are mis-allocated and could be better allocated."

"More Canadian in person meeting or mini-conferences. On-line or Canadian training for RPKI or IRR."

Additional Services ARIN Could Offer to Benefit Companies

"Continue to improve the web support and an API for the IRR data supported by ARIN."

"Help smaller ISP's understand the need for deploying IPv6."

"Online chat to help with transfers or other issues that come up where we need immediate help."

"More online training tools."

"A better dashboard for RPKI (More direct access rather than per-range access) A better method of retrieving all suballocations (via REST for example)."

"I wish ARIN would allow direct delegation of zones in reverse DNS for reassigned /24s. That would allow me to deploy DNSSEC on those zones without needing the cooperation of the organization which directly allocated the supernets."

Performance & Expectations

Overview of How Performance and Expectation are Measured

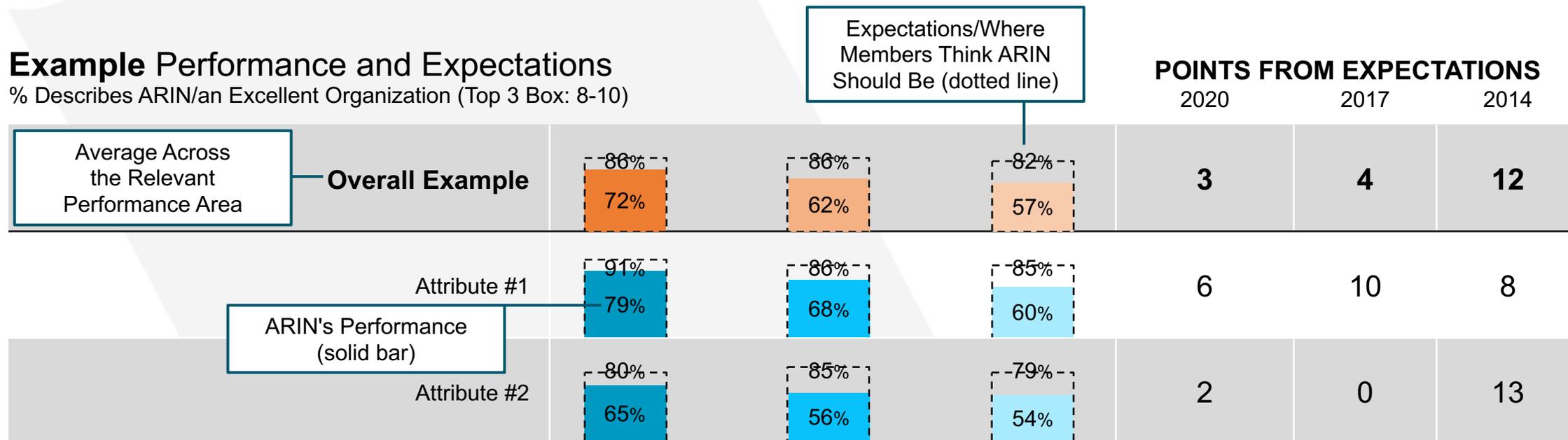
- A scorecard was developed by capturing perceived performance and expectation on 34 specific attributes grouped into 9 dimensions: Policy Development (6 items), Registration Services (4), Engineering (4), Financial Services (2), Communications/Outreach (7), ARIN Meetings (3), Customer Service (5), and Internet Governance (2), and Security (1).
- For each of the 34 items, community members were asked two questions:
 - 1) 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)



Expectations/Where Members Think ARIN Should Be (dotted line)

Average Across the Relevant Performance Area

ARIN's Performance (solid bar)

Difference Between Expectation and Performance

Darker bars show current data (2020) and lighter bars show previous data (2017 and 2014)



Note: Data not real | Dashed lines show expectations | 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 2017, ARIN has moved further away from meeting expectations on all service dimensions except Security and ARIN Meetings

- The overall quality gap increased from 2 points in 2017 to 10 points in 2020. While performance dropped only 3 points, expectations grew by 5 points, contributing to the wider gap.

Overall (1 of 2) Performance and Expectations

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

				POINTS FROM EXPECTATIONS		
				2020	2017	2014
Overall	90%	85%	88%	10*	2	12
	80%	83%	76%			
Security	87%	89%		1*	1	
	86%	88%				
Meetings	74%	81%	77%	3	4	12
	71%	77%	65%			
Policy Development	84%	83%	87%	5	1	13
	79%	82%	74%			
Financial Services	90%	88%	93%	6	2	10
	84%	86%	83%			



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.



Communications and Outreach, Customer Service, Registration Services, and Engineering are key opportunities for improvement in 2020

Overall (2 of 2) Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

	2020	2017	2014	2020	2017	2014
Overall	90% 80%	85% 83%	88% 76%	10*	2	12
Internet Governance	90% 83%	80% 87%	88% 81%	7	-7	7
Communications and Outreach	84% 75%	83% 79%	87% 70%	9*	4	17
Customer Service	90% 81%	90% 83%	92% 79%	9	7	13
Registration Services	90% 80%	88% 82%	91% 77%	10*	6	14
Engineering	90% 79%	87% 85%	89% 79%	11	2	10



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ARIN nearly meets community expectations of an excellent provider to meet organization's security needs

ARIN Security Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

	2020	2017	2020	2017	2014
Overall ARIN Security	87% 86%	89% 88%	1*	1	<i>Not asked</i>
Services meet the security needs of my organization*	87% 86%	89% 88%	1*	1	<i>Not asked</i>



*Note: Attribute wording changed from 2017 to 2020 and results are not comparable. 2017 attribute: "Ensures a high level of security."

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



Performance on meetings dropped since 2017, but expectations also dropped, resulting in a slight improvement in the overall gap

- Members rate ARIN’s performance on meeting content higher than customers (70% vs 51%). Further, those who are highly familiar with ARIN rate the meeting content higher (67% vs 45% who are less familiar).
- ISPs rate ARIN higher on election process features than non-ISPs.

ARIN Meetings Performance and Expectations

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

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

■ 2020
■ 2017
■ 2014



ARIN's performance on Policy Development dropped slightly from 2017 to 2020 in all performance areas, but the gap is still much higher than the baseline year

- Those highly familiar with ARIN rate its performance on policy development higher than those less familiar, particularly on allowing individuals to participate, providing effective oversight, creating a useful and fair resource, and adapting quickly to change.

ARIN Policy Development (1 of 2) Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

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

■ 2020
■ 2017
■ 2014



ARIN has an opportunity to improve on policy development processes that create fair number resource management and that can change quickly enough

ARIN Policy Development (2 of 2) Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

	2020	2017	2014	2020	2017	2014
Overall ARIN Policy Development	79%	82%	74%	5	1	13
The Board is effective in their oversight of the Policy Development Process	78%	82%	76%	7	0	14
Has a Policy Development Process which creates useful and fair Internet number resource management policy	78%	82%	75%	9	5	15
Policy Development Process allows policies to change quickly enough in response to changes in the industry	73%	78%	69%	10	5	16



↑ STRENGTH
↓ OPPORTUNITY



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



Expectations for clear invoicing and payment procedures slightly increased, creating a higher gap in performance from expectations compared to 2017

ARIN Financial Services Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

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





ARIN no longer exceeds expectations on Internet Governance as it did in 2017, which is due to a combination of increased expectations and slightly lower performance

ARIN Internet Governance Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

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



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



ARIN continues to slightly improve the website to make it easily navigable, but needs to focus on clearly communicating future plans and activities

ARIN Comms/Outreach (1 of 2) Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

	2020	2017	2014	2020	2017	2014
Overall ARIN Communications and Outreach*	84% 75%	83% 79%	87% 70%	9*	4*	17*
Offers sufficient opportunities to obtain customer and member feedback	83% 81%▲	75% 78%	87% 71%	2	-3	16
Clearly communicates the organization's future plans	76% 67%	79% 74%	85% 68%	8	5	17
I am able to easily navigate the website to find the content I need	86% 77%▲	86% 74%	90% 68%	9	12	22
Clearly communicates the organization's activities (meetings, elections, etc.)	87%▲ 77%▲	87% 82%	79% 70%	10	5	9

↑ STRENGTH
↓ OPPORTUNITY

■ 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. | 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. | Dashed lines show expectations | ▲ ▼ denotes significantly higher/lower than 2017 and ▽ ▲ denotes significantly higher/lower than 2014



Performance falls short of expectations in terms of being transparent, providing useful training, and communicating in a way that meets members' needs

ARIN Comms/Outreach (2 of 2) Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

	2020	2017	2014	2020	2017	2014
Overall ARIN Communications and Outreach*	84% 75%	83% 79%	87% 70%	9*	4*	17*
Provides training and materials that are useful to me	77% 66%			12	<i>Not asked</i>	<i>Not asked</i>
ⓘ Communicates in a way that meets my needs	91% 79%	88% 81%	90% 74%	12	7	16
ⓘ Is a transparent organization	91% 78%△	84% 83%	90% 71%	13	1	19



*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. | ⓘ denotes relative high importance

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ARIN Customer Service performed slightly better in having the right people for the job on staff, but the timeliness of responses to requests still performs well below the high expectations of customers and members

ARIN Customer Service Performance and Expectations

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

POINTS FROM EXPECTATIONS

2020

2017

2014

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

↑ STRENGTH
↓ OPPORTUNITY

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



Registration Services remains a key opportunity due to its gap, which has widened some since 2017 but is better than the baseline

- There is a substantial gap in timeliness of requests, a high importance area where expectations have risen; processing transfers in a timely manner is also important, but this area is closer to meeting expectations in 2020.
- There is also a substantial gap in how clear and straightforward the process is to obtain internet number resources.

ARIN Registration Services Performance and Expectations

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

POINTS FROM EXPECTATIONS

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

↑ STRENGTH
↓ OPPORTUNITY

■ 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.

ⓘ denotes relative high importance



ARIN Engineering experienced the most notable change since 2017 with most attributes falling significantly in performance

- Providing easily understandable tools and resources remains the biggest opportunity area, while providing relevant and useful tools/resources and timely delivery of services and enhancements have become bigger opportunities this year.

ARIN Engineering Performance and Expectations

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

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

↑ STRENGTH
↓ OPPORTUNITY

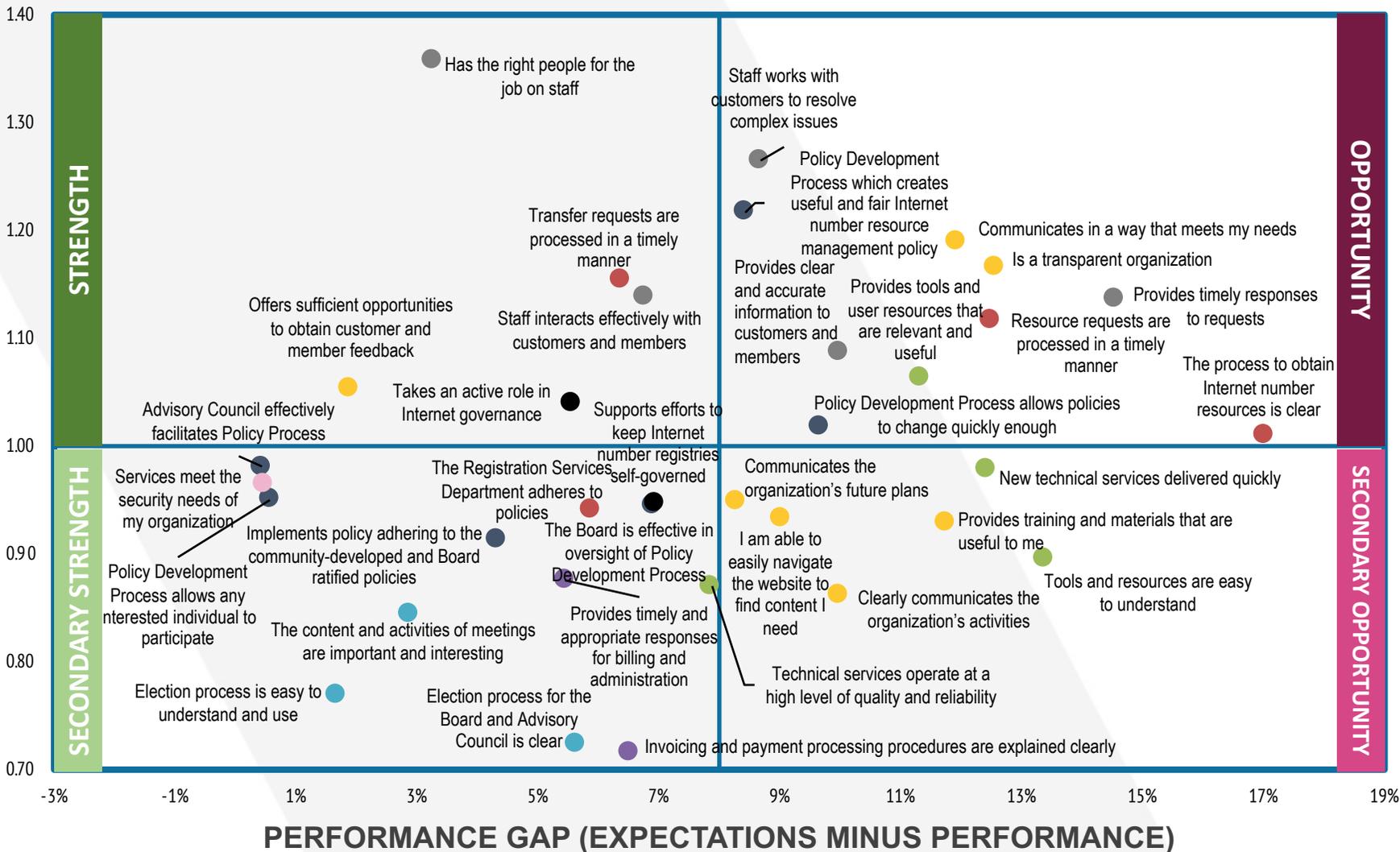
2020
2017
2014

- 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



The top strength of ARIN is having the right people for the job on staff, while major opportunity areas include customer service (i.e., resolving complex issues, timely responses) and communications (i.e., meeting needs, transparency).

IMPACT ON MEAN LOYALTY



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



Having the right people for the job and effective staff interaction shifted from opportunities in 2017 to strengths, while some former strengths (transparency, timely resource requests, and useful tools) have become opportunities

Quadrant Change Summary

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

OPPORTUNITY

SECONDARY OPPORTUNITY

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, while there remains large uncertainty about how ARIN uses its financial resources

- 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 more familiar with ARIN, ISPs, and organizations with less than 100 employees are more likely to view ARIN as bureaucratic.

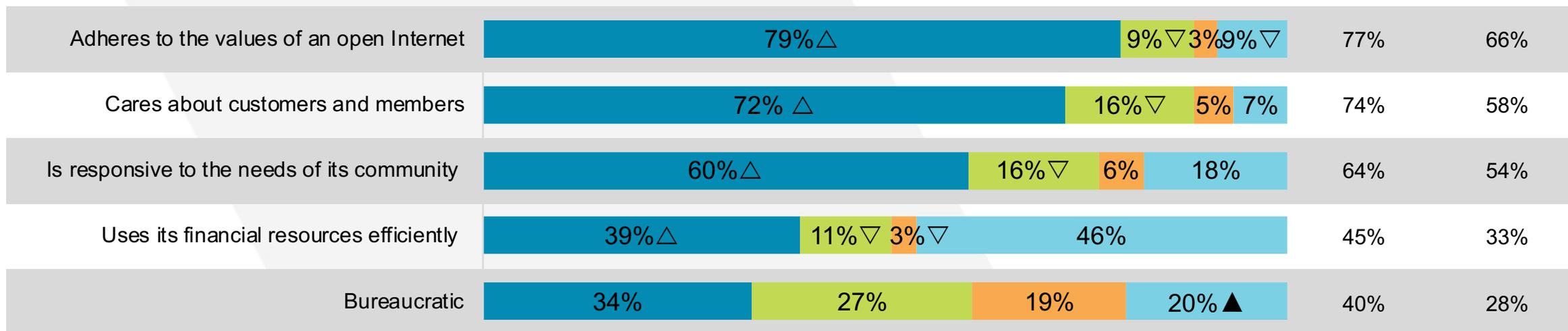
Descriptions of ARIN

2020 Total (n=370)

Describes ARIN (8-10)

2017
(n=247)

2014
(n=699)



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



Priorities for improving ARIN’s image remain in use of financial resources and responsiveness to the needs of its community

- Community members do not have negative perceptions towards either, but they are especially not familiar with ARIN’s efforts in using its resources efficiently.

ARIN Image

2020 Total (n=370)

	Priority Index*	Importance^	% Describes Well (8-10)
Uses its financial resources efficiently	1.4	23%	39%
Is responsive to the needs of its community	1.0	26%	60%
Cares about customers and members	0.7	24%	72%
Adheres to the values of an open Internet	0.5	24%	79%
Bureaucratic**	0.2	3%	34%

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

*Priority Index = Importance x % Needs Improvement (rated 1-7) * 10 **Given the negative connotation of “bureaucratic,” % improvement is flipped (rated 8-10) for this attribute when input into the priority index calculation

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

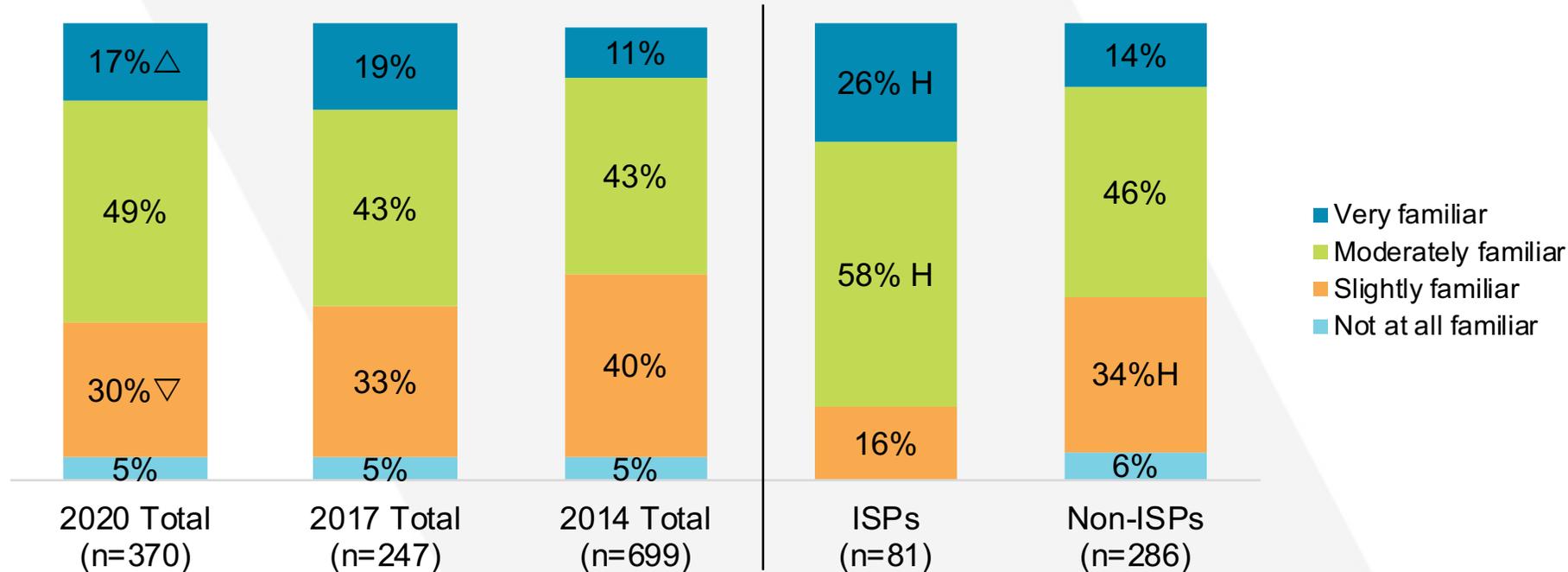
Familiarity & Usage of ARIN Products & Services



Two-thirds of community members are moderately or very familiar with ARIN and its activities, about the same as 2017.

- Familiarity is higher among community members from ISPs, network engineers, and professionals in smaller companies (less than 100 employees).

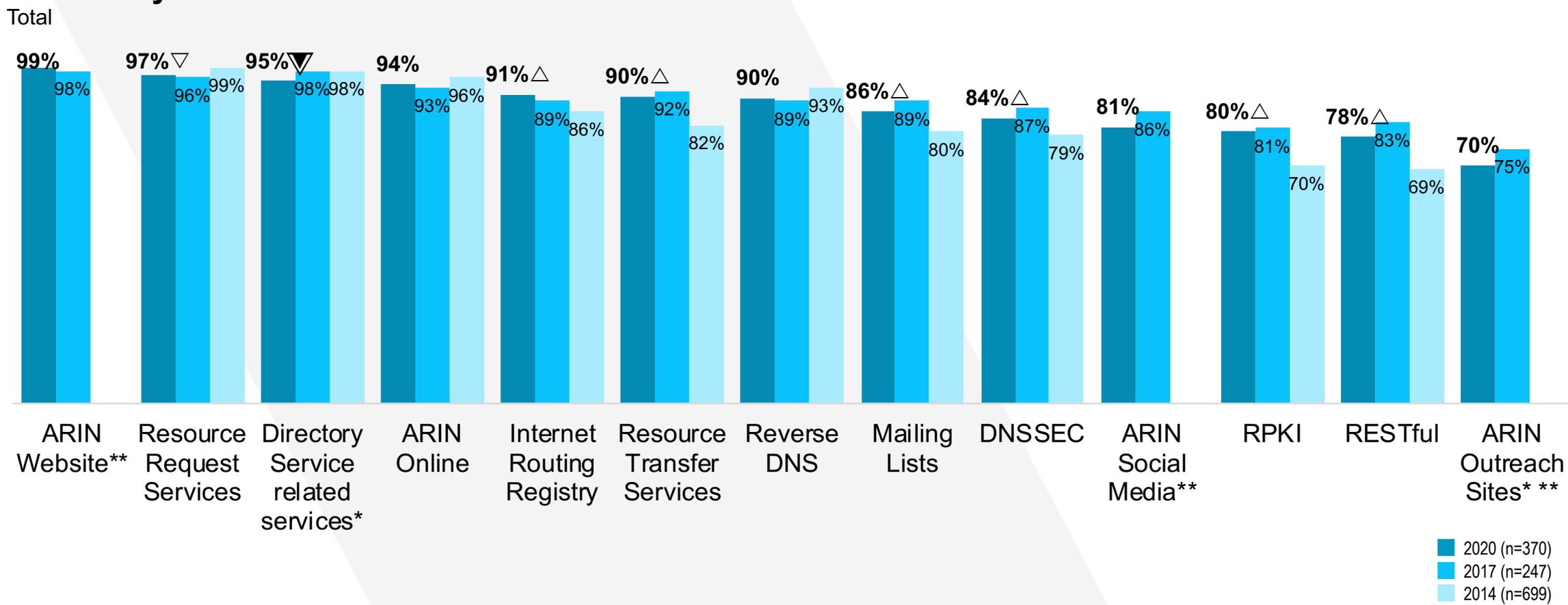
Familiarity with ARIN





At least 7 in 10 community members are familiar with all ARIN products and services, while levels of familiarity are similar to 2017 for nearly all services

Familiarity with ARIN Products and Services



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 2017 and ▼ ▲ denotes significantly higher/lower than 2014 | *Note: Slight word change from 2017 | **Note: New question/addition in 2017



The ARIN website, directory service-related services, and ARIN online are still the most frequently used products and services, while RPKI usage is up

Use of ARIN Products and Services

2020 Total (n=370)

Percent Used

		2020 (n=370)	2017 (n=247)	2014 (n=699)	
Directory Service related services*	54% (Use Monthly or More), 32% (Use Less than Monthly), 10% (Never Use)	86% ▽	91%	91%	
<p><i>"Mostly unaware of it, so I likely had no need to visit."</i></p> <p><i>"No needs arose."</i></p> <p><i>"Not sure of what it provides I don't get from Web."</i></p> <p><i>"Not sure why I would"</i></p>	ARIN Website	48% (Use Monthly or More), 48% (Use Less than Monthly), 3% (Never Use)	96%	94%	Not asked
	ARIN Online	40% △ (Use Monthly or More), 46% ▽ (Use Less than Monthly), 8% (Never Use)	86%	83%	88%
	Reverse DNS	34% △ (Use Monthly or More), 35% (Use Less than Monthly), 21% (Never Use)	69%	68%	67%
	Mailing Lists	31% △ (Use Monthly or More), 26% △ (Use Less than Monthly), 29% ▽ (Never Use)	57% △	58%	34%
Internet Routing Registry	28% ▲ (Use Monthly or More), 44% (Use Less than Monthly), 18% ▽ (Never Use)	72% △	69%	55%	
DNSSEC	13% △ (Use Monthly or More), 27% △ (Use Less than Monthly), 44% ▽ (Never Use)	40% △	41%	25%	
ARIN Social Media	13% ▽ (Use Monthly or More), 19% (Use Less than Monthly), 50% (Never Use)	32%	38%	Not asked	
RPKI	12% △ (Use Monthly or More), 26% △ (Use Less than Monthly), 42% ▽ (Never Use)	38% ▲	30%	18%	
RESTful	12% △ (Use Monthly or More), 25% (Use Less than Monthly), 42% (Never Use)	37% △	44%	27%	
Resource Request Services	11% △ (Use Monthly or More), 72% ▽ (Use Less than Monthly), 13% △ (Never Use)	83% ▽	87%	92%	
ARIN Outreach Sites*	7% ▽ (Use Monthly or More), 19% ▽ (Use Less than Monthly), 45% ▲ (Never Use)	26% ▽	40%	Not asked	
Resource Transfer Services	6% △ (Use Monthly or More), 46% △ (Use Less than Monthly), 38% ▽ (Never Use)	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. | Q9a. Why haven't you used ARIN Online?
 ▲ ▽ denotes significantly higher/lower than 2017 and ▽ △ denotes significantly higher/lower than 2014 | *Note: word change in 2020 | Note: % not familiar not shown | Note: numbers may not sum exactly due to rounding

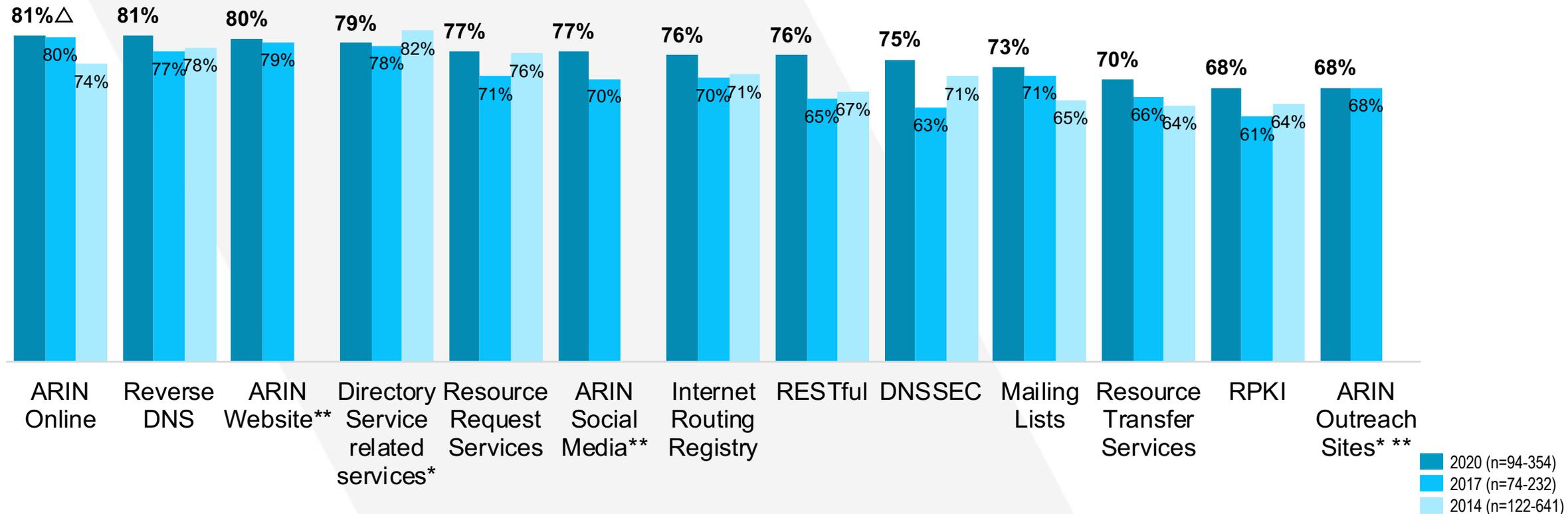


Satisfaction remains high with ARIN's most frequently used products and services

- While changes are not significant compared to 2017, satisfaction with services has trended upward from 2017, increasing for 12 out of 13 product/services.

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

Among those who have used product or service



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

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

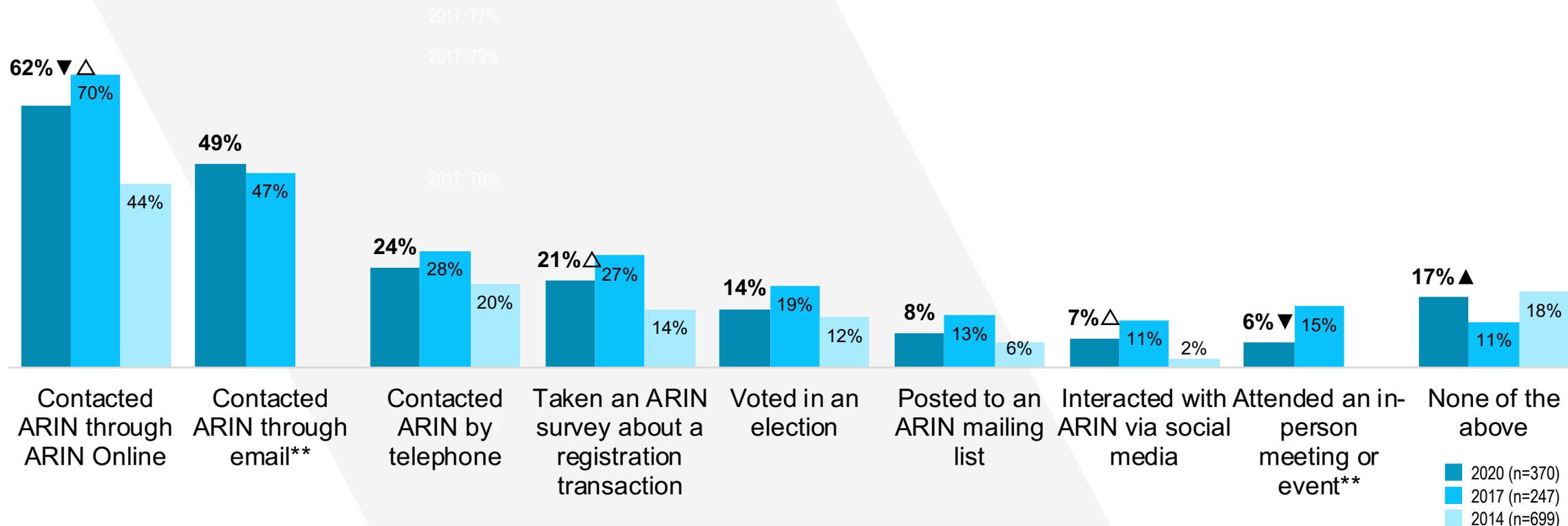


ARIN Online is still the most common way members of the community contact ARIN, although less so since 2017

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

Contact with ARIN in the Past 12 Months

Total

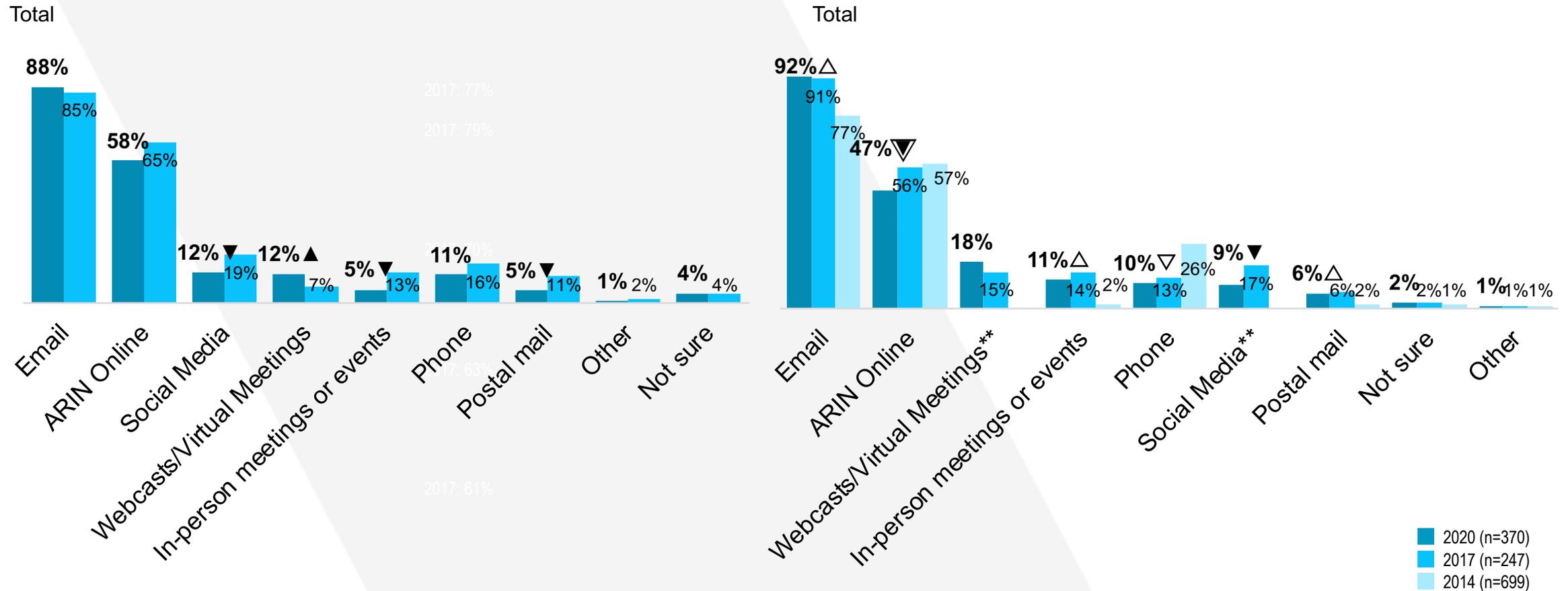


Q12. In the past 12 months, in which of the following ways have you contacted and/or interacted with ARIN? Please check all that apply
 ▲ ▼ denotes significantly higher/lower than 2017 and ▼ ▲ denotes significantly higher/lower than 2014 | **Note: New question/addition in 2017

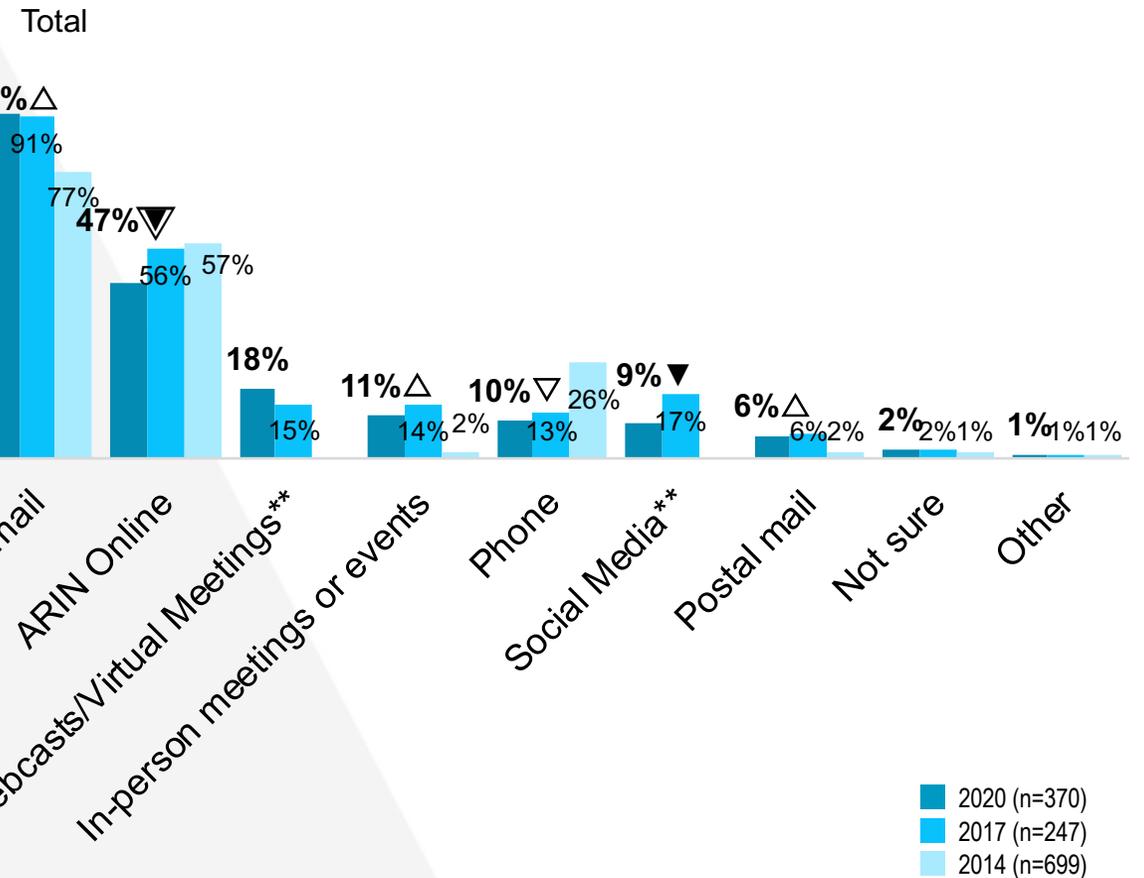


Email and ARIN Online are still the most common ways to receive information and the most preferred, although ARIN online is less preferred compared to 2017

Current Method of Receiving Information/Updates from ARIN**



Preferred Method of Receiving Information/Updates from ARIN



■ 2020 (n=370)
 ■ 2017 (n=247)
 ■ 2014 (n=699)

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 2017 and ▼ ▲ denotes significantly higher/lower than 2014 | **Note: New question/addition in 2017



Participation in the Policy Development process declined since 2017 with the top reasons being not knowing how and not having the time to participate

- More community members are happy with ARIN policy and do not see a need to get involved compared to 2017

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



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

Method of Participation**	2020 (n=26*)	2017 (n=35)
Posted to the Public Policy Mailing List	58%	60%
Attended a Public Policy and Members' Meeting – In-person	31%	57%
Attended a Public Policy and Members' Meeting – Remotely (webcast)	62%	29%

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 2017 and ▼ △ denotes significantly higher/lower than 2014 | *Caution; small sample size | *Note: Reasons less than 10% not shown | **Note: New question/addition in 2017

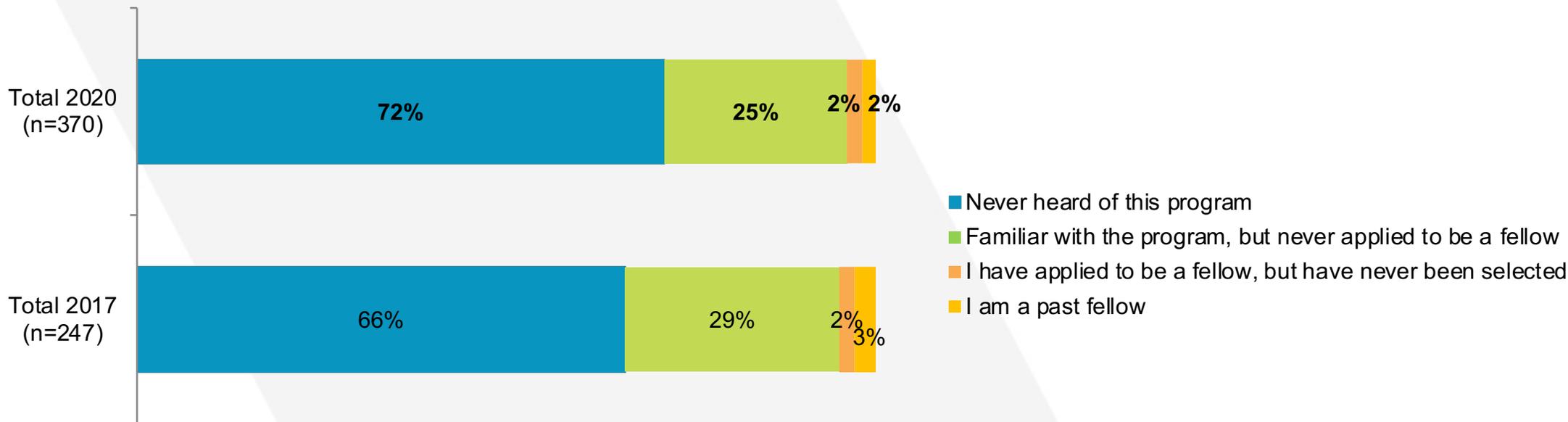


Familiarity with the ARIN Fellowship program remains low with about three quarters having never heard of the program

- Members, those highly familiar with ARIN, ISPs, and organizations with less than 100 employees are more likely to be familiar with the ARIN Fellowship program.

Familiarity with the ARIN Fellowship Program**

Total



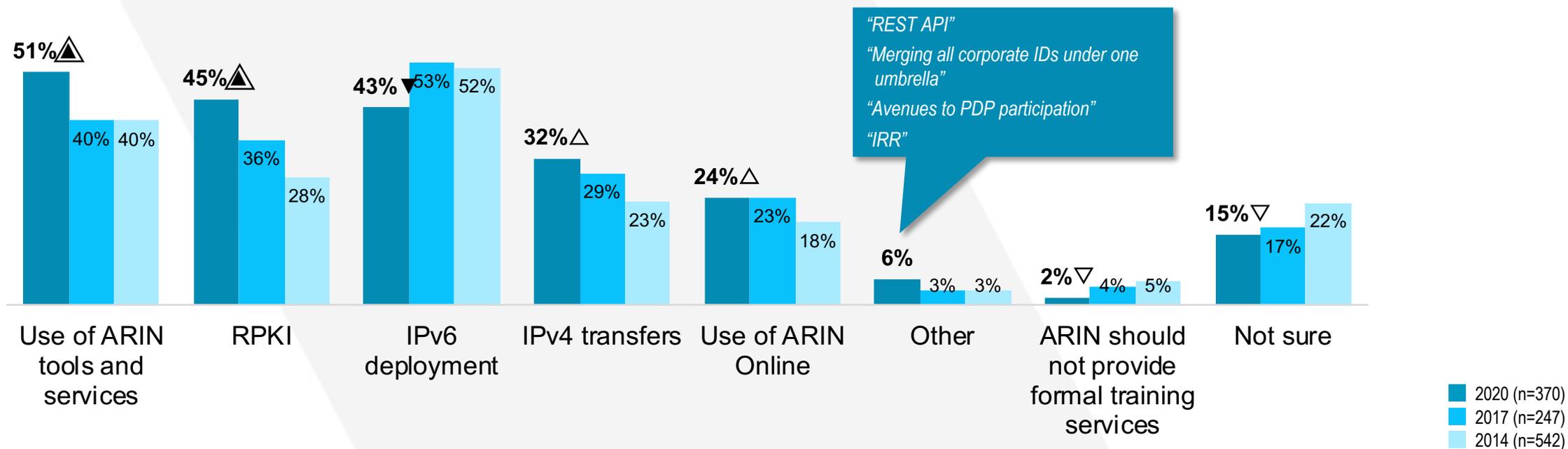


There is increased interest in more information on how to use ARIN tools and services and RPKI training since 2017 and less interest in IPv6 deployment

- In particular, those from Canada are more likely to be interested in training for the use of ARIN tools and service, while network engineers and ISPs are more likely to be interested in RPKI training.

Training Interest

Total



Q16. For which of the following topics would you be interested in formal training provided by ARIN? Please select all that apply.

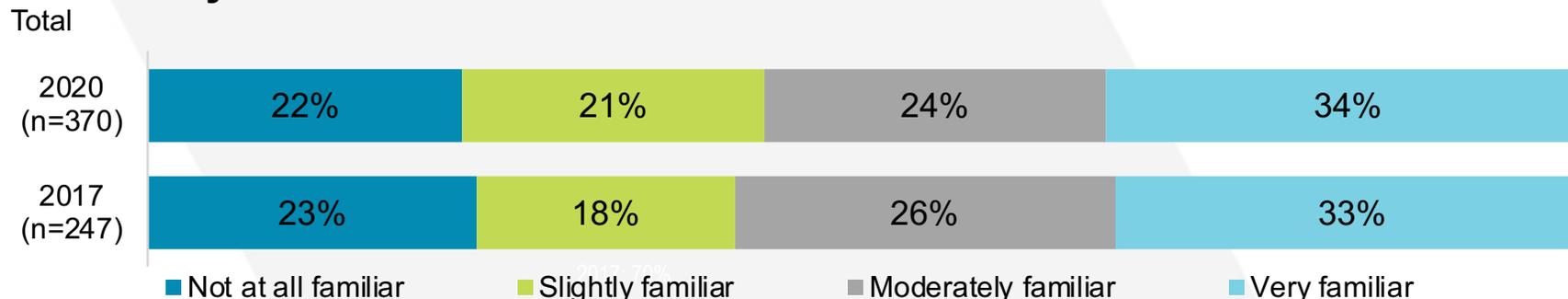
▲ ▼ denotes significantly higher/lower than 2017 and ▼ ▲ denotes significantly higher/lower than 2014



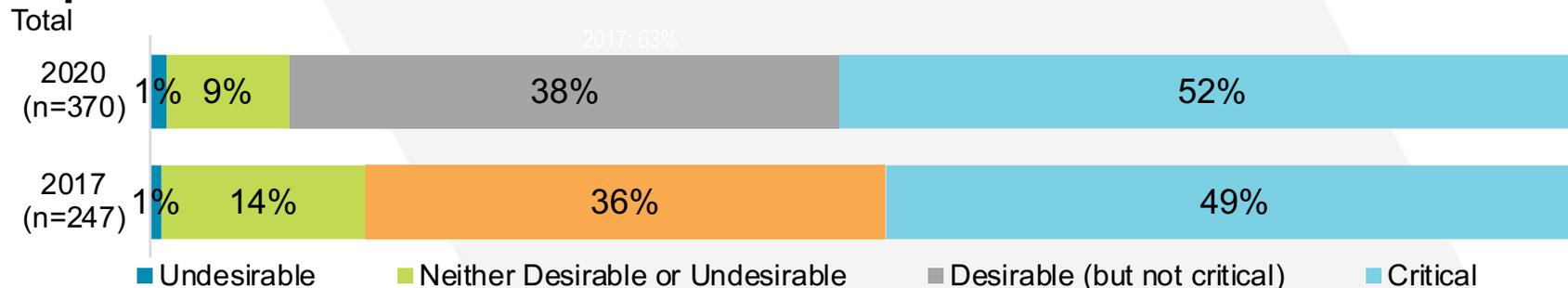
A third are very familiar with ARIN's annual POC validation process, and half believe it is a critical process

- Network engineers are more likely than system administrators to be familiar with the POC validation process (42% vs 22%) and believe it is critical (57% vs 41%).

Familiarity with ARIN's Annual POC Validation Process**



Importance of ARIN's Annual POC Validation Process**

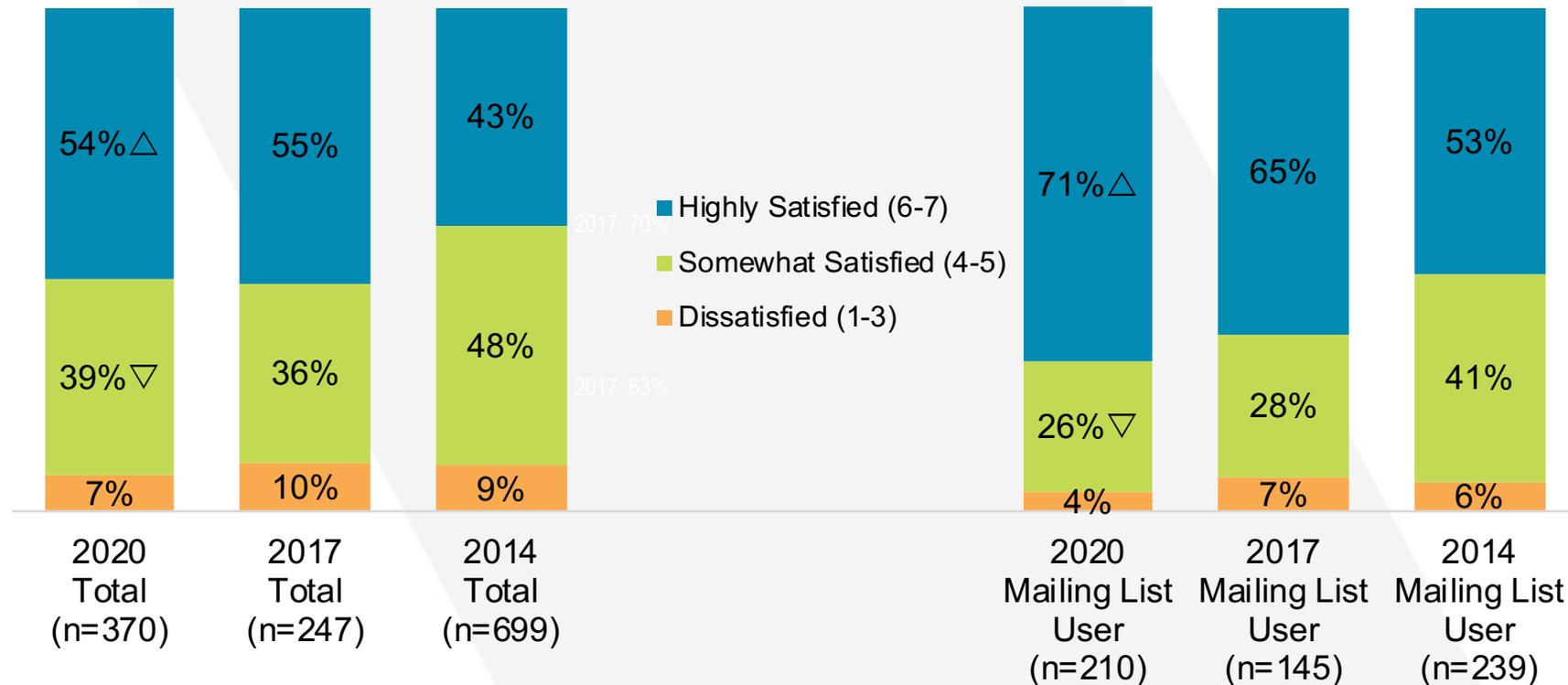




Satisfaction with ARIN's mailing list remains stable since 2017 with over half of community members and about three quarters of users being highly satisfied

- Satisfaction among users has trended upward since the baseline in 2014.

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

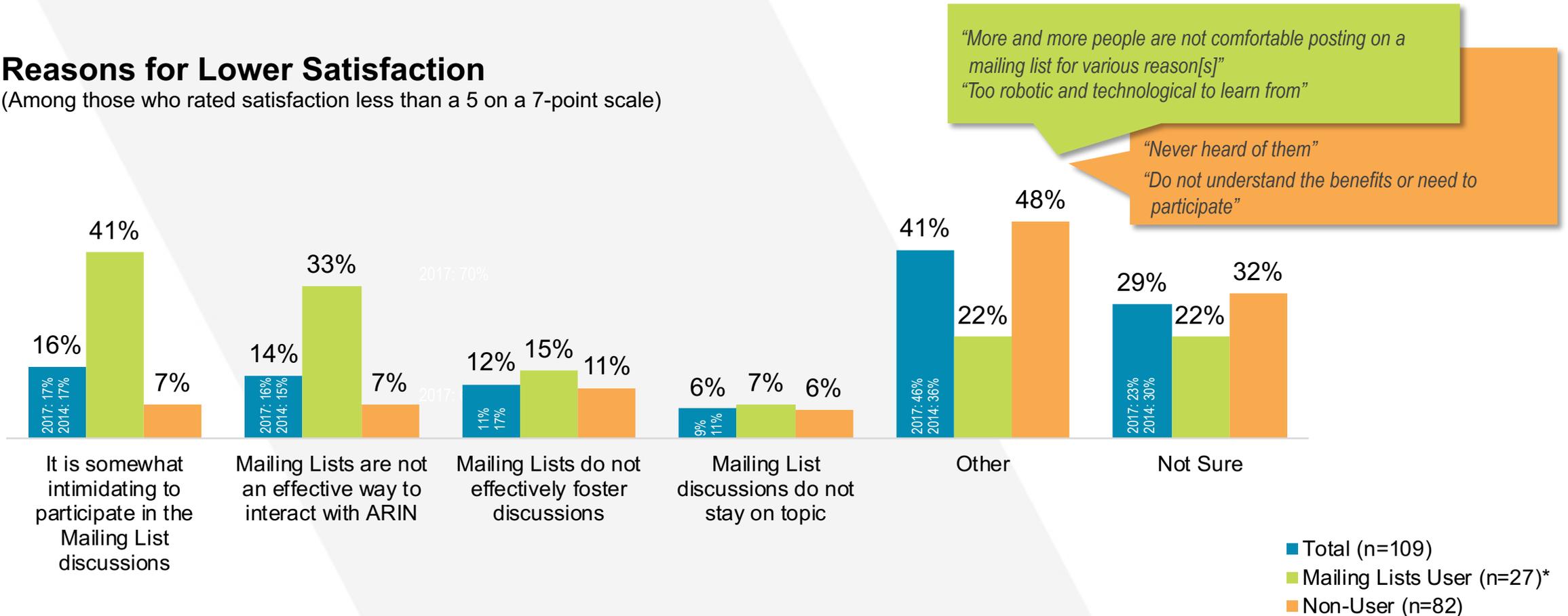


Current unsatisfied mailing list users believe the process is intimidating and ineffective, similar to 2017

- Non-users of mailing lists still have low satisfaction largely due to low awareness of the lists.

Reasons for Lower Satisfaction

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



Q15a. Why did you rate your satisfaction a [INSERT ANSWER FROM Q15]? Please select all that apply. ▲ ▼ denotes significantly higher/lower than 2017 and ▽ △ denotes significantly higher/lower than 2014 | *Caution; small sample size

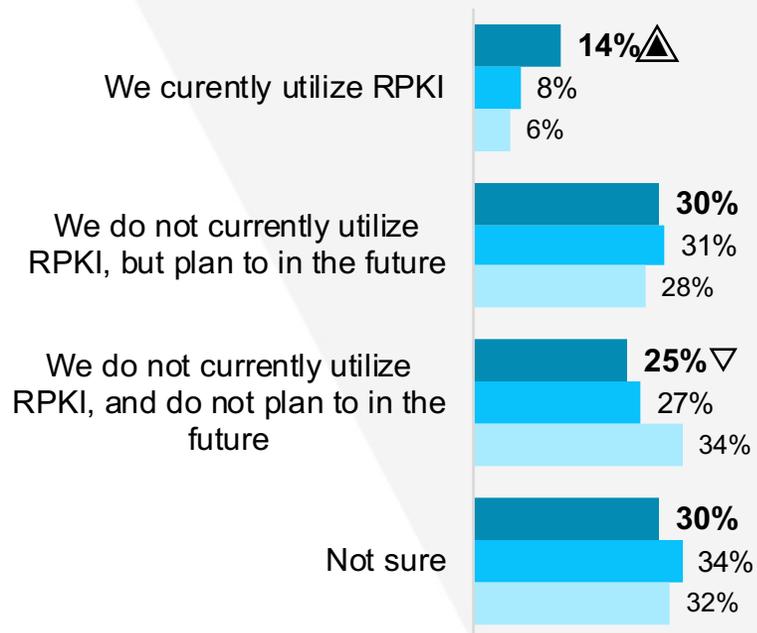


RPKI usage has increased since 2017 but is still not the norm among ARIN community members' organizations

- ISPs, organizations with less than 100 employees, and those in their profession 10 years or less are most likely to utilize RPKI in the future.
- IPv6 deployment or interest in deployment has trended downward since the baseline.

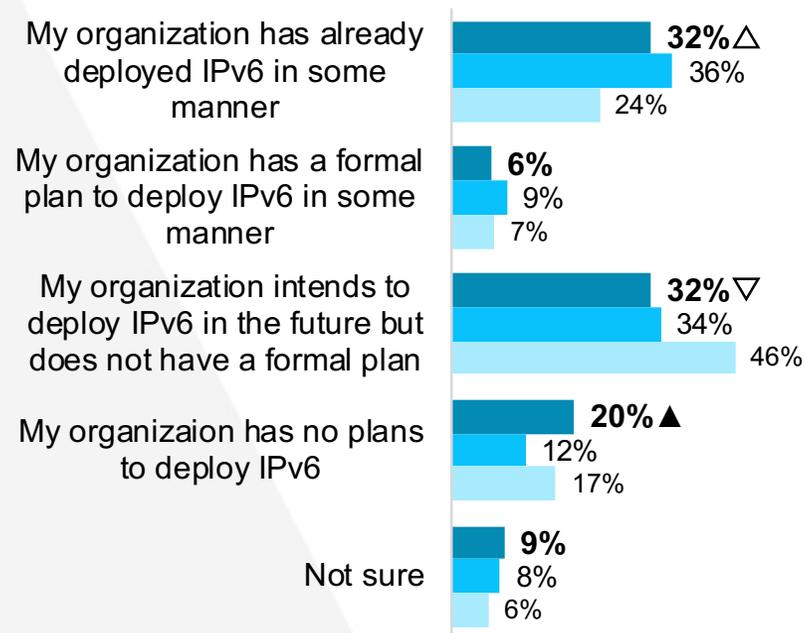
RPKI Usage

Total



IPv6 Deployment

Total



■ 2020 (n=370)
 ■ 2017 (n=247)
 ■ 2014 (n=699)

Demographics and Firmographics



Professional Characteristics

- The average years in the profession is 18 and there is an increase in those with 21 or more years.
- Network engineers make up almost half of the community members who participated in the survey.

Years in Profession			
	2020 (n=370)	2017 (n=247)	2014 (n=699)
Less than 1 year	1%	1%	0%
2 to 5 years	6%△	6%	3%
6 to 10 years	10%	12%	11%
11 to 15 years	11%▽	15%	22%
16 to 20 years	18%▽	21%	26%
21 or more years	54%▲	44%	37%
<i>Average Years in Profession</i>	18	17	17

Occupation			
	2020 (n=370)	2017 (n=247)	2014 (n=699)
Network Engineer	47%	42%	46%
Management	26%	22%	26%
Systems Administrator	15%	16%	17%
Software Coder/Developer	4%	6%	3%
Marketing/Business Development	1%	1%	1%
Attorney/Legal Services	1%	0%	1%
Other	6%▼	12%	7%



Company Characteristics

- Community members come from a wide spectrum of organization types with a decrease of Hardware/Software vendors compared to 2017.
- There is an increase in those who work for organizations with 2-24 employees.

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

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

Location of Company			
	2020 (n=370)	2017 (n=247)	2014 (n=699)
United States	86%	86%	86%
Canada	10%	9%	11%
Puerto Rico	0%	1%	0%
Other	4%	3%	2%

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