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GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION



ICANN Reputation Audit

Full Report

Prepared for ICANN by:
An **Ebiquity** Company

Robert Takacs, Executive Vice President
Jennifer Clark, Research Director



May 2013

About Echo Research

24-year track record in communication research and reputation measurement

700 staff working across 18 offices worldwide

Registered Expert Witness on image and reputation supporting Boards of leading organisations on reputation audits and insights

Research complies with the MRS Code of Conduct and ISO 9001:2008 ensuring objective and rigorous assessment

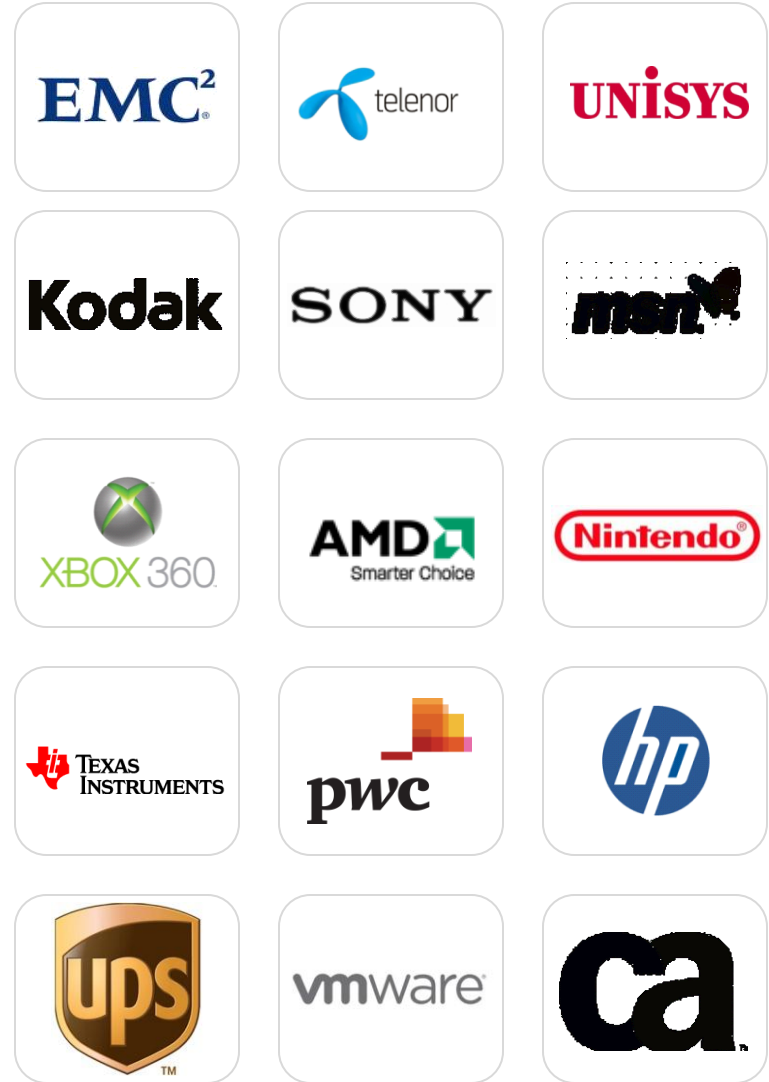


Winner of 89 industry awards for best practice in communications and reputation research



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Echo has supported 500 world-class clients including:





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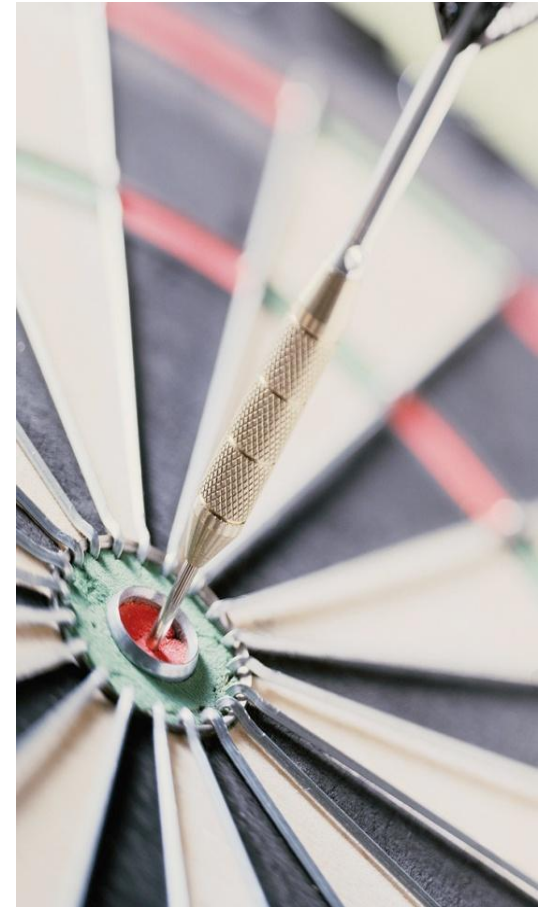
GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION

Objectives of the Reputation Audit & Methodology

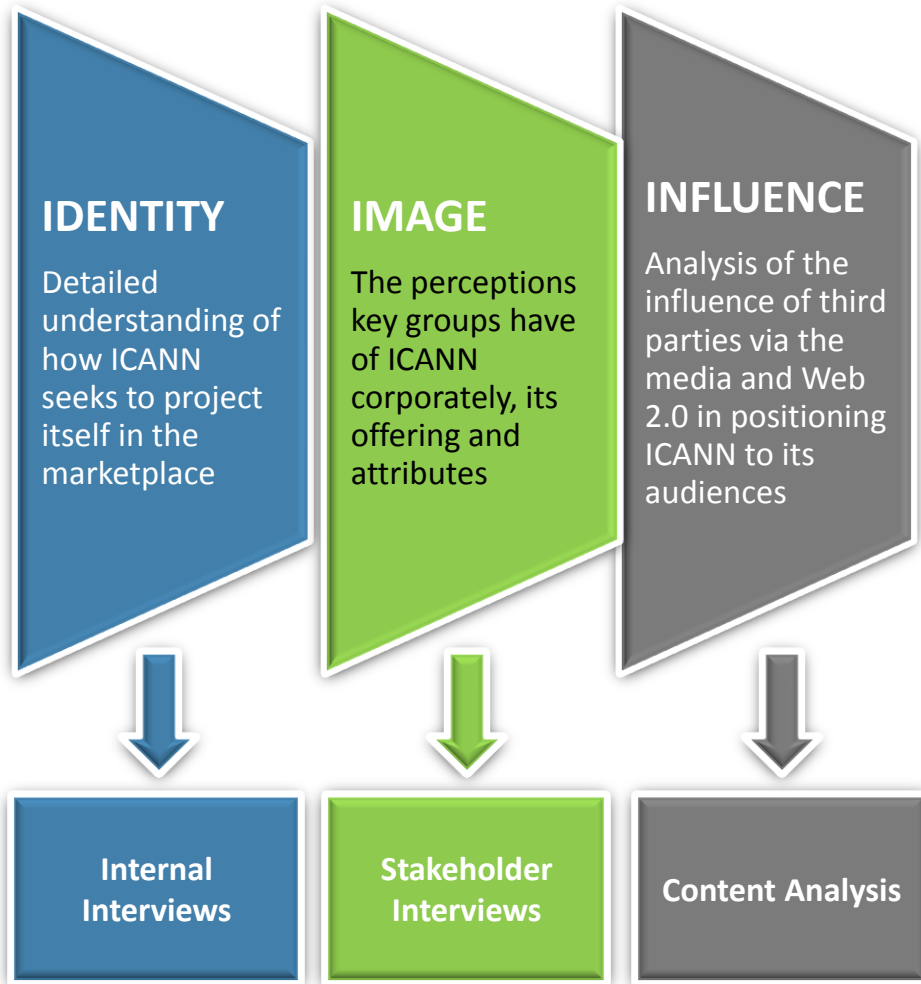


Objectives of The Reputation Audit

- To provide a deeper understanding of the **image and reputation** of ICANN including perceptions among its key stakeholders and key influencers which will usefully inform ICANN strategy priorities
- To uncover **key perceptions** with respect to ICANN's leadership, its ability to offer operational excellence and views in respect to its multi-stakeholder organisation
- To **establish baseline metrics** (KPIs) for ICANN's reputation among its key global stakeholders, as a basis for tracking progress during 2013 and beyond
- To deliver **actionable, evidence-based insights** as the basis for further enhancing ICANN's reputation in the future, through targeted stakeholder engagement and communications

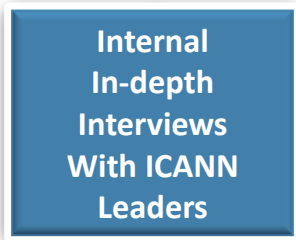
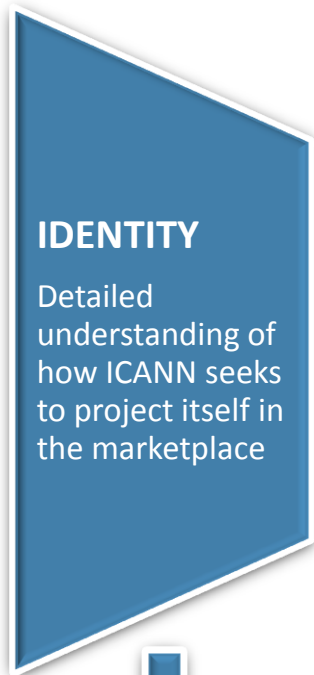


Our Reputation Audit Model



- Echo’s proven and tested model for reputation research is the **I³ (I-Cubed) methodology**. It works on the basis that the more coherent the story is both inside and outside, the more sustainable the organisation will be
- **I³** draws on comparative research findings from audiences to provide an understanding of any disconnects between the way ICANN perceives itself and the way key players outside the company perceive it
- **I³** identifies the causes of any such “Perception gaps” and provides guidance on how to better align ICANN’s **IMAGE** with its true **IDENTITY**

The IDENTITY Phase – Objectives & Methodology



Objectives:

- To explore and analyse perceptions of the organisation's **reputation and brand image**
- Provides useful insights into any 'perception gaps' between perceptions of ICANN 'within' and 'outside' the organisation as well as detailed intelligence on how to align these perceptions more effectively

Methodology:

- In-person in-depth interviews were conducted with **senior internal stakeholders** at ICANN meeting in Toronto, Canada, October 14-18, 2012; Additional interviews were conducted by telephone through November 7, 2012
- 14 interviews were conducted
- Results reported to ICANN in December, 2012 and used to develop the quantitative phase of the research



The **IMAGE** Phase – Part 1 Qualitative: Objectives & Methodology



Objective:

- Provide top-level directional insights to key reputational drivers and perceptions from among key external stakeholders

Methodology:

- In-depth telephone interviews were conducted among **stakeholders representing: government/policymakers, academics, business & commercial interests, journalists, national & international non-government and non-commercial entities and members of the technical community**
- Efforts were made to include a mix of emerging and established markets from the U.S., Europe/Near East, LatAm/ Caribbean, Africa/Middle East and APAC
- Participants were identified by ICANN and through Echo's desk research
- 26 interviews were conducted between November 19 and December 13, 2012
- Results reported to ICANN in December, 2012 and used to develop the quantitative phase of the research



The INFLUENCE Phase – Objectives & Methodology



Objective:

- An analysis of print and online media to evaluate ICANN’s image and reputation, identify third parties expressing views of ICANN and the key issues, messages and reputational drives coming through

Methodology:

- 525 items in key global markets were analysed in-depth by Echo’s expert analyst team
- Articles were analysed in their **original languages English, Chinese, Japanese, Russian, French, German and Spanish**
- Articles analysed for period from **July through November, 2012** include those with major mentions of ICANN only, defined as at least two mentions of ICANN
- Topics and messages designed in consultation with ICANN
- Favourability **assessment based on Echo’s quality rating system reflecting impact of ICANN placement, messages, spokespeople and other influencers, content and tone**
- Currently being updated for January – June, 2013



The IDENTITY Phase – Part 2 Quantitative: Methodology

Support Organisation / Advisory Committee Stakeholder Survey

IDENTITY

Detailed understanding of how ICANN seeks to project itself in the marketplace

- Online survey administered 21 February through 15 March, 2013
- Members were sent invitations to participate via email from the secretariats
- Survey was made **available in 8 languages**
- 128 completed surveys were achieved

Region	N=	Stakeholder	N=
North America	51	ALAC	18
LatAm /Caribbean	14	ccNSO	24
Europe/Near East	36	SSAC	13
APAC	19	GNSO	57
Africa/Middle East	8	GAC	5
		ASO	1
		Other	10

Part 2:
Quantitative
Surveys

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The **IMAGE** Phase – Part 2 Quantitative: Methodology

Business / Commercial Stakeholder Survey

IMAGE

The perceptions key groups have of ICANN corporately, its offering and attributes

- Telephone survey administered 21 February through 19 April, 2013
- Sampling **new gTLD applicants and non-applicants** in a mix of industries and revenue sizes
- C-suite and VP-level respondents were responsible for their company's online strategy
- Survey was available **in native language**
- 506 completed surveys were achieved

Region	N=
North America	104
LatAm / Caribbean	125
Europe/Near East	116
APAC	111
Africa/Middle East	50

**Part 2:
Quantitative
Surveys**

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TWO

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GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION

Summary of Findings



We Have Analysed Eight Strategic Reputational Drivers

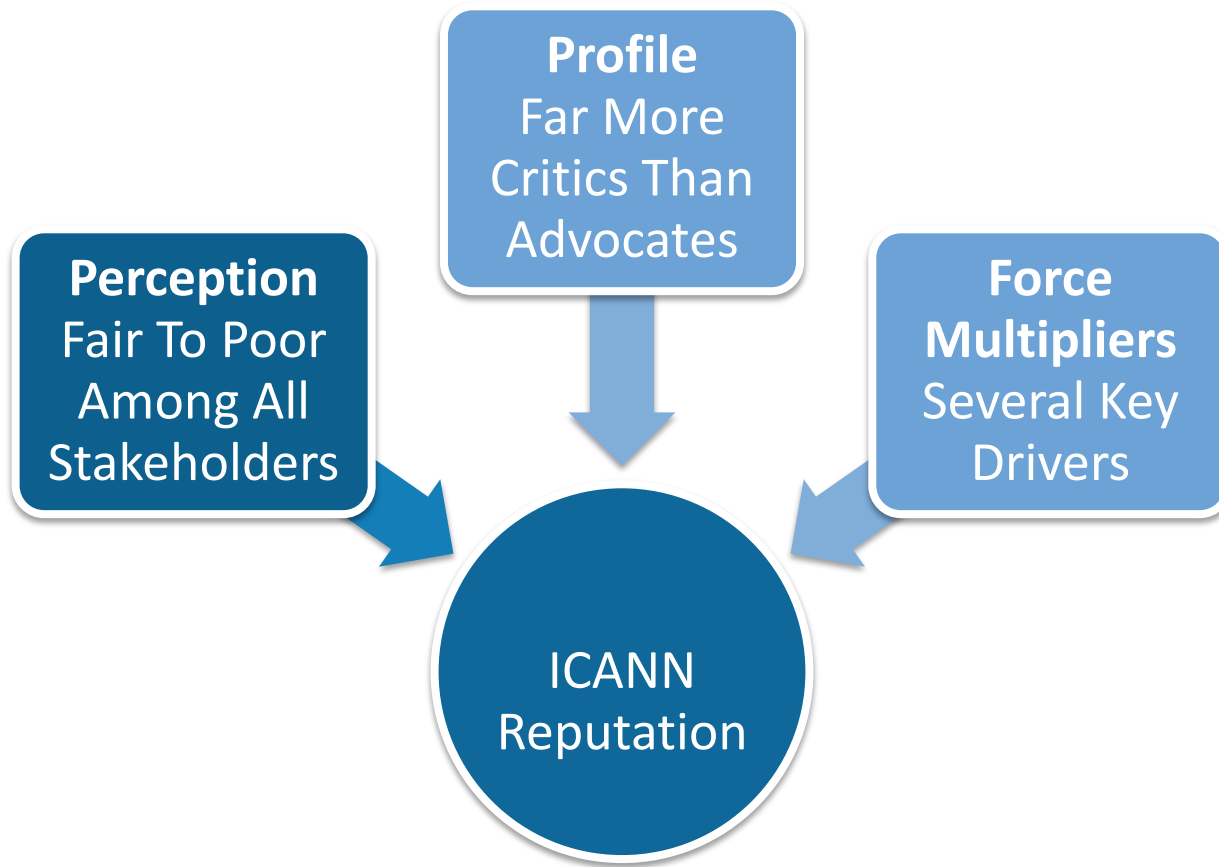


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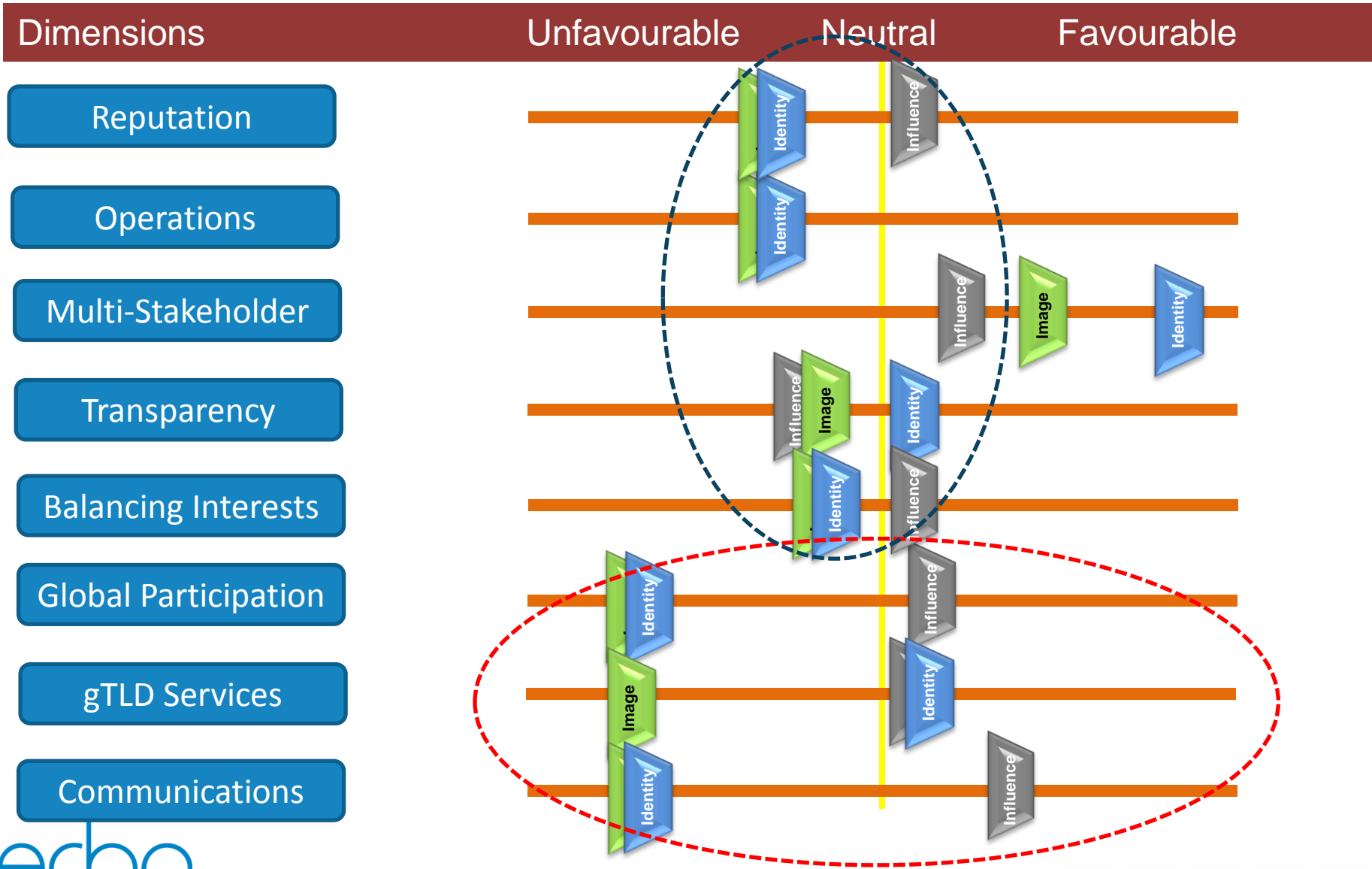


Key Reputational Findings



So The Question Is How Does ICANN Change Perceptions to “Win” More Advocates Than Critics As This Ultimately Drives Reputation

Perceptions Across Key Reputation Dimensions



Reputation Drivers By Region – SO/AC Members

	North America	LatAm / Caribbean	Europe / Near East	APAC	Africa / Middle East
Reputation	Medium	Medium	Medium	Medium	High
Advocacy	Medium	Medium	Medium	Medium	High
Operations	Low	Medium	Low	Medium	High
Multi-Stakeholder	High	High	High	Medium	High
Transparency	Low	High	Low	Medium	High
Balancing Interests	Low	Medium	Low	Low	High
Global Participation	High	Medium	High	High	High
gTLD Services	Low	High	High	Medium	High
Communications	Low	Medium	Low	Medium	High

■ Low
 ■ Medium
 ■ High



SO/AC Web Survey: *Caution, small base sizes. Directional only

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Reputation Drivers By Region – Commercial Stakeholders

	North America	LatAm / Caribbean	Europe / Near East	APAC	Africa / Middle East
Reputation	Medium	High	Medium	High	High
Advocacy	Low	Medium	Medium	Medium	Medium
Operations	Low	High	Low	High	Medium
Multi-Stakeholder	Medium	High	High	High	Medium
Transparency	Low	High	Low	High	High
Balancing Interests	Low	High	Medium	High	High
Global Participation	High	High	High	High	High
gTLD Services	Low	High	Medium	High	High
Communications	Low	Medium	Low	High	High



Commercial Stakeholder Phone Survey

■ Low
 ■ Medium
 ■ High



ICANN Super SWOT

– triangulation of Identity, Image and Influence findings

	STRENGTHS		WEAKNESSES		OPPORTUNITIES		THREATS	
I ³ : Opinions of <u>3</u> audiences	<ul style="list-style-type: none"> Multi-stakeholder model 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> Too U.S. centric External communications Lack of transparency 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> Success in handling new gTLDs Internationalisation strategy Strengthening relationships with stakeholders 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> Inability to effectively manage new gTLDs Loss of legitimacy by not engaging stakeholders globally 	<ul style="list-style-type: none"> Identity Image Influence
I ² : Opinions of <u>2</u> audiences	<ul style="list-style-type: none"> Appointment of Fadi Chehade, new Board and senior staff Effectiveness in its role in Internet governance and delivering core Internet functions Effort shown in improving participation and communications 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> Overall reputation Lack of global legitimacy Ad hoc, ineffective business operations Accessibility for developing countries Cost and necessity of new gTLDs 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> Build on the goodwill gained from Fadi's appointment Improving comms to increase participation, the level of engagement and media profile Improving the role of the GAC and its members Focusing on regional strategies 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> Lack of follow-through and implementation of promised changes Continued U.S. control 	<ul style="list-style-type: none"> Identity Image Influence
I ¹ : Opinions of <u>1</u> audience	<ul style="list-style-type: none"> Improvements in transparency and accountability Recognition as the worldwide domain name clearinghouse Commitment to One World , One Internet 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> Lack of a real understanding of the diverse needs of individual stakeholder groups Dominance of commercial interests Perception that compliance is inconsistently enforced 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> Migrating to a more professionally-run organisation 	<ul style="list-style-type: none"> Identity Image Influence 	<ul style="list-style-type: none"> External relationships (e.g., registrars) that reflect poorly on ICANN Perceptions of preferential treatment for stakeholder groups Countries supporting ITU as an alternative to ICANN 	<ul style="list-style-type: none"> Identity Image Influence



■ Identity ■ Image ■ Influence



SWOT – Internal Perceptions

Strengths

- Ensuring continued stable and secure operations of the Internet's domain name and IP addressing system
- Recognised worldwide domain name clearinghouse
- Supports a truly multi-equal stakeholder model
- Appointment of Fadi Chehadé's as President and CEO and new board and senior staff members
- Commitment to a One World, One Internet paradigm

Positive

- Strengthening relations with other NGOs and sovereign nations, e.g. India
- Improving the value that the GAC and its individual members offer to the multi-equal stakeholder framework
- Management of new gTLD programme
- Implementing transparent processes
- Migrating to a more global, professionally-run organisation
- Building on the goodwill gained from Fadi's appointment

Opportunities

INTERNAL

EXTERNAL

Weaknesses

- Perceived lack of global legitimacy
- Lack of proactive communications, especially to the at-large community
- Ad hoc approach to operations and reactionary approach to issues
- Lack of transparency in operations and decision making
- Perception that compliance is inconsistently enforced
- U.S. -centric

Threats

- Sovereign governments asserting control
- Perception of the GAC and its membership or lack thereof
- Continued perception of U.S. control
- Things do not change, lack of follow-through and implementation

Negative



SWOT – External Perceptions



INTERNAL

EXTERNAL

Strengths

- Multi-stakeholder model
- Effective in its limited role in Internet governance and delivering core Internet functions
- Recent efforts to improve global participation and communications are being lauded

Positive

- Build on the optimism gained with Fadi’s appointment
- Improve comms to increase participation and the level of engagement of current participants
- Successful roll-out of the new gTLD programme
- Focusing on regional strategies, particularly in LatAm, Africa and Asia
- Strengthening stakeholder relationships

Opportunities

Weaknesses

- U.S.-centric in its image and culture
- Lack of transparency in operations and decisions
- Ineffectiveness of its business operations
- Communications
- Accessibility for developing countries
- Lack of real understanding of diverse needs of individual stakeholder groups

Threats

- Any controversy surrounding the new gTLD roll-out
- Loss of legitimacy by not engaging stakeholders globally, particularly governments who are currently not participating in ICANN
- Concerns that ICANN is not truly operating as a multi-stakeholder organisation
- External relationships that have the potential to reflect poorly on ICANN
- Maintaining status-quo, lack of follow-through and implementation of changes

Negative



SWOT – Media Influence

	Positive	Opportunities	
INTERNAL	<ul style="list-style-type: none">• Multi-stakeholder model• ICANN leadership, especially Fadi Chehadé• Corporate communications – although underused• Transparent and accountable (myICANN and WHOIS directory review)• Corporate strategies	<ul style="list-style-type: none">• Increased external communications will result in an improved media profile• CircleID: establish beneficial relations• Internationalization strategy to reinforce worldwide representation• gTLDs can add brand value if the process is managed fairly and effectively	
			EXTERNAL
	Weaknesses		Threats
	<ul style="list-style-type: none">• Regarded as US and Western oriented• ICANN board ethics• Communication with external stakeholders• Presence in African and Middle Eastern media• Trademark protection insufficient• Necessity and cost of gTLD process• Ability to placate various cultural groups and Governments with domain name objections	<ul style="list-style-type: none">• Countries such as Russia and China supporting ITU or UN as alternatives to ICANN• Alternative DNS roots, championed by Louis Pouzin, ex-Internet Society• Future ability to effectively manage the vast number of proposed gTLDs	
	Negative		



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THREE

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Key Drivers for Improving ICANN's Reputation and Advocacy by Stakeholders

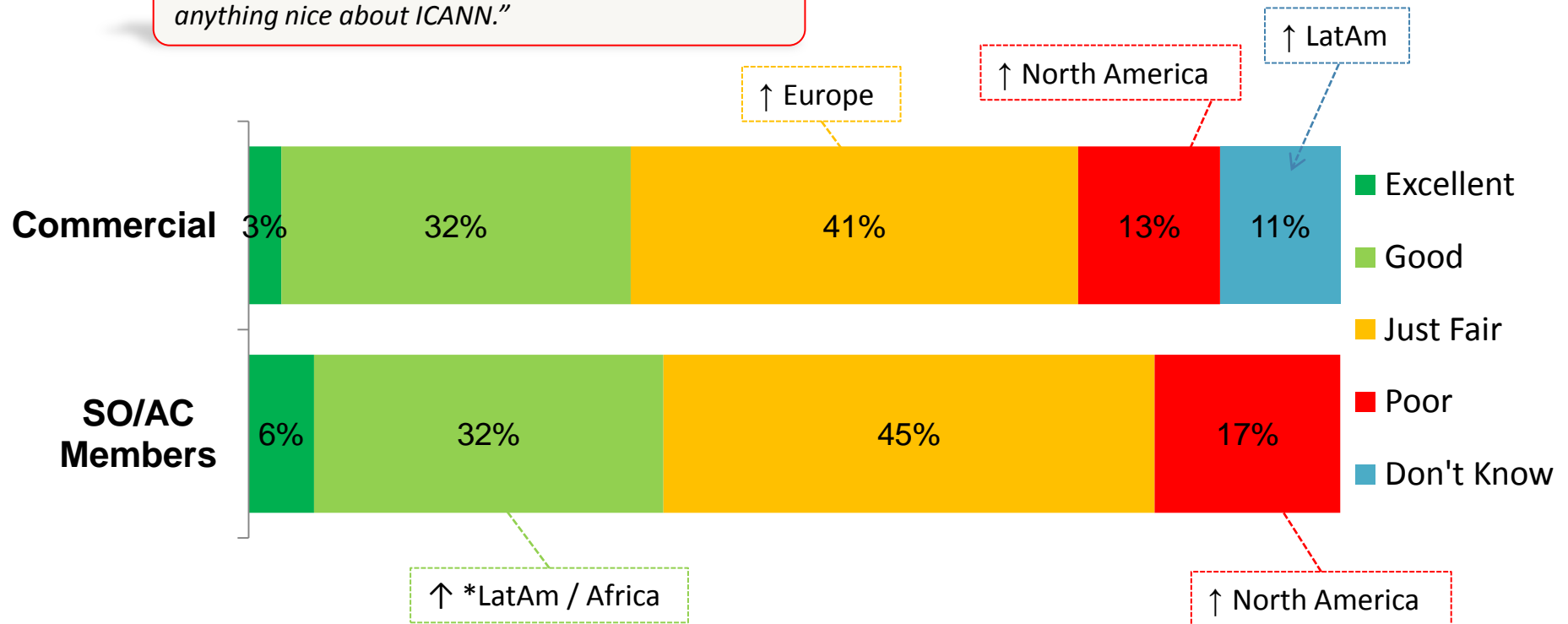


ICANN's Overall Corporate Reputation is Fair to Poor Among SO/AC Members and Commercial Stakeholders

"Among end-users who know us, I think [ICANN's reputation] is positive."

"ICANN suffers from perceptions based on failures of the past – you lose trust easily and it takes a long time to rebuild."

"In some regions, it is almost heretical to say anything nice about ICANN."

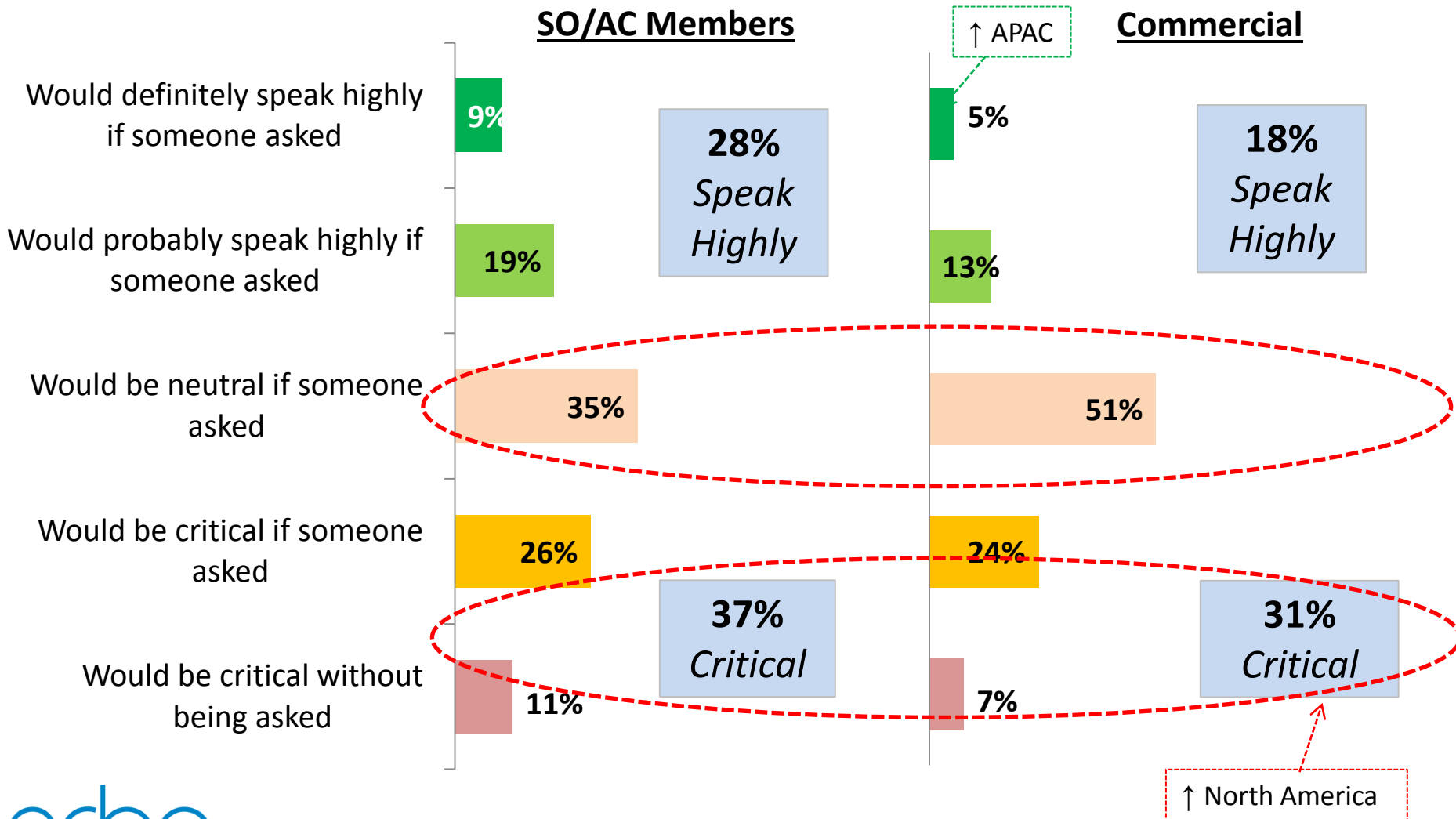


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SO/AC Web Survey n=128 (*Caution, small base size. Directional only.)
Commercial Telephone Survey Respondents Familiar with ICANN n=287



SO/AC Members and Commercial Stakeholders More Likely To Be Critics Than Advocates for ICANN However There Are Many Undecideds



SO/AC Web Survey n=128

Commercial Telephone Survey (Total Answering does not include 'Not at all familiar'/DK) n=267

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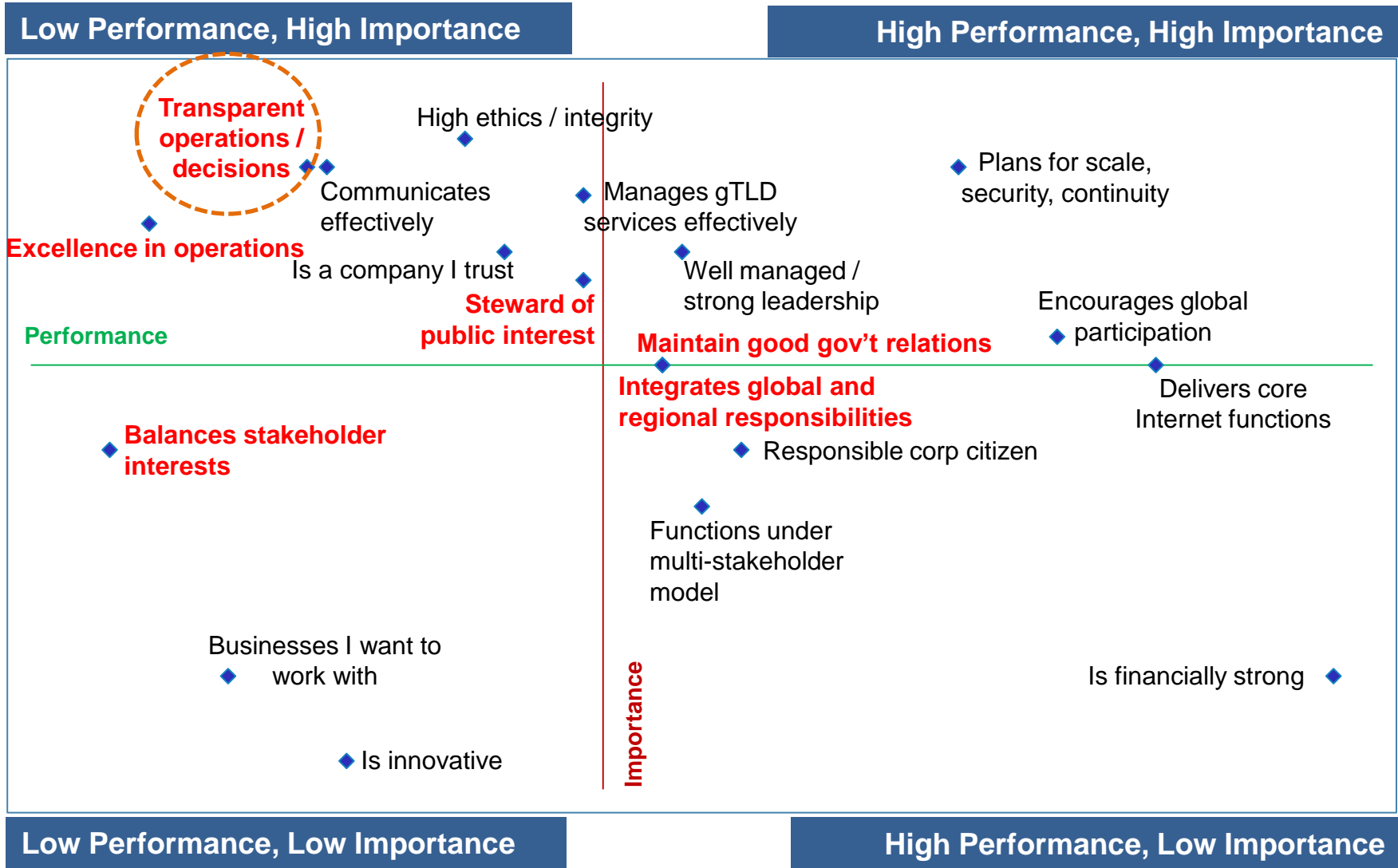
Attributes Analysed to Determine Key Drivers Impacting ICANN's Reputation and Advocacy Among SO/AC Members and Commercial Stakeholders

- Rated 19 attributes by respondents on importance and on ICANN's performance
- Attributes mapped to determine how ICANN performs in areas relative to their importance
- Key driver analysis conducted via regression to identify those attributes that correlate most with reputation and advocacy
- Increased ICANN performance on key driver attributes leads to a more positive perception of ICANN's reputation and an increased likelihood for stakeholder to be an advocate

1. Is **innovative**
2. Functions under a **multi-equal stakeholder** model
3. Delivers **core Internet** functions
4. Is the kind of company that **businesses want to work with**
5. Acts as a **steward** of the public interest
6. Is a company I **trust**
7. Is well **managed / has strong leadership**
8. Is **financially strong**
9. Is a responsible **corporate citizen**
10. **Excellence** in all its operations
11. Has the highest standards of **ethics and integrity**
12. Is **transparent** in its operations and decision making
13. Encourages **global participation**
14. Maintains **good governmental relations**
15. **Communicates effectively** with stakeholders
16. Integrates **global and regional** responsibilities
17. Plans for scale, **security and continuity**
18. Manages **gTLD services** effectively
19. **Balances** stakeholder interests equally



Importance vs. Performance on Attributes Among SO/AC Members



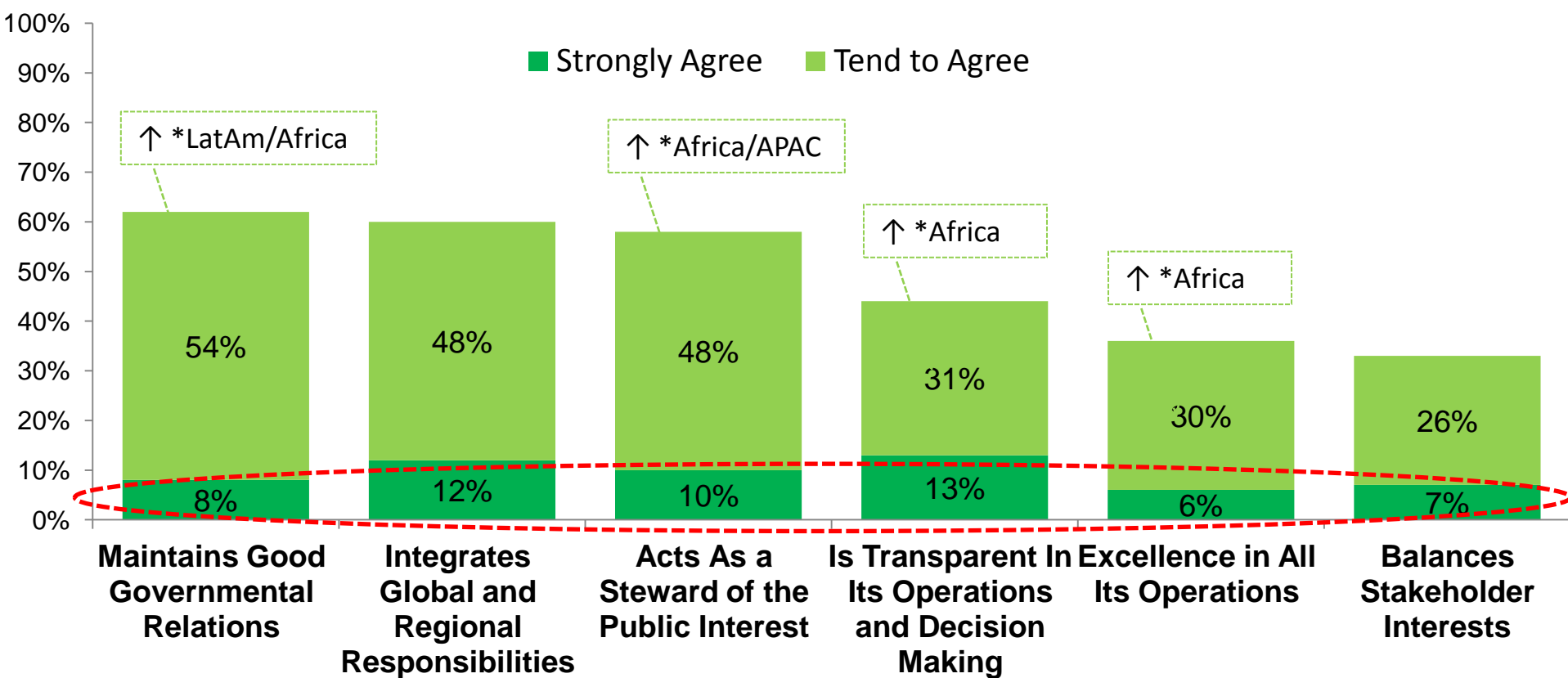
Red = Key Drivers for Reputation and Advocacy
SO/AC Web Survey n=128

Low = Below Average
High = Above Average



ICANN's Internal Advocacy and Reputation Perception Is Underpinned By Six Key Force Multipliers

Improved Performance Leads To Improved Advocacy and Improved Reputation
Amongst SO/AC Members

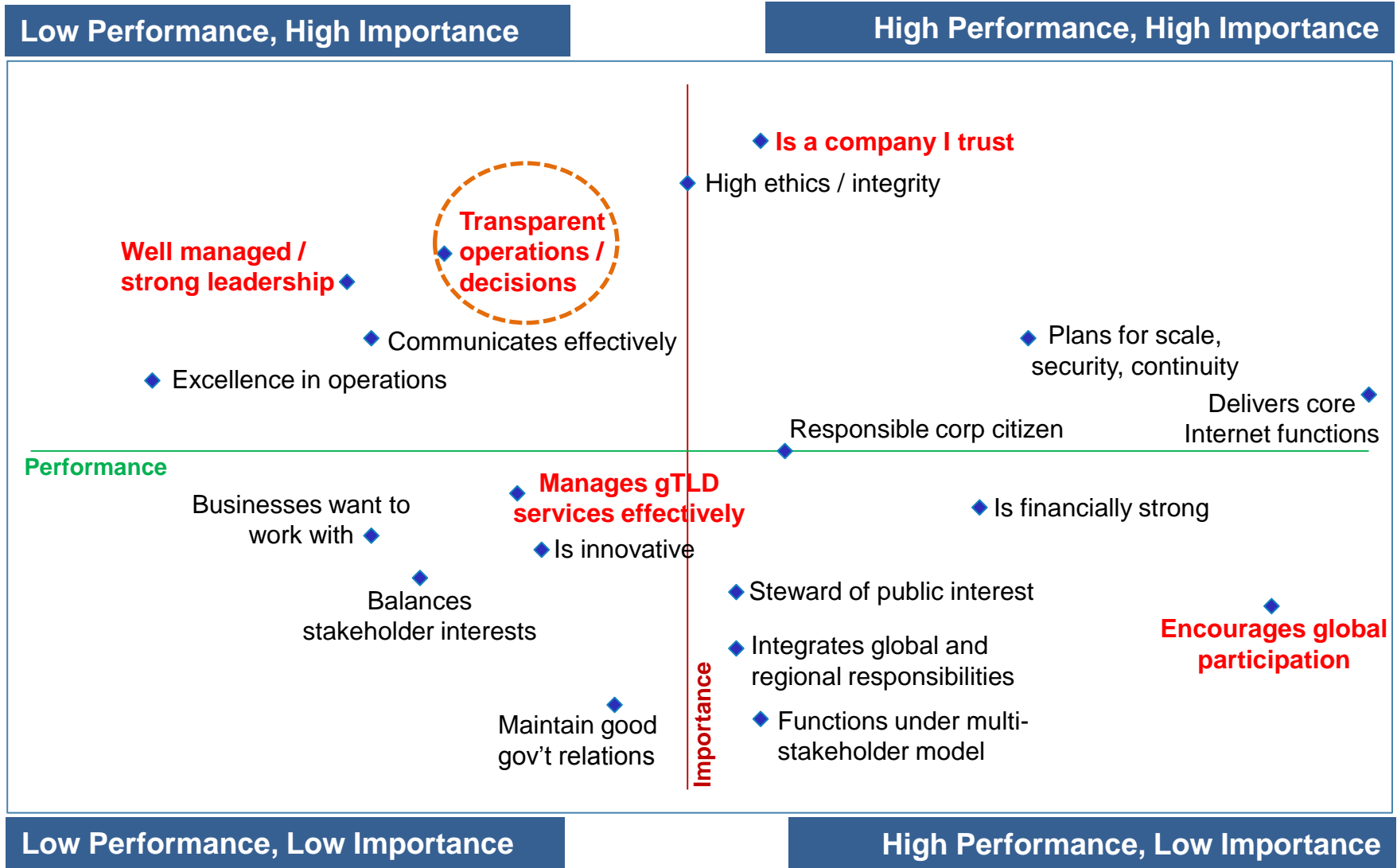


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SO/AC Web Survey n=128 (*Caution, small base size. Directional only.)



Importance vs. Performance on Attributes Among Commercial Stakeholders



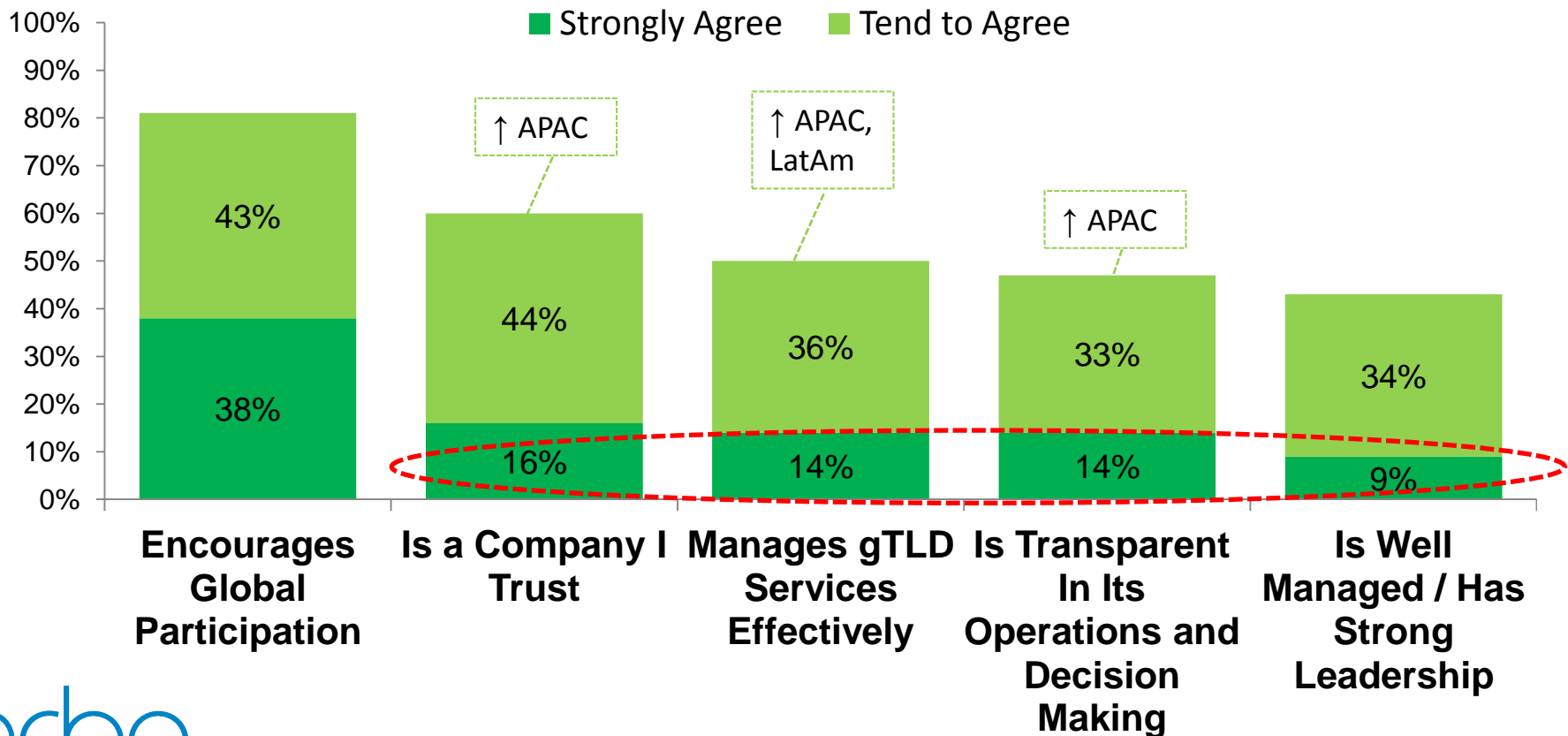
Red = Key Drivers for Reputation and Advocacy
Commercial Telephone Survey n=506

Low = Below Average
High = Above Average



ICANN's Commercial Stakeholder Advocacy and Reputation Perception Is Underpinned By Five Force Multipliers

Improved Performance Leads To Improved Advocacy and Improved Reputation Amongst Commercial Stakeholders



Commercial Telephone Survey Total Answering Among Those Familiar Bases Vary



In Addition To the Key Force Multipliers, We Have Identified Several Regional Messaging Attributes For Commercial Stakeholders

These Are Other Attributes Likely To Increase Advocacy and Improve Reputation Amongst Commercial Stakeholders

North America

- Communicates effectively with stakeholders

LatAm/Caribbean

- Plans for scale, security and continuity

Europe/Near East

- Is innovative

Africa/Middle East

- Has the highest standards of ethics and integrity

APAC

- Functions under a multi-equal stakeholder model



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FOUR

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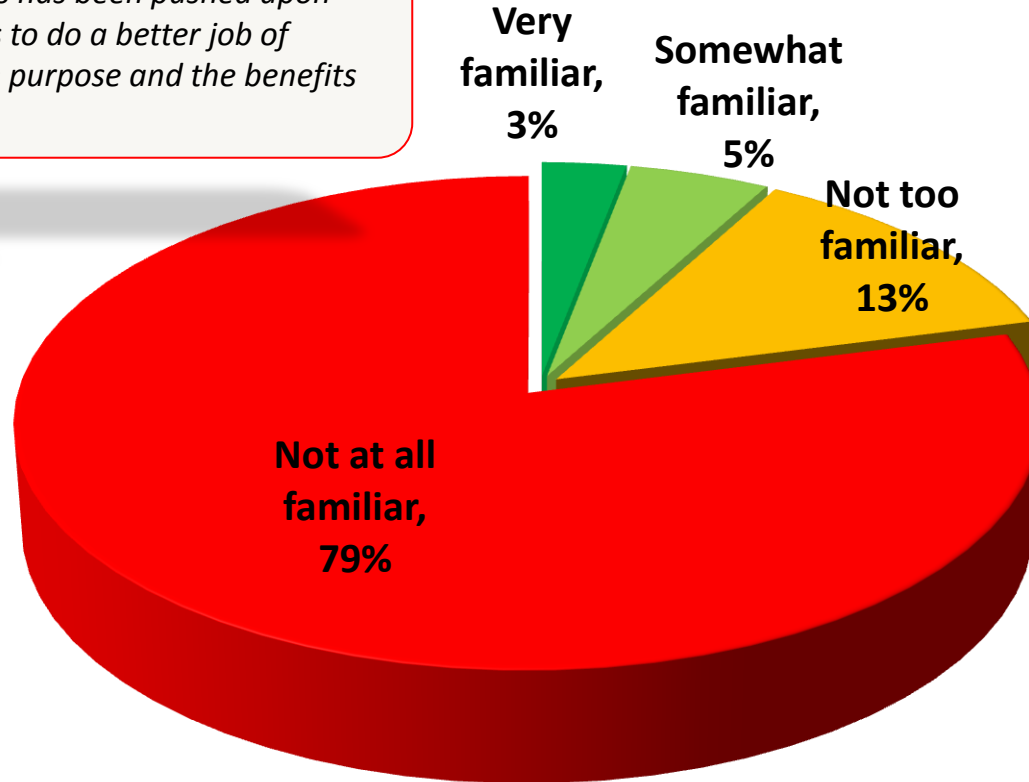
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Stakeholders' View of the New gTLD Programme



Vast Majority of Businesses Who Have Not Applied for a New gTLD Are Not Familiar With the New gTLD Programme

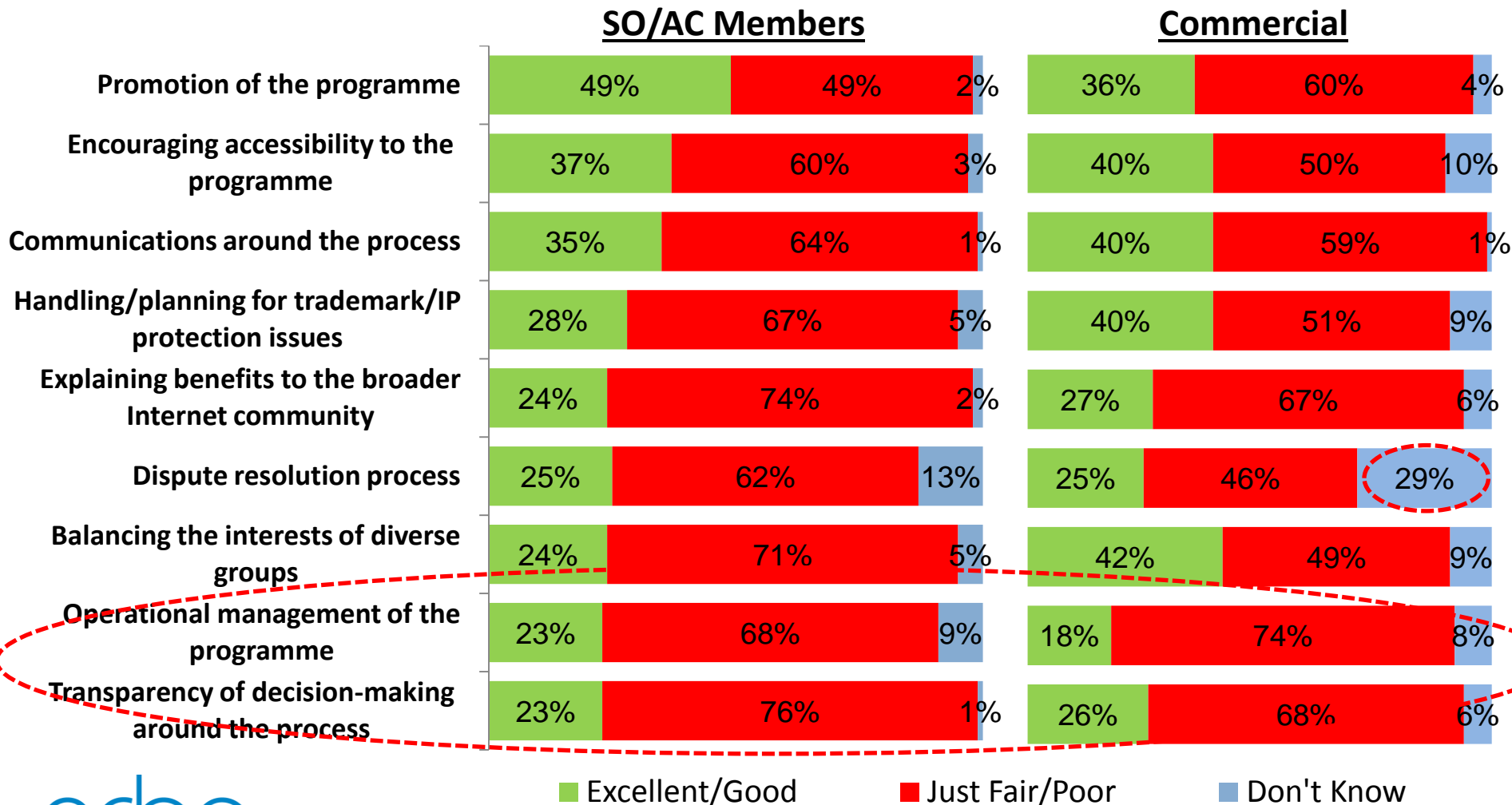
“Many feel that this has been pushed upon them. ICANN needs to do a better job of communicating the purpose and the benefits of the gTLDs.”



“There is too much complexity in the process - it is an insiders’ game.”



ICANN Manages Promotion of the New gTLD Programme Relatively Well, However Requires Improvements on Management, Transparency and Explaining the Benefits to the Broader Community



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SO/AC Web Survey n=128 / Commercial Telephone Survey Familiar with Program n=210





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Implications for ICANN



We Believe ICANN Should Focus on The Following Three Strategic Priorities

Winning Advocates

- Align comms to force multipliers to capture and develop advocates; potentially migrate critics
- Control image and reputation

Engaging Stakeholders

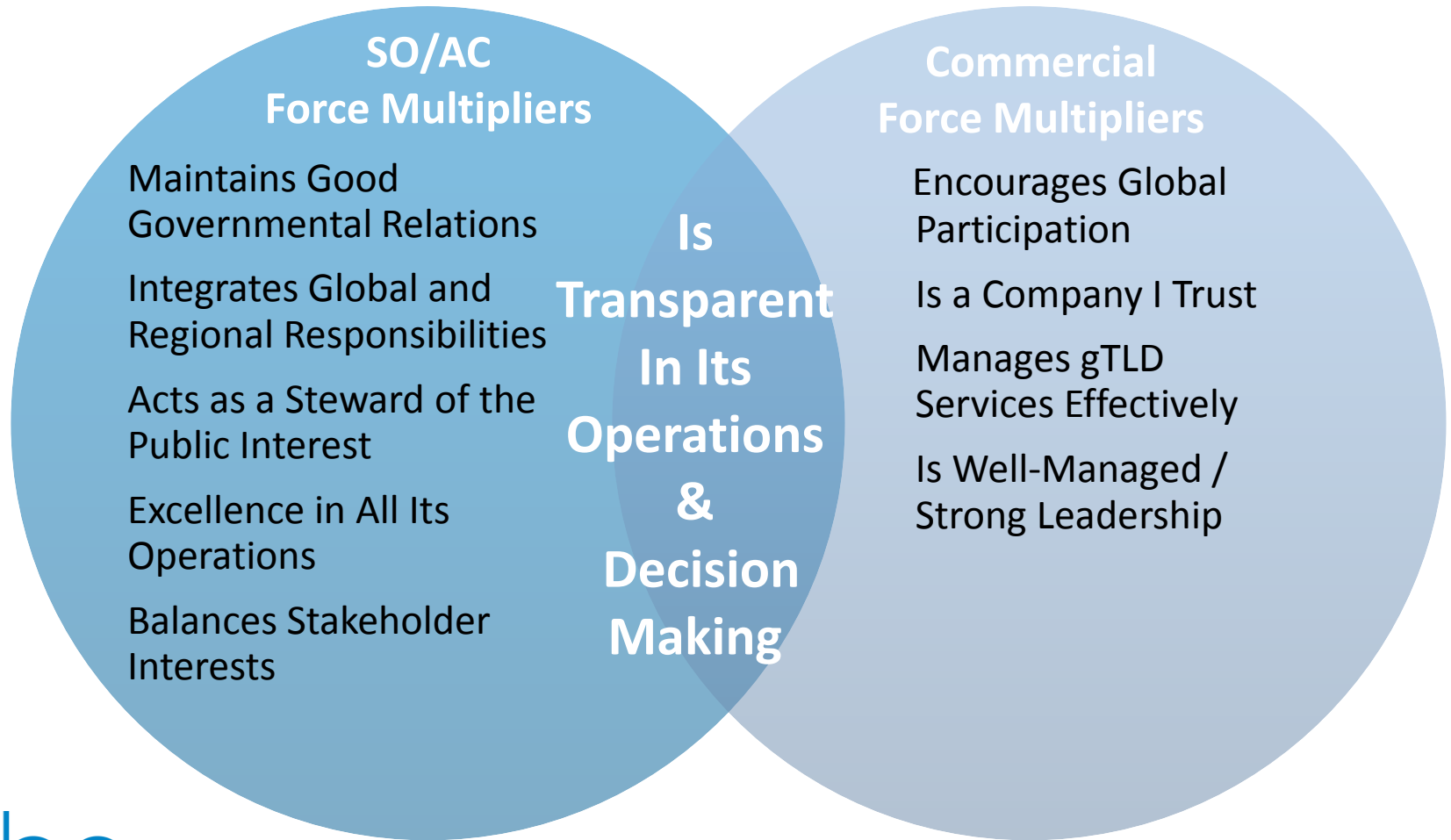
- Continue regional outreach outside of the Western countries
- Cultivate relationships with governments globally – especially those who are not currently participants

Driving Operational Excellence

- “Coming of age”
- Focus on transparency



Winning Advocates - Align Comms to Force Multipliers - Transparency Provides a Common Communications Linkage



Winning Advocates - Set Comms Tempo to Control and Manage ICANN's Reputation

Creating Dialogue

- Go beyond one-way information disseminating
- Provide feedback whenever possible to those who provide comment
- Stakeholders see the value and importance of the ICANN meetings, find ways to open up the meetings in order to allow more to participate

Managing Reputation

- Increase corporate communications to take control of ICANN's reputation in the media, especially during the new gTLD process
- Proactive outreach to journalists to ensure consistent and accurate portrayal of ICANN, its policies and its programmes (i.e., new gTLDs)



Engaging Stakeholders – Increase Outreach and Familiarity With ICANN

Building Awareness

- Promote stable and secure Internet operations - highlighting successes of becoming the worldwide domain name clearinghouse
- Establish a process by which Board Members become Ambassadors for ICANN, explaining its purpose and mission rationale to stakeholders

Advancing Multi-Stakeholder Model

- Promote what it means to have a “bottom-up” approach to policy development where everyone has a voice in the process

Involving Commercial Stakeholders

- Gain a better understanding of their needs / concerns – continue Roundtables, etc.
- Areas of immediate focus should include new gTLDs, security/privacy issues, trademark/IP infringement



Engaging Stakeholders – Promote Globalisation, Strengthen Government Relations and Continue Developing Regional Strategies

Fostering Global Engagement

- Continue outreach efforts, especially those targeted to less-developed countries
- Engage governments in a culturally appropriate manner
- Invest in translating all communications

Driving GAC Role Clarity

- Clearly identify the roles and responsibility of both parties to all stakeholders
- Continue to focus on engagement with GAC members and potential members

Supporting Regional Strategies

- Conduct outreach efforts to understand local issues, include businesses, universities, NGOs and other local stakeholders
- Provide localised content and increase number of fellowships available; here participation is low



Emphasizing Excellence – Demonstrate and Communicate Leadership and Transparency

Promoting Operational Leadership

- Ensure goals which Fadi promised improvement at the start of his tenure as CEO are delivered
- Migrate to a more process-run organisation
- Formalise the operational structure
- Simplify the dissemination of information to maintain transparency without inundating stakeholders with overload

Emphasizing Transparency

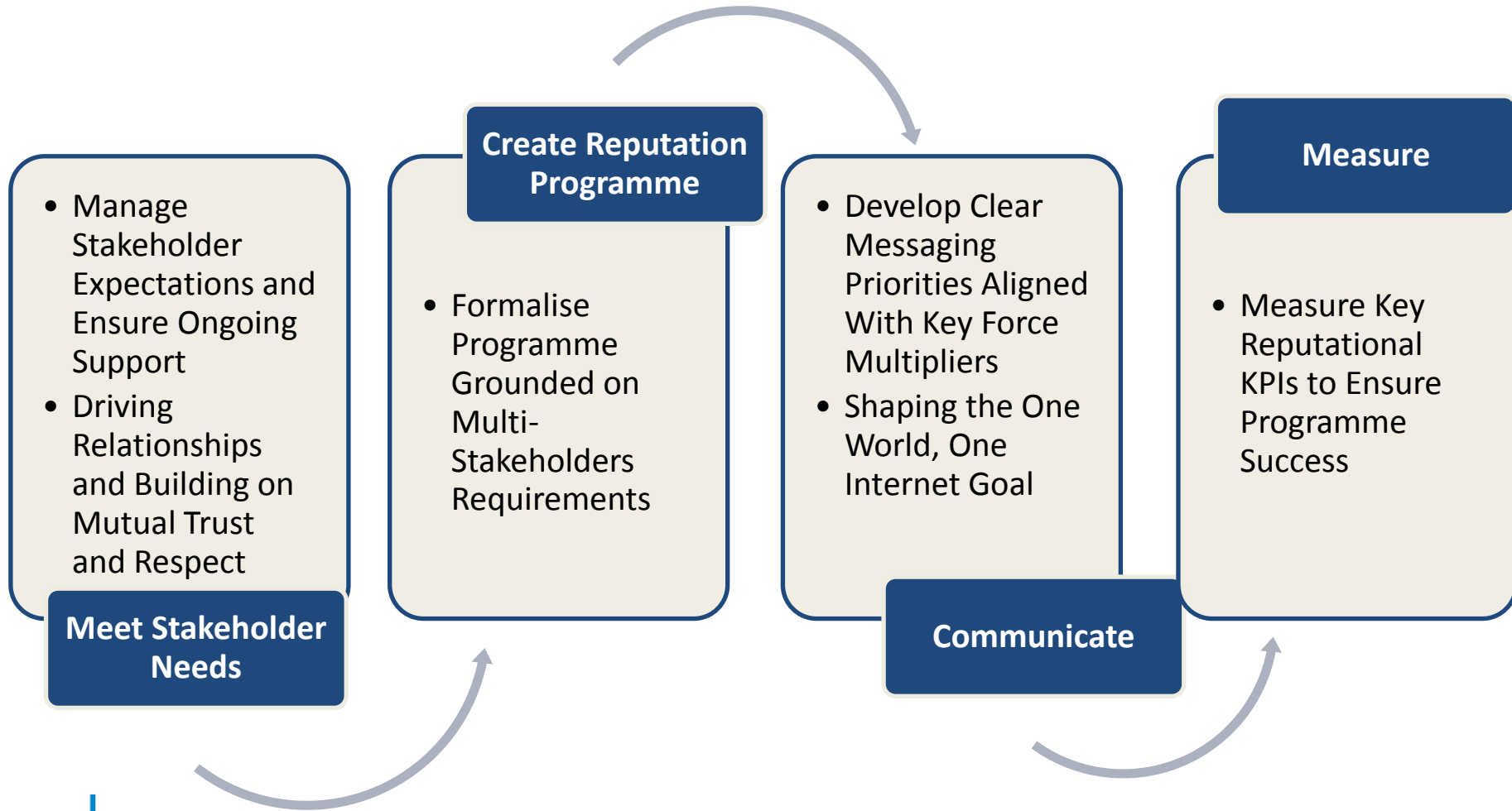
- Ensure that the new gTLD process is transparent in perception as well as in practice as this is the area where ICANN is currently in the spotlight
- Provide comms not only promoting new gTLDs, but also explaining how organisations can navigate the process and protect themselves

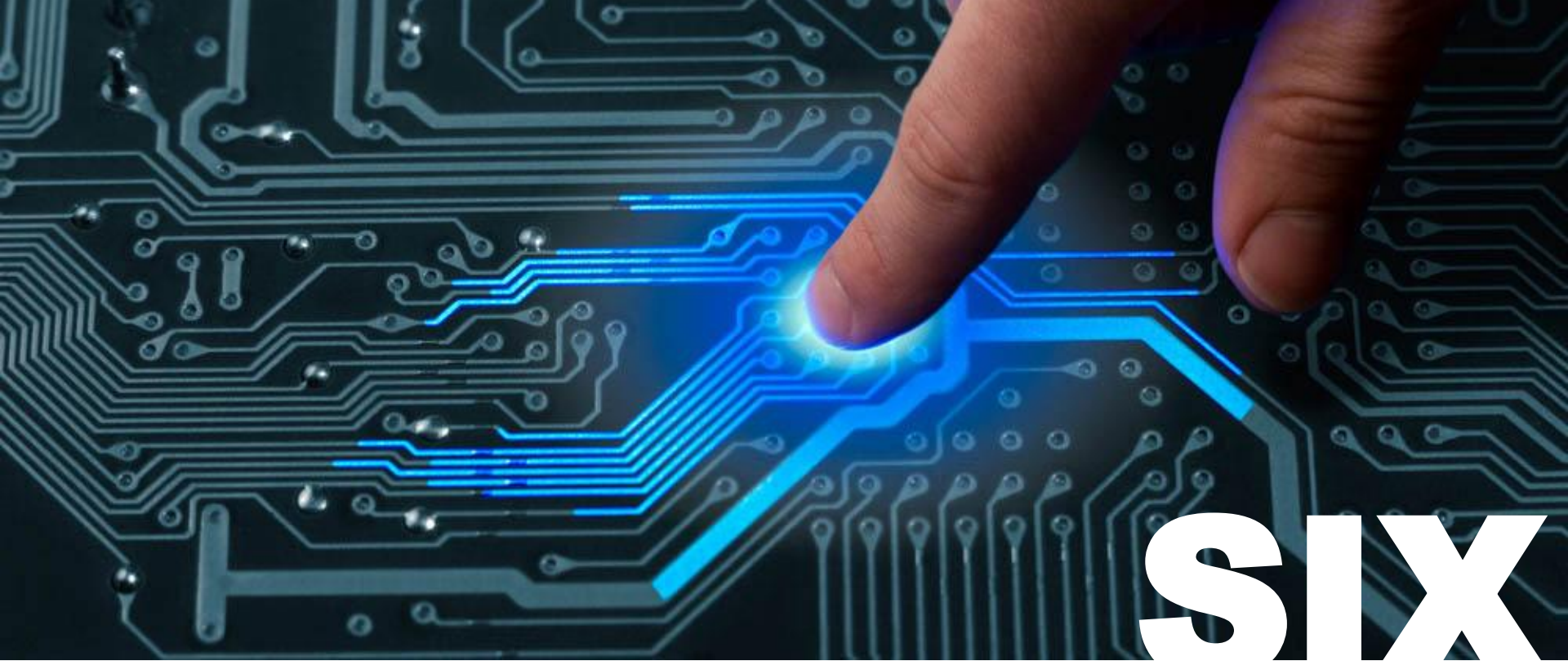


Defining Role Clarity

- Develop a media/press kit to present a consistent story
- Frequent, communications around the organisation’s goals and its jurisdiction – what it can and cannot do
- Messages should be tailored to the audience so that even “Average Internet User” understands why ICANN and its programmes are important

Pathway to Reputational Excellence





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Appendix A – Additional Quantitative Results



ICANN's Stakeholder Engagement

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The logo for Echo, featuring the word "echo" in a lowercase, blue, sans-serif font. The letters are thin and modern, with a slight gap between the 'e' and 'c'.

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Familiarity With ICANN Is Low Among Commercial Stakeholders

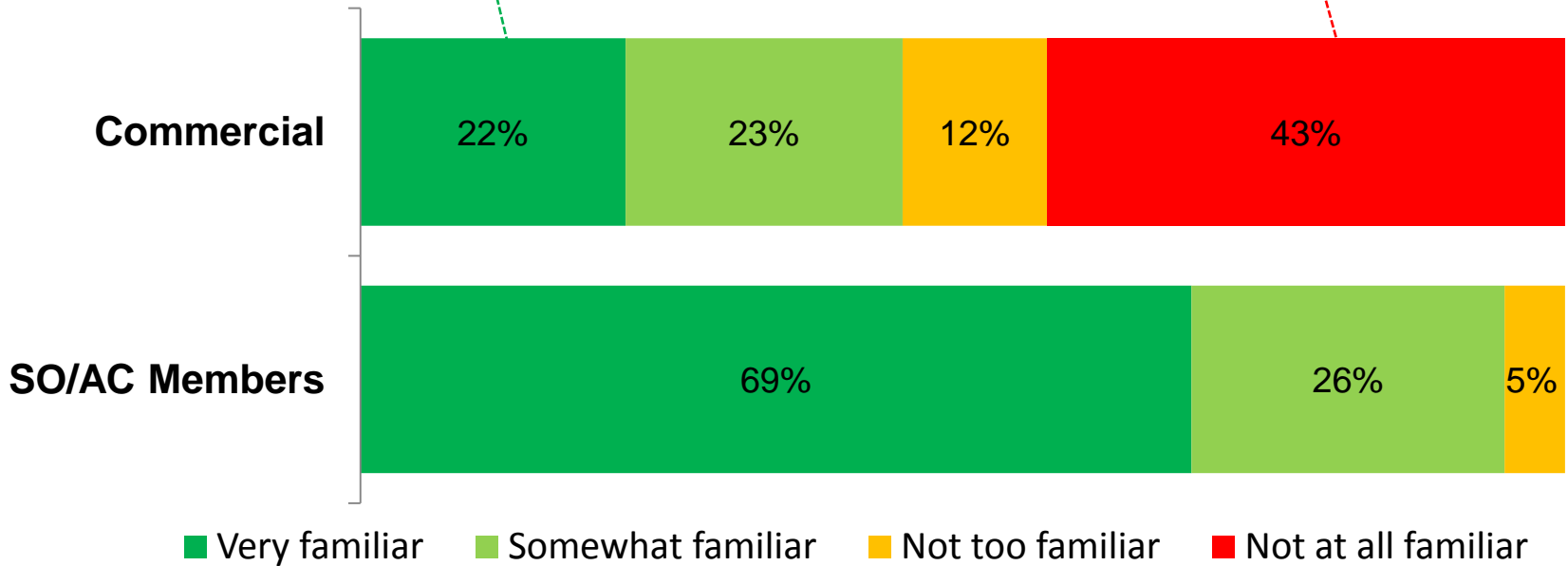
"There's a lack of understanding of how ICANN works and how to engage with the organisation."

"I still struggle to explain what is ICANN. It is not an organisation, not the staff, not the Board, but all who participate, the overall community."

"ICANN is completely incapable of communicating with the public of what it does or how end-users can make their voices heard to impact policy."

↑ North America

↑ Africa, LatAm

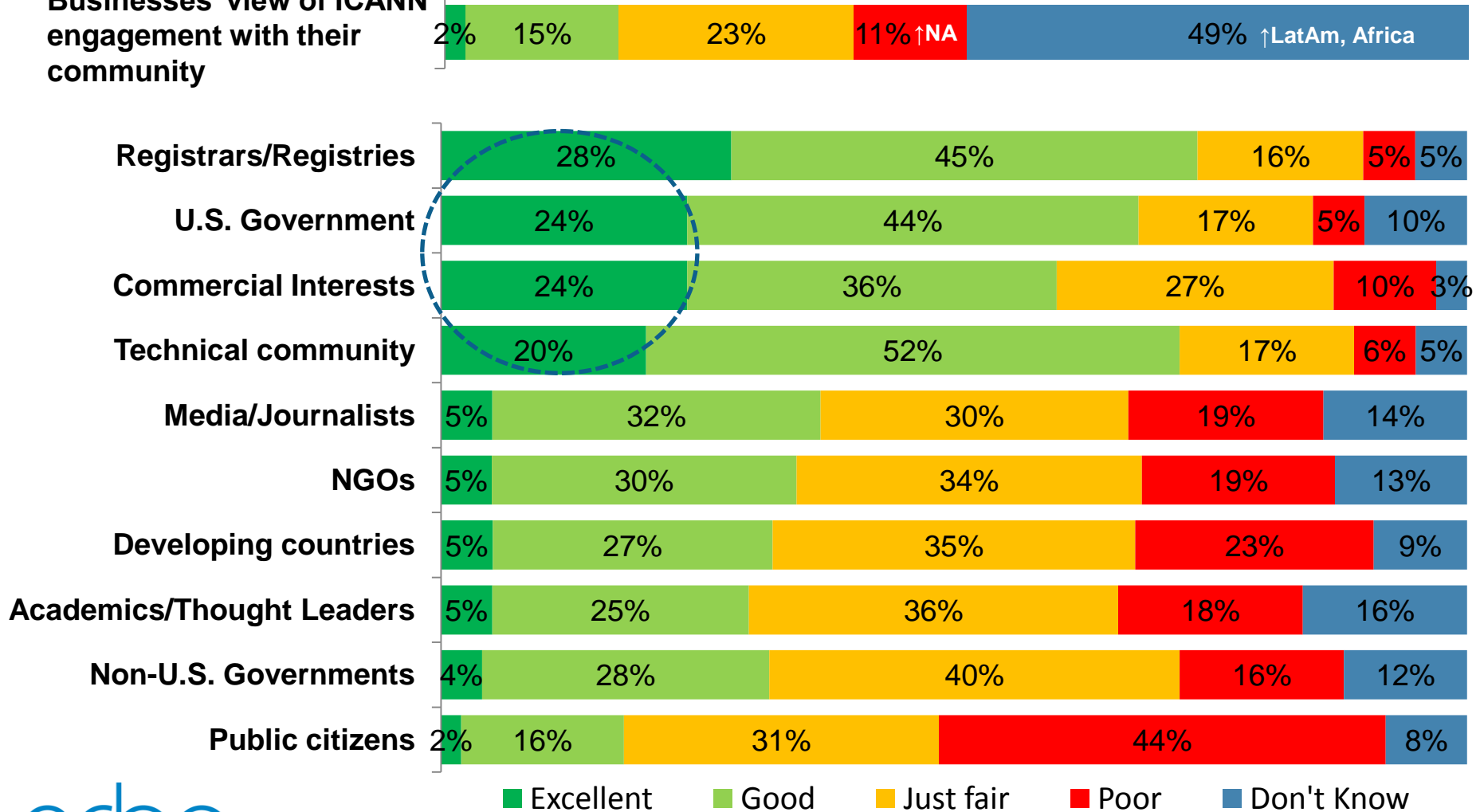


SO/AC Web Survey n=128
Commercial Telephone Survey n=506



According To SO/AC, ICANN's Engagement Is Strongest With Registrars/Registries, Other Commercial Interests and The U.S. Gov't; Engagement With Public Lacking

Businesses' view of ICANN engagement with their community



SO/AC Web Survey n=128
Commercial Telephone Survey n=506

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ICANN Has Room To Improve Upon its Understanding of the Needs of Individual Stakeholder Groups - Business Constituency Is Unsure

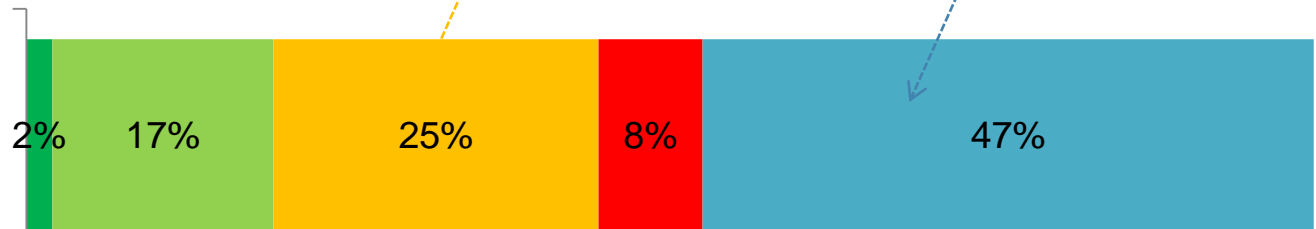
"Interests are not perfectly balanced, everyone's needs are so different, but they try and are continuing to move in a better direction with this."

↑ North America

↑ LatAm, Africa

Commercial

ICANN's understanding of the diverse needs of the business community



SO/AC Members

ICANN's understanding of the diverse needs of its individual stakeholder groups



■ Excellent ■ Good ■ Just fair ■ Poor ■ Don't Know



SO/AC Web Survey n=128
Commercial Telephone Survey n=506



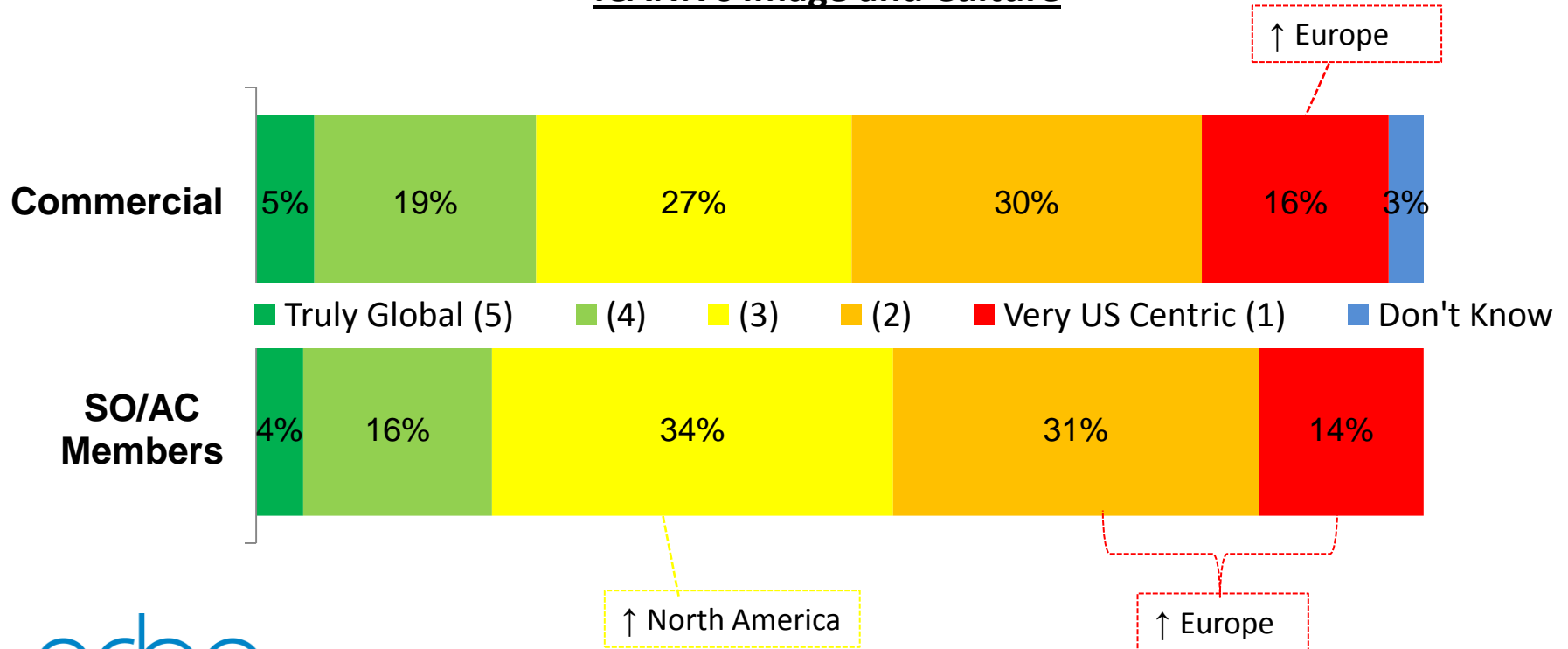
Few Stakeholders View ICANN's Image and Culture as Truly Global

"ICANN is a U.S. organisation. We need to consider other countries and cultures, not just the U.S."

"ICANN cannot truly serve the global Internet community if decisions are under U.S. control."

"All of their business constituencies are from the U.S. or global – there is no regional representation."

ICANN's Image and Culture



SO/AC Web Survey n=128
Commercial Telephone Survey Very/Somewhat Familiar n=227



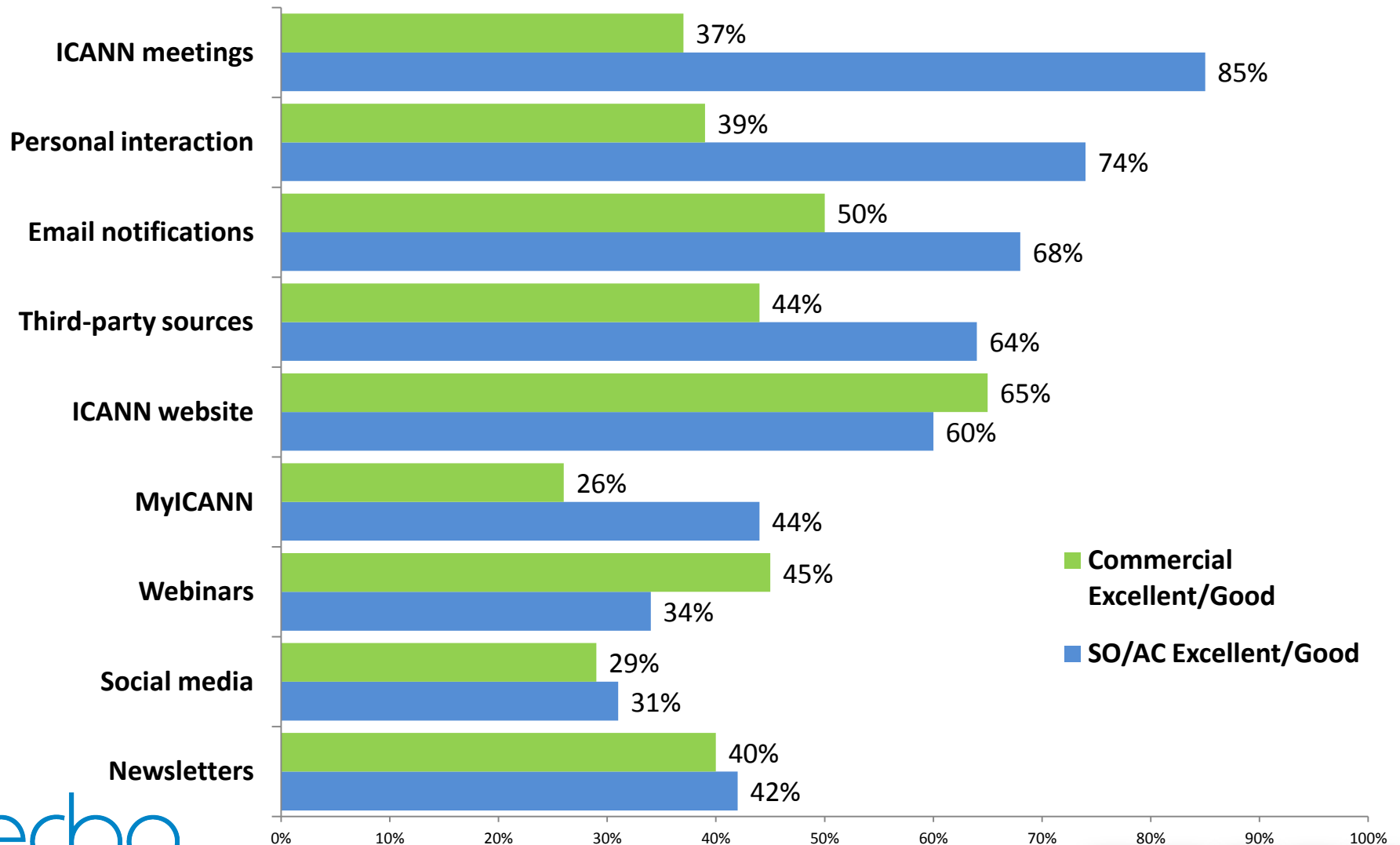
Value of ICANN's Communications

An **Ebiquity** Company

The logo for Echo, featuring the word "echo" in a lowercase, blue, sans-serif font. The letters are thin and modern, with a slight gap between the 'e' and 'c'.

GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION

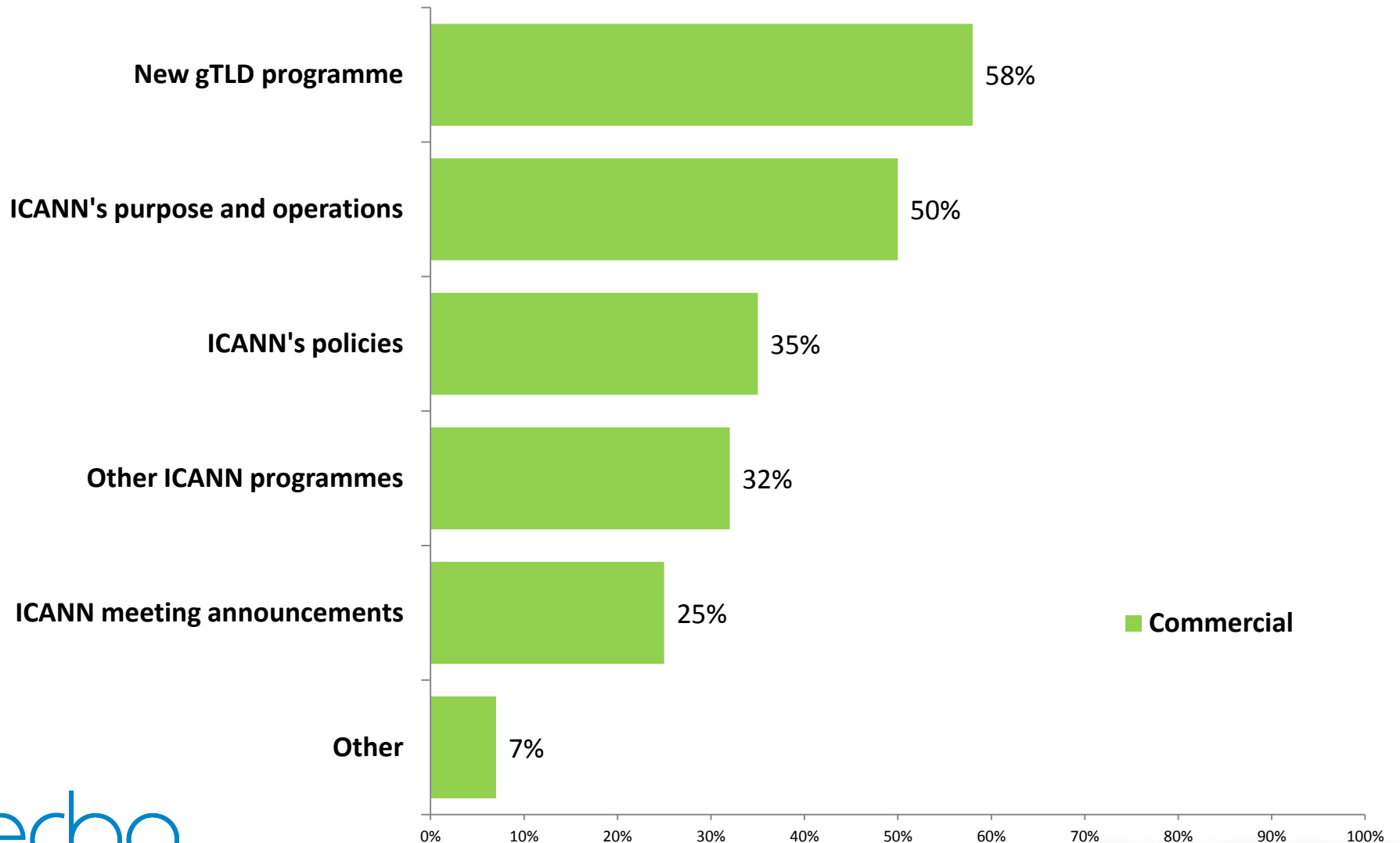
SO/AC Members Find Direct Contact Most Valuable ICANN Comms, Commercial Prefer Indirect Contact



SO/AC Web Survey n=128 Commercial Telephone Survey n=506



Commercial Stakeholders Interested in Receiving More Information About ICANN's Purpose and Operations as Well as the New gTLD Programme

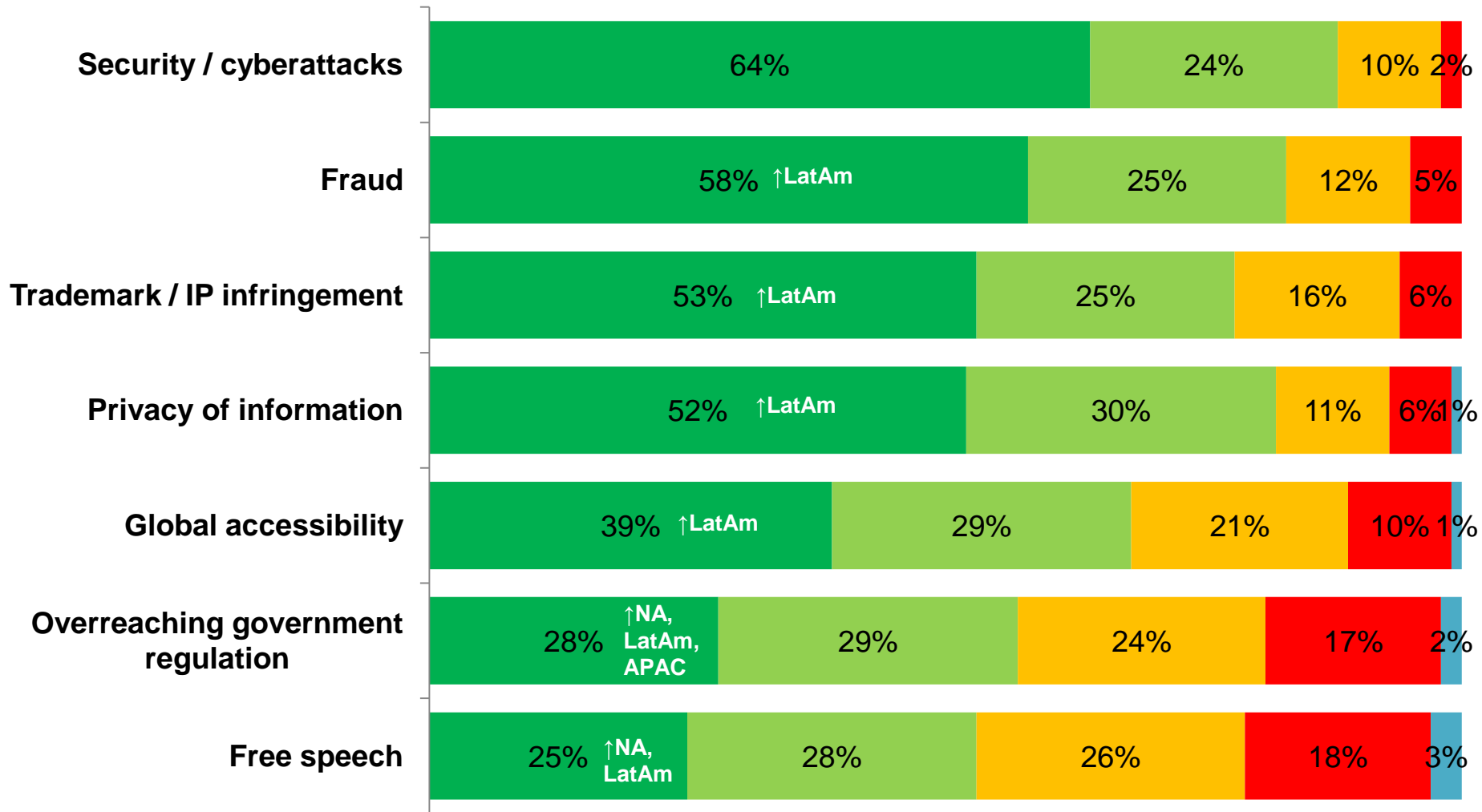


Commercial Telephone Survey n=506

An Ebiqity Company



Security and Privacy Issues Weigh Heavily In Determining Strategy For a Company's Online Presence



■ Very concerned
 ■ Fairly concerned
 ■ Not too concerned
 ■ Not at all concerned
 ■ Don't Know

Commercial Telephone Survey n=506



SO/AC Feedback

An **Ebiquity** Company

The logo for Echo, featuring the word "echo" in a lowercase, blue, sans-serif font. The letters are thin and modern, with a slight gap between the 'e' and 'c'.

GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION

SO/AC Members Generally See the Current ICANN Structure As Effective

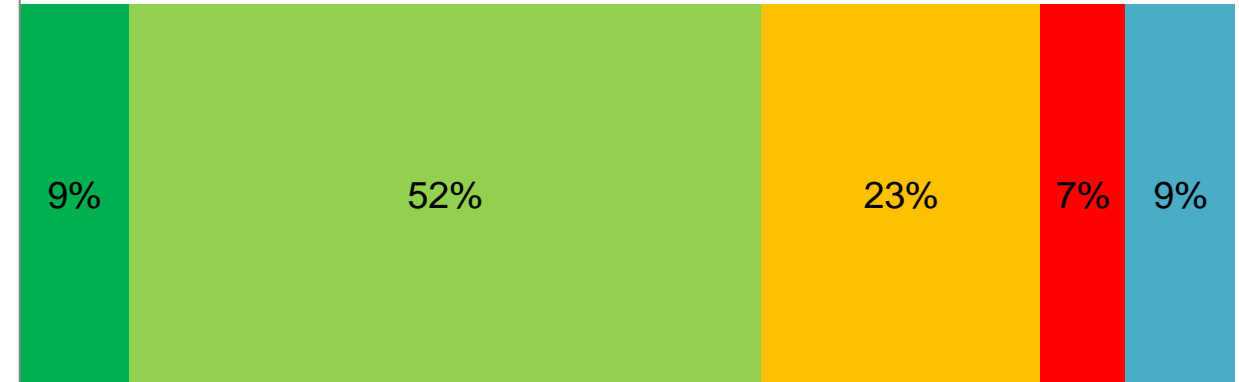
"The structure provides for bottom-up, horizontal input. On it rests ICANN's legitimacy."

"ICANN's actions and decisions seem to come out of left field or completely support the registry/registrar agenda."

61%
Effective

30%
Ineffective

Effectiveness of SO/AC Structure



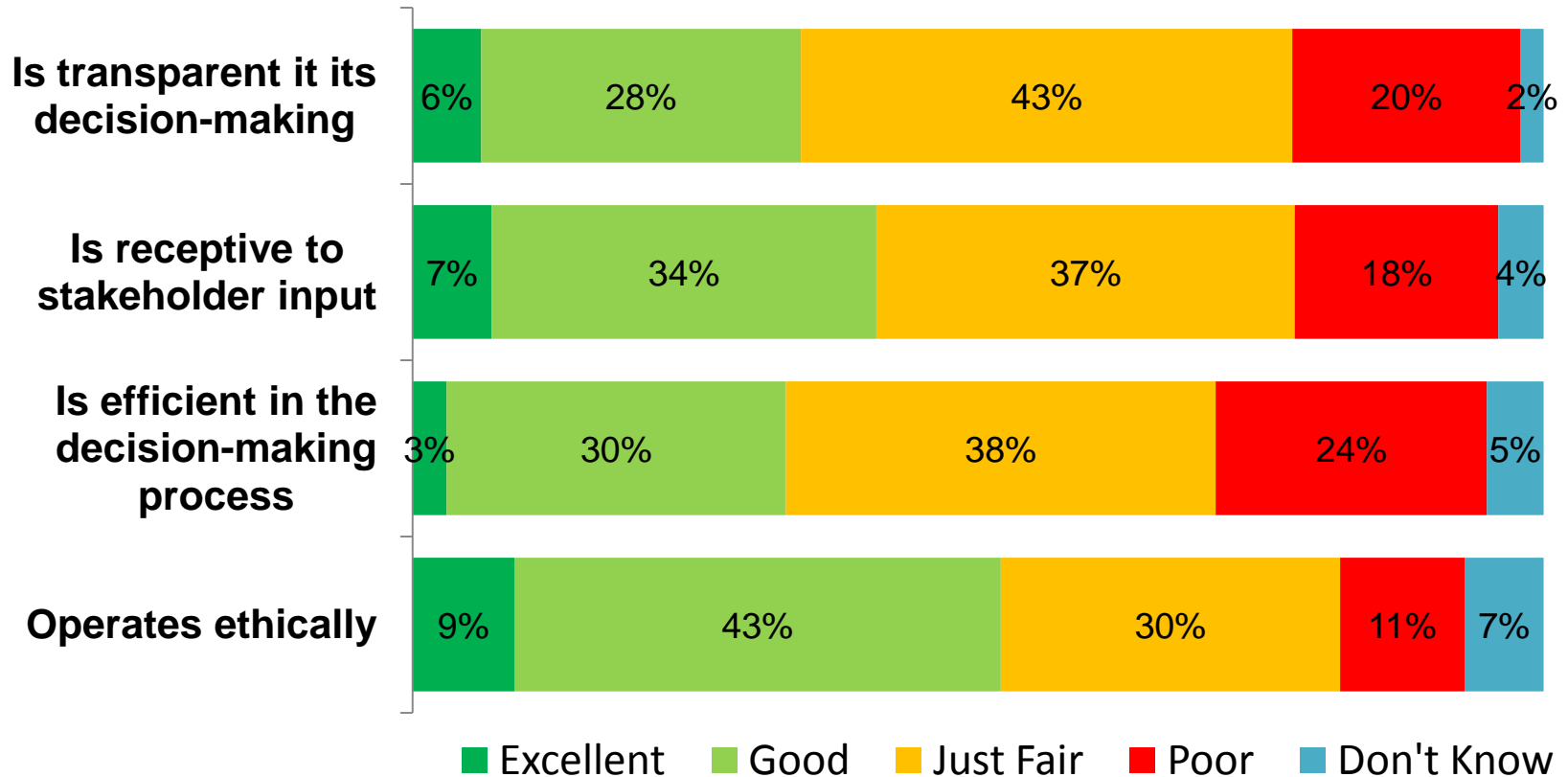
- Very Effective
- Fairly Effective
- Fairly Ineffective
- Very Ineffective
- Don't Know



SO/AC Web Survey n=128



SO/AC Members See ICANN Board as Underperforming In Areas Related To Its Decision-Making Process



SO/AC See Some Success in Attempts To Develop Regional Strategies; Most Outside The U.S. believe ICANN Cannot Operate Effectively On a Global Level Because of U.S. Laws

ICANN is successful in developing regional strategies to address the specific needs faced in different parts of the world.



Functioning under U.S. laws hinders ICANN's ability to effectively operate globally.



The ITU is a viable alternative for countries to support instead of ICANN.



■ Strongly Agree
 ■ Tend to Agree
 ■ Tend to Disagree
 ■ Strongly Disagree
 ■ Don't Know



SO/AC Web Survey n=128





echo

GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION

Appendix B – Media Analysis Results

July – November 2012



The INFLUENCE Phase – Measuring Tonality, Echo Rating

Designed to answer not only the question of **WAS** it favourable, but **HOW** favourable was it?

Volume of coverage = quantity

The number of times:

1. An issue appears.
2. A publication covers the subject.
3. Spokespeople appear.
4. Competitors are mentioned.

Rating of articles = quality

Used to assess the impact of coverage on the readership.

Rating is determined by:

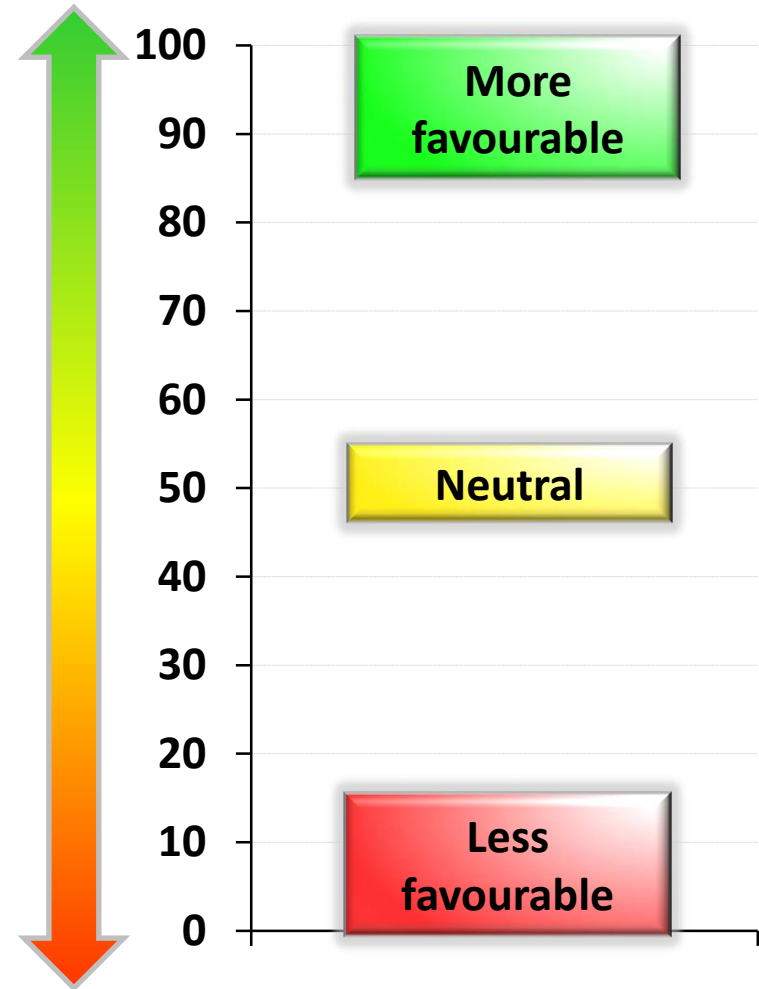
CONTENT / TONE

- Messages
- Spokespeople
- Use of Sources

Together with.....

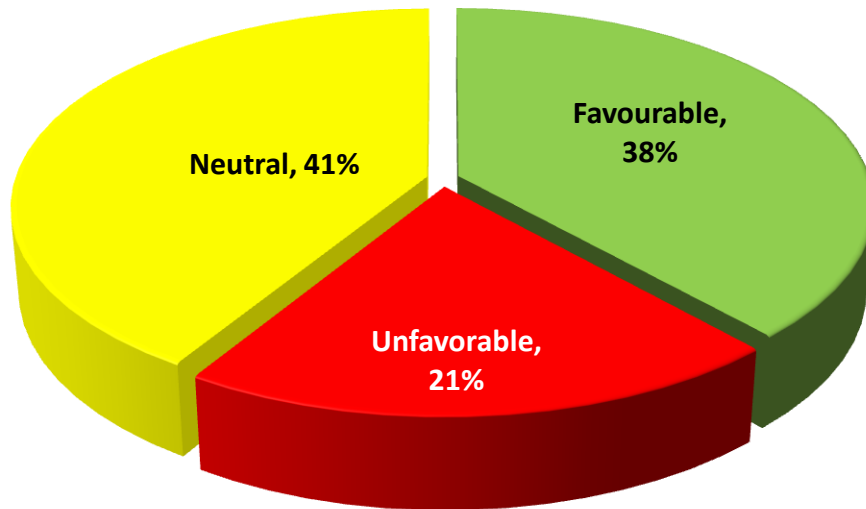
FORM

- Headline
- Visuals
- Prominence
- Placement
- Size



ICANN Generated a Mix of Favourable and Neutral Coverage, With gTLDs Driving the Majority of Negative Coverage

Media Favourability



Volume: 525

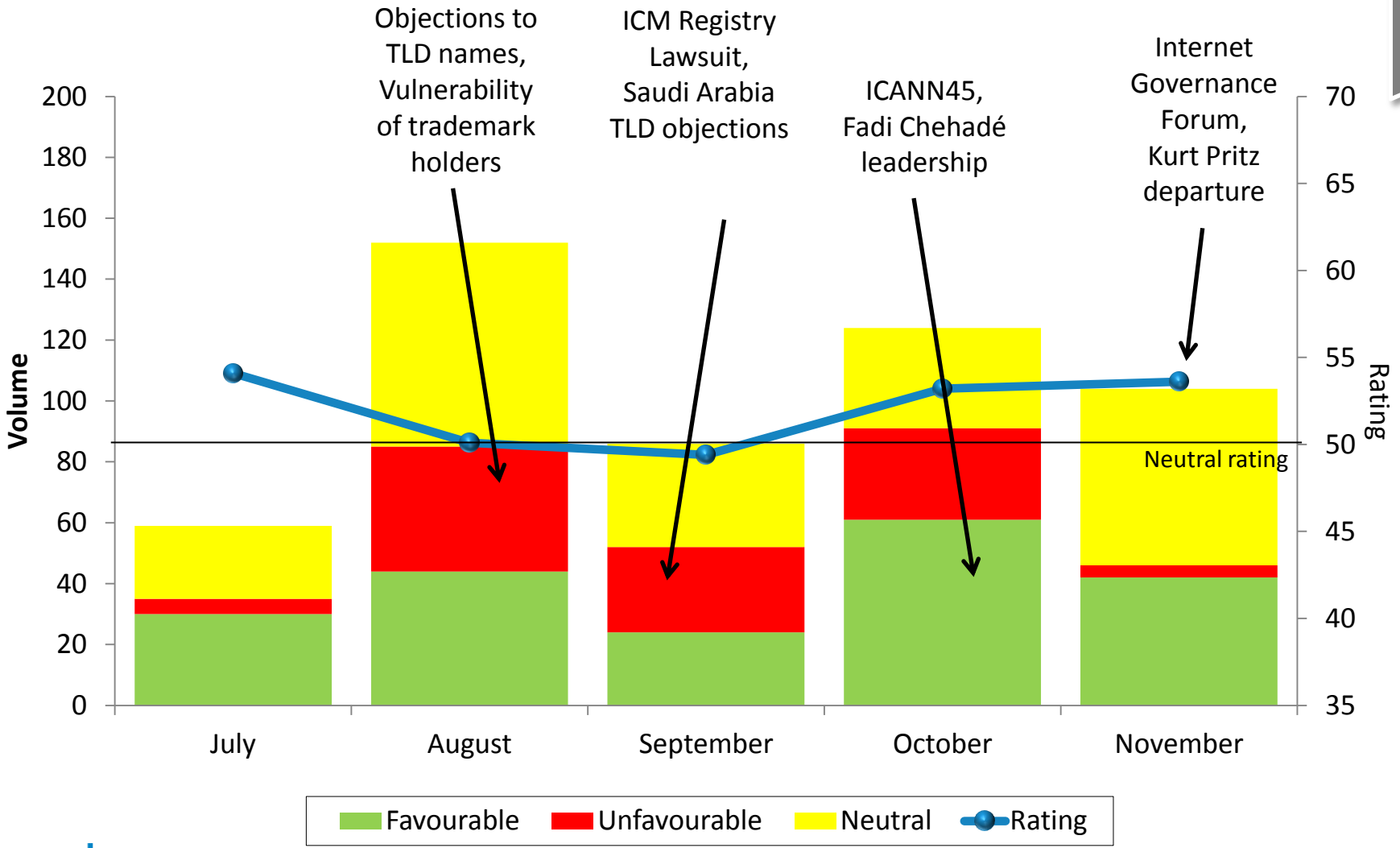
Rating: 51.8

- A total of 525 articles were researched with an average rating per article of 51.8.
- Slightly over one-third (38%) of all items were favourably assessed, led by ICANN45 and the IANA contract.
- Unfavourable content accounted for 21% of all articles with the cost of new gTLD registration provoking most criticism.
- Neutral coverage reached 41% of reporting, evenly divided between journalist-led and third-party generated items.

“An Internet constrained by an international treaty will stifle the innovators and entrepreneurs that are responsible for its phenomenal growth” (Lawrence Strickling, NTIA - Telecommunications Reports, 1/7).

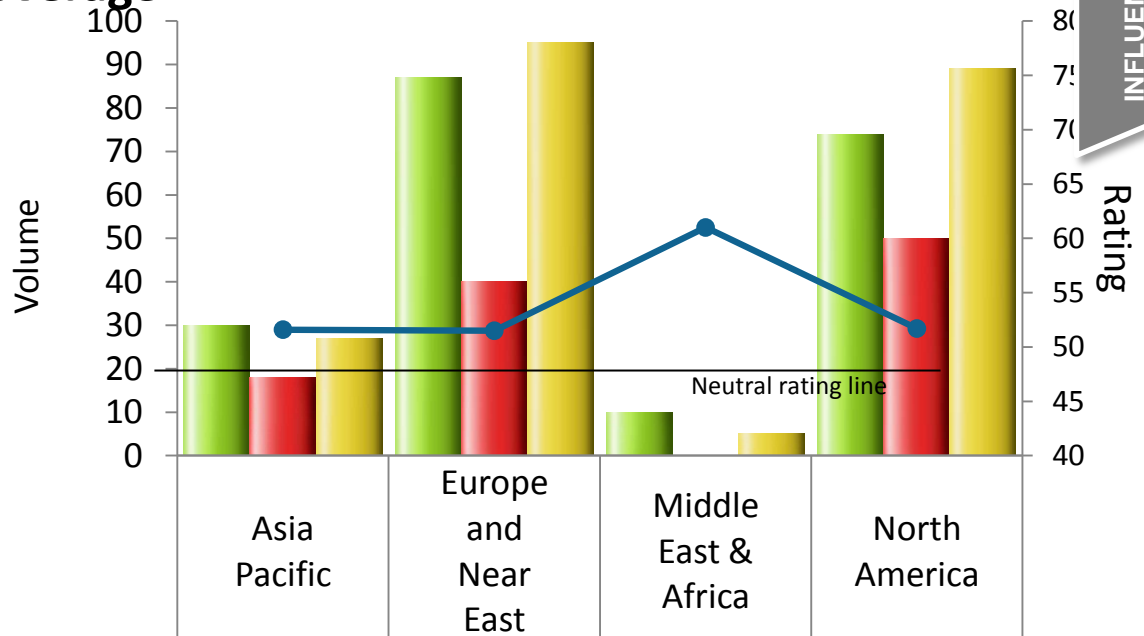
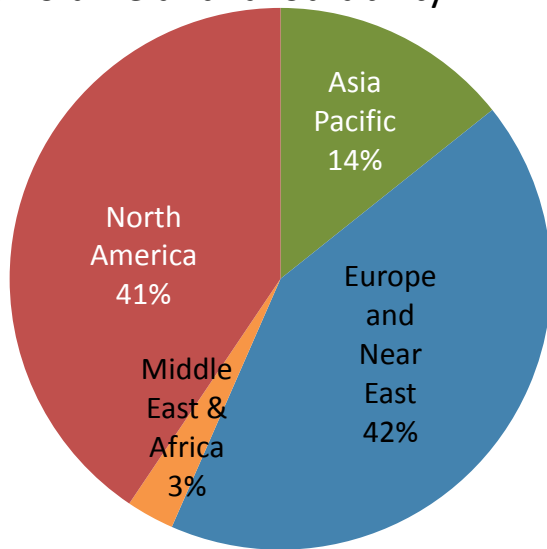
“Back when this plan was announced, I called it little more than a money grab by ICANN” (John Breeden, Government Computer News, 25/9).

Reputation Recovers in October and November Following September low



Europe & North America Dominate Coverage, Middle East & Africa Produce the Most Favourable Media Coverage

by volume and favourability



- Only three items were published in the LatAm region during the period analysed – two in Argentina and one in Brazil.
- The item from Brazil was very supportive of ICANN and Fadi, in particular. The two pieces in Argentina were critical of ICANN in respect to cyber security and domain name disputes.

Favourable	30	87	10	74
Unfavourable	18	40	0	50
Neutral	27	95	5	89
Rating	51.6	51.5	61	51.7

- Few items were published in Middle East and Africa publications, although reporting relating to the area was prominent in media from other regions.
- ICANN's new Africa strategy led by Nii Quaynor of Ghana, generated supportive reporting in the African press. The ratings in the remaining regions were very similar producing a comparable profile globally.

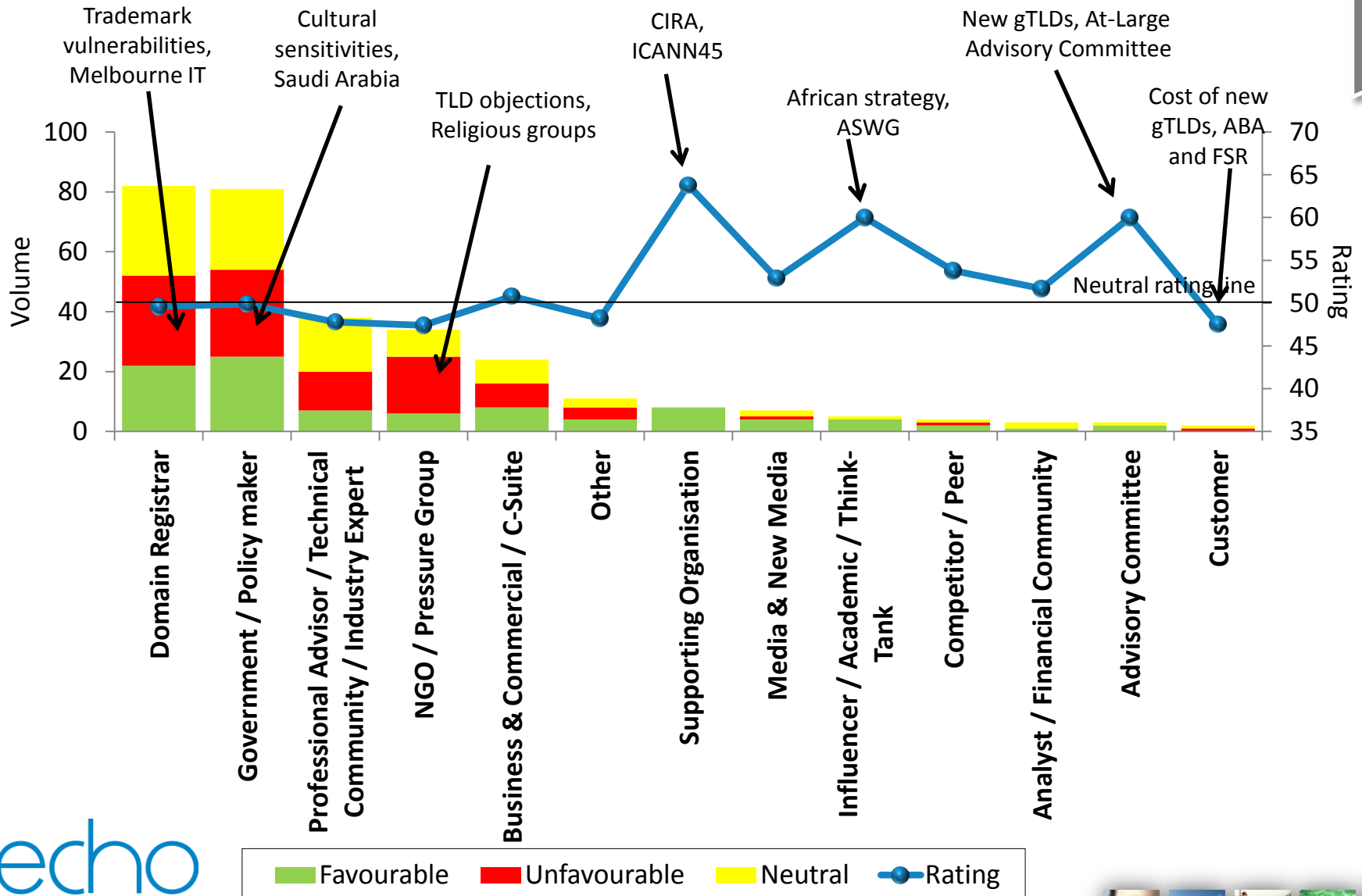
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July – November 2012

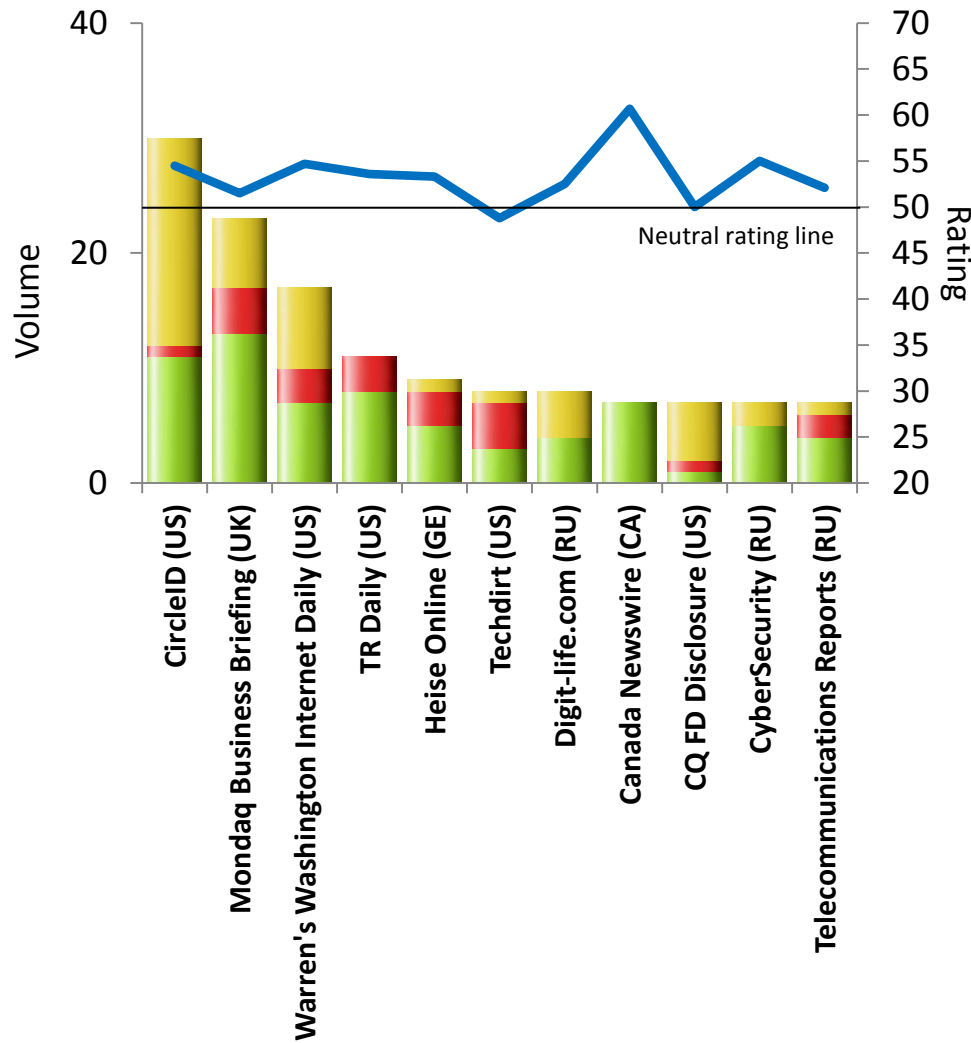


Key Issues for ICANN Stakeholders In the Media Center Around Domain Name Objections



Leading Sources of Media Coverage

by volume and favourability



- CircleID led media by volume, with many stakeholder opinion articles.
- Canada Newswire most supportive media with focus on ICANN45.
- Techdirt queried the necessity for new gTLDs and also the cost of applications.

INFLUENCE

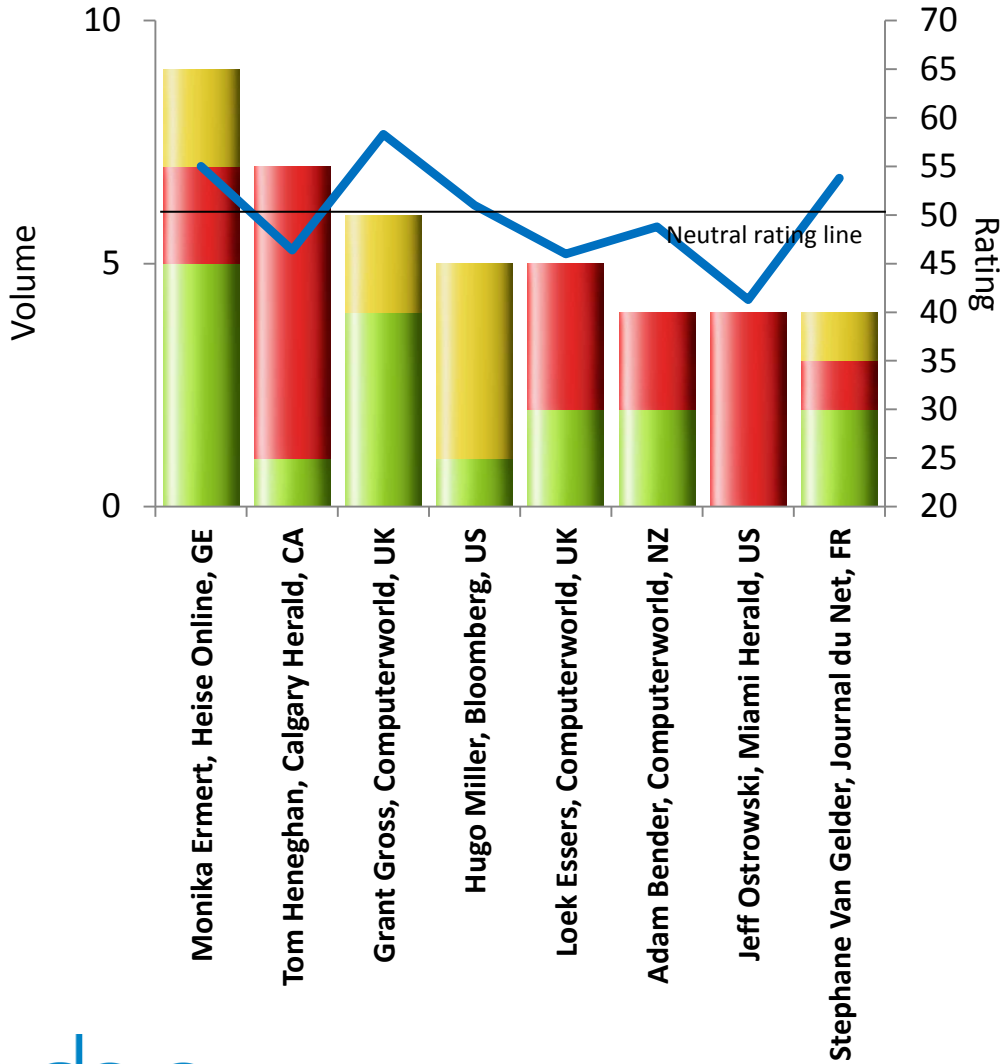


■ Favourable
 ■ Unfavourable
 ■ Neutral
 — Rating



Influential Bylines

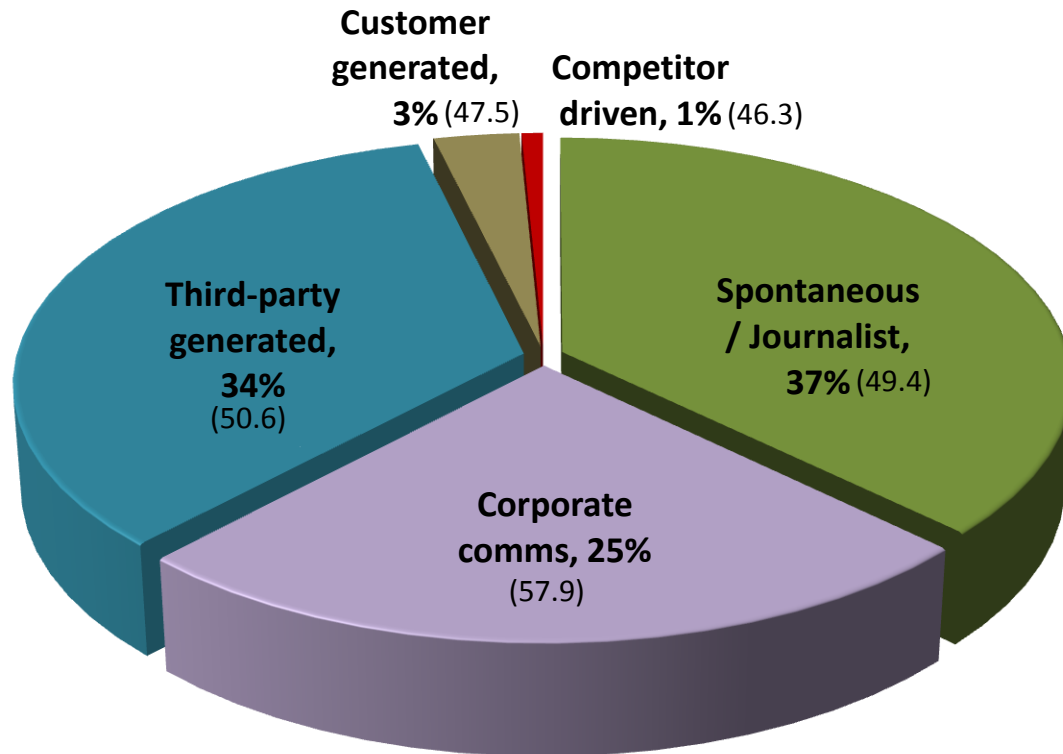
by volume and favourability



- Monika Ermert was the leading journalist by volume (nine items), endorsing Fadi Chehade's appointment.
- Grant Gross was the most sympathetic reporter (rating 58.3), most notably reproducing the myICANN press release.
- Religious domain name objections was the principal issue in Tom Heneghan's syndicated coverage.
- In a syndicated piece Jeff Ostrowski highlighted the profitability of the .xxx domain for ICM Registry and the battle owner Stuart Lawley fought against ICANN and the federal government for the domain.

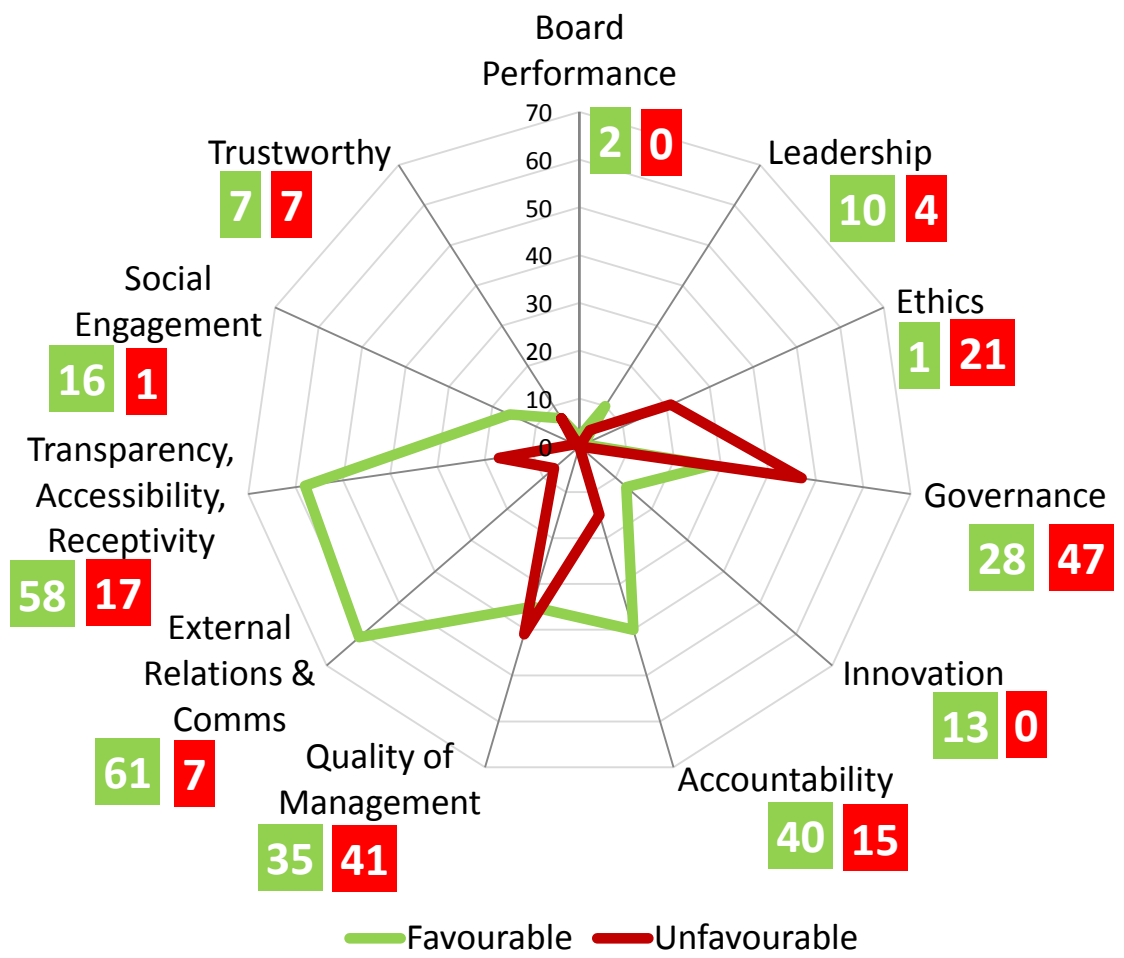


Corporate Communications in the Media are Positive But Underused



- Corporate communications provided the best quality of coverage (rating 57.9) but only accounted for one-quarter of all items (industry average is 40% - 60%)

Corporate Communications Help To Portray ICANN As Transparent and Accountable, But Questions Surrounding New gTLDs Negatively Impact Ethics, Quality of Management and Governance

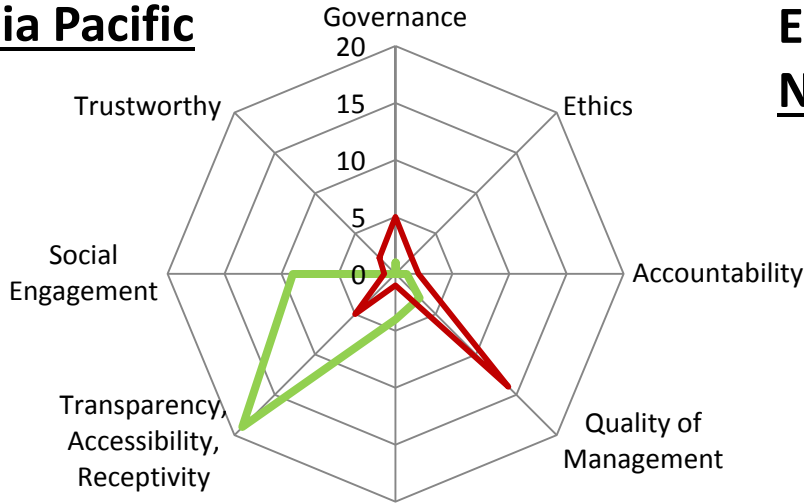


- External relations reputation was strong, driven by quality corporate communications.
- ICANN successfully portrayed a **transparent and accountable** image, underpinned by myICANN and a review of the WHOIS directory.
- Management’s competence and professionalism reputation, damaged in the context of the new gTLD programme, improved following the appointment of Fadi.
- ICANN’s governance image suffered as a result of stakeholders questioning the corporation’s ability to effectively manage the gTLD applications.
- ICANN’s ethical image was undermined by various stakeholders and journalists criticising the cost of gTLD applications and ICANN’s use of payments received.



Reputation Drivers By Region

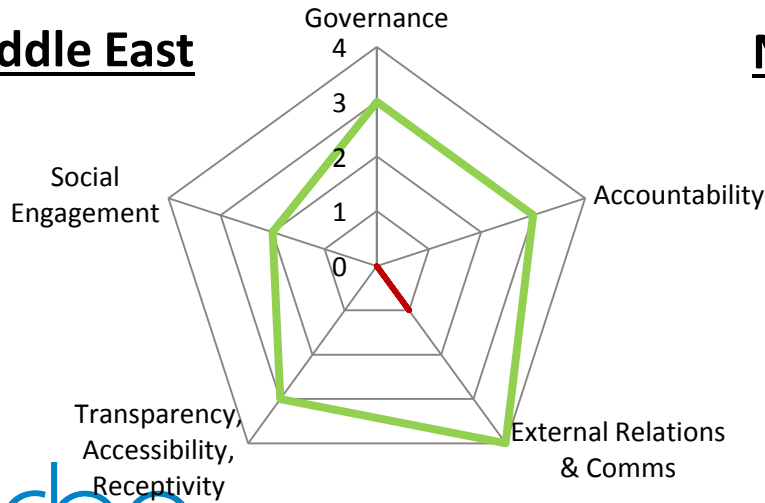
Asia Pacific



Europe & Near East



Middle East



North America



— Favourable — Unfavourable



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echo

GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION

www.echoresearch.com

T +1 (212) 901 0456 F +1 (212) 413 0891

E robertt@echoresearch.com



156 Fifth Avenue Suite 604 New York NY 10010 USA
Offices in: NEW YORK . LONDON . PARIS . SINGAPORE