IGF-USA 2021 Survey Results – Initial Report

The 2021 IGF-USA Subject Matter Survey ran from March 2-16, receiving a total of 108 responses. This document provides a summary of the results. Each calculation is described below and has accompanying charts and tables.

This document is the initial report and is being released prior to review by the Steering Committee. Therefore, it presents the data without attempting to draw any concrete conclusions.

At the end of the survey, respondents were asked a series of questions about themselves, including stakeholder group, number of IGF-USAs attended, and number of global IGFs attended. Before reviewing the results, here is make up of the survey respondents.

Stakeholder Breakdown

- **Private Sector:** 45 Responses (45.45%)
- **Civil Society / Academia**: 30 Responses (30.30%)
- **Technical Community**: 9 Responses (9.09%)
- **None / Other:** 11 Responses (11.11%)
- **Government / Intergovernmental Organization:** 4 Responses (4.04%)

Number of IGF-USAs Attended

- None: 16 (15.53%)
- 1 IGF-USA: 27 (26.21%)
- 2 IGF-USAs: 13 (12.62%)
- 3 IGF-USAs: 12 (11.65%)
- 4+ IGF-USAs: 35 (33.98%)

Number of global IGFs Attended

- None: 34 (33.66%)
- 1 IGF: 17 (16.48%)
- 2 IGFs: 16 (15.84%)
- 3 IGFs: 4 (3.96%)
- 4+ IGFs: 30 (33.66%)

Survey Structure

Based on the results from the Call for Topics and subsequent deliberations of the Steering Committee, the survey was organized into three main sections and built around 9 subject areas:

- Cybersecurity
- Data Governance and Privacy
- Content Policy
- Global Internet Infrastructure
- 5G
- Access and Digital Inclusion
- Digital Markets and Competition
- Artificial Intelligence
- Trust

Section 1 was based on cross-cutting themes. Each theme included in this section represented a lever of influence that could have both positive and negative impacts on each subject and related topics. Respondents were asked to identify the themes they would like to see explored for each subject area, with no limits on how many options the respondents could select.

Themes included:

- Best Practices and Norms
- Regulation and Enforcement
- Intergovernmental Cooperation
- Emerging Technologies and Disruption
- Technical Standards

Section 2 was based on breaking down each subject area into more specific topics sourced from the 112 submissions received during the Call for Topics. Each subject area included between 5 and 9 specific topics and respondents were asked to rate all of the *topic*s on how essential they are to their respective *subject area,* using a three point Likert scale:

- **Essential -** Needs to be included in this subject areas portion of the program and should either have its own session or be a major focus of a session
- **Important** - Should be included in this subject areas portion of the program in support of the larger conversation
- **Not Very Important**- Should not be included in this subject areas portion of the program unless organically elevated by larger conversation

Section 3 simply asked respondents to use a scale of 0-10 to indicate how much emphasis should be placed on each *subject area*.

Understanding the Results

This report presents the data in a variety of ways and breaks down the results using various metrics, including how respondents answered specific questions. In particular, the responses from Section 3 will be used to filter the results from Sections 1 and 2. In addition to providing the full data for each subject area in Sections 1 and 2, results will be provided based on the following conditions:

- All Responses
- Results from responses that rated the corresponding subject area 5 or higher – This metric is used to limit the results to respondents that **at a minimum** recognize the importance of the subject area, but also includes those with a significant interest and/or expertise.
- Results from responses that rated the corresponding subject area 8 or higher – This metric is used to limit the results to respondents that **at a minimum** have a significant interest and/or expertise in the subject area.

Cross-Cutting Themes

Results from Section 1 will be displayed as the percentage of respondents that selected each option and the relevant results will be included in each Subject Area Breakdown. These results will be provided in four graphs/tables – one from each of the Section 3 metrics and another that combines the results into a single graph/table for comparison across metrics.

Rating Topics

Results from Section 2 use two measurements – mean scores and response counts for each option. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

- Not Very Important = 1
- Important = 2
- Essential = 3

Results for both the mean scores and response counts will be provided in graphs/tables for each of the metrics from Section 3. An additional graph/table for comparison across metrics will only be provided for the mean scores. It was determined that it was easier to compare the response counts using the separate graphs than interpreting the comparison on a single complicated chart.

Rating Subject Areas

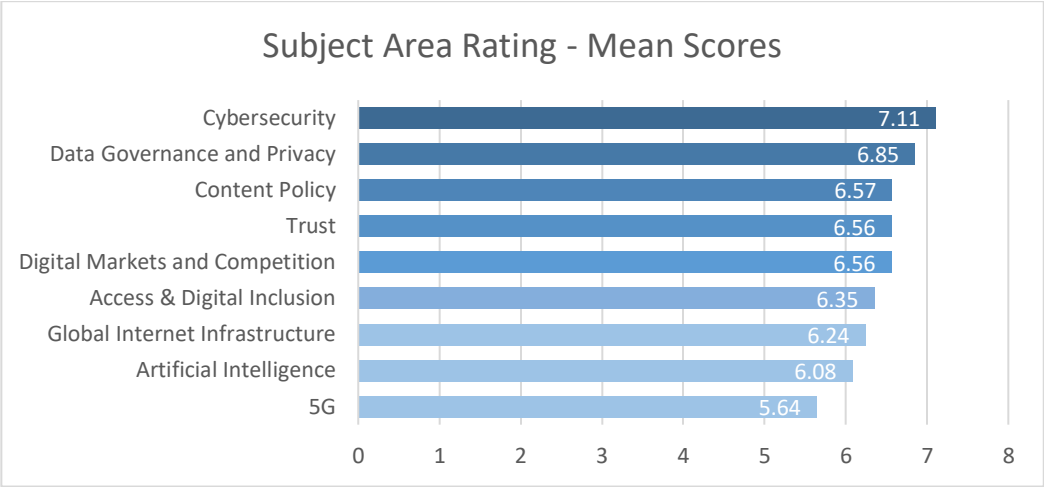
Respondents were asked to use a scale of 0-10 to indicate how much emphasis should be placed on the 9 different subject areas in the survey. This section provides the results based on two different metrics:

- Mean score of all responses
- Response counts for specific ranges of rating (1-4; 5-7; 8-10)

The mean scores provide a general understanding of how each subject area performed in this section of the survey, but the break down by specific ranges allows for a more detailed look at how respondents rated each subject. For example, ”Trust” and “Digital Markets and Competition” had the same mean score, but the specific response counts that seem to indicate that a greater number of respondents **at a minimum** recognize the importance of “Digital Markets and Competition,” while a greater number of respondents **at a minimum** have a significant interest and/or expertise in the subject area.

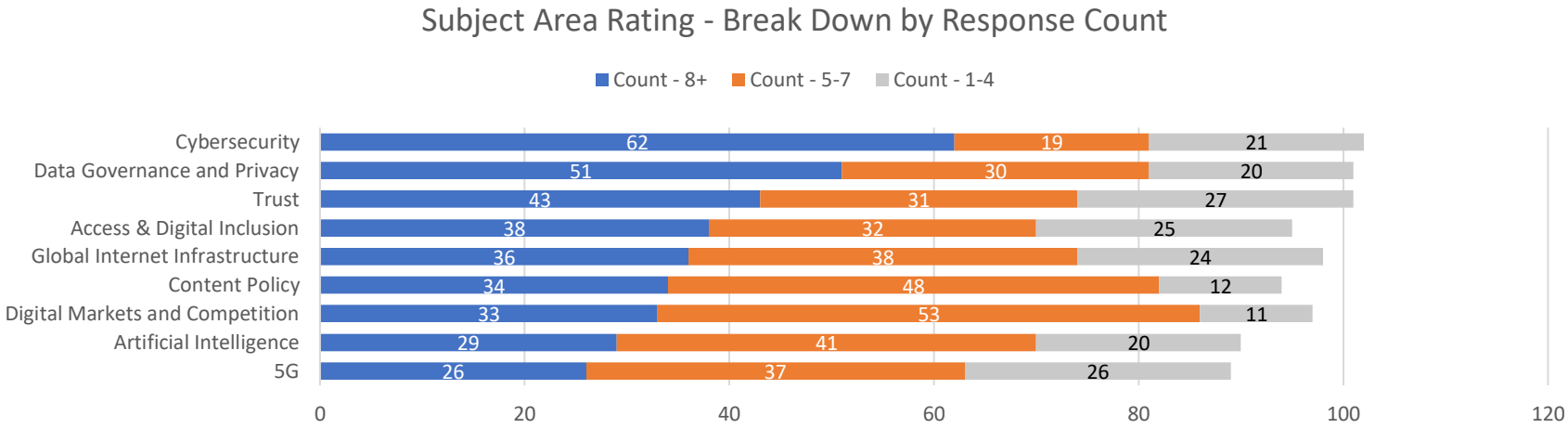
Subject Area Rating

The chart and table below show the mean scores for each subject area sorted from highest to lowest.



Subject Area	Mean
Cybersecurity	7.11
Data Governance and Privacy	6.85
Content Policy	6.57
Trust	6.56
Digital Markets and Competition	6.56
Access & Digital Inclusion	6.35
Global Internet Infrastructure	6.24
Artificial Intelligence	6.08
5G	5.64

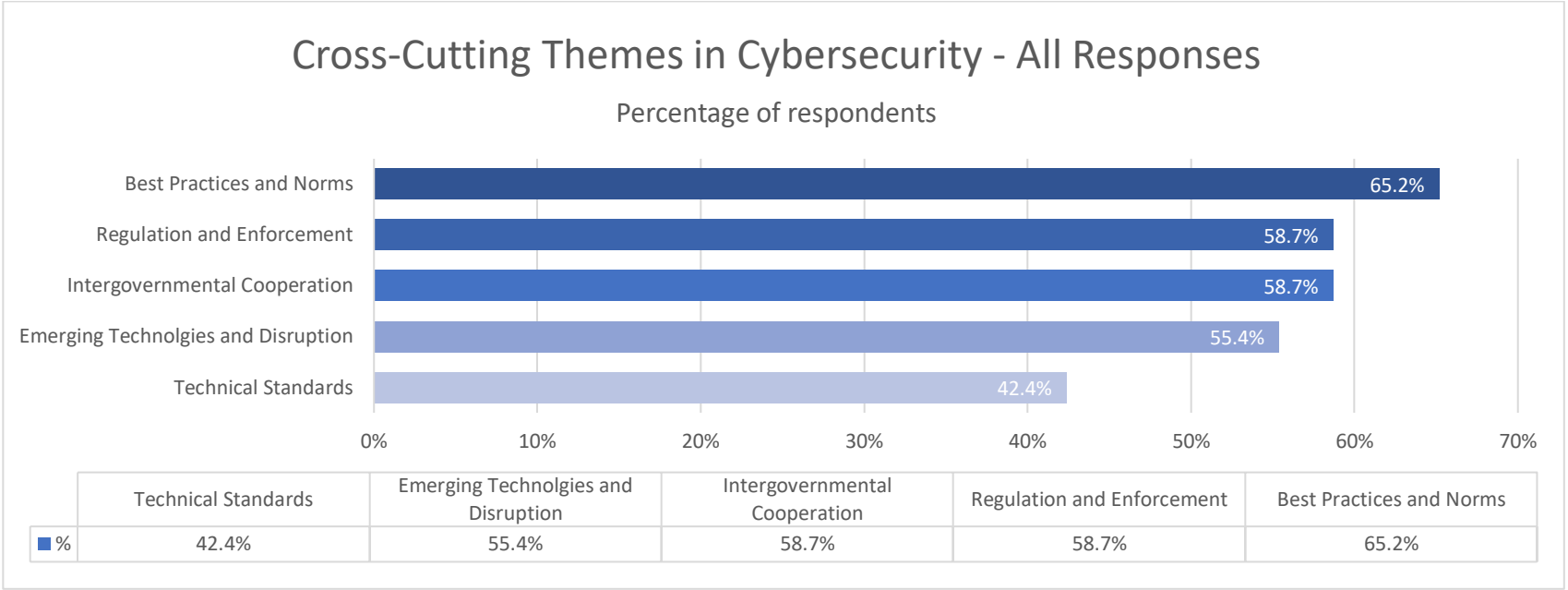
The chart and table below show the response counts within each specified range for each subject area: 1-4, 5-7, and 8-10.



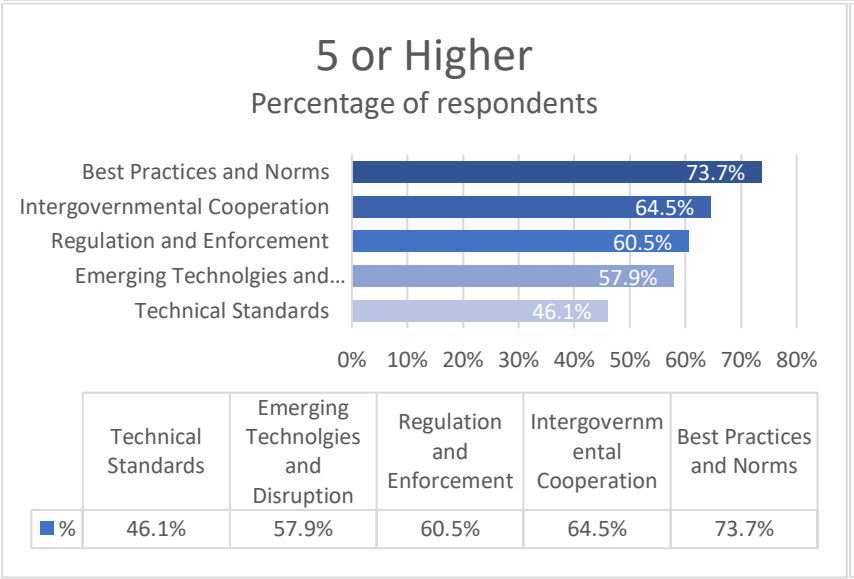
	5G	Artificial Intelligence	Digital Markets and Competition	Content Policy	Global Internet Infrastructure	Access & Digital Inclusion	Trust	Data Governance and Privacy	Cybersecurity
Count - 8+	26	29	33	34	36	38	43	51	62
Count - 5-7	37	41	53	48	38	32	31	30	19
Count - 1-4	26	20	11	12	24	25	27	20	21

Cross-Cutting Themes

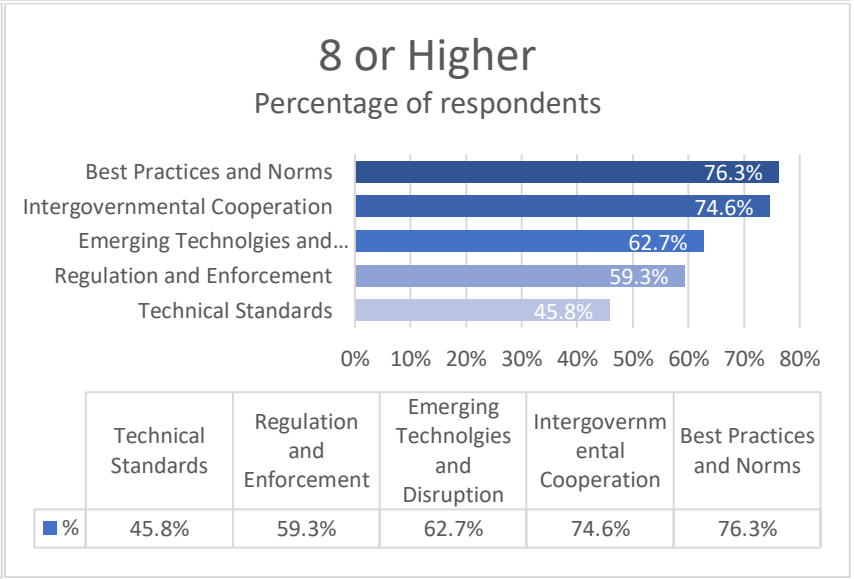
The charts below show the percentage of respondents that selected each theme for the Cybersecurity Subject Area, based on the rating they gave to Cybersecurity in Section 3.



	Technical Standards	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Regulation and Enforcement	Best Practices and Norms
%	42.4%	55.4%	58.7%	58.7%	65.2%

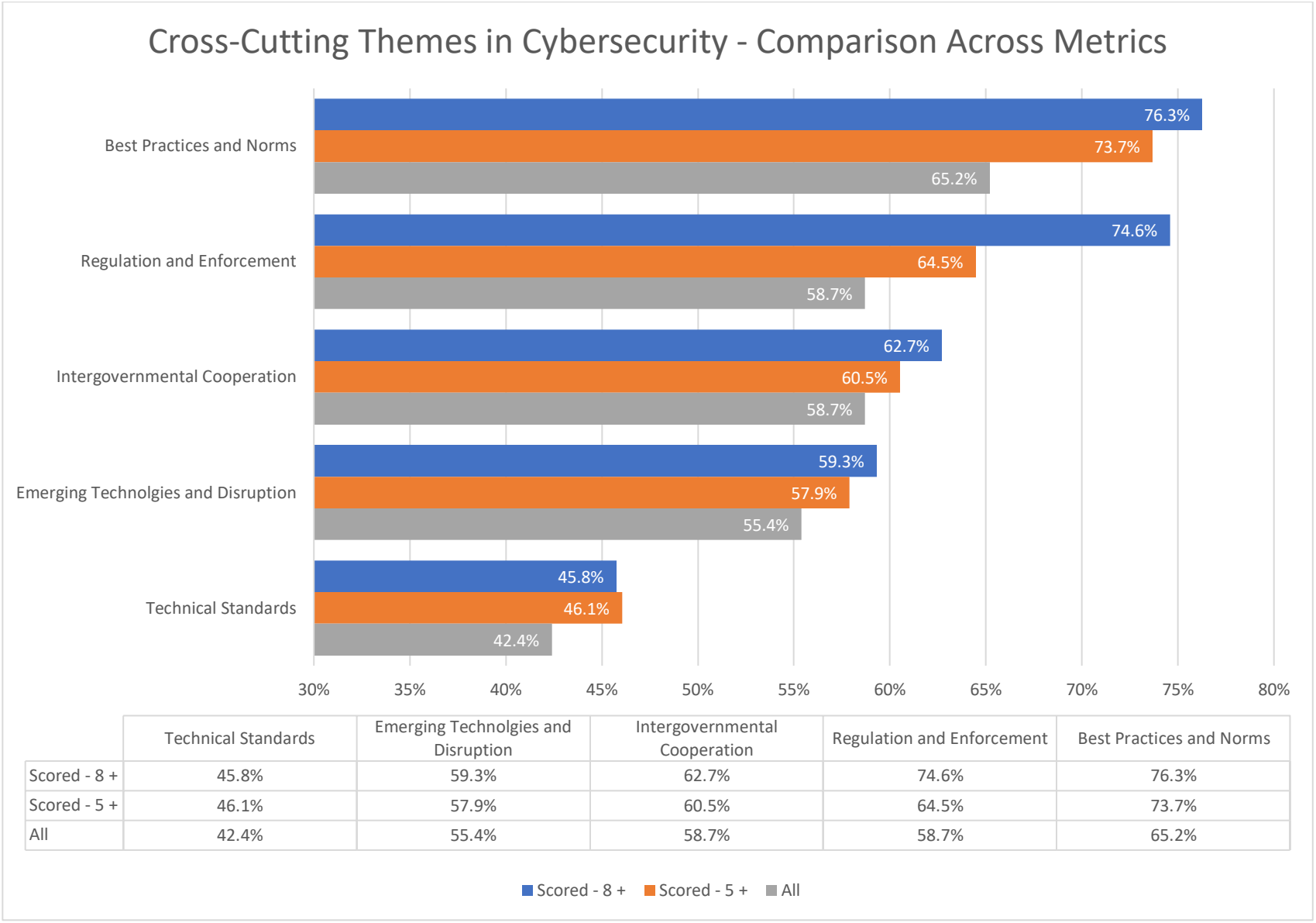


	Technical Standards	Emerging Technolgies and Disruption	Regulation and Enforcement	Intergovernmental Cooperation	Best Practices and Norms
%	46.1%	57.9%	60.5%	64.5%	73.7%



	Technical Standards	Regulation and Enforcement	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Best Practices and Norms
%	45.8%	59.3%	62.7%	74.6%	76.3%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

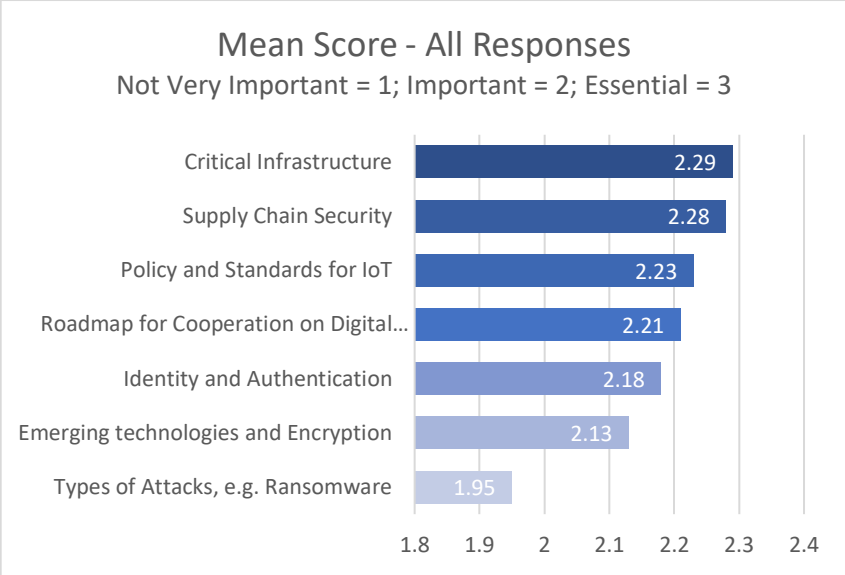


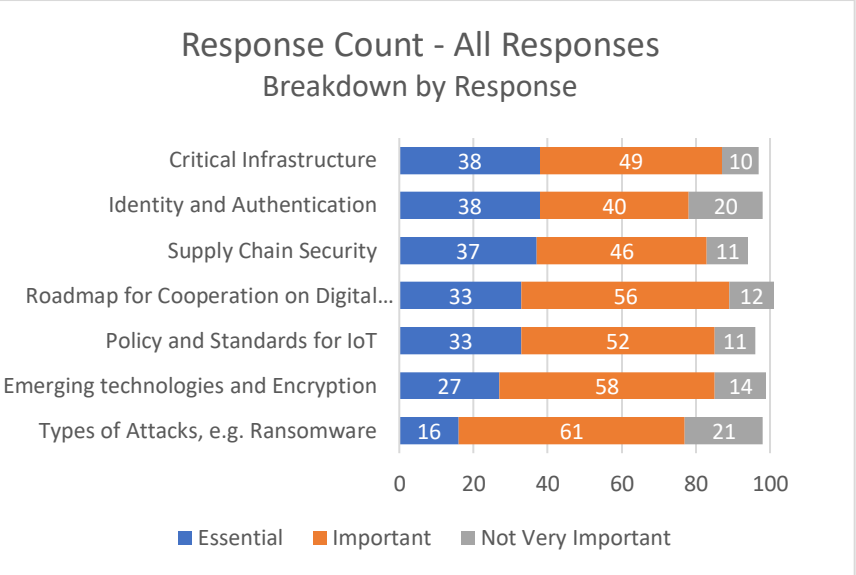
	Technical Standards	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Regulation and Enforcement	Best Practices and Norms
Scored - 8 +	45.8%	59.3%	62.7%	74.6%	76.3%
Scored - 5 +	46.1%	57.9%	60.5%	64.5%	73.7%
All	42.4%	55.4%	58.7%	58.7%	65.2%

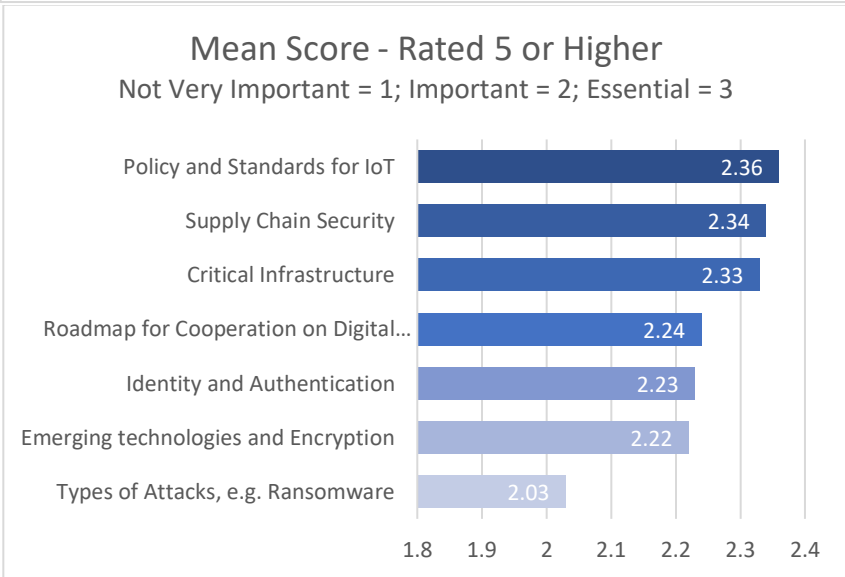
Cybersecurity Topics

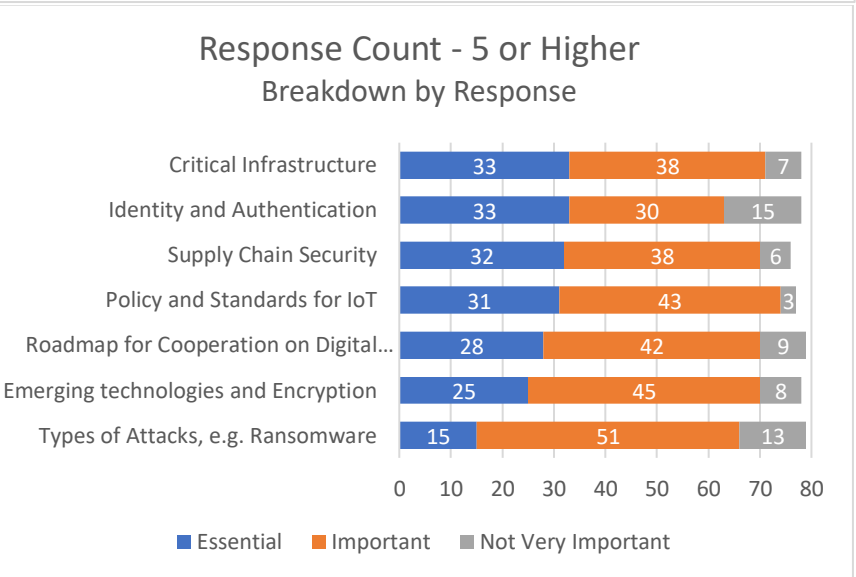
The charts below show the mean scores and response counts for each option, based on the rating they gave to Cybersecurity in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

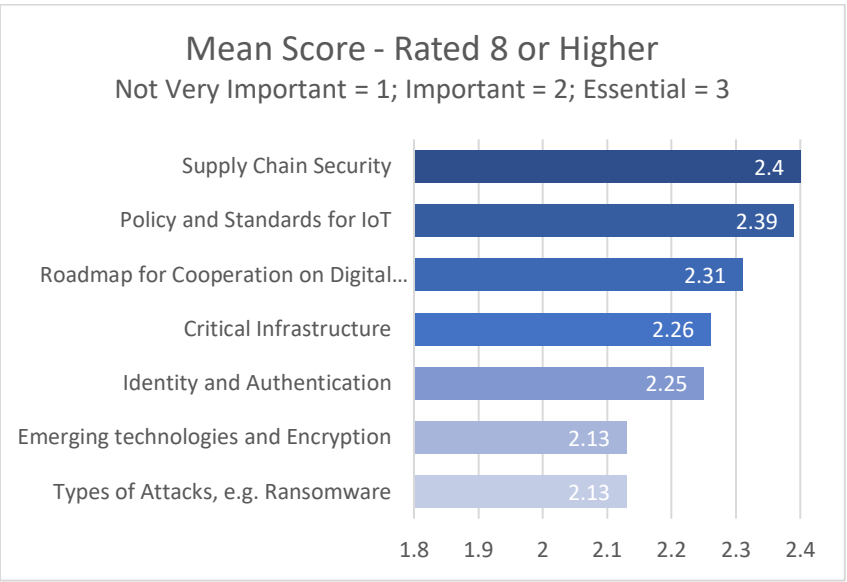
- Not Very Important = 1
- Important = 2
- Essential = 3

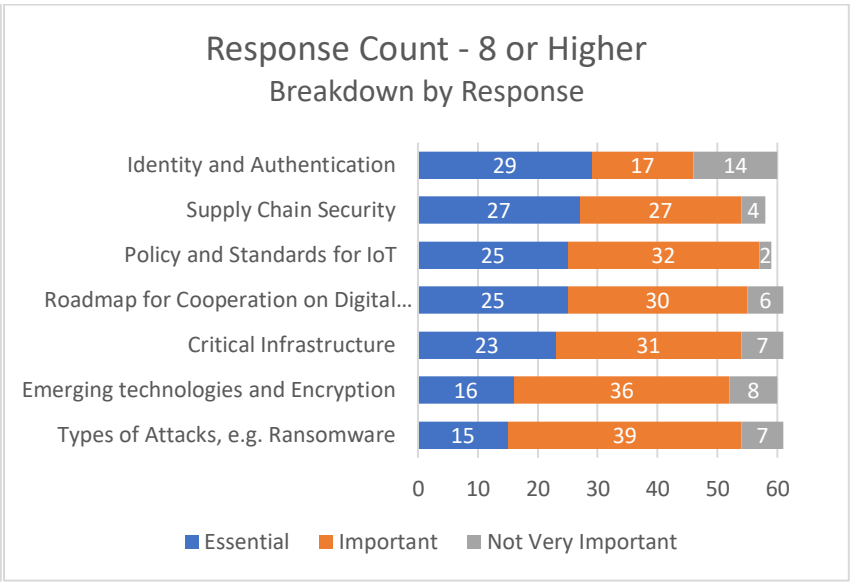


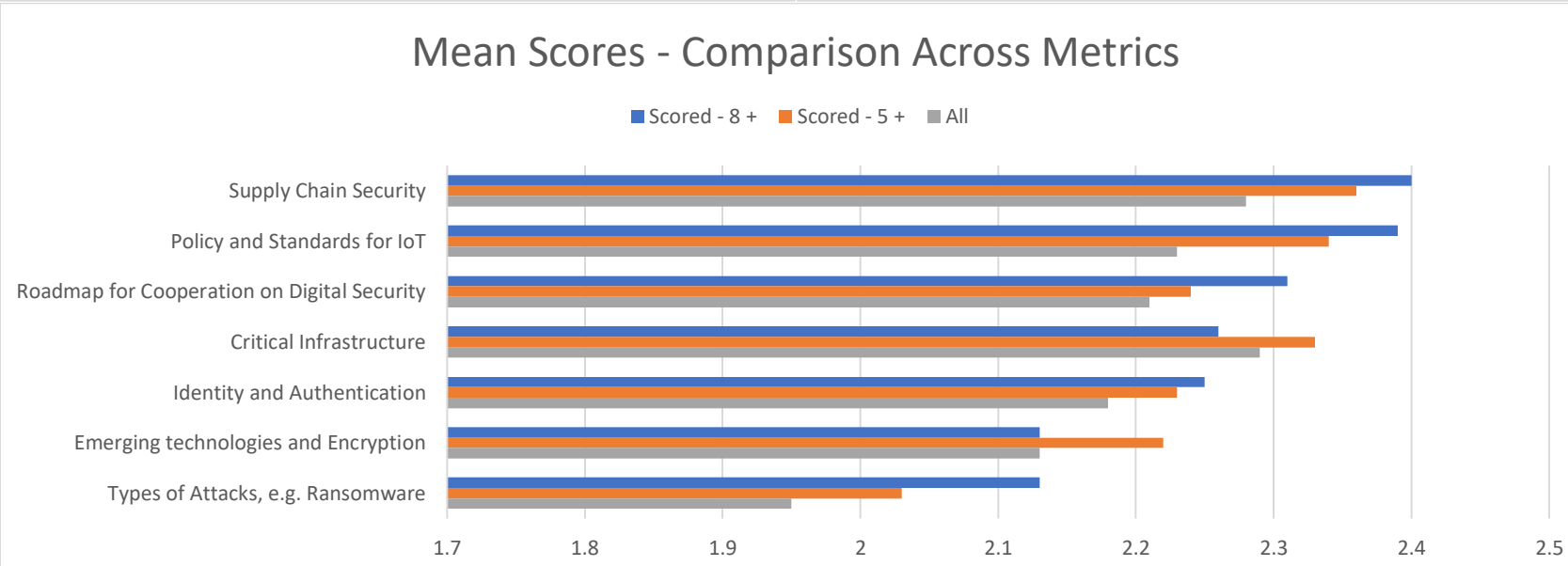










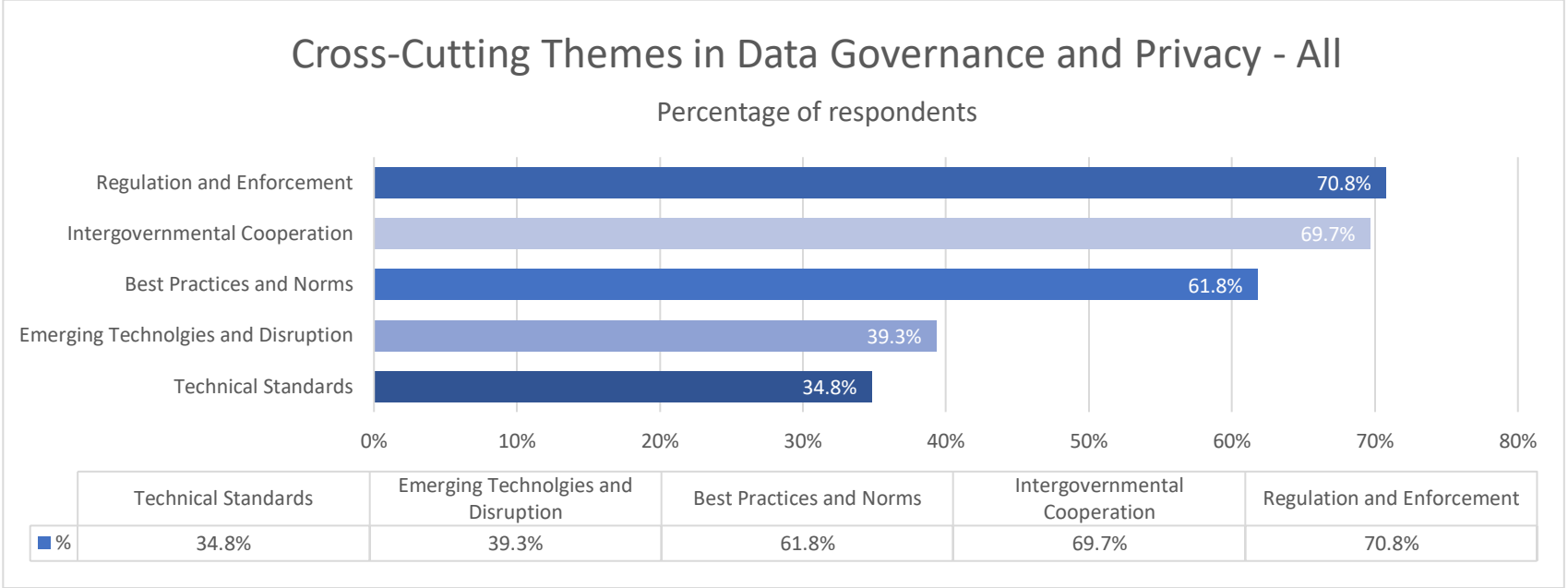


	Types of Attacks, e.g. Ransomware	Emerging technologies and Encryption	Identity and Authentication	Critical Infrastructure	Roadmap for Cooperation on Digital Security	Policy and Standards for IoT	Supply Chain Security
Scored - 8 +	2.13	2.13	2.25	2.26	2.31	2.39	2.4
Scored - 5 +	2.03	2.22	2.23	2.33	2.24	2.34	2.36
All	1.95	2.13	2.18	2.29	2.21	2.23	2.28

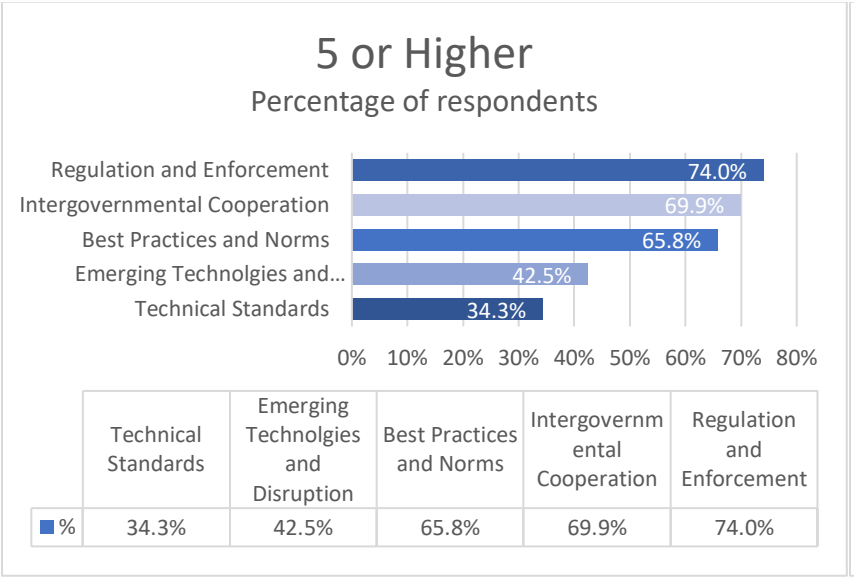
Subject Area Breakdown – Data Governance and Privacy

Cross-Cutting Themes

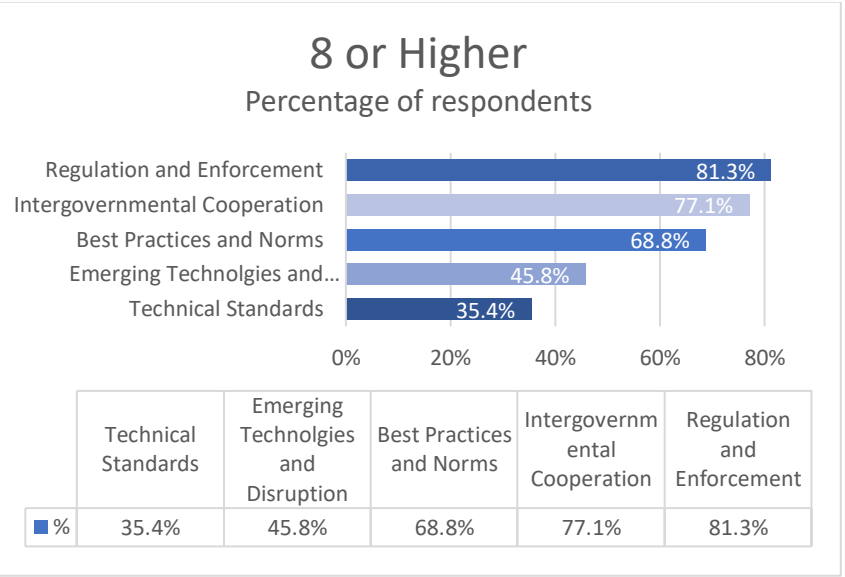
The charts below show the percentage of respondents that selected each theme for the Data Governance and Privacy Subject Area, based on the rating they gave to Data Governance and Privacy in Section 3.



	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement
%	34.8%	39.3%	61.8%	69.7%	70.8%

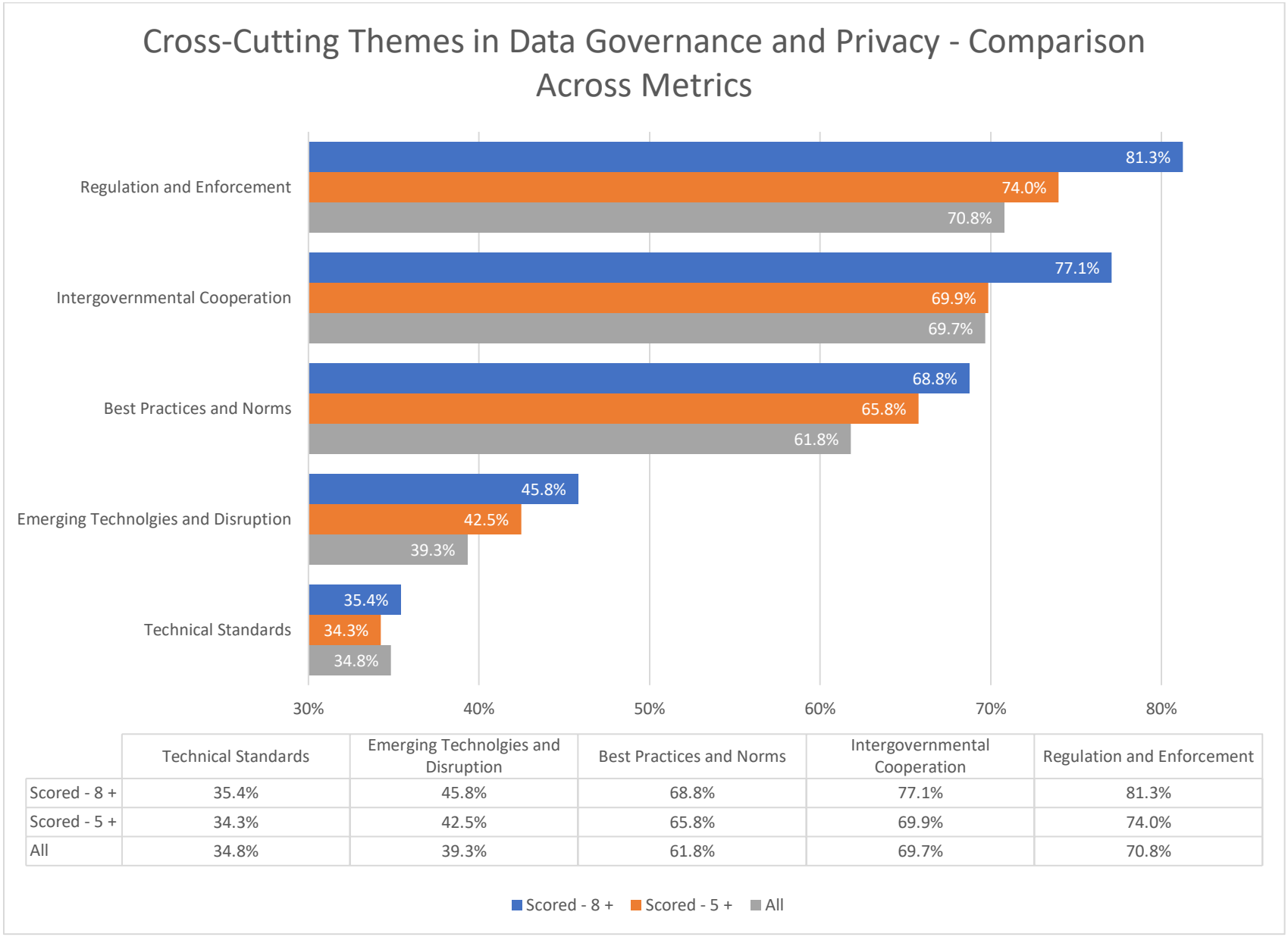


	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement
%	34.3%	42.5%	65.8%	69.9%	74.0%



	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement
%	35.4%	45.8%	68.8%	77.1%	81.3%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

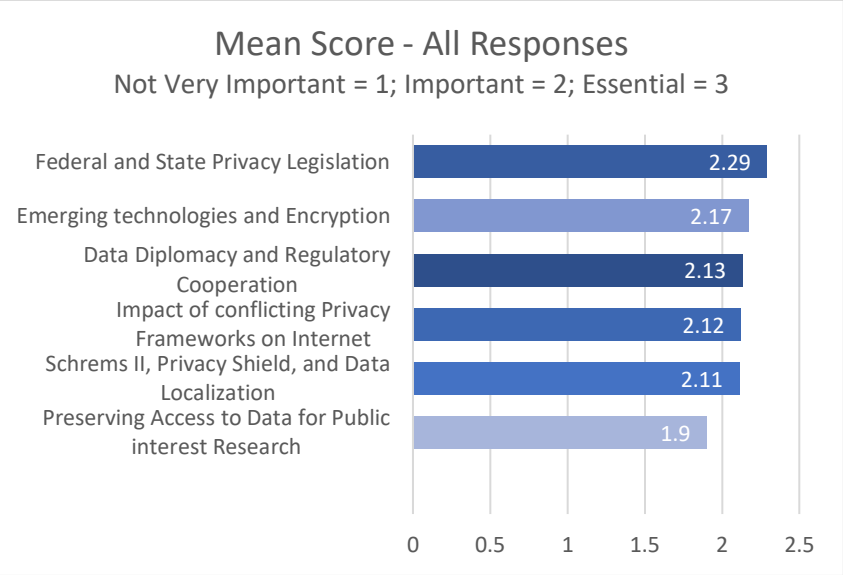


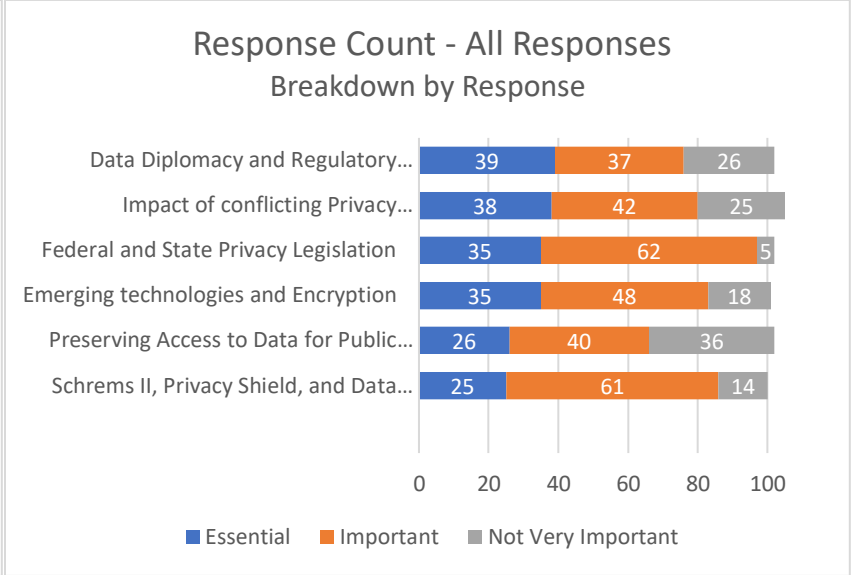
	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement
Scored - 8 +	35.4%	45.8%	68.8%	77.1%	81.3%
Scored - 5 +	34.3%	42.5%	65.8%	69.9%	74.0%
All	34.8%	39.3%	61.8%	69.7%	70.8%

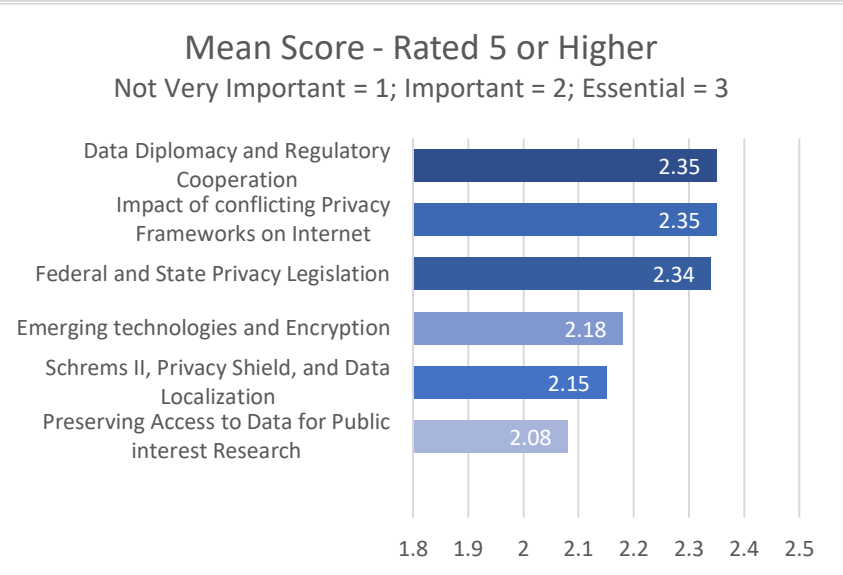
Data Governance and Privacy Topics

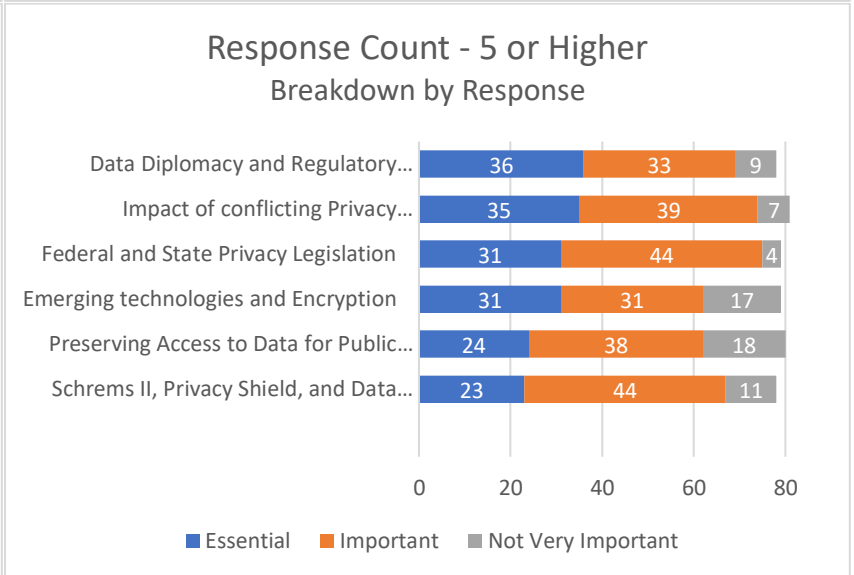
The charts below show the mean scores and response counts for each option, based on the rating they gave to Data Governance and Privacy in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

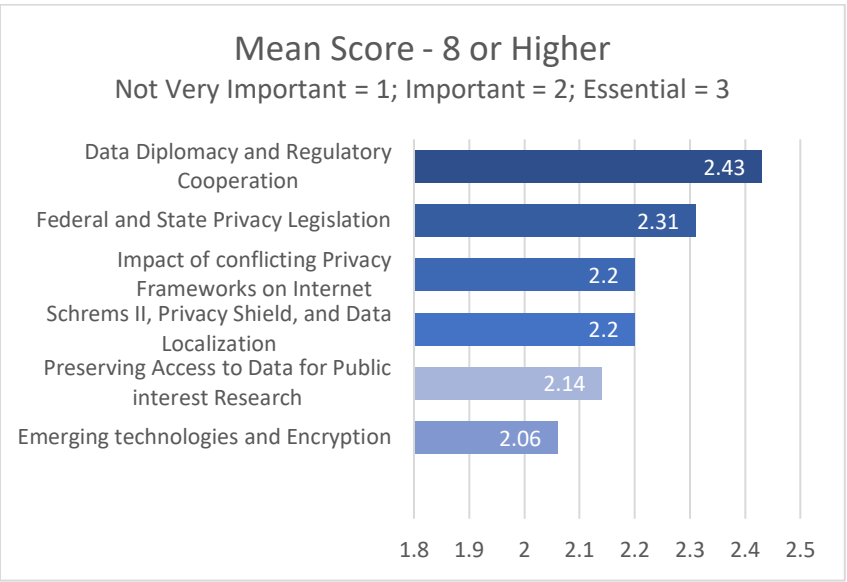
- Not Very Important = 1
- Important = 2
- Essential = 3

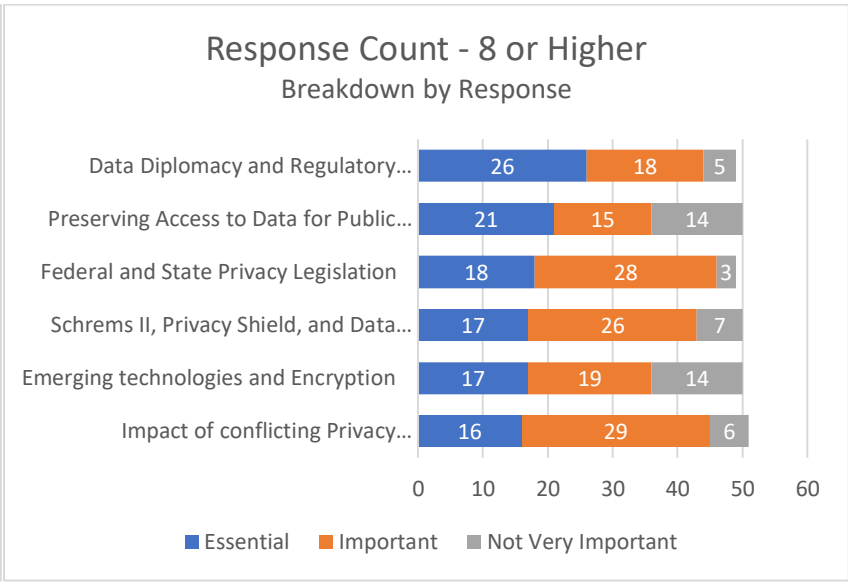


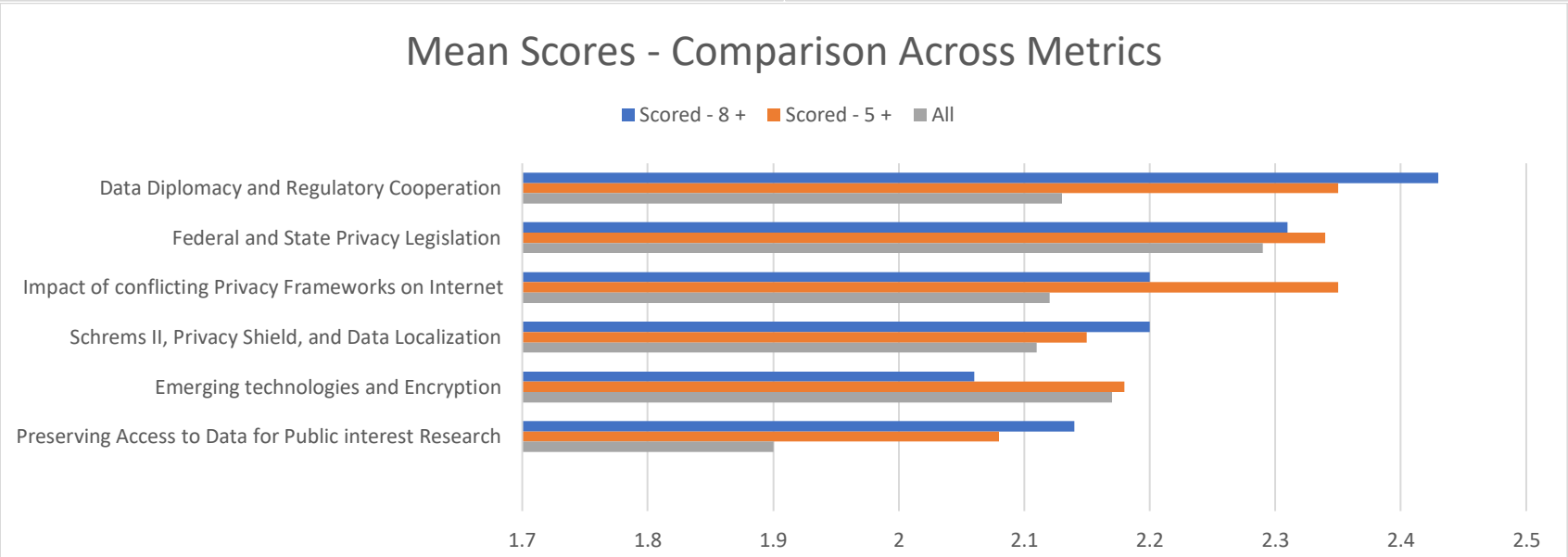










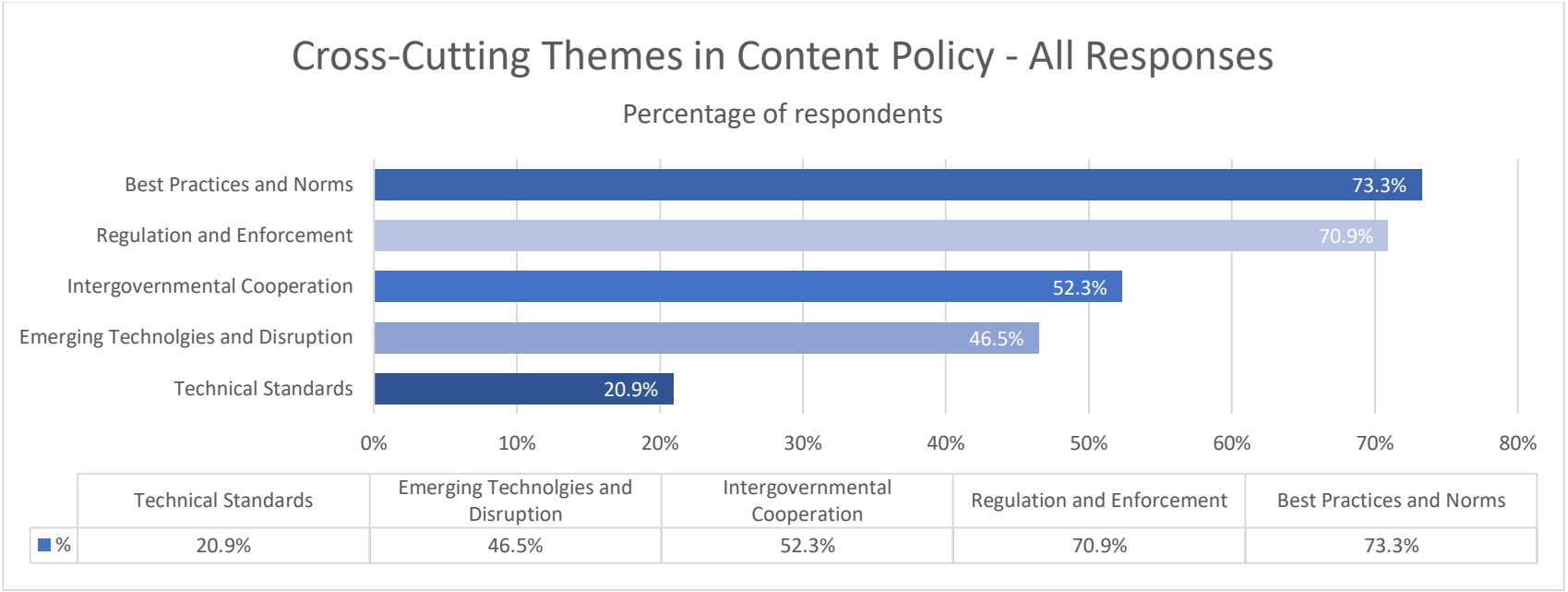


		Preserving Access to Data for Public interest Research	Emerging technologies and Encryption	Schrems II, Privacy Shield, and Data Localization	Impact of conflicting Privacy Frameworks on Internet	Federal and State Privacy Legislation	Data Diplomacy and Regulatory Cooperation
Scored - 8 +		2.14	2.06	2.2	2.2	2.31	2.43
Scored - 5 +		2.08	2.18	2.15	2.35	2.34	2.35
All		1.9	2.17	2.11	2.12	2.29	2.13

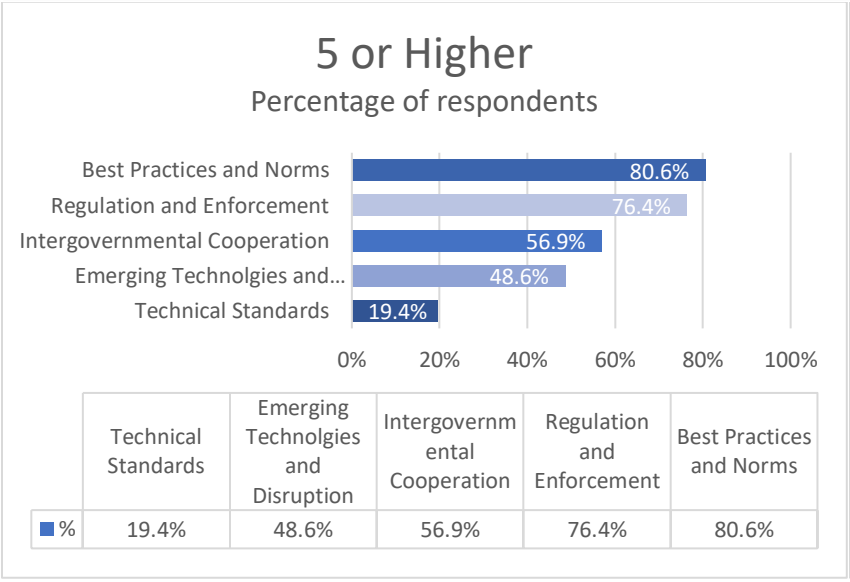
Subject Area Breakdown – Content Policy

Cross-Cutting Themes

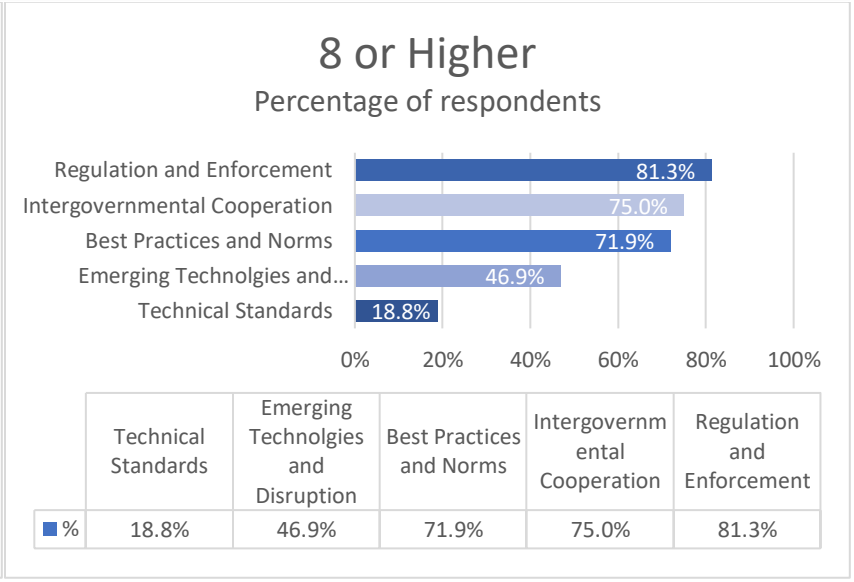
The charts below show the percentage of respondents that selected each theme for the Content Policy Subject Area, based on the rating they gave to Content Policy in Section 3.



	Technical Standards	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Regulation and Enforcement	Best Practices and Norms
%	20.9%	46.5%	52.3%	70.9%	73.3%

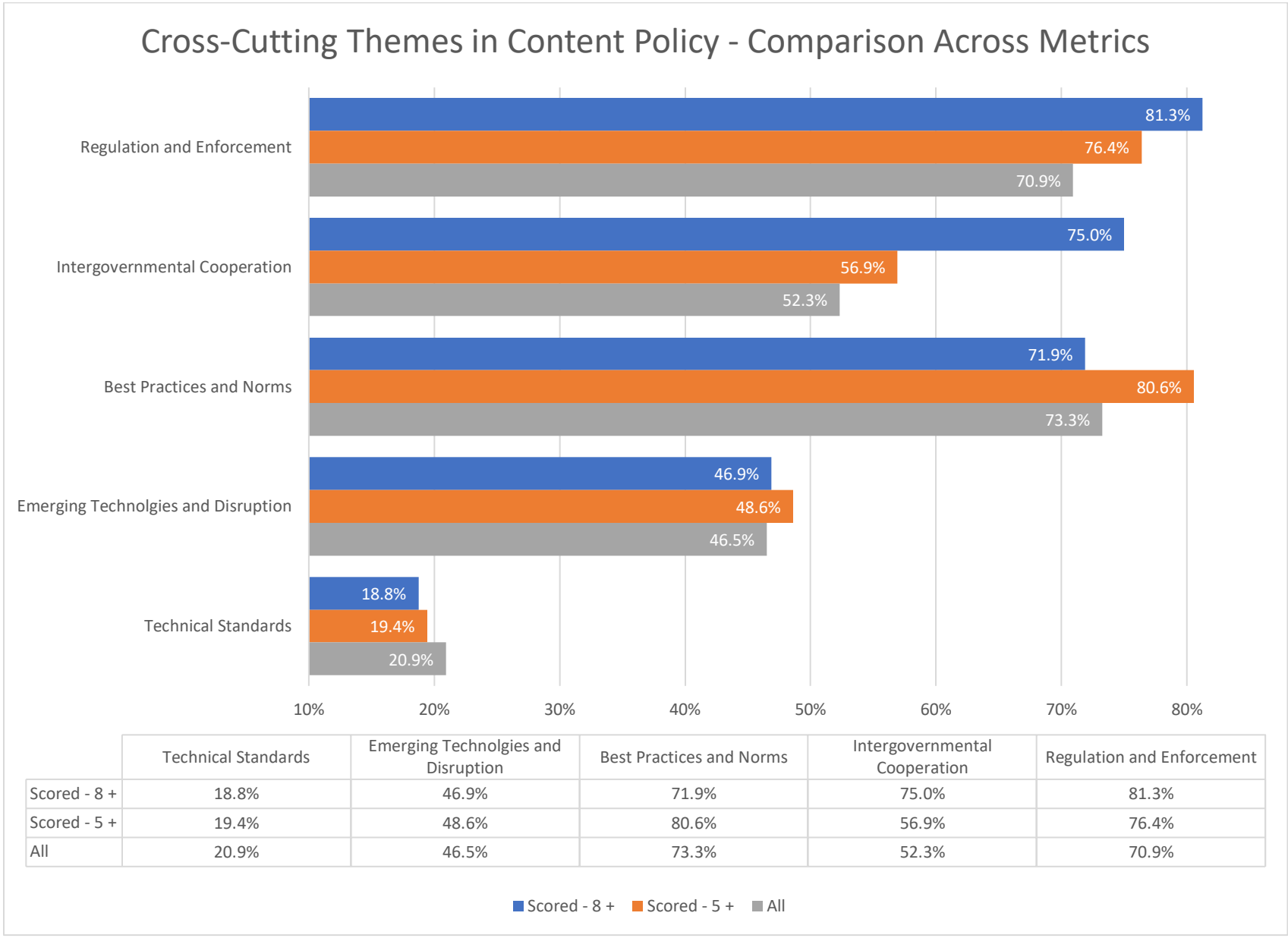


	Technical Standards	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Regulation and Enforcement	Best Practices and Norms
%	19.4%	48.6%	56.9%	76.4%	80.6%



	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement
%	18.8%	46.9%	71.9%	75.0%	81.3%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

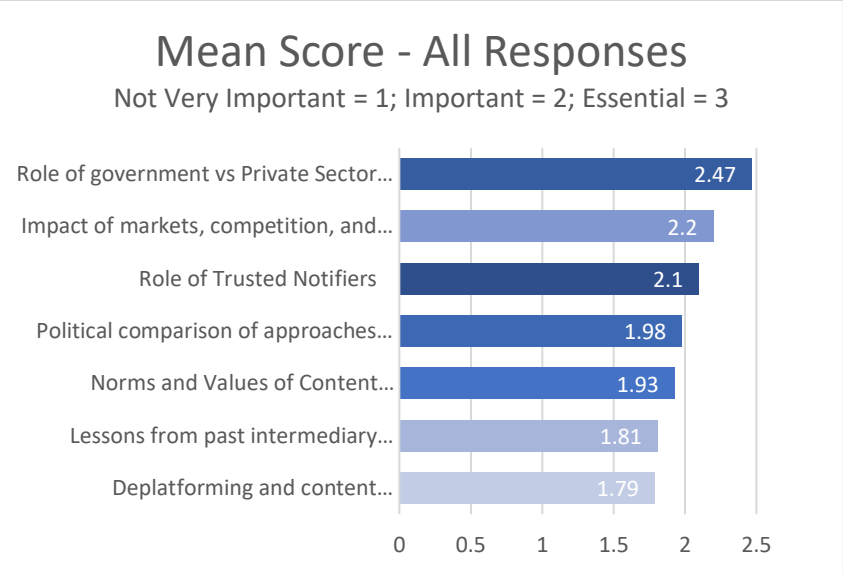


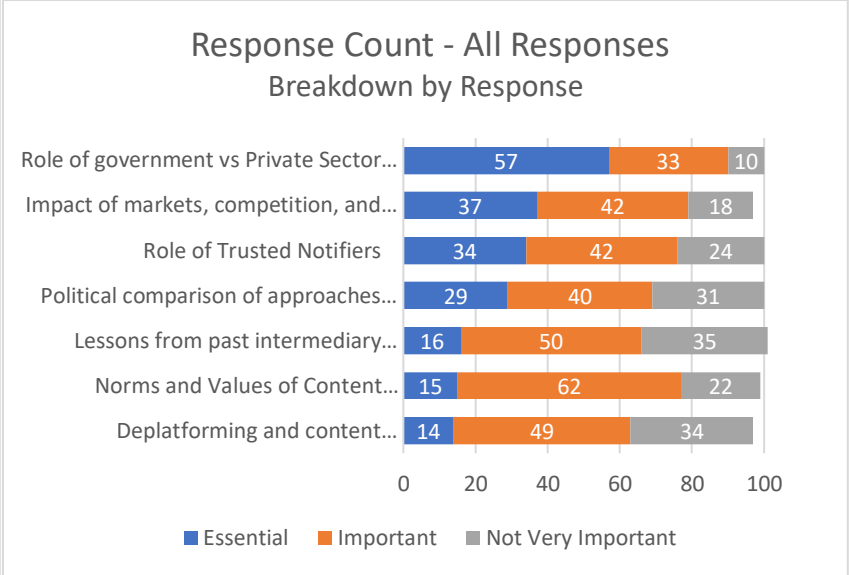
	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement
Scored - 8 +	18.8%	46.9%	71.9%	75.0%	81.3%
Scored - 5 +	19.4%	48.6%	80.6%	56.9%	76.4%
All	20.9%	46.5%	73.3%	52.3%	70.9%

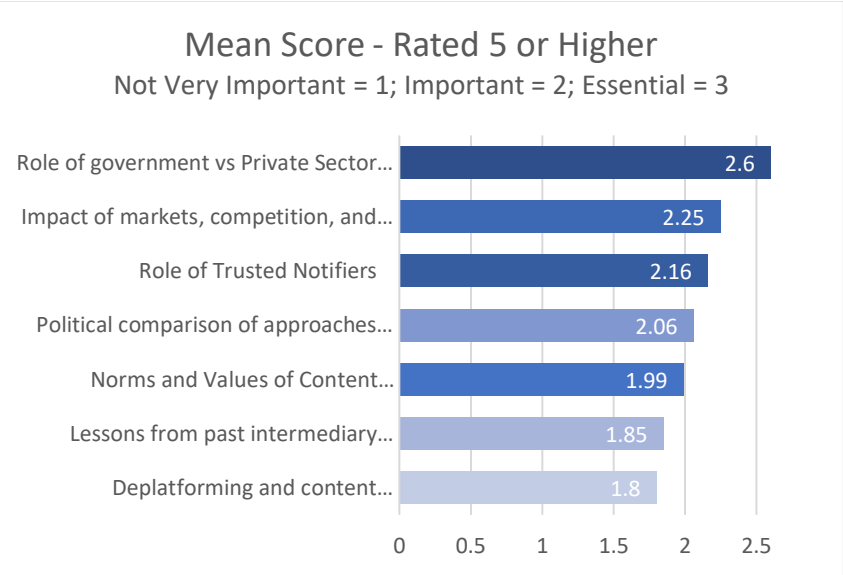
Content Policy Topics

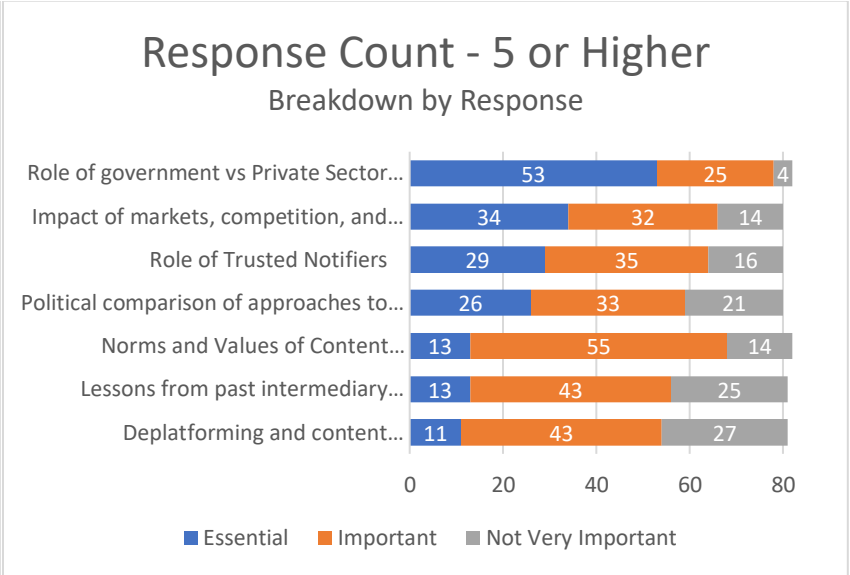
The charts below show the mean scores and response counts for each option, based on the rating they gave to Content Policy in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

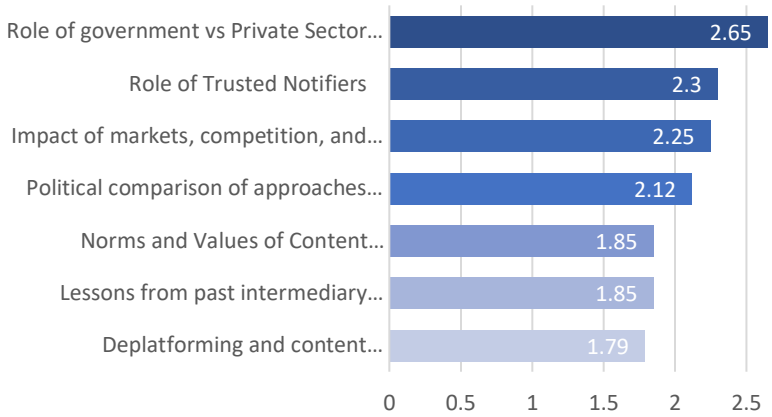
- Not Very Important = 1
- Important = 2
- Essential = 3

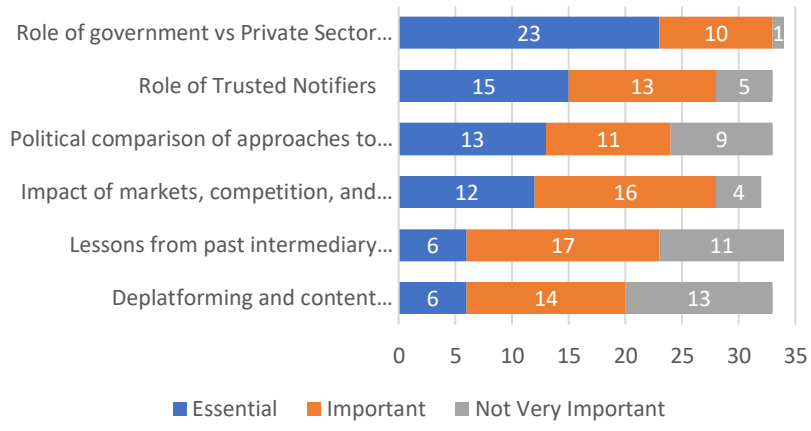


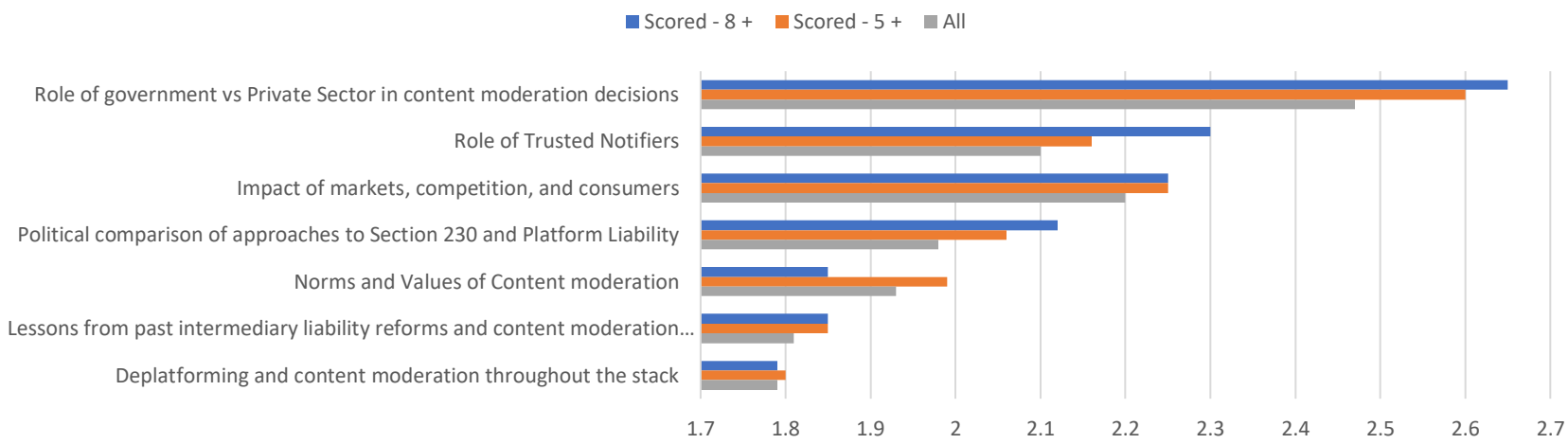










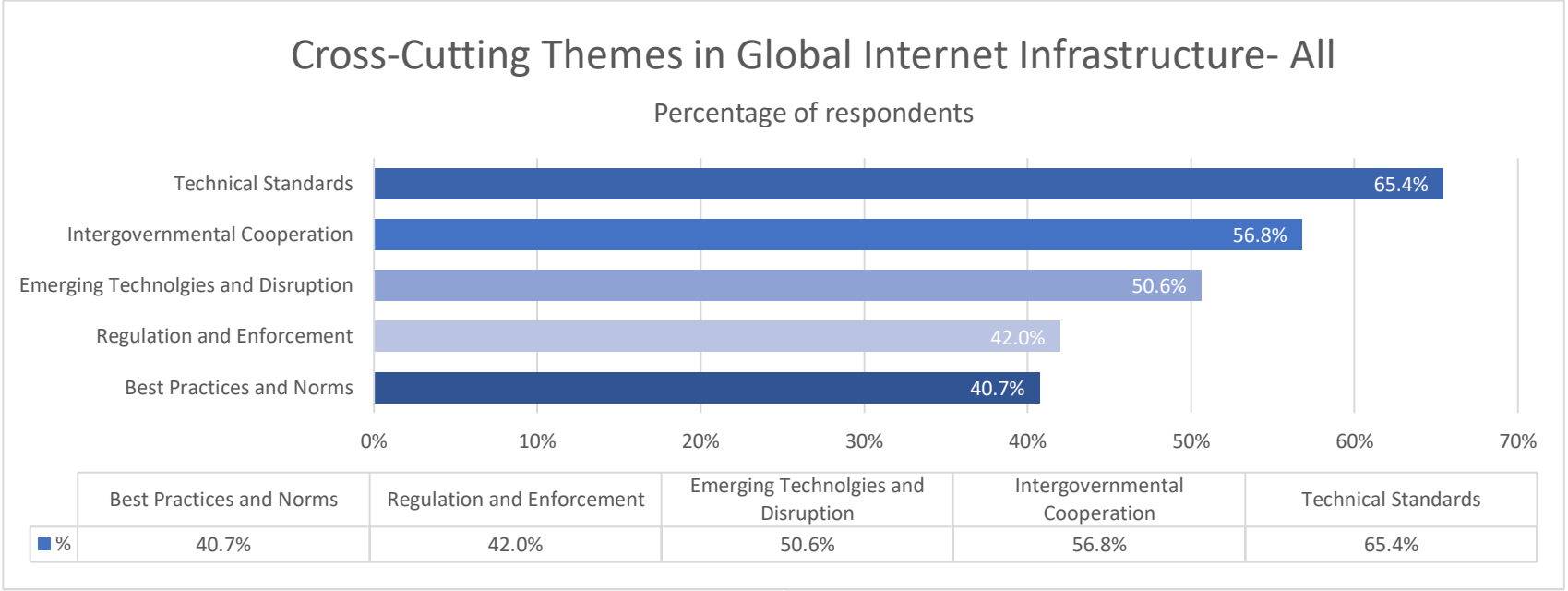


	Deplatforming and content moderation throughout the stack	Lessons from past intermediary liability reforms and content moderation decision	Norms and Values of Content moderation	Political comparison of approaches to Section 230 and Platform Liability	Impact of markets, competition, and consumers	Role of Trusted Notifiers	Role of government vs Private Sector in content moderation decisions
Scored - 8 +	1.79	1.85	1.85	2.12	2.25	2.3	2.65
Scored - 5 +	1.8	1.85	1.99	2.06	2.25	2.16	2.6
All	1.79	1.81	1.93	1.98	2.2	2.1	2.47

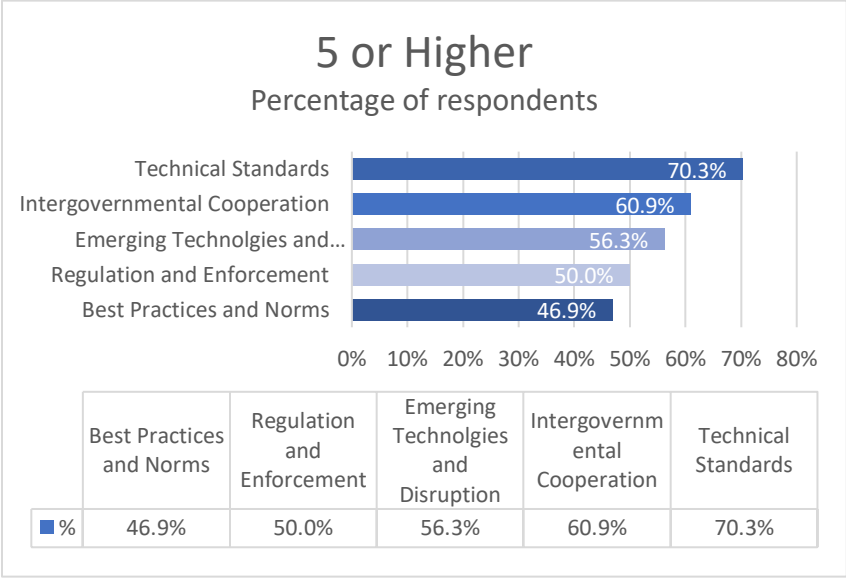
Subject Area Breakdown – Global Internet Infrastructure

Cross-Cutting Themes

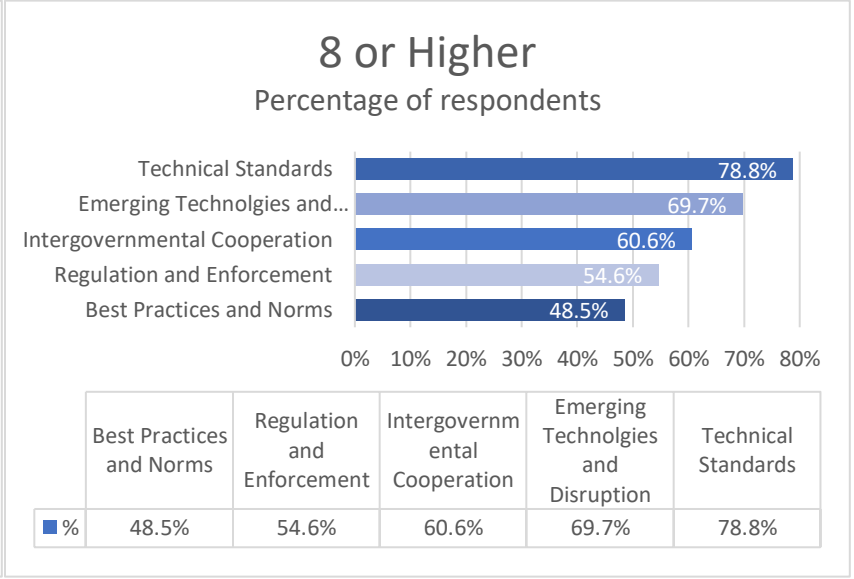
The charts below show the percentage of respondents that selected each theme for the Global Internet Infrastructure Subject Area, based on the rating they gave to Global Internet Infrastructure in Section 3.



	Best Practices and Norms	Regulation and Enforcement	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Technical Standards
%	40.7%	42.0%	50.6%	56.8%	65.4%

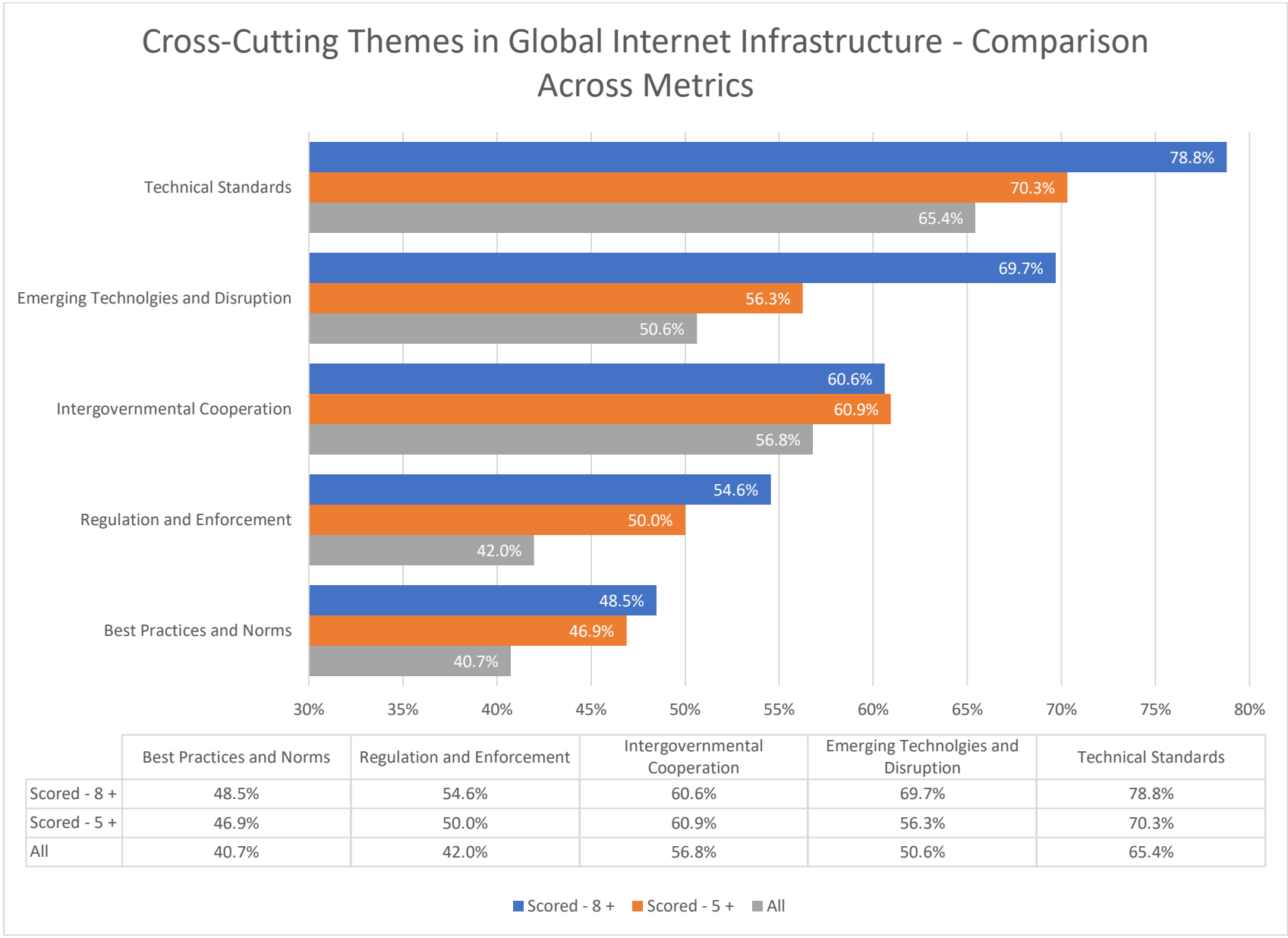


	Best Practices and Norms	Regulation and Enforcement	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Technical Standards
%	46.9%	50.0%	56.3%	60.9%	70.3%



	Best Practices and Norms	Regulation and Enforcement	Intergovernmental Cooperation	Emerging Technolgies and Disruption	Technical Standards
%	48.5%	54.6%	60.6%	69.7%	78.8%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

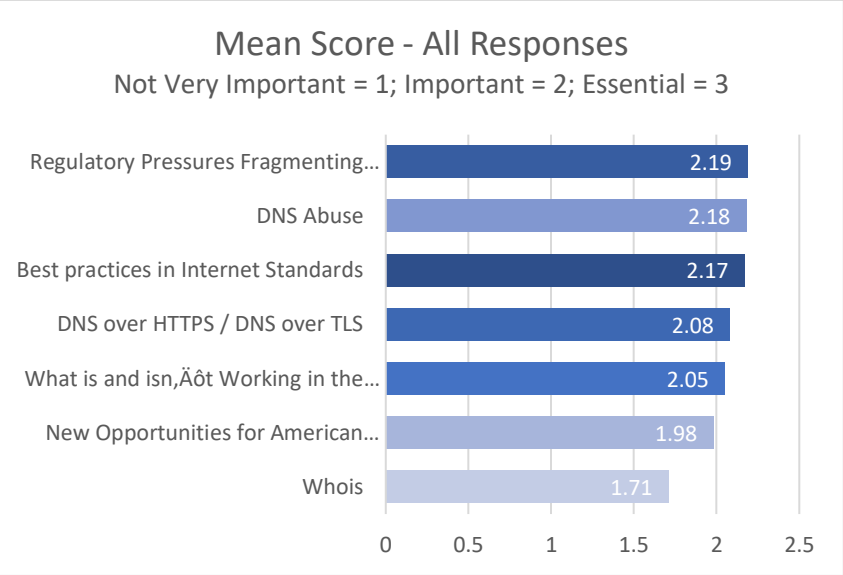


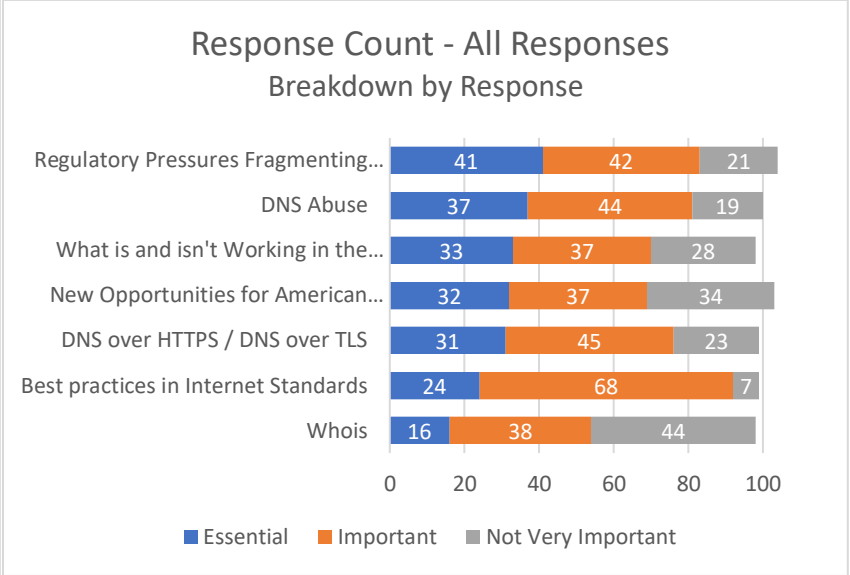
	Best Practices and Norms	Regulation and Enforcement	Intergovernmental Cooperation	Emerging Technolgies and Disruption	Technical Standards
Scored - 8 +	48.5%	54.6%	60.6%	69.7%	78.8%
Scored - 5 +	46.9%	50.0%	60.9%	56.3%	70.3%
All	40.7%	42.0%	56.8%	50.6%	65.4%

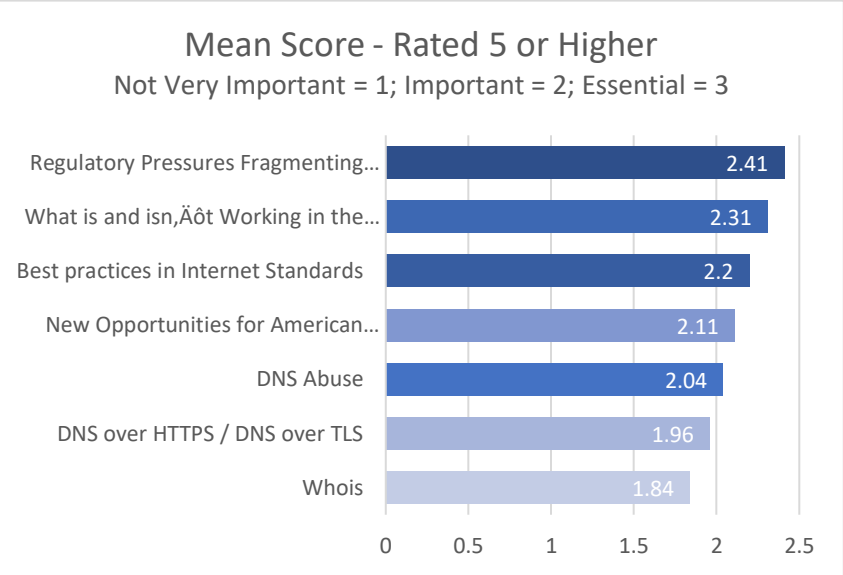
Global Internet Infrastructure Topics

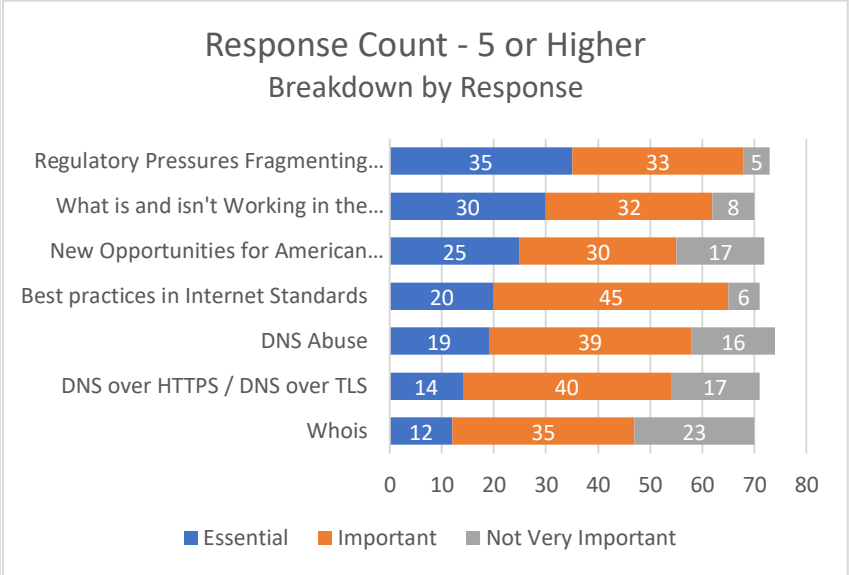
The charts below show the mean scores and response counts for each option, based on the rating they gave to Global Internet Infrastructure in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

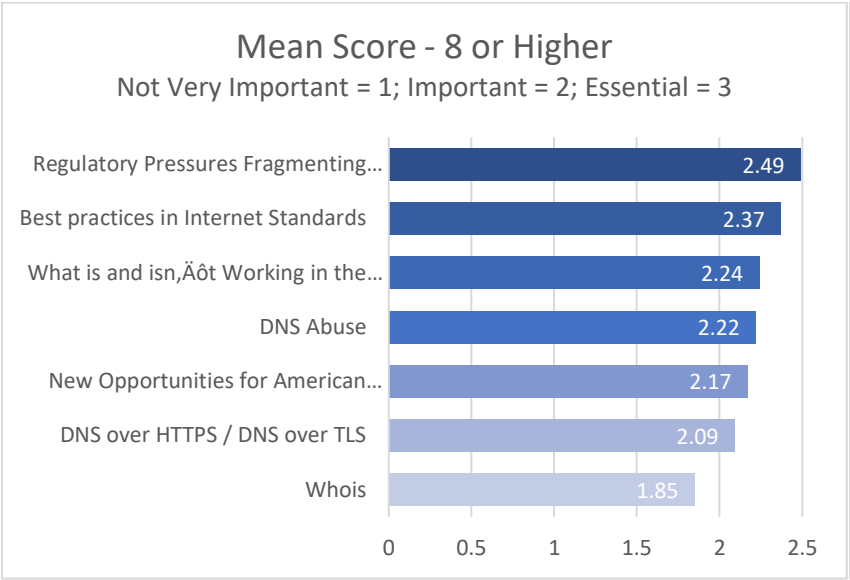
- Not Very Important = 1
- Important = 2
- Essential = 3

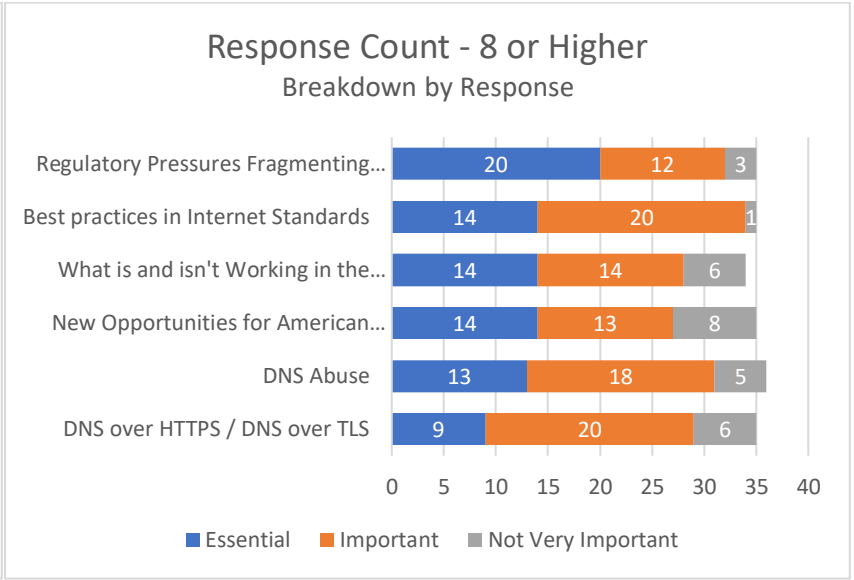


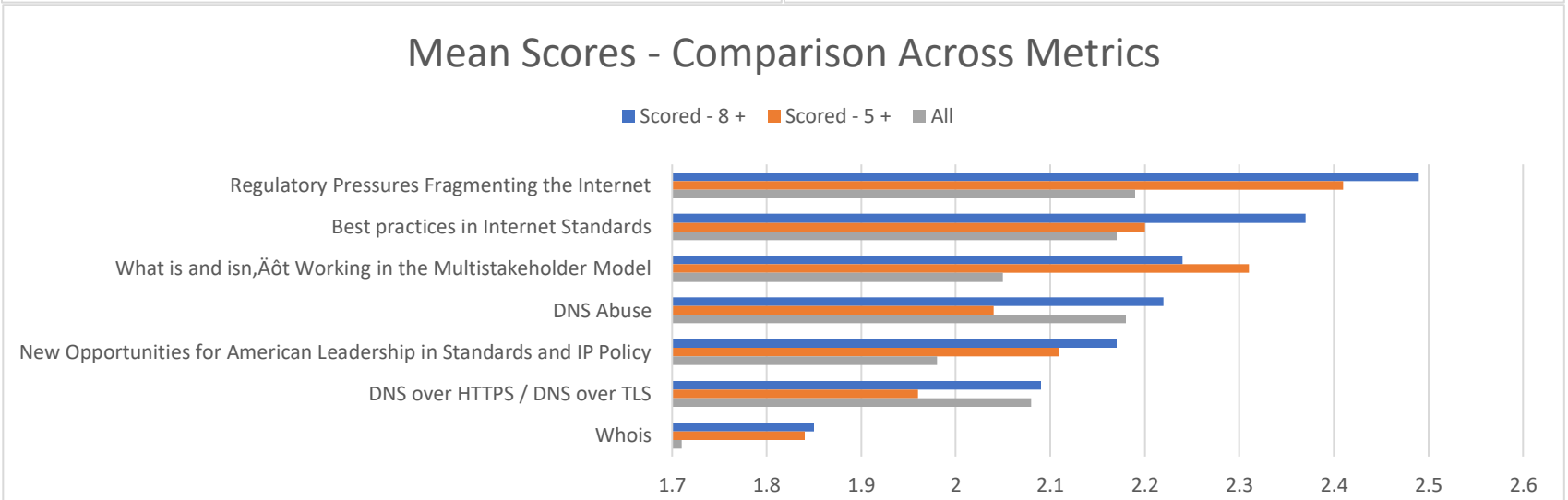










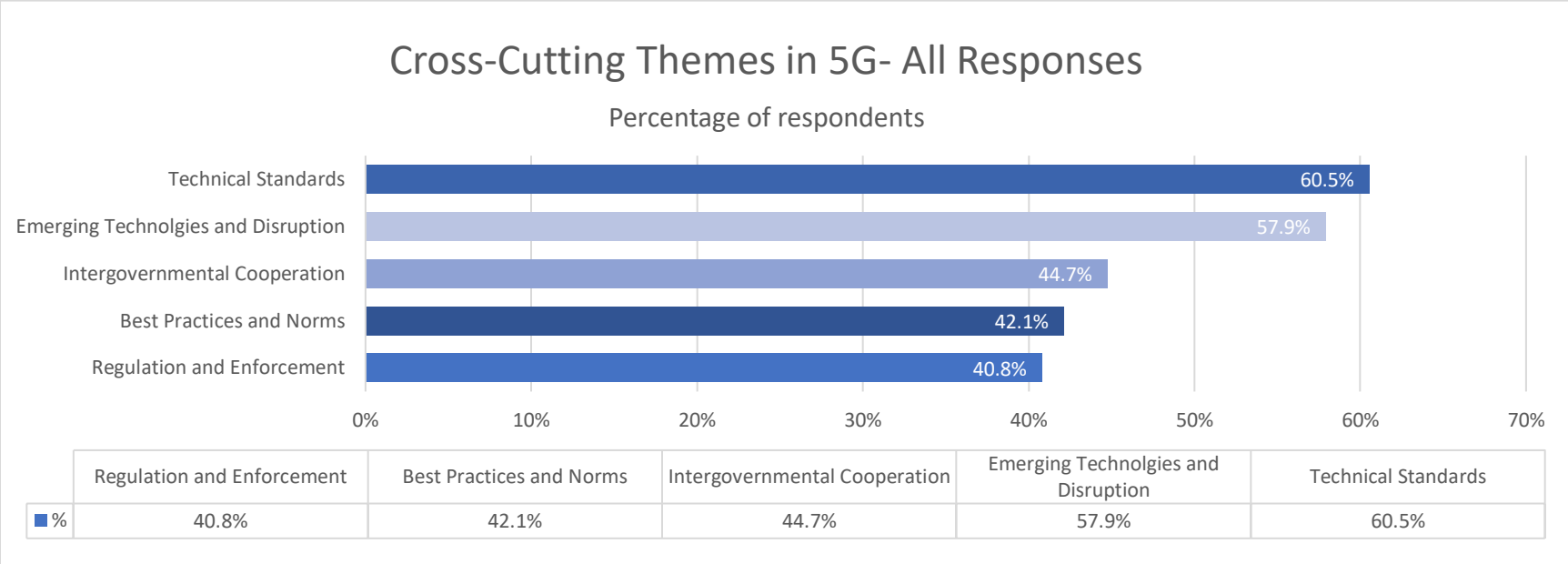


	Whois	DNS over HTTPS / DNS over TLS	New Opportunities for American Leadership in Standards and IP Policy	DNS Abuse	What is and isn,Äôt Working in the Multistakeholder Model	Best practices in Internet Standards	Regulatory Pressures Fragmenting the Internet
Scored - 8 +	1.85	2.09	2.17	2.22	2.24	2.37	2.49
Scored - 5 +	1.84	1.96	2.11	2.04	2.31	2.2	2.41
All	1.71	2.08	1.98	2.18	2.05	2.17	2.19

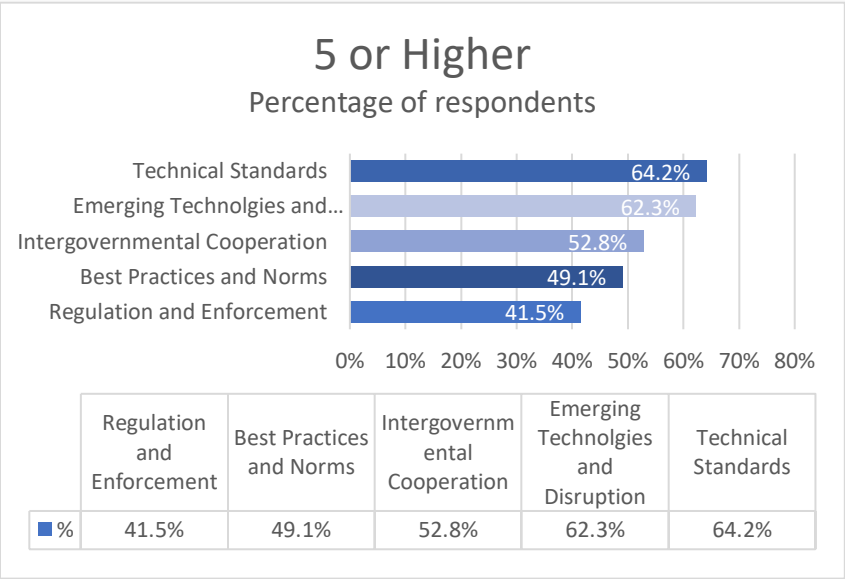
Subject Area Breakdown – 5G

Cross-Cutting Themes

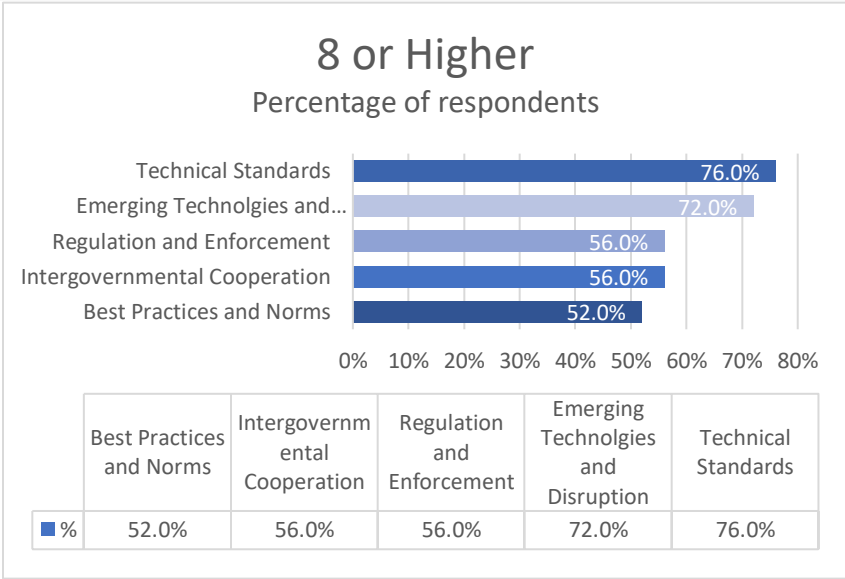
The charts below show the percentage of respondents that selected each theme for the 5G Subject Area, based on the rating they gave to 5G in Section 3.



	Regulation and Enforcement	Best Practices and Norms	Intergovernmental Cooperation	Emerging Technolgies and Disruption	Technical Standards
%	40.8%	42.1%	44.7%	57.9%	60.5%

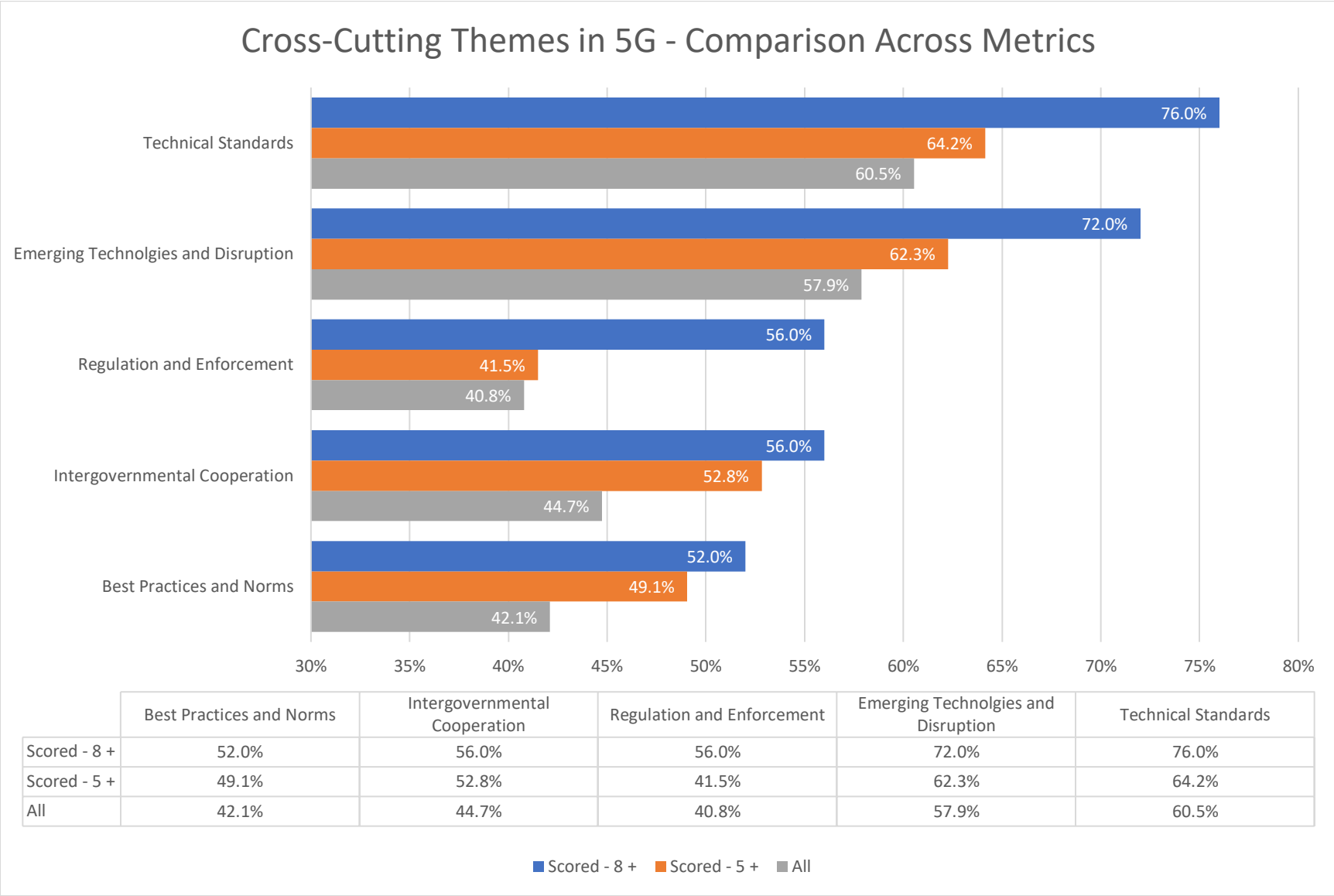


	Regulation and Enforcement	Best Practices and Norms	Intergovernmental Cooperation	Emerging Technolgies and Disruption	Technical Standards
%	41.5%	49.1%	52.8%	62.3%	64.2%



	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement	Emerging Technolgies and Disruption	Technical Standards
%	52.0%	56.0%	56.0%	72.0%	76.0%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

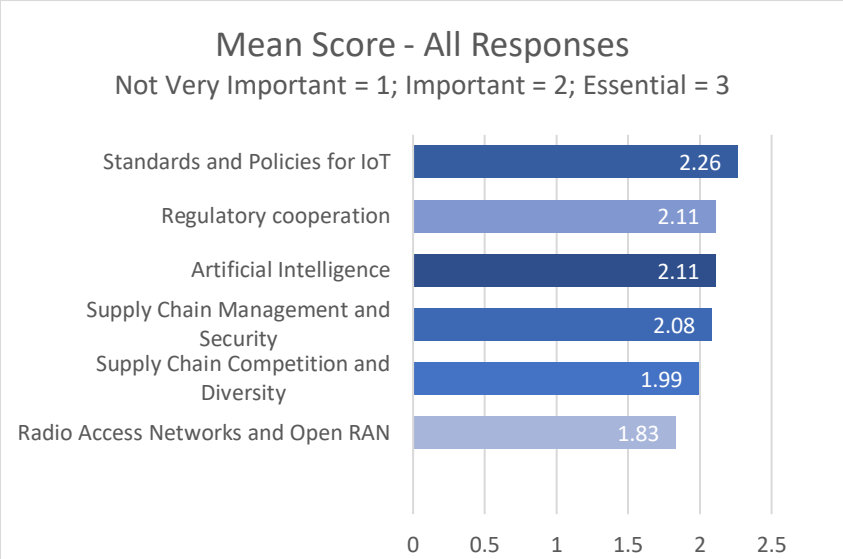


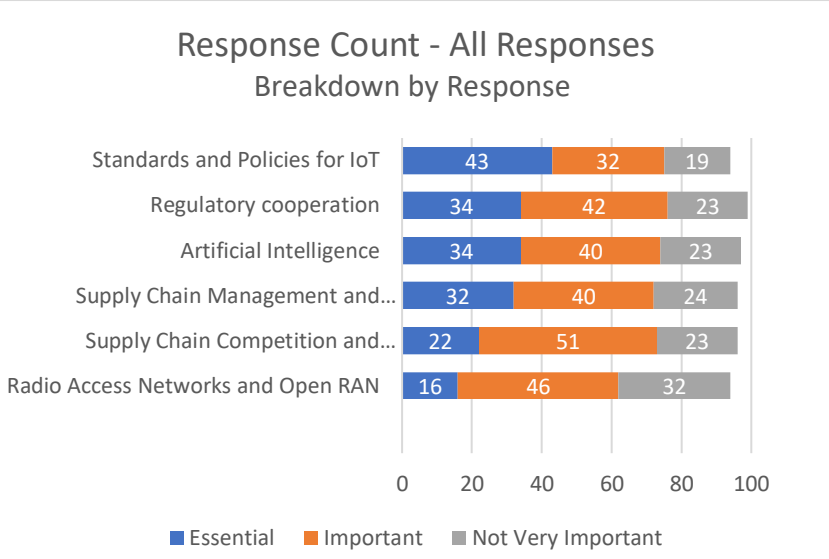
	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement	Emerging Technolgies and Disruption	Technical Standards
Scored - 8 +	52.0%	56.0%	56.0%	72.0%	76.0%
Scored - 5 +	49.1%	52.8%	41.5%	62.3%	64.2%
All	42.1%	44.7%	40.8%	57.9%	60.5%

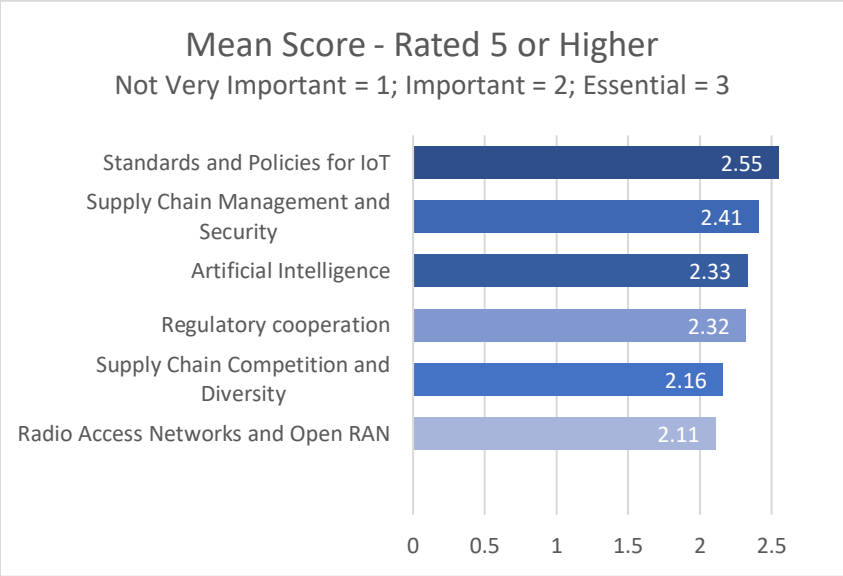
5G Topics

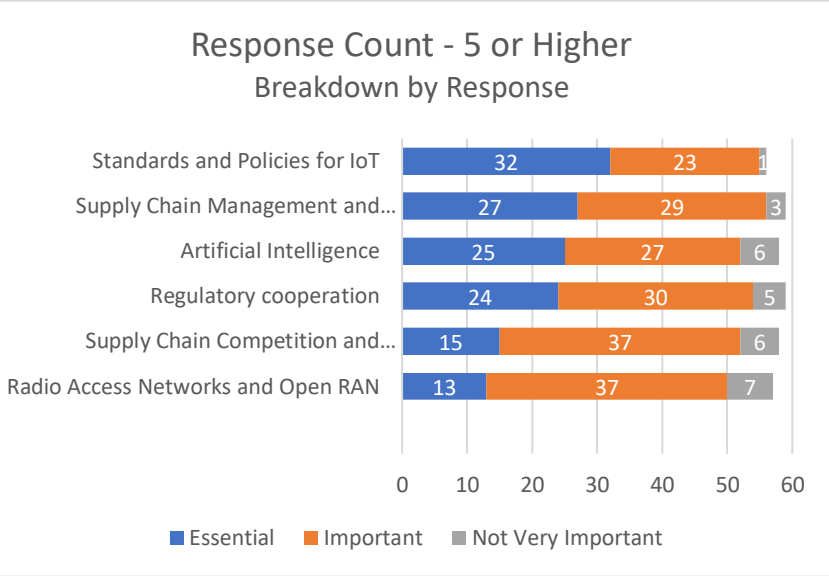
The charts below show the mean scores and response counts for each option, based on the rating they gave to 5G in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

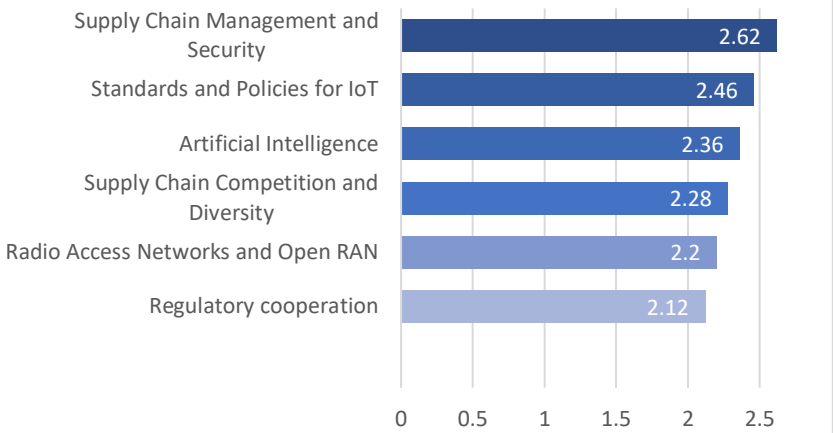
- Not Very Important = 1
- Important = 2
- Essential = 3

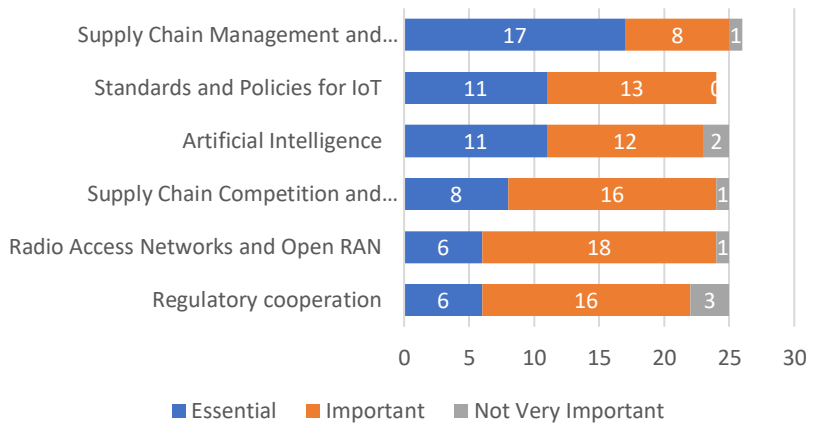


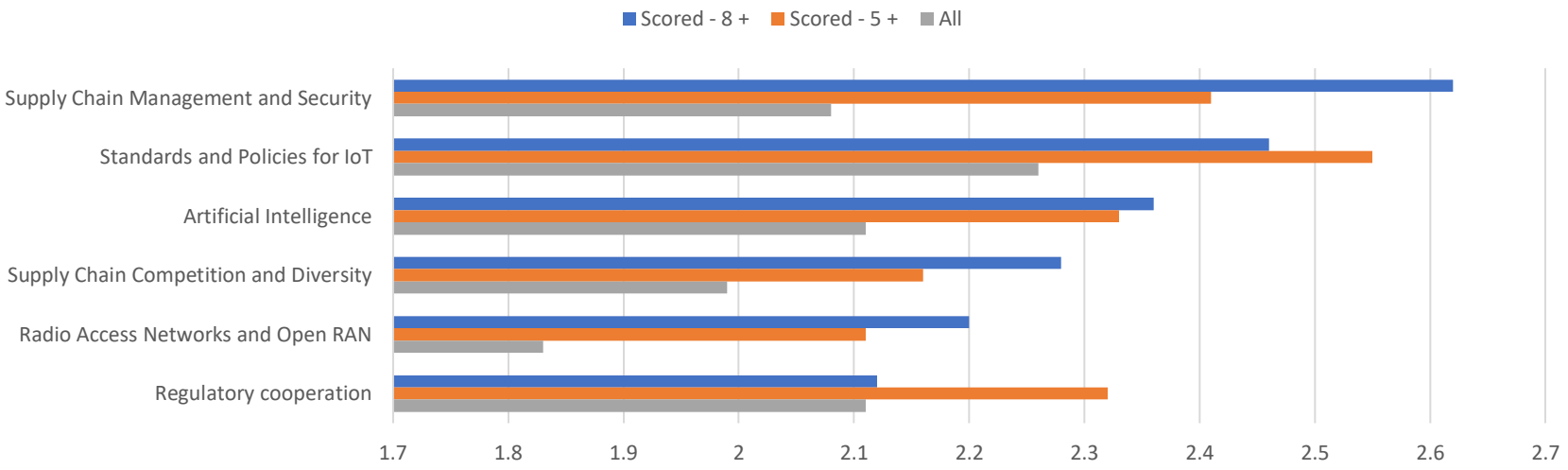










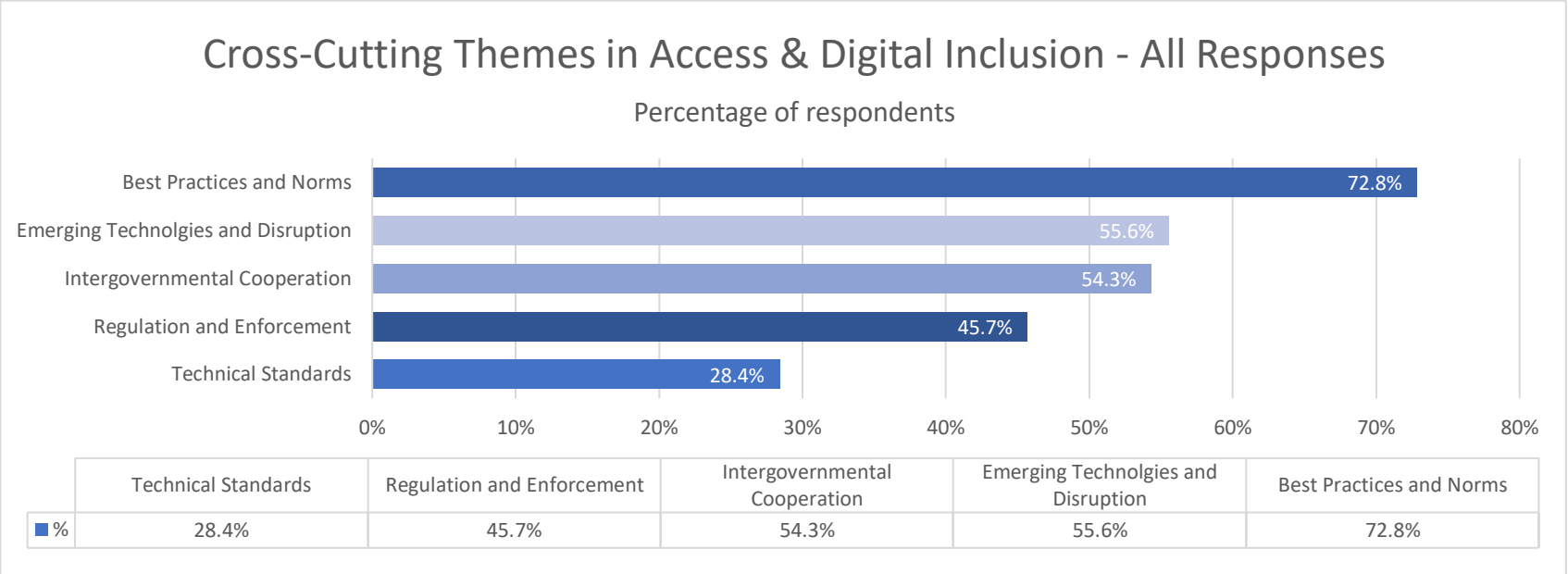


	Regulatory cooperation	Radio Access Networks and Open RAN	Supply Chain Competition and Diversity	Artificial Intelligence	Standards and Policies for IoT	Supply Chain Management and Security
Scored - 8 +	2.12	2.2	2.28	2.36	2.46	2.62
Scored - 5 +	2.32	2.11	2.16	2.33	2.55	2.41
All	2.11	1.83	1.99	2.11	2.26	2.08

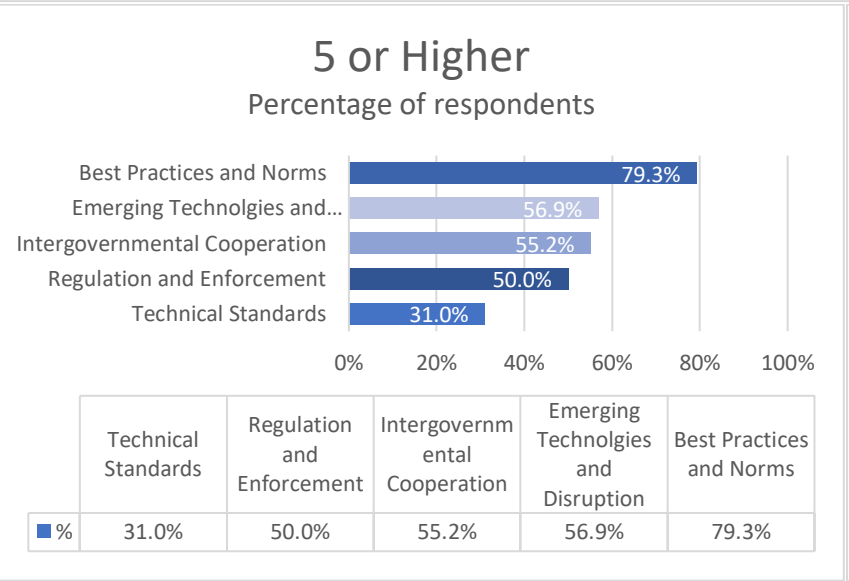
Subject Area Breakdown – Access & Digital Inclusion

Cross-Cutting Themes

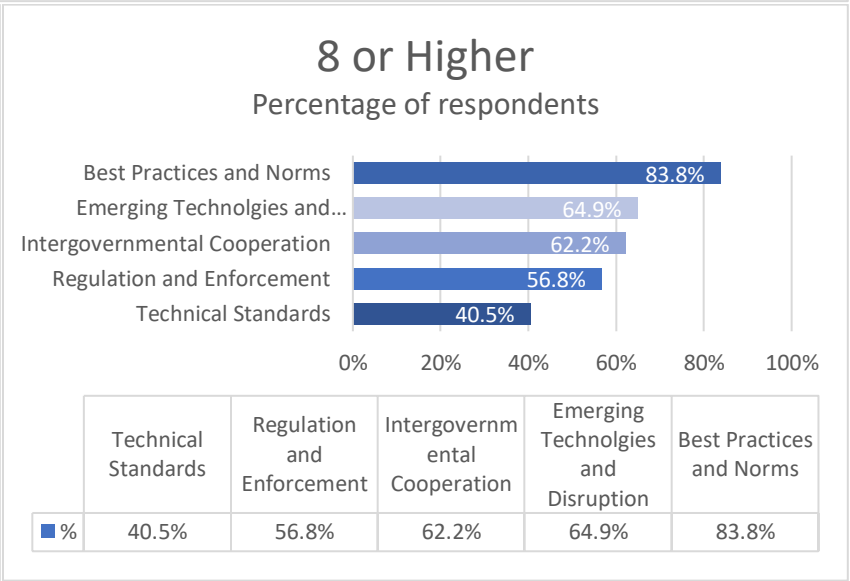
The charts below show the percentage of respondents that selected each theme for the Access & Digital Inclusion Subject Area, based on the rating they gave to Access & Digital Inclusion in Section 3.



	Technical Standards	Regulation and Enforcement	Intergovernmental Cooperation	Emerging Technolgies and Disruption	Best Practices and Norms
%	28.4%	45.7%	54.3%	55.6%	72.8%

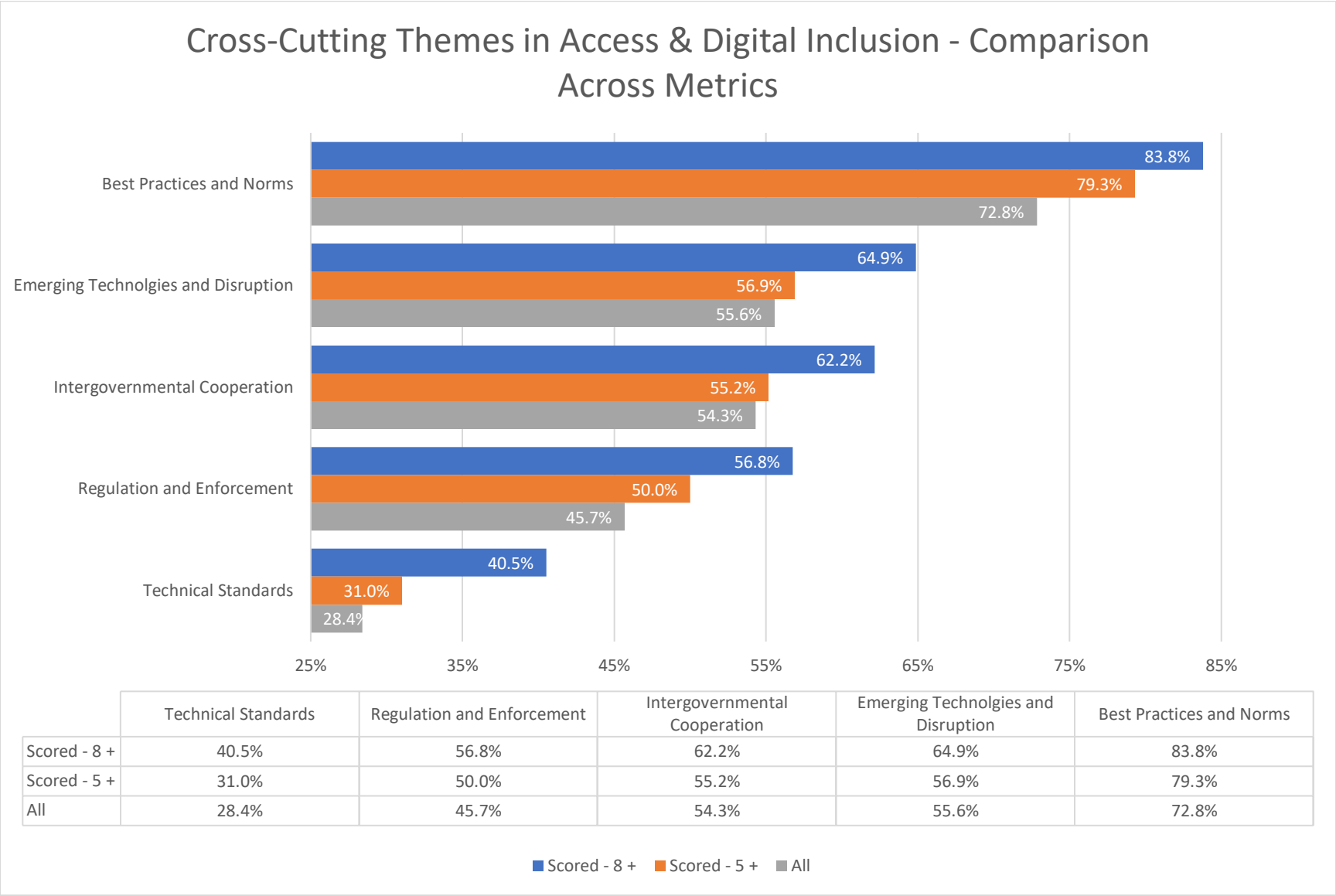


	Technical Standards	Regulation and Enforcement	Intergovernmental Cooperation	Emerging Technolgies and Disruption	Best Practices and Norms
%	31.0%	50.0%	55.2%	56.9%	79.3%



	Technical Standards	Regulation and Enforcement	Intergovernmental Cooperation	Emerging Technolgies and Disruption	Best Practices and Norms
%	40.5%	56.8%	62.2%	64.9%	83.8%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

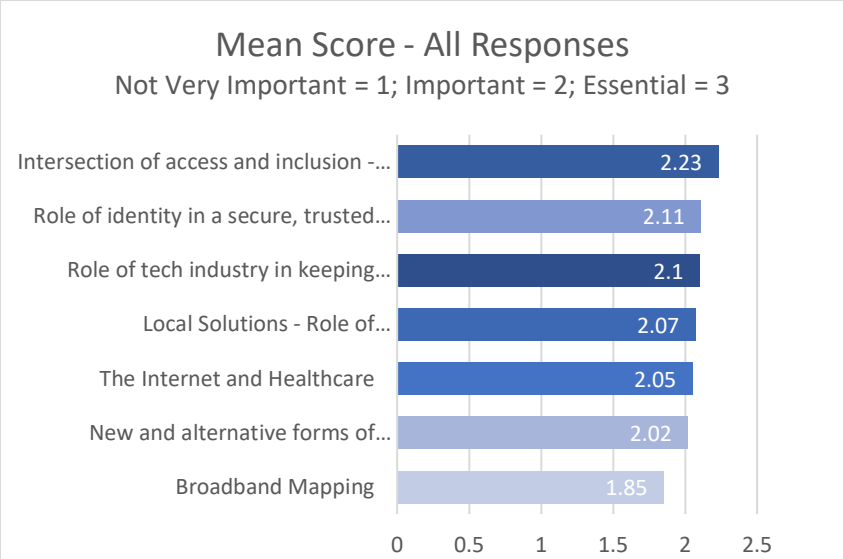


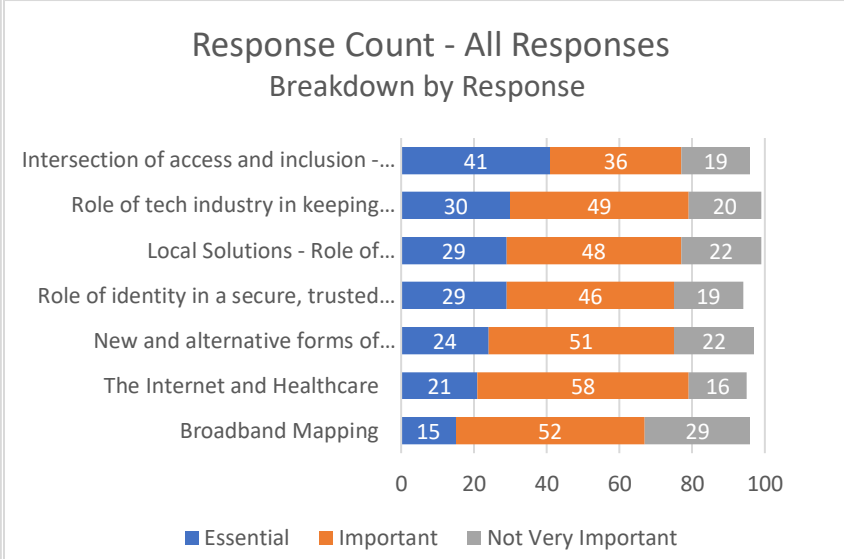
	Technical Standards	Regulation and Enforcement	Intergovernmental Cooperation	Emerging Technolgies and Disruption	Best Practices and Norms
Scored - 8 +	40.5%	56.8%	62.2%	64.9%	83.8%
Scored - 5 +	31.0%	50.0%	55.2%	56.9%	79.3%
All	28.4%	45.7%	54.3%	55.6%	72.8%

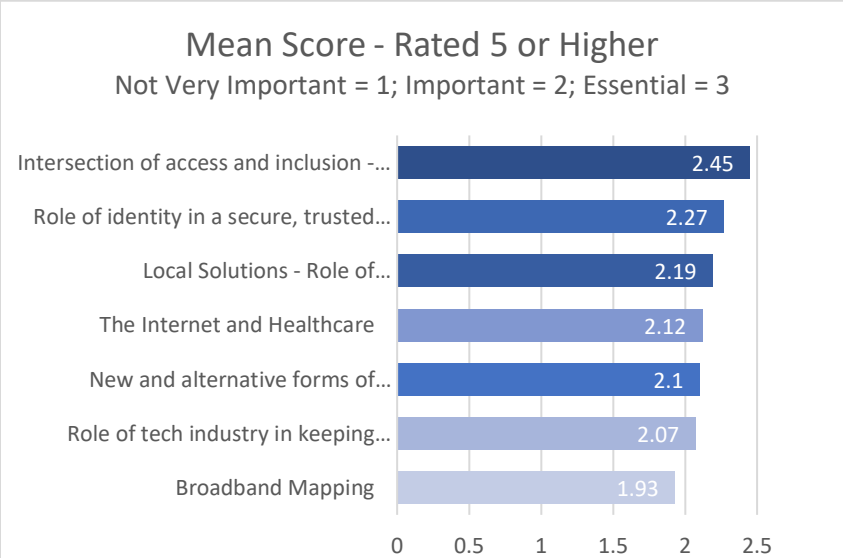
Access & Digital Inclusion Topics

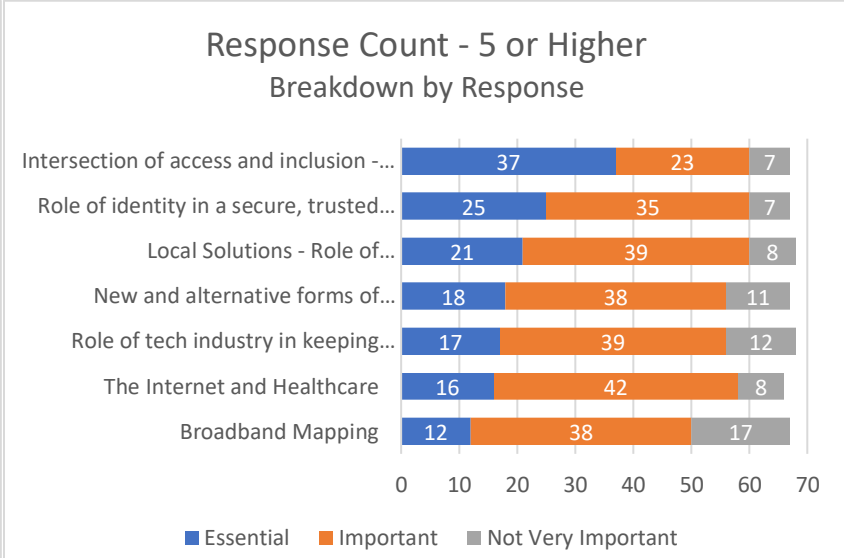
The charts below show the mean scores and response counts for each option, based on the rating they gave to Access & Digital Inclusion in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

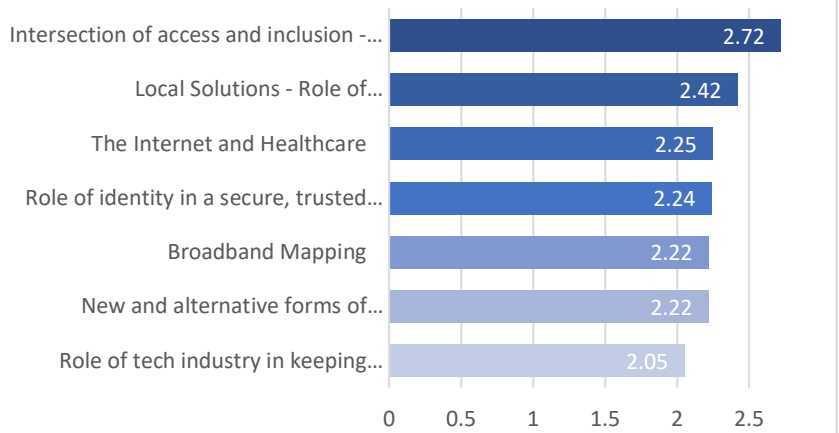
- Not Very Important = 1
- Important = 2
- Essential = 3

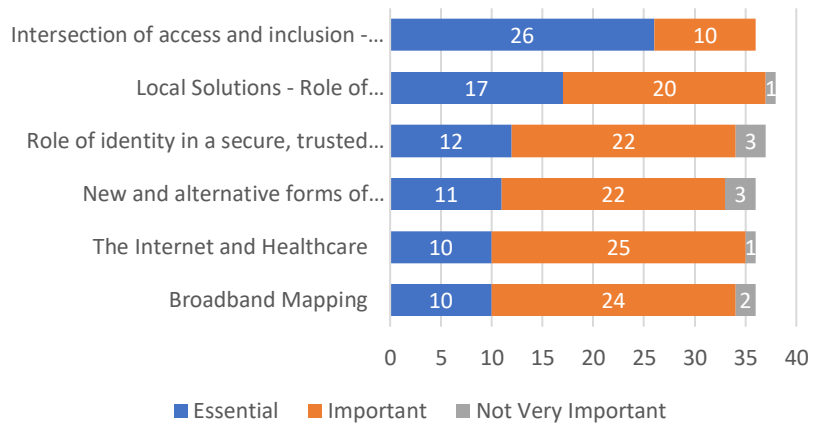


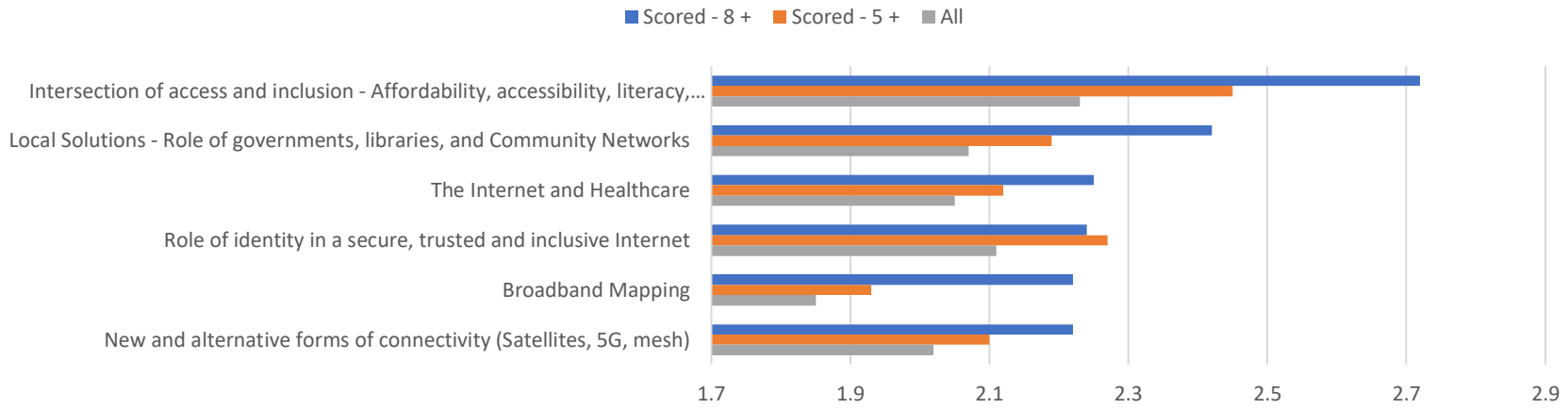










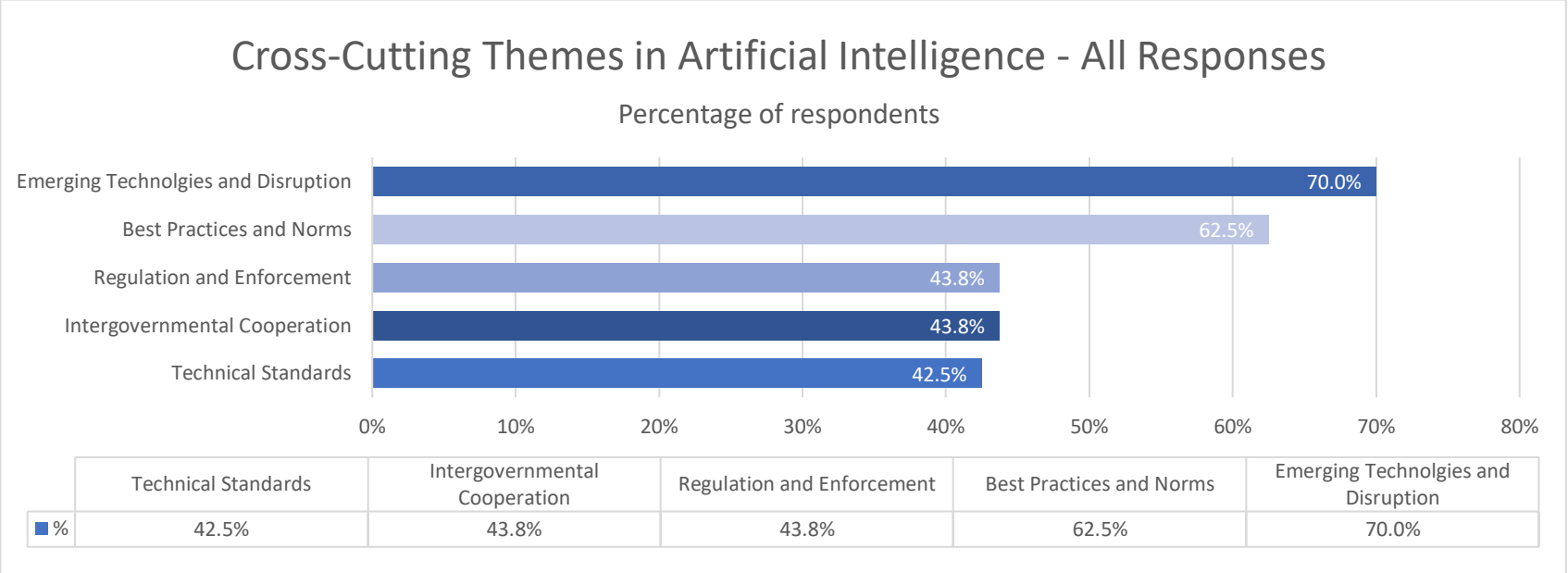


	New and alternative forms of connectivity (Satellites, 5G, mesh)	Broadband Mapping	Role of identity in a secure, trusted and inclusive Internet	The Internet and Healthcare	Local Solutions - Role of governments, libraries, and Community Networks	Intersection of access and inclusion - Affordability, accessibility, literacy, economic opportunity
Scored - 8 +	2.22	2.22	2.24	2.25	2.42	2.72
Scored - 5 +	2.1	1.93	2.27	2.12	2.19	2.45
All	2.02	1.85	2.11	2.05	2.07	2.23

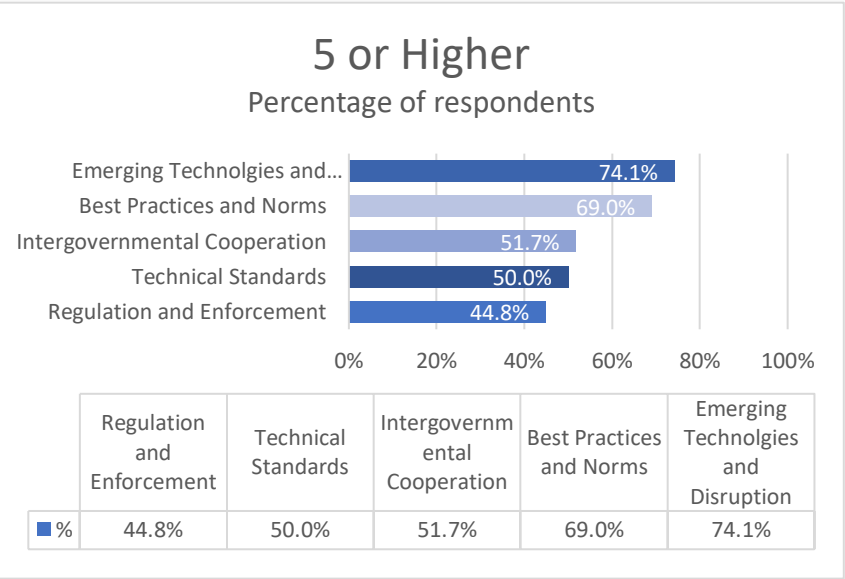
Subject Area Breakdown – Artificial Intelligence

Cross-Cutting Themes

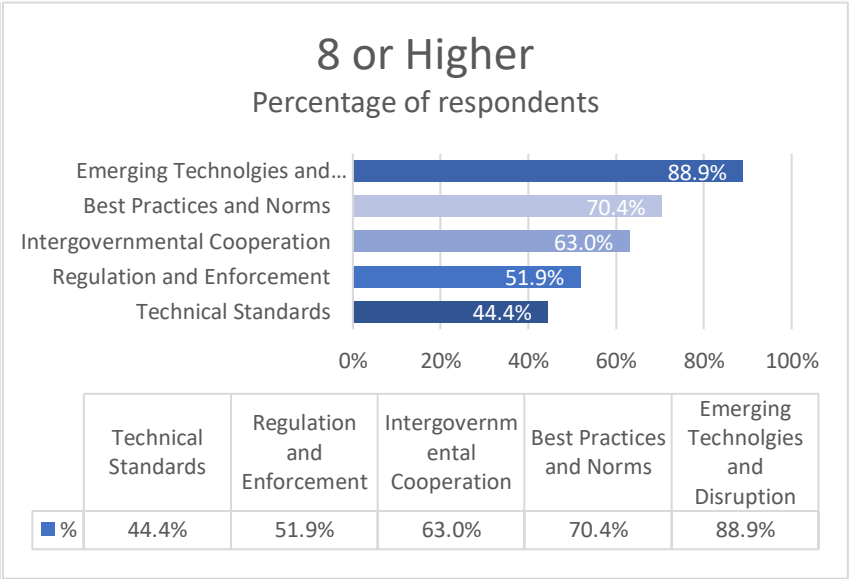
The charts below show the percentage of respondents that selected each theme for the Artificial Intelligence Subject Area, based on the rating they gave to Artificial Intelligence in Section 3.



	Technical Standards	Intergovernmental Cooperation	Regulation and Enforcement	Best Practices and Norms	Emerging Technolgies and Disruption
%	42.5%	43.8%	43.8%	62.5%	70.0%

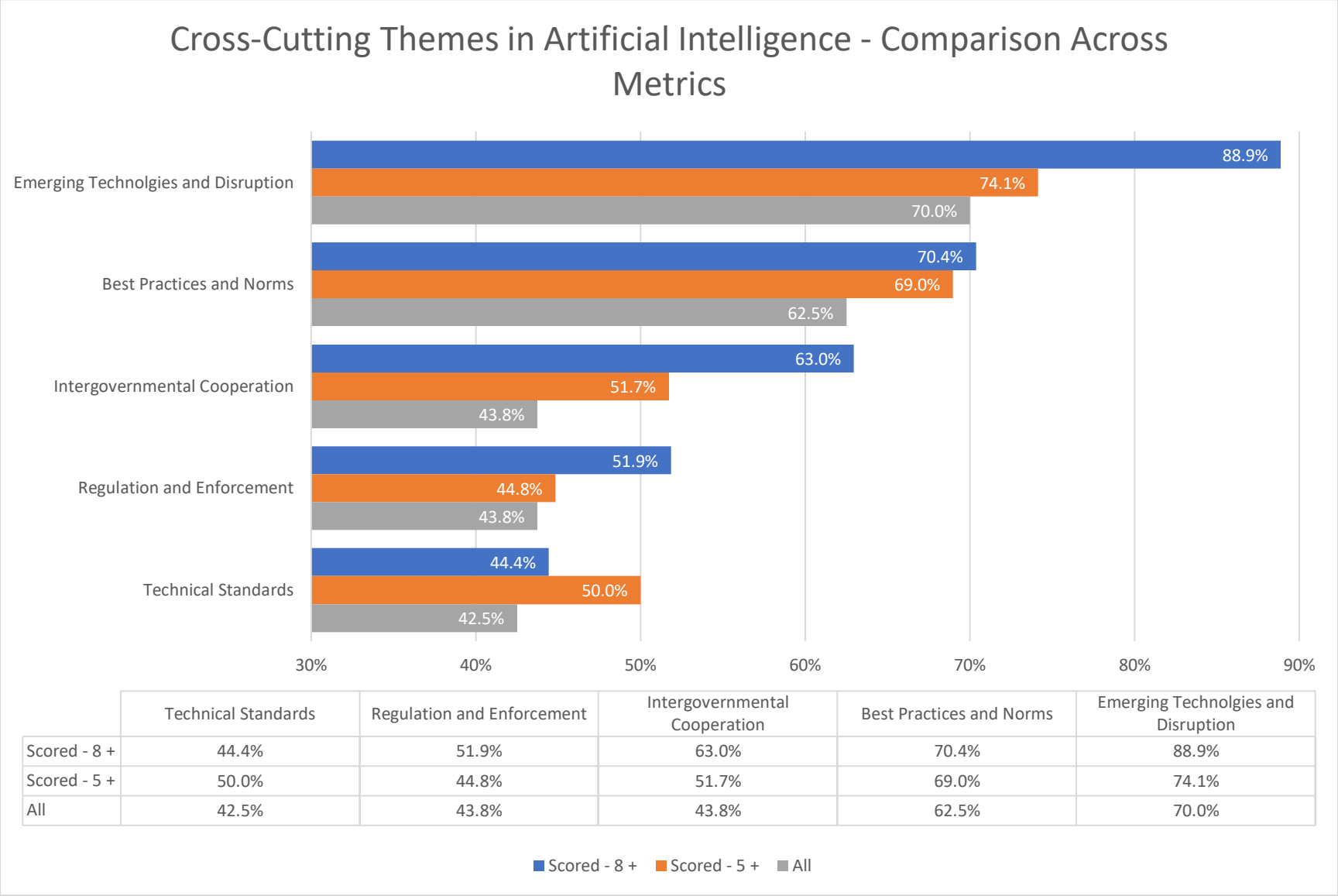


	Regulation and Enforcement	Technical Standards	Intergovernmental Cooperation	Best Practices and Norms	Emerging Technolgies and Disruption
%	44.8%	50.0%	51.7%	69.0%	74.1%



	Technical Standards	Regulation and Enforcement	Intergovernmental Cooperation	Best Practices and Norms	Emerging Technolgies and Disruption
%	44.4%	51.9%	63.0%	70.4%	88.9%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

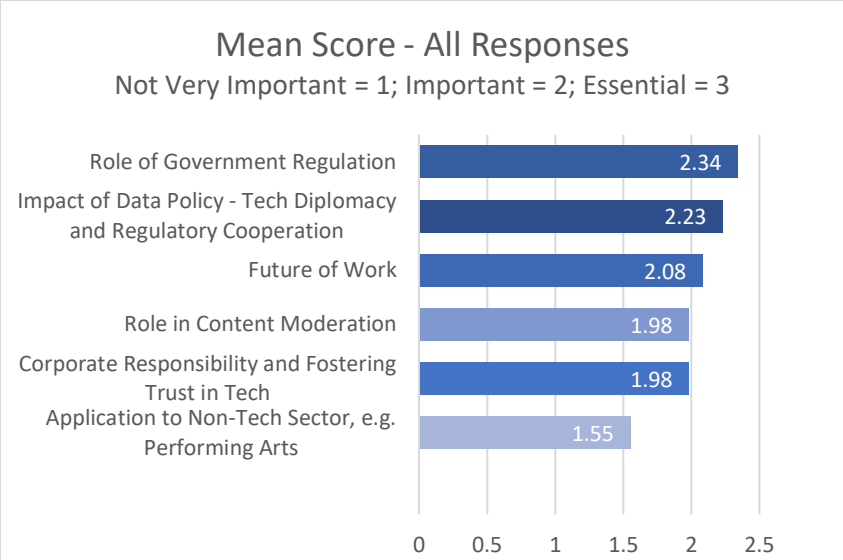


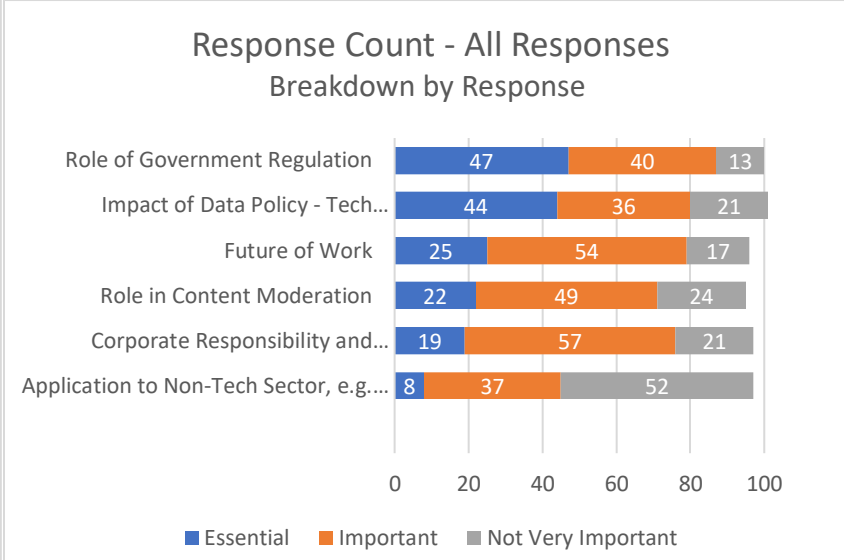
	Technical Standards	Regulation and Enforcement	Intergovernmental Cooperation	Best Practices and Norms	Emerging Technolgies and Disruption
Scored - 8 +	44.4%	51.9%	63.0%	70.4%	88.9%
Scored - 5 +	50.0%	44.8%	51.7%	69.0%	74.1%
All	42.5%	43.8%	43.8%	62.5%	70.0%

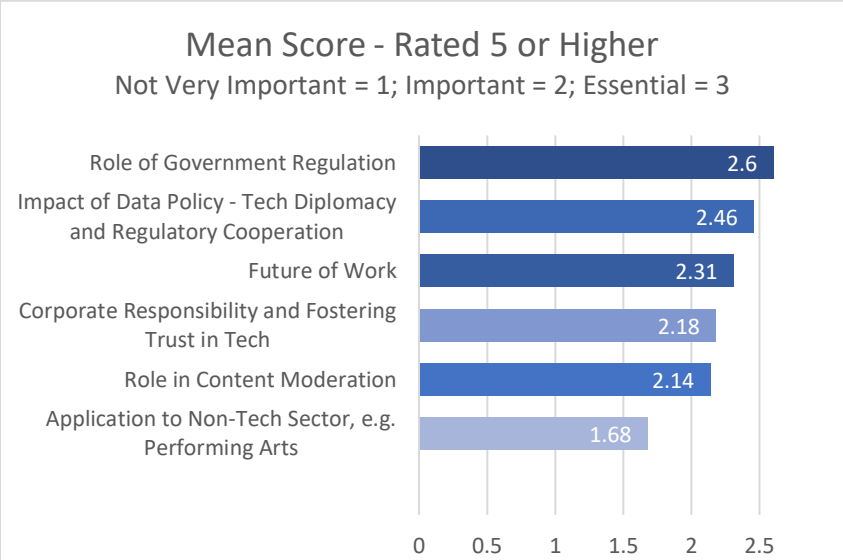
Artificial Intelligence Topics

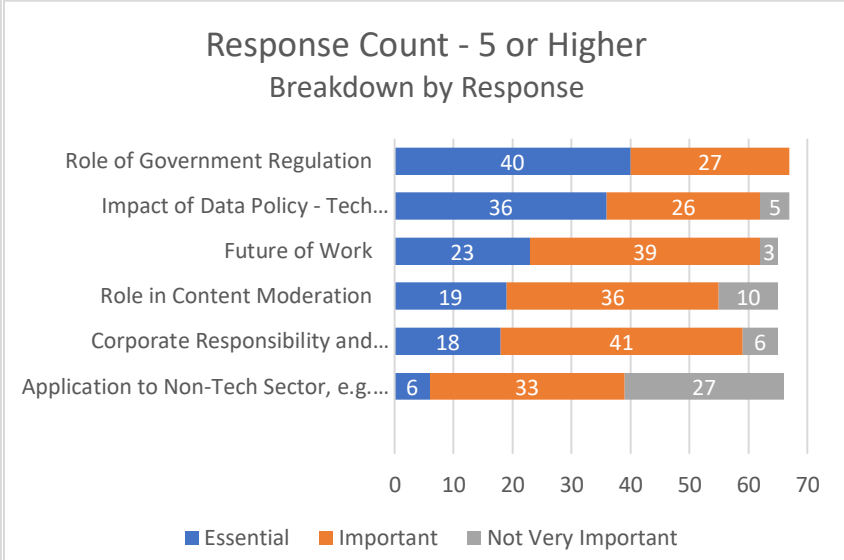
The charts below show the mean scores and response counts for each option, based on the rating they gave to Artificial Intelligence in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

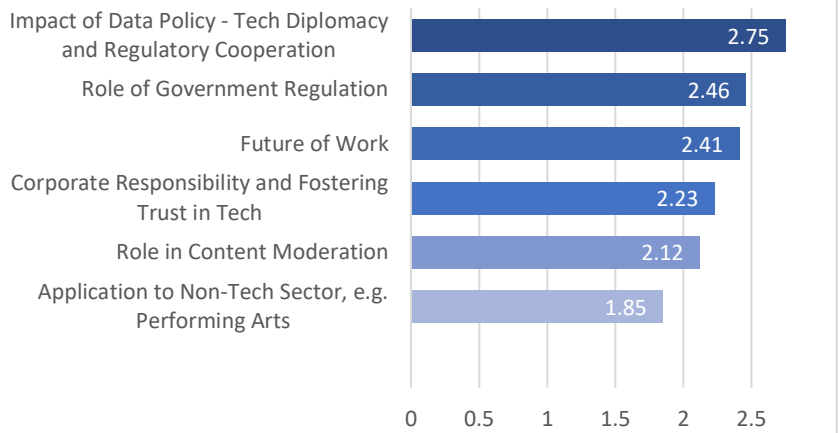
- Not Very Important = 1
- Important = 2
- Essential = 3

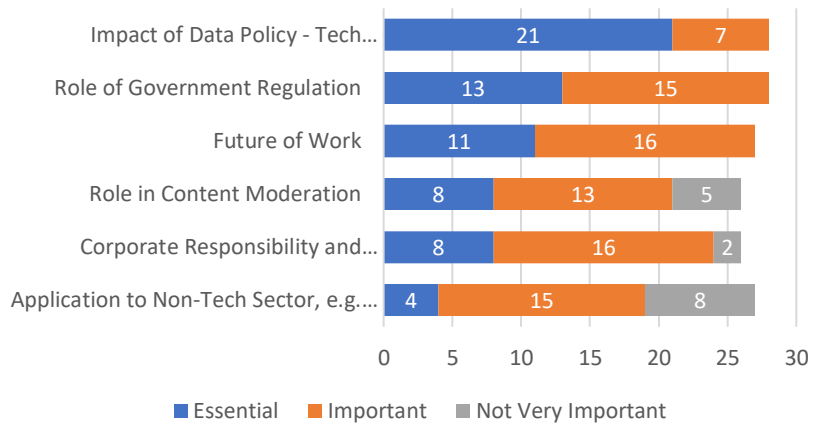


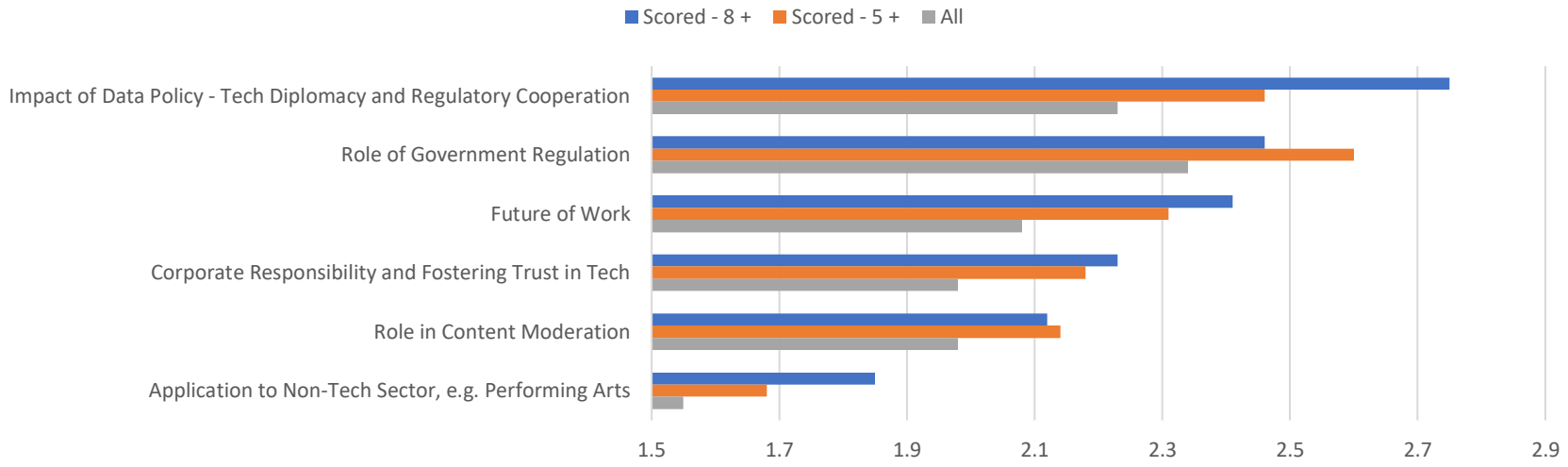










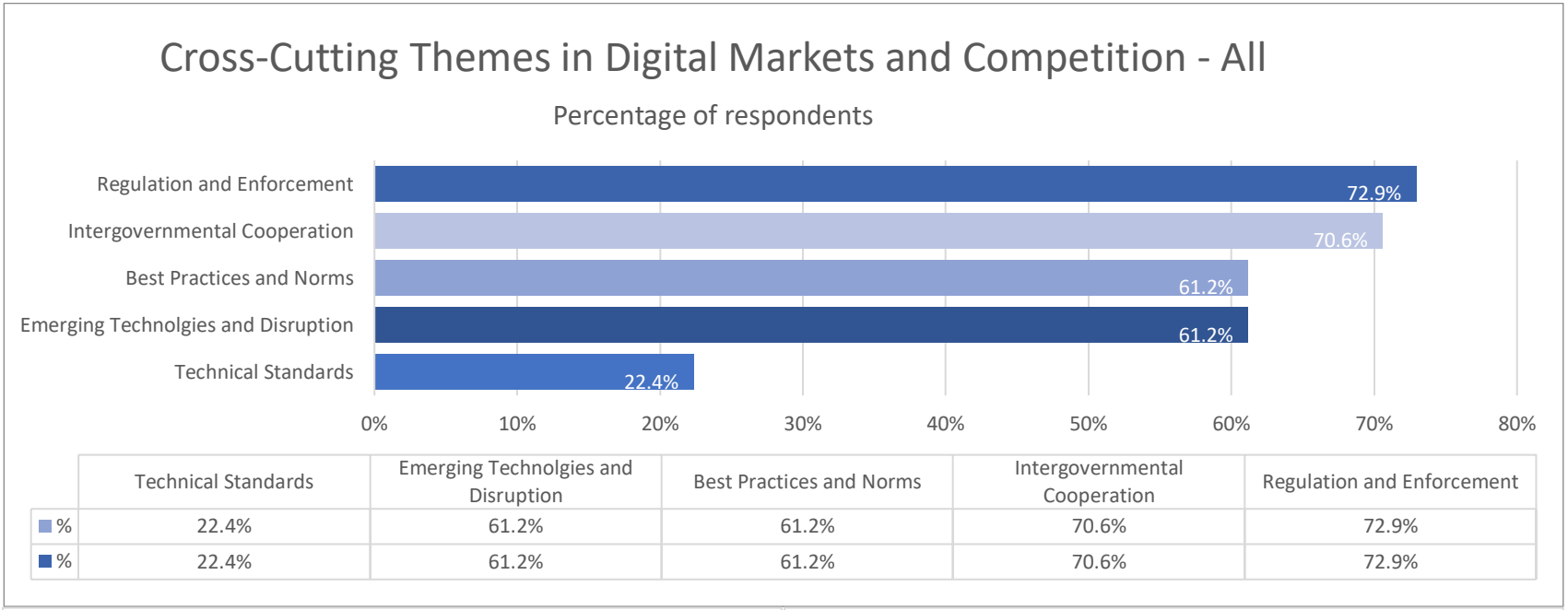


	Application to Non-Tech Sector, e.g. Performing Arts	Role in Content Moderation	Corporate Responsibility and Fostering Trust in Tech	Future of Work	Role of Government Regulation	Impact of Data Policy - Tech Diplomacy and Regulatory Cooperation
Scored - 8 +	1.85	2.12	2.23	2.41	2.46	2.75
Scored - 5 +	1.68	2.14	2.18	2.31	2.6	2.46
All	1.55	1.98	1.98	2.08	2.34	2.23

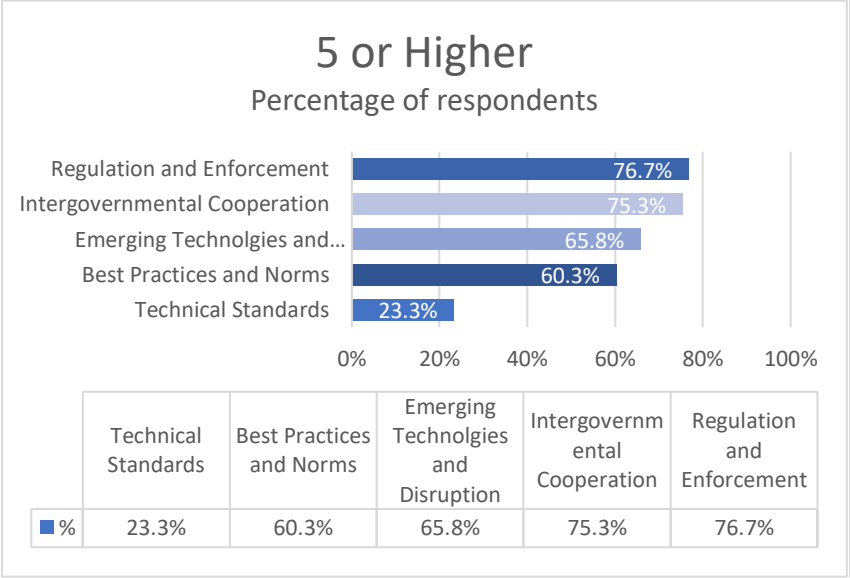
Subject Area Breakdown – Digital Market and Competition

Cross-Cutting Themes

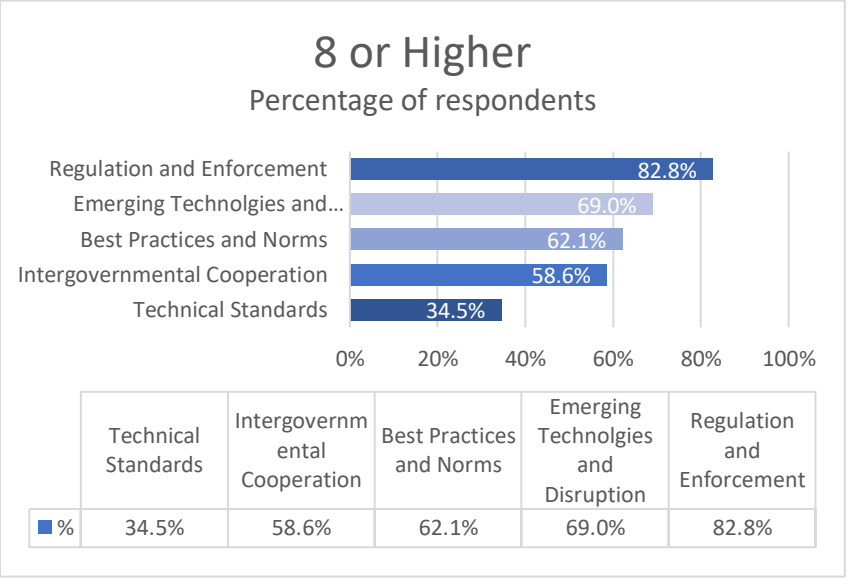
The charts below show the percentage of respondents that selected each theme for the Digital Market and Competition Subject Area, based on the rating they gave to Trust in Section 3.



	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation	Regulation and Enforcement
%	22.4%	61.2%	61.2%	70.6%	72.9%
%	22.4%	61.2%	61.2%	70.6%	72.9%

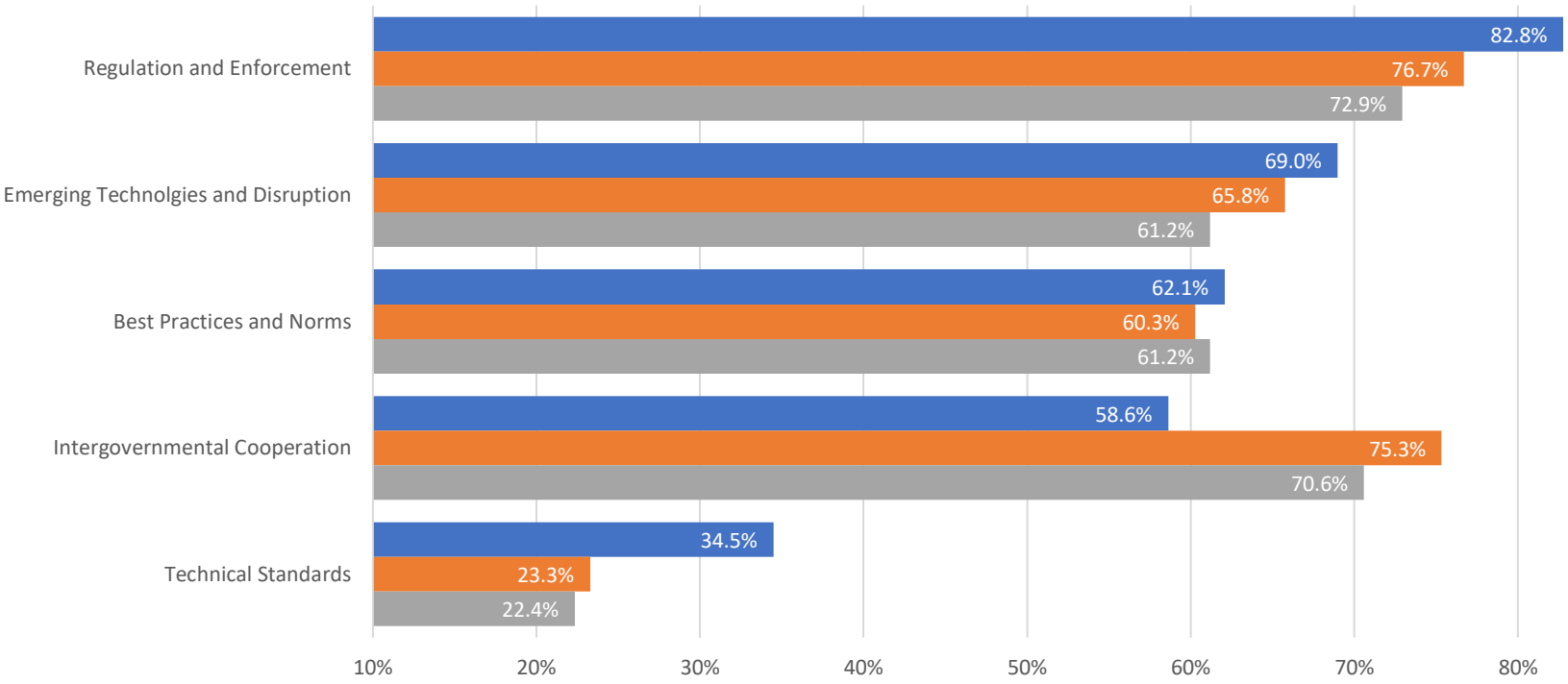


	Technical Standards	Best Practices and Norms	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Regulation and Enforcement
%	23.3%	60.3%	65.8%	75.3%	76.7%



	Technical Standards	Intergovernmental Cooperation	Best Practices and Norms	Emerging Technolgies and Disruption	Regulation and Enforcement
%	34.5%	58.6%	62.1%	69.0%	82.8%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

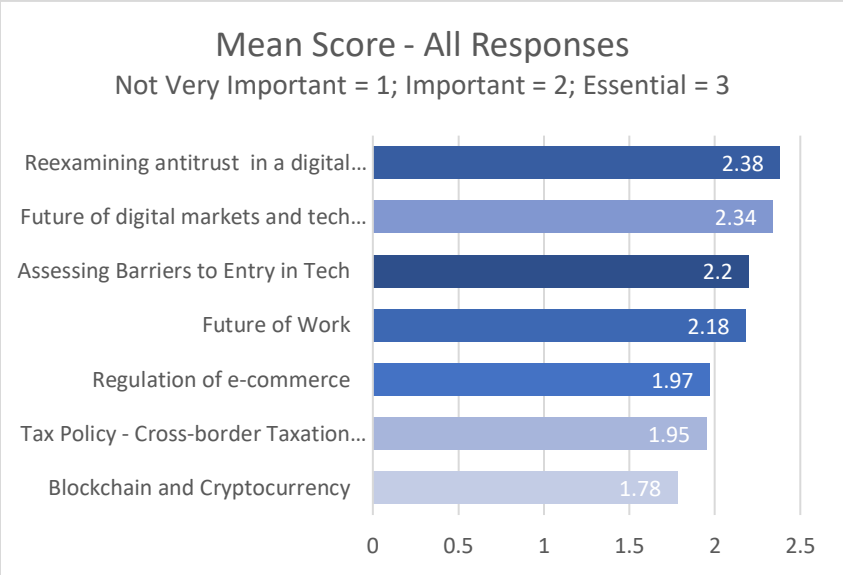


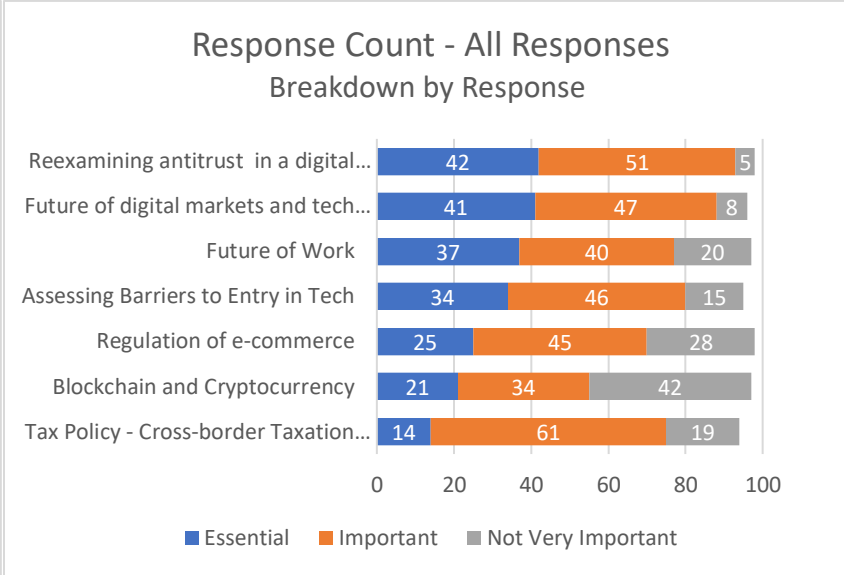
	Technical Standards	Intergovernmental Cooperation	Best Practices and Norms	Emerging Technolgies and Disruption	Regulation and Enforcement
Scored - 8 +	34.5%	58.6%	62.1%	69.0%	82.8%
Scored - 5 +	23.3%	75.3%	60.3%	65.8%	76.7%
All	22.4%	70.6%	61.2%	61.2%	72.9%

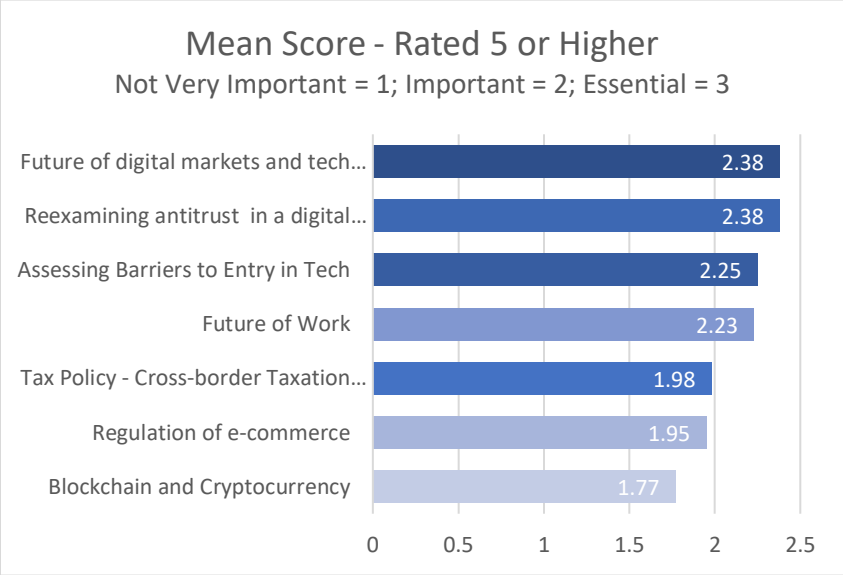
Digital Markets and Competition Topics

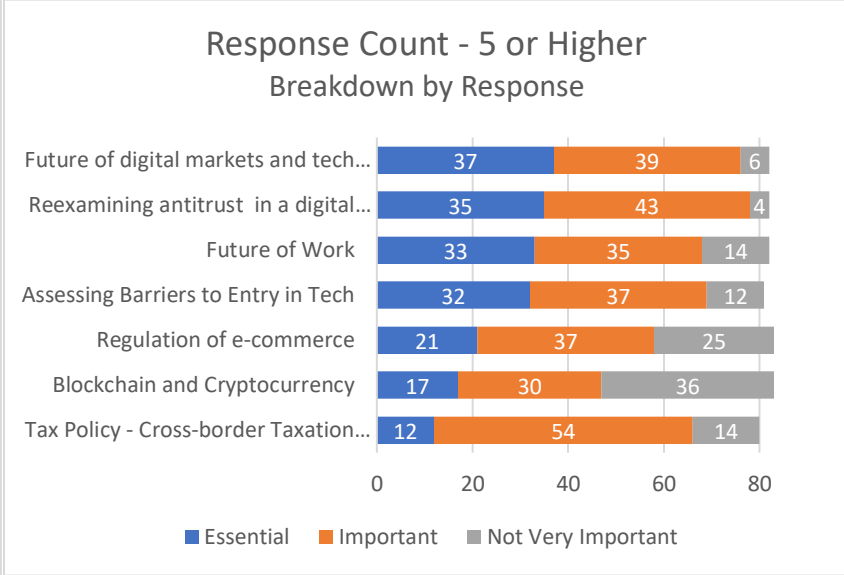
The charts below show the mean scores and response counts for each option, based on the rating they gave to Digital Markets and Competition in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

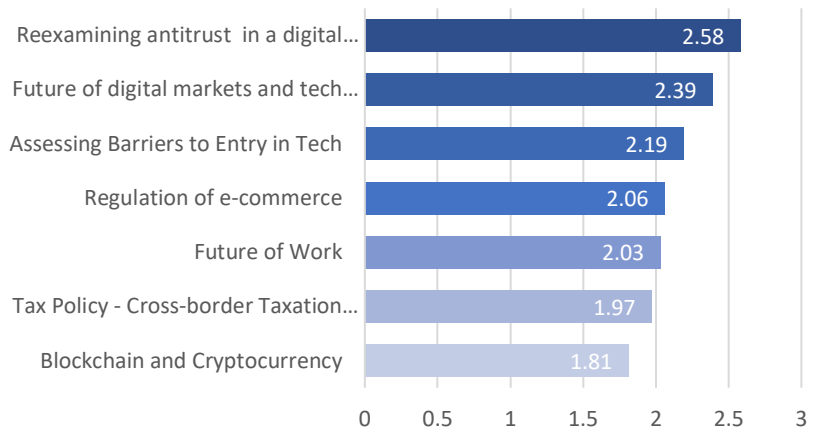
- Not Very Important = 1
- Important = 2
- Essential = 3

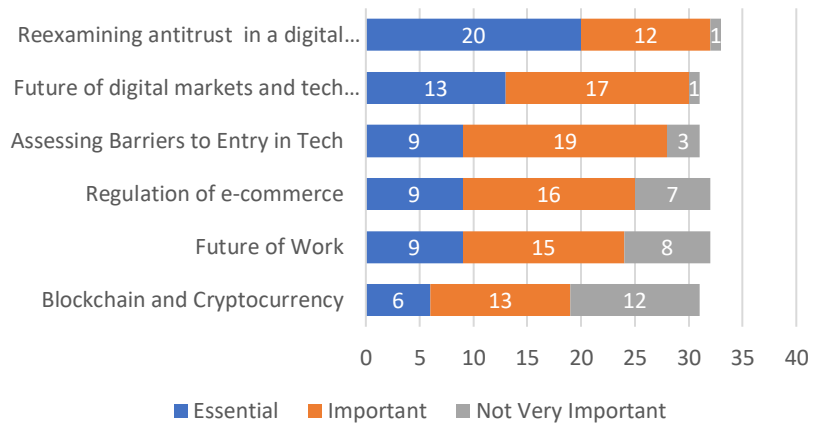


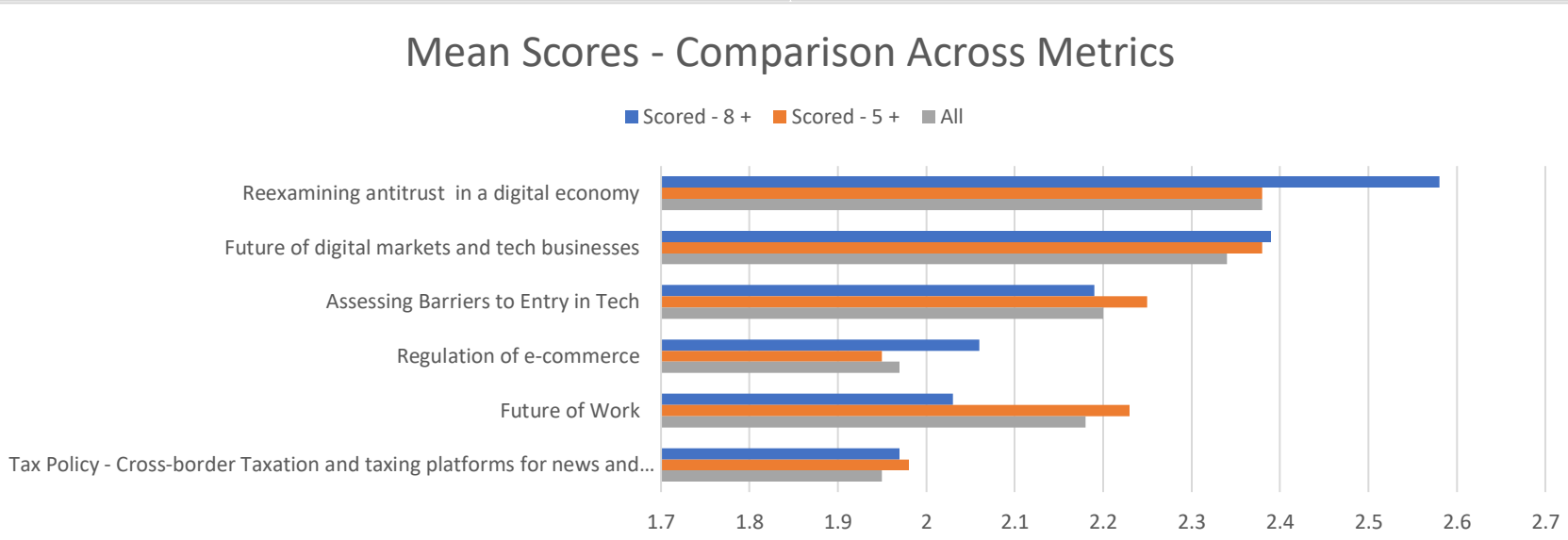










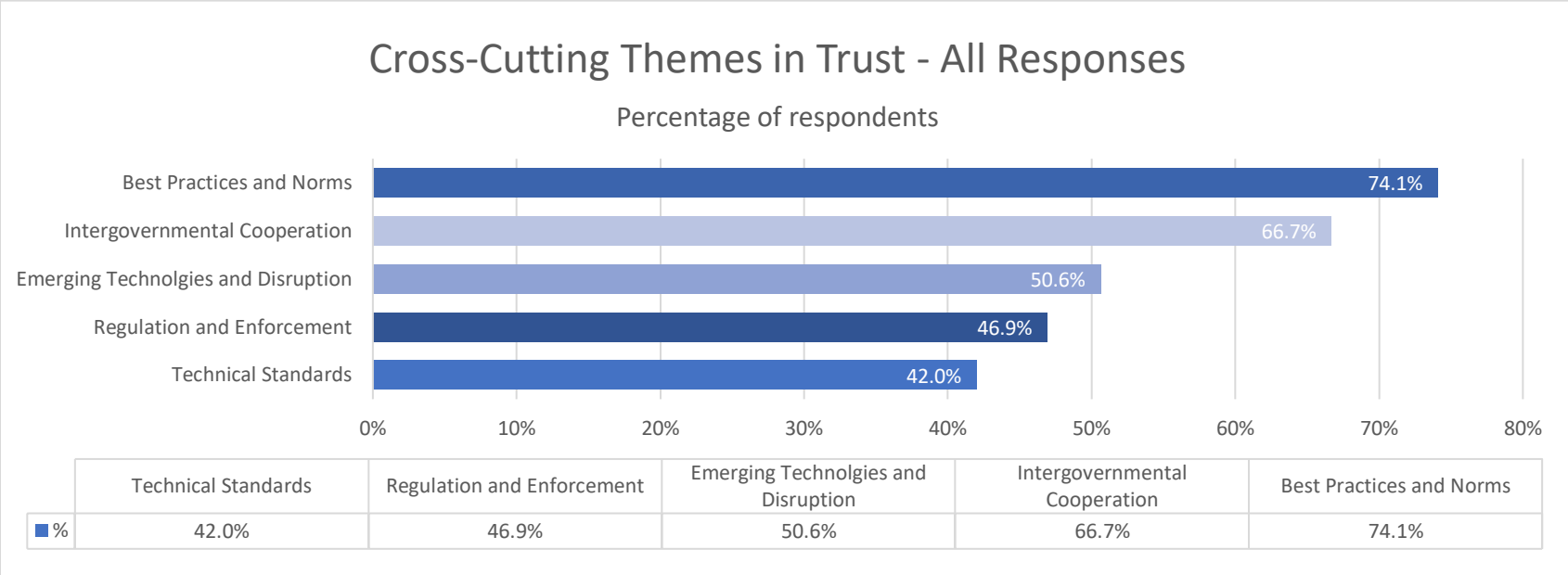


	Tax Policy - Cross-border Taxation and taxing platforms for news and journalism	Future of Work	Regulation of e-commerce	Assessing Barriers to Entry in Tech	Future of digital markets and tech businesses	Reexamining antitrust in a digital economy
Scored - 8 +	1.97	2.03	2.06	2.19	2.39	2.58
Scored - 5 +	1.98	2.23	1.95	2.25	2.38	2.38
All	1.95	2.18	1.97	2.2	2.34	2.38

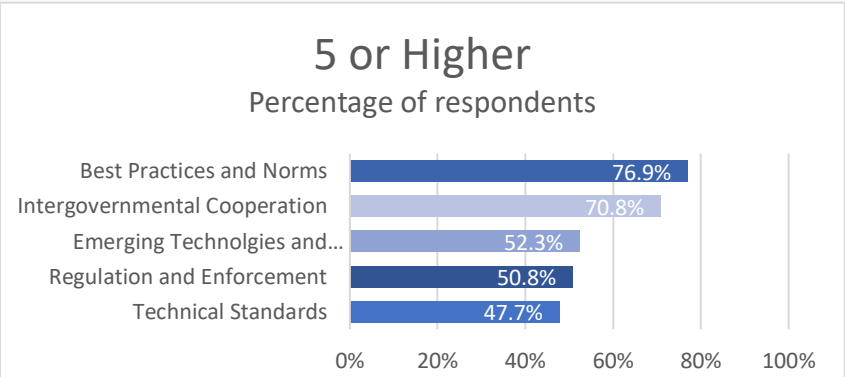
Subject Area Breakdown – Trust

Cross-Cutting Themes

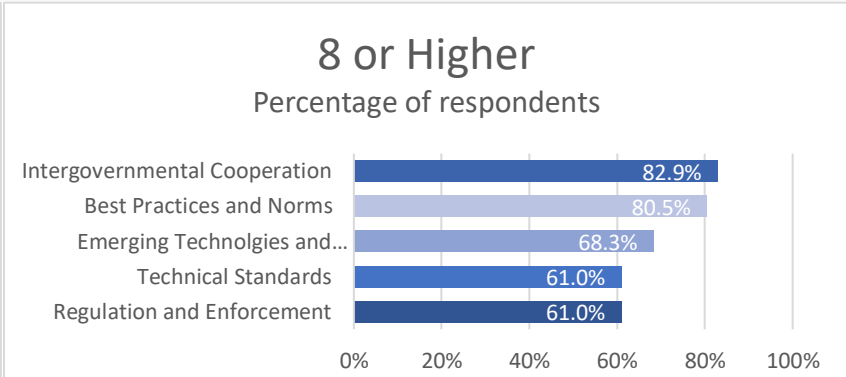
The charts below show the percentage of respondents that selected each theme for the Trust Subject Area, based on the rating they gave to Trust in Section 3.



	Technical Standards	Regulation and Enforcement	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Best Practices and Norms
%	42.0%	46.9%	50.6%	66.7%	74.1%

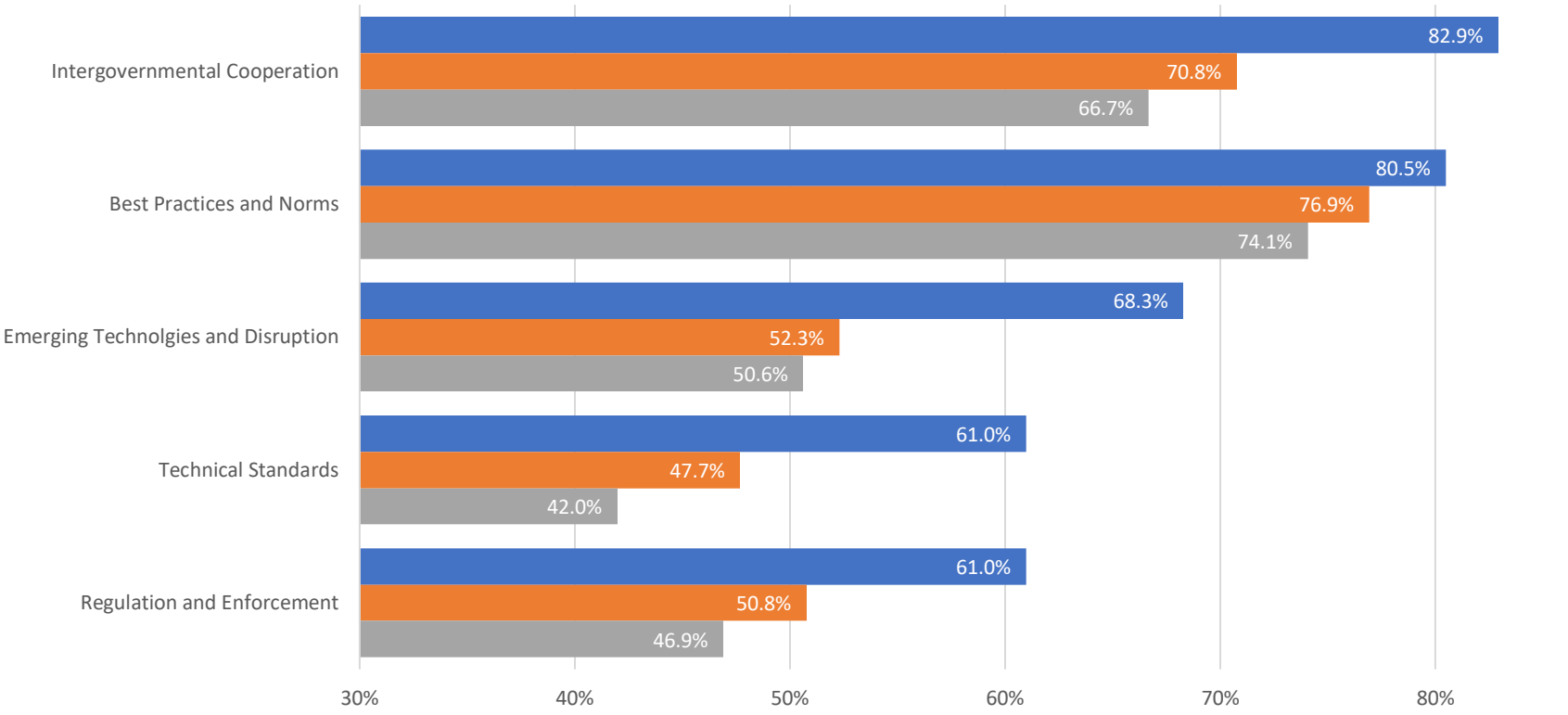


	Technical Standards	Regulation and Enforcement	Emerging Technolgies and Disruption	Intergovernmental Cooperation	Best Practices and Norms
%	47.7%	50.8%	52.3%	70.8%	76.9%



	Regulation and Enforcement	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation
%	61.0%	61.0%	68.3%	80.5%	82.9%

This chart combines the data from the other graphs in this section for easier comparison of results across metrics.

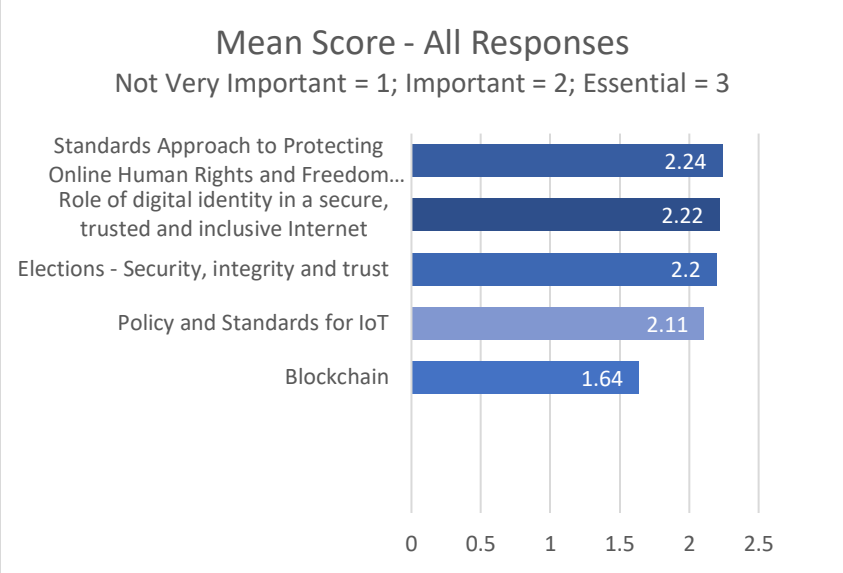


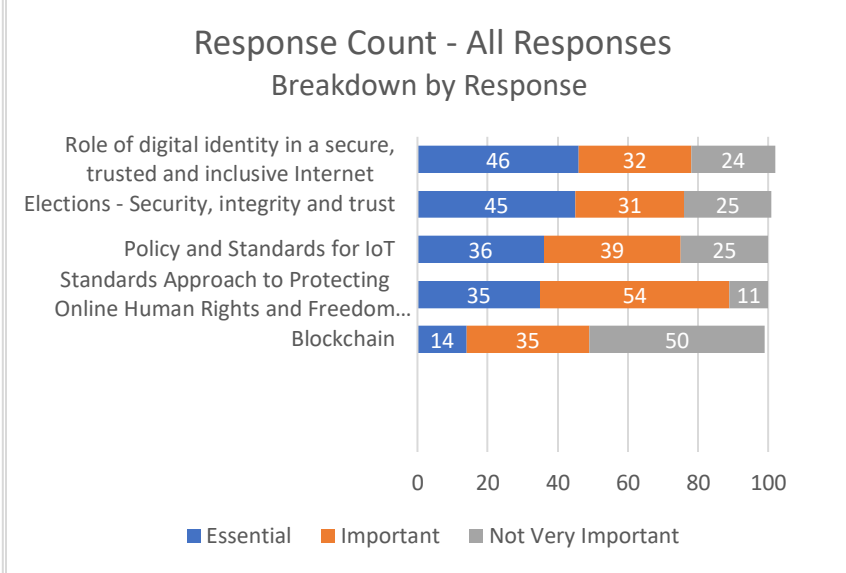
	Regulation and Enforcement	Technical Standards	Emerging Technolgies and Disruption	Best Practices and Norms	Intergovernmental Cooperation
Scored - 8 +	61.0%	61.0%	68.3%	80.5%	82.9%
Scored - 5 +	50.8%	47.7%	52.3%	76.9%	70.8%
All	46.9%	42.0%	50.6%	74.1%	66.7%

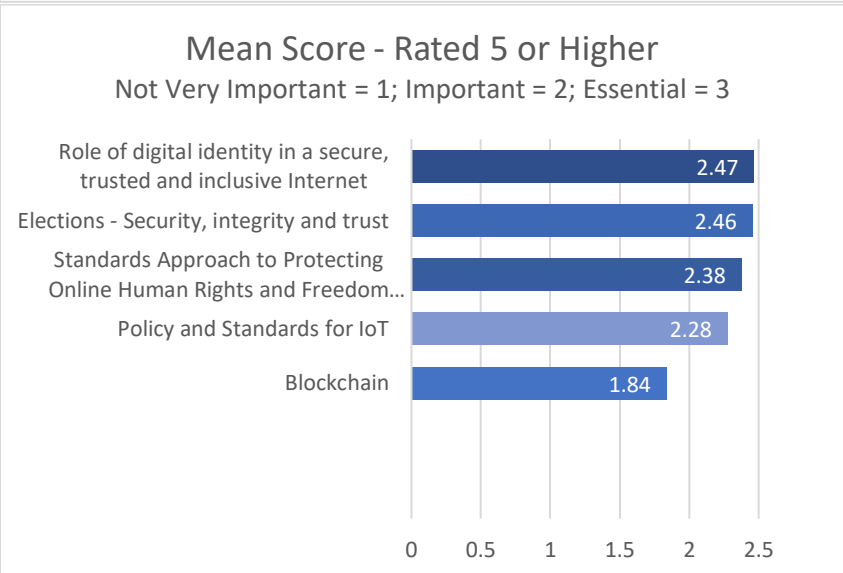
Trust Topics

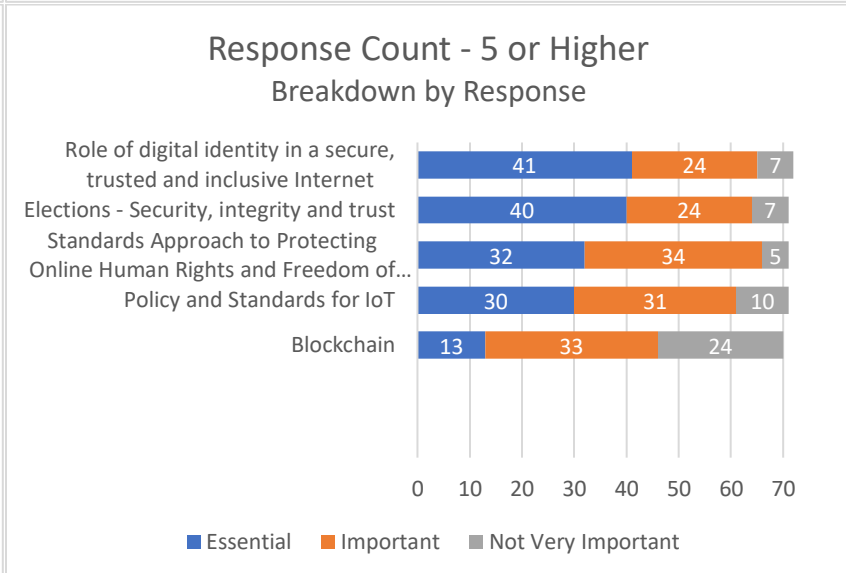
The charts below show the mean scores and response counts for each option, based on the rating they gave to Trust in Section 3. The point system used to calculate the mean score assigns the following numerical values to each point of the Likert Scale:

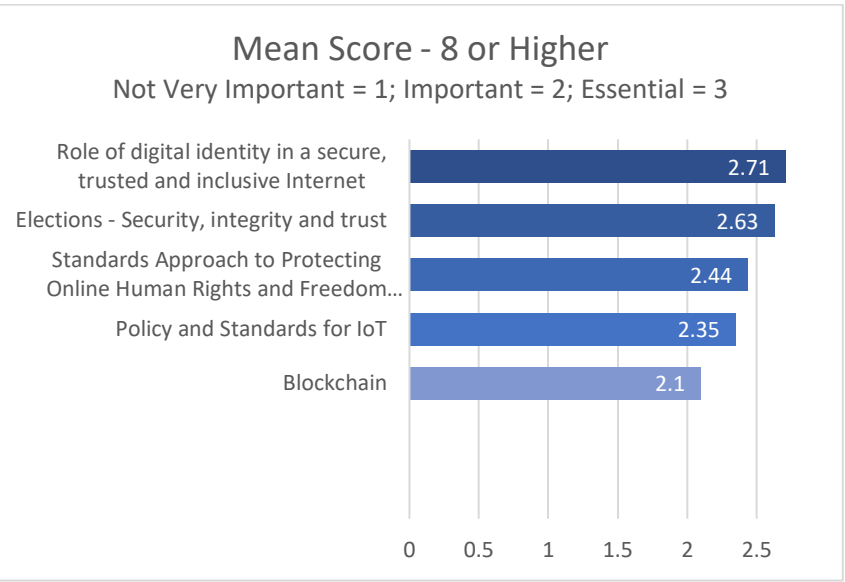
- Not Very Important = 1
- Important = 2
- Essential = 3

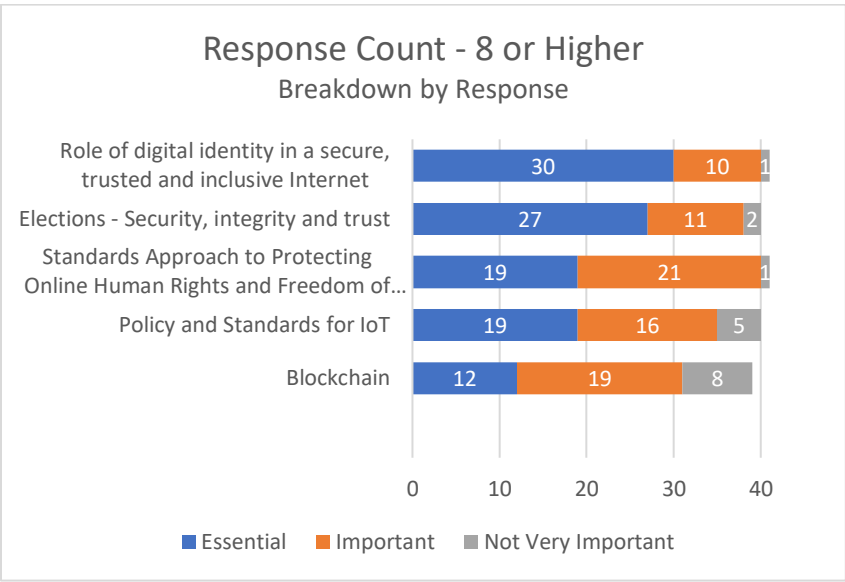


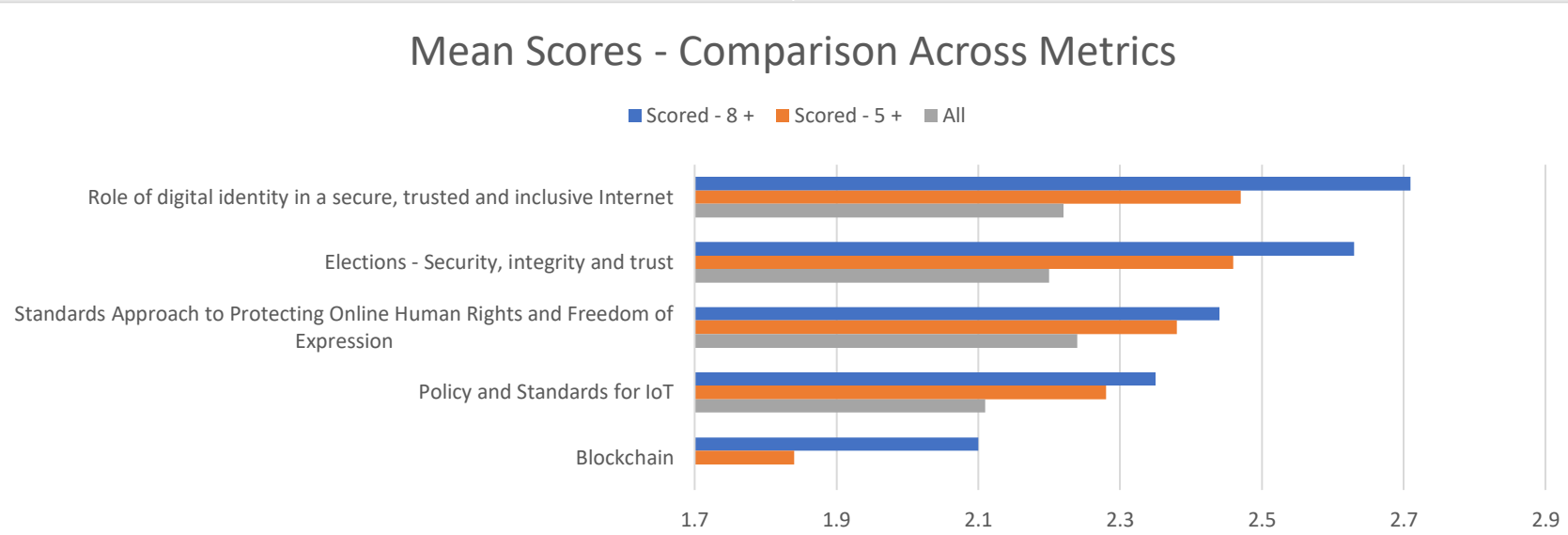






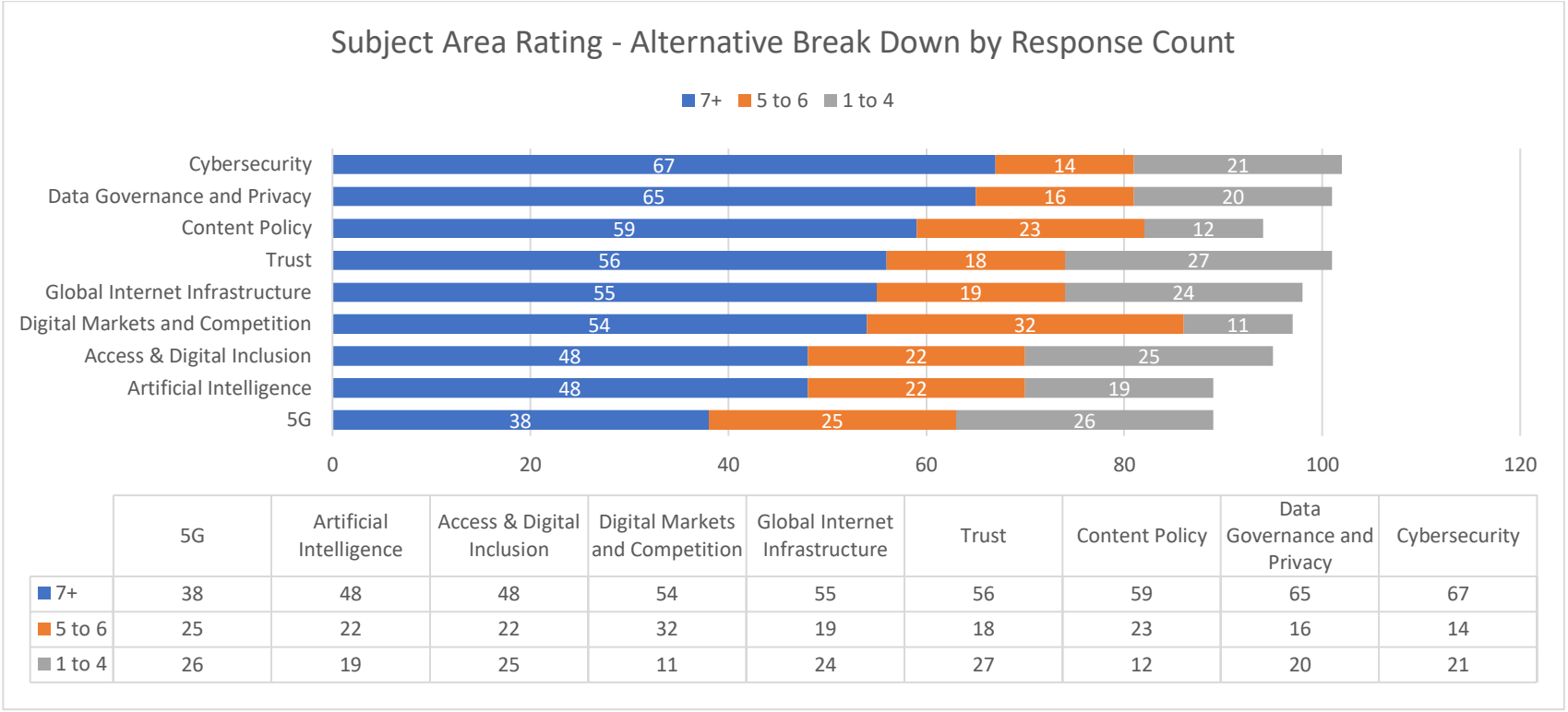
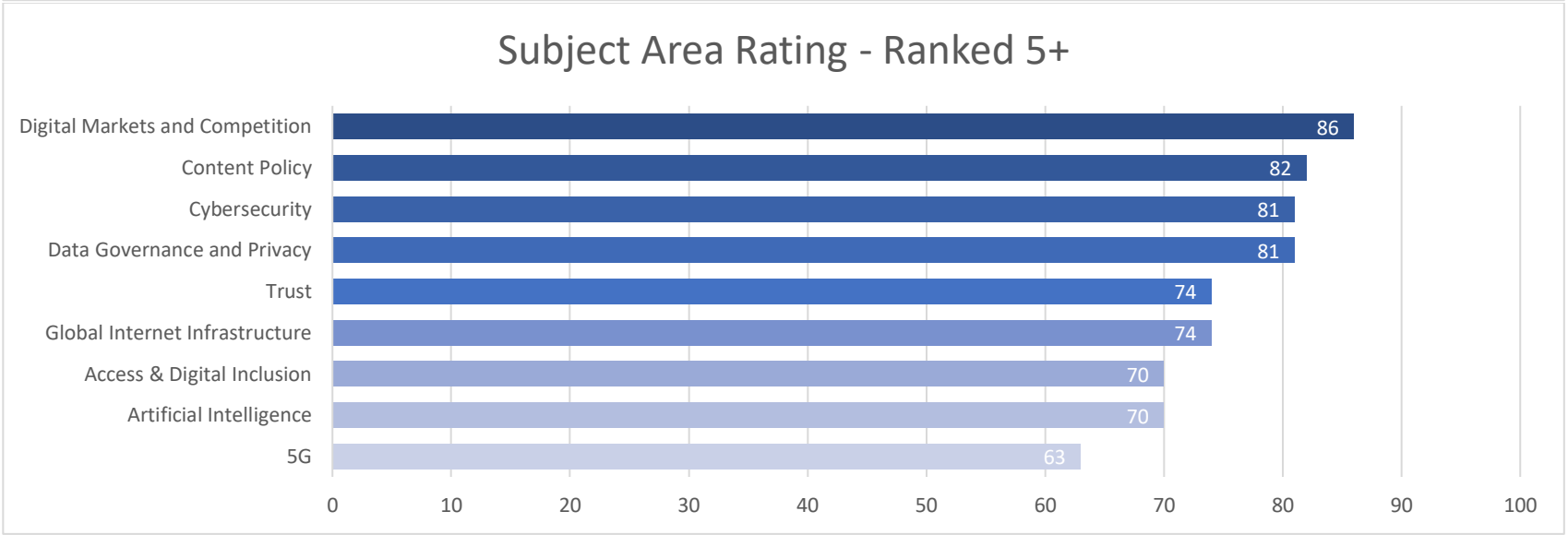






	Blockchain	Policy and Standards for IoT	Standards Approach to Protecting Online Human Rights and Freedom of Expression	Elections - Security, integrity and trust	Role of digital identity in a secure, trusted and inclusive Internet
Scored - 8 +	2.1	2.35	2.44	2.63	2.71
Scored - 5 +	1.84	2.28	2.38	2.46	2.47
All	1.64	2.11	2.24	2.2	2.22

Annex: Alternative Break Downs of Subject Area Ratings



	5G	Artificial Intelligence	Access & Digital Inclusion	Digital Markets and Competition	Global Internet Infrastructure	Trust	Content Policy	Data Governance and Privacy	Cybersecurity
7+	38	48	48	54	55	56	59	65	67
5 to 6	25	22	22	32	19	18	23	16	14
1 to 4	26	19	25	11	24	27	12	20	21