



# **motivaction**

**research and strategy**

## **Getting to know the grassroots**

Vereniging Wikimedia Nederland



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Acting on instructions from the Vereniging Wikimedia Nederland, represented by Sandra Rientjes, Motivaction International B.V. conducted a survey of the Wikimedia Nederland supporters and members and the users of the various Wikimedia initiatives including, in particular, the users of Wikipedia.

- Wikimedia Nederland is the Dutch branch of the Global Wikimedia Foundation, the organisation that promotes free knowledge. The Wikimedia Foundation's flagship is Wikipedia.
- An estimated 3 million Dutch people (aged 18 to 80 years) are regular visitors to wikipedia.org (source: Motivaction Mentality survey 2011).
- Wikimedia is an association with approximately 200 members. In addition, there are approximately 1200 people who make active contributions to Wikipedia by, for example, writing articles or by means of other activities.
- Wikimedia has engaged on a process of professionalisation and sees this as one way of achieving growth. As part of this process, Wikimedia wants to know more about its grass-roots supporters, potential supporters and target groups: who are they, what motivates them, and how can they be reached?

The objective of the survey can be described as follows:

**to provide Vereniging Wikimedia Nederland (WMNL) with an understanding of the profile, wishes, demands and expectations of its current grass-roots supporters so that Wikimedia can bring its marketing communication activities more in line with its supporters.**

The objective can be expressed as the following, multiple, set of issues:

- How can the profile of the members, Wikipedians and users be described? Which background characteristics typify the different groups? And to what extent can different sub-groups be identified?
- How can they be reached?
- What motivates them?
- To what extent are people active or passive members / Wikipedians? How do people see the association?
- To what extent do people feel involved with the association? Would people recommend membership/active participation to others?
- What is the situation with respect to satisfaction with association policy? What are the priorities with respect to enhancing satisfaction?
- What are the expectations, wishes and requirements of the members, Wikipedians and users with respect to the Wikimedia policy?
- Where do they think improvements can be made?



The survey looked at three target groups:

- Members
- Contributors
- Users



Two different questionnaires were used: one for members/contributors and one for users. Both questionnaires were completed online.



All the members (approximately 200) were sent a letter by Wikimedia itself, with a reference to the online link to the questionnaire. A link to the questionnaire was installed 'behind' the Wikipedia site for the contributors (numbering approximately 1200). A total of 388 questionnaires were completed in full by these two groups. The analyses of the results looked at differences between members and contributors, and also at differences between active, neutral and passive members/contributors.



A sample of users was taken from the Motivaction online survey panel (Stempunt.nu). This sample is a representative reflection of the Dutch population aged 18 to 70. A total of 2750 people were invited to participate in the survey, and this resulted in 1089 fully completed questionnaires. The analyses of the results for this group looked at the differences between the sexes, age categories and educational background.



## Contributors and members

### Membership more than satisfactory

The leading reasons for becoming a member of the association are, by far, the importance that people attributed to free access to knowledge and a desire to support Wikipedia and other Wikimedia projects. The members find membership to be very satisfactory and two thirds of them would advise others to become members.

### Active supporters and members are more positive

Contributors to Wikipedia mainly make contributions because they like to share information or to add/correct information. More than a third see themselves as active members or contributors. This active group is much more positive about the association than the passive supporters: they feel more involved with WMNL, believe they are taken more seriously, are more appreciated and they are more satisfied with the policy. The same picture emerges with respect to commitment to Wikipedia: there is more commitment among active contributors. Members are also often more positive about the association than contributors. WMNL is well advised to encourage active participation by supporters and members.

### The working atmosphere and communications could be improved.

The grass roots see support for the current volunteers and mobilising new volunteers as the WMNL core responsibilities. Retention is therefore just as important as recruitment. Particularly when it comes to retaining volunteers, improvements can be made by the association because more than a quarter of those surveyed were dissatisfied with the working atmosphere at Wikipedia and also dissatisfied with the indications between editors. Some argue in favour of more supervision from WMNL, for example by only allowing registered people to make contributions. Guidelines for contributors could perhaps also help to improve the collegial atmosphere.





## **WMNL should establish a more prominent profile for itself**

A considerable group of contributors say they do not know that there is an association, let alone know what activities it organises. It is therefore not surprising that more than half of the members and contributors are not informed about the WMNL activities. It is therefore clear that the association should be making efforts to establish a more prominent profile, which will perhaps also result in an increase in the membership. The WMNL and Wikipedia sites would appear to be the most suitable instruments for this purpose.

## **The grass roots are generally highly educated males**

Young people below the age of 24 and people from the 55+ age group make of a large proportion of the members or contributors. Many of them are in salaried employment or freelancers, and four out of ten are married or live together with a partner.

**Users**

## **Awareness and use of Wikipedia are high**

Almost a quarter of the Dutch population mention Wikipedia *spontaneously* as a source of information. Google is the most widely used source, followed by Wikipedia. Seven out of ten people say they know Wikipedia *and* that they use it, and more than half of these people do so at least once a week. The main motive is 'looking something up quickly', but personal interest is also a reason. Wikimedia users are often well educated males under the age of 34. Only 4% of the Dutch population are totally unfamiliar with Wikipedia.

Wikipedia users are very happy with the readability and usefulness of the articles. People are more critical, particularly women and people with an advanced educational background, about objectivity, reliability, completeness and truth.



## **Awareness of Wikipedia and Wikimedia is, on the other hand, limited**

Users are generally well informed about articles on Wikipedia, but less well informed about matters relating to financing. For example, more than half are not aware that Wikipedia is entirely dependent on donations. A considerable majority is also unfamiliar with other Wikimedia initiatives such as Wiktionary, and more than half have no idea what WMNL activities consist of.

It would therefore be advisable to inform users better about the working methods and activities of both Wikipedia and Wikimedia in the assumption that this will perhaps result in greater commitment.

## **There is a group of potential contributors who can be helped over the threshold**

22% of Dutch people think it is probable that they will make a contribution to Wikipedia during the next year. This percentage is based upon the number of people who wish to contribute in at least one of the different ways possible. The main reasons people do not yet contribute is that they do not feel any need to do so or do not know what to contribute about. However, some people also say that they do not know how to go about it, that they are afraid of making mistakes or that they do not think they have the requisite technical skills. This group could be mobilised by, for example, providing more explanation and support.





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# Members and contributors

## Sample of members/contributors

Which of the statements below applies to you? (n=388)

I am a member of the Wikimedia association

10%

I contribute to the content of Wikipedia and/or other Wikimedia projects

76%

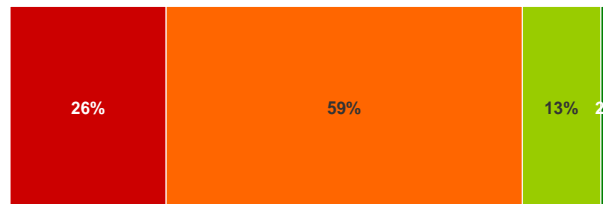
Both apply to me

14%

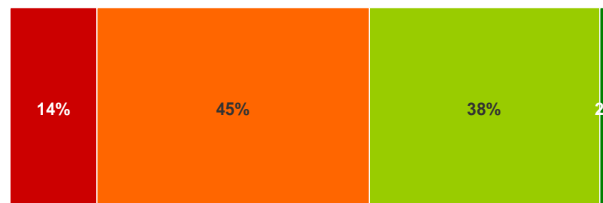


## Association members and contributors have often been so for a long time

How long have you been a member of the Wikimedia association? (n=93)



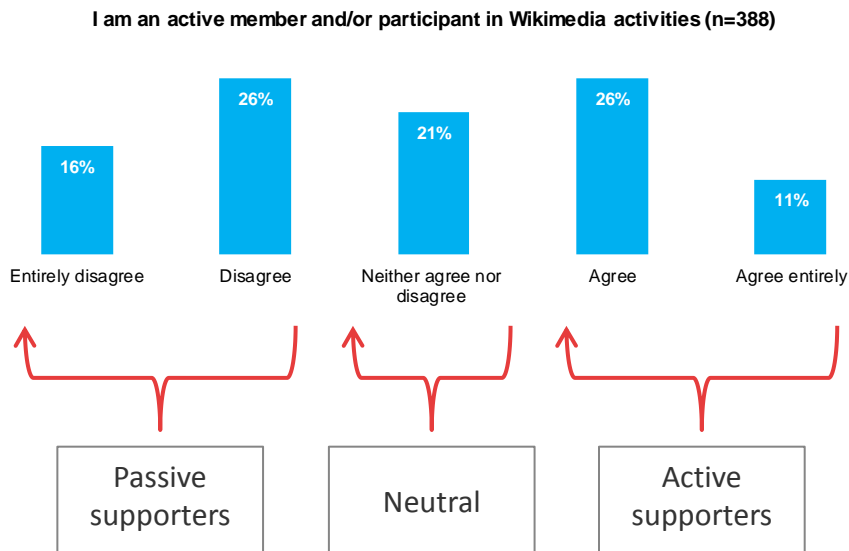
How long have you been contributing to the content of Wikipedia and/or other Wikimedia projects? (n=348)



■ Less than 1 year   ■ 1 to 5 years   ■ 5 to 10 years   ■ More than 10 years

- In a comparison of the two groups, it is striking that contributors have generally been active for slightly longer than members.
- 24% of those surveyed were members. More than half of that group are also contributors. It would appear to be the case that people usually start as contributors and that some of them later become members.

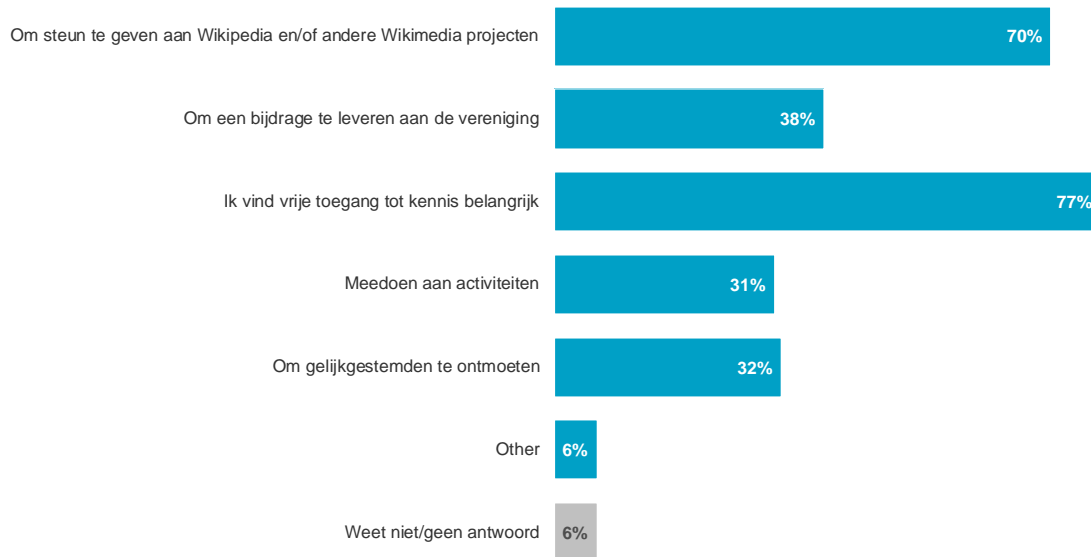
## Over one third see themselves as active members or contributors



There are slightly more passive supporters (42%) than active supporters (37%).

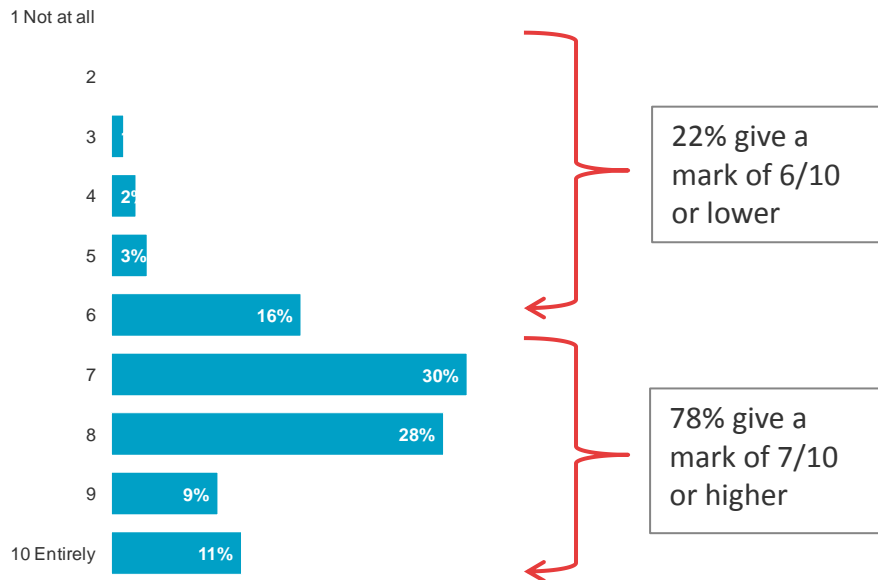
## The main reason for membership is thinking free access to knowledge is important

Wat waren voor u de belangrijkste redenen om lid te worden van de Vereniging Wikimedia Nederland? (Basis -ls verenigingslid van Wikimedia, n=93)



## The majority are satisfied with their membership but there is room for improvement

To what extent has membership fulfilled your expectations? Can you rate this on a scale of 1 to 10 in which 1=not at all and 10=entirely? (Basis -Is member of Wikimedia association, n=93)

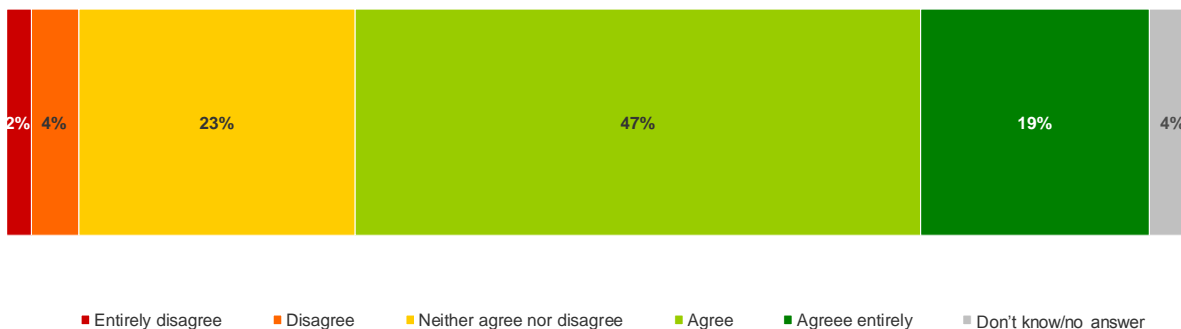


Average  
rating

**7.4**

## Two thirds of the current members recommend membership

I would recommend WMNL membership to anyone (Basis – Is member of Wikimedia association, n=93)

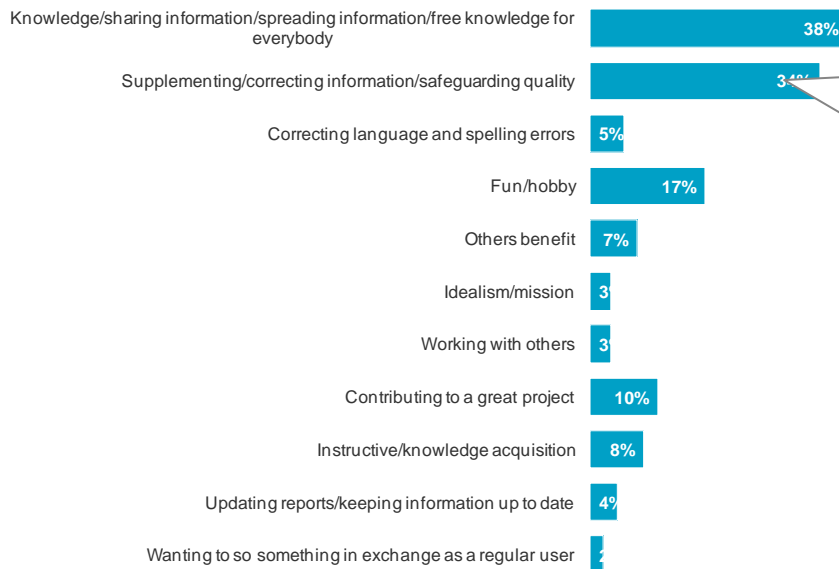


The active members would seem to be most critical about membership and their recommendation percentage is lower than that of passive members (57% and 71% respectively; N.B. this difference is indicative, not significant).



## The main reason for contributing is 'Making information available to everybody'

What are the most important reasons for you to continue making a substantive contribution Wikipedia /Wikimedia? (Basis  
-Contributes to Wikipedia content/Wikimedia projects, n=348)



The second reason that is often given is 'adding to information/correcting information/safeguarding quality'.

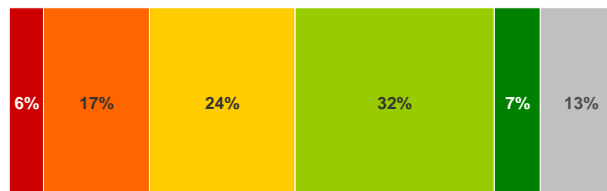
There is only a limited overlap between the two most frequently stated reasons. This is an indication that there may be a group that only writes articles and another group that only edits articles.



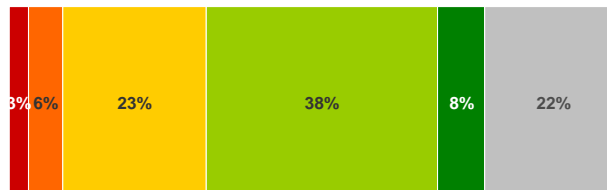
## Commitment to WMNL is reasonable to good

To what extent do you agree with the following statements about the Dutch Wikimedia Association (WMNL): I feel committed to WMNL (n=388)

To what extent do you agree with the statements below about the Association Wikimedia Nederland (WMNL): I feel committed to WMNL



To what extent do you agree with the statements below about the Association Wikimedia Nederland (WMNL): I feel WMNL takes me seriously



■ Entirely disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Entirely agree 
 ■ Don't know/no answer

- The more active the involvement with WMNL, the greater the level of commitment.
- This association is also reflected in the sense of how serious people think they are being taken by WMNL: the more active they are, the more they feel this is the case.
- Members feel both things more than contributors.

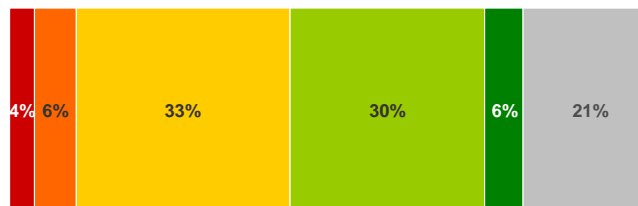
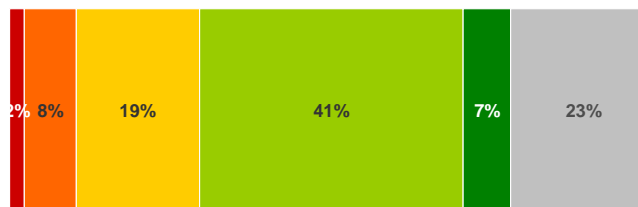
## Half of them agree with the WMNL policy, a quarter don't know anything about it.

To what extent do you agree with the following statements about the Dutch Wikimedia Association (WMNL): I am satisfied with the WMNL policy (n=388)

To what extent do you agree with the statements below about the Association Wikimedia Nederland (WMNL): I am satisfied with the policy of WMNL

Dissatisfied people are in favour of strict guidelines and more supervision, for example by allowing only registered people to contribute. Some are also unhappy about some moderators (aggressive, lack of expertise); collegial relationships and the working atmosphere sometimes leave room for improvement.

To what extent do you agree with the statements below about the Association Wikimedia Nederland (WMNL): I feel appreciated by WMNL

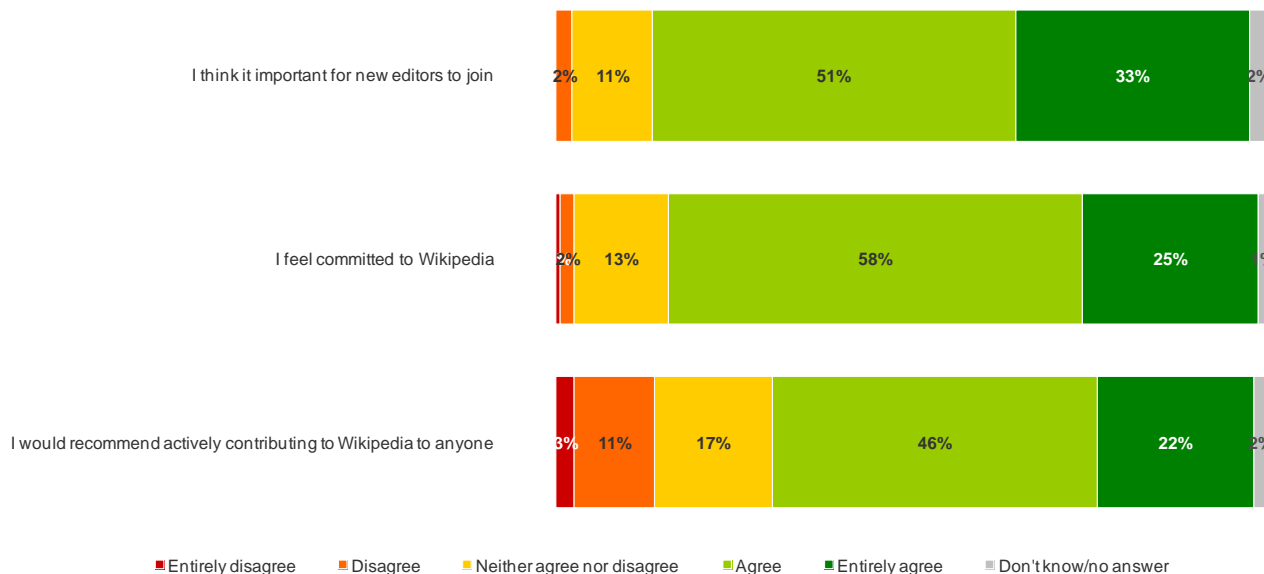


■ Entirely disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Entirely agree ■ Don't know/no answer

- The active supporters are much more satisfied with the policy than the passive supporters.
- This association is also reflected in the sense of how much people think WMNL appreciates them: the more active they are, the more they feel this is the case.
- Members feel both things more than contributors.

## Commitment of contributors to Wikipedia is high

In hoeverre bent u het eens met onderstaande stellingen over Wikipedia? Basis - Allen (n=348)

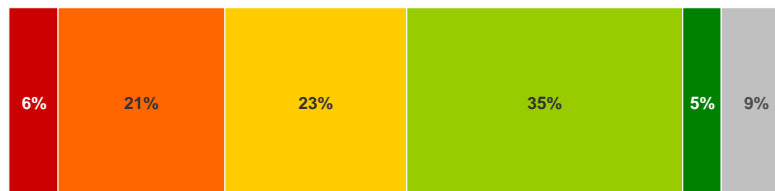


- The contributors think it is important for new editors to join.
- 68% recommend contributing actively to Wikipedia.
- Active contributors feel more committed.

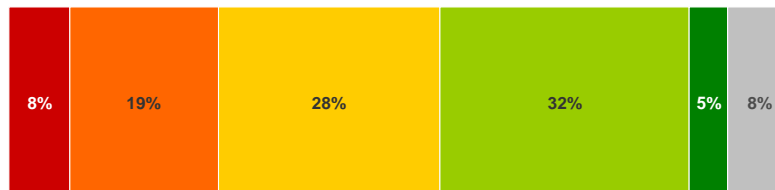
## Opinions are divided about the working atmosphere at Wikipedia

To what extent do you agree with the statements below about the Association Wikimedia Nederland (WMNL): Basis - All (n=348)

I am happy with the working atmosphere at Wikipedia



I am happy with communications between the editors

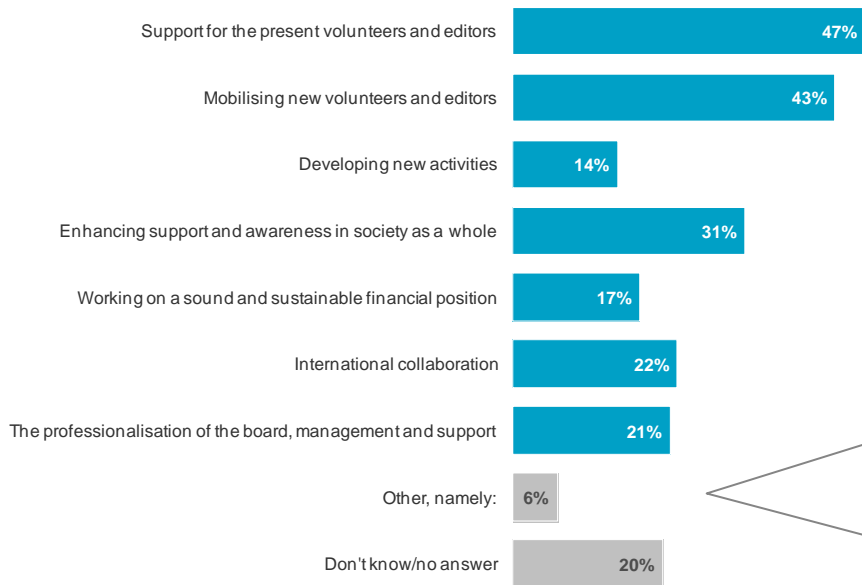


■ Entirely disagree 
 ■ Disagree 
 ■ Neither agree nor disagree 
 ■ Agree 
 ■ Entirely agree 
 ■ Don't know/no answer

- More contributors are satisfied with the working atmosphere than unsatisfied, but the number of unsatisfied people is high (27%).
- More than a quarter are also dissatisfied with communications. That is also a sizeable group.

## Support for current volunteers and mobilisation of new volunteers most important

Which of the following WMNL activities are most important for you: (n=388)

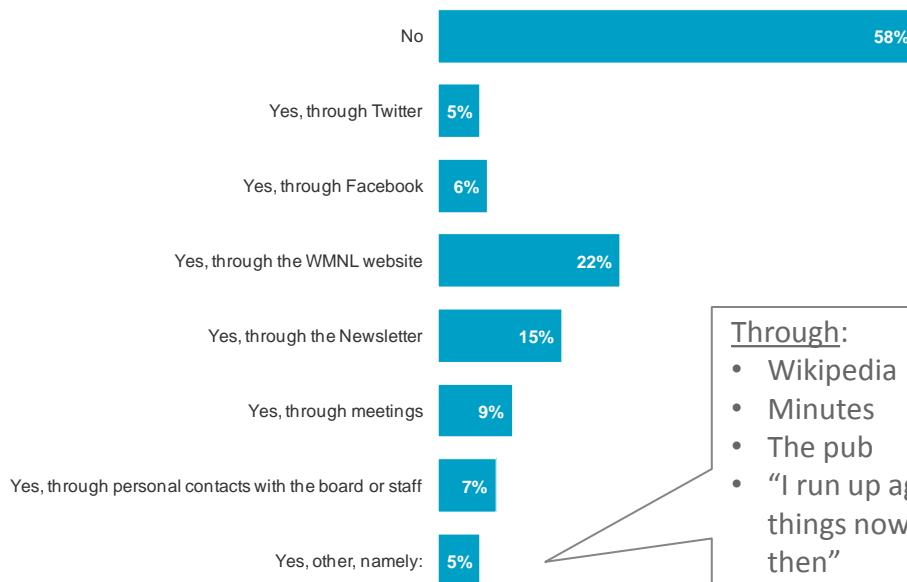


### Improve:

- Quality of articles
- Editor
- Reliability
- Alliances
- Image
- Servers
- Editing of articles
- Organisation (WMNL)

## More than half do not keep informed about the WMNL activities

Do you keep informed about WMNL activities: (n=388)



### Through:

- Wikipedia
- Minutes
- The pub
- "I run up against things now and then"

- The passive supporters are often *not* as well informed about WMNL activities as the active supporters.
- Members keep better informed more often than contributors.
- Members use all types of media more often than contributors.

## A potential improvement is the generation of more awareness of WMNL



- Many contributors say they do not know that there is an association, let alone know what activities it organises. So raising the association's profile and making it clear what it does are suggestions that are frequently heard.
- Other suggestions for improvements relate to content:
  - Mandatory statement of sources
  - Permission for external links
  - Limitation on number of pop-ups
  - Clearer navigation for the help pages
  - Reticence when it comes to removing pages quickly for unclear reasons: this discourages new contributors



## Members are generally more active than contributors

How many hours a week do you spend an average on Wikipedia and/or other Wikimedia projects?

|                                |     |                 |     |
|--------------------------------|-----|-----------------|-----|
| Member (n=53)                  | 7.9 | Passive (n=143) | 4.4 |
| Contributes to content (n=348) | 5.4 | Neutral (n=70)  | 4.4 |
|                                |     | Active (n=135)  | 7.0 |

Members who contribute to Wikipedia or other Wikimedia projects spend an average of 8 hours a week on them.



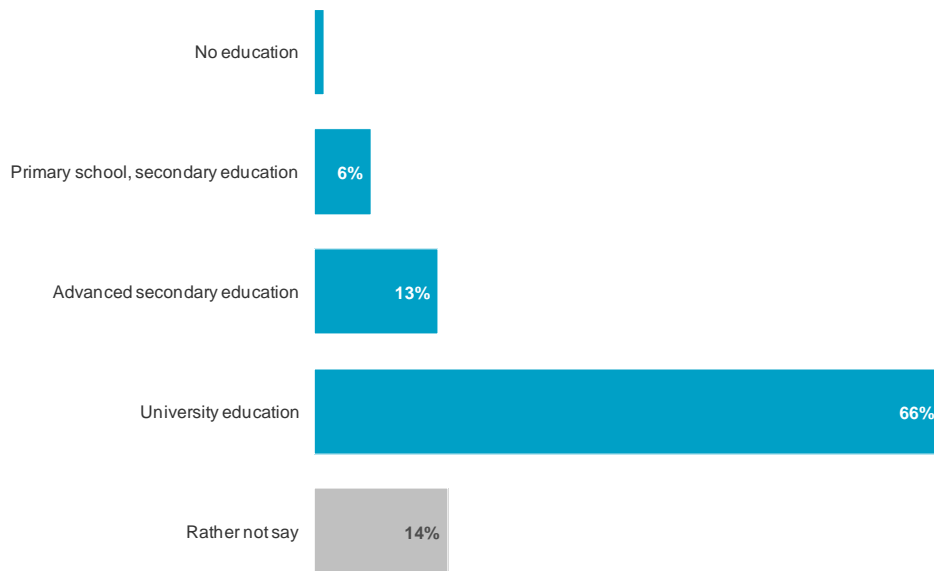
## The large majority of members and contributors are male

Are you a ...? (n=388)



## Level of education of members and contributors is high

What is your highest completed level of education? (n=388)

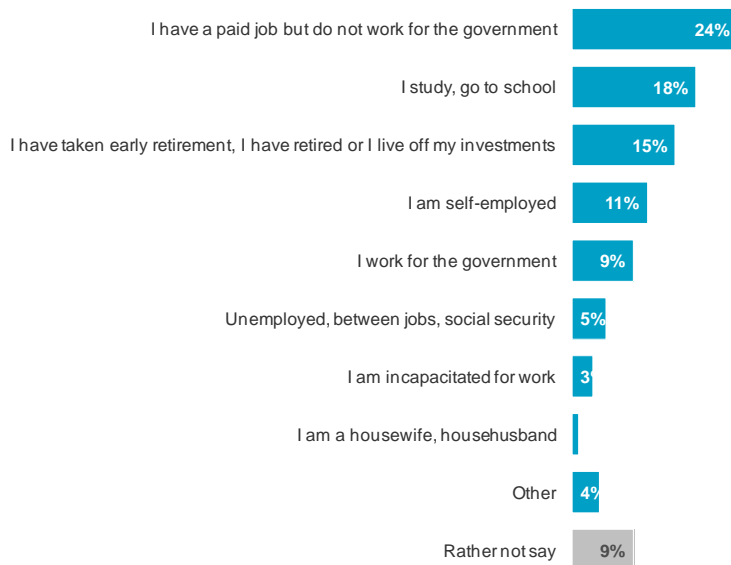


Two thirds of the supporters have university degrees.



## One third work in salaried employment (in the private sector or for the government)

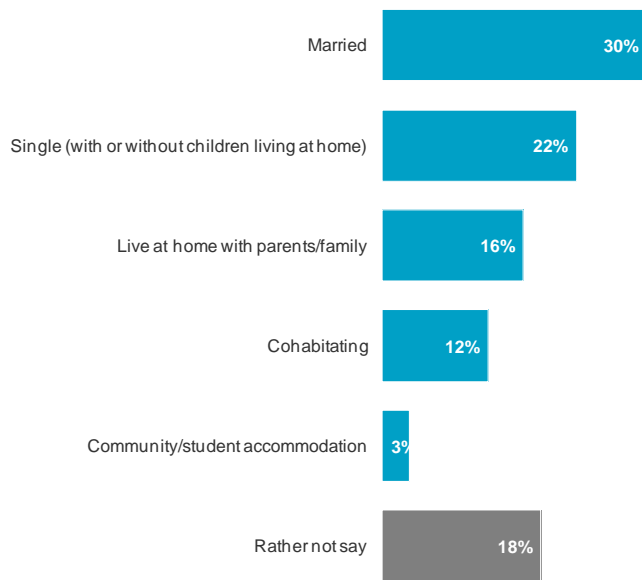
Please state below the most applicable description of your working week. (What do you spend most time on during the working week?) (n=388)



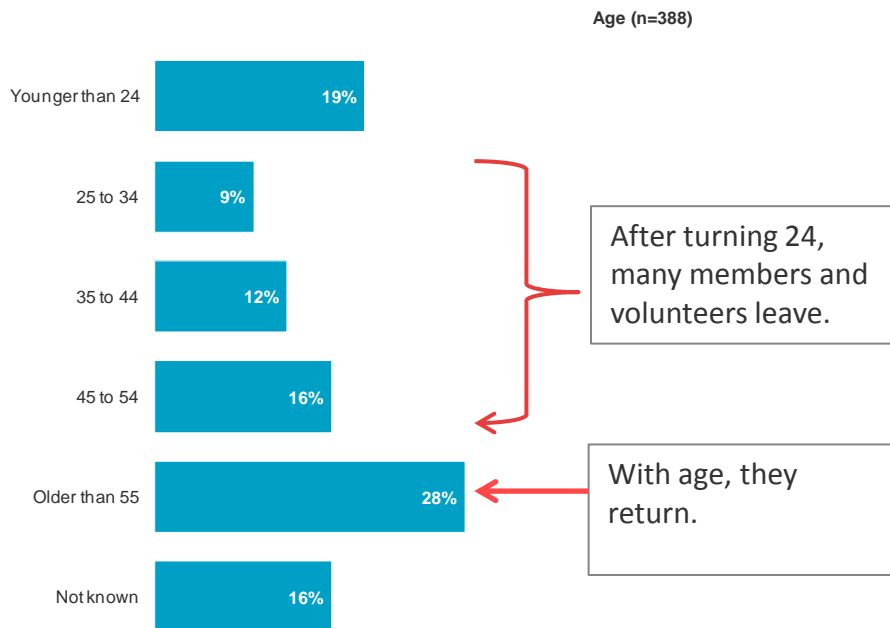
- 44% are salaried employees or self-employed. They work an average of 37 hours a week.
- Almost one fifth are school pupils. There are fewer school pupils among the members than among the contributors.
- There are more pensioners among the active supporters than among the passive supporters.

## Four out of ten are married or live together with a partner

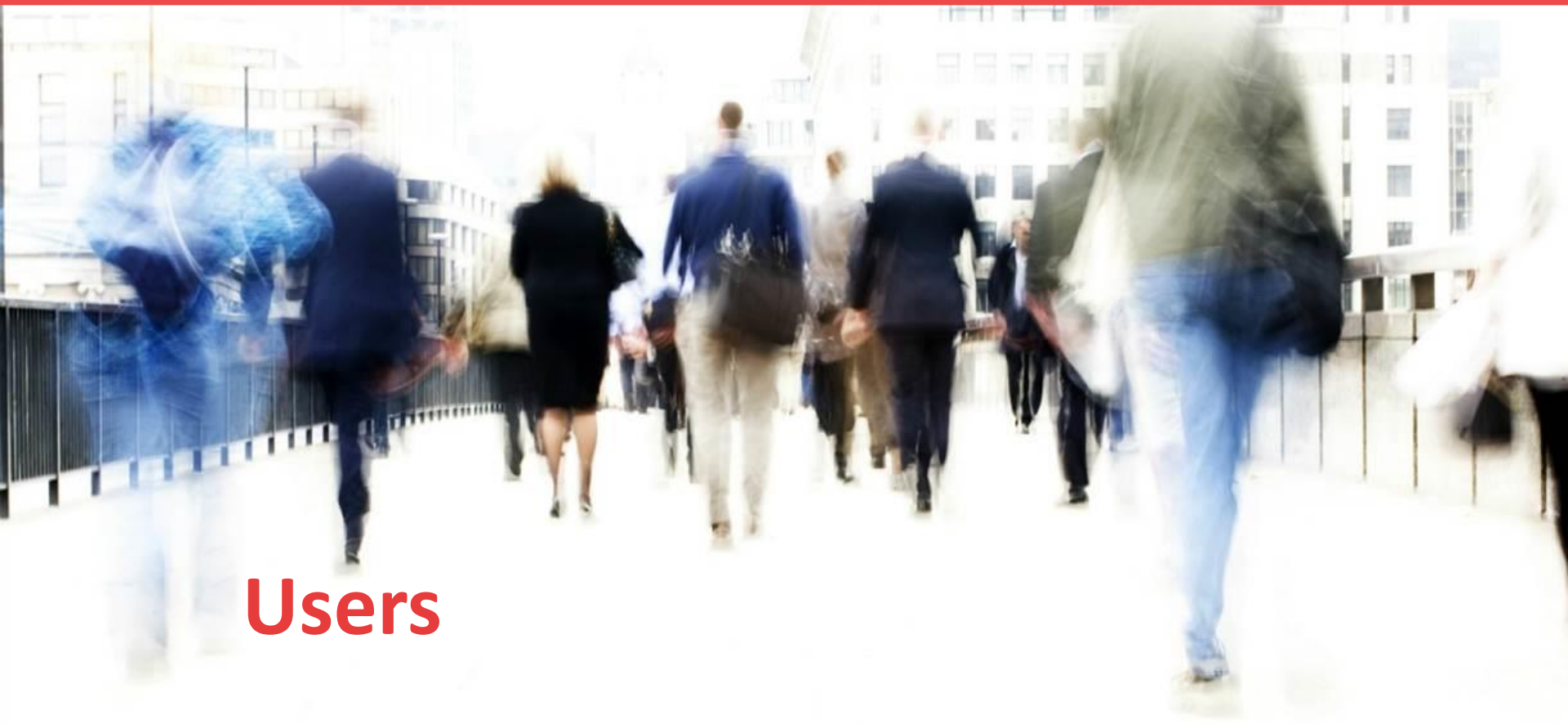
Please describe your domestic situation (n=388)



## Young people and older people are well represented



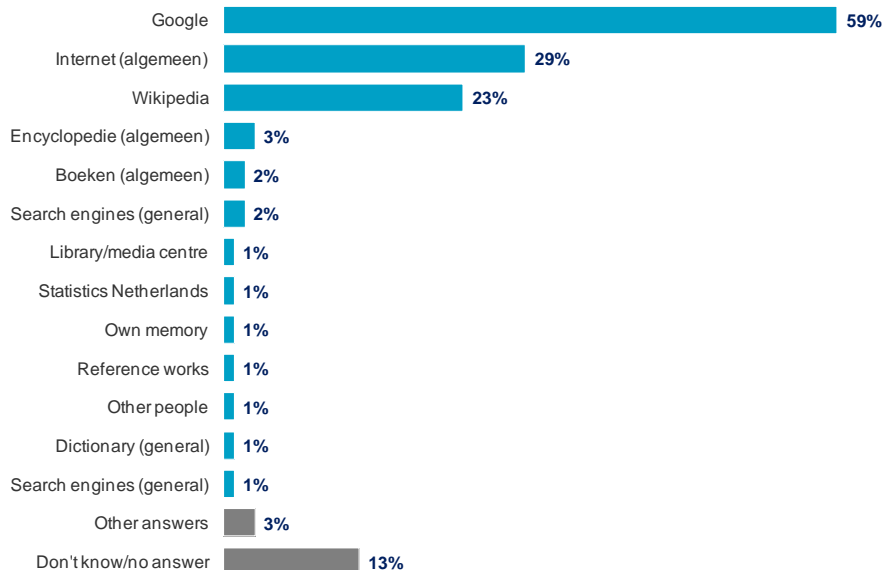
- More than a quarter of the members or contributors are aged 55 or older and almost one in five are under 24 years of age.
- There are fewer young people among the members than among the contributors.



# Users

## Spontaneous awareness: 23% mention Wikipedia

If you want to find out facts such as the number of people in Holland, or what a particular term means, how do you go about it? What sources do you use? (n=1,089)

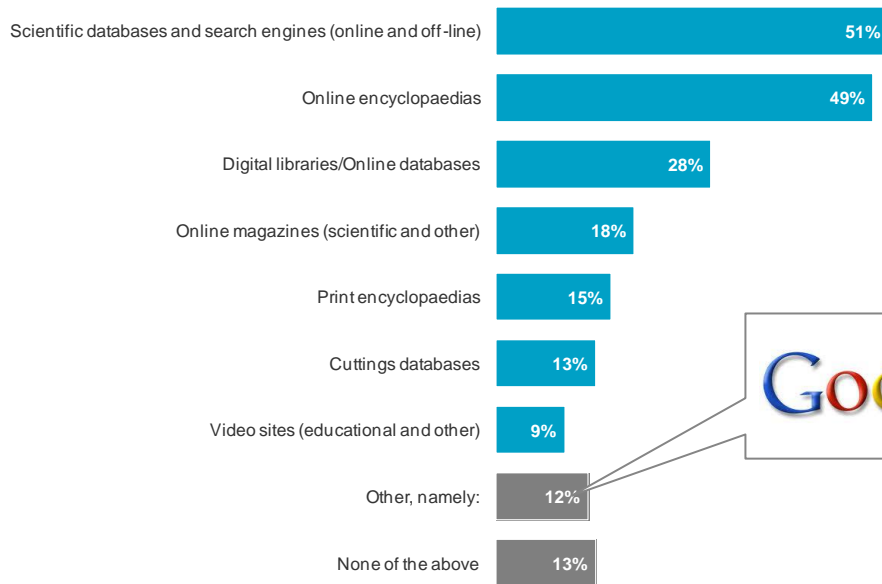


- There is little doubt that many people find Wikipedia through Google and this may even be their usual way of accessing a wiki.
- Men mention Wikipedia spontaneously as a source more often than women (30% and 17% respectively). The same applies to young people aged below 34 years of age (31%) and highly educated people (34%).



## Online databases, search engines and encyclopedias are used most

Which of the resources below do you sometimes use to look up information (facts)? (n=1,089)

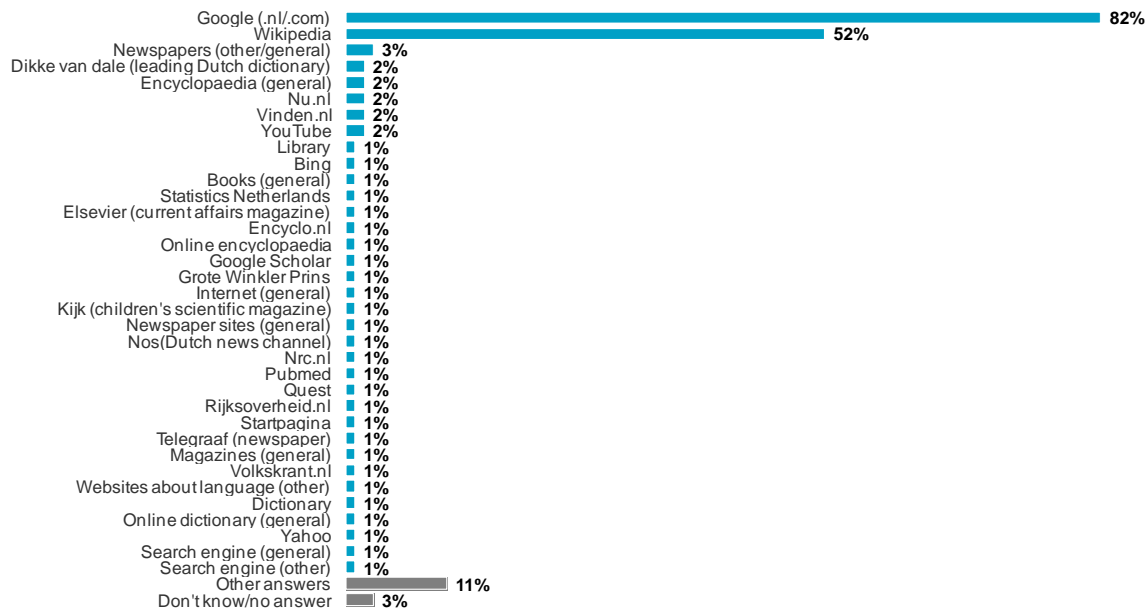


Google™

- The younger people are and the more highly educated they are, the more they use these two sources.

## Google and Wikipedia the most widely used sources by far

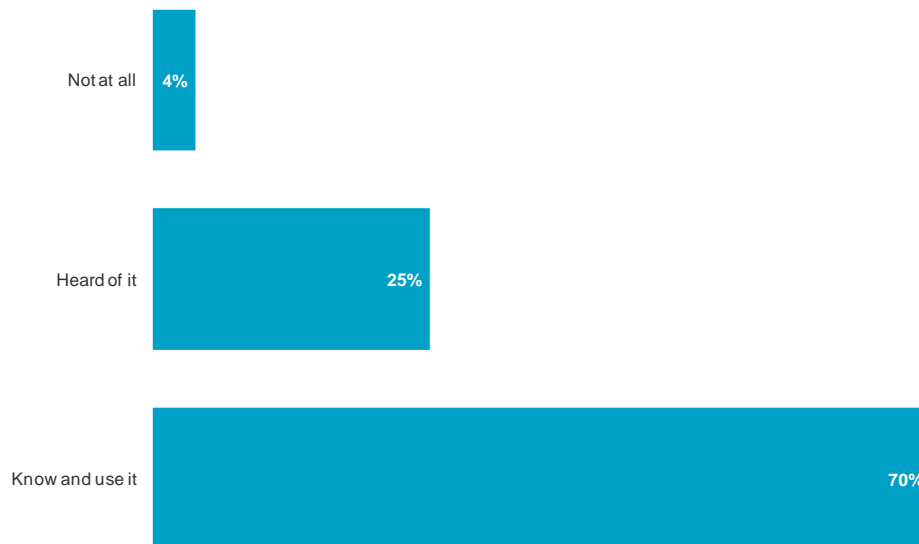
Which sources do you use most? (Basis-Uses at least one of the sources listed to look up information, n=945)



- Men (59%) use Wikipedia more often than women (45%). Young people under the age of 34 years also use it more often than the 55+ age group (65% and 35% respectively). The same applies to the highly educated group (65%).
- Otherwise, use patterns are varied. People mention newspapers and magazines (online and off-line) and also online databases such as the Dikke van Dale (a leading Dutch Dictionary), and the library.

## Seven out of ten use Wikipedia

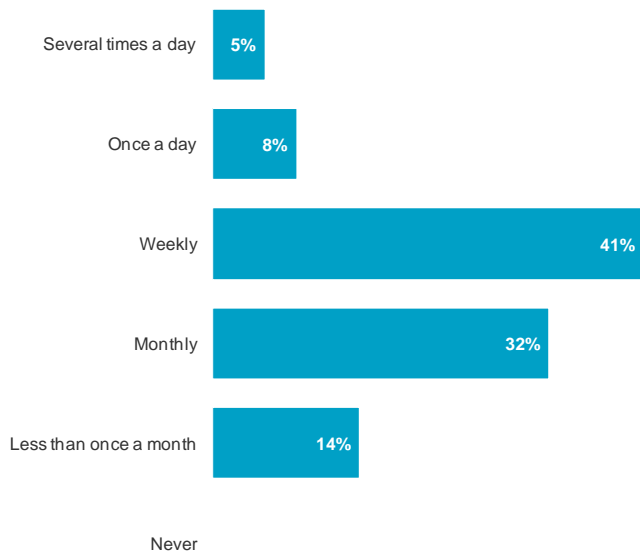
To what extent are you familiar with Wikipedia? (n=1,089)



- A quarter of Dutch people know about Wikipedia but do not use it. This group includes more women than men (30% and 21% respectively), more older people and more people with lower levels of education.
- 4% have never heard of Wikipedia at all.

## More than half use Wikipedia at least once a week

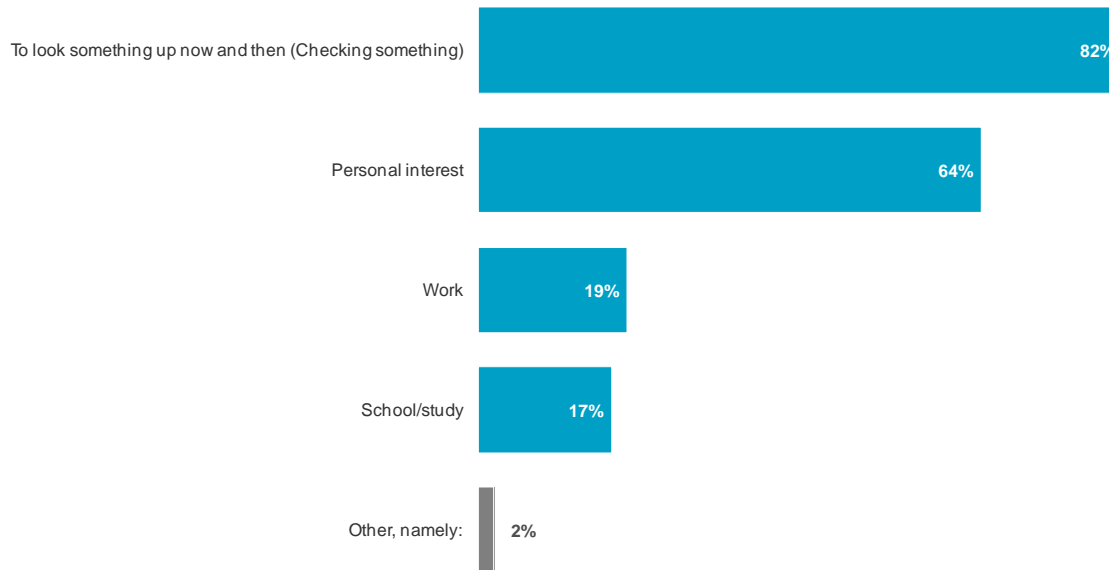
How often do you use Wikipedia? (Basis-Knows and uses Wikipedia, n=768)



Men use Wikipedia slightly more often than women and highly educated people also use it more often than people with lower levels of education.

## Wikipedia is mainly used to 'check something'

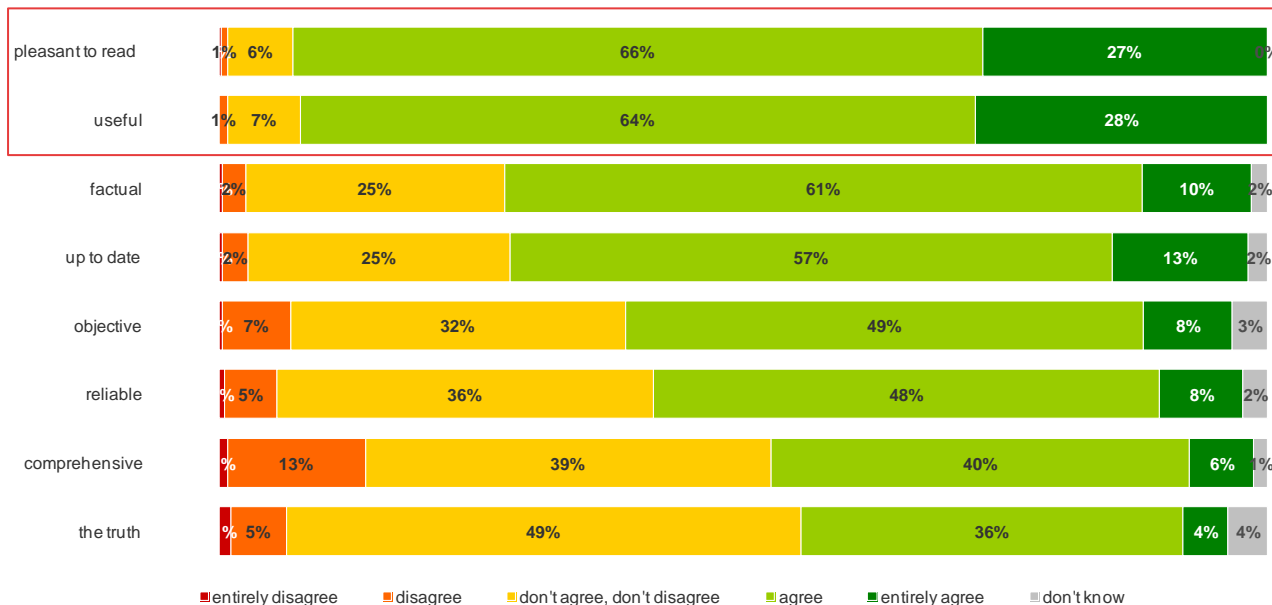
What do you usually use Wikipedia for? (Basis-Knows and uses Wikipedia, n=768)



- Two thirds also use Wikipedia due to personal interest. This percentage is highest in the 55+ age group (73%).
- One fifth use Wikipedia for their work. Almost one third of the highly educated group says that they use it for their work.
- 17% use Wikipedia for school/studying. This percentage is higher among young people (30%).

## Readability and usefulness of articles is very good

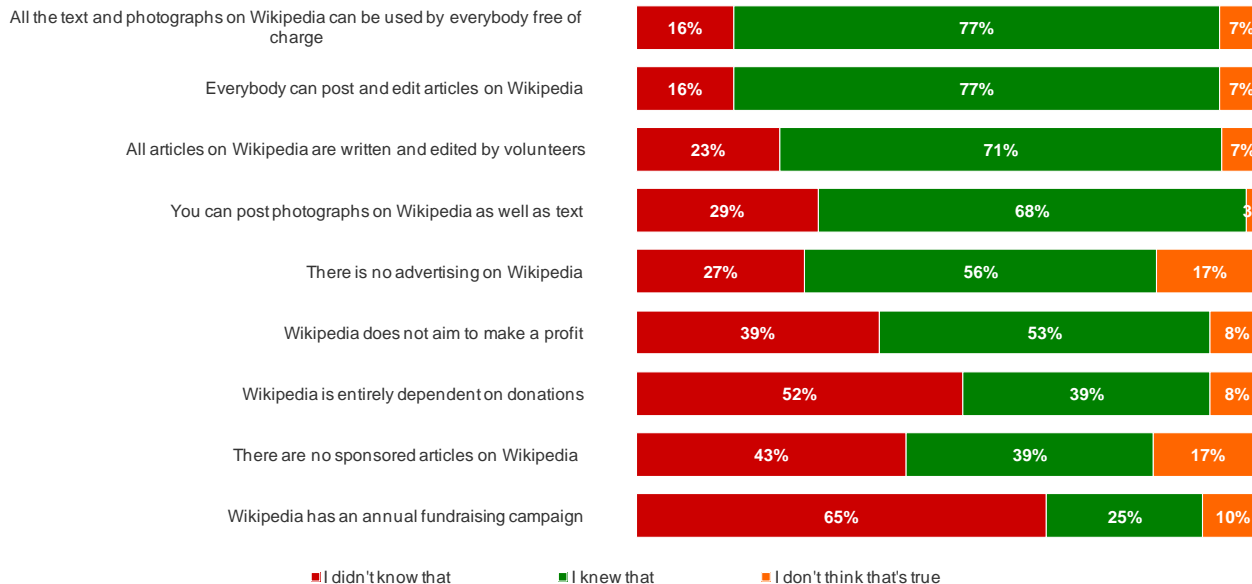
Wikipedia articles are: Basis - Knows and uses Wikipedia (n=768)



- People are less convinced about objectivity, reliability, comprehensiveness and truth.
- Men are more positive about these factors than women.
- The highly educated group is slightly more critical.

## Users are particularly poorly informed about Wikipedia financing

To what extent are you aware of the following? Basis - Knows and uses Wikipedia (n=768)

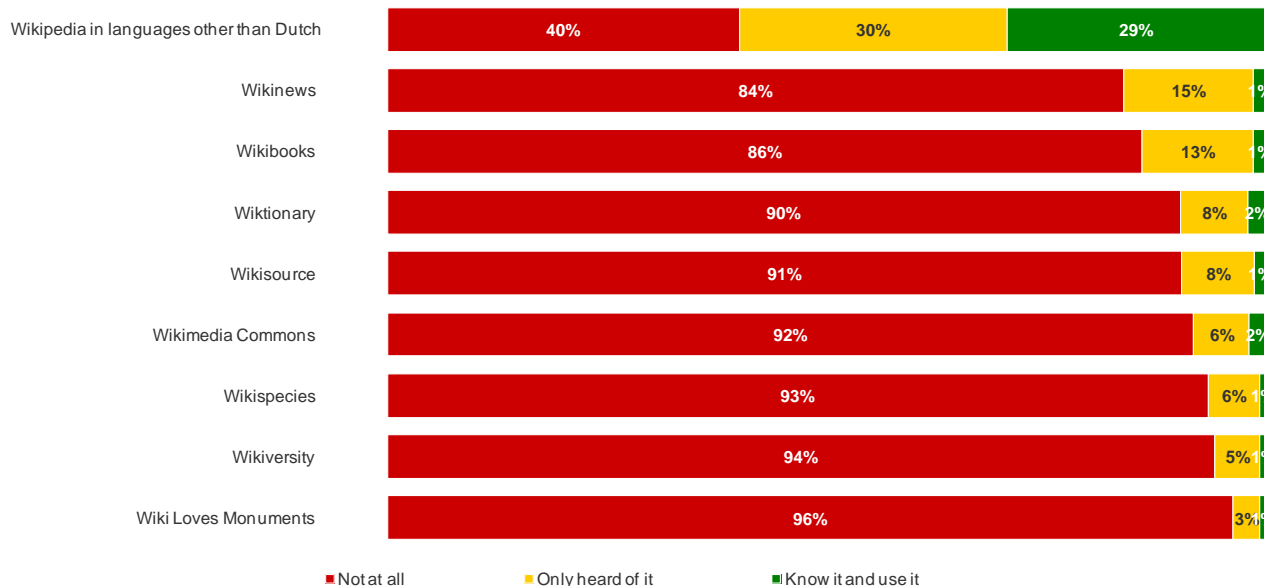


Men are generally better informed than women. The same is true of younger people and the highly educated.

All four of the areas about which users are least well informed relate to Wikipedia financing.

## General public has only a limited awareness of Wikimedia initiatives other than Wikipedia

To what extent are you familiar with ... (n=1,044)

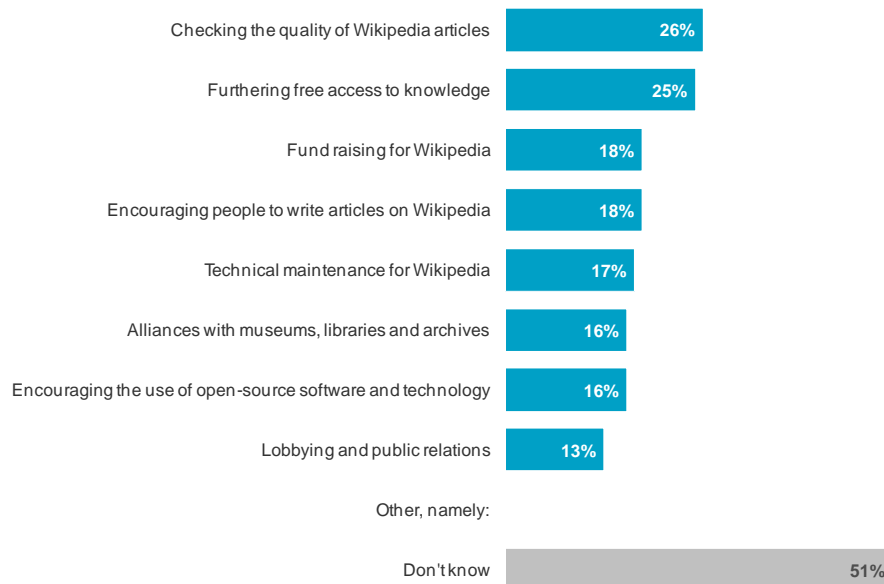


- Men know about and use the initiatives more than women.
- That also applies in most cases to younger people and more highly-educated people.



## Half do not know anything about Wikimedia activities

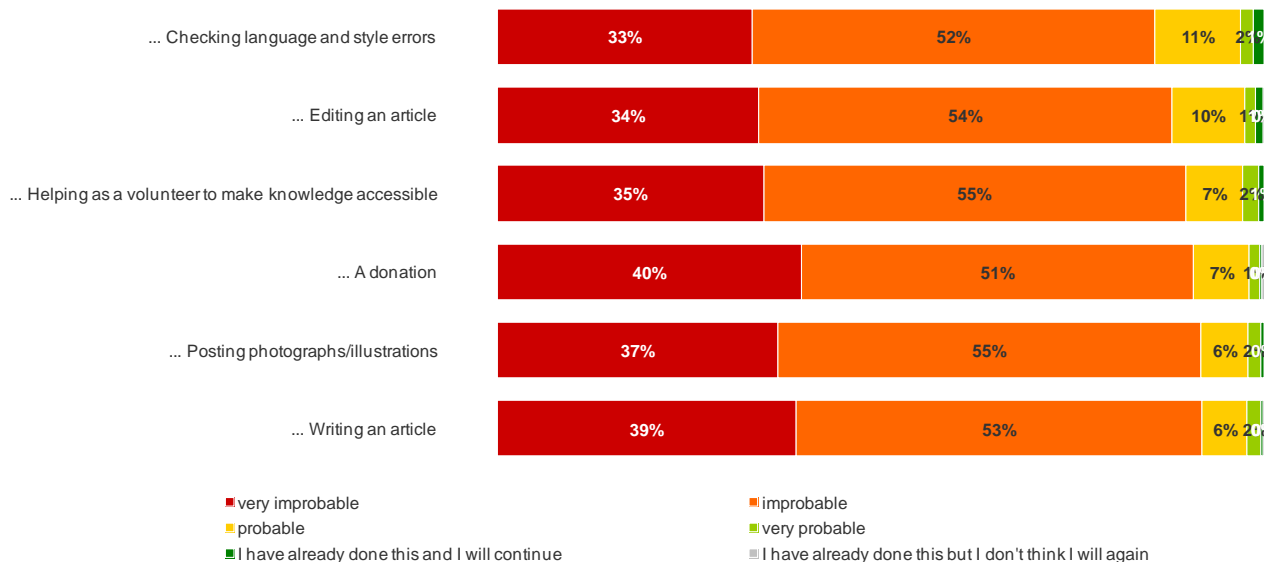
There is a Dutch Wikipedia Association. What do you think that association does? (n=1,044)



More highly educated people are slightly better informed about WMNL and/or its activities.

## Approximately 22% in total think they might make a contribution at some time

How probable is it that you will contribute to Wikipedia in the year to come in the form of ... (n=1,044)

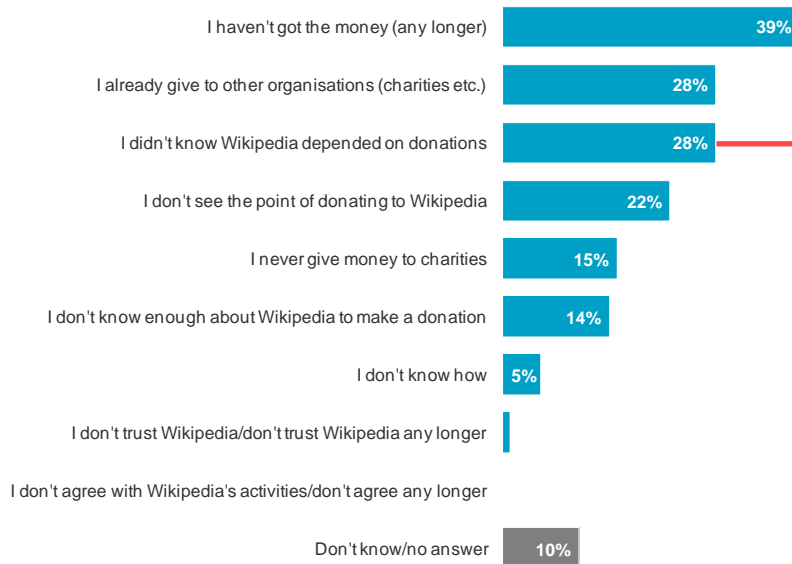


22% of Dutch people believe it is probable that they will make a contribution in the next year, in whatever form. In other words, 22% of Dutch people say they would want to contribute in at least one of the six ways.

In general, men are slightly more willing to contribute.

## Lack of financial resources main reason not to make a donation

What are your reasons for not donating to Wikipedia/not donating any longer/hesitating to do so? (Basis-Probably won't donate to Wikipedia next year, n=951)

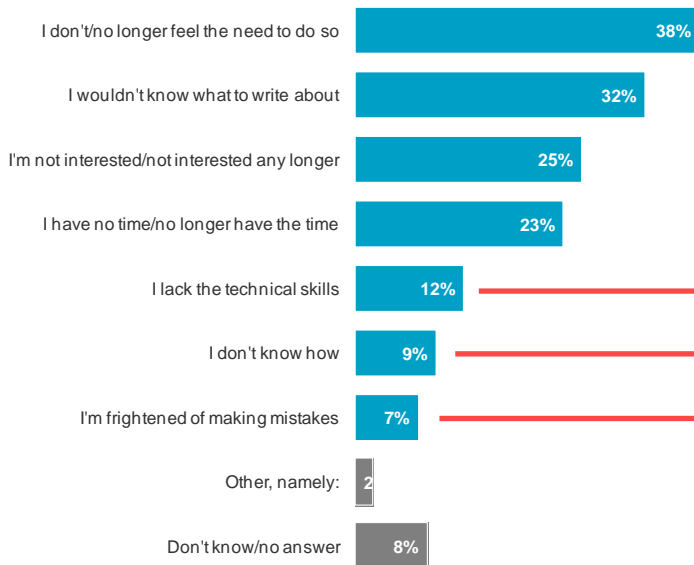


A large group (28%) are not aware that Wikipedia depends on donations.



## People do not feel the need to make a contribution or don't know what to write about

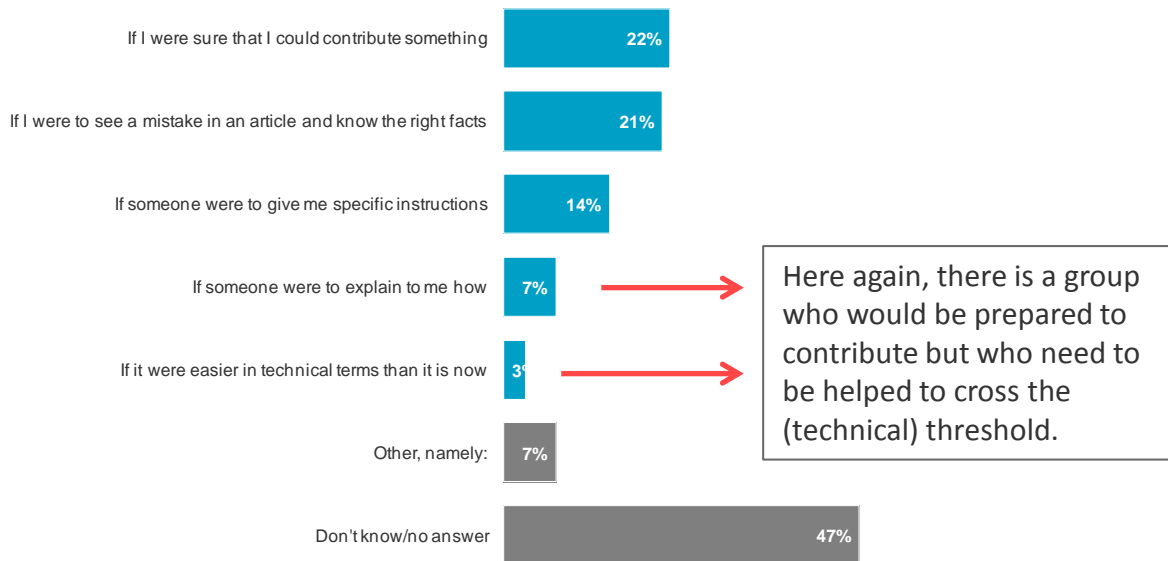
What are your reasons for not writing or editing an article/not doing so again/hesitating to do so? (Basis-Probably won't contribute by writing editing an article in the next year, n=976)



There is a group who would be prepared to contribute but who need to be helped to cross the (technical) threshold.

## Confidence about a good contribution or editing work are the main triggers

When would you write or edit an article/do so again? (Basis-Will probably not contribute in next year by writing/editing an article, n=976)



## Guide to analysis of Mentality target groups



Mentality is the Motivation value and lifestyle method that provides an effective description of target group classification and approach. Examining people's view of the world makes it possible to understand what motivates target groups, how trends arise and what the broader context is in which the target groups operate.



A clear picture of target groups' views of the world is needed to achieve a good return on marketing, communications and policy investments. Mentality helps to explain consumer behaviour and make pro-active approaches concrete.



In what follows, the Mentality model is used to explore promising target groups for Wikimedia.



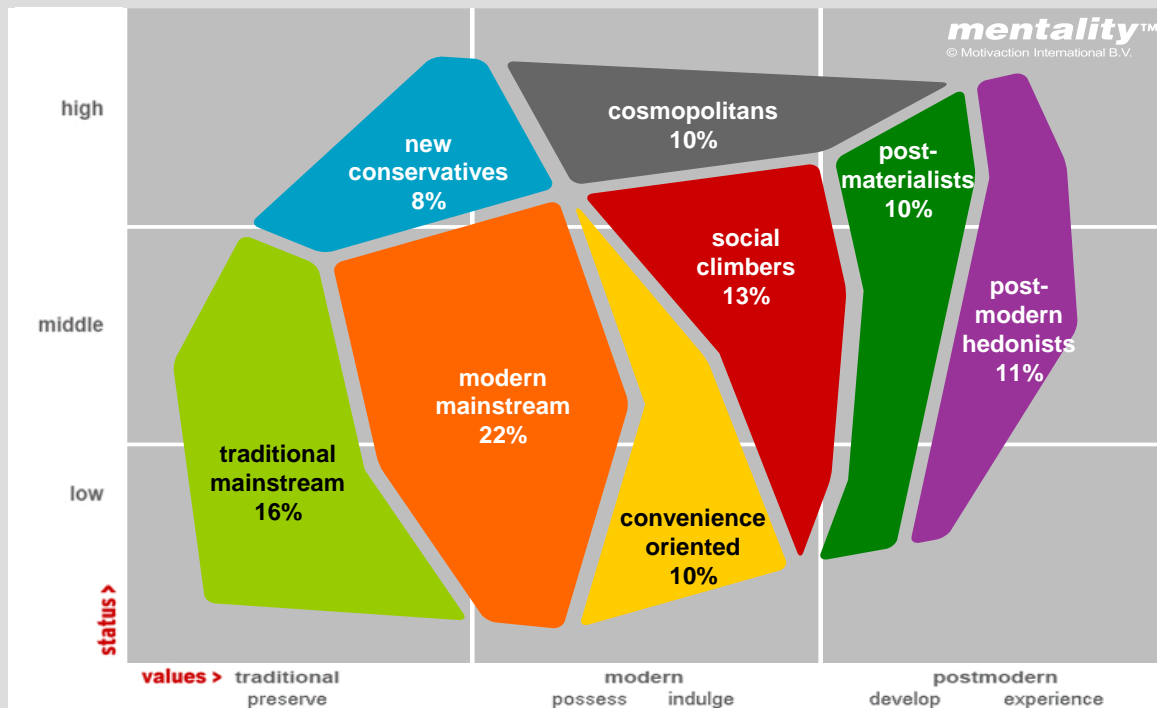
The first step is a description of the Mentality model in general, in combination with an overview of the various contexts. This starts with a brief general description of the contexts, followed by information about how people use Wikipedia.



The general information about the Mentality model and the different contexts are followed by the identification of promising contexts for Wikimedia. This is followed by a description of less promising target groups.



## Target groups based on Mentality. Distribution in the Netherlands



### Axes:

Status: education, work

Values: Objectives in life, lifestyle, work and achievement, leisure time, family and relationships.

Mentality is particularly suitable for describing groups. Individuals may well find they belong to several groups at the same time. Indeed, the test will identify factors belonging to all contexts; the context with the highest score is the one to which individuals will be allocated.

The distribution of the contexts in the Netherlands can be found here.



Mentality is the Motivation value and lifestyle research instrument. Examining people's view of the world makes it possible to understand what motivates target groups, how trends arise and what the broader context is in which the target groups operate. Mentality has emerged as an effective way of explaining and understanding people's behaviour. It is often more effective than the traditional approach based on age, gender, education and income. Mentality makes a distinction between eight groups who are described in brief here.

## Traditional mainstream

The moralistic, conscientious and status-quo oriented mainstream, that tries to hold on to traditions and material belongings.

## Modern mainstream

The conformist, status oriented mainstream that is looking for a balance between tradition and modern values like consumption and pleasure.

## Social climbers

The career driven individualists with a distinct fascination for social status, new technology, risk and excitement.

## Post-materialists

The socially critical idealists who want to actualise their selves, stand up against social injustice and stand up for the environment.

## New conservatives

The liberal-conservative upper class that want to give free rein to technological development, but resists social and cultural renewal.

## Convenience oriented

The impulsive and passive consumer who's main goal in life is to live a carefree, pleasurable and comfortable life.

## Cosmopolitans

The open and critical global citizens who integrate postmodern values such as self-actualisation and experience with modern values such as social success, materialism and hedonism.

## Post-modern hedonists

Pioneers of the experience economy in which experiment and breaking with social and moral conventions are aims in their own right.



The figure on the right shows that there are specific groups who know and use Wikipedia more than average. These are:

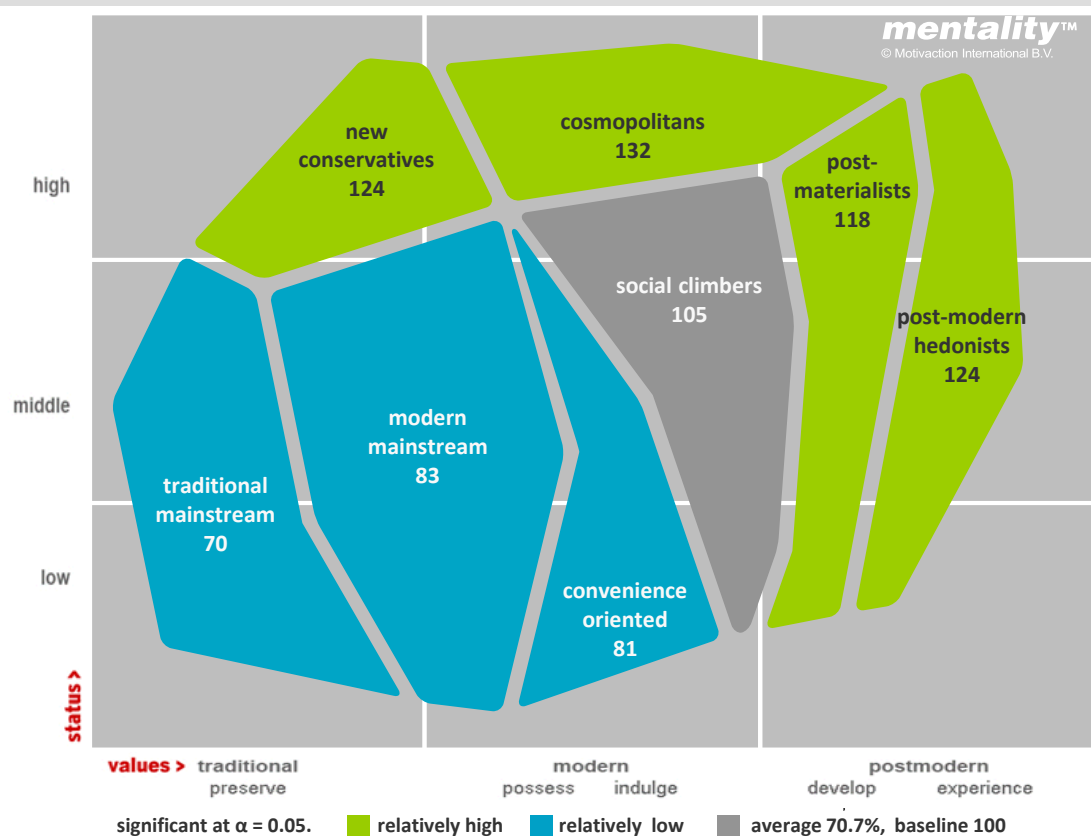
- New conservatives
- Cosmopolitans
- Post-materialists
- Post-modern hedonists

Groups who know and use Wikipedia less than average are:

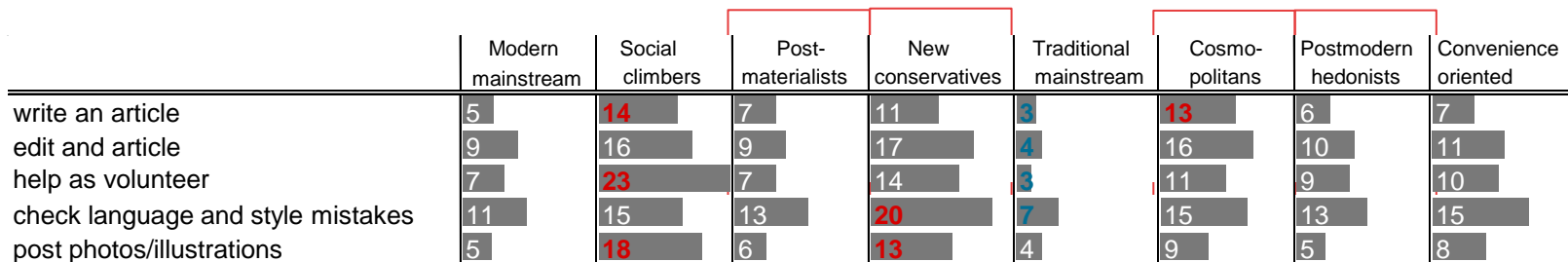
- Traditional mainstream
- Modern mainstream
- Convenience oriented

The social climbers group makes average use of Wikipedia.

The differences were calculated by comparing the individual groups with the rest of the groups as a whole.



## There are also differences in the way different groups want to make a contribution



The primary target groups differ slightly from one another in the way in which they would like to contribute. New conservatives want to check language and style mistakes, and contribute photos, more than average. Cosmopolitans want to write an article more than average. The post-materialists and post-modern hedonists do not have any anomalous preferences.

The analysis of the data based on mentality delineates different groups with different preferences. The analysis provides Wikimedia with guidance for making investments in marketing and communications more effective because it does not need to address the whole population but only specific, promising target groups.

## Gender

Gender (n=1,089)

Man

50%

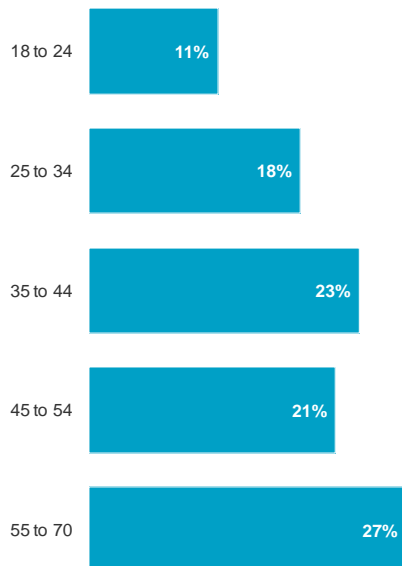
Woman

50%



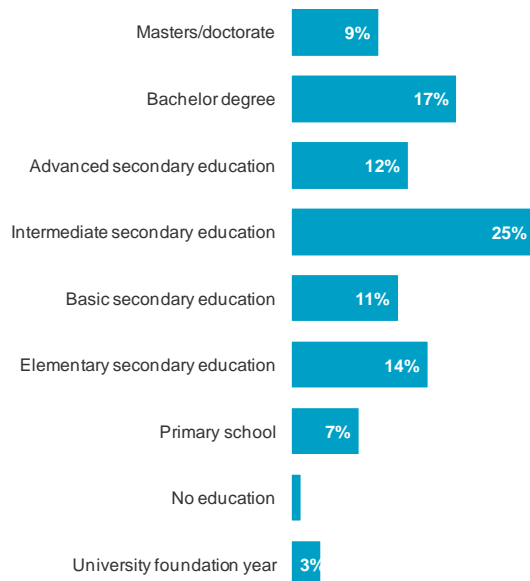
## Age

Age (n=1,089)



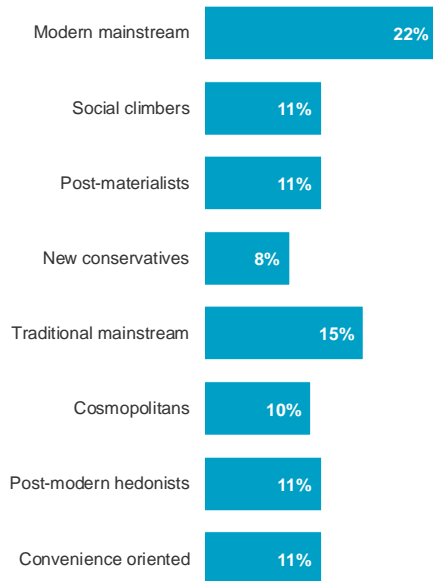
## Education

Highest level of education completed (n=1,089)



## Mentality

Mentality (n=1.089)







## Technical research information - quantitative

- Fieldwork
  - The fieldwork looking at users took place between 21/01/2013 and 05/02/2013 and the survey of members and contributors was conducted between 19/01/2013 and 05/02/2013.
- Sample selection method
  - From the Motivation StemPunt panel (users)
  - Establishing a link 'behind' the Wikipedia site (contributors)
  - Wikimedia itself approached all the members
- Incentives
  - The respondents received a small fee as an expression of gratitude for their participation in the survey
- Weighting
  - The user data was weighted (see annex relating to weighted and unweighted data), with the Mentality Calibration File being used as the framework for secondary weighting. That calibration has been weighted in terms of socio-demographic data on the basis of the Statistics Netherlands Gold Standard
- Response to online survey
  - An invitation e-mail was sent to 2750 users during the fieldwork. On the final date of the fieldwork (see Fieldwork), the required number of questionnaires had been completed and Internet access to the questionnaire was terminated.
  - An intermediary page was used for members and contributors so that it was not possible to determine how many people had been invited. We do know that 843 people started to complete the questionnaire. On the final date of the fieldwork (see Fieldwork), the required number of questionnaires to be completed by contributors had been achieved, the required number of questionnaires to be completed by members had also been achieved, and access to the questionnaire was terminated.
- Retention of primary research files
  - Primary research files such as completed written questionnaires, minutes, visual and sound recordings are kept by Motivaction for a period of 12 months after the completion of the research.
- Other technical research information
  - Other technical research information and a copy of the questionnaire used for this survey are available to the client upon request.





## Weighted and unweighted user data

| Characteristics   | Unweighted |    | Weighted |    |
|---|------------|----|----------|----|
|   | N          | %  | N        | %  |
| <b>Age</b>  |            |    |          |    |
| 18 to 24 years of age                                       | 100        | 9  | 122      | 11 |
| 25 to 34 years of age                                       | 156        | 14 | 192      | 18 |
| 35 to 44 years of age                                       | 196        | 18 | 256      | 23 |
| 45 to 54 years of age                                       | 245        | 22 | 225      | 21 |
| 55 to 70 years of age                                       | 392        | 36 | 294      | 27 |
| <b>Educational level</b>                                    |            |    |          |    |
| High (university)   | 302        | 28 | 290      | 27 |
| Intermediate (advanced secondary education)                 | 525        | 48 | 561      | 52 |
| Low (Basic secondary education/primary school/No education) | 262        | 24 | 238      | 22 |
| <b>Gender</b>   |            |    |          |    |
| Male  | 552        | 51 | 541      | 50 |
| Female  | 537        | 49 | 548      | 50 |

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A blurred background image showing several hands in motion, suggesting a presentation or a group discussion. The hands are wearing light-colored sleeves, and one hand in the foreground has a ring on the ring finger.

# **motivaction**

## **research and strategy**

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