

Brand Health Tracker

Wave 4 | Communications | Dec 2023



WIKIMEDIA
FOUNDATION



Wikimedia Brand Health: Stream 4 Executive Summary

Communications Department
Worldwide

Methodology

Regions Covered	Sample & Fieldwork	Differences from Stream 3
Sub-Saharan Africa	<p>900 respondents per country</p> <p>Representative of online populations, using interlocked age and gender quotas</p> <p>Age 18+</p> <p>Margin of error for each country +/- 3%</p> <p>Fieldwork dates: September 29th-October 13th 2023</p> <p><i>Note, this tracker runs bi-annually</i></p>	<p>Different set of countries, with exception of US and India</p> <p>Question areas added:</p> <ul style="list-style-type: none">• Additional donations drivers questions• Added Bard to list of AI platforms, removed ChatSonic and Bing Chat• Added question on social actions people have taken
East, South East Asia & Pacific		
North America		
South Asia		
Middle East & North Africa		
Northern & Western Europe		
LatAM & Caribbean		
Central & Eastern Europe & Central Asia		

What we're measuring in this study: The strength of 3 brands

**The Wikimedia
Foundation as a Free
Knowledge
Movement**

**The Wikimedia
Foundation as an
Organization**

**Wikipedia, as a
project brand**

The three pillars of measuring a brand

1. PRESENCE

Creating presence in people's memories and in their lives

The '**mentally availability**' (i.e. coming to mind easily) of a brand is a key outcome of successful marketing and is predictive of engagement (e.g. usage).

And being **present in people's lives** helps keep those memory structures fresh, and, seeing the brand (e.g. Wikipedia) close to using the category can be predictive of brand usage or engagement.

2. PURPOSE & PROPOSITION

Having a purpose or proposition that resonates with people

Part of the role of marketing is giving people reasons to use and support the brand.

Ensuring people know its **values** and what **needs** it delivers on helps drive engagement.

And it's important people are clear on how it's **different** from competitors on these values and needs.

3. PERSUASION

Converting awareness to consideration, usage and advocacy

The ultimate outcome of brand building is that that once people know the brand, **they're interested in it, use it, and support it.**

This is driven by both how present the brand is, and the relevance of the proposition and brand purpose.

This '**funnel**' of conversion from awareness to advocacy is a key measure of how well the brand's doing.

The metrics framework we've used

PRESENCE

Presence in people's minds and in the world

Unaided Awareness

Measures brand or movement saliency by asking people which brands/movements spontaneously come to mind.

Exposure

How much and where people feel they're seeing the brand or movement in media, culture and elsewhere

PURPOSE & PROPOSITION

What people associate with the brand or movement

Associations

Measures the emotional and functional associations people have with the brand or movement in the context of the 'category' (e.g. other non-profits, knowledge platforms), helping capture whether people understand its values or proposition

PERSUASION

How much people move from awareness, to consideration, to engagement, and advocacy

Aided Awareness

Measures how many people consciously know the brand or movement name, when prompted. For most people, having heard of the brand is a precursor to using it.

Familiarity

Measures how well people feel they know the brand. An increasing sense of knowing the brand is linked to a higher likelihood to consider using it (if that familiarity is positive).

Consideration

How much people would consider using the brand. A gap between awareness and consideration may mean that the proposition isn't compelling enough.

Usage

The size of each brand's user base, here measured specifically for Wikipedia and competitors, giving a cross-category perspective. Note this is self-reported data.

Net Promoter Score

Measures the level of likely advocacy among people, reflecting the strength of the overall user experience or reputation of the brand.

Stream 4 Performance 1 Pager, Global View (All Markets)

PRESENCE

WMF

Unaided Awareness 1% Flat

WIKIPEDIA

Unaided Awareness 20% ↓ 4pp

Exposure 70% ↓ 6pp

PERSUASION

WMF

Aided Awareness 23% ↓ 2pp

Familiarity 15% ↓ 1pp

WIKIPEDIA

Aided Awareness 77% ↓ 6pp

Familiarity 66% ↓ 8pp

Consideration 36% ↓ 9pp

Usage 45% ↓ 11pp

NPS 16 ↓ 6pp

Monthly uniques 1.6BN

Pageviews 10.5BN

Est. Readership 445MM

Likelihood to edit 26% ↑ 1pp

Ever edited 9% ↓ 1pp

Likelihood to donate 15% ↓ 3pp

Ever donated 6% ↓ 1pp

PURPOSE & PROPOSITION

WMF

REPUTATION

Trust to be honest and unbiased (top box) 41% ↓ 1pp

Has good track record as a trusted organization 24% ↓ 1pp

RELEVANCE

Represents, serves & belongs to everyone 32% ↓ 1pp

Understands people like me 23% ↑ 5pp

MISSION

Has a clear mission 30% ↓ 2pp

WIKIPEDIA

REPUTATION

Trust to be honest and unbiased (top box) 40% ↓ 3pp

Reliable, trustworthy and always up to date 29% ↑ 7pp

RELEVANCE

Quality information available on a variety of topics 33% ↓ 21pp

Always the top search result 26% ↑ 1pp

EXPERIENCE

Easy to navigate on desktop and mobile 27% Flat

Uses images or photos 26% ↓ 1pp

Uses video 7% ↑ 1pp

Five key learnings from Stream 4

1.

Different audiences for mis/dis versus free knowledge

Ukrainians and older people more likely to feel mis/dis is a concern; Kenyans, South Africans and younger people more concerned with free knowledge

2.

Concept of 'free' most associated with WMF, but transparency concerns

The word 'free' comes up most when people are asked what comes to mind when thinking about WMF - e.g. free content, free knowledge. However still little knowledge about who's behind WMF and how funding used.

3.

Though still relatively strong, Wikipedia brand weaker in this Stream

Across the funnel and on NPS Wikipedia underperforms vs. previous Streams. However, it remains a strong brand relative to other platforms.

4.

Similar to WMF, Wikipedia associated with 'free', but lacks transparency

When people think of Wikipedia the word most often used is 'free' - free to use, free information. However, the brand is also associated with a lack of transparency about who funds it, and has associations around 'bad' and 'fake' info.

5.

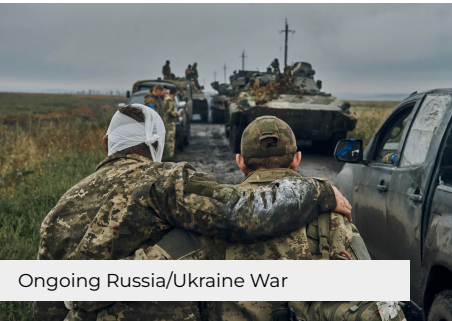
Potential donors continue to want more info on funding used

When asked what would prompt them to donate, people are most likely to say they want more information or knowledge - about how donations are used, about what WMF does, and about how to donate.

02

**The Free
Knowledge
Movement**

Concerns about free knowledge exist within the broader cultural and news context - *recent news stories*



Ongoing Russia/Ukraine War



India Protests Against Arrests of Journalists



Political Tensions with the UN in DRC



Fight against harassment of women in US



Climate Protests in Netherlands



Extreme Weather Event, Burning Man in US



Ongoing Recession Concerns, Germany

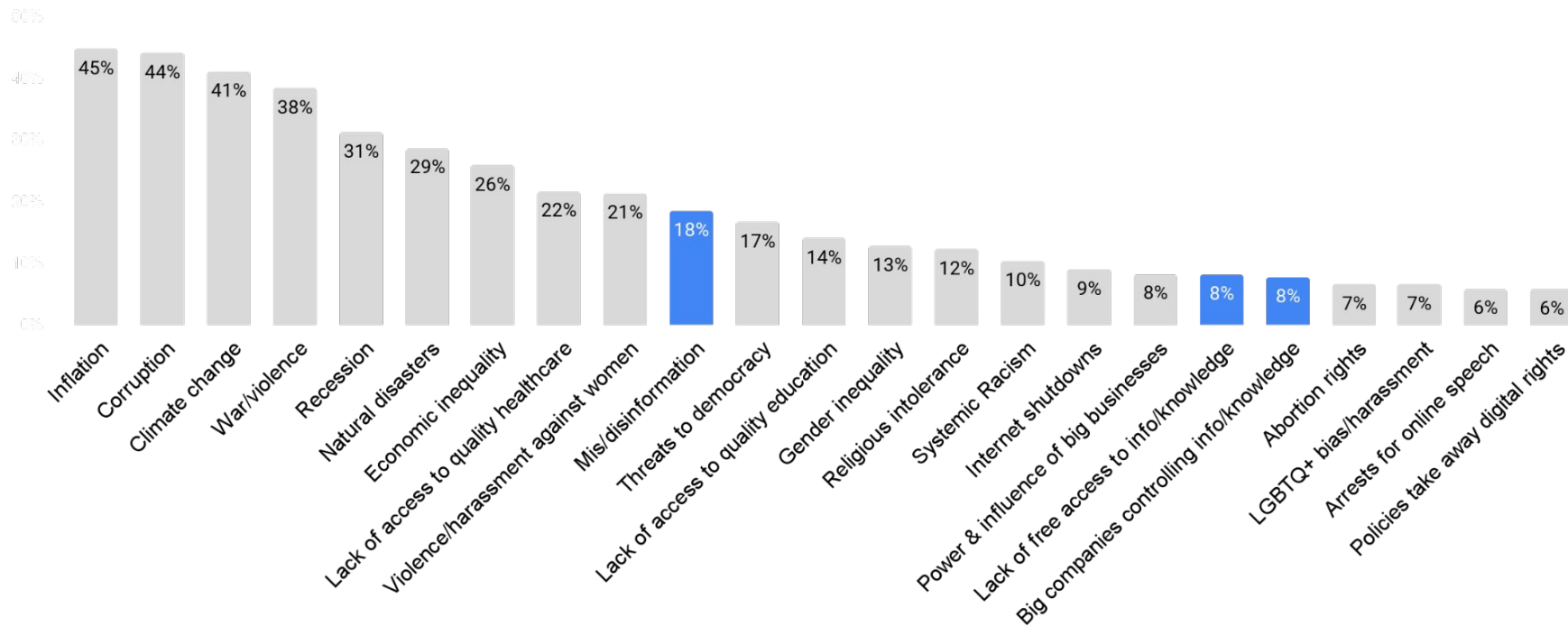


Democracy Concerns in Indonesia

Note the Gaza/Israel conflict started towards the end of our fieldwork

Most concerning right now: Inflation, corruption, climate change and war/violence

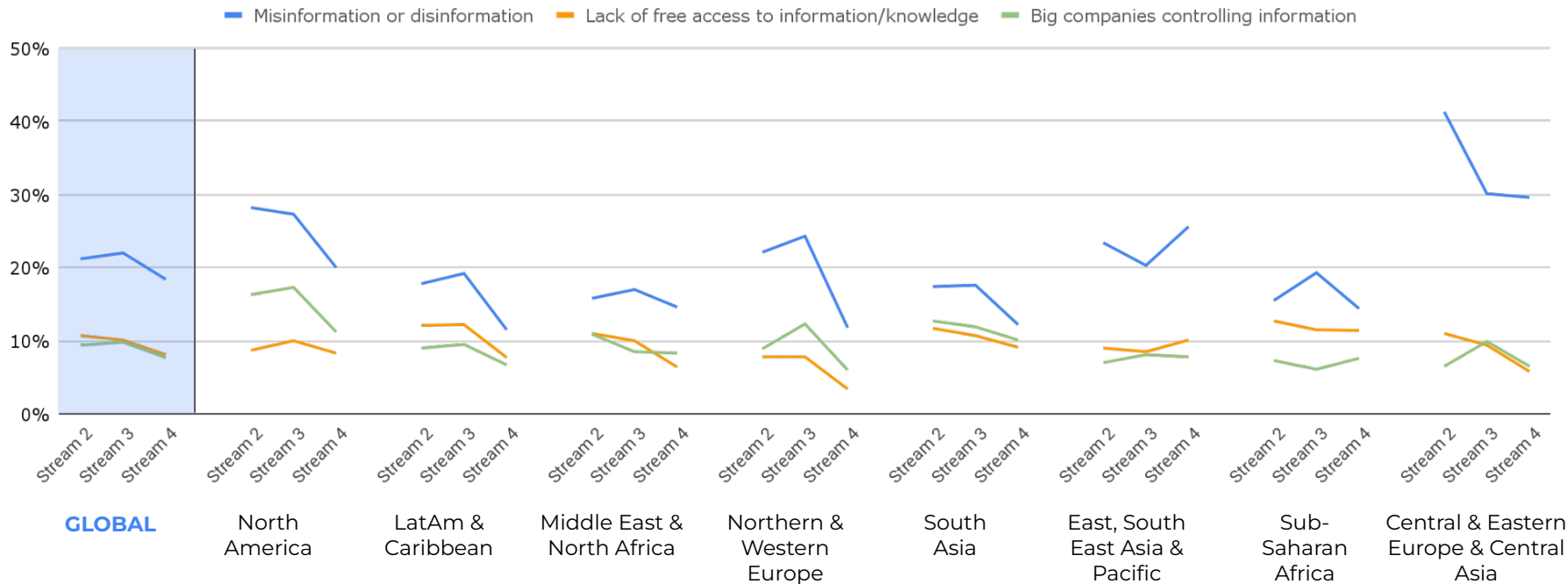
% stating issues most concerned about



Concerns about mis/dis and knowledge access lower in this Stream

Note: Question not asked in Stream 1

% stating issues most concerned about



In each country different global and local movements are salient

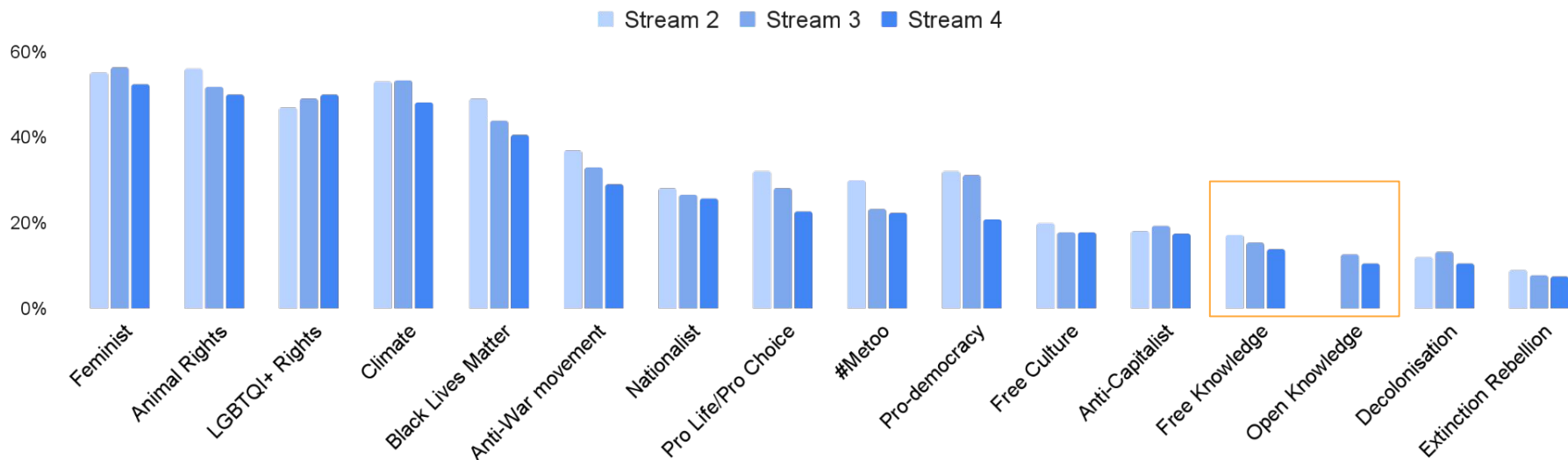
Movement salience (unprompted mentions)

Unprompted movements, top 5 ranked movements mentioned in each country

US	EG	IN	ZA	AR	FR	UA	CZ	TW	MY	KE	CO
BLM	Human Rights Movement	Chipko Movement	BLM	Evita Movement	Yellow Vests	People's Movement	Children of Earth	Sunflower Movement	Clean Movement	BLM	Feminist Movement
Climate Movement	Women's Rights	Climate Movement	Equal Education	Feminist Movement	Pension Reform	Come Back Alive	Green-peace	228	BLM	Climate Movement	Labor Movement
Abortion Rights	April 6th	Bachao Andolan	Climate Movement	Labor Movement	Climate Movement	Stop Corruption	Feminist Movement	White Paper	Human Rights Movement	Human Rights Movement	Climate Movement

Awareness of the Free Knowledge movement lower vs previous Streams

% stating awareness of each movement (prompted, ie from a list)

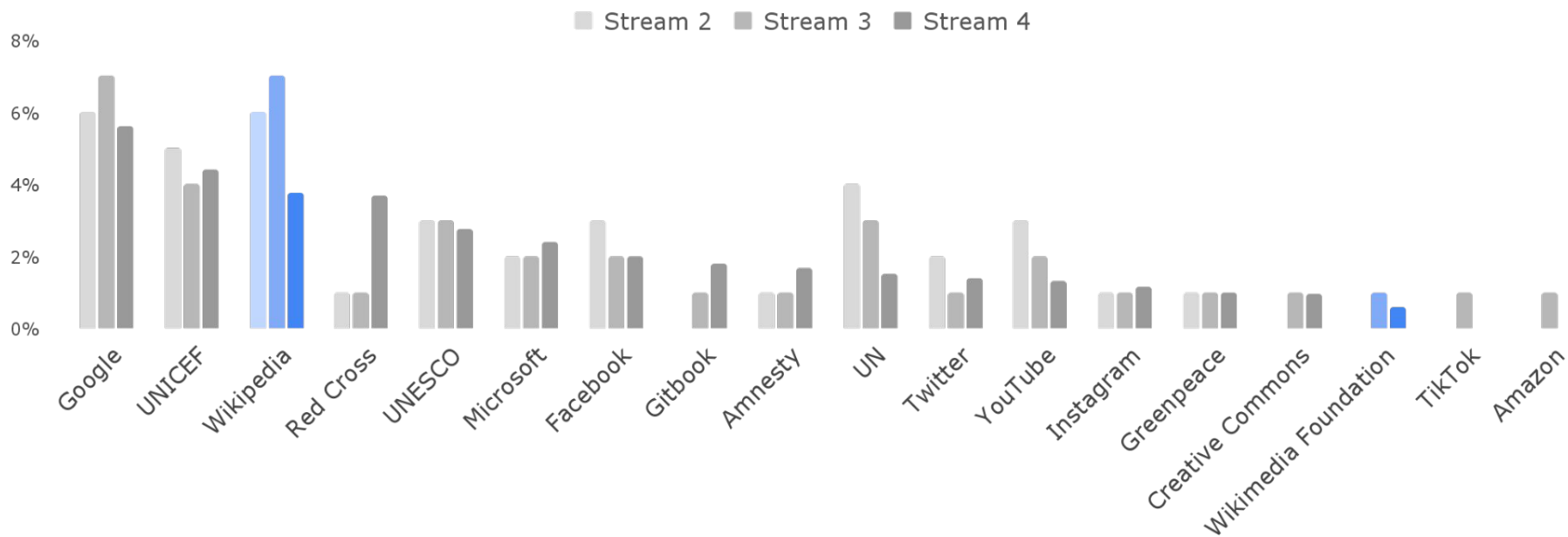


03

**Wikimedia
Foundation
Brand Health**

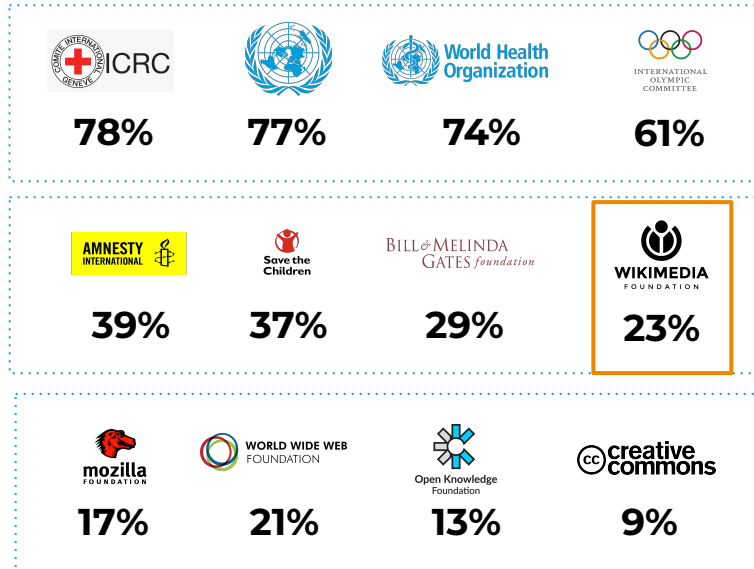
WMF isn't top of mind for people, Red Cross higher this Stream

% saying the following organizations that support free knowledge come to mind (unprompted)



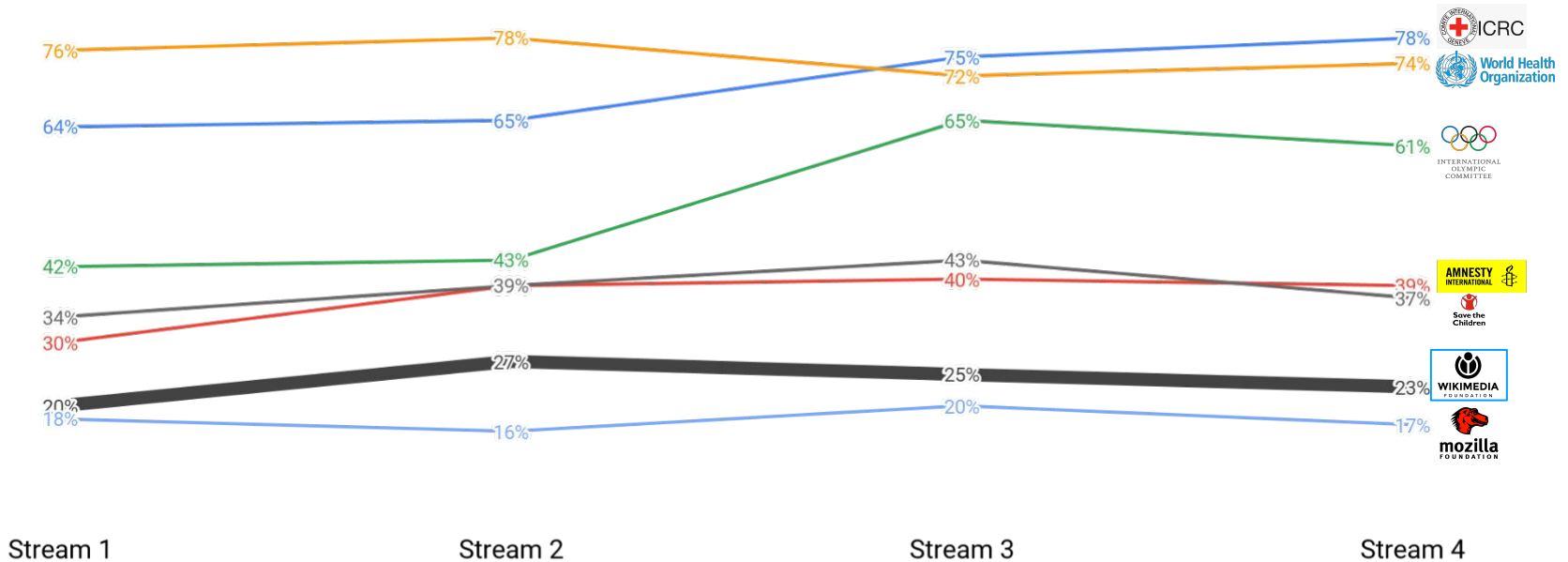
When prompted, more people have heard of WMF, though awareness still relatively low

% stating they've heard of



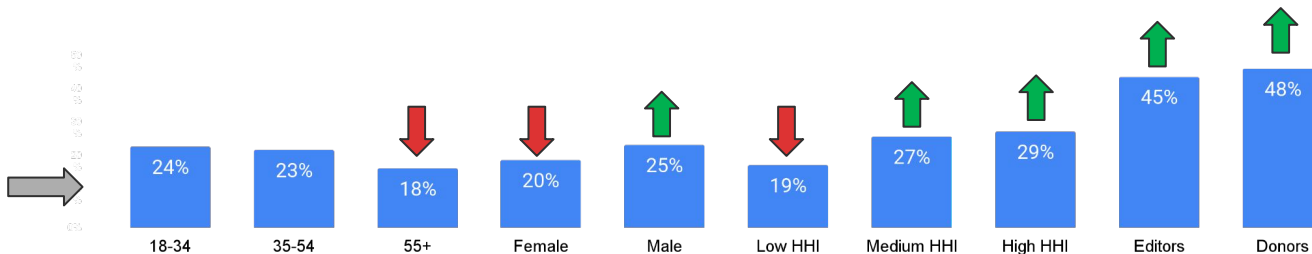
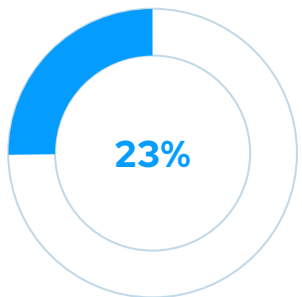
WMF awareness has remained consistent across Streams

% stating they've heard of



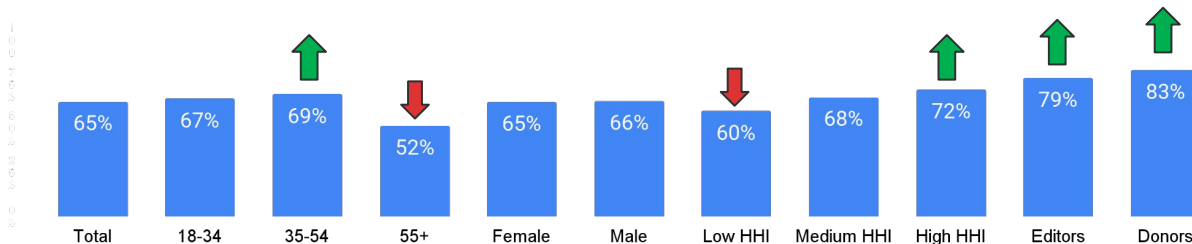
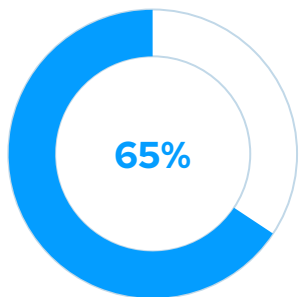
WMF awareness higher among men and higher income people

% stating they've heard of



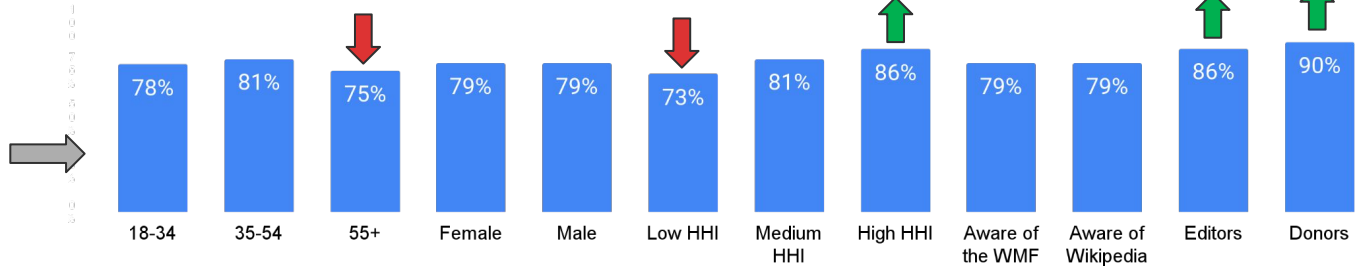
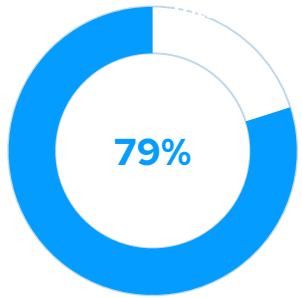
Higher income people and those <55 more familiar with WMF

Top 2 box familiarity (%), out of those aware of each organization



High income people, and <55s trust WMF more

% who trust WMF (top 2 box)



Base: Respondents aware of Wikimedia Foundation
Q19a. How much do you trust each of the following organizations to be honest and unbiased?

↑ ↓ Indicates significant difference vs Total sample at a 95% confidence level

People prefer WMF associated with 'The Free Knowledge Movement'

% indicating what they think the Wikimedia Foundation should be associated with

43%

The Open Knowledge
Movement

45% in Stream 3

53%

The Free Knowledge
Movement

50% in Stream 3

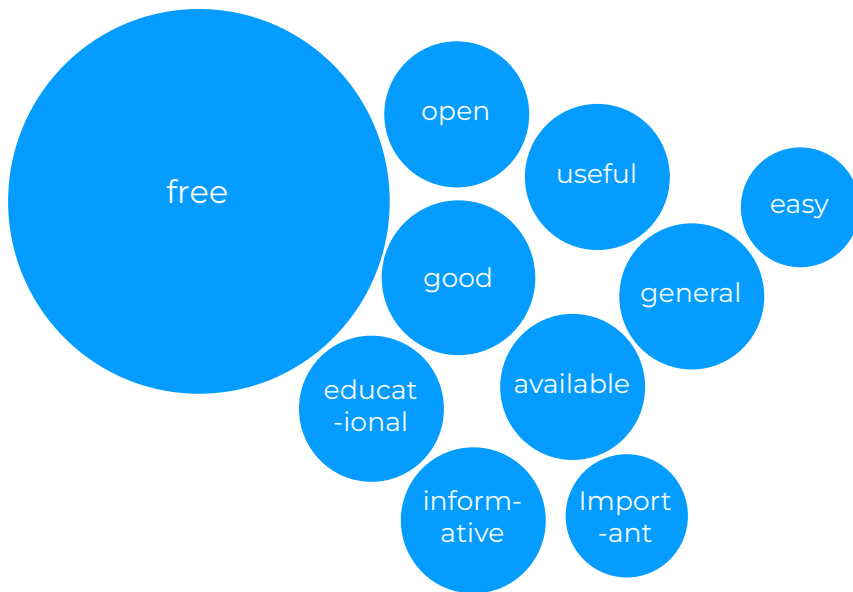
5%

Neither of these

5% in Stream 3

People think of 'free', 'open', 'educational', 'good' when it comes to WMF

Adjectives used to describe WMF (top 10)



"A global movement to bring free educational content to the world."

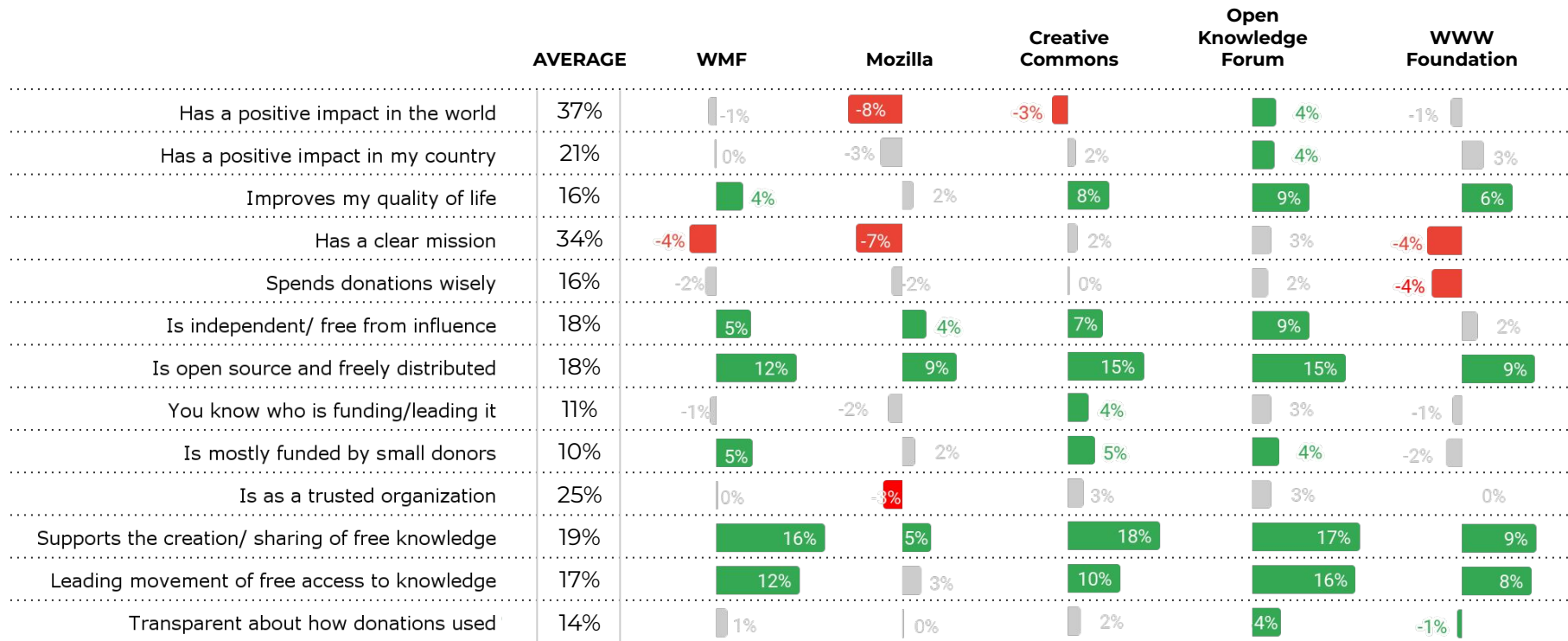
Woman, 65+, Malaysia

"It is a great institution to spread knowledge for free in all fields and sciences"

Woman, 35-44, Taiwan

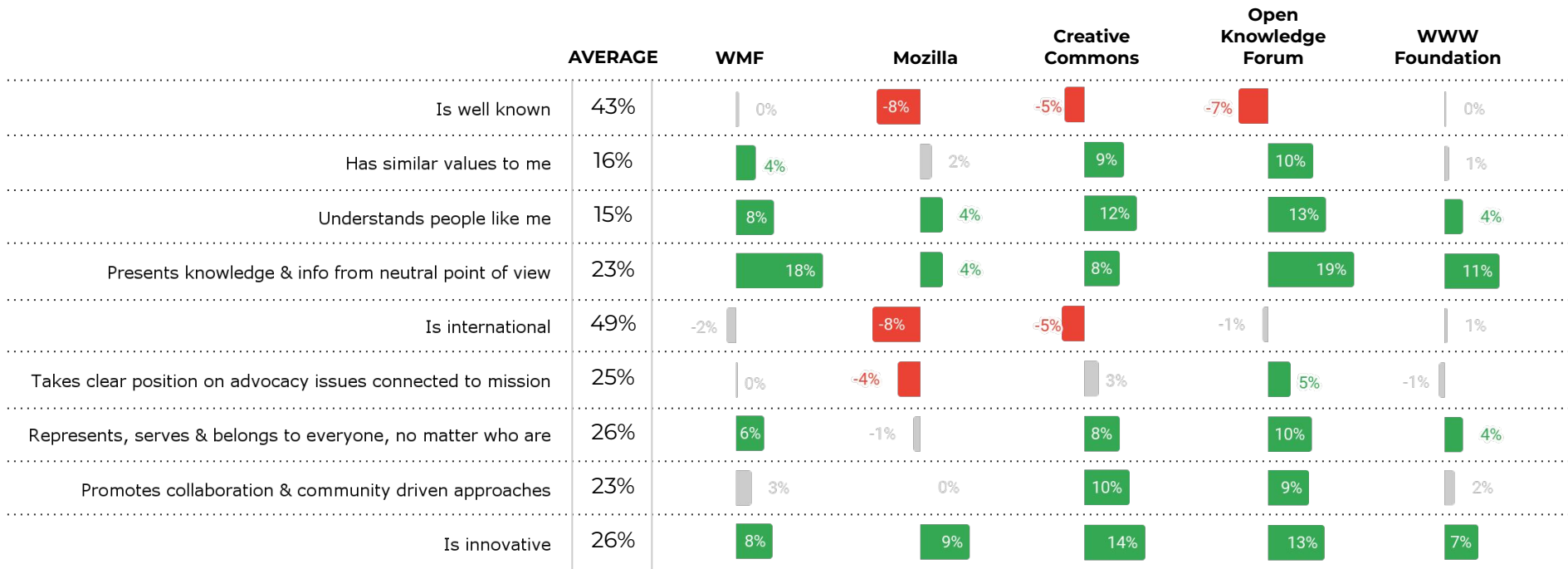
Compared to other organizations, WMF performs strongly on supporting free knowledge movement & open source, but weaker on clear mission

Bars are percentage point difference from average across all organizations (includes organizations not shown here), among aware of each organization



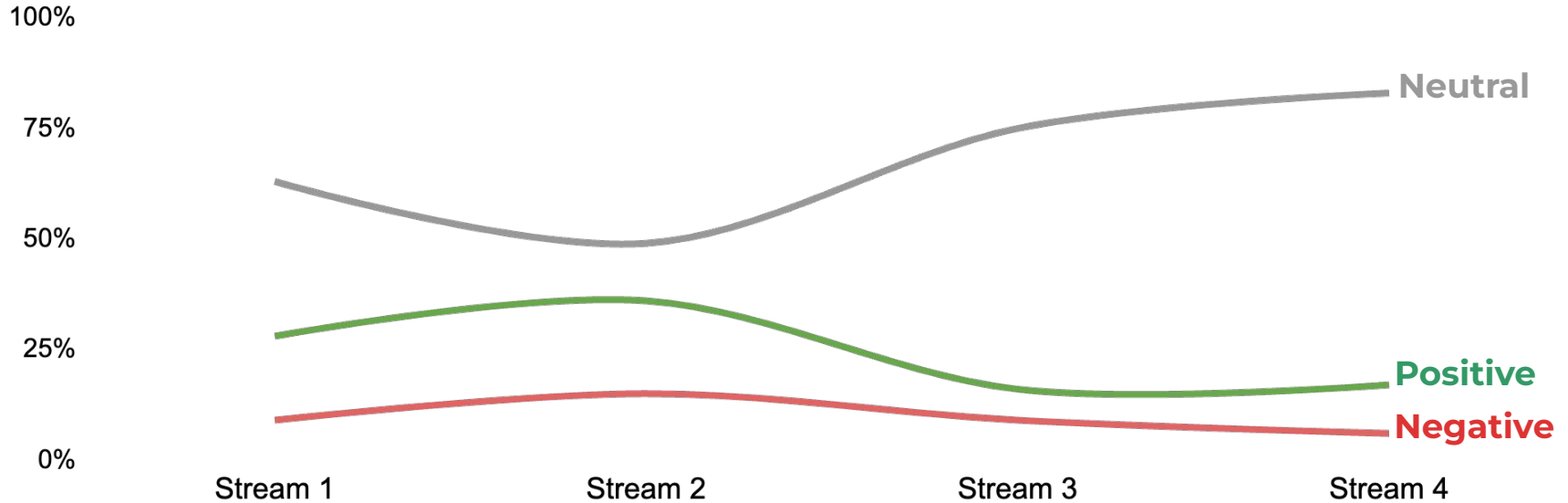
WMF seen as more neutral than other organizations

Bars are the percentage point difference from the average across all organizations, which includes additional organizations not shown here



WMF social sentiment more positive than negative, though more neutral recently

Wikimedia Social Sentiment (From Social Listening Analysis)



04

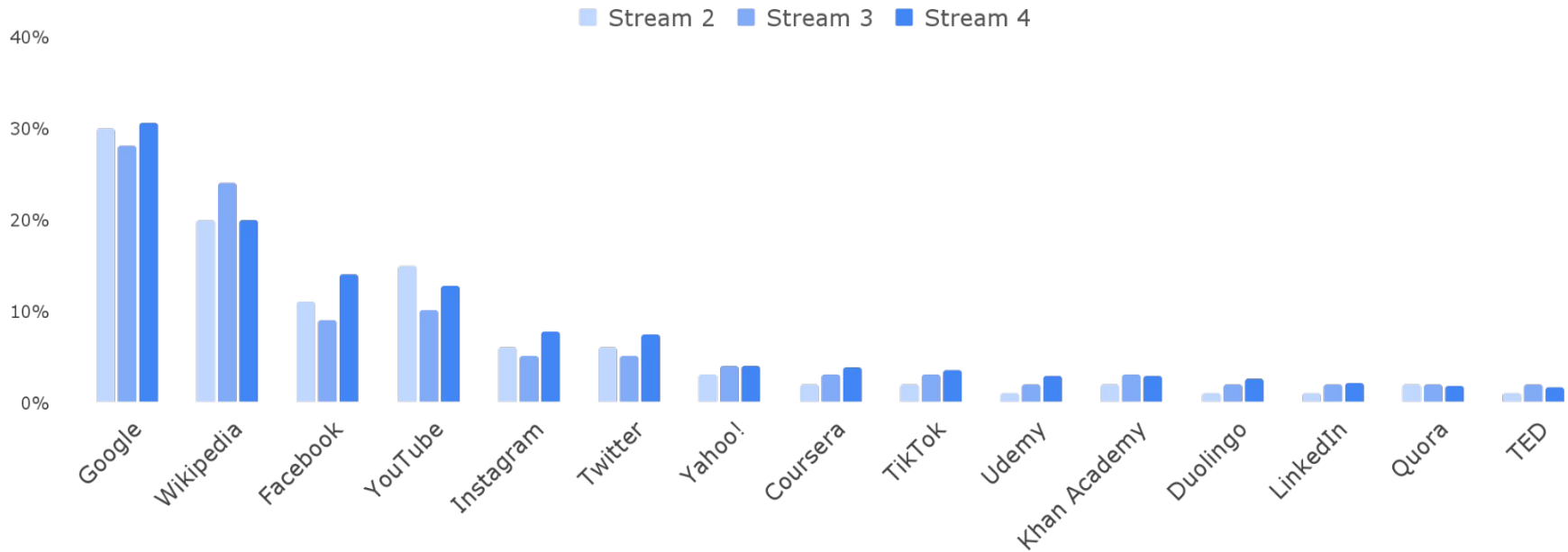
**Wikipedia
Brand Health**

Presence

How present the brand is in people's minds and in the world

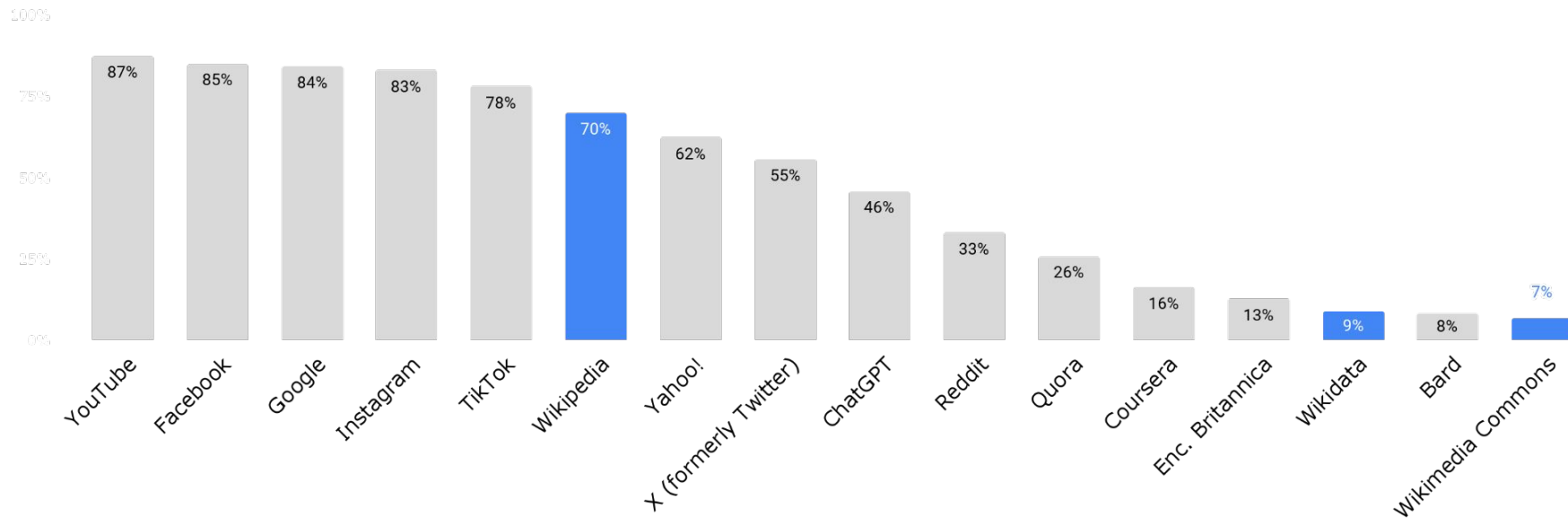
Wikipedia continues to enjoy a high level of brand salience

% saying the following platforms come to mind (unprompted)



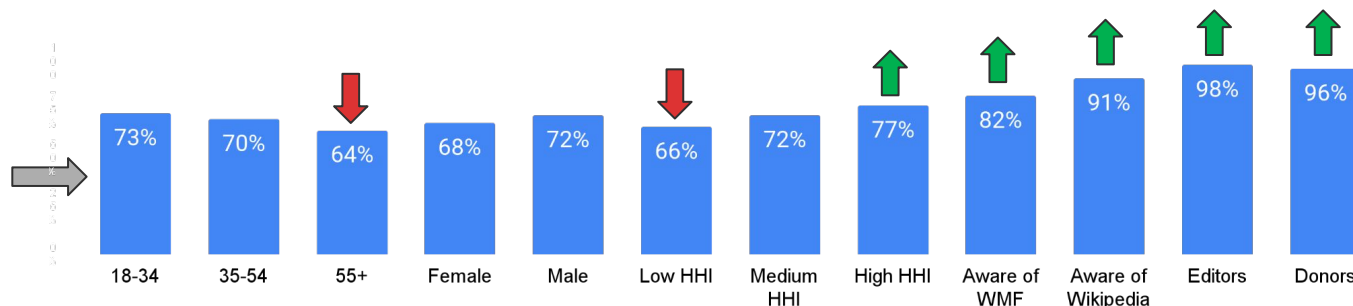
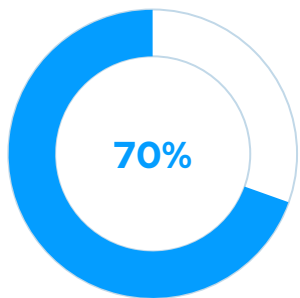
Wikipedia has good presence, though lower than other major platforms

% brand exposure for brands (people who have seen the brand recently in any media)



Higher income people more likely to have seen Wikipedia recently

% brand exposure for Wikipedia



Base: All respondents
Q5 WHERE do you remember seeing, hearing or reading about each of these websites or apps recently, if anywhere?



Indicates significant difference vs Total sample at a 95% confidence level

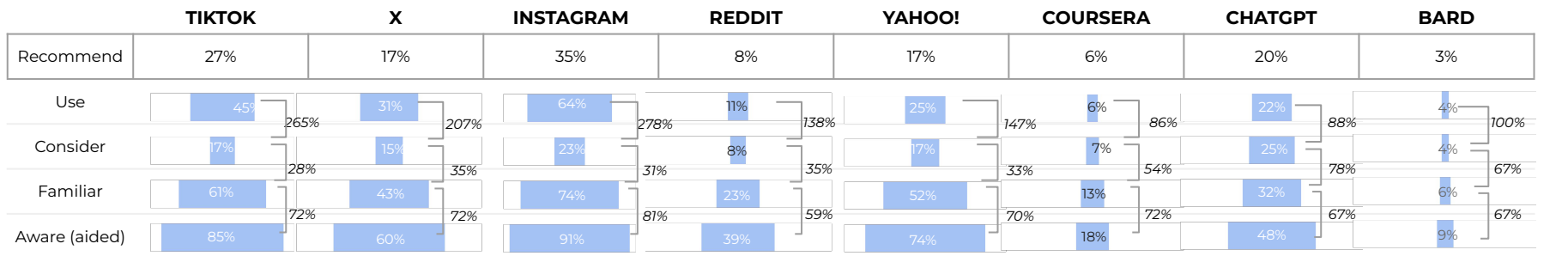
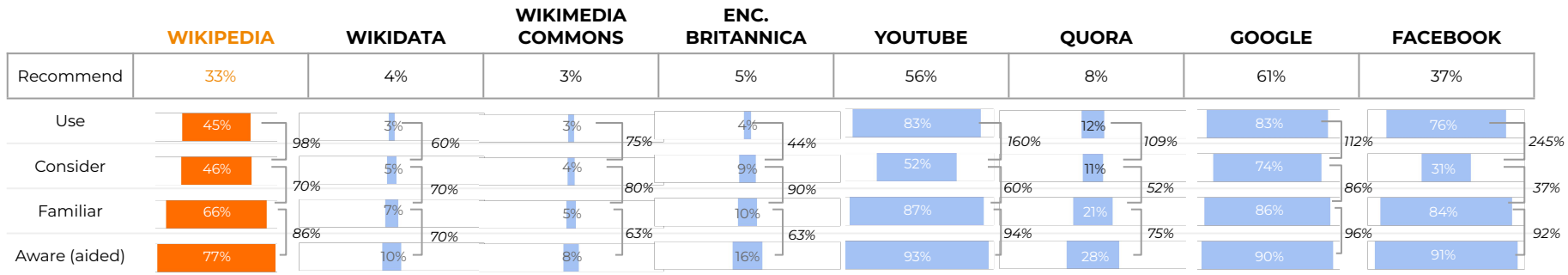
Persuasion

How well the brand converts people from awareness, to considering the brand, to using it and advocating for it

We capture the strength of how well the brand is 'persuading' people by looking at the metrics through a funnel

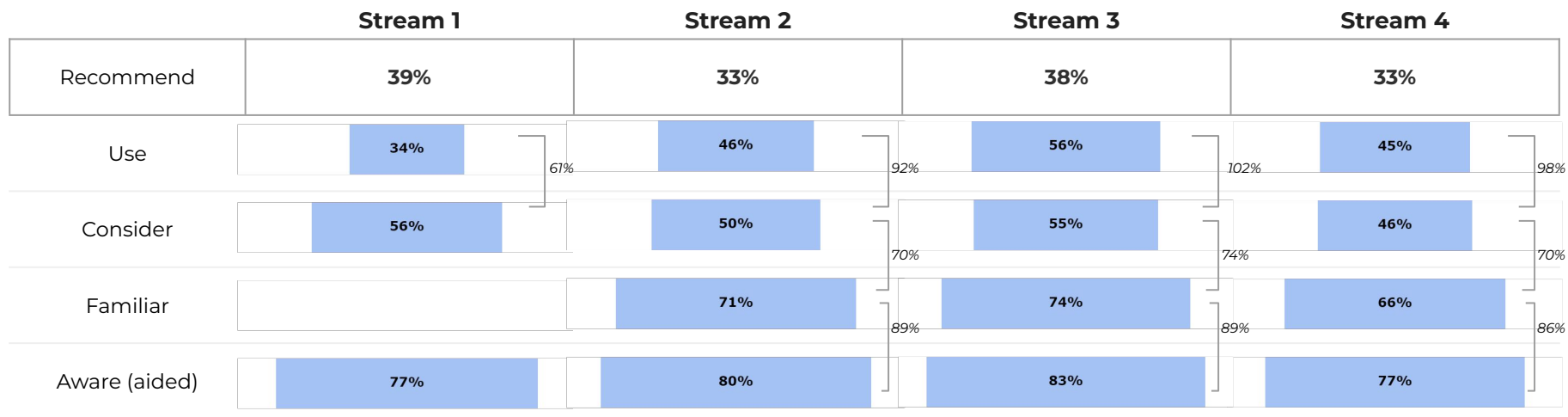


Wikipedia continues to have a healthy brand funnel vs. other platforms



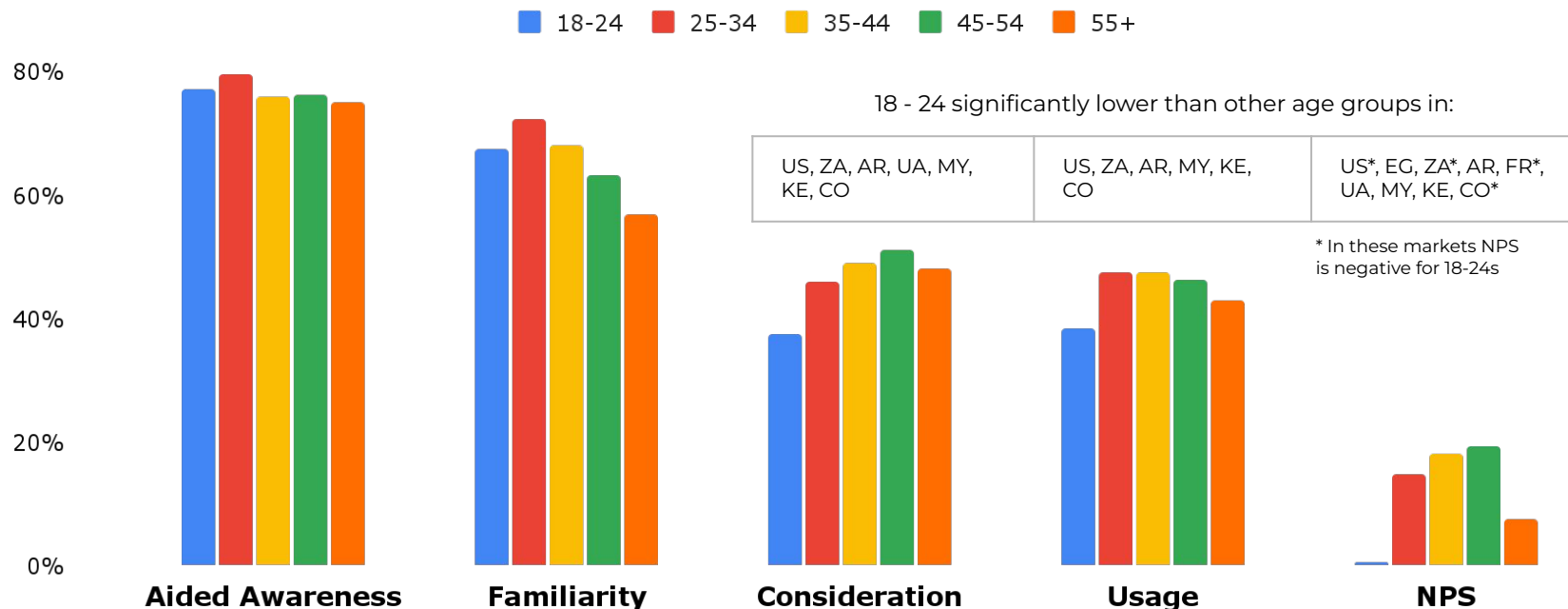
Base: All respondents, all 12 markets
 Note: Recommend is top 2 box likelihood to recommend on a 10 point scale

Wikipedia funnel is weaker than in Stream 2 and 3



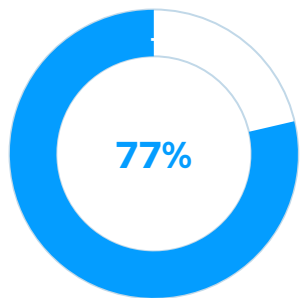
Wikipedia has less appeal for younger people, with particularly low NPS

Key Brand Metrics for WIKIPEDIA by age groups

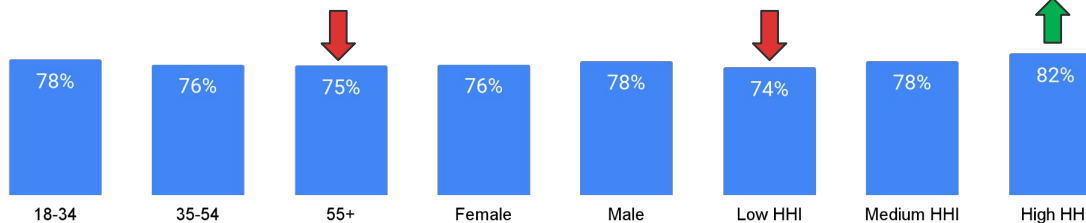


Wikipedia awareness high across all demographic groups

Aided brand awareness (%)



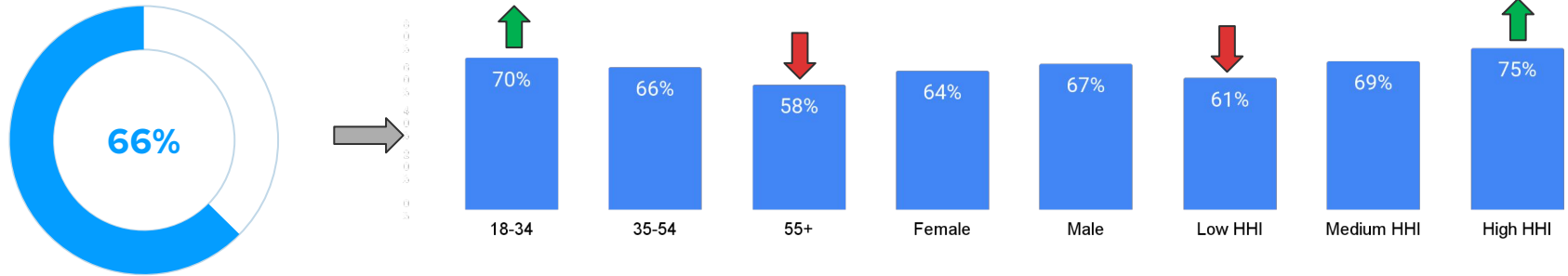
Aided brand awareness (%)



Familiarity of Wikipedia is even amongst demographics, particularly high for higher income respondents

Familiarity for Wikipedia

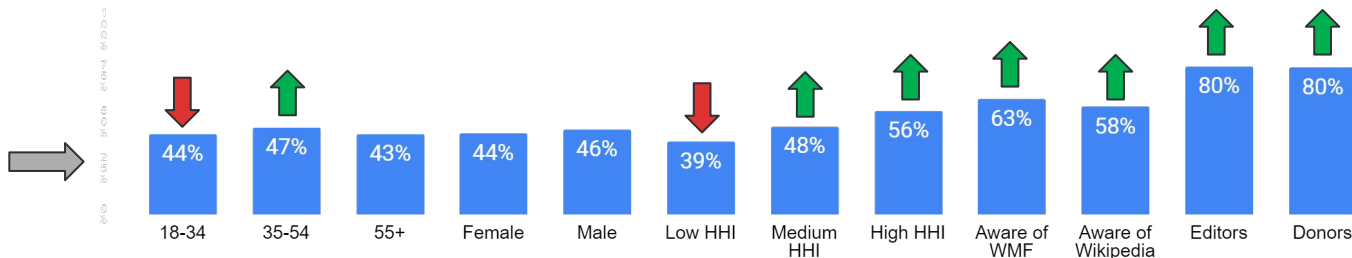
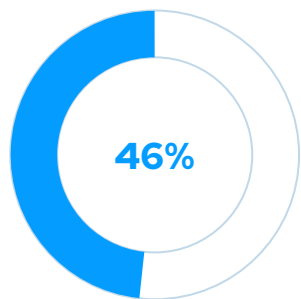
Top 2 box familiarity (%) for Wikipedia



Higher income people more likely to consider using Wikipedia

Consideration for Wikipedia

% stating they would consider using Wikipedia



Q8. Which of the following websites or apps would you CONSIDER USING for knowledge or information in the future?



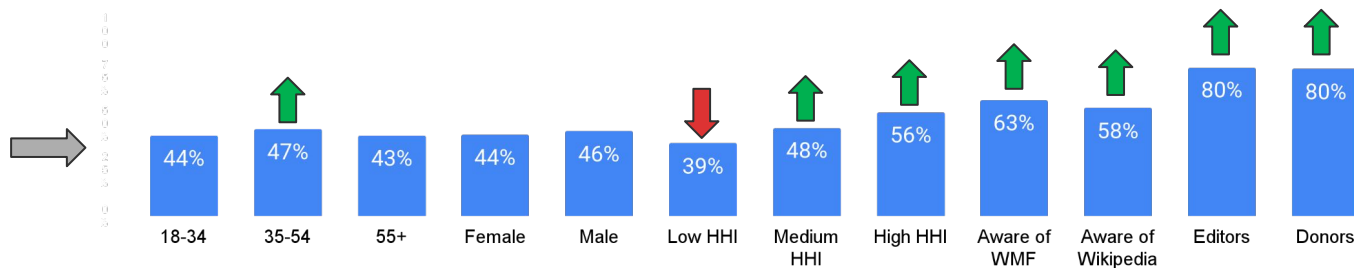
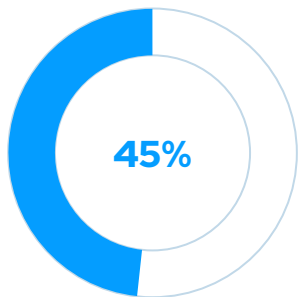
Indicates significant difference vs Total sample at a 95% confidence level

Base: All respondents

Wikipedia usage higher among higher income, and editors and donors

Wikipedia usage

% stating they use Wikipedia

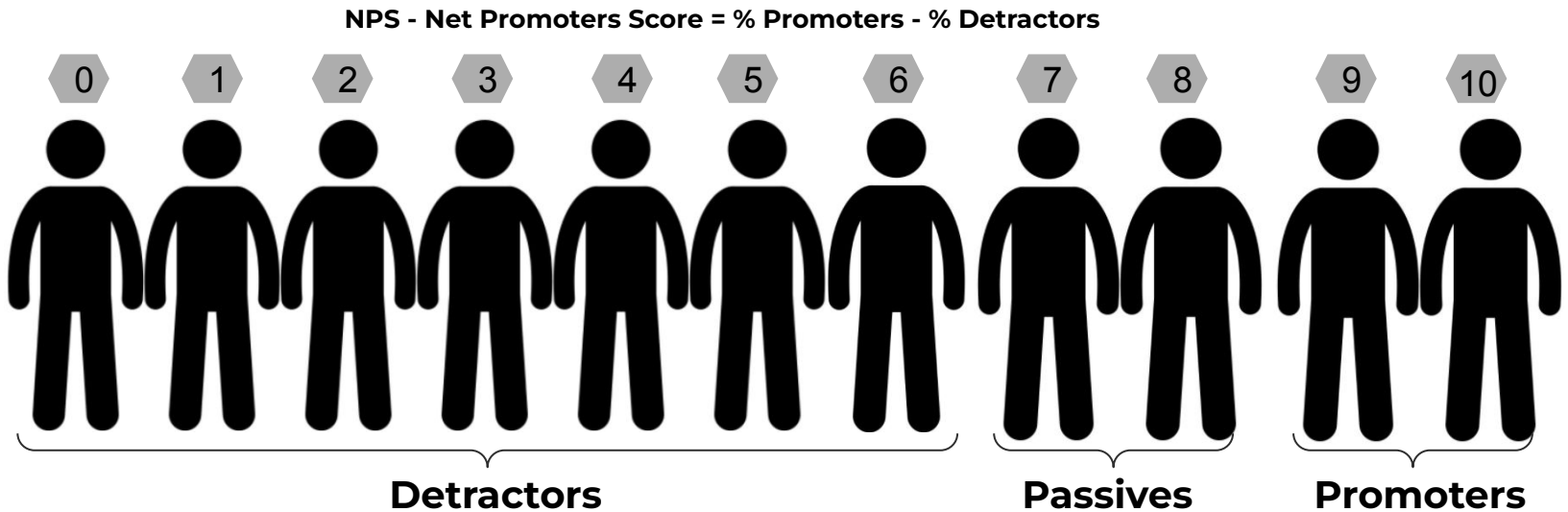


Base: All respondents
Q6: Which of these websites or apps do you USE?

↑↓ Indicates significant difference vs Total sample at a 95% confidence level

The Net Promoter Score, a widely-known metric used to measure the level of likely advocacy among users

Question asked: How LIKELY is it that you would RECOMMEND the following websites or apps to a friend or colleague on a scale of 0 to 10?

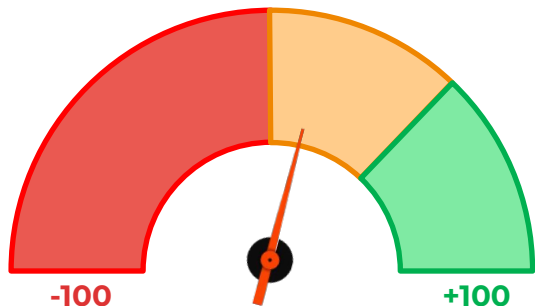


Base: Respondents aware of each brand.

Q: How LIKELY is it that you would RECOMMEND the following websites or apps to a friend or colleague?

Wikipedia has a good NPS, the 'Big Tech' firms stronger this Stream

Net Promoter Score (Calculated as the % of 'Promoters', those who would recommend brand, MINUS the % of 'Detractors', those who wouldn't recommend)



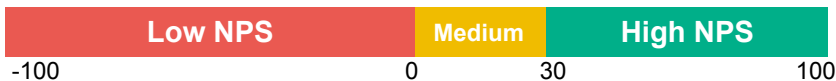
Wikipedia

+16

Promoters: 43%

Passives: 30%

Detractors: 27%



Arrows indicate direction of difference from Stream 3

Google +58 ↑ (68% / 22% / 10%)	YouTube +46 ↑ (59% / 26% / 13%)	Wikidata +12 ↓ (41% / 31% / 29%)
Facebook +10 ↑ (41% / 28% / 31%)	ChatGPT +9 (42% / 27% / 33%)	Bard +7 (39% / 28% / 32%)
Coursera +6 ↓ (37% / 31% / 31%)	Instagram +4 ↑ (39% / 27% / 35%)	Wikimedia Commons +3 ↓ (37% / 30% / 34%)
Enc. Britannica -3 ↓ (33% / 31% / 36%)	Quora -10 ↓ (30% / 29% / 40%)	TikTok -15 ↑ (32% / 20% / 47%)
X (formerly Twitter) -17 ↑ (29% / 26% / 46%)	Yahoo! -30 (23% / 25% / 53%)	Reddit -34 ↓ (20% / 26% / 54%)

NPS lower in this Stream, with less Promoters than previous Streams

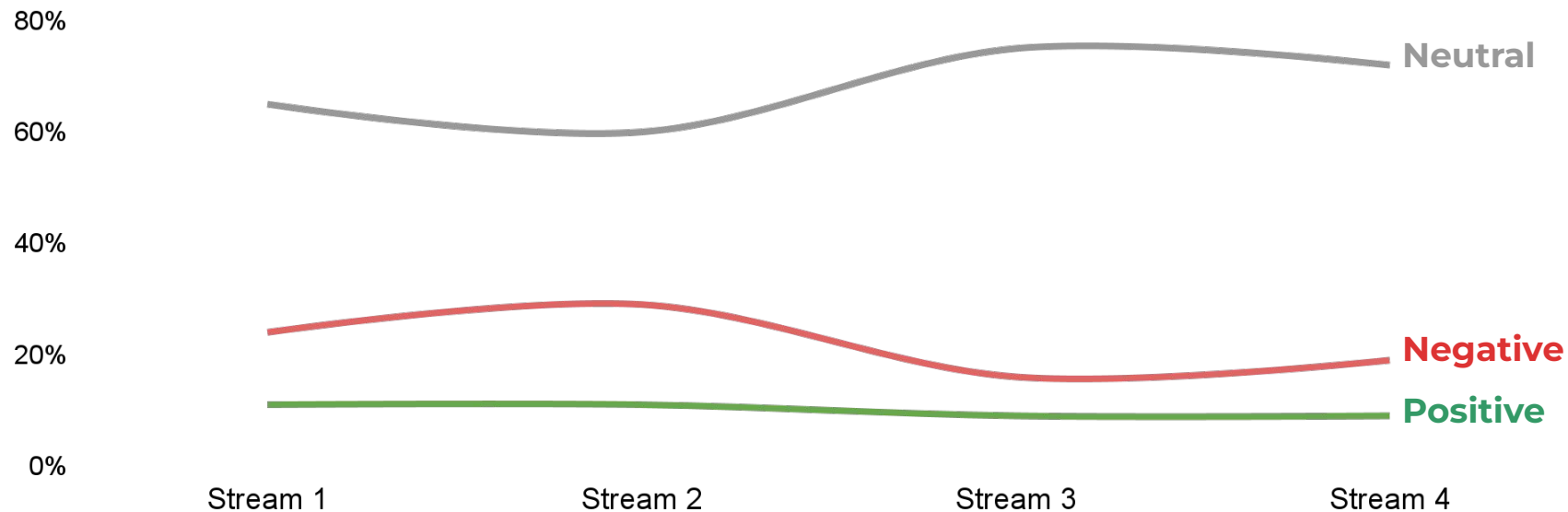
Net Promoter Score

The level of likely advocacy among users, reflecting the strength of the overall user experience.

	<i>Stream 1</i>	<i>Stream 2</i>	<i>Stream 3</i>	<i>Stream 4</i>
	+15	+22	+23	+16
Promoters	46%	47%	48%	43%
Passives	22%	28%	27%	30%
Detractors	32%	25%	25%	27%

Wikipedia social sentiment more negative than positive

Wikipedia Social Sentiment (From Social Listening Analysis)

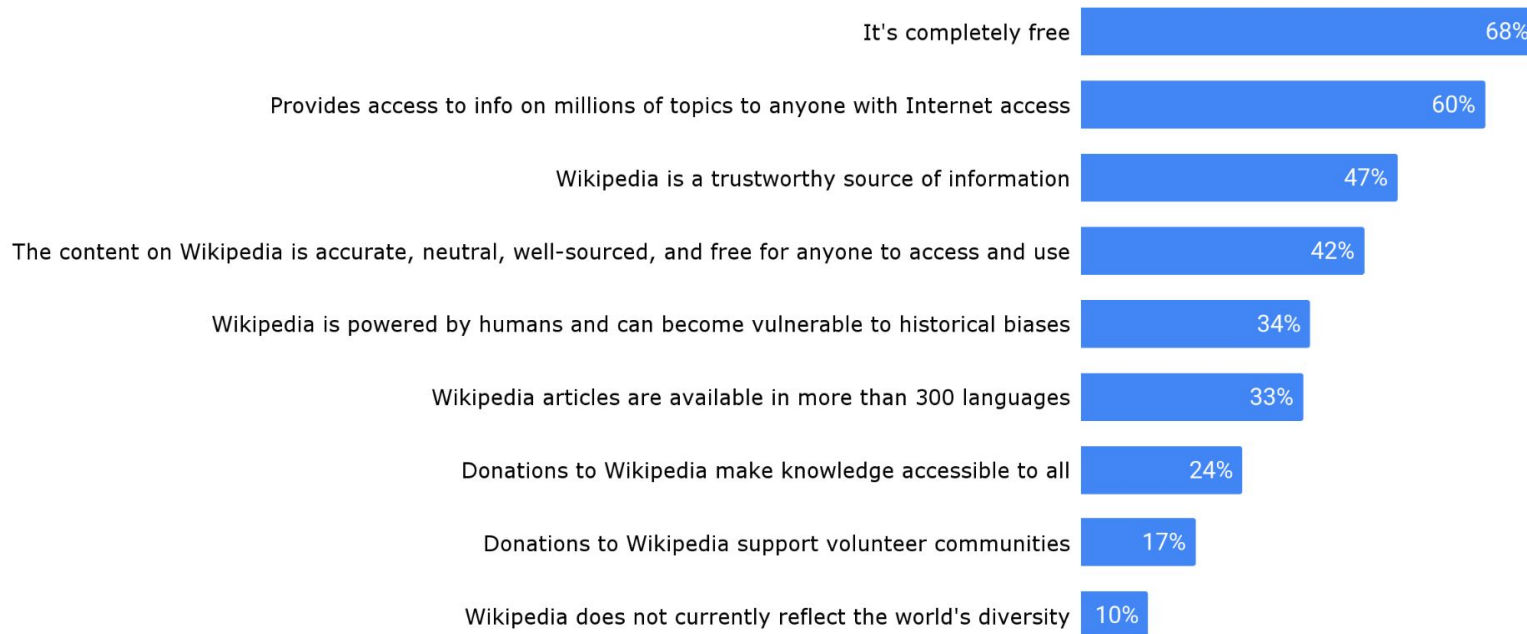


Proposition & Purpose

What people associate with the brand and its competitors

Being free, and depth of topics is what people know most about Wikipedia, very few understand the role of donations

% of respondents indicating what they know about Wikipedia to be true



Wikipedia is described as 'free', available but also 'bad' and 'fake'

Adjectives used to describe Wikipedia (top 10)



"A platform to share knowledge, the world, which is free, and users can modify information and have great credibility."

Man, 25-34, Egypt

"Often riddled with misinformation but has so much readily and neatly presented information"

Woman, 18-24, South Africa

In social media, Wikipedia mentions use 'new', 'first', 'good', 'american'

Top 10 Adjectives

Stream 1



Stream 2



Stream 3



Stream 4



Top 5 Word Pairs

united states
wikipedia pages
social media
well known
google wikipedia

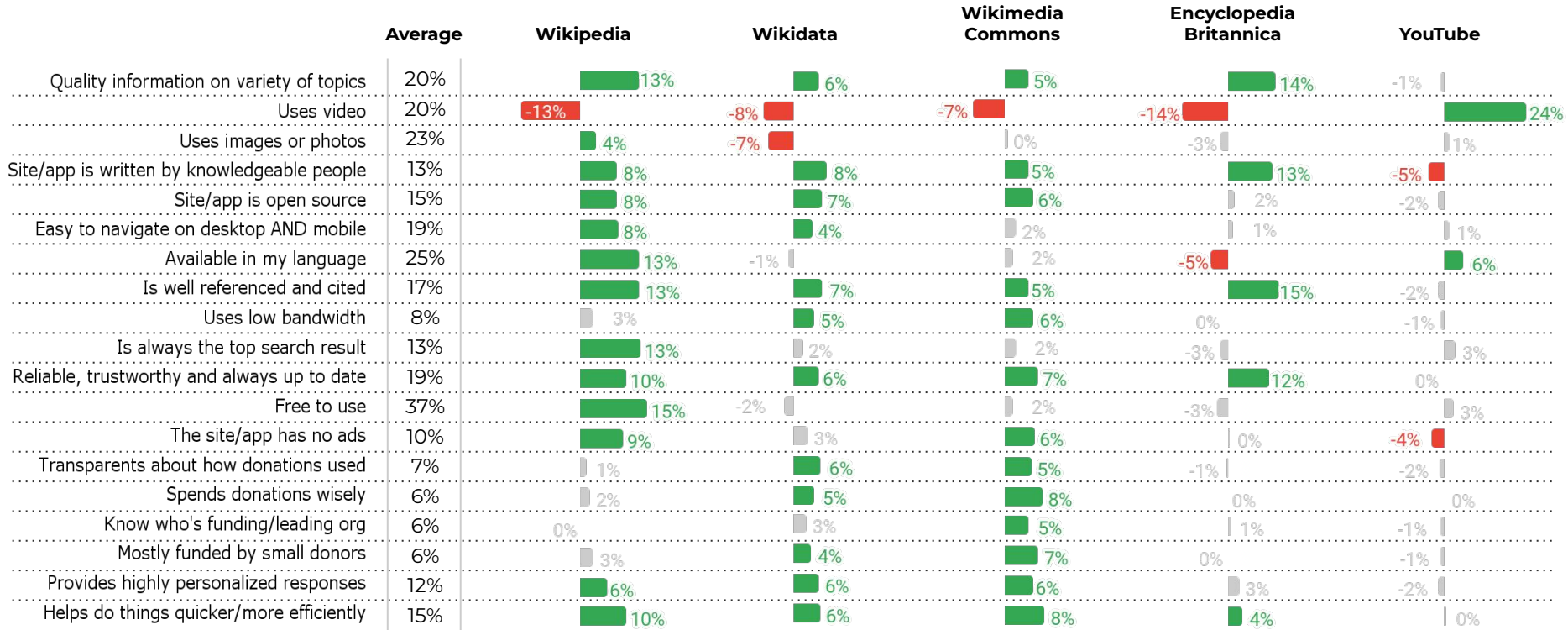
net worth
united states
social media
exam help
new york

udemy courses
social media
united states
google wikipedia
stock news

well known
facts canada
united states
tiktok star
climate change

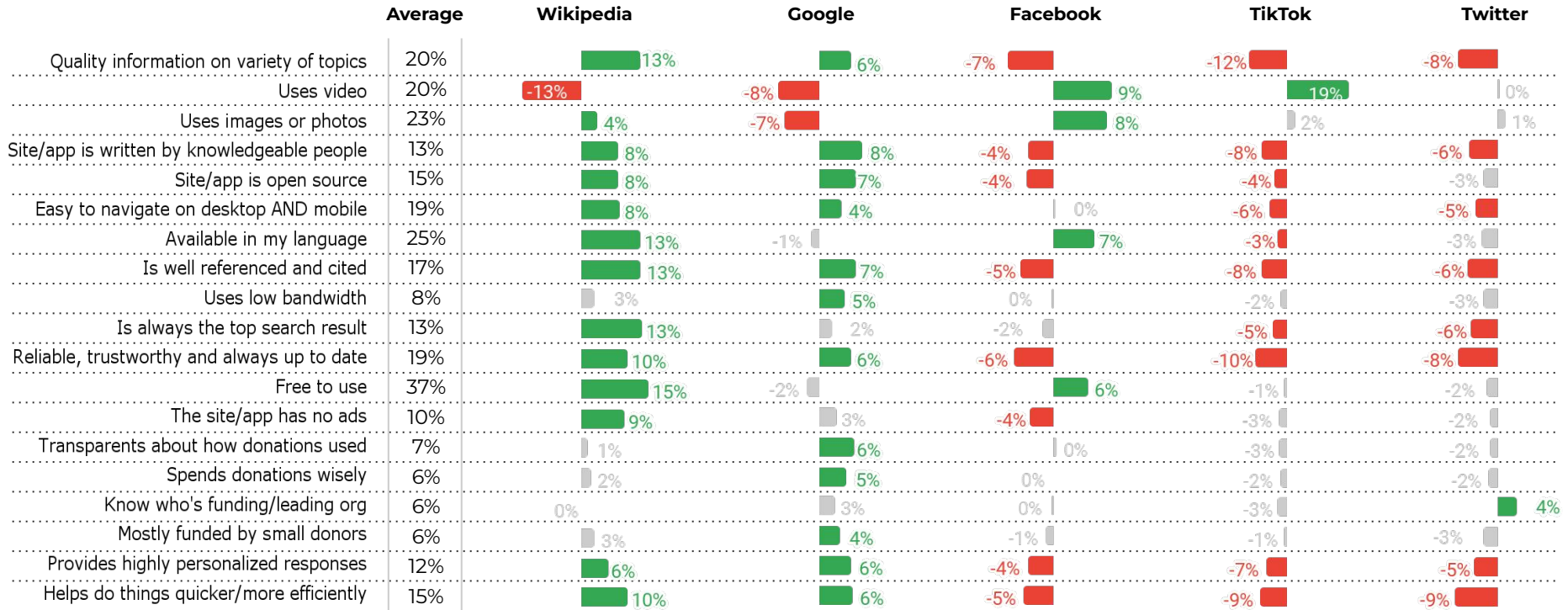
Wikipedia continues to be seen very positively vs. other platforms

Bars are percentage point difference from average across all brands (includes brands not shown here), among aware of each brand



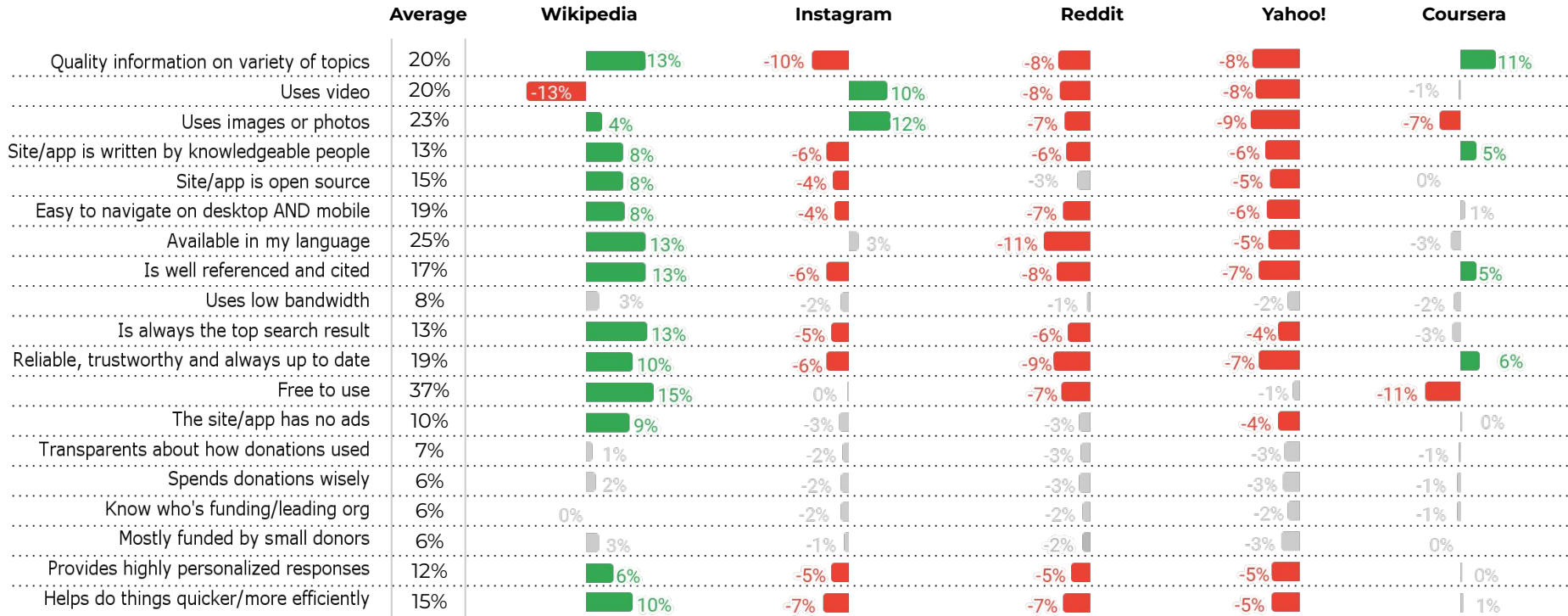
Google performs strongly on the attributes, TikTok and Twitter less so

Bars are percentage point difference from average across all brands (includes brands not shown here), among aware of each brand



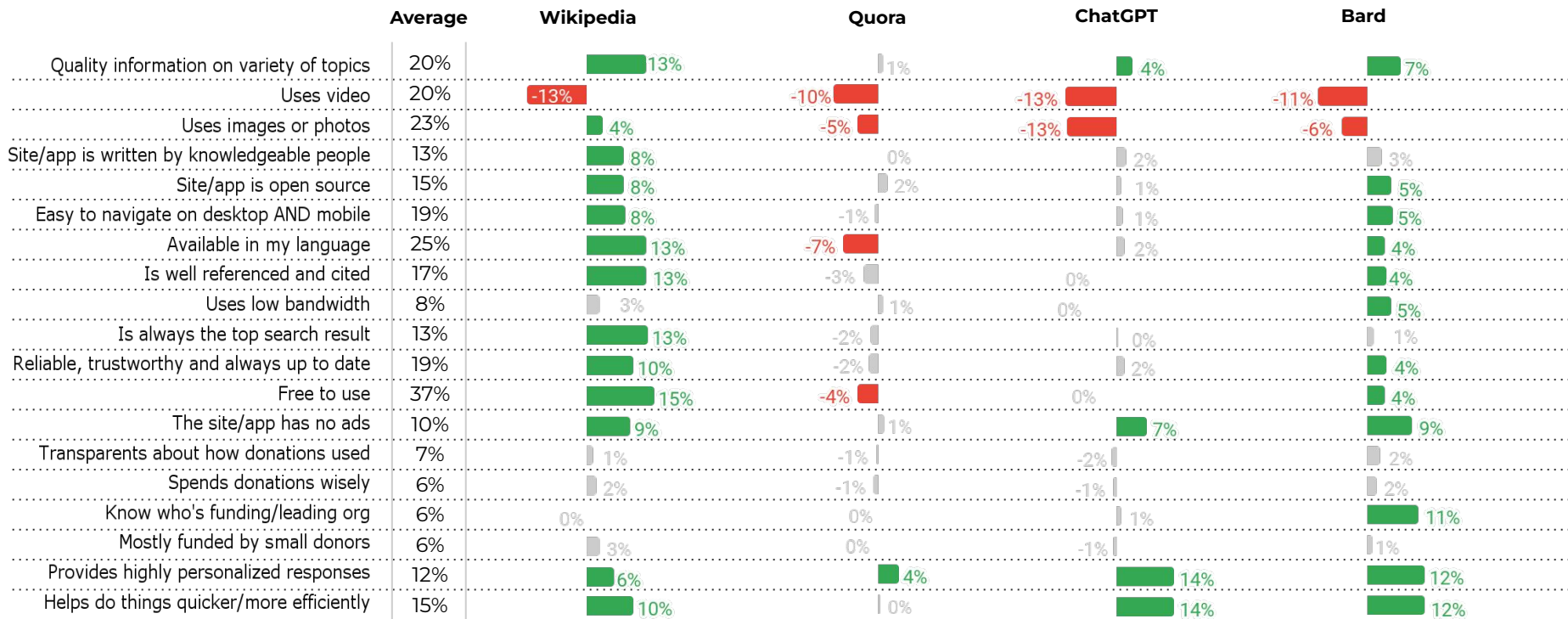
Reddit and Yahoo! also perform poorly, Coursera seen as quality

Bars are percentage point difference from average across all brands (includes brands not shown here), among aware of each brand



People neutral about ChatGPT, Bard stronger, both do well on personalized responses and helping do things more efficiently

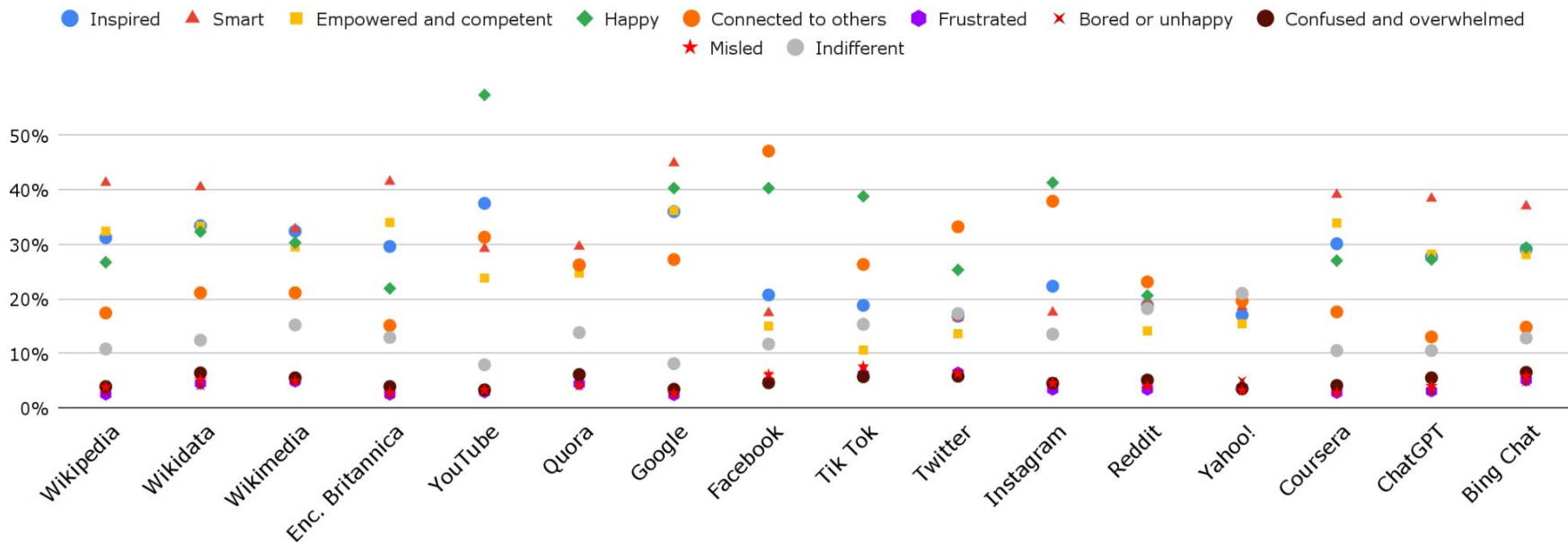
Bars are percentage point difference from average across all brands (includes brands not shown here), among aware of each brand



Wikipedia users most likely to feel smart, inspired and empowered/competent when using the platform

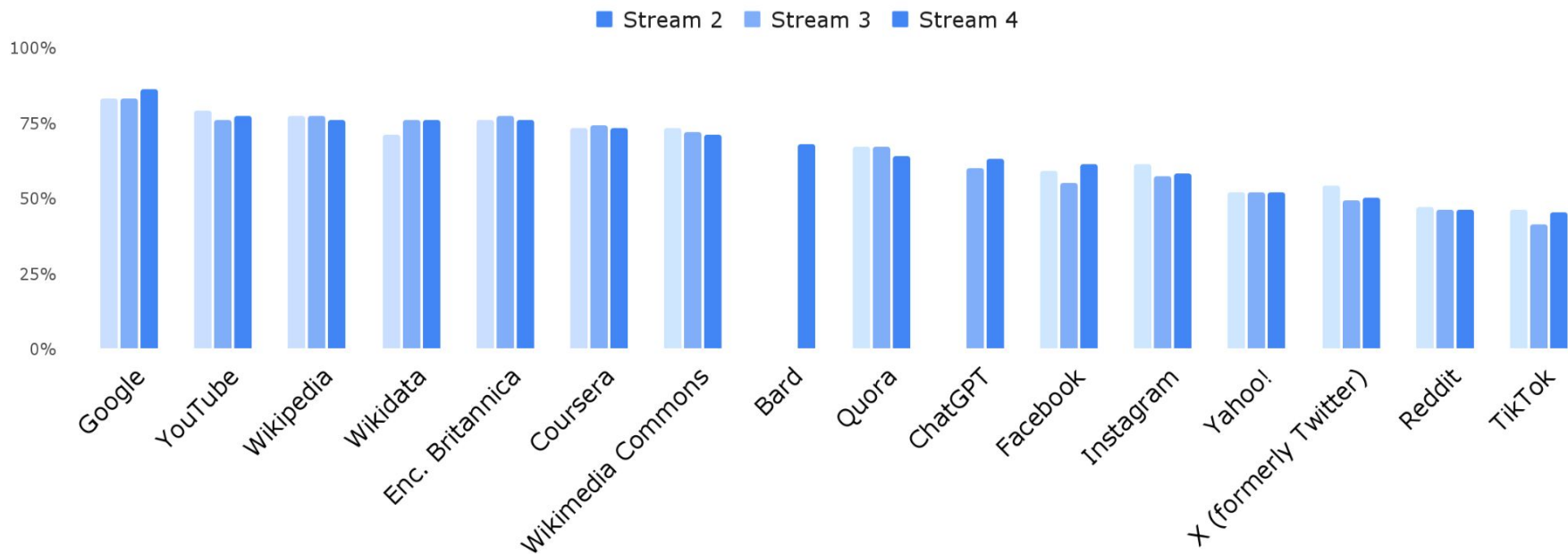
Emotional feelings with brands

Varied emotional feelings with Wikipedia and other competing brands



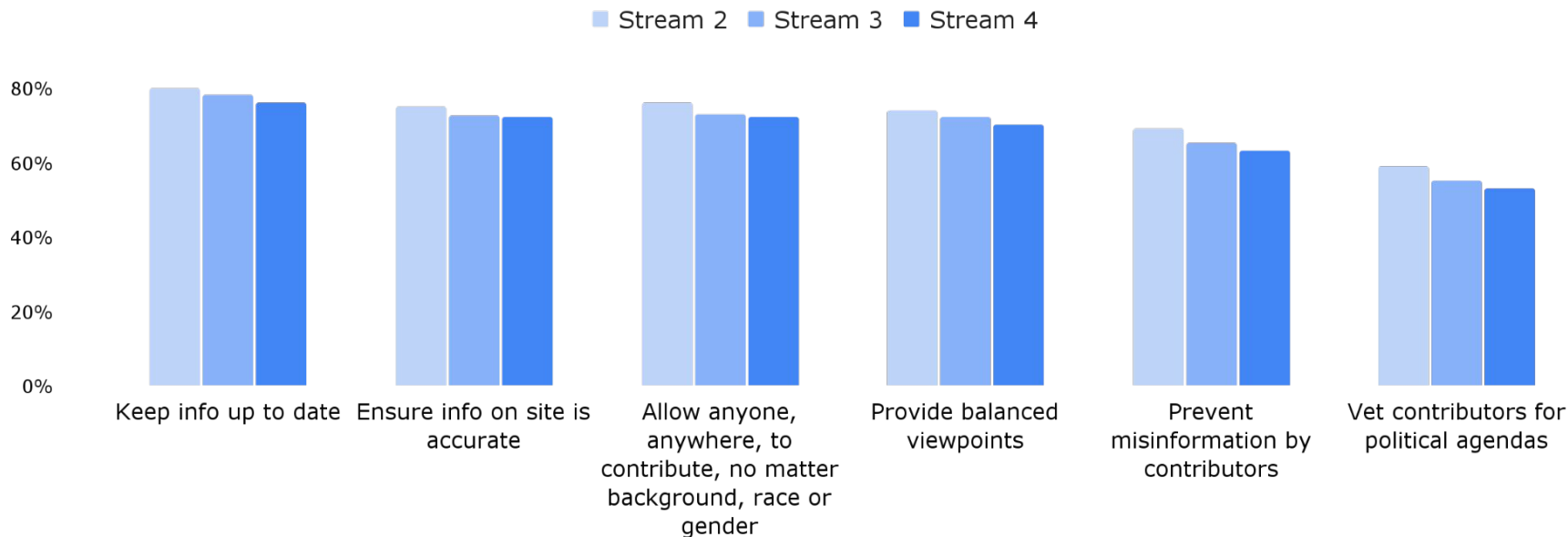
Trust stable across Streams for most platforms

% of respondents indicating how much they trust each website/app to be honest and unbiased (top 2 box)



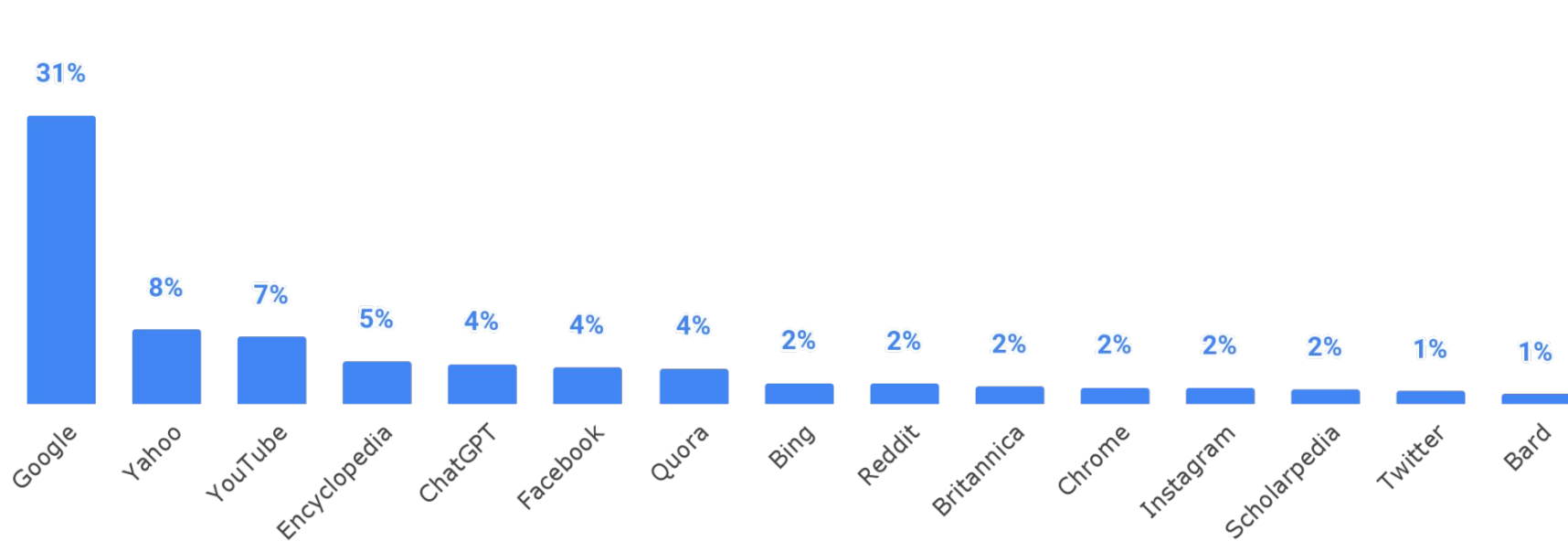
Trust in Wikipedia to provide balance, prevent misinformation, & vet for political agendas lower over Streams

% of respondents indicating how much they trust Wikipedia to... (top 2 box)



Google most likely platform people would use if Wikipedia didn't exist

% saying which other platform would use if Wikipedia didn't exist (from Open Ended question)

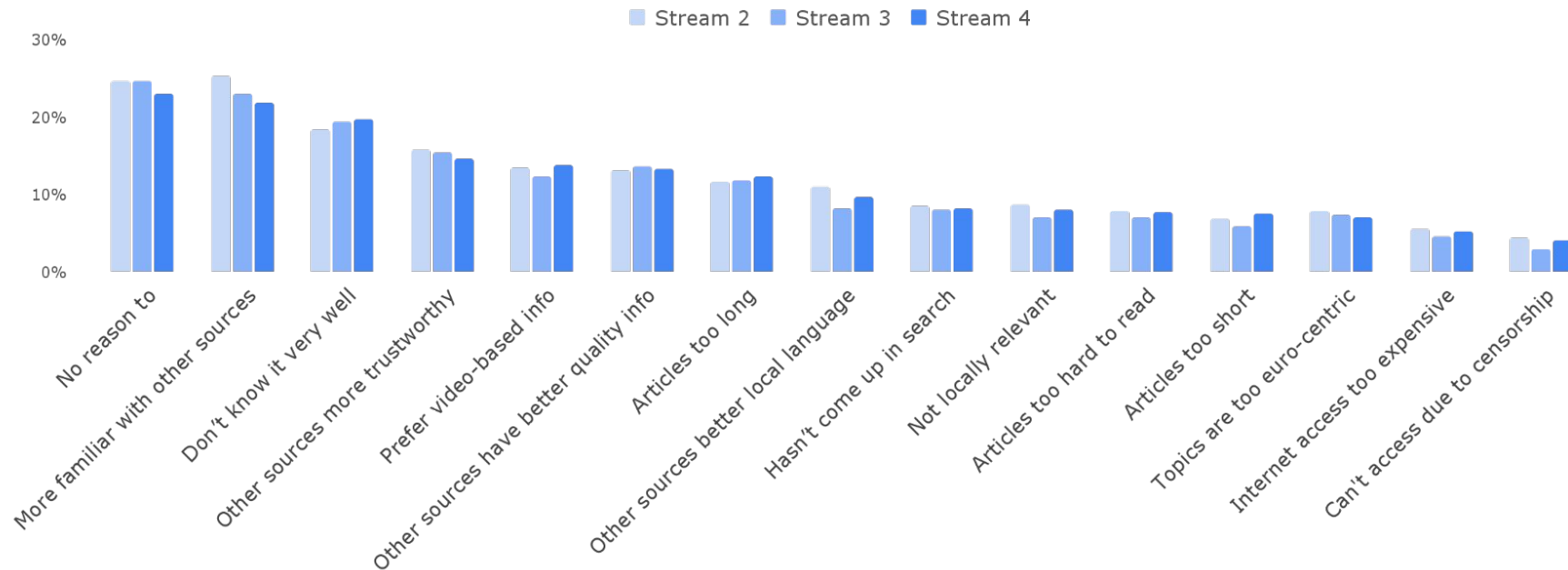


Usage: Deeper Dive

Deeper dive into how people are using
Wikipedia

Not having reason & low familiarity biggest usage barriers

% stating why they don't use Wikipedia



Main difference in barriers is among 55+ who are less likely to have reason to use Wikipedia, and don't know it as well

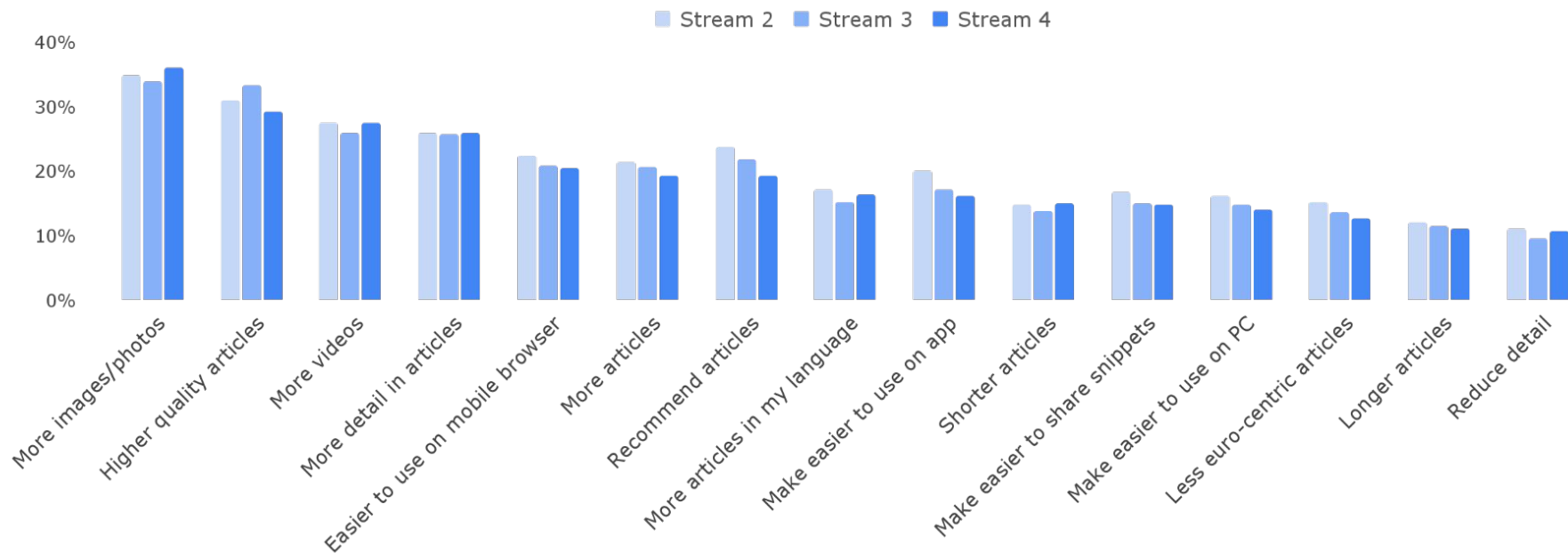
Barriers to using Wikipedia

% of respondents selecting why they do not use Wikipedia

	Total	18-34	35-54	55+	Male	Female	Low income	Medium income	High income	Aware of WMF	Aware of Wikipedia
I don't have a reason to	23%	20%	22%	29%	23%	23%	23%	23%	25%	20%	25%
I'm more familiar with other sources	22%	24%	21%	19%	21%	22%	20%	25%	23%	25%	24%
I don't know it very well	20%	15%	20%	28%	19%	20%	22%	17%	17%	18%	16%
Other sources are more trustworthy	15%	18%	13%	12%	15%	15%	13%	18%	15%	15%	16%
I prefer video based information	14%	17%	13%	9%	16%	12%	12%	16%	16%	19%	15%
Other sources have better quality information	13%	15%	12%	11%	13%	14%	12%	16%	14%	16%	15%
Wikipedia articles are too long	12%	13%	12%	10%	12%	12%	11%	15%	15%	17%	11%
Other sources have better information in my language	10%	10%	11%	6%	10%	10%	9%	11%	13%	13%	9%
It hasn't come up in online search results	8%	8%	9%	7%	8%	8%	8%	10%	8%	11%	8%
Not locally relevant	8%	8%	9%	6%	8%	8%	7%	10%	8%	13%	7%
Wikipedia articles are too hard to read	8%	7%	9%	6%	7%	8%	6%	9%	11%	11%	6%
Wikipedia articles are too short	7%	9%	7%	5%	8%	7%	7%	8%	10%	13%	6%
Topics on Wikipedia are too euro	7%	8%	7%	5%	8%	6%	6%	9%	9%	11%	6%
I don't access it because my internet/data access is too expensive	5%	5%	6%	4%	6%	5%	5%	6%	6%	8%	4%
I can't access it due to censorship in my country	4%	5%	5%	1%	4%	4%	4%	5%	5%	7%	2%

Adding more images remains improvement users want most

% stating how they would improve Wikipedia



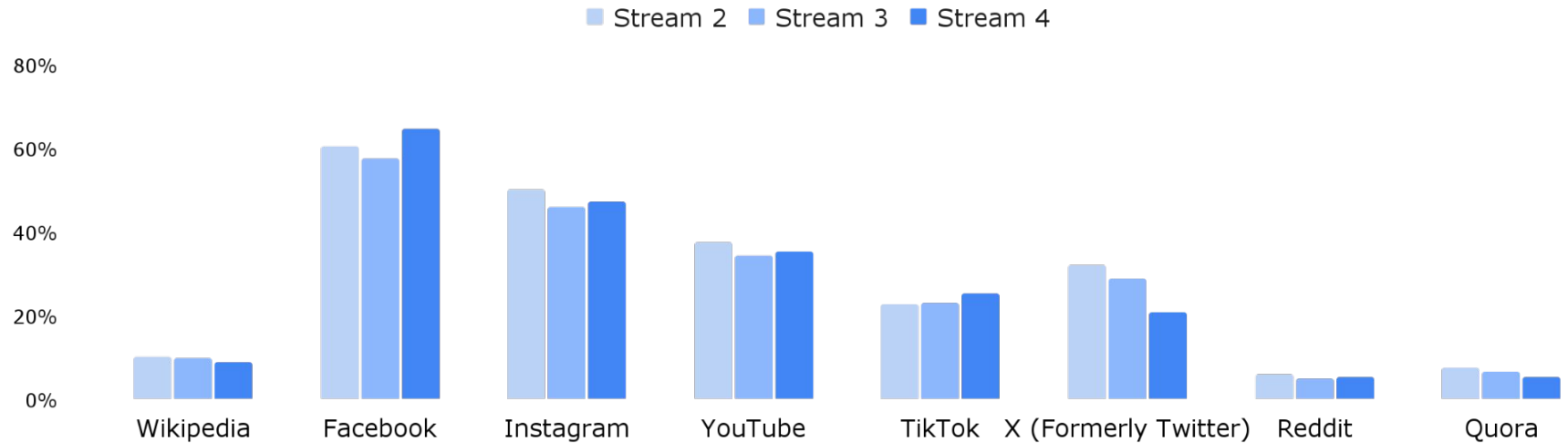


Editing

People's interest in editing

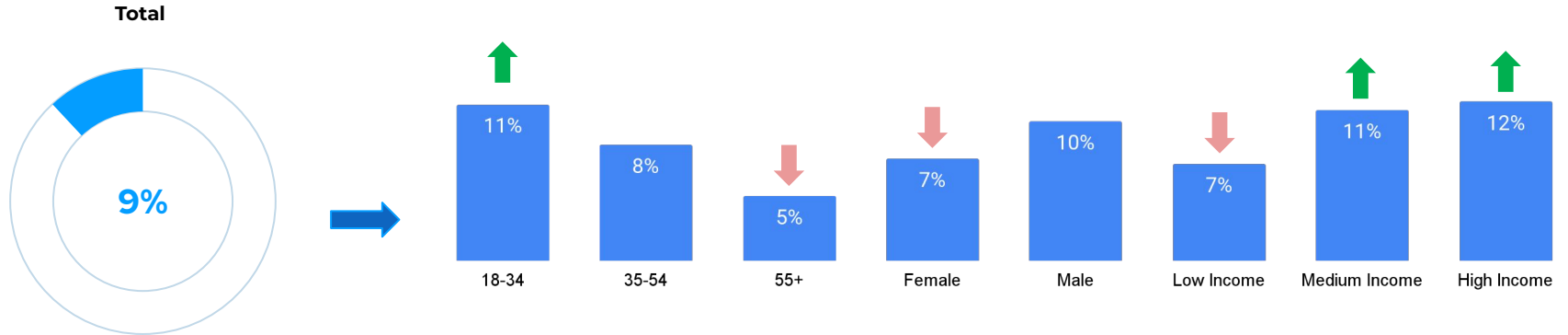
Ever Edited: Wikipedia has few contributors, Facebook more in this Stream, X (formerly Twitter) less

% who have ever ever written on, edited, posted, or published



Ever Edited: Wikipedia editing higher among high income, younger people

% who have ever ever written on, edited, posted, or published ON WIKIPEDIA



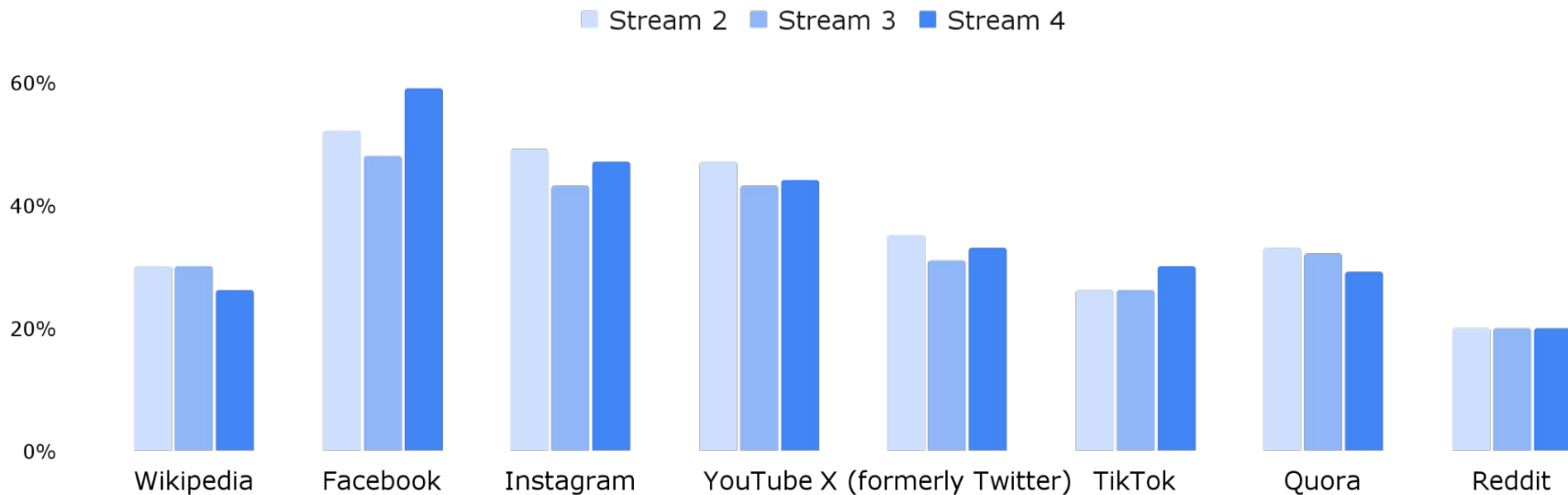
Base: All respondents
Q11: Which of the following projects have you ever written on, edited, posted, or published anything?



Indicates significant difference vs total sample at a 95% confidence level

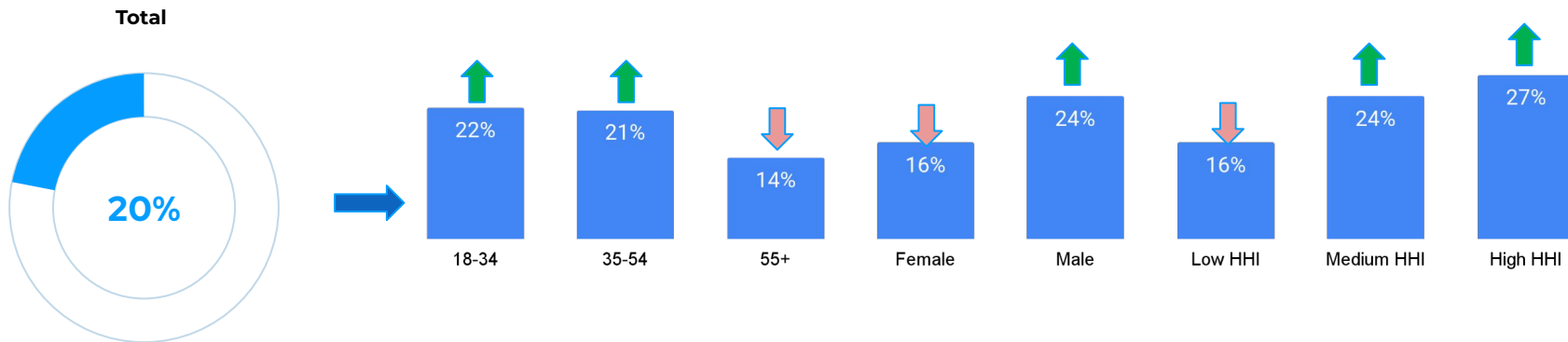
Consider Editing: Opportunity to grow Wikipedia's editor base

% who would ever consider writing, editing, posting, or publishing on



Consider Editing: Editing consideration stronger for higher income groups for men and under 55s

% who would ever consider writing, editing, posting, or publishing on



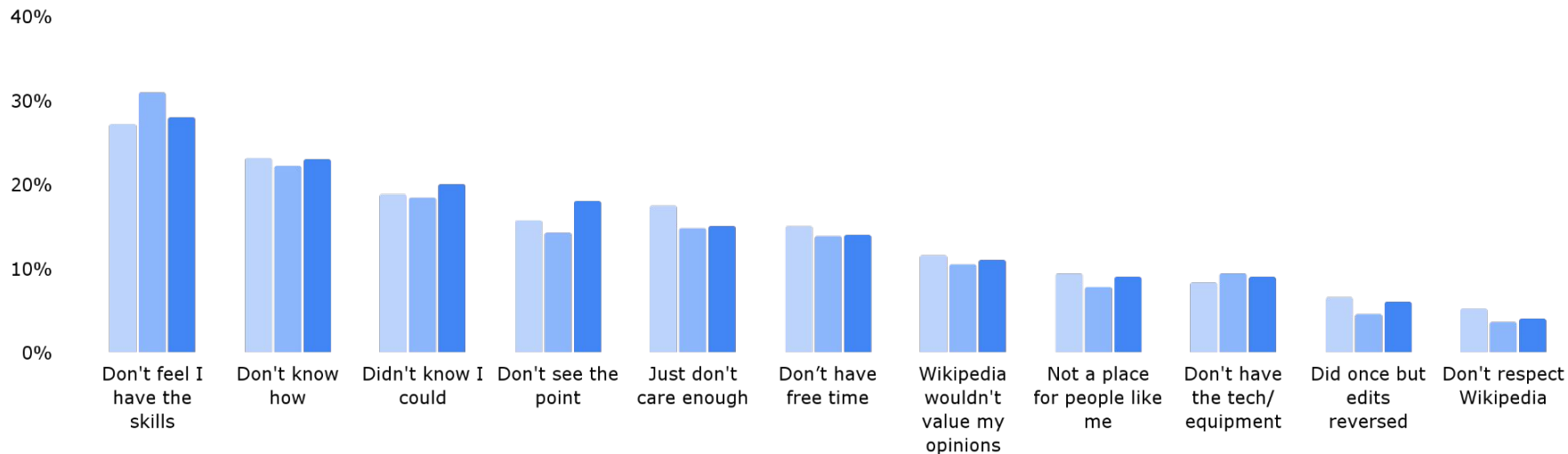
Base: All respondents
Q12. Which of the following would you CONSIDER writing on, editing, posting, or publishing anything in the future?



↑↓ Indicates significant difference vs Total sample at a 95% confidence level

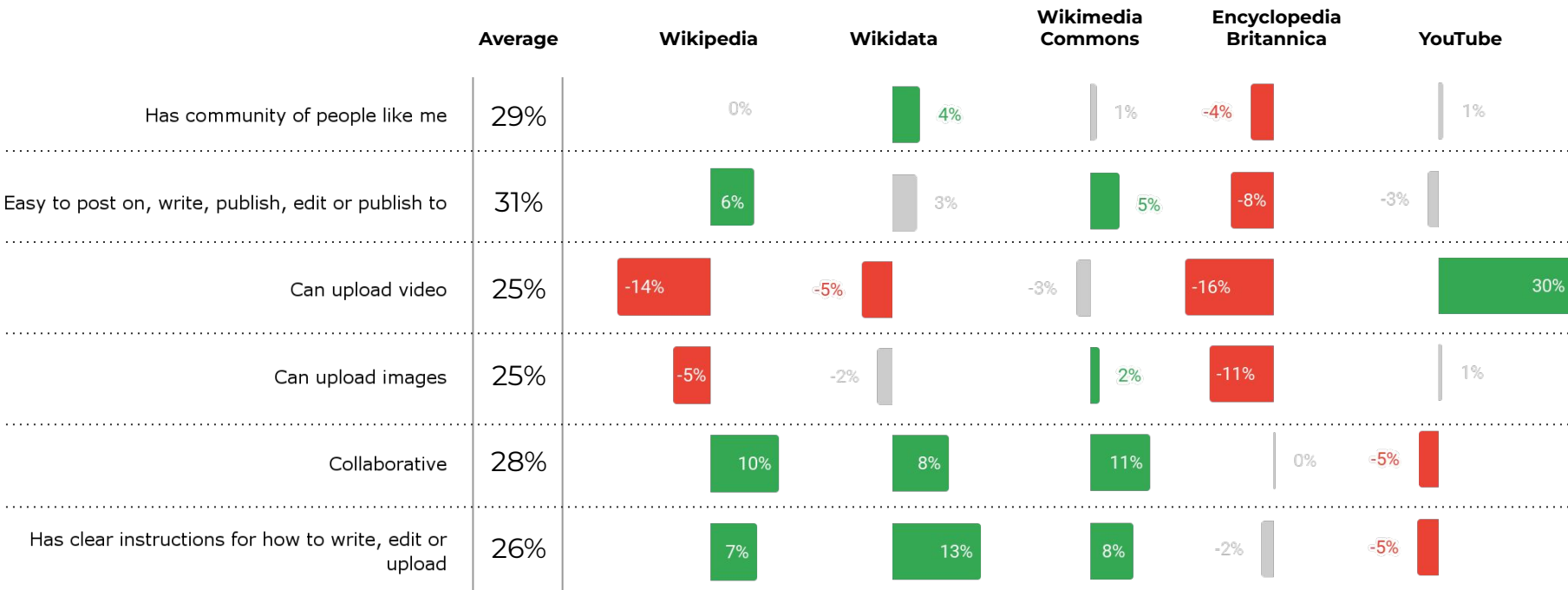
Lack of confidence & knowledge biggest editing barriers

% stating as a barrier to editing



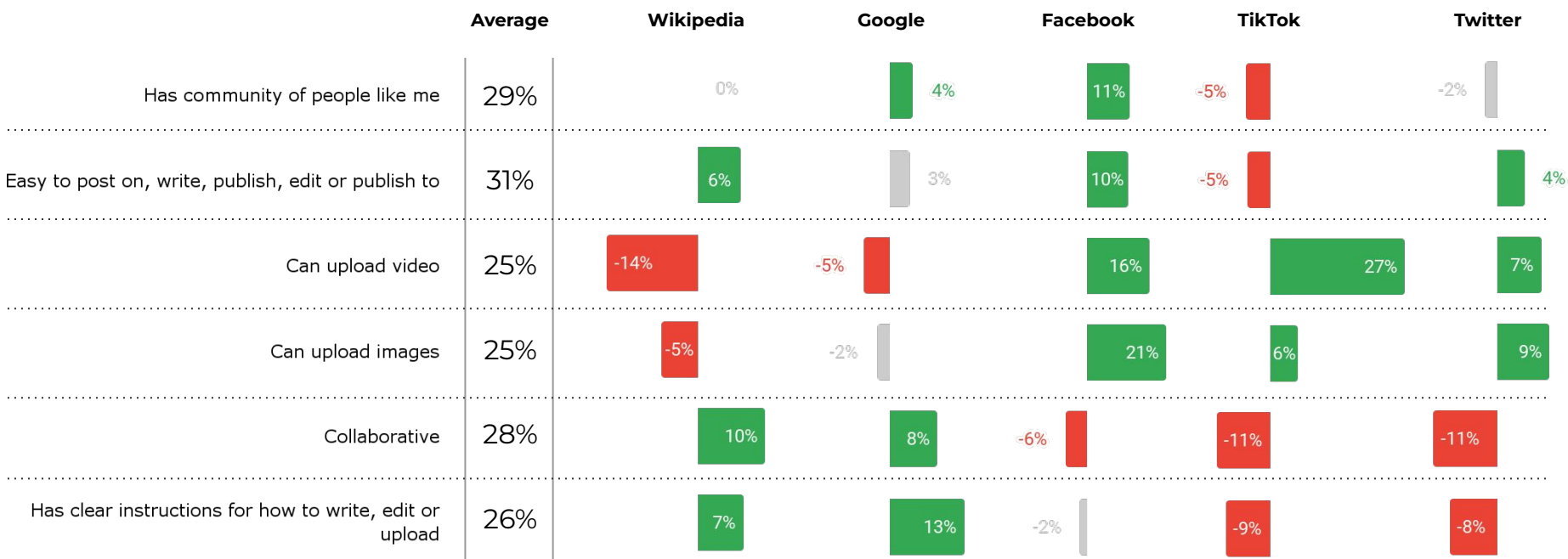
Wikipedia strong on being perceived as collaborative

Bars are percentage point difference from average across all brands (includes brands not shown here), among aware of each brand



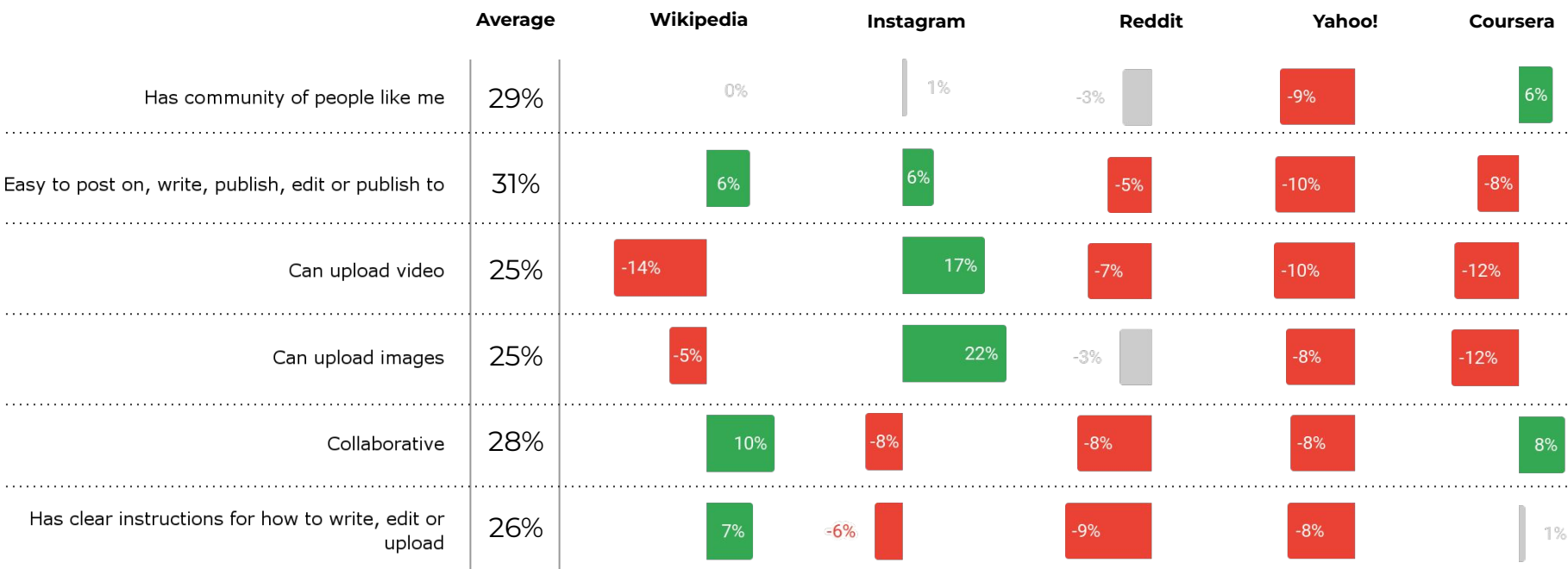
Facebook has community, and easy to post to

Bars are percentage point difference from average across all brands (includes brands not shown here), among aware of each brand



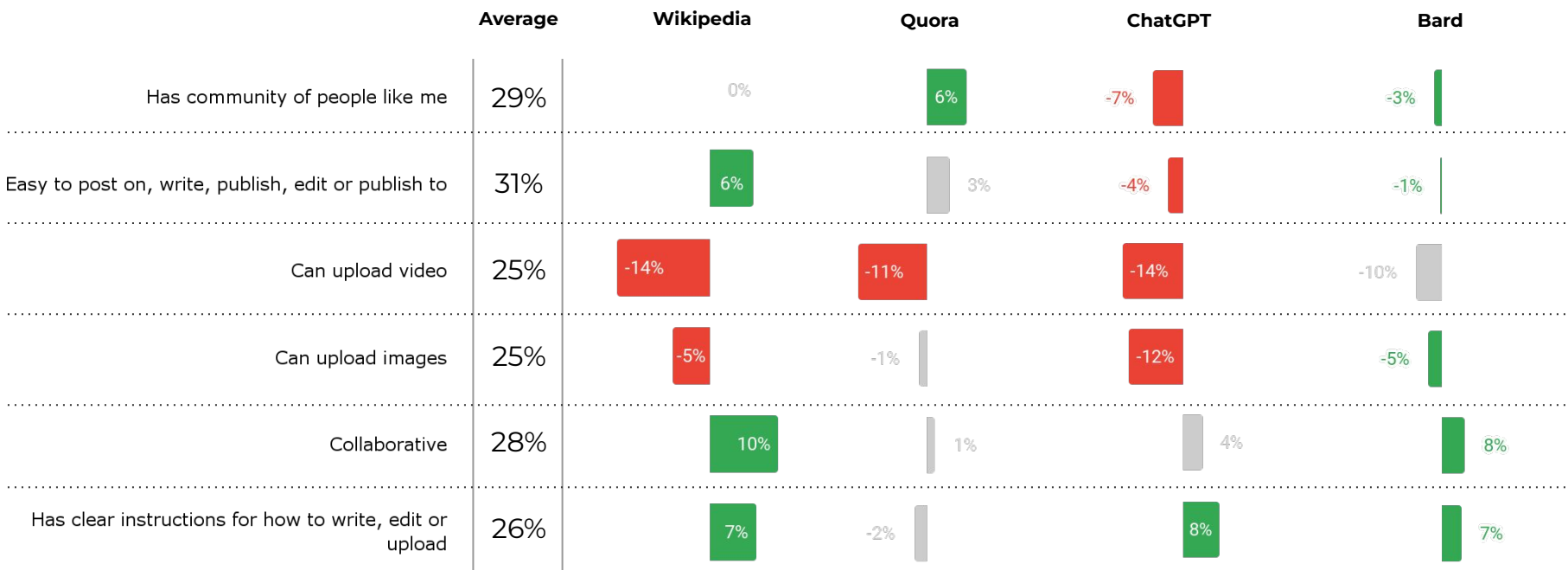
Coursera has a sense of community and collaboration

Bars are percentage point difference from average across all brands (includes brands not shown here), among aware of each brand



Quora has more of a community feel, though not much else

Bars are percentage point difference from average across all brands (includes brands not shown here), among aware of each brand





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