This framework sets the guiding goals, objectives, lines of inquiry, and methods for the New Editor Experiences research, and will frame the development of research protocols and question guides.

I. Project Context
   - Background
   - Project Goal

II. Research Objectives

III. Key Research Questions
   - Theme 1: Characteristics, Behaviors, and Motivations
   - Theme 2: Tech Ecosystems
   - Theme 3: Engagement with Wikipedia
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IX. Research Instruments
I. Project Context

Background
The Wikimedia Foundation (WMF) seeks to better understand the audiences that engage with Wikimedia projects, so that it can better serve these diverse audiences.

To support this goal, the WMF developed the Audience Research Project to integrate a deeper understanding of its audiences into its product and programmatic work. As part of this process, the WMF will be conducting generative design research to address knowledge gaps about key audiences—that is, where research about these audiences is not available, too dated, or otherwise insufficient for informing product and program development. This research will directly inform the Product teams’ work in the coming fiscal year.

Given the diverse audiences the WMF serves, it was necessary to determine an initial set of audiences to focus on in generative research. To do this, the Foundation undertook a prioritization exercise which considered factors including the volume and type of research existing about each audience, and different WMF teams’ ability to integrate generative research into their near-term work. Based on this, Wikipedia editors surfaced as the priority audience for research because:

- **Research on editors can provide value to a range of WMF teams.** Editors overlap with all product teams and other WMF teams (e.g., community engagement, fundraising), and so findings on their needs, motivations, behaviors, and constraints to engagement with the WMF can serve multiple purposes.
- **The WMF lacks design research on editors.** Past generative research has focused on readers, and while WMF receives feedback from a subset of editors, this input is not representative of the wider community of contributors.
- **Findings may be able to inform movement strategy.** Given editors’ prominence in the Wikimedia movement, findings may be valuable for the larger movement strategy process currently underway.

Project Goal
WMF seeks to improve the quantity and diversity of contributors to Wikipedia. In doing so, the WMF seeks to help Wikipedia content become more complete and balanced.

As part of this effort, this project aims to develop a deeper understanding of non-English contributor communities that the WMF knows less about—specifically, new editors from mid-sized wikis. This research will surface needs and opportunities to support contributor growth and retention in these communities, which will inform the development of Editing’s product strategy for the 2017-2018 fiscal year.
II. Research Objectives

In South Korea and the Czech Republic, this research seeks to understand:

- **New editors’ motivations and behaviors**, such as their:
  - Motivations and incentives for contribution, particularly online;
  - Enablers of and barriers to contribution;
  - Habits for contributing online, and for interacting with Wikipedia.
- How **engagement with Wikipedia** (and/or the WMF, the movement) impacts contribution in individual instances and over time.
- How **Wikipedia’s product functionalities and community** support or inhibit online contribution.

III. Key Research Questions

**Theme 1: Characteristics, Behaviors, and Motivations**

1. **How do people determine how to spend their discretionary time?**
   - a. What are common ways they spend time? Why?
   - b. What prompts them to spend more or less time with a community?

2. **Why do people engage in voluntary activities to shape their world?**
   - a. How do they view and practice volunteerism, civic engagement, and knowledge sharing activities, both online and offline?
   - b. How do they engage with other actors in their communities, online or offline? Why?
   - c. What is their perceived value or reward of contributing?
   - d. What are their frustrations with contributing?

**Theme 2: Tech Ecosystems**

3. **How do people connect to the internet (though what devices, channels, etc.)?**
   - a. What devices do they use, and why? How frequently?
     - i. What activities do they do on which devices, and how? Why do they have these preferences?

4. **How do they use the internet?**
   - a. Where and when do they access the internet?
   - b. What languages do they use the internet in? Does this differ by activity?
   - c. How have their online behaviors changed over time?

**Theme 3: Engagement with Wikipedia**

5. **What is the perception of Wikipedia?**
   - a. How do they perceive the Wikimedia movement or brand?
   - b. What do they perceive and understand about Wikipedia?
     - i. What do they understand about how Wikipedia operates?
     - ii. What do they believe Wikipedia is valuable / suited for? What is it not suited for?
     - iii. What questions do they have about Wikipedia?
c. What do they perceive and understand about Czech/Korean Wikipedia specifically?
   i. What do they believe Czech/Korean Wikipedia is valuable/ suited for? What is it not suited for?
   ii. How does their perception of Czech/Korean Wikipedia compare to that of other language Wikipedias?

6. How does an editor’s engagement with Czech/Korean Wikipedia evolve over time?
   a. What was their first experience with Czech/Korean Wikipedia?
      i. How did they first learn about the Czech/Korean Wikipedia?
      ii. What prompted them to first use Czech/Korean Wikipedia?
      iii. What prompted them to first edit Wikipedia? What was that experience like?
   b. How frequently and to what extent do they interact with Wikipedia? And with the Wikimedia Foundation?
   c. How have they participated in programs or initiatives with the local Wikipedia community or its affiliates? What was their experience?
   d. What experiences have encouraged or discouraged their interaction with Wikipedia?
   e. How has their perception of Wikipedia changed since they started editing?

Theme 4: Use of Wikipedia

7. How do people contribute to (or edit) Wikipedia?
   a. How frequently, to what extent, and where do they contribute to Wikipedia?
      i. How do they decide what to do and what content to add?
      ii. Do they translate content from other wikis into Czech/Korean?
      iii. Do they contribute to other Wikipedias, besides Czech/Korean? If so, where, how, and how frequently?
   b. What types of sources do they use when editing?
      i. How do they select sources?
   c. Do they collaborate with anyone while or before editing? Why and how?
   d. How do they troubleshoot editing on Wikipedia?
      i. How do new editors seek help? (When, where, and why do they ask for help? What do they ask for?)
      ii. When have they not been able to find the help or support they need? What do they do in these instances?
   e. What tools, functionalities, and/or bots do they use to edit?
      i. How do they use Wikipedia’s editing tools? How do they use other contribution tools on Wikipedia?
      ii. What do they like or dislike about Wikipedia’s editing tools?
      iii. How has their use of these tools and functionalities changed over time?
      iv. Are there any workarounds that they use?

8. How do new contributors of Czech/Korean Wikipedia interact with other members of the wiki community?
   a. How do contributors interact with other contributors, and for what purposes?
      i. When do these interactions happen?
      ii. What are the channels over which these interactions take place?
iii. How do they find each other on Wikipedia?
iv. How do these interactions change over time?
b. **For new editors:** How do they interact with other members of the wiki community? What impact do these interactions have on their contributions?
i. How did they first learn of the social aspects of Wikipedia?
ii. What types of support or barriers do other members of the wiki community provide to new editors?
iii. How have these interactions encouraged or discouraged new editors’ contributions to Wikipedia?
c. **For patrollers or mentors:** Why and how do they interact with new editors?
   i. What interests them in working with new editors? What are their goals in doing so?
   ii. What roles do they play in interacting with new editors? How and why do people choose particular roles? How do these roles change over time?

## IV. Research Methodology

**Prior to In-Country Research**

**Documentation Review**

**Past Research**

The WMF project team will review existing documentation on previous efforts to understand and engage with editors of Wikipedia. These will include: results from previous relevant surveys and research, and documentation of previous initiatives and activities.

**Focus:** Reviewing documentation will help the research team understand how Wikimedia, and others, have previously sought to understand and/or engage with editors of Wikipedia. It will help ensure the project builds on existing knowledge and is aware of potential sensitivities.

**Editing Functions**

The Reboot project team will review existing editing processes and tools, through documentation of ideal editing processes, editing Wikipedia, and conversations with the Editing team.

**Focus:** Understanding the basic editing functions of Wikipedia, and how the Editing team views these processes, will allow the project team to craft research instruments to probe on Wikipedia’s editing functions and tools.

**In-Country Research**

Field research in South Korea and the Czech Republic will be conducted using design research methods—that is, contextual inquiry using primarily ethnographic research methods.

Design research emphasizes immersive observation and in-depth, semi-structured interviews with
individuals to understand the behaviors and rituals of people interacting with each other, with products and services, and with their larger environment. It stresses interactions with respondents in their natural setting, and observing respondents in the day-to-day lives to understand deeper needs, motivations, and constraints. To understand underlying motivations and drivers, researchers probe for the why’s and the how’s behind stated and observed behaviors.

In-country research teams will consist of project team members from the WMF New Editors Experiences team (Neil Quinn and Abbey Ripstra), Reboot (Panthea Lee and Lauren Gardner), and two local researchers in each country who are fluent in Korean/Czech—with a total of 6 research team members in South Korea, and 5 in the Czech Republic.

Individual Interviews

Semi-structured individual interviews will be the primary research tool during country research. A typical interview will be 1.5 hours in duration, and conducted by a team of two to three researchers: one focused on interviewing and one or two focused on documentation. These interviews will be conducted in either Korean or English, depending on the respondent’s language fluency in either. When possible, these will be conducted in-context and in private—for example, in respondents’ homes, workplaces, or other natural and/or relevant locations. This allows researchers to observe and ask about artifacts in the environment that may give greater insight into the respondents’ experiences. Interviews will be guided primarily by open-ended questions and wherever possible, researchers will ask respondents to show (whether using physical artifacts, or by recalling a specific incident or experience) rather than describe what they mean.

Focus: Interviews will be used to probe all three research themes. They will be used to achieve deep and nuanced understandings on different aspects of user experience, and will focus on respondents’ attitudes, behaviors, experiences, and challenges with regards to online contribution.

User Observation

User observation will be a secondary tool in country research, and conducted as specific activity within individual interviews. Observing respondents as they live, work, and use different products or services can be revelatory—it allows researchers to identify otherwise unarticulated needs, motivations, habits, and challenges that may be subconscious to respondents themselves. Researchers may ask the respondent to “think out loud”, meaning to articulate their thoughts as they go about different tasks to provide researchers insight into their thought process and how they react to different environmental stimuli and/or design features. Researchers will video record these observations to share back with the wider Editing team after the sprint.

Focus: User observation will focus primarily on research theme 3, to observe how users currently contribute to, or edit, Wikipedia. User observation will particularly focus on behaviors currently opaque to the WMF, such as: edit review workflows; how people edit on mobile; how people decide what to edit or contribute; how people find the help they need to contribute.

Expert Interviews

The research team will meet with experts in relevant Czech and Korean communities, both online and

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1 Panthea Lee from Reboot will only travel to South Korea.
offline, with a preference toward those who lead or are actively involved in online, knowledge sharing communities or fora. These interviews will be less structured, and for efficiency, may be conducted as focus group discussions.

**Focus:** Expert interviews will focus on research theme 1, and lightly on research theme 3, to understand how and why people contribute to communities and fora similar to Czech and Korean Wikipedias. These interviews will provide opportunities to i) compare and interpret research data within the context of local community contribution; and ii) better understand cultural norms and behaviors related to contribution.

**Synthesis**

During the field research, the research team will conduct nightly research synthesis to share what has been learned during the day, surface emerging themes and new questions, and assess what is or is not working in terms of the research protocol or instruments. These exercises will allow the team to align on priorities for the coming day, and to update and evolve the research framework, questions, and/or protocol on a regular basis.

**After In-Country Research**

**Synthesis Workshop**

Reboot will lead a structured, two-day synthesis workshop in San Francisco for the research team and the wider New Editor Experiences team to analyze research from both in-country research sprints. This workshop will aim to draw out key themes and findings, potential recommendations, needed research outputs, and areas for future exploration.

**V. Target Respondents**

**Individual Interviews & User Observation**

**Sampling**

Sampling for the majority of this research will come from the actual editor populations, primarily new editors, in Czech Republic and South Korea. For each country, there will be an estimated 40 respondents, to be adjusted based on the volume of expert interviews, selected according to the following criteria:

- **Editing engagement:**
  - **80% new editors** who have registered within the last 6 months
    - Program editors (contacted through leaders of programs like edit-a-thons and meetups): 10%
    - Organic editors (contacted through registered email addresses on the Czech/Korean Wikipedia user accounts)
      - Recent (registered in past month, some edits): 20%
      - Non-surviving (registered 1-6 months ago, not edited in last month): 20%
      - Surviving (registered 1-6 months ago, edited in last month): 30%
- **20% editors who interact with new editors** (i.e., patrollers, mentors):
  - On-wiki: 15%
  - Off-wiki: 5%

- **Location:** Based on available data from IP addresses of editors to Korean and Czech Wikipedias.
  - South Korea:
    - 70% in a major urban center (Seoul)
    - 30% in peri-urban (around Seoul)
  - Czech Republic:
    - 60% in a major urban center (Prague)
    - 20% in peri-urban (around Prague)
    - 20% in a secondary urban center (Brno or Ostrava) OR small city/town

- **Demographic Distribution:** Respondents will be distributed across the following demographic ranges:
  - **Age:**
    - 16 to 17 years old
    - 18 to 24 years old
    - 25 to 34 years old
    - 35 to 44 years old
    - 45 to 54 years old
    - 55 years and over
  - **Occupation:**
    - In school
    - Working
    - Unemployed
  - **Gender:**
    - Male
    - Female

- **Exclusion criteria**
  - People who have never tried to edit or contribute to Korean or Czech Wikipedia

**Recruitment**

Respondent recruitment will be conducted by a consultant recruiter managed by the WMF. Respondents who meet the sampling criteria will be identified through targeted outreach to email addresses of registered users and local wiki community networks.

Potential respondents will complete an initial short survey capturing their basic demographic information (i.e., age, gender, occupation) in order to provide an understanding of the potential sampling range before respondents are selected. In the case of a surplus of potential respondents, sampling will be selective to more heavily weight respondents from underrepresented and strategic populations, such as female editors.
**Expert Interviews**

Expert interviews (4-6 per country) will be conducted with leaders or active participants in other Czech or Korean contribution-based communities according to the following distribution:

- 60% from online communities or fora (i.e., Wikipedia’s local competitors)
- 40% from offline communities or fora (i.e., academic institutions, volunteer groups, religious institutions)

**VI. Respondent Consent & Data Management**

The research team will obtain informed consent from every respondent prior to conducting research with them, and provide opportunities to state or update their preferences with regards to the use of their data at the end of each research activity.

Prior to each research activity, a member of the research team will explain to the respondents how and in what formats their data may be used, and provide respondents ample opportunity to ask questions about the purpose or outputs of the research. They will then ask the respondent’s permission before proceeding with the research activity, and ask them to review and sign a short and easy-to-understand release form.\(^2\) If a respondent does not provide consent, research activities will stop and the researcher will thank the respondent for their consideration.

Respondents’ personal data will be coded in all written documentation and no identifying details will be captured in the project documentation.

Photographic data will be captured during most research activities, and video data will be captured during the user observation exercises only. Respondents will have the opportunity at the end of each research activity to review all photos and/or video footage that were taken of them and to, if they wish, delete any that they do not wish the research team to keep, or to provide specific restrictions on the usage of footage that may identify them.

All respondent requests around the management of their personal data will be captured in the respondent index, to direct and bound usage of that data in future, by both the project team and WMF.

**VII. Country Research Parameters**

**Dates & Duration**

Each country research trip will span 14 days. South Korea research will take place from May 17 to 30, 2017, and Czech Republic research will take place from June 13 to 26, 2017.

Note: The dates noted are full research days; as such, for travel purposes, team members are asked to arrive at the first research location prior to the first day of research (by late afternoon), and to book their departure from the last research location no sooner than the day after the final day of research.

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\(^2\) Reboot and WMF are developing release forms for the South Korea and Czech Republic research sprints that balances the comprehension abilities of a wide range of respondents and organizational legal considerations.
Locations
Country research will from two to three locations in each country, with a mix of: major urban center, peri-urban area, and secondary urban center or small city/town. Travel between locations will be done by road where possible. Research in South Korea will focus on Seoul and its surrounding areas. Research in the Czech Republic will be mainly concentrated in Prague and its surrounding areas, with additional travel to one secondary urban center or small city/town.

VIII. Risk Management
Several challenges and risks present hurdles to the success of the field research. The major strategic challenges are summarized below, along with mitigation strategies:

- **Bounding Research Scope**: This study represents foundational research for WMF, and is being supported by several different teams at WMF. Given the short duration of each country research trip, it will not be possible to cover all the topics of interest to all WMF teams, and at a depth that may be desired. Discussion of potential trade-offs during project inception, participation of cross-team WMF staff in field research, check-ins with the broader team during research to confirm priorities will help mitigate this challenge.

- **Recruiting Target Respondents**: Previous research activities faced difficulties in recruiting respondents that fit target profiles. This will be mitigated by defining minimum (rather than absolute) targets across different inclusion criteria, in anticipation of likely operational challenges in the field and to remain open to the possible respondents that surface as researchers snowball the sample.

- **Eliciting Honest Responses**: Country research teams will be comprised of approximately half of researchers that are from outside the countries of research, and with limited to none ability in local languages. This presents both opportunities and challenges to eliciting honest and meaningful responses from participants. This will be mitigated by the pairing of one local researcher to one international researcher, and the research team will observe research dynamics and adjust protocol accordingly.

- **Limited Field Time**: The research sprints are only 14 days in duration, presenting a limited window to explore the range of research questions presented. To mitigate this, the research team will aim to work 6 days a week with extended hours to maximize in-field research opportunities, and will aim to travel by road only to prevent unreliable air travel realities from disrupting research.

IX. Research Instruments

- The research script and guide details the structure for in-depth interviews and observations.
- The research tracker catalogs all interviews and their notes.