Wikipedia
Awareness, Attitudes & Usage Research
GERMANY

Project Context

As the Wikimedia movement begins defining their vision for the next fifteen years, they required foundational knowledge of their readers in high awareness countries, for their largest and most well-known project, Wikipedia. Among internet users, they required an understanding of Wikipedia's awareness, attitudes toward Wikipedia, and usage habits and patterns.

This presentation summarizes key findings and opportunities from online, quantitative survey research conducted in France, Germany, Japan, Spain, Russia, the United Kingdom, and the United States, in June 2017. Wherever possible, the questions used mirrored past research to help establish global benchmarks.

This presentation was prepared by Wellspring Insights & Innovation, Inc., a research and innovation firm based in Miami, Florida. Full field data from this study has been shared with WMF.

Content

Objectives

- To better understand awareness, attitudes, and usage of internet users in high-awareness countries and regions to inform the movement strategy direction for the next 15 years

- Gain insight into GenX, GenY and especially GenZ - the unique perspectives of younger users, as they will be our future readers

- Gain insight into how respondents in high-awareness regions and low-awareness regions differ or are the same (in comparison to New Reader and other research completed in the past)

- Scope is not intended to gain a complete understanding of all regions or insights that the movement might need for Brand identity research, product development, or other planned work streams.

- As applicable, a secondary benefit will be to help guide Wikipedia's future development and growth by identifying opportunities to expand awareness, attract new readers, improve positioning, and optimize product and service features.

Scope & Methodology

- The survey was fielded in France, Germany, Japan, Russia, Spain, the United Kingdom, and the United States via an online survey accessible on a PC, laptop or device (tablet, smartphone).

- A total of 1,150 surveys with internet users (individuals who can access the internet via any device type and connection) were completed in each country

- All respondents were between 13-49 years old; GenX 36 to 49 years, GenY 20-35, and GenZ 13-19

- Non-probability sampling was utilized.

- Participants were sourced from multiple online research panels to reduce bias by adding people from all socioeconomic levels, geography and interest.

- Quotas were established per country in order to balance the sample and provide a nationally representative population by age cohort, gender, ethnicity, household income and geography. All data has been weighted to reflect this balance.

Generation X, Y and Z definitions

	GENX 36-49 in our survey	GENY 20-35 in our survey	GENZ 13-19 in our survey
Iconic Technology	VCR, Walkman, IBM PC	Internet, Email, SMS, DVD, Ipod, Xbox	Iphone, Ipad, Google, social media, 4KHD, VR
TV & Movies	M-TV, ET	Pay TV, Titanic	Smart TV, Avatar
Influencers	Pragmatic practitioners	Experiential peers	User-generated forums

Sources: McCrindle Research, Vision Critical. 2012, 2015.

Key Findings

At the outset of this research our hypothesis was that, in Germany and other high-awareness countries, we would observe large differences in awareness, usage and attitudes toward Wikipedia between the generations; from Generation X's analog childhood to the digital natives of Generation Z.

By 2030, the oldest GenX'ers will be 63, heading toward their next, and perhaps final, career phase. The oldest GenY'ers will be 53, and have already made their mark on the world of technology, particularly in social media.

In 2030, the oldest members of Generation Z will turn 35, and they will have had a smartphone since they were about the age of 13. Already, they are being called the greatest visual communicators ever raised; creators, collaborators and curators of culture.

"Technology is an important component, but what's changed is this generation's (Z) relationship with culture. They are empowered, connected, empathetic self-starters that want to stand out and make a difference in the world." – the Wildness, 2015 research study.

Key Findings

In our survey we found that internet users in Germany between the ages of 13 and 49 are four times more likely to think of Google over Wikipedia when they "think about finding information online." Overall, 80% mentioned Google as compared to the next tier of sites including Wikipedia (19%), Yahoo! (16%), and Bing (12%).

More than half - across all three generations - include Wikipedia as one of the top three sites they go to when they want to find information online. Half of GenY and close to two-thirds of GenZ include YouTube as one of their top three sites for information.

About 36% of GenZ first found out about Wikipedia at school and regardless of the device they access it on, chances are they are working on homework. GenX and Y are more focused on looking up topics that interest them personally, but as the device gets smaller they shift more "in-the-moment," looking up topics on Wikipedia that were referenced in the media or in conversation.

Overall, internet users in Germany have a good handle on Wikipedia and how it works. About two-thirds know it is a non-profit, half know it's funded primarily by reader donations, and sixty-percent know that its content is created by volunteers. GenZ is only slightly less knowledgeable.

WIKIPEDIA
The Free Encyclopedia

Key Findings

Regarding usage, only 44% of GenZ in Germany reads Wikipedia on a weekly basis, vs. 69% of GenX and 70% of GenY. This is similar to patterns seen in other countries. This may be owing to their focus on schoolwork, 55% read it a few times a month or less.

A majority of readers navigate to Wikipedia via regular search links or the Google Knowledge Panel, and 38% of GenX readers go directly to the site, typing wikipedia.org into the address bar.

Readers say that being useful, high quality, free knowledge for all, and comprehensive are the most important to them personally. They most strongly associate Wikipedia with: being **useful**, **free knowledge**, **comprehensive** and **free of advertising**.

At the other end, transparency and neutrality were the words least associated with Wikipedia.

Free of advertising and transparency are the least important to German readers.

Key Findings

Finally, when it comes to enhancing Wikipedia readers' experience, the generations are in general agreement that the top enhancements would be more trustworthy content (45%), higher quality content (38%), and improved readability (30%).

Overall, 34% (38% of GenZ vs. 29% of GenX) also say that more visual content would improve their experience "a lot."

GenY and GenZ are more likely to say improved local language content and improved site design would enhance their experience, than GenX readers.

Only 20% say more interaction with other readers would not enhance their experience at all.

Wikipedia Awareness

Germany internet users by Generation
Total Base: 1150
Weighted Data
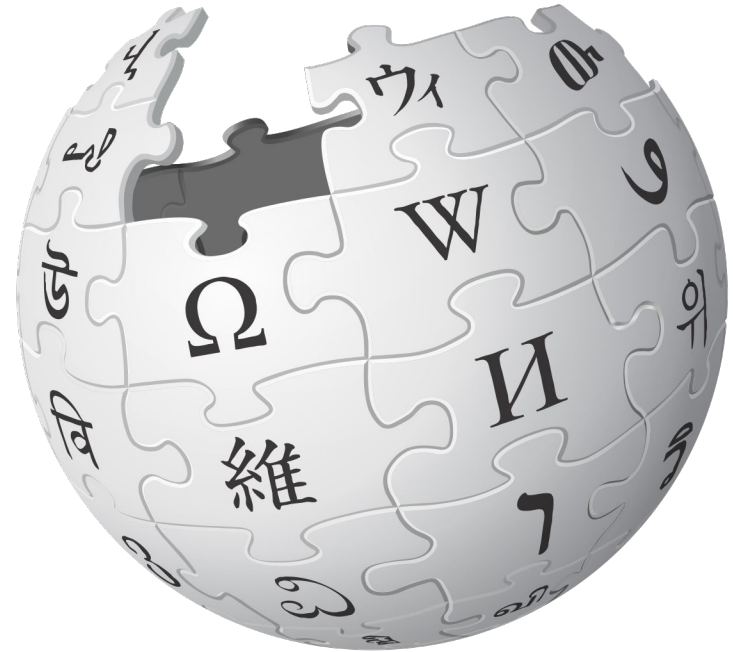
We asked internet users in Germany what website came to mind when they want to find information online.
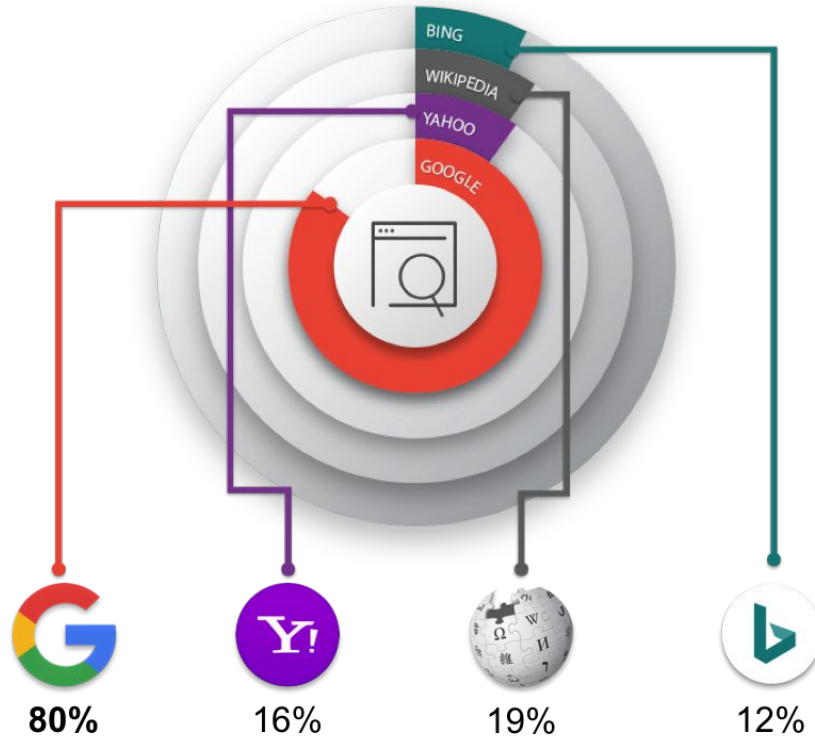
80% mentioned Google first.

19% mentioned Wikipedia.

In total mentions, Google had 80% and Wikipedia 19%.

Q6: When you want to find information online, what websites come to mind? Total Mentions. Base: 1150

80%   16%   19%   12%

Wikipedia may not be top-of-mind, but 85% of internet users in Germany are aware of it.

And 55% say it is one of the Top 3 sites to go to when they need information.

Top 3 Sites for Information

Q7a: When you want to find information online, what three
websites would you say you go to most often? Base: 1150

More than half - across all three generations - include
Wikipedia as one of the top three sites they go to when they
want to find information online.

Half of GenY and close to two-thirds of GenZ include
YouTube as one of their top three sites for information.

	GenX	GenY	GenZ
Google	92%	94%	92%
Wikipedia	55%	56%	56%
YouTube	40%	50%	64%
Facebook	30%	32%	24%
Yahoo!	12%	5%	11%
Spiegel Online	7%	5%	4%
Quora	3%	0%	3%
Twitter	3%	5%	7%
Reddit	1%	4%	4%

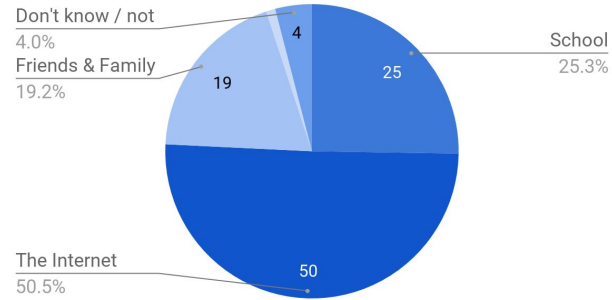# While GenX and GenY first found Wikipedia on the internet, GenZ is as likely to first find out about it at school.

Q8: Where did you first find out about Wikipedia?
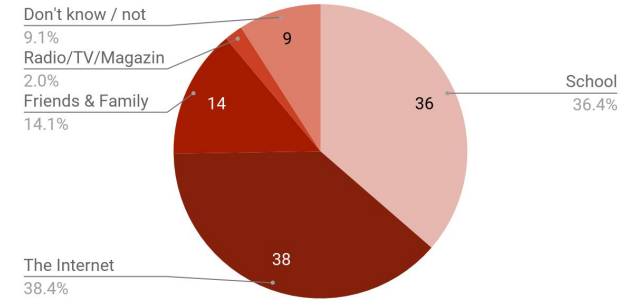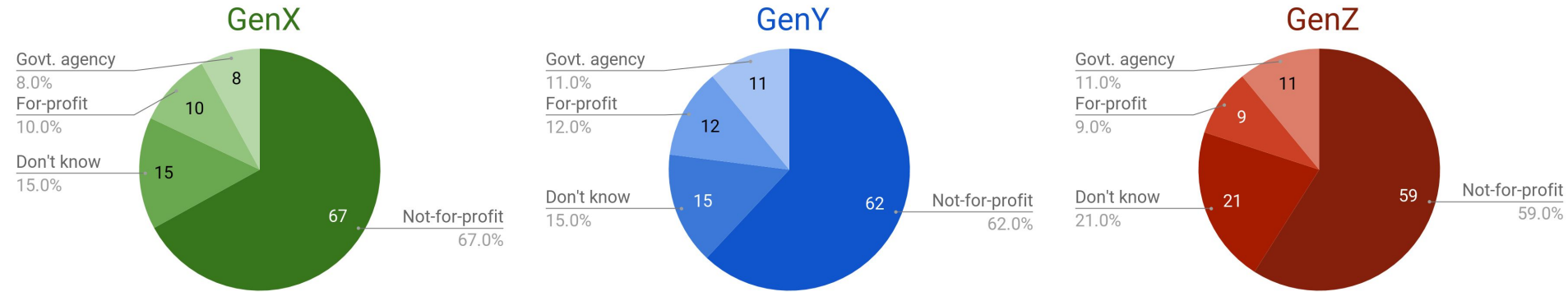Base: 993 Aware Wikipedia.

GenX

Don't know / not
8.1%
Radio/TV/Magazin
2.0%
Friends & Family
18.2%

18

8 4

School
4.0%

67

The Internet
67.7%

GenY

Don't know / not
4.0%
Friends & Family
19.2%

19

4

School
25.3%

25

The Internet
50.5%

50

GenZ

Don't know / not
9.1%
Radio/TV/Magazin
2.0%
Friends & Family
14.1%

14

9

School
36.4%

36

The Internet
38.4%

38

WIKIPEDIA
The Free Encyclopedia

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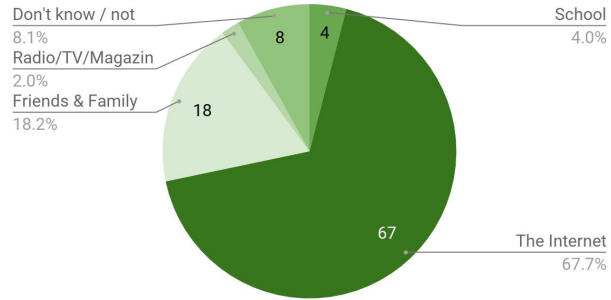
Most internet users in Germany have a good handle on Wikipedia.

About two-thirds know it is a non-profit, half know it's funded primarily by reader donations, and

sixty-percent know that its content is created by volunteers. GenZ is slightly less knowledgeable.

About two-thirds of GenX and GenY know it is a not-for-profit, while four of ten GenZ internet users "don't know."
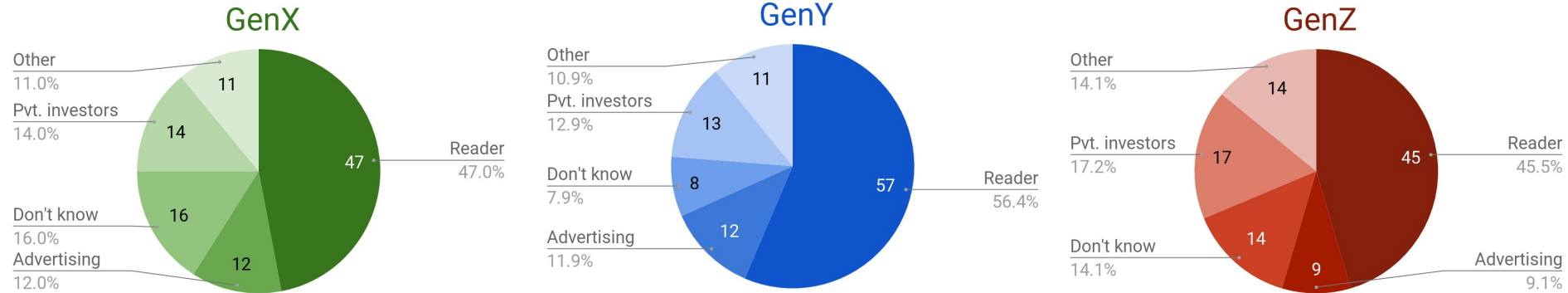
Q9: To the best of your knowledge, which of the following best describes
the organization that manages Wikipedia? Base: 993 Aware Wikipedia.

GenX

Govt. agency
8.0%
For-profit
10.0%

Don't know
15.0%

8

10

15

67

Not-for-profit
67.0%

GenY

Govt. agency
11.0%
For-profit
12.0%

Don't know
15.0%

11

12

15

62

Not-for-profit
62.0%

GenZ

Govt. agency
11.0%
For-profit
9.0%

Don't know
21.0%

11

9

21

59

Not-for-profit
59.0%

One quarter of GenZ internet users think Wikipedia is funded by advertising, and other 23% "don't know"

Q10: How do you think Wikipedia is primarily funded?
Base: 993 Aware Wikipedia.

GenX

Other 11.0%
Pvt. investors 14.0%
Don't know 16.0%
Advertising 12.0%

47 — Reader 47.0%
11
14
16
12

GenY

Other 10.9%
Pvt. investors 12.9%
Don't know 7.9%
Advertising 11.9%

57 — Reader 56.4%
11
13
8
12

GenZ

Other 14.1%
Pvt. investors 17.2%
Don't know 14.1%

45 — Reader 45.5%
9 — Advertising 9.1%
14
17
14

18

About half think content is created and maintained by volunteers, and another 20% say Wikipedia staff.

Q17: To the best of your knowledge, how is information primarily created and maintained on Wikipedia? Base: 961 Wikipedia Readers.

GenX

Paid freelancers
5.0%
Don't Know
20.0%
Wikipedia staff
19.0%
Volunteers
56.0%

5
20
19
56

GenY

Paid freelancers
9.0%
Don't Know
11.0%
Wikipedia staff
14.0%
Volunteers
66.0%

9
11
14
66

GenZ

Paid freelancers
9.0%
Don't Know
14.0%
Wikipedia staff
22.0%
Volunteers
55.0%

9
14
22
55
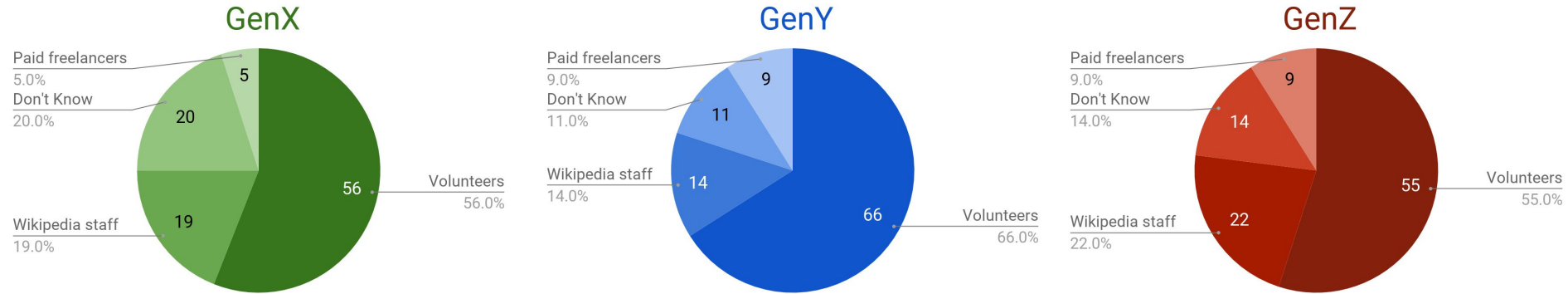
Wikipedia Usage

Germany internet users by Generation
Total Base: 1150
Weighted Data

WIKIPEDIA
The Free Encyclopedia
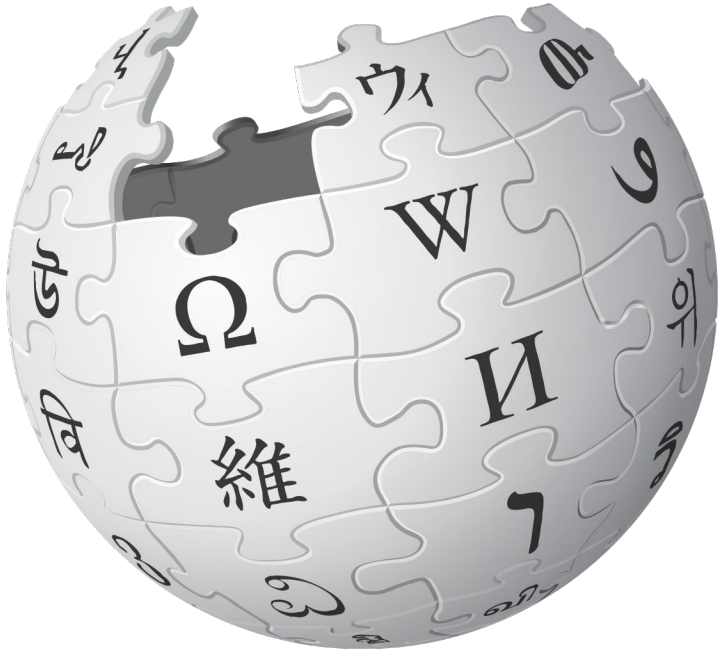
Awareness & Usage Summary

Germany has strong awareness and readership across all three generations.

	GenX	GenY	GenZ
Aware of Wikipedia	85%	88%	87%
Read Wikipedia	82%	85%	85%
Never read Wikipedia	4%	3%	2%
Unaware of Wikipedia	15%	12%	13%
Total non-reading population	18%	15%	15%

WIKIPEDIA
The Free Encyclopedia

Only 44% of GenZ reads Wikipedia on a weekly basis, vs. 69% of GenX and 70% of GenY.

Q14: How often do you read Wikipedia?
Base: 961 Wikipedia Readers.

Legend: ■ GenX ■ GenY ■ GenZ

	Once a month or less	A few times a month	Once a week	Several times a week	Once a day	Several times a day
GenX	12%	19%	12%	39%	8%	10%
GenY	8%	22%	12%	39%	9%	10%
GenZ	26%	29%	14%	25%	2%	3%
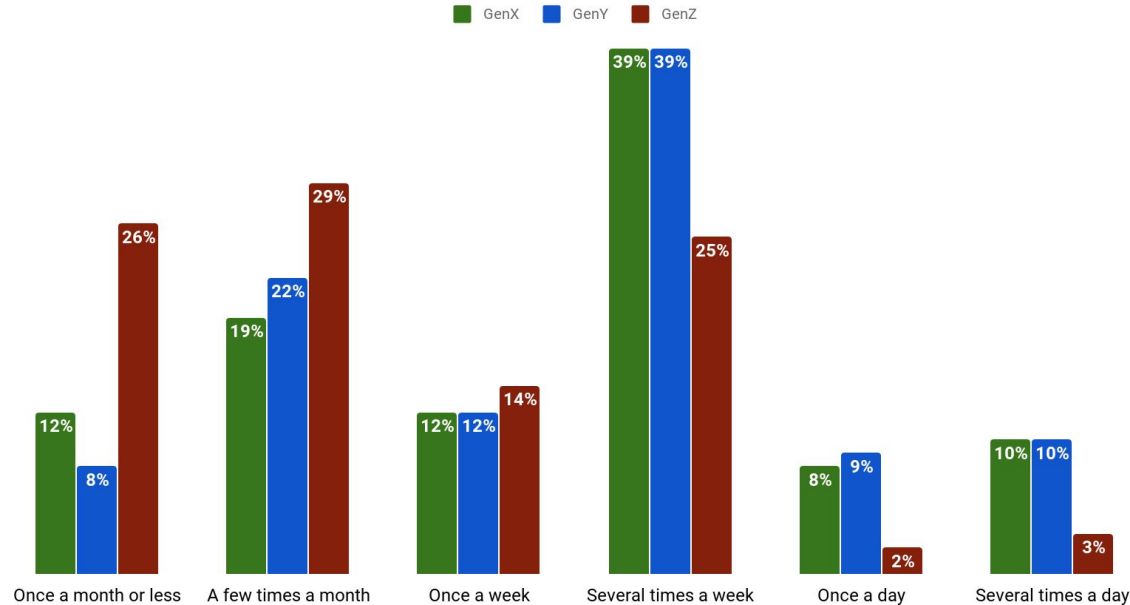
About 40% GenX and GenY read primarily for information seeking, while 41% GenZ read to help them study.

Q15b: Overall, would you say you use Wikipedia primarily to _____.
Base: 961 Wikipedia Readers.

■ GenX ■ GenY ■ GenZ

	Find more information about a topic you are seeking	Discover new knowledge	Fact check	Help you study	Pass time/explore for fun	Learn more about developing news stories
GenX	42%	28%	18%	6%	3%	2%
GenY	39%	29%	9%	13%	5%	6%
GenZ	21%	24%	7%	41%	2%	4%

WIKIPEDIA
The Free Encyclopedia
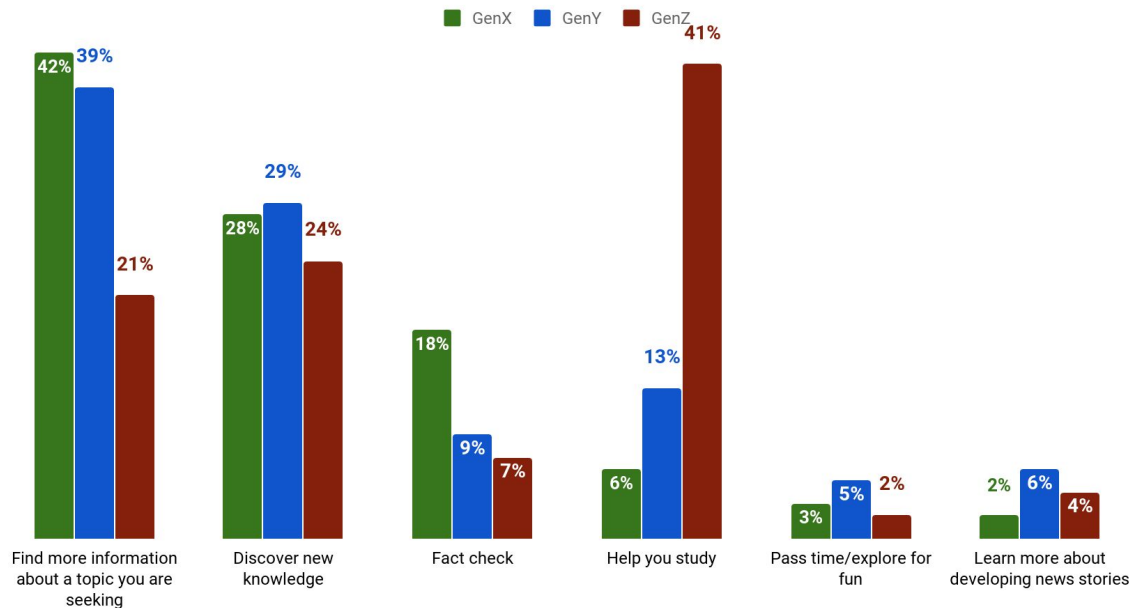
Most follow search links or click on the knowledge panel, while about two-thirds continue to go directly to the site.

Q16: What are all of the ways you find Wikipedia articles, or get to
Wikipedia articles? (Answer all that apply) Base: 961 Wikipedia Readers

■ GenX   ■ GenY   ■ GenZ

	Regular search links	The knowledge panel from Google	Type Wikipedia.org into the address bar	Social media sites	The Wikipedia app	Services such as Siri, Alexa, etc.	Wikipedia is your home page
GenX	53%	28%	38%	13%	21%	11%	12%
GenY	56%	40%	35%	17%	17%	14%	14%
GenZ	54%	42%	30%	14%	12%	13%	15%
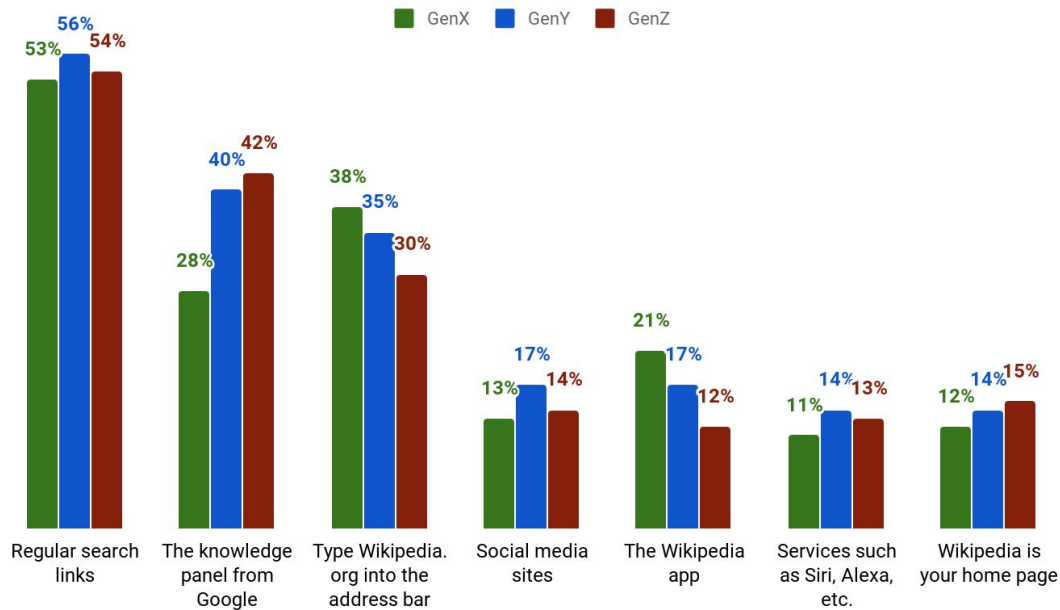
Over two-thirds of GenZ readers say they use a smartphone "often" to access Wikipedia, while laptops are most popular among GenX and Y.

Q15: Please indicate how often you use each the following devices to access and read Wikipedia.
Base: 961 Wikipedia Readers.
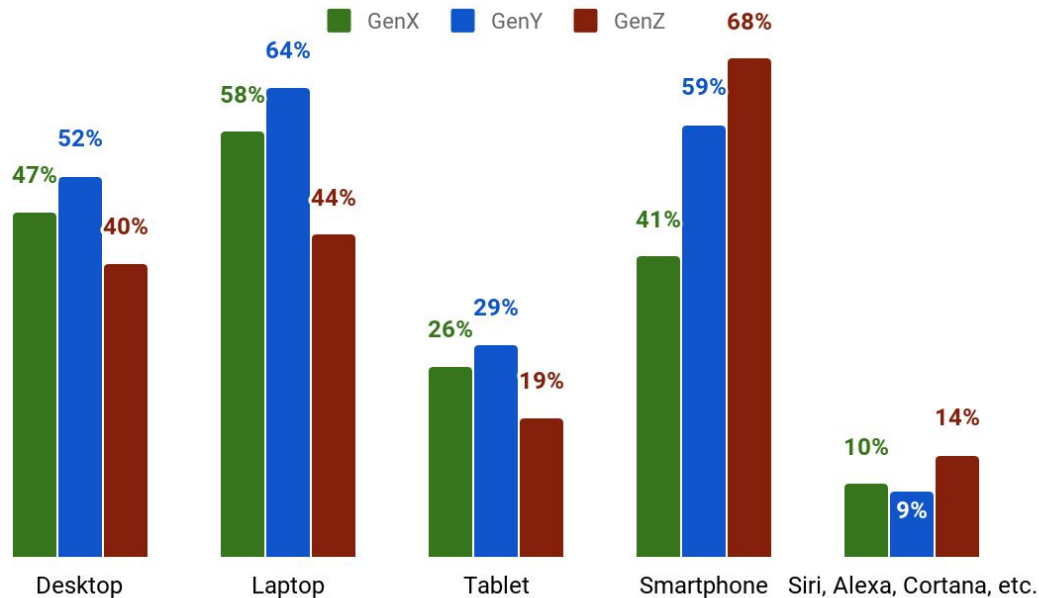
GenZ skews to school assignments regardless of the device. **GenX** in Germany is focused on topics that are personally important to them. Tablets and smartphones are used more to look up conversational or media topics.

|		**GenX**	**GenY**	**GenZ**
Desktop		A topic I want to learn more about **69%**	A topic I want to learn more about **59%**	Work or school assignment **74%**
Laptop		A topic I want to learn more about **67%**	A topic I want to learn more about **57%**	Work or school assignment **74%**
Tablet		A conversational topic - **54%** Topic I want to learn about - 51%	To learn more about a topic referenced in the media - **45%** Current event - **41%**	Work or school assignment **66%**
Smartphone		A conversational topic - **49%** Topic I want to learn about - 50%	To immediately look up a conversational topic - **50%** Topic referenced in media - **45%**	Work or school - **67%** Topic I want to learn more about - **51%**
Digital Voice Asst.		A topic I want to learn more about - 46% Topic referenced in media - **35%**	Current event - **38%** To immediately look up a conversational topic - **37%**	Work or school - **45%** To immediately look up a conversational topic - **42%**

Q15a: When you access Wikipedia on your _____, what do you read it for? Base: Access Wikipedia via device.

# Across the generations a quarter or less have tried to edit a Wikipedia article.

Q18a: Have you ever tried to edit a Wikipedia article?
Base: 961 Readers who know anyone can edit.

GenX — Yes 19.0% / No 81.0%
GenY — Yes 27.0% / No 73.0%
GenZ — Yes 26.0% / No 74.0%

27
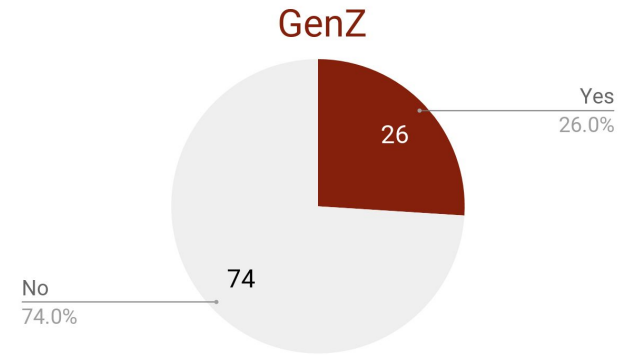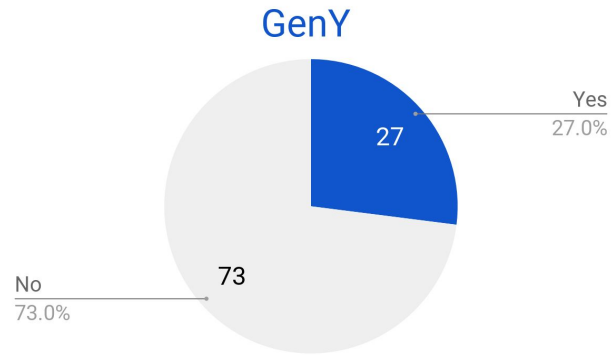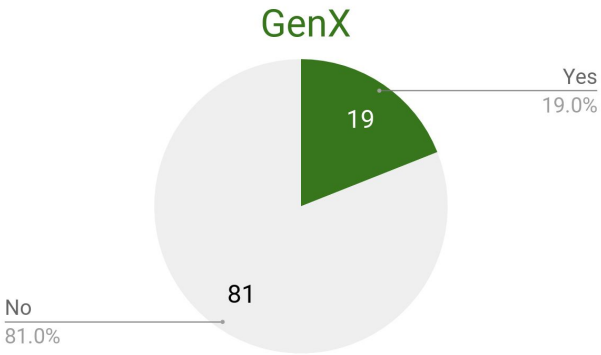
Two factors prevent most people from trying; a lack of interest or the fear of making mistakes. GenZ is most like to lack interest.
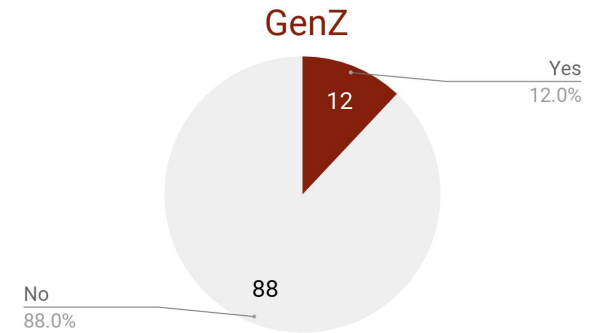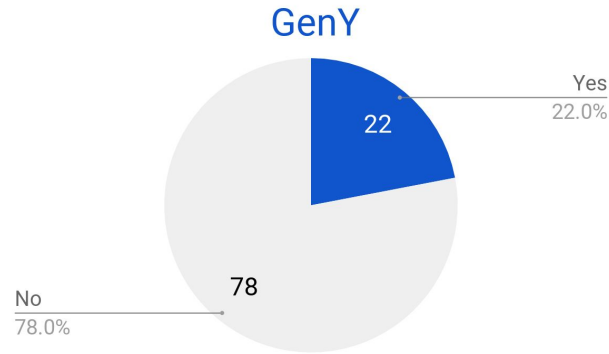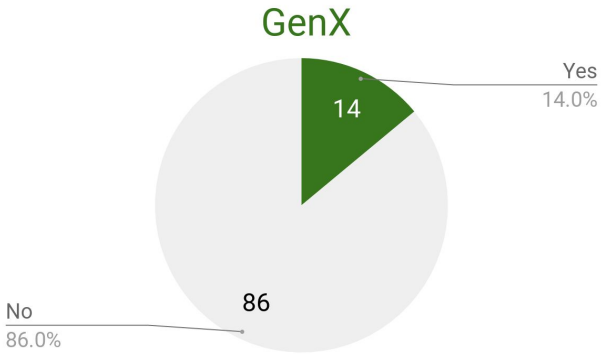
Q18b: Which of the following best explains why you have never tried to edit a Wikipedia article? Base: 787 Readers who have <u>never</u> tried to edit.
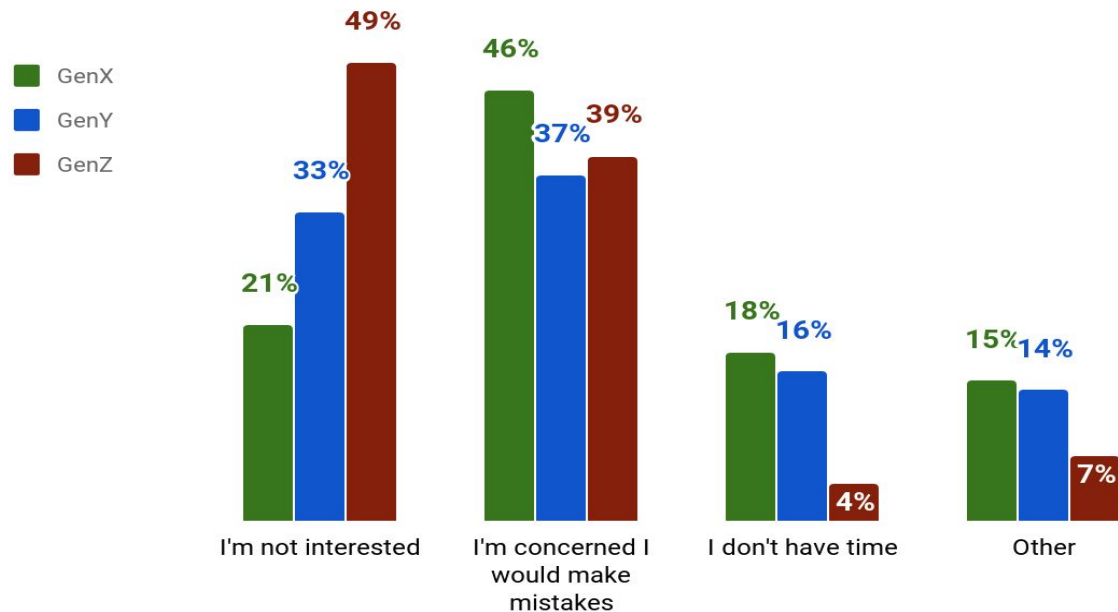
Across the generations, eight out of ten or more readers have never made a donation to Wikipedia.
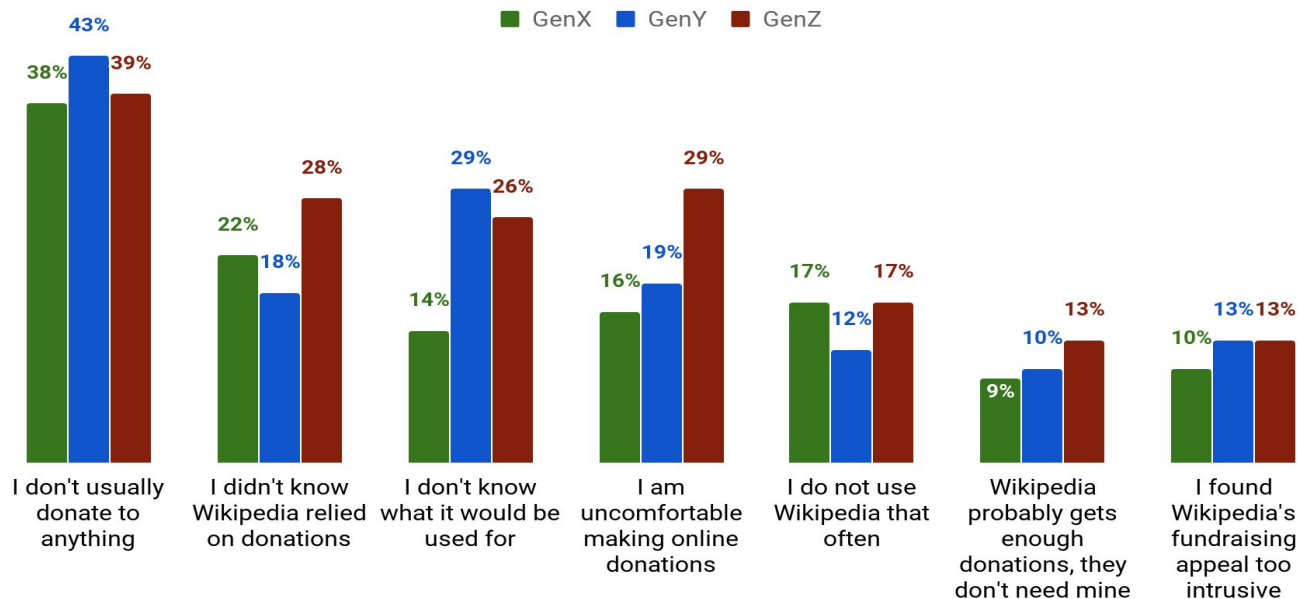
Q19: Have you made a financial donation to Wikipedia?
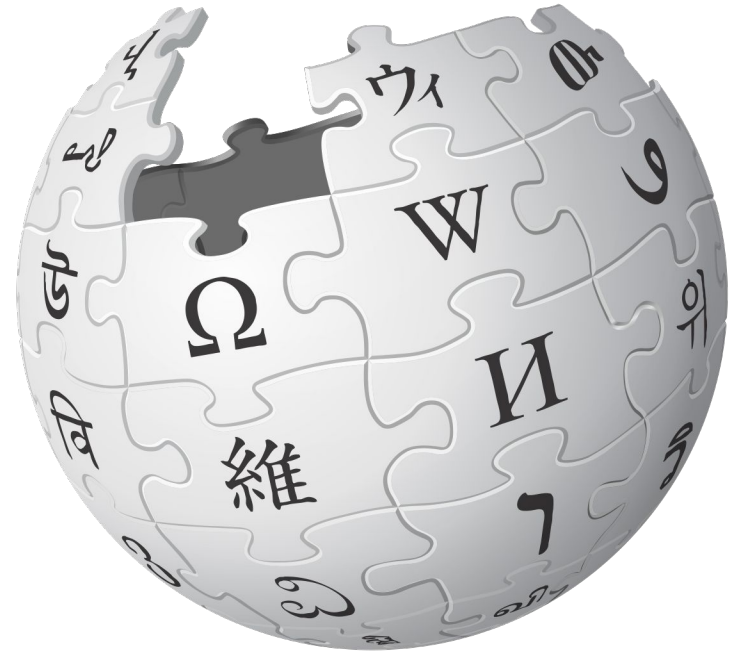Base: 961 Wikipedia Readers.

GenX — Yes 14.0% (14), No 86.0% (86)
GenY — Yes 22.0% (22), No 78.0% (78)
GenZ — Yes 12.0% (12), No 88.0% (88)

About four out of ten say they either didn't know Wikipedia relied on donations, or what the donation would be used for.

Attitudes toward Wikipedia

Germany internet users by Generation
Total Base: 1150
Weighted Data

Readers find being useful, high quality, and free knowledge the most important to them. They associate Wikipedia most strongly with being useful and free knowledge, and least with transparency.
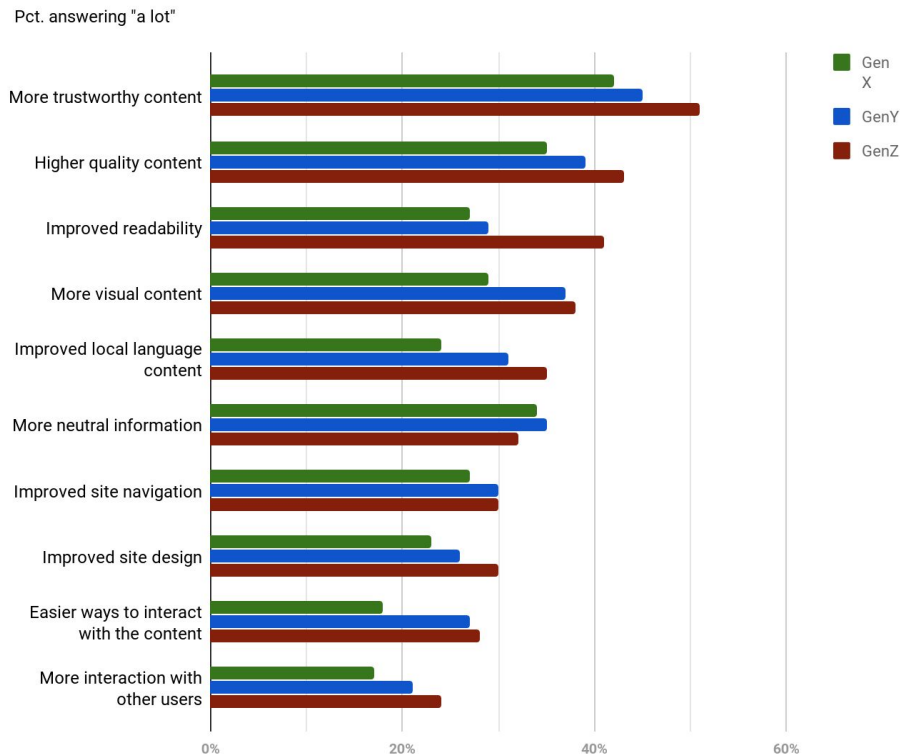
	GenX		GenY		GenZ	
	Mean Association Rating	Personal Importance Ranking	Mean Association Rating	Personal Importance Ranking	Mean Association Rating	Personal Importance Ranking
Useful	8.6	1	8.5	1	8.4	1
High Quality	7.8	2	7.2	2	7.2	2
Free knowledge for every person	8.6	3	8.4	T3	8.6	T3
Comprehensive	8.1	4	7.8	T3	8.0	T3
Easy to read	8.0	5	7.4	4	6.2	4
Professional	7.7	6	7.1	6	7.3	5
Neutral, unbiased content	7.6	7	7.1	5	7.2	6
Free of advertising	7.8	8	7.8	7	7.5	7
Transparency	7.6	9	6.9	6	6.2	8

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GenZ is more likely to say more trustworthy and higher quality content, and improved readability would enhance their experience "a lot."

Q22a: As a Wikipedia reader, please indicate how much each of the following changes would enhance your personal experience? A lot, a little, or not at all. Base: 961 readers.

Pct. answering "a lot"

THANK YOU