



Mobile Research Study

July 30, 2013

Agenda

- ✓ Project Scope
- ✓ Methodology
- ✓ 7 Key Learnings
- ✓ Takeaways / Next Steps

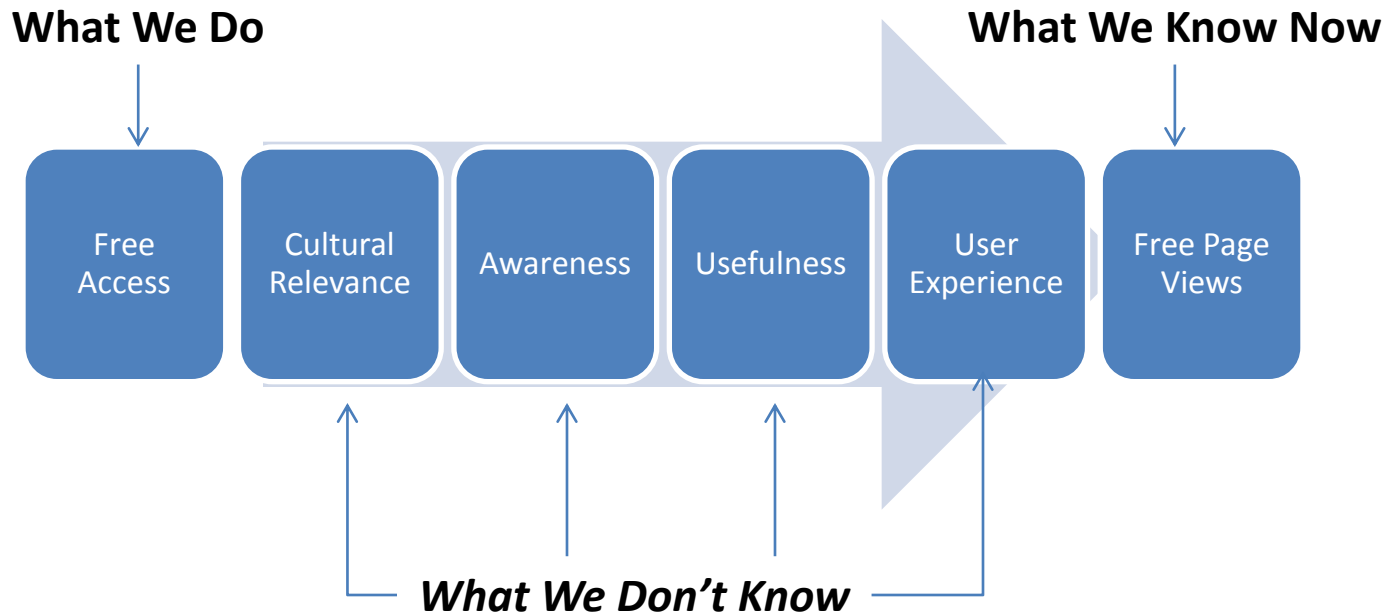
Project Scope

- ✓ Uncover the behaviors, norms, and attitudes that may inhibit or encourage people in Africa from using Wikipedia via Wikipedia Zero
 - Themes that can be applied throughout the Global South
 - Insights should be used to execute positioning and marketing strategy (partner marketing and WMF tactics)
- ✓ Core Question - Is there anything fundamentally different in developing countries in terms of perception and utility of Wikipedia?

Comscore, June 2013

	% of Total Internet that accesses Wikipedia	Average visits per Unique Visitor / month	Page views per Unique Visitor / month
North America	42.3 %	6.3	18.0
Middle East Africa	28.7 %	3.5	8.3

Project Scope



Methodology

- ✓ Intelcon – research consultancy focused on Information and Communication

Technology in emerging markets



- Expertise in field studies
 - Several projects on mobile access & applications
 - Has advised on leveraging ICT for socioeconomic development & inclusion
 - Past projects (Mobile usage at Base of Pyramid in South Africa, Project review of Uganda Village Phone, Rural telecom policy for Tanzania)
- ✓ Wikipedia study commissioned
 - Mobile-research via Jana in 9 countries x 500 each = 4500 respondents (self-selecting); Uganda, Kenya, Tanzania, Nigeria, Indonesia, India, Pakistan, South Africa, Bangladesh
 - Deep-dive field study in Uganda and Botswana
 - 3 focus groups each
 - 500 face-to-face surveys each; equal M/F split. 2/3 Urban, 1/3 Rural

Methodology

JANA

Products

Insights

Case Studies

Global Partnerships

About

Contact

Team

Board

Our Vision

Careers

In the News

About Jana

Jana is the Sanskrit word for "people"

- ✓ Jana was commissioned to do a survey in 9 countries with total respondents of 4,500
- ✓ A pilot of 500 in India was conducted
- ✓ Jana is the world's largest mobile research platform
- ✓ With integrations into the billing systems of 237 mobile operators, Jana can instantly reward 3.48 billion emerging market consumers in 70 local currencies with prepaid airtime
- ✓ Respondents click on a link, register, and fill out a simple 10 questions survey and earn airtime that is immediately credited to their mobile phone as their reward
- ✓ Based on a mobile platform that is optimized for all types of web-enabled phones
- ✓ However, respondents are random as they self-select and not necessarily representative.

Methodology

Indicator	Botswana	Uganda
GDP per capita (PPP) (2012)	16,800	1,400
Literacy rate	84.5%	66.8%
Urban/rural split	61% urban 39% rural	13% urban 87% rural
Median age	22.5	15.1
Mobile penetration (2011)	142.8%	48.4%
Average Revenue per User (mobile only)	USD 9.2	USD 2.5 – 3.56
Mobile broadband penetration	17% (339,926)	7.56% (2,692,705)
Prepaid subscribers	98%	99.1%

Sources: Mobile penetration, Percentage of individuals using the Internet: ITU; GDP per capita, Literacy, Median age, Urban-rural: CIA World Factbook,

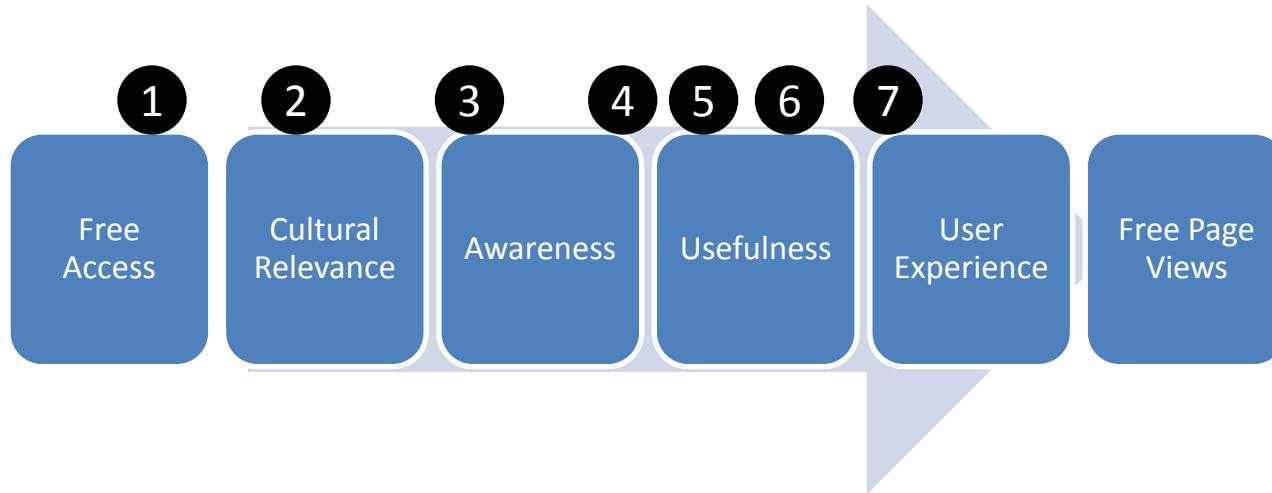
Methodology



in absolute figures	Uganda	Botswana
<i>Total</i>	500	501
<i>Male</i>	250	247
<i>Female</i>	250	254
<i>Capital</i>	230	285
<i>2nd city</i>	170	132
<i>Rural</i>	100	84
<i>Non-users</i>	242	252
<i>Wikipedia users</i>	258	249
<i>Mobile Wikipedia users</i>	213	153
<i>Orange subscribers</i>	67	237

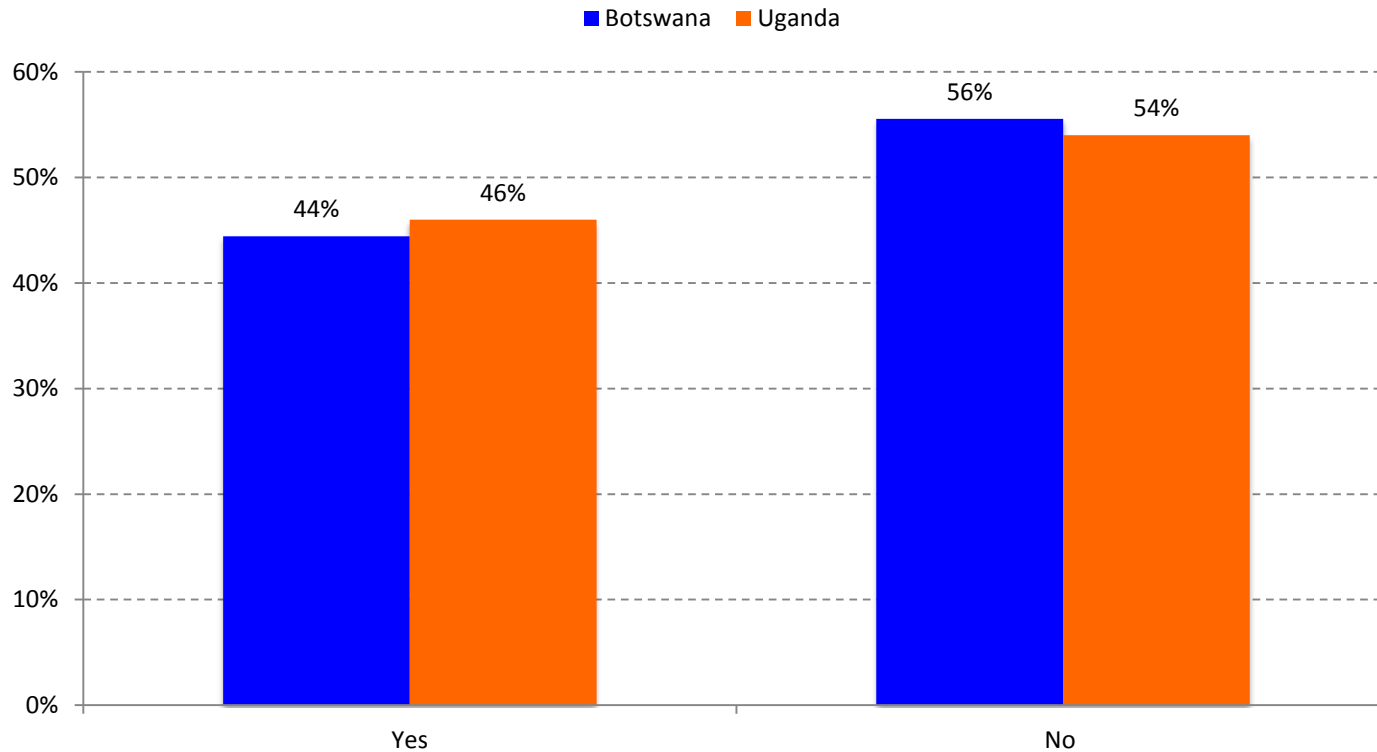
7 Key Learnings

7 Key Learnings



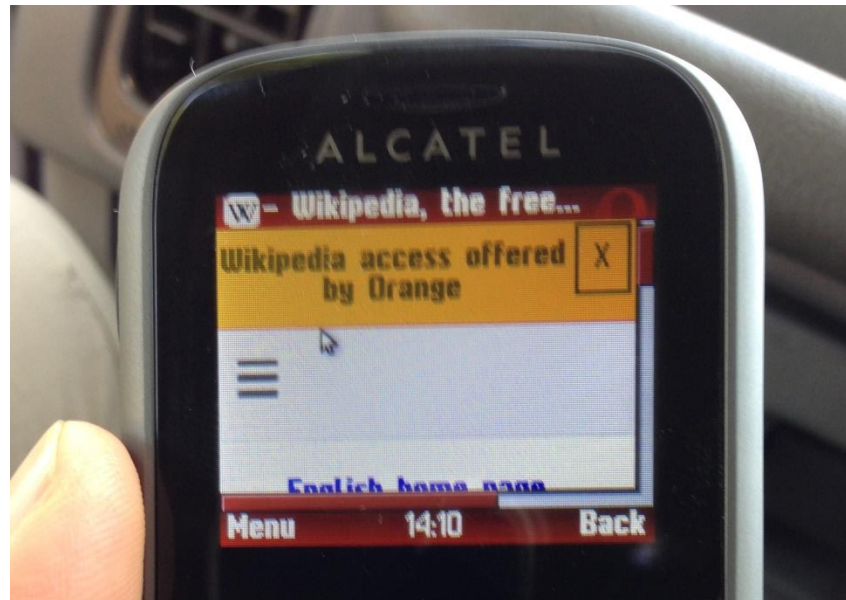
Learning 1: Half of the people that use Wikipedia free don't even know it's free

Q32: 400 interviews: Orange subscribers: Do you know that access to Wikipedia on your mobile is free for Orange subscribers?



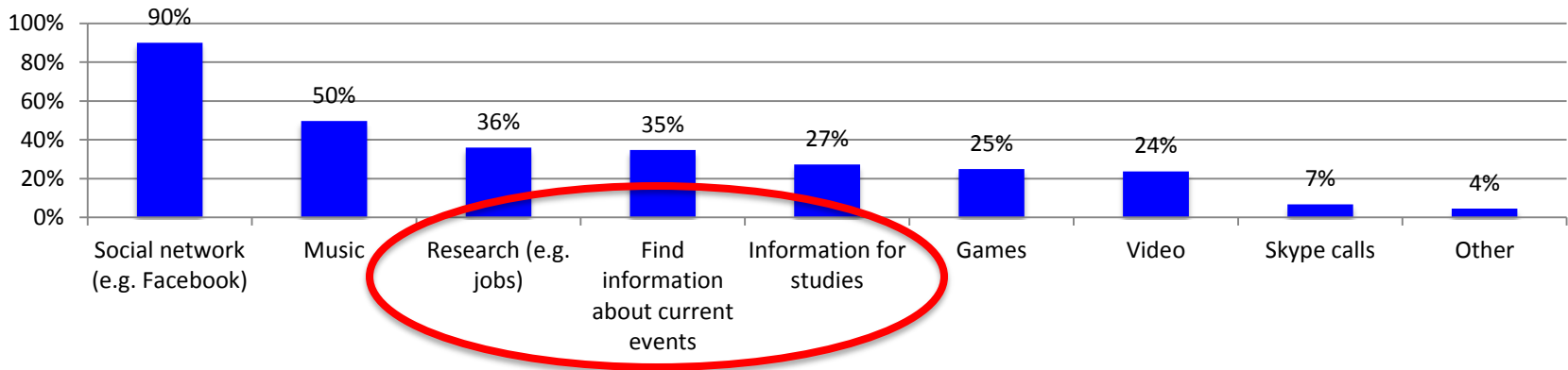
Learning 1: Implication

- ✓ Change our banner messaging with Orange > Use “Free Access” instead of “Access offered by”
- ✓ Nobody wins when the user doesn't know it's free > Ammo for carriers to use marketing to optimize their ROI

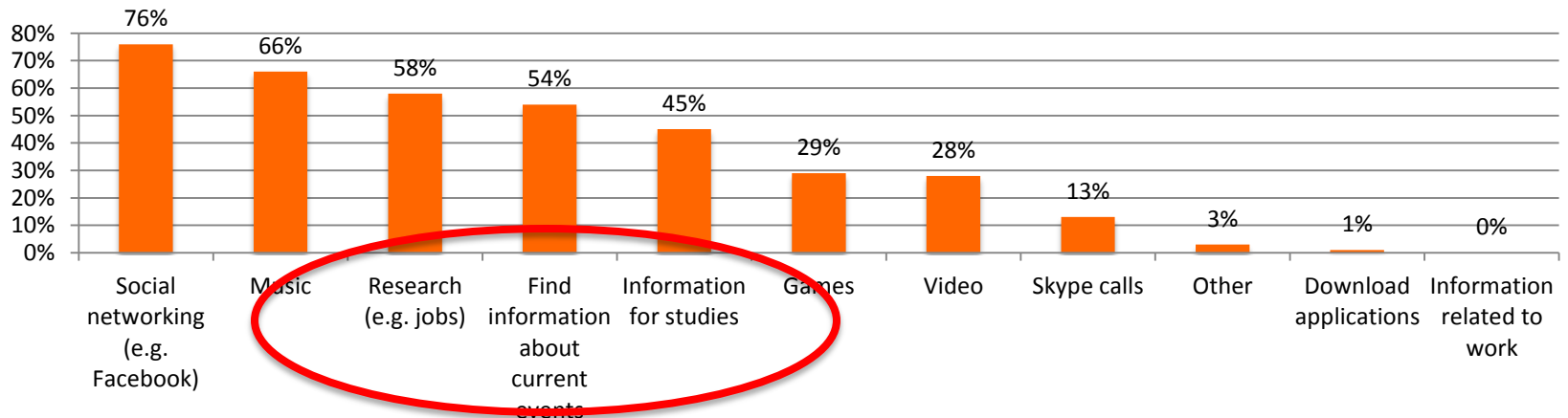


Learning 2: People are not just waiting for someone to hand them free information

Botswana: Q14. 400 interviews: For which type of activity do you use the Internet on your mobile most?

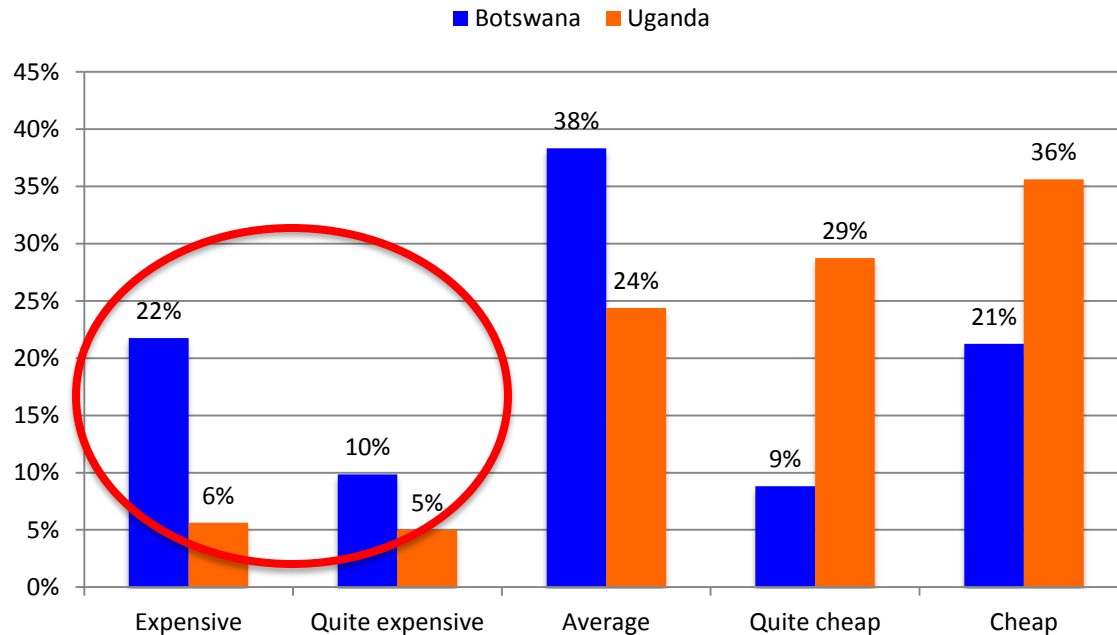


Uganda: Q14. 400 interviews: For which type of activity do you use the Internet on your mobile most?



Learning 2: People are not just waiting for someone to hand them free information

400 survey - Q29: Do you feel it is expensive to access the Wikipedia site on your mobile phone? Rating 1 EXPENSIVE to 5 CHEAP

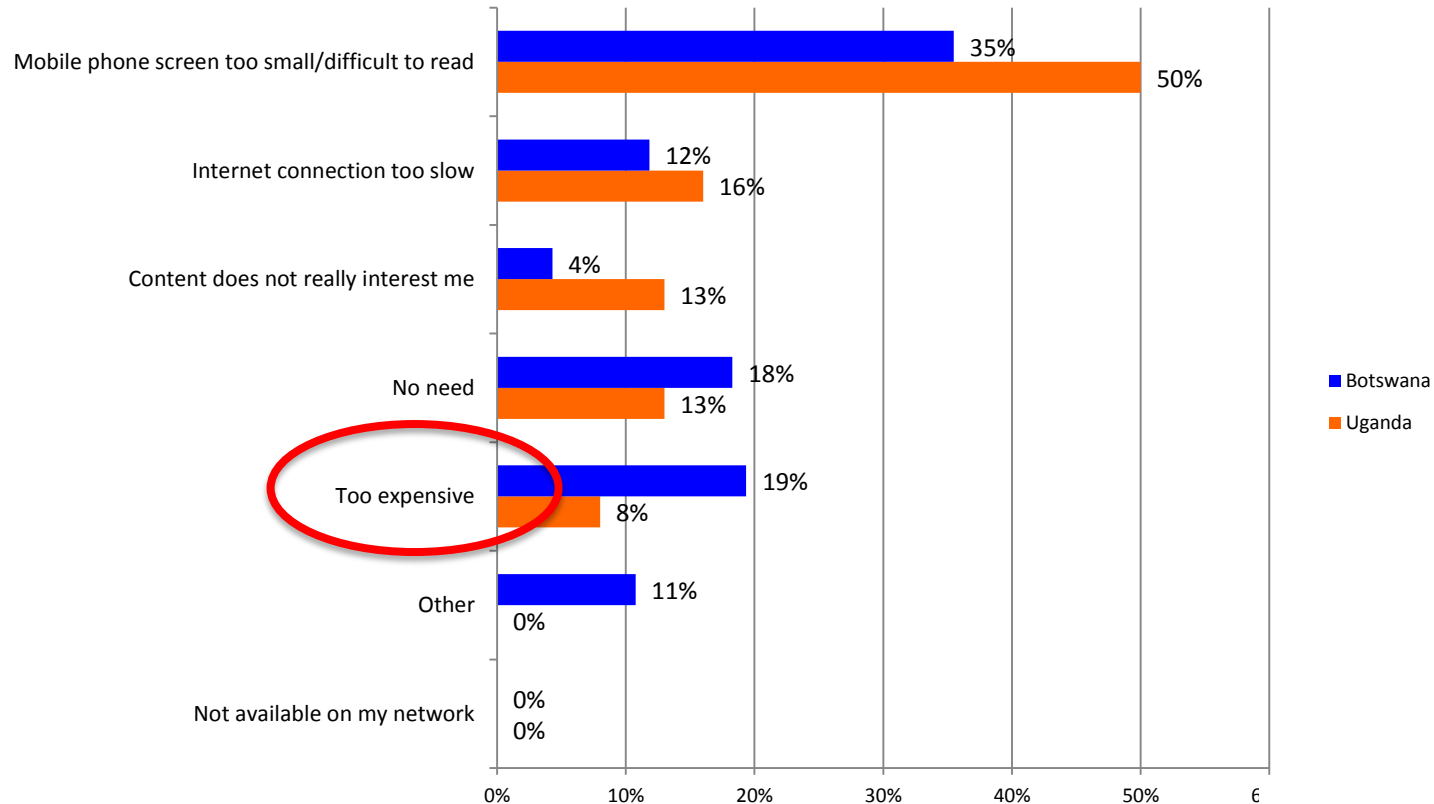


Botswana: 32%

Uganda: 11%

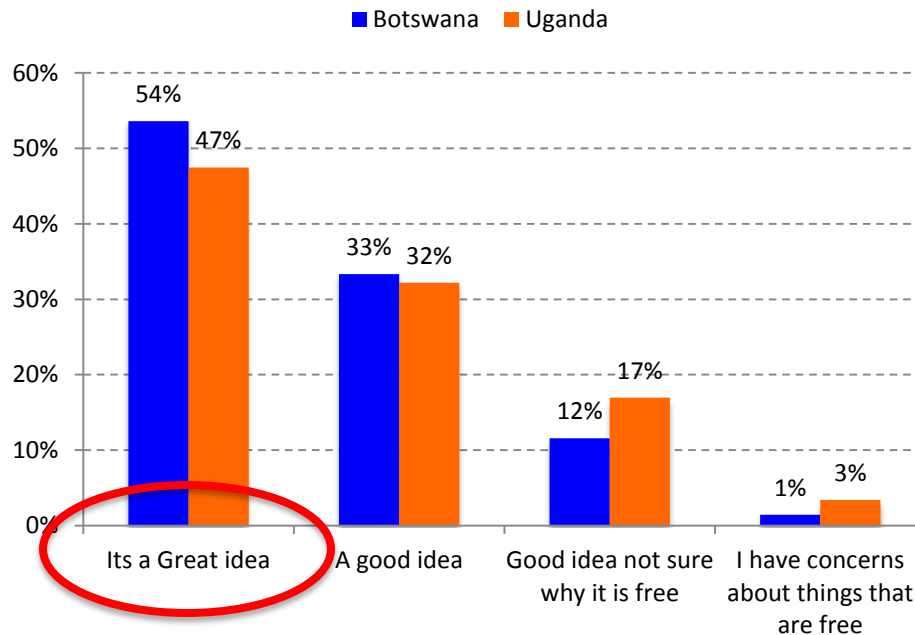
Learning 2: People are not just waiting for someone to hand them free information

Q30: IF ONLY ACCESSING WIKIPEDIA BY DESKTOP: Why don't you access Wikipedia using your mobile phone?



Learning 2: People are not just waiting for someone to hand them free information

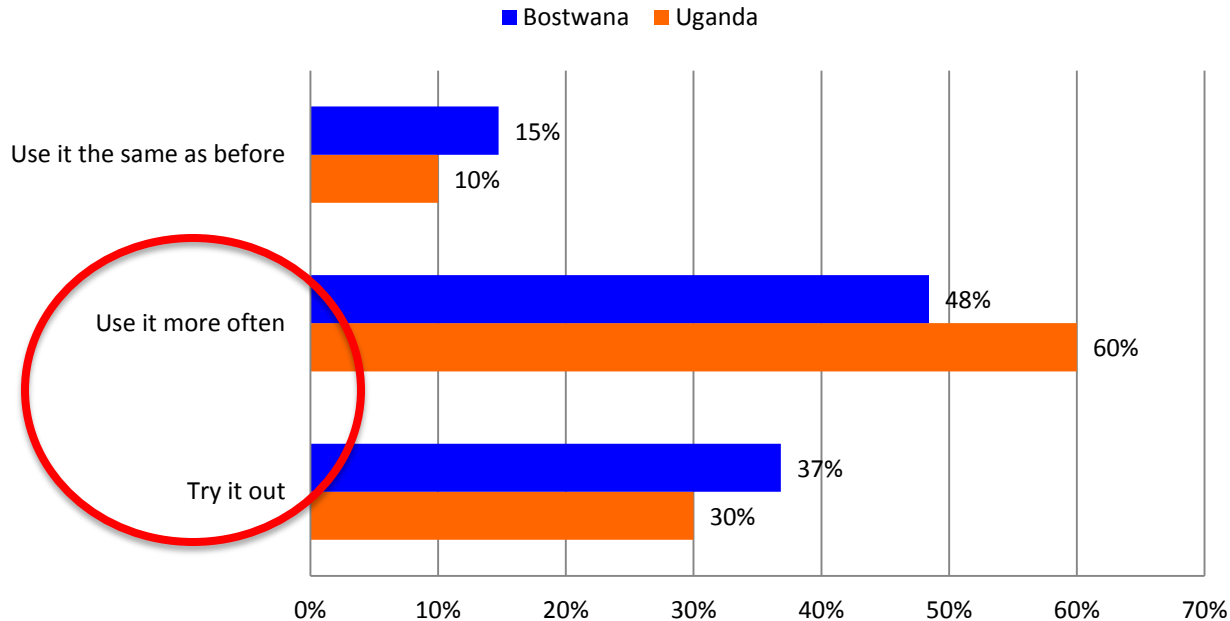
Q33.2. **Additional 100**: What are your feelings about it being free



Learning 2: People are not just waiting for someone to hand them free information

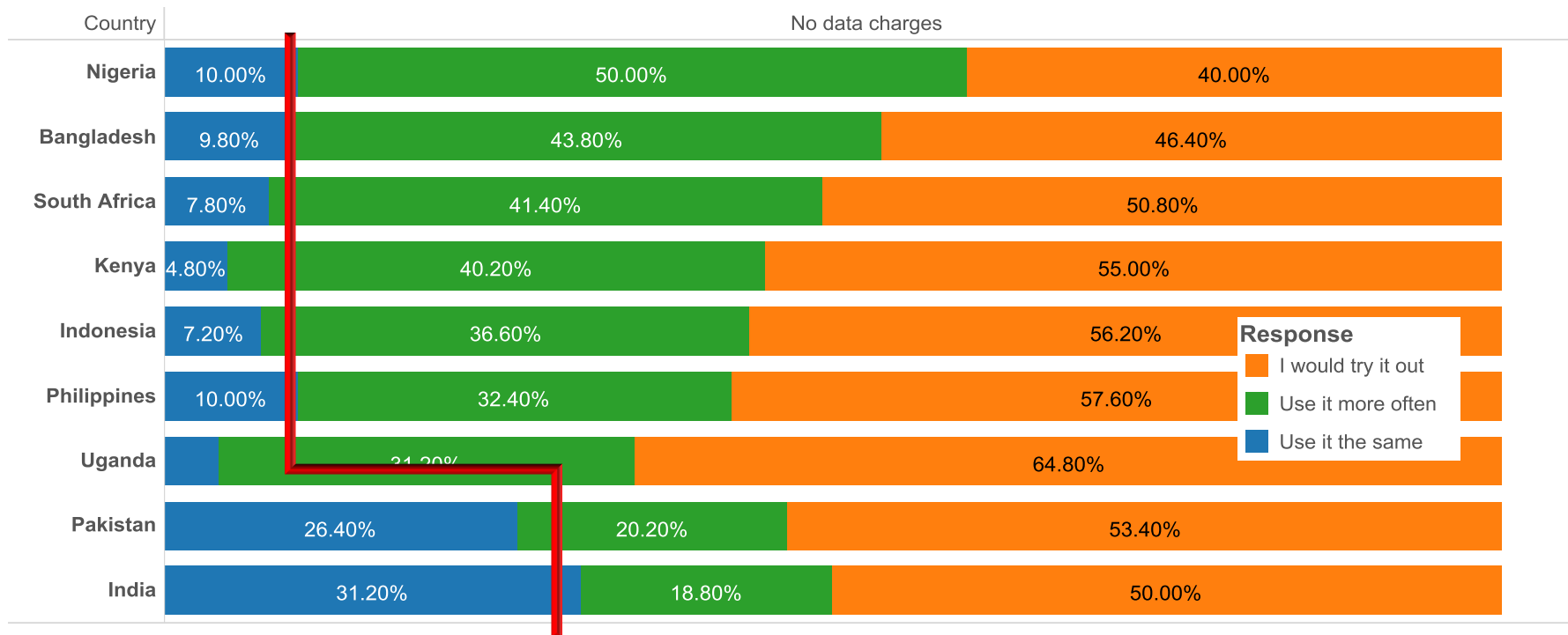
....But they really want to take advantage of it.

400 survey: Q31: NON-ORANGE Subs: If you were able to access Wikipedia on mobile without paying data charges



Learning 2: People are not just waiting for someone to hand them free information

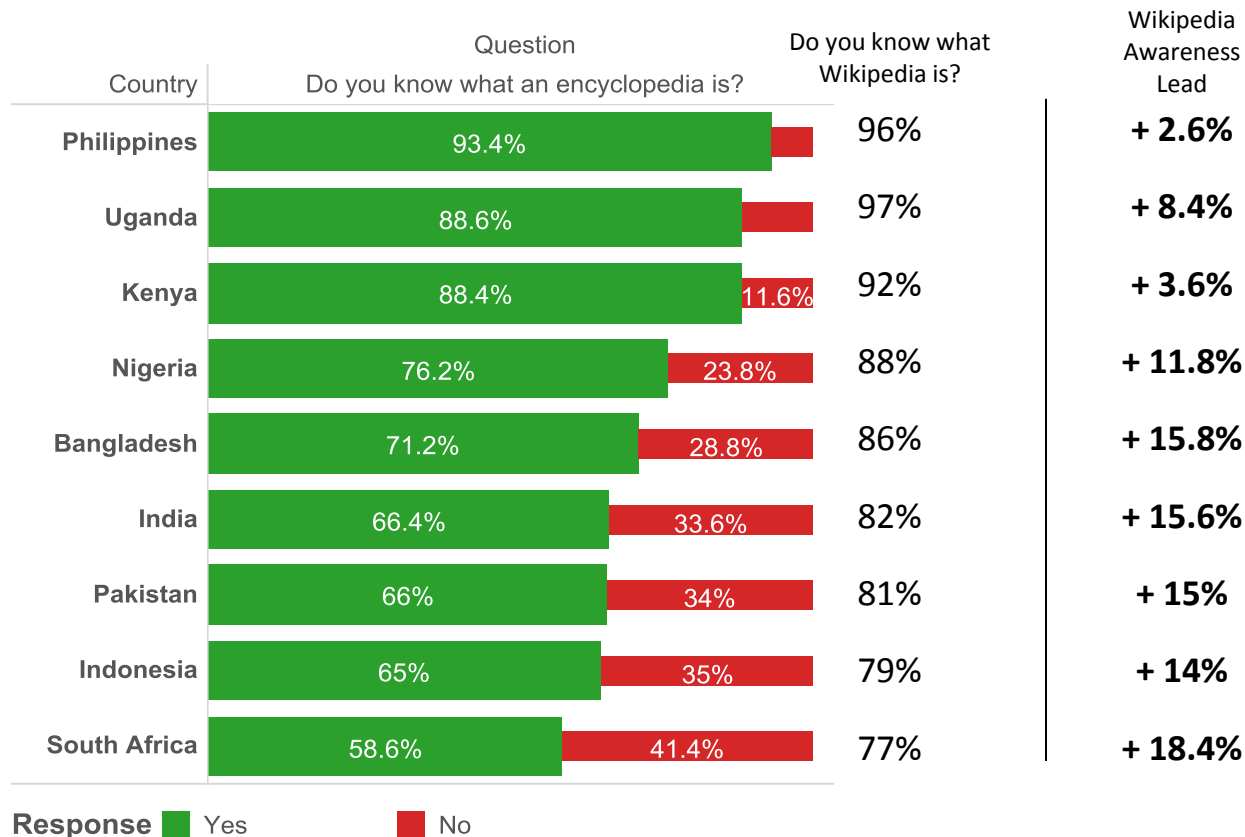
....But they really want to take advantage of it.



Learning 2: Implication

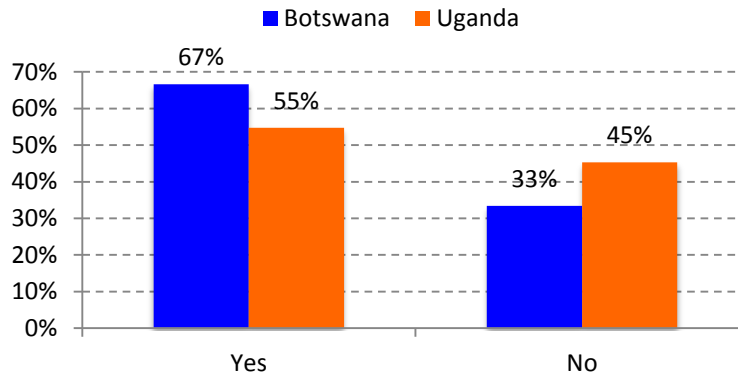
- ✓ The benefit of “free” is not as a handout. The statement, though, is very compelling for people to try!
- ✓ “If you build it, they will come” does not apply as much as “If you tell them, they will come.”
- ✓ We have a “sweet spot.” In addition to people with less money, developing countries with constrained market forces (i.e., less competition = higher prices) inhibit even semi-developed users from trying. Similarly, seemingly poor countries may not worry about cost if its cheap.

Learning 3: Wikipedia Awareness is Greater than Encyclopedia Awareness



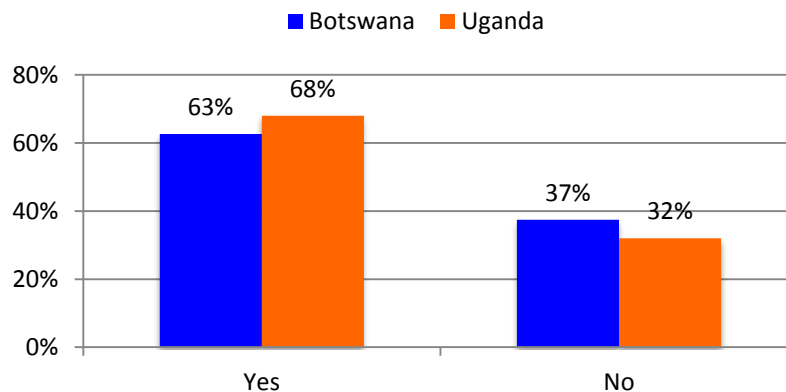
Learning 3: Wikipedia Awareness is Greater than Encyclopedia Awareness

Q18. Do you know what an encyclopedia is?

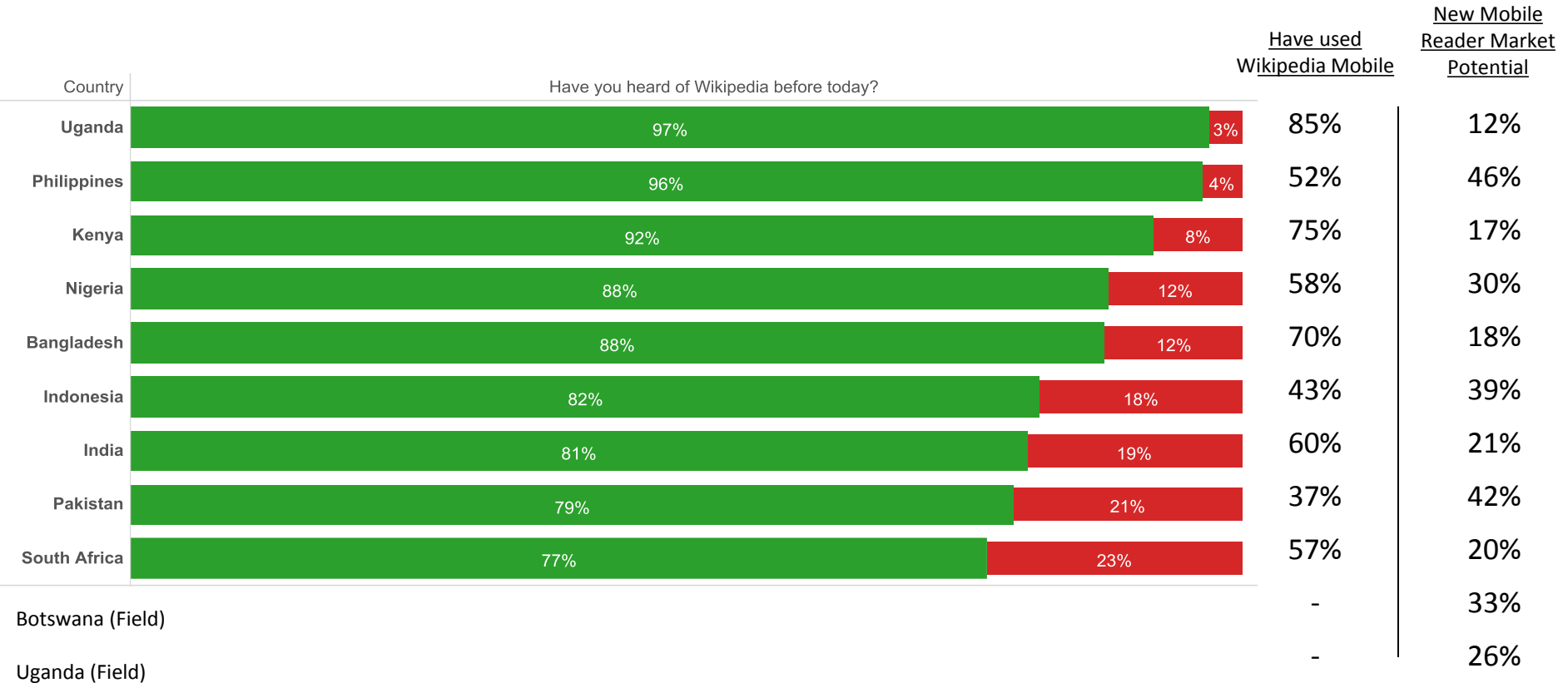


Wikipedia Awareness Lead:
Botswana -4%
Uganda +13%

Table: Q20. Have you heard of Wikipedia?



Learning 3: Wikipedia Awareness is Greater than Encyclopedia Awareness



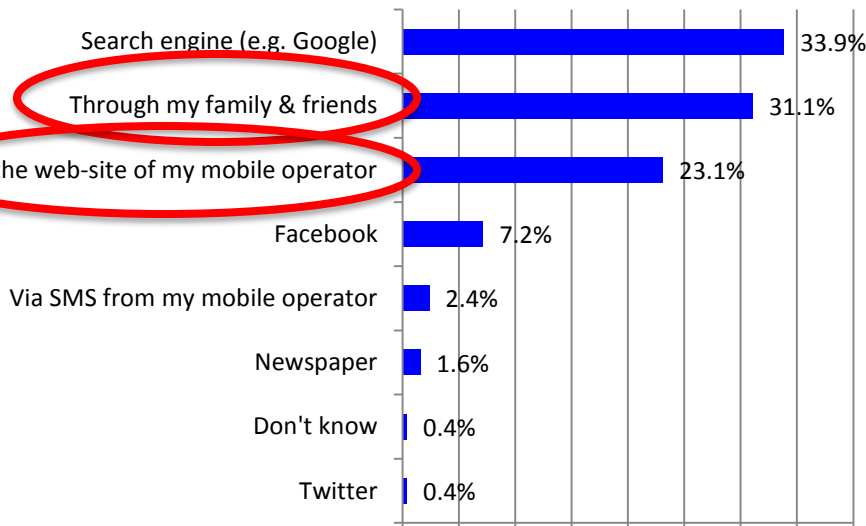
“Market Potential” = % Have heard of - % Have used

Learning 3: Implication

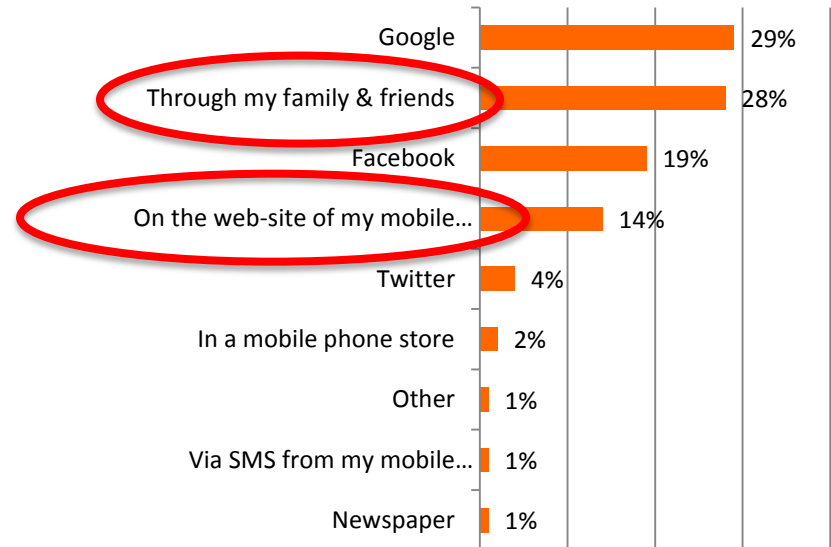
- ✓ We don't have to be a “newer form” of Encyclopedia to much of the developing world. In fact, Wikipedia is a more familiar concept for much of the generation.
- ✓ There is a gap – significant, but not huge – of around 15-40% who have heard of Wikipedia, but don't use it on mobile (despite using other internet on mobile)
- ✓ Can stretch to simplify the world of developing country internet users in thirds: 1/3 don't know Wikipedia at all, 1/3 heard of it but don't use it, 1/3 use it

Learning 4: Influence is still largely analog

Botswana Q21: How did you FIRST find out about Wikipedia?



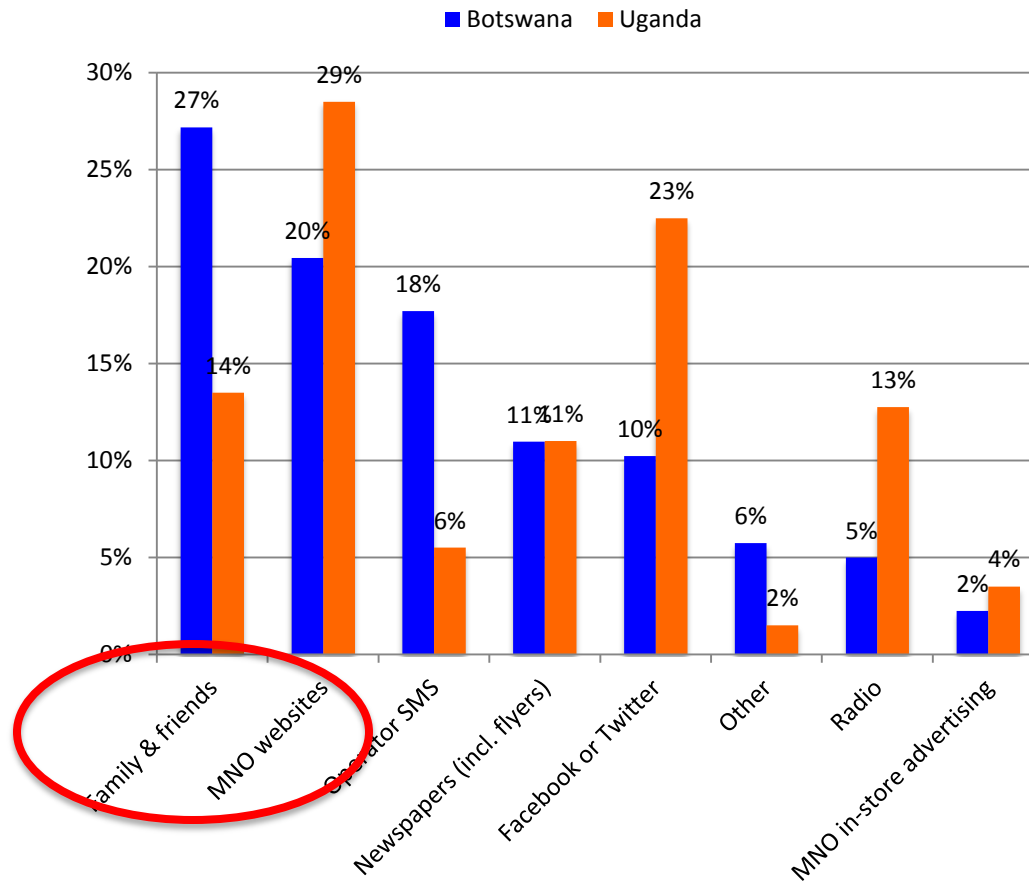
Uganda Q21: How did you first find out about Wikipedia?



....And operator marketing works too.

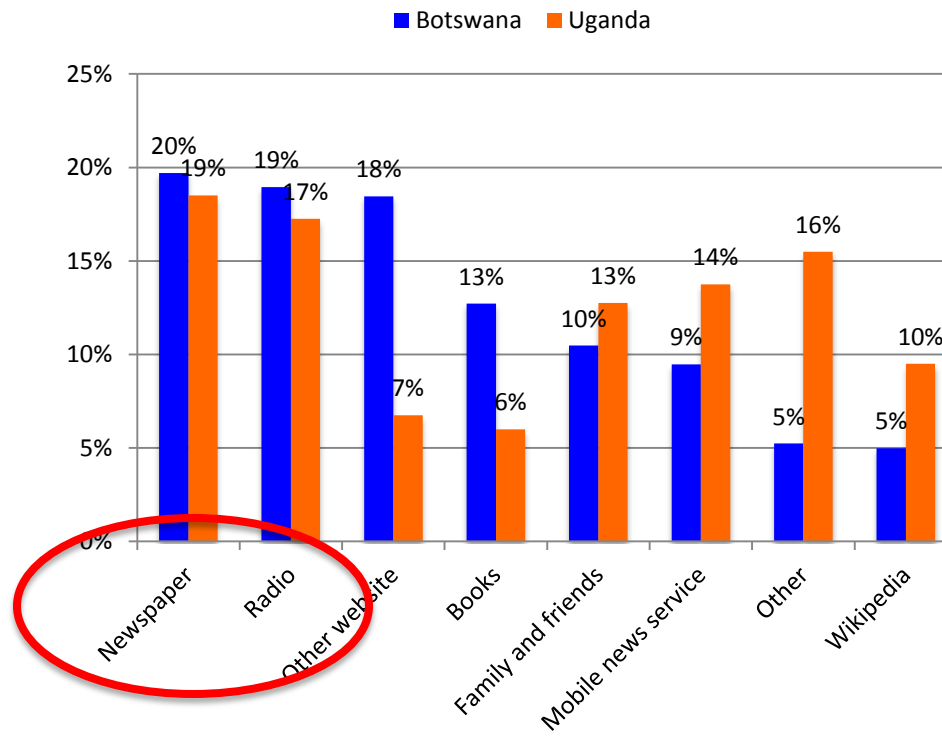
Learning 4: Influence is still largely analog

Q10: What is the MAIN way that you find out about new features / services / applications on your phone?



Learning 4: Influence is still largely analog

Q11: What is your preferred source of factual information?

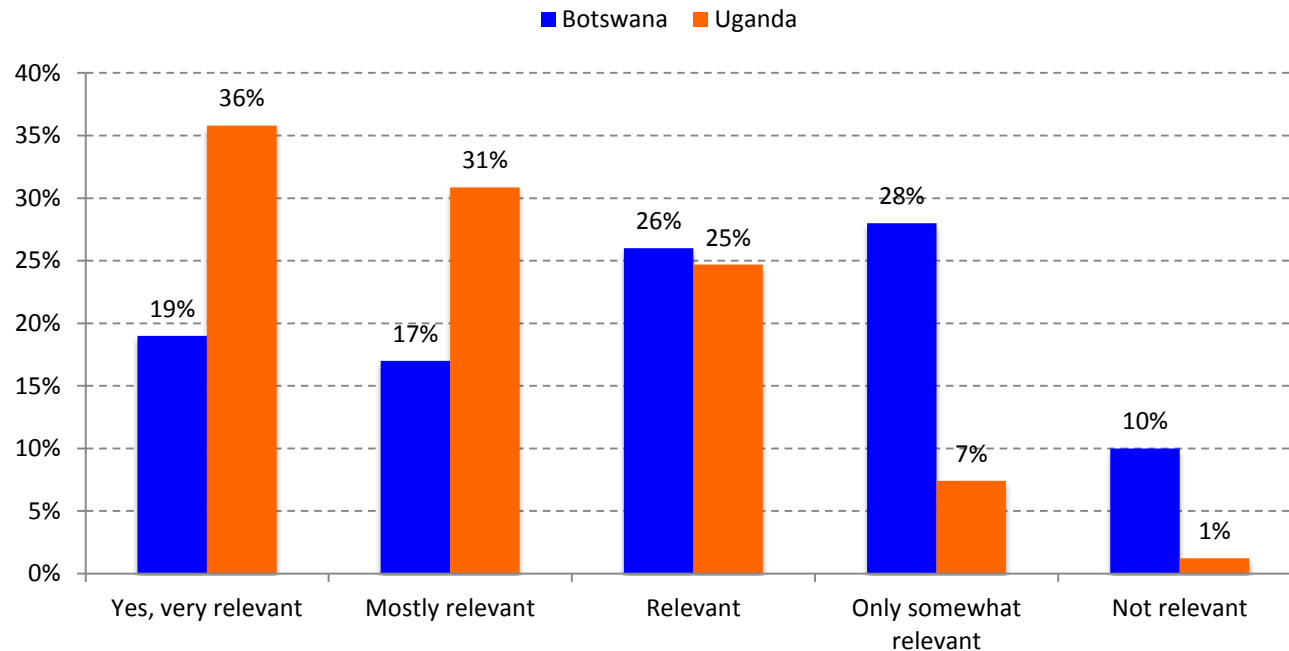


Learning 4: Implication

- ✓ Google may drive the search behavior, but the influence of family and friends is prevalent in learning about the site – case for 1:1 “kits”
- ✓ Operators are influential, as we know, but so is Facebook. We can’t ignore its potential for peers to get others to try Wikipedia, and should be more encouraging of operators to use it (e.g. Aircel Twitter campaign).
- ✓ Newspaper and radio (not other websites) are still what people think of when they think of facts. Important not just for partner advertising, but also what we need to compare Wikipedia to somewhat.

Learning 5: Perceived local relevance of Wikipedia can be low

Q23. **Additional 100**: Do you think that Wikipedia has information that is relevant to Botswana / Uganda?



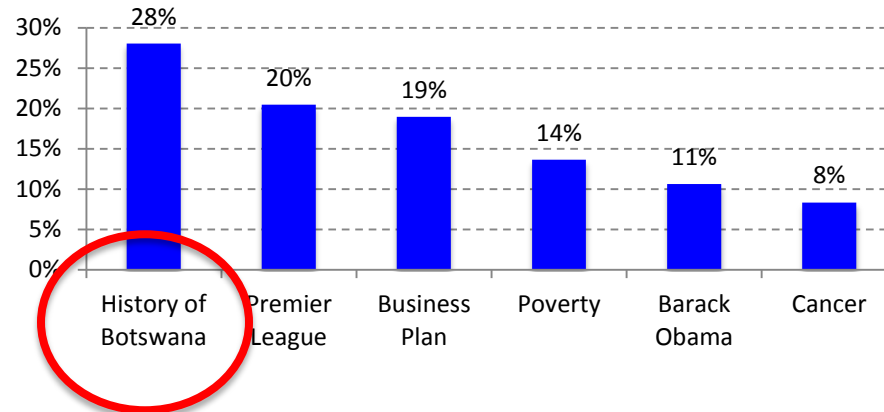
Learning 5: Perceived local relevance of Wikipedia can be low

400 Survey [Q24b] Reason for not using Wikipedia in %	Uganda
I have not thought about its importance, not given it any attention	44%
I don't know how it works	29%
I can get the information elsewhere e.g., from Google, Yahoo etc.	14%
Does not have the content I would like to read	8%
Its not considered a credible source i.e. I don't know the source of the info	5%

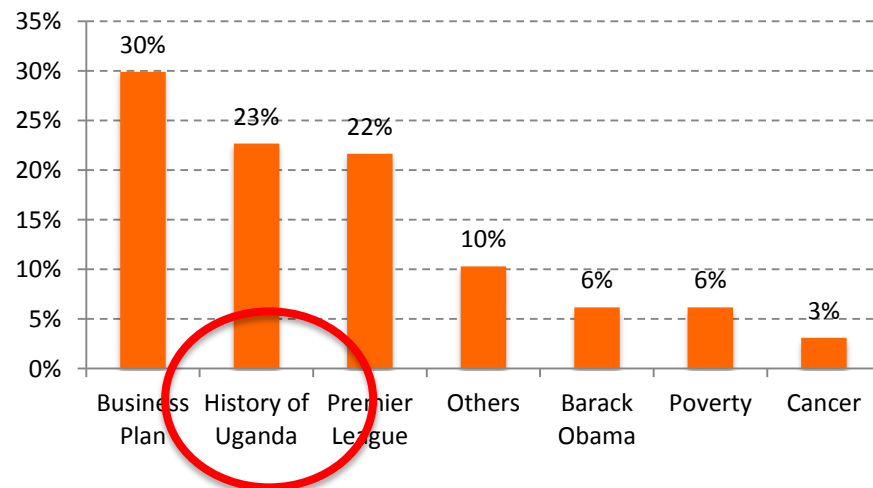
[Q24b] Reason for not using Wikipedia in %	Botswana
Do not find it useful	30%
Didn't know about it	22%
Never tried it	11%
No time to access it	9%
It's not reliable because anyone can edit it	7%
Don't trust it	4%
No reason	4%
As students we are discouraged to use it for research	2%
Because it's a small country and there's nothing to say about it.	2%
Because what I'm using in the internet is okay with me.	2%
I only use the net for social network mostly.	2%
No need and I think it is expensive.	2%
Not really good with internet.	2%

Learning 5: Perceived local relevance of Wikipedia can be low

Botswana Q34: **Additional 100**: Of the following, which Wikipedia article might interest you most to read



Uganda Q34: **Additional 100**: Of the following, which Wikipedia article might interest you most to read

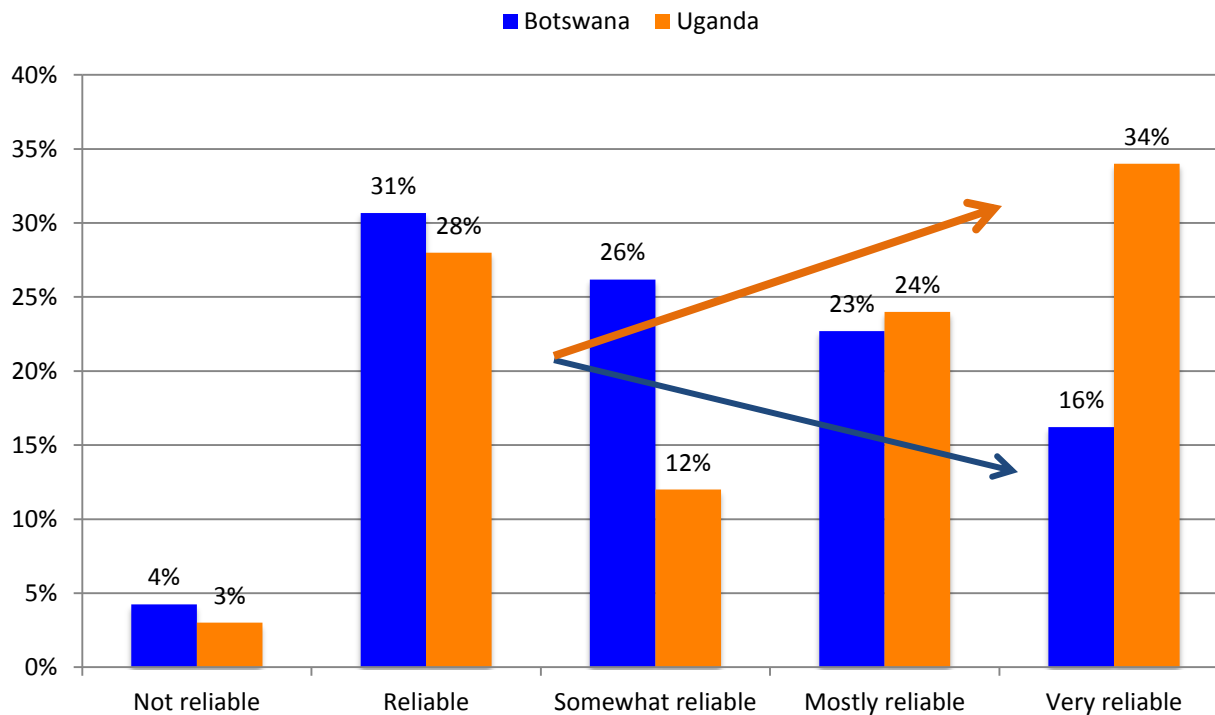


Learning 5: Implication

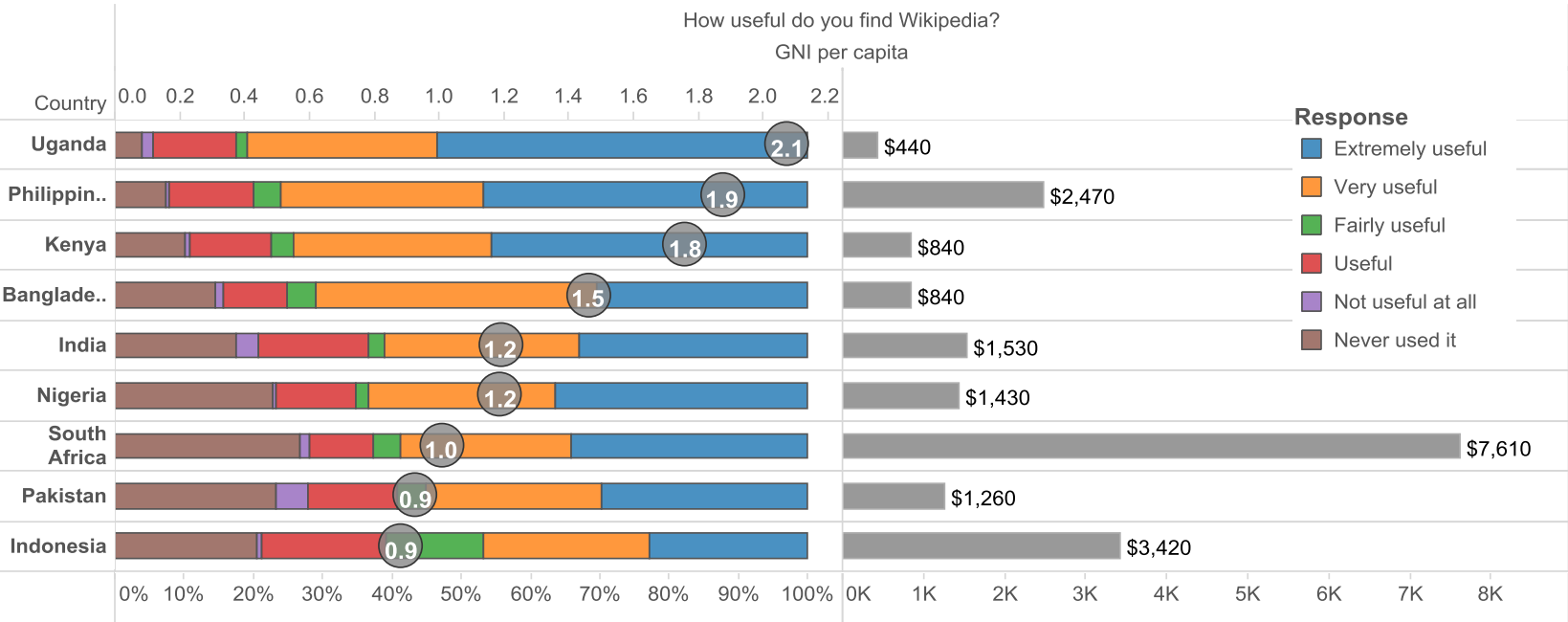
- ✓ Content on local topics can be somewhat untrumpeted, but when potential readers know about it, they show a lot of interest. (also Focus Group story)
- ✓ Case in point to pilot a specialized landing page for a country. Not language-based, but geo and WikiProject based.
- ✓ Operators, especially in smaller countries like Botswana (and Niger, Sri Lanka, etc) need to advertise the prevalence of local content as well, ie WikiProject tags

Learning 6: With more developed infrastructure comes a bias *against* internet credibility

Q12: Do you think information found on the internet is reliable?



Learning 6: With more developed infrastructure comes a bias *against* internet credibility



Usefulness



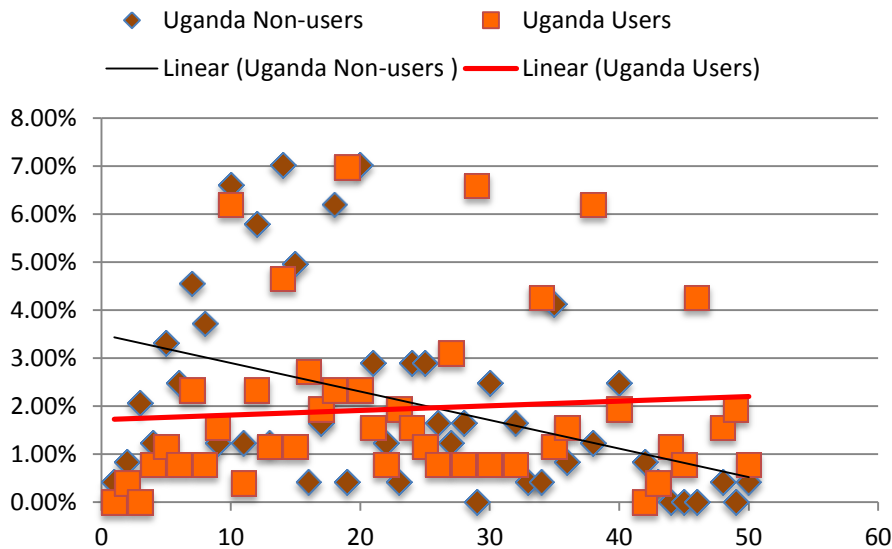
Income



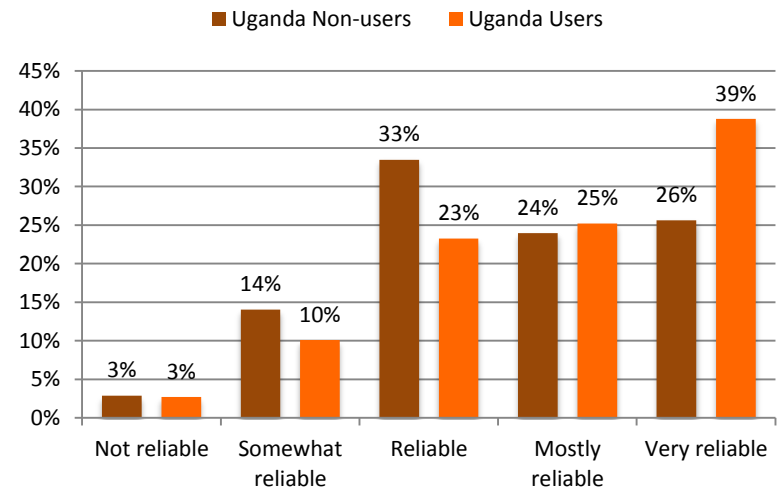
Learning 6: With more developed infrastructure comes a bias *against* internet credibility

But Wikipedia users spend more time on the internet, which increases faith in the internet

How many hours in total have you spent on the Internet in the last week approximately?



Q12. Do you think information found on the Internet is reliable



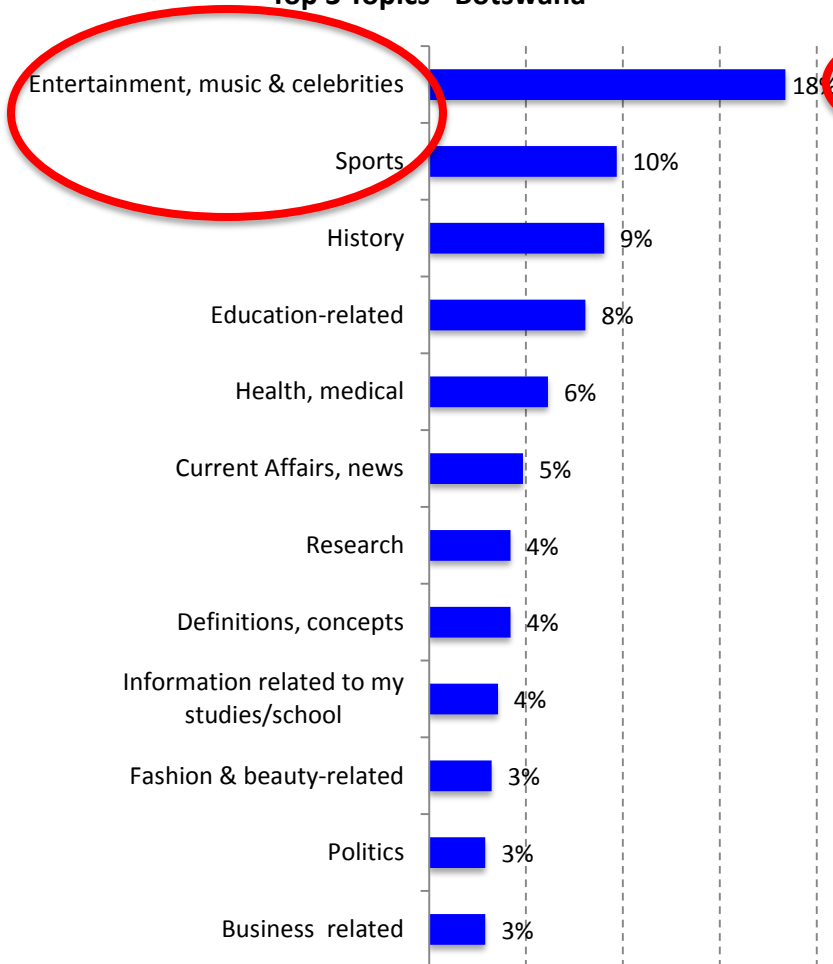
Learning 6: Implication

- ✓ An internet reliability bias can affect usage/belief in Wikipedia, which is more pronounced in slightly-more developed emerging countries
- ✓ The influence of educators is huge – we should also market *to* them for WP Zero
- ✓ We have the most utility to the poorest of countries (given infrastructure), but this is also where data fees are not as huge of a barrier – Wikipedia can build up faith in these mid-markets (South Africa, Botswana, Indonesia, Nigeria)
- ✓ Operators in these countries need to extoll the reliability, along with the local content – Increased reliability/usage in the internet can also be a huge selling point to them (ie, more long-term business)

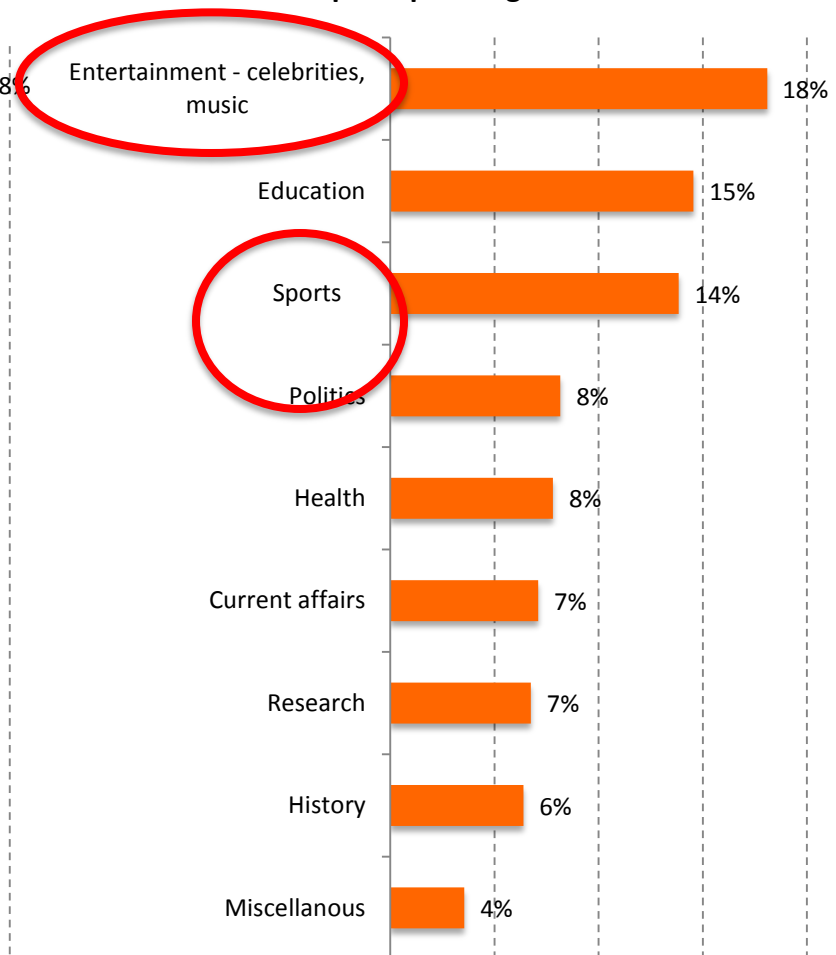
Learning 7: What people say they want to read and what they actually do is vastly different

Key search topics of mobile Wikipedia users (Q34)

Top 3 Topics - Botswana

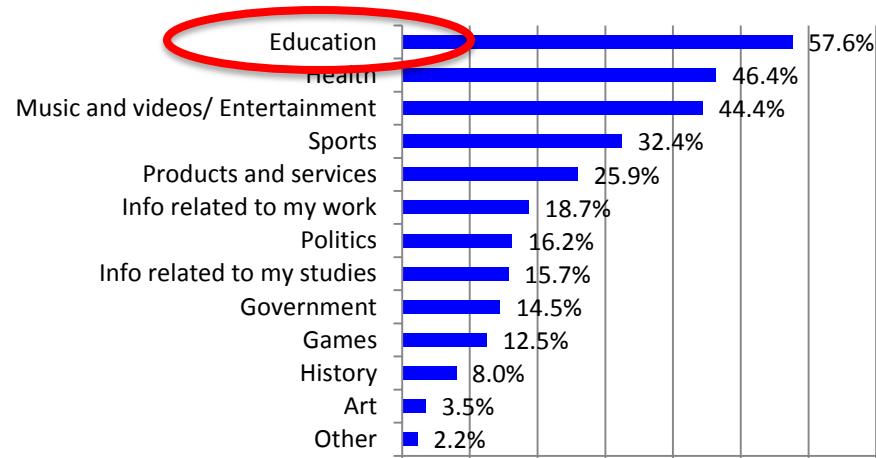


Top 3 Topics - Uganda

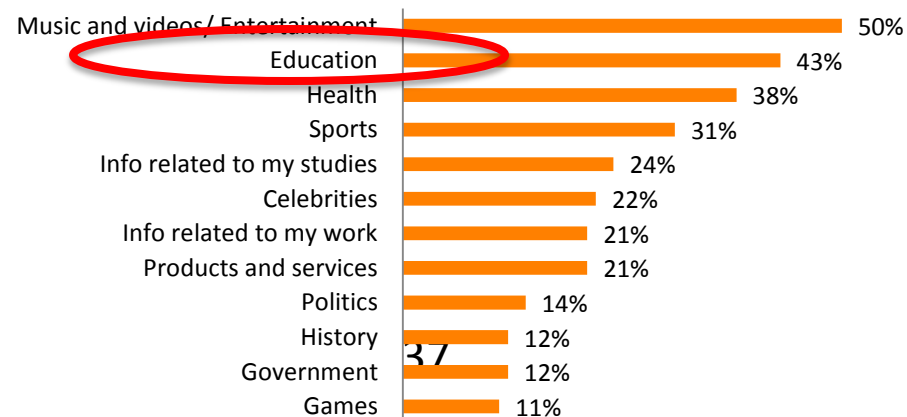


Learning 7: What people say they want to read and what they actually do is vastly different

Botswana: Q15. What type of information are you most interested in?



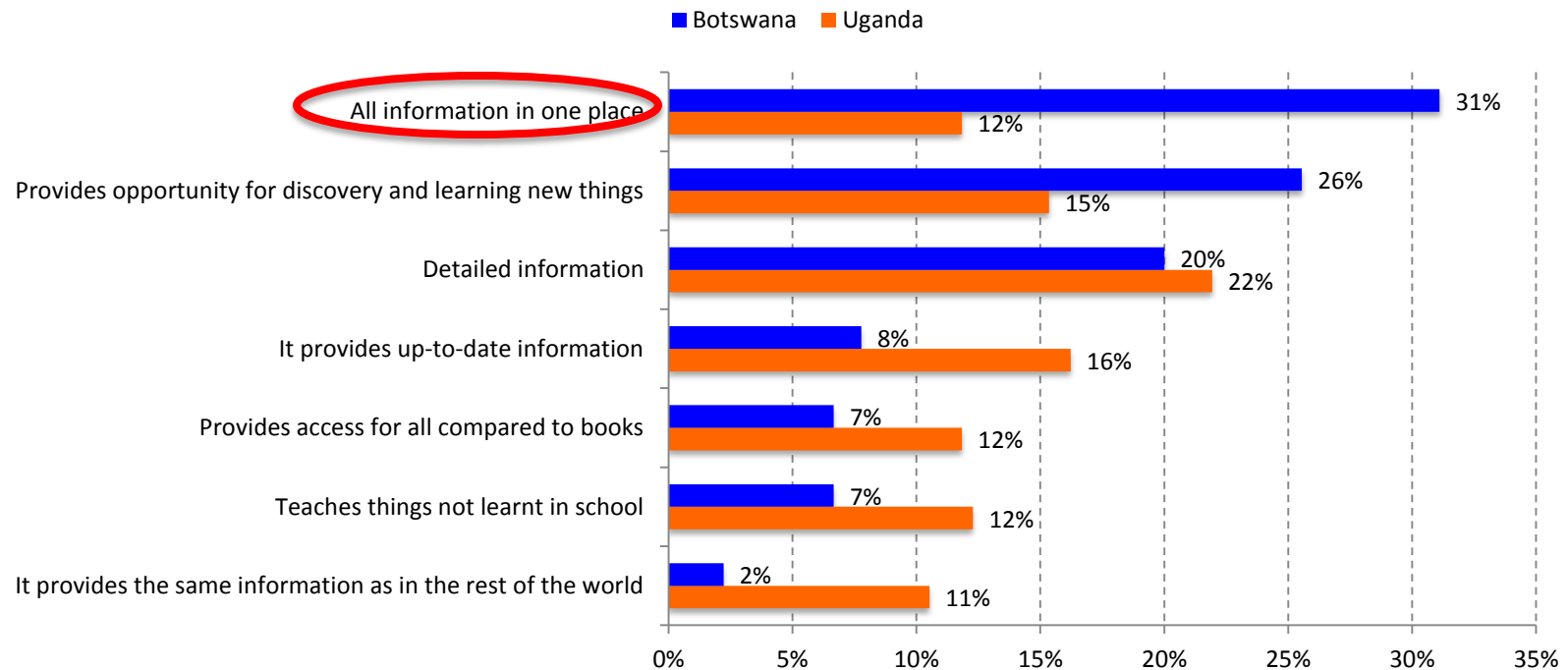
Uganda: Q15. What type of information are you most interested in?



Learning 7: What people say they want to read and what they actually do is vastly different

Having it all in one place matters

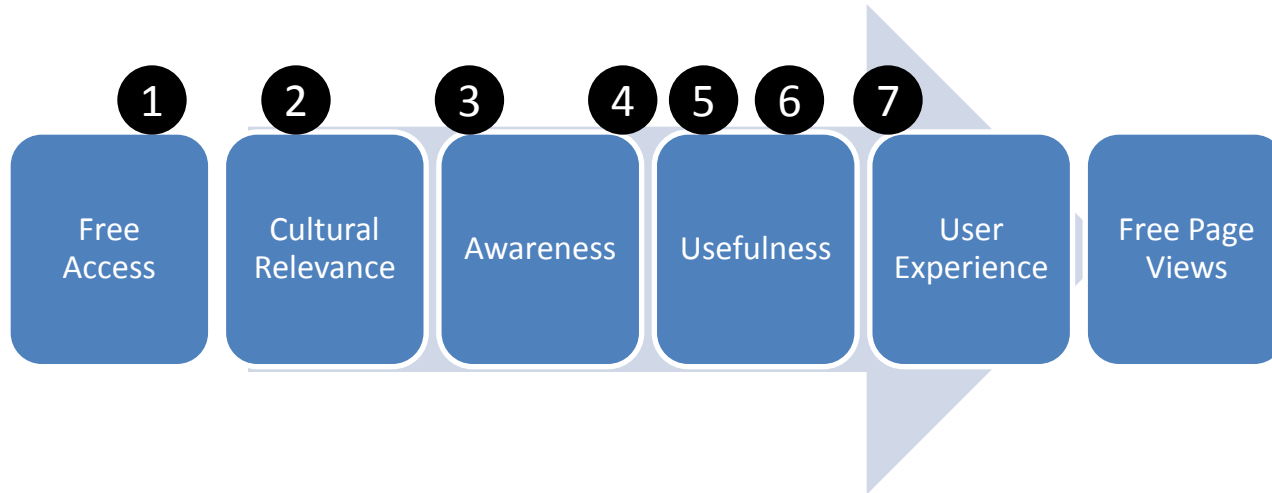
Q19: **Additional 100**: Benefits of an online encyclopedia



Learning 7: Implication

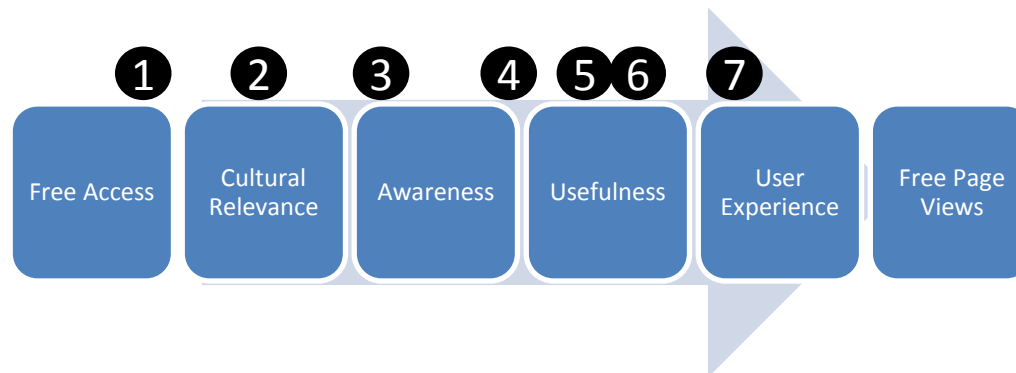
- ✓ Wikipedia's appeal to many is currently largely in pop culture, but people care about more – they just don't fully see that potential
- ✓ Pop culture can be a gateway to more educational topics – we shouldn't discount that in allowing operators to market the pop culture (remember, most aren't just waiting for more information)
- ✓ Having of this in one place (i.e. pop culture plus more academic topics) is a huge deal that we don't advertise directly enough. Need the operator's marketing to seize this opportunity.

7 Key Learnings



Learning Summary

1. Half of the people that use Wikipedia free don't even know it's free
2. People are not just waiting for someone to hand them free information
3. Wikipedia awareness is greater than Encyclopedia awareness
4. Influence is still largely analog.
5. Perceived *local* relevance of Wikipedia can be low
6. With more developed infrastructure comes a bias *against* internet credibility
7. What people say they want to read and what they actually do is vastly different



Takeaways and Next Steps

- ✓ There is a market to address – those that are aware but not using, and, more easily, those that don't even know its free
- ✓ Influence the way its positioned via partner marketing – **local, reliable, all in one place**
- ✓ Seize the peer-to-peer opportunity
- ✓ Pilot a one-country local content landing page (based on WikiProject)

Additional resources on the research:

- Focus group videos (12 hours worth) and data sets
- Full original report from Intelecon
- Visualization dashboard of Jana data

Thank You!

WIKIPEDIA | zero