

Brand Health Tracker

Wave 1 | Communications | July 2022



WIKIMEDIA
FOUNDATION



Wikimedia Brand Health Tracker: Wave 1

Communications Department
Worldwide

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- 2. Methodology**
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- 8. Next steps**

“Are we still relevant compared to so many other online platforms? Why would people come to us? How easy is our technology to use?” When I probed further, I heard:

“On some very emotive issues, we have no baseline data.”

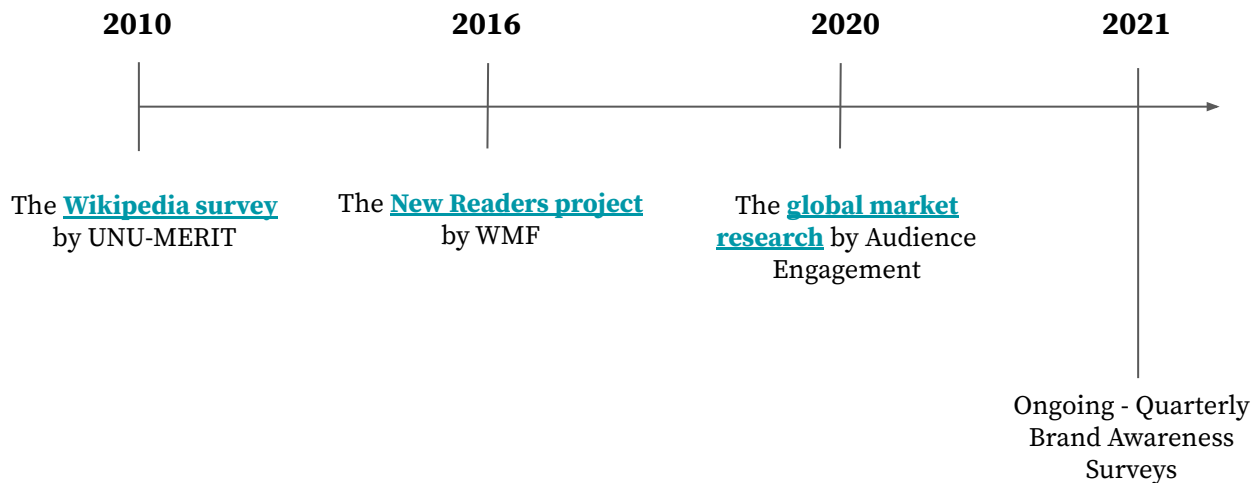
- [Puzzles & Priorities](#)

01

**Brand
Measurement
at Wikimedia**

There has been several attempts to establish general population brand baselines & metrics

One-off investments, regional, or explored product, brand or mission awareness independently or selectively.



More Questions

How do internet users perceive the Wikipedia brand?

Do our current users know what we stand for?

Are they aware of our values and do they resonate with them?

How do we compare in awareness and reception with competing alternatives and beyond?

To what extent are our users invested in the brand and in our mission?

Can we sustainably track these measures over a period of time?

02

Methodology

The science...

A pacesetter baseline study

- A revision of the brand awareness quarterly survey.
- Adopts a more intensive approach, covering top-end brand health metrics, including NPS, brand funnel metrics, and brand attributes and values.

Representative sample frame

- Sample respondents for the survey were purposively selected to reflect the population demography, particularly for age and educational qualifications for selected countries.
- A total of 11,000 respondents (1,000 per country) were used.

Focus markets that tell a global story

Eleven markets were selected based on:

- Focus markets for recent campaigns, partnership and strategic focus.
- Identified growth opportunities based on recent market research
- Surveyed markets in previous iterations of brand awareness research.

A tool with a global reach

Pollfish, a global survey management tool, was used to collect responses for the global view. Pollfish was useful to ensure:

- Sample quotas are set;
- Different forms of questions were designed
- Responses were validated, as invalid entries are filtered out and replaced with valid ones.
- Flexible and cost efficient.

Markets & Schedule

Baseline Markets

Protect

1. United States
2. Germany
3. South Africa
4. Philippines

Create

1. Brazil
2. Mexico
3. Russia
4. South Korea

Expand

1. India
2. Nigeria

Build

1. Indonesia

Schedule

Frequency

The tracker will be measured **bi-annually**, targeting **July** (start of the fiscal year) and **January** (start of the new year).

Focus markets

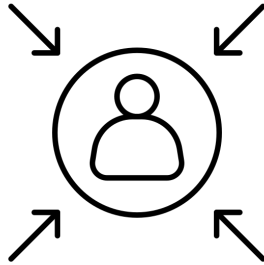
The tracker will cover 12 countries for each iteration, with opportunities to change markets to focus on based on needs and priorities.

A group of Foundation leaders published relevant trends that impact the information ecosystem

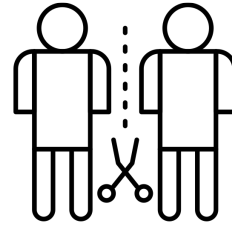
Captured on [Metawiki](#) for the movement to discuss, these trends helped to contextualise and explain some of the data from the brand tracker.



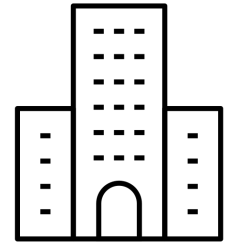
Search has fundamentally changed.



The content war is on



Disinformation and misinformation are on the rise.



Government regulation of internet platforms is around the corner.

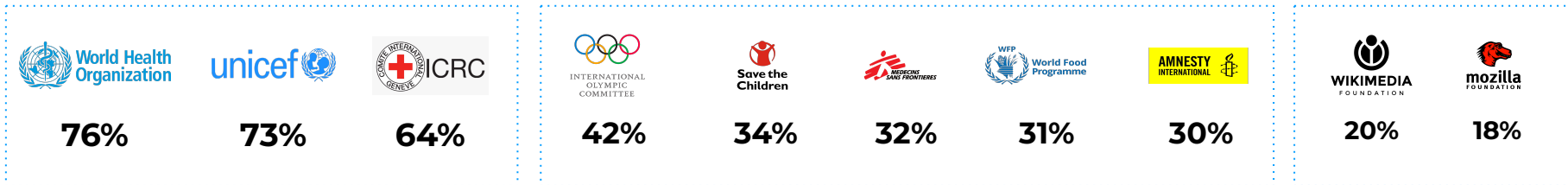
05

**Wikimedia
Foundation
Brand Health**

Our awareness is low when compared to other global social good organisations

Brand awareness for Wikimedia Foundation and other non-profits

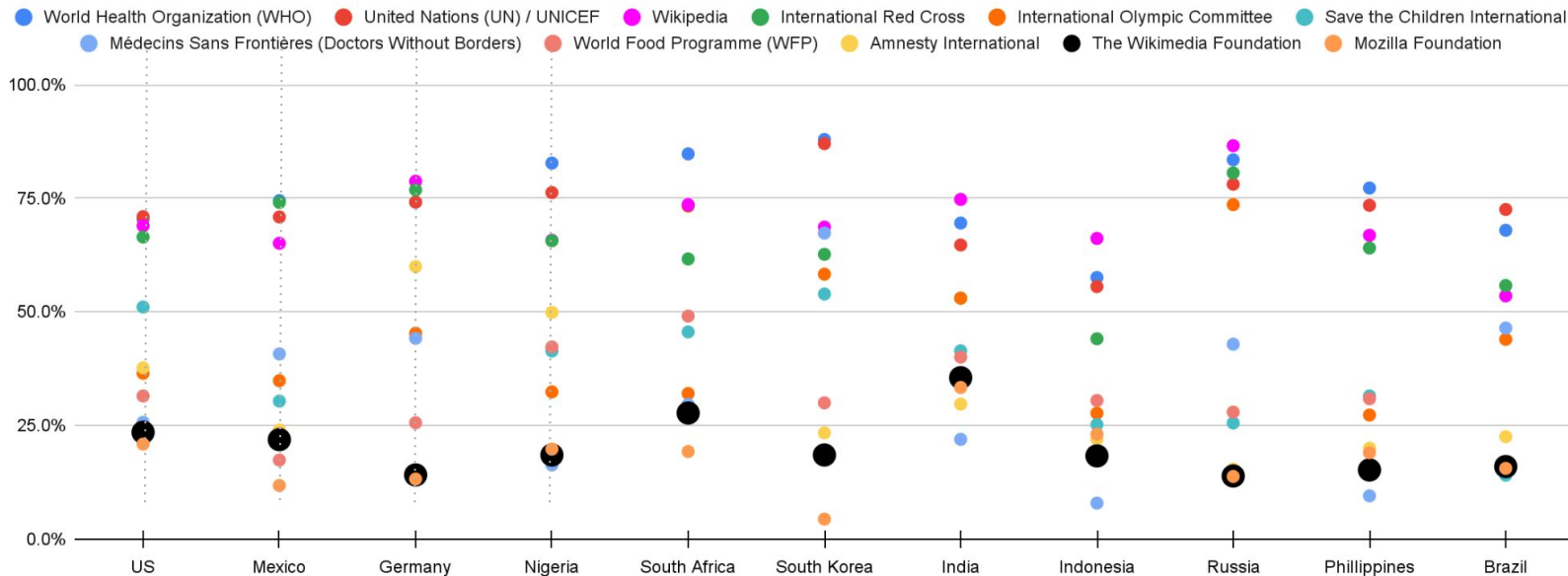
Aided brand awareness (%) for Wikimedia Foundation and other non-profits



India, SA & the US have the highest awareness with Brazil, Indonesia, Nigeria, Philippines, South Korea, Russia & Germany scoring below average

Brand awareness for Wikimedia Foundation & other non-profits across surveyed markets

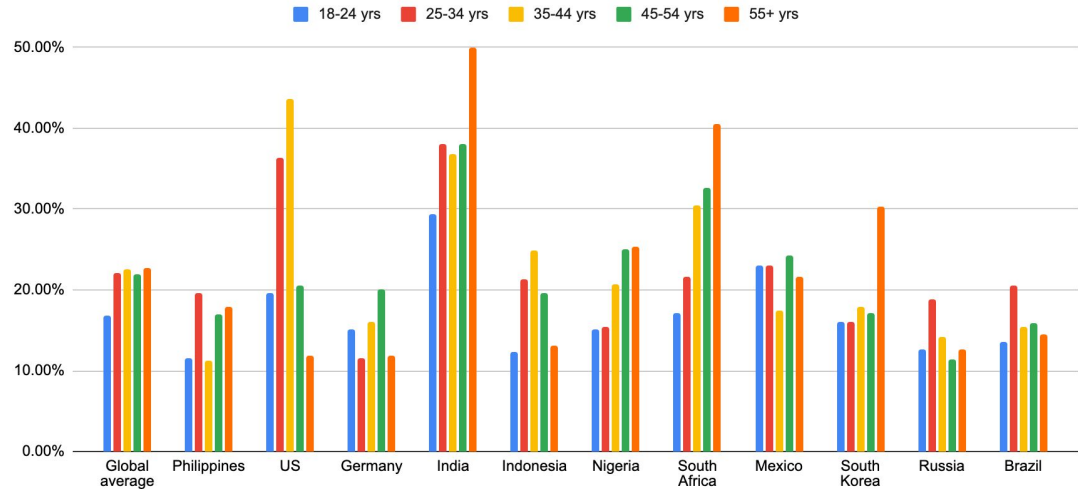
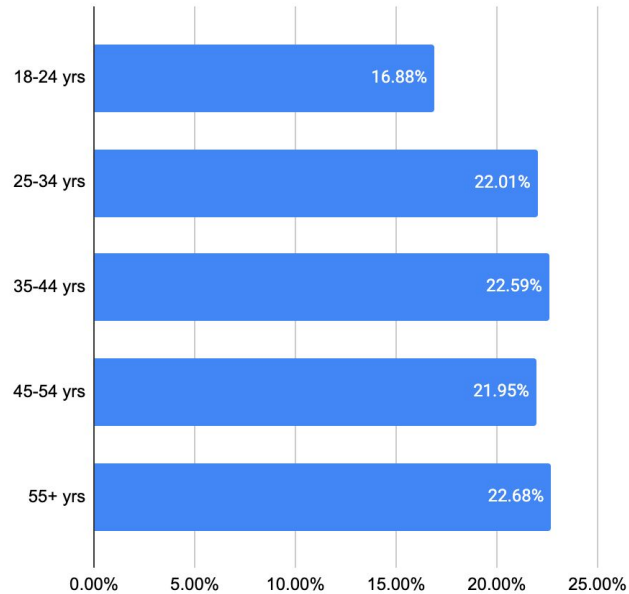
Aided brand awareness (%) for non-profits in surveyed countries



Awareness of Wikimedia Foundation is more pronounced among older populations, particularly in the India, South Africa, and the US.

Brand awareness for Wikimedia Foundation by age groups

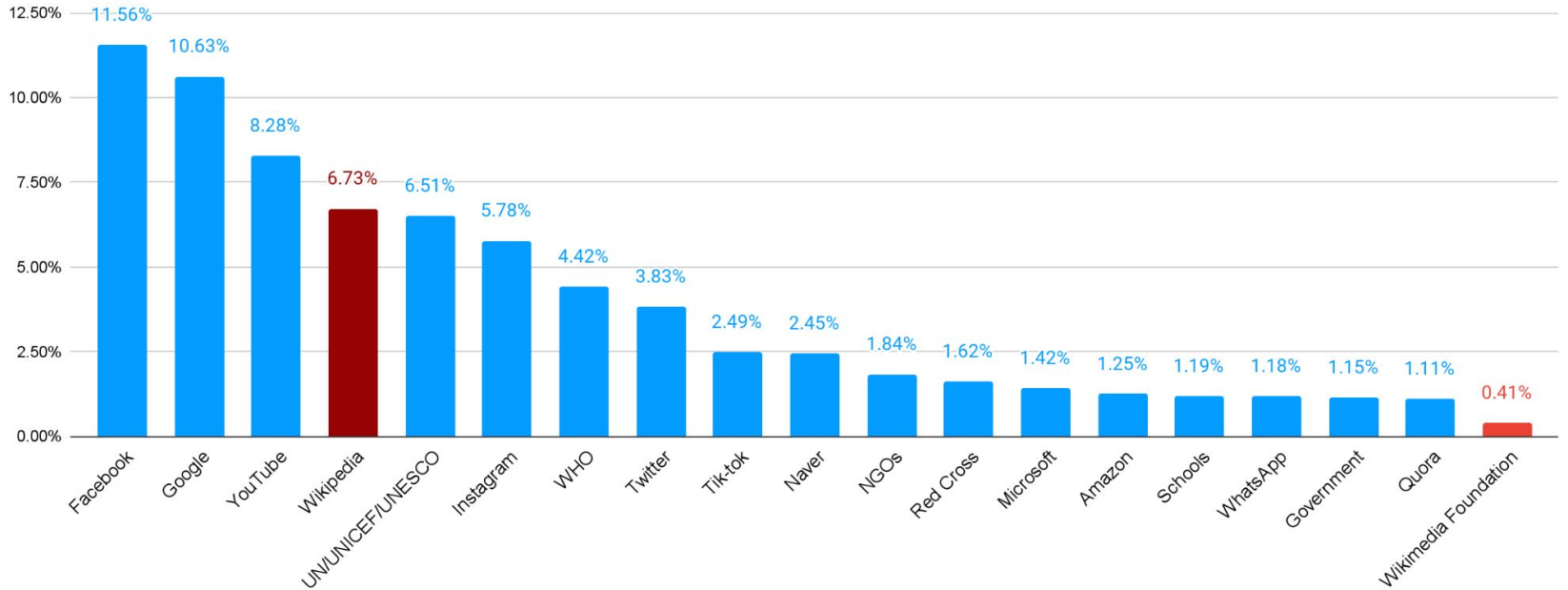
Aided brand awareness for Wikimedia Foundation (%) by age groups of respondents



Wikimedia Foundation is not top-of-mind among organizations that build and share knowledge

Unaided brand awareness for WMF vs competition/category

Unaided brand awareness (%) for Wikimedia Foundation and competing brands as non-profits



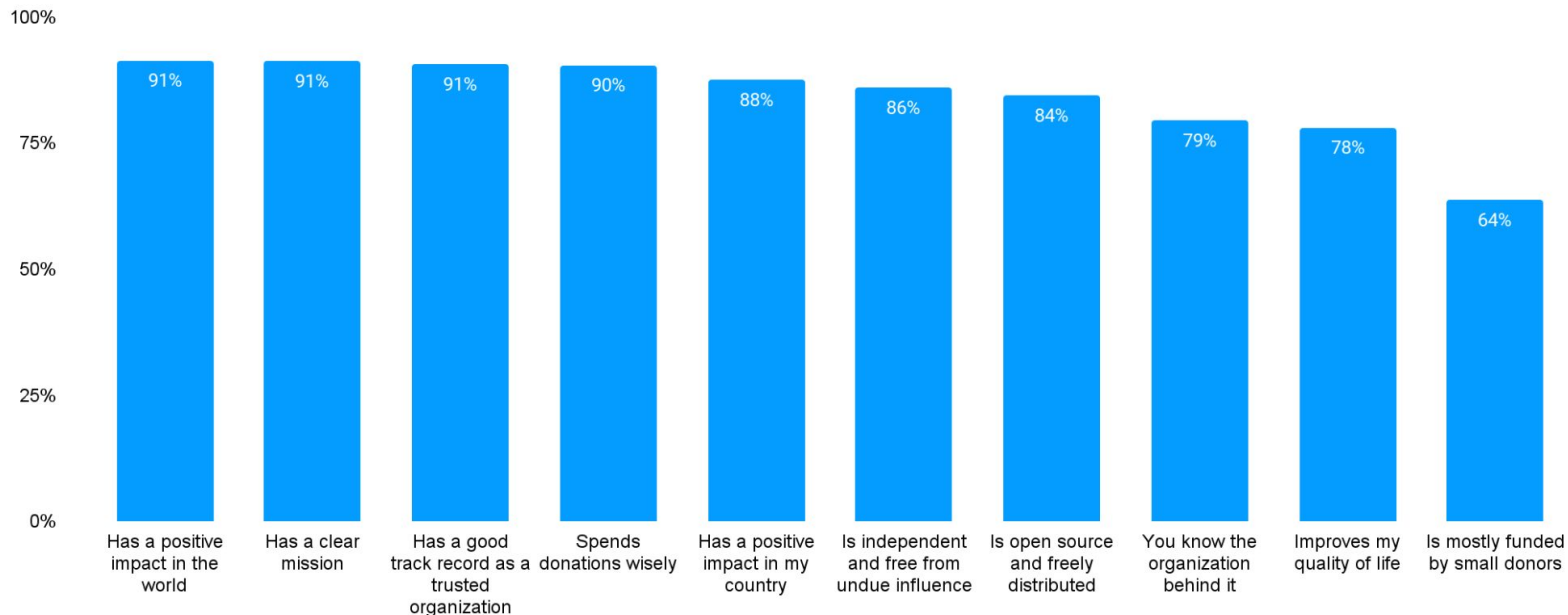
Base: All respondents

Q: There are many organizations that support and support those willing to build and share information and knowledge. Are you familiar with such organizations? Please list up to 3 organizations using commas.

People have extremely high expectations of non-profits but are only partly concerned about how they're funded

Brand attributes ranked as most important for supporting non-profit organizations

Degree of importance of brand attributes for donating and/or supporting non-profits



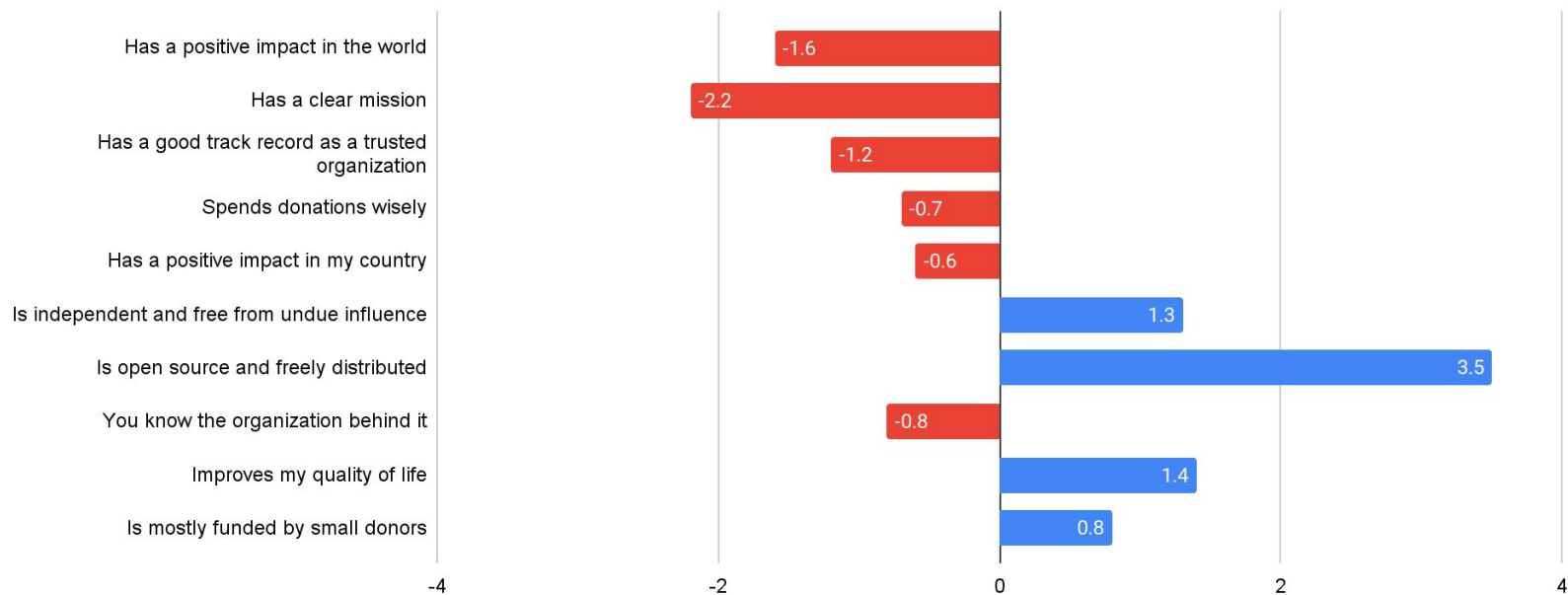
Base: All respondents

Q: How important are each of the following attributes to you when deciding which organizations to support or donate to?

While people associate open source and freely distributed with our brand, it's not clear to them what our mission is

Brand attributes for Wikimedia Foundation - How we fair

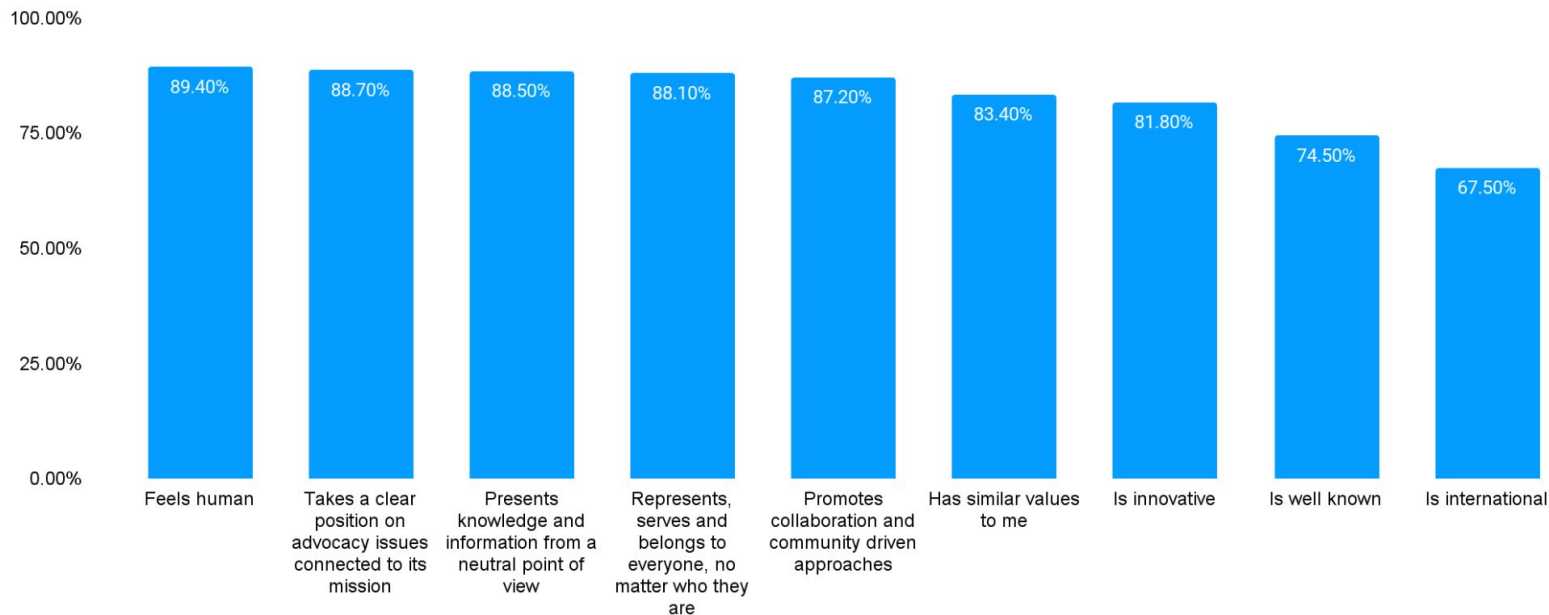
Deviation from category average for Wikimedia Foundation to show how respondents relate attributes to the brand



People are drawn to organisations that express a sense of humanity and take clear stance on key global issues

Importance of brand values for supporting non-profits

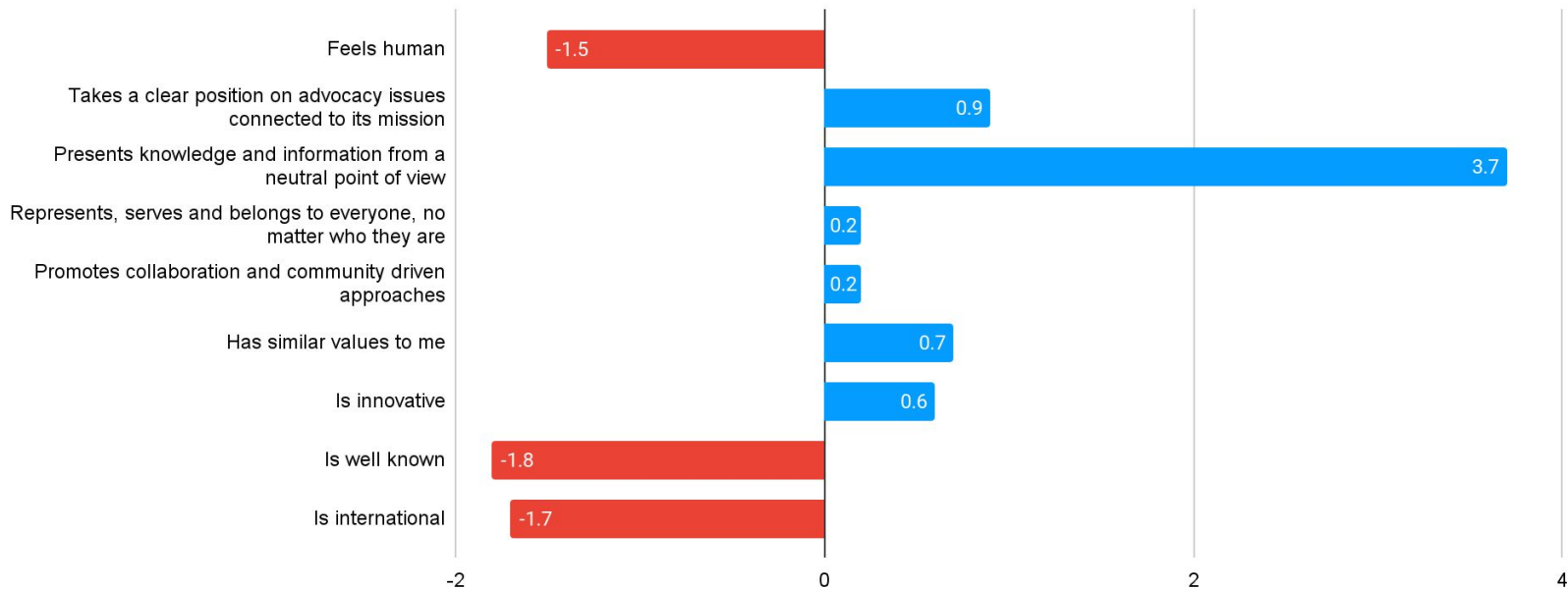
Degree of importance of brand values for donating and/or supporting non-profits



WMF brand performs well on values such as neutrality, mission advocacy but falls short on expressing our humanity

Brand values for Wikimedia Foundation - How we fair

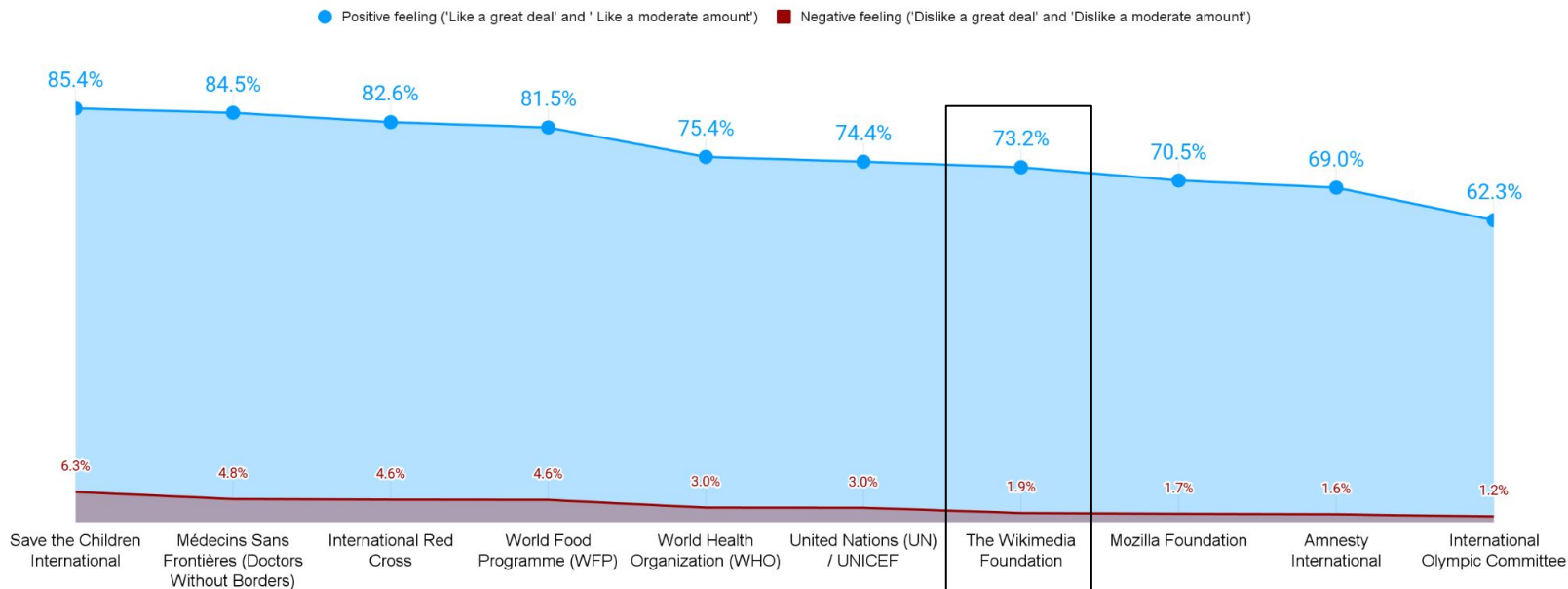
Deviation from category average for Wikimedia Foundation to show how respondents relate values to the brand



Our organisation is well liked, generating positive feelings among those who are aware of The Wikimedia Foundation

Likeability for Wikimedia Foundation vs other non-profits

% respondents who expressed positive vs negative feeling for WMF and other non-profits



There's a varied perception about what the Wikimedia Foundation mission for the future should be: Revolves around neutrality and reliability, knowledge empowerment and social engagement.

*To create more educational empowering content for rural and grassroots communities. - **Nigeria***

*To participate in the development of knowledge in people. - **Brazil***

*Promote the availability of knowledge throughout the world and make it easy to access - **Mexico***

*Helping people understand the history of the world and community - **United States***

*Be very transparent in the information it provides, informing people that there's always two sides to every information available. - **US***

*Provide more knowledge to people and help them learn new things and skills in their life to become successful - **India***

*To be a guide in the swamp of correct, accurate, and vast knowledge to as many people as possible.- **South Korea***

*Create a social media platform where people can engage through like Facebook - **South Africa***

*The content should be better controlled and labeled accordingly - **Germany***

*Protecting natural ecosystems and taking part in maintaining world peace. - **Indonesia***

*Helping students that can't afford to avail premiums or special classes to be knowledgeable - **Philippines***

*Provide honest and informative information, on a large variety of subjects - **United States***

*Without reform, it will increasingly distort encyclopedic knowledge, since the reliability is not verified. - **Russia***

*To empower and engage people around the world to collect and develop content under free license. - **Philippines***

*They have to make some more changes to make it more interesting for students, and to help them in their studies - **India***

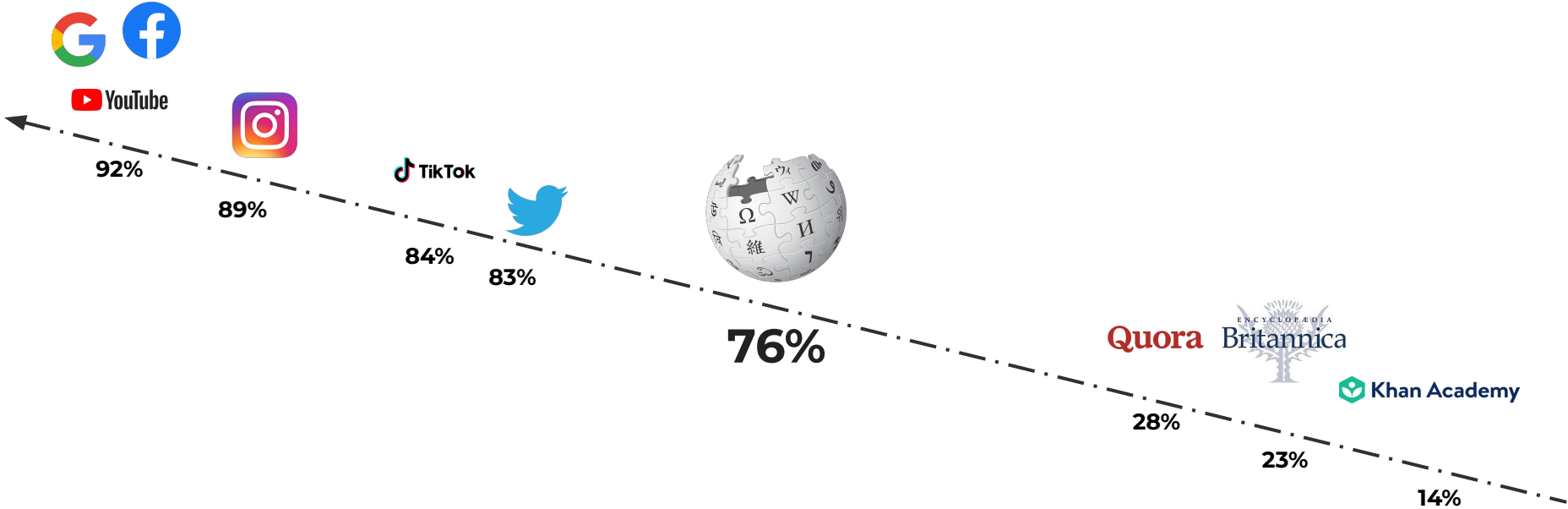
*Clear, trusted, updated. easy to browse, be more competent and stay successful always - **Indonesia***

04

**Wikipedia
Brand Health**

Wikipedia outperforms traditional knowledge content platforms but is outranked by rich media giants

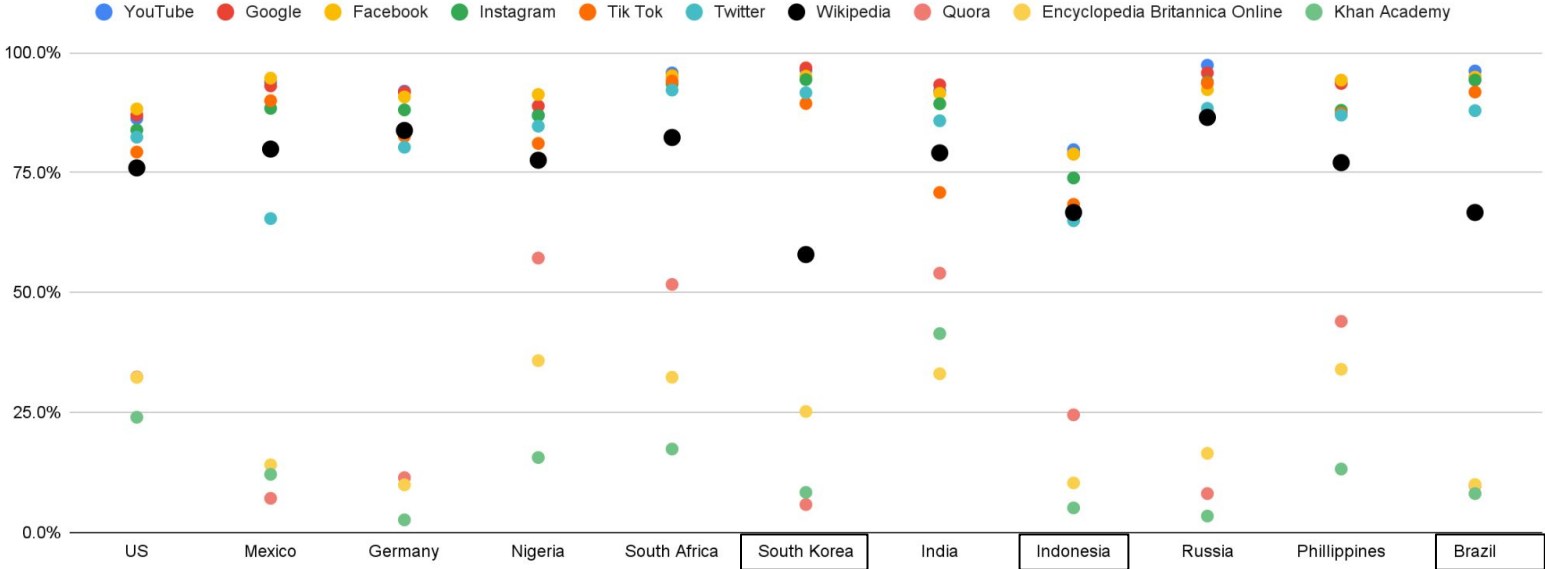
Brand awareness for Wikipedia vs competition
Aided brand awareness (%) for Wikipedia and competing brands



Base: All respondents
Q: Which of the following websites or apps have you HEARD of?

Our awareness dips below average in S.Korea, Indonesia and Brazil. Quora is gaining on our lead in Nigeria, South Africa, India & Philippines

Brand awareness for Wikipedia vs competition across markets
 Aided brand awareness (%) for Wikipedia and competing brands across markets

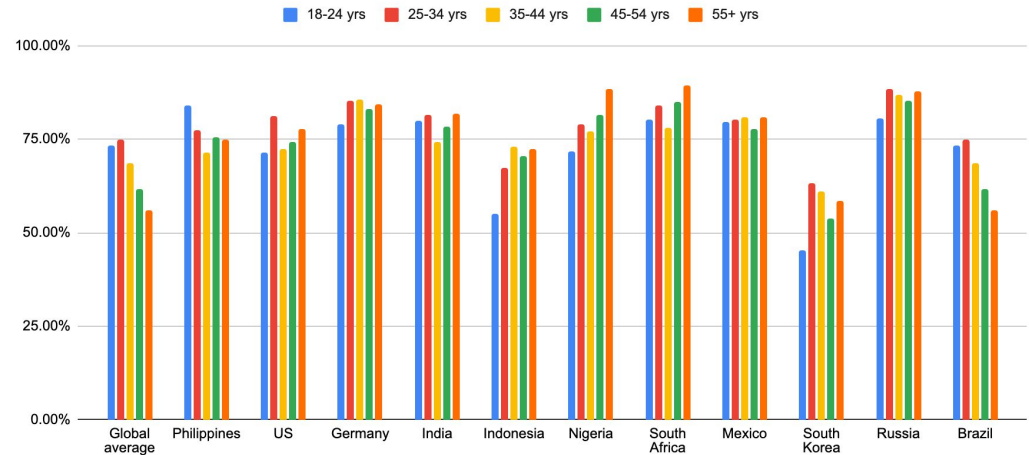
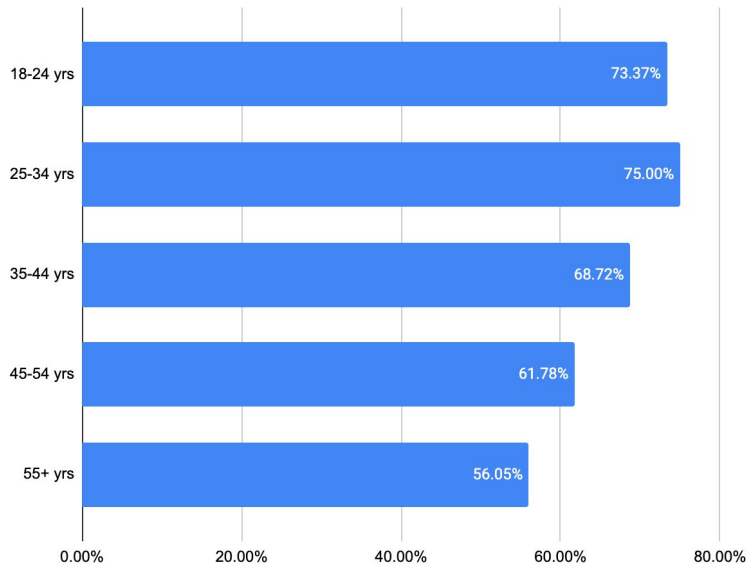


Base: All respondents
 Q: Which of the following websites or apps have you HEARD of?

18-24 year olds in the US, Germany, Indonesia, South Korea, and Nigeria have the lowest awareness when compared to other age groups

Brand awareness for Wikipedia by age groups

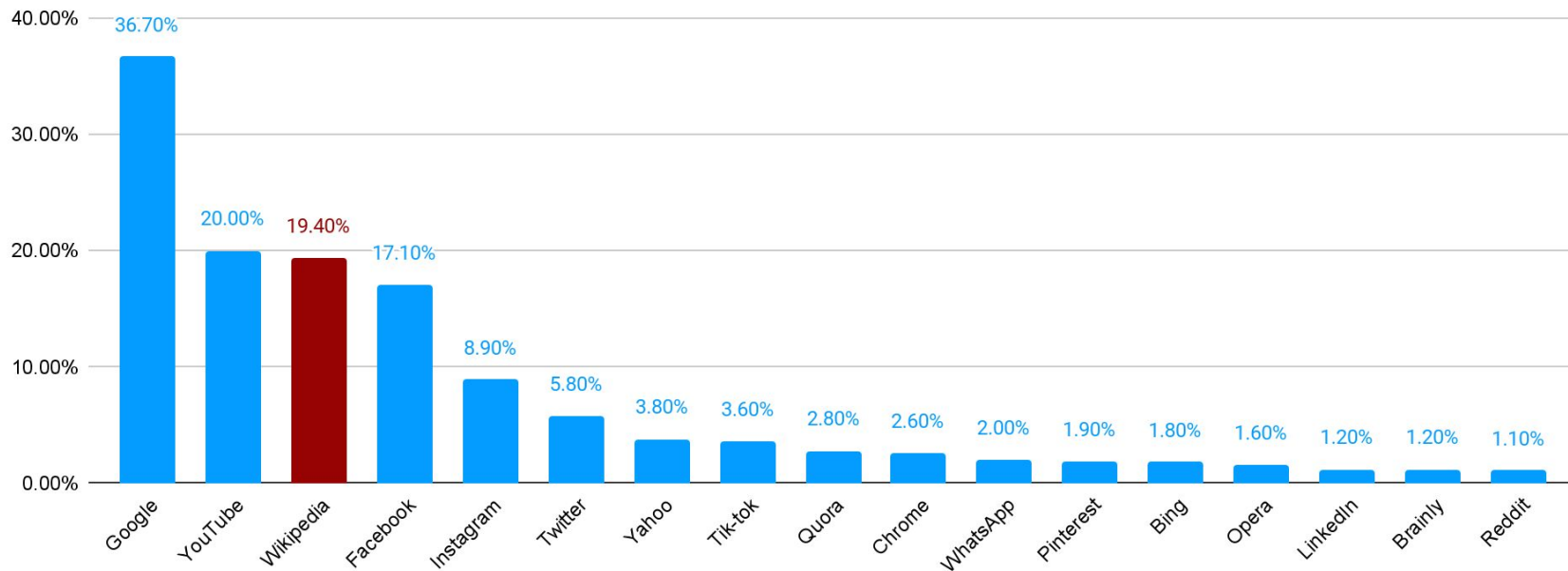
Aided brand awareness (%) for Wikipedia by age groups



When it comes to unaided awareness, Wikipedia has relatively strong recall for providing free information and knowledge about many subjects

Brand awareness for Wikipedia vs competition

unaided brand awareness (%) for Wikipedia and competing brands



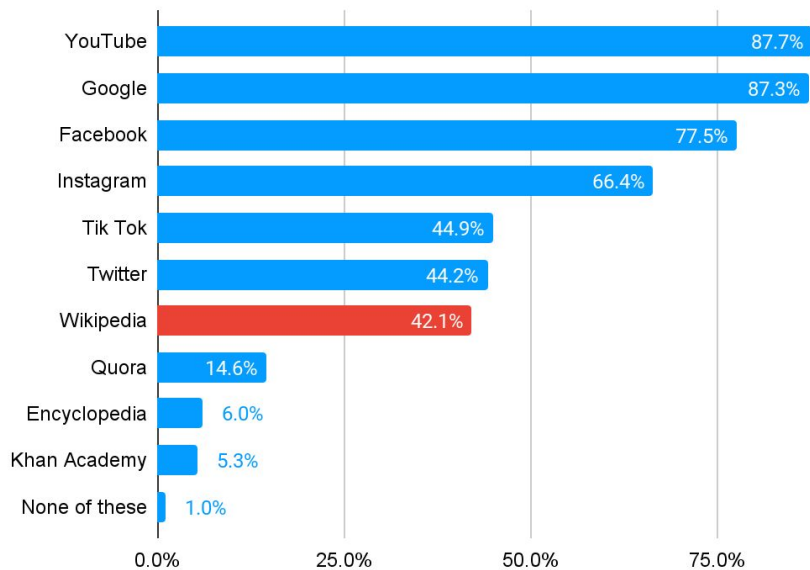
Base: All respondents

Q: There are many websites and apps that provide free information and knowledge about many subjects. Are you familiar with any such website or app? Please list up to 3 such websites and/or apps, using a comma.

The gap between aided awareness and usage is extremely wide across all markets

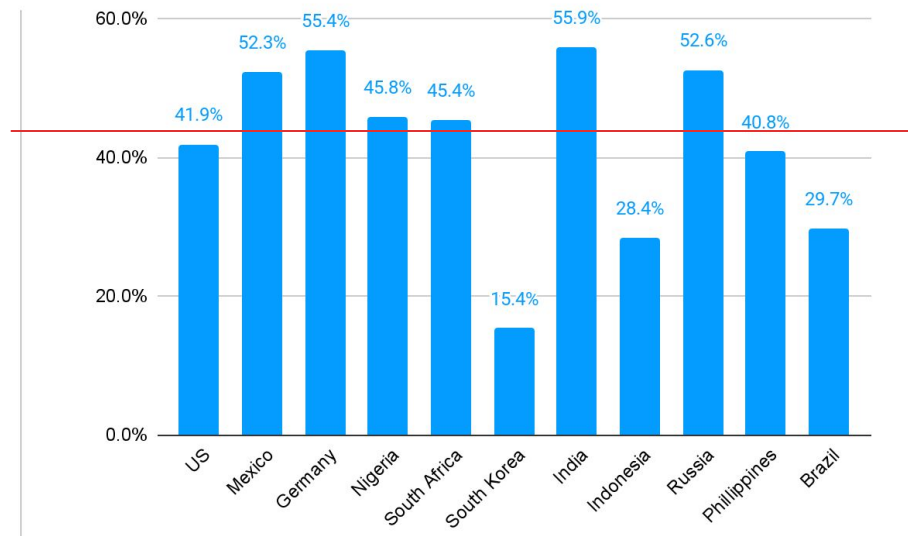
Wikipedia Usage vs competition

Usage responses (%) for Wikipedia and competing brands



Wikipedia Usage by markets

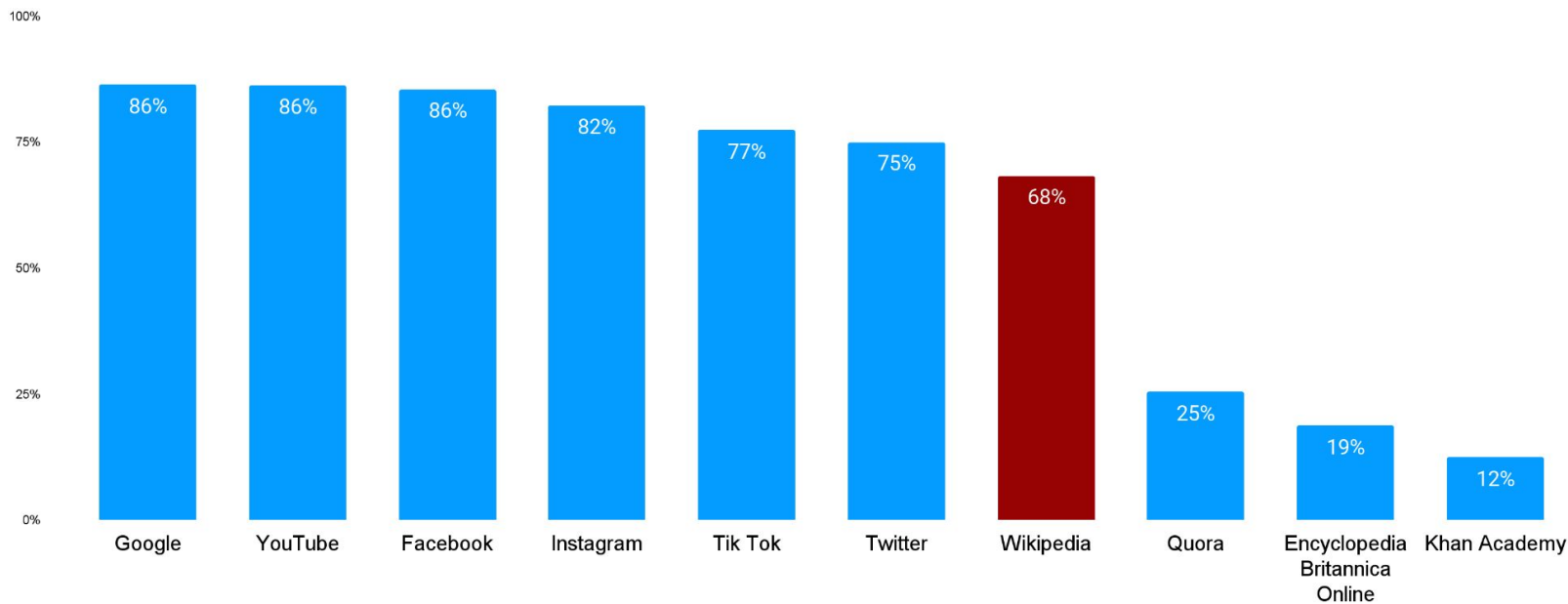
Usage responses (%) for Wikipedia across surveyed markets



While there is room for growth, Wikipedia's visibility is above average and closely tracks with brand awareness levels

Brand exposure for Wikipedia vs other competing brands/platforms

% brand exposure for Wikipedia and other brands (people who have seen the brand recently in any medium)



Base: Respondents aware of Wikipedia.

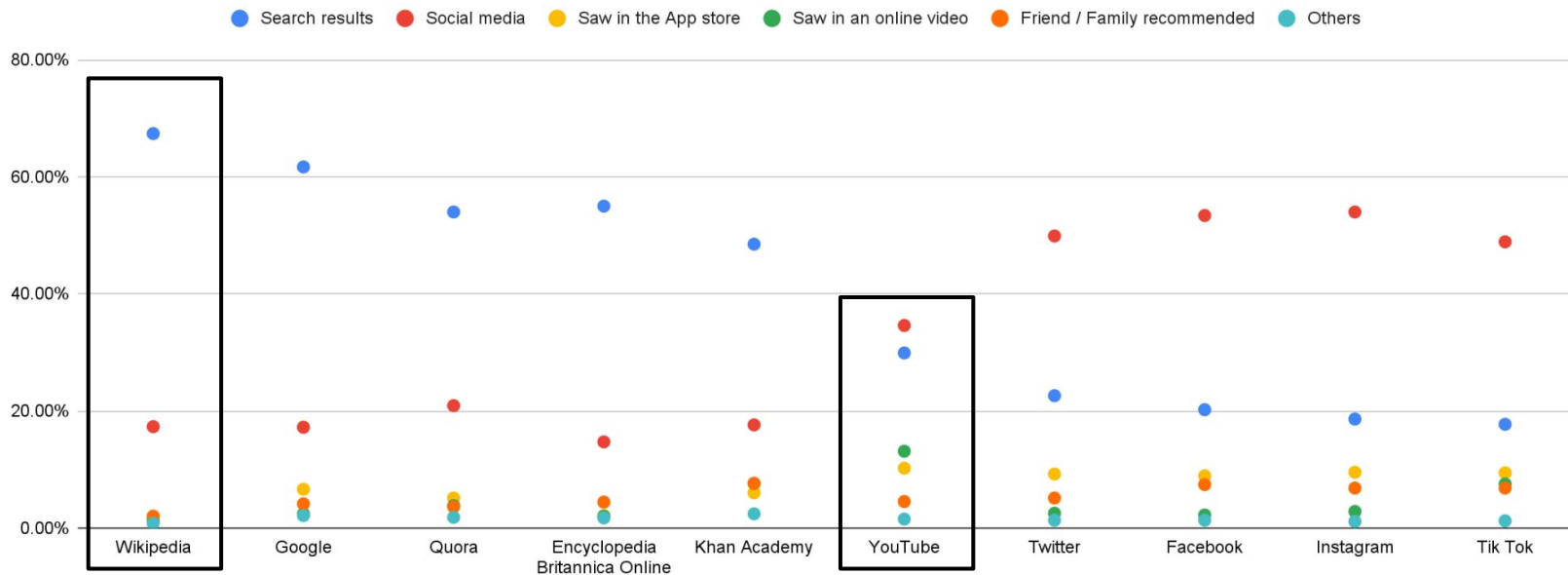
Q: WHERE do you remember seeing, hearing or reading about each of these brands recently? - Wikipedia

Calculated by subtracting the percentage of those who have not seen Wikipedia in any medium from 1

Wikipedia is almost entirely reliant on search for discoverability and traffic, whereas YouTube has struck a healthy presence across channels

Sources of brand exposure for Wikipedia and other competing brands

% self-reported sources of brand exposure by respondents for Wikipedia and other brands.



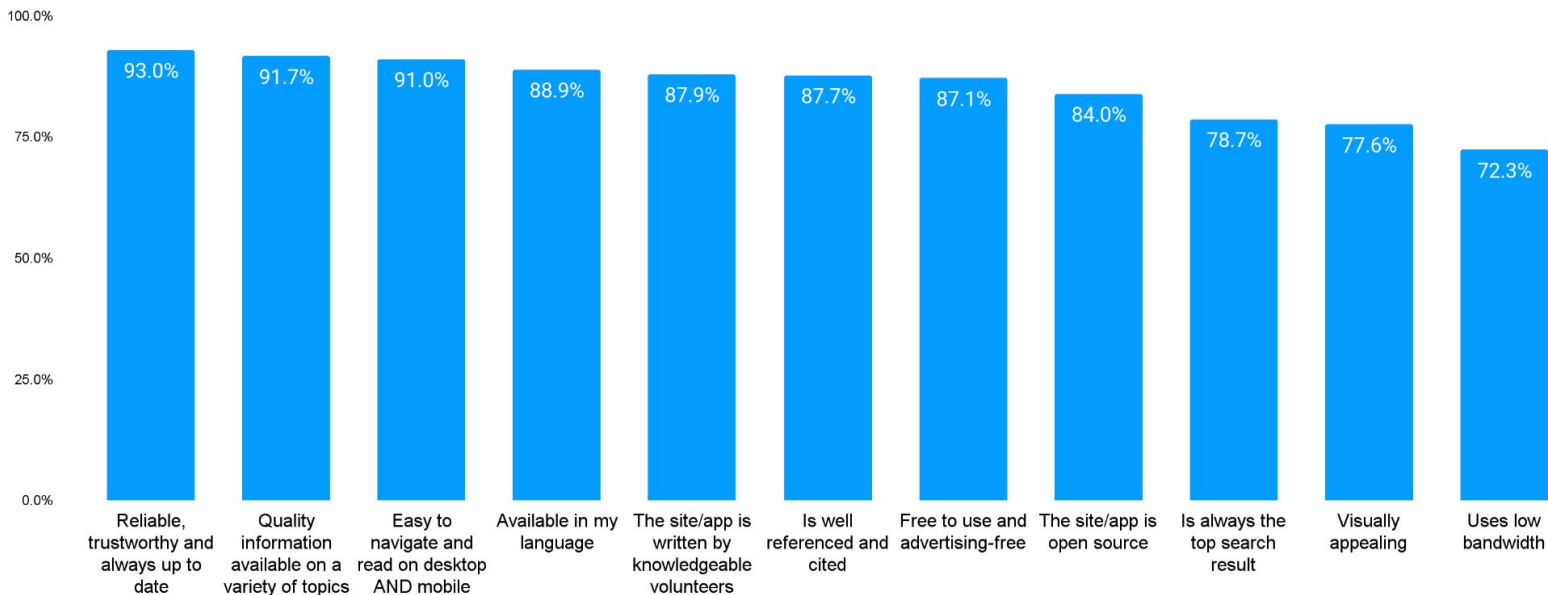
Base: Respondents aware of Wikipedia.

Q: WHERE do you remember seeing, hearing or reading about each of these brands recently? - Wikipedia

People are looking for knowledge sources that are trustworthy, covering a variety of topics, easy to navigate and “in my language”

Brand attributes importance about websites/apps for knowledge and information needs

% responses to importance of brand attributes of websites and/or apps for knowledge and information needs



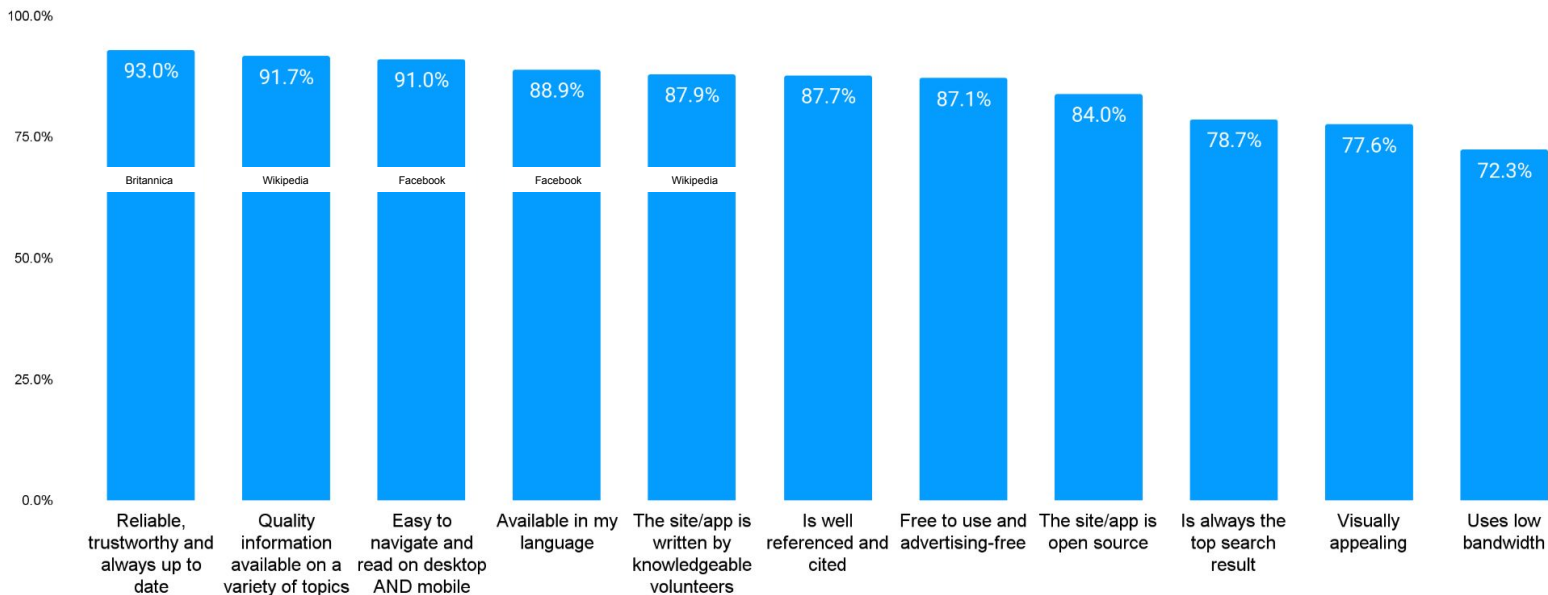
Base: All respondents

Q: How IMPORTANT are each of the following to you when deciding which websites or apps to use for information or learning new things?

Wikipedia is recognised for delivering high quality information on a wide range of topics by knowledgeable volunteers

Brand attributes importance about websites/apps for knowledge and information needs

% responses to importance of brand attributes of websites and/or apps for knowledge and information needs



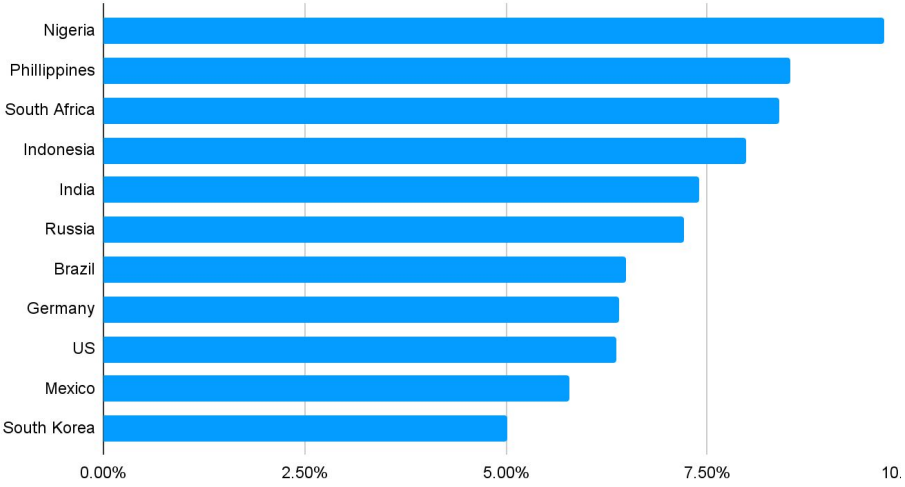
Base: All respondents

Q: How IMPORTANT are each of the following to you when deciding which websites or apps to use for information or learning new things?

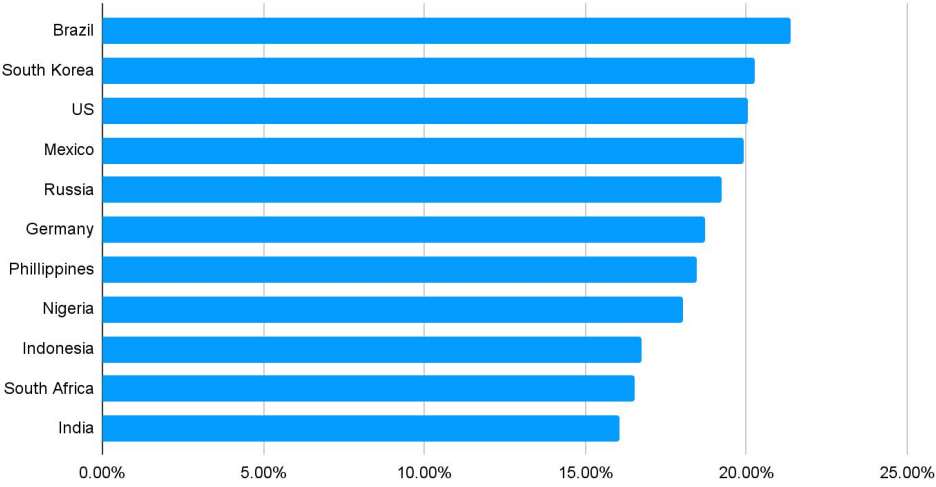
Developed markets rank Wikipedia low for reliability & trustworthiness, but rates it high on “quality information on a variety of topics”

Association of Wikipedia with reliability and quality of information
% attribution of reliability/trustworthiness and quality of information with Wikipedia across surveyed markets

Reliability and trustworthiness attribution with Wikipedia across markets



Quality of information attribution with Wikipedia across markets

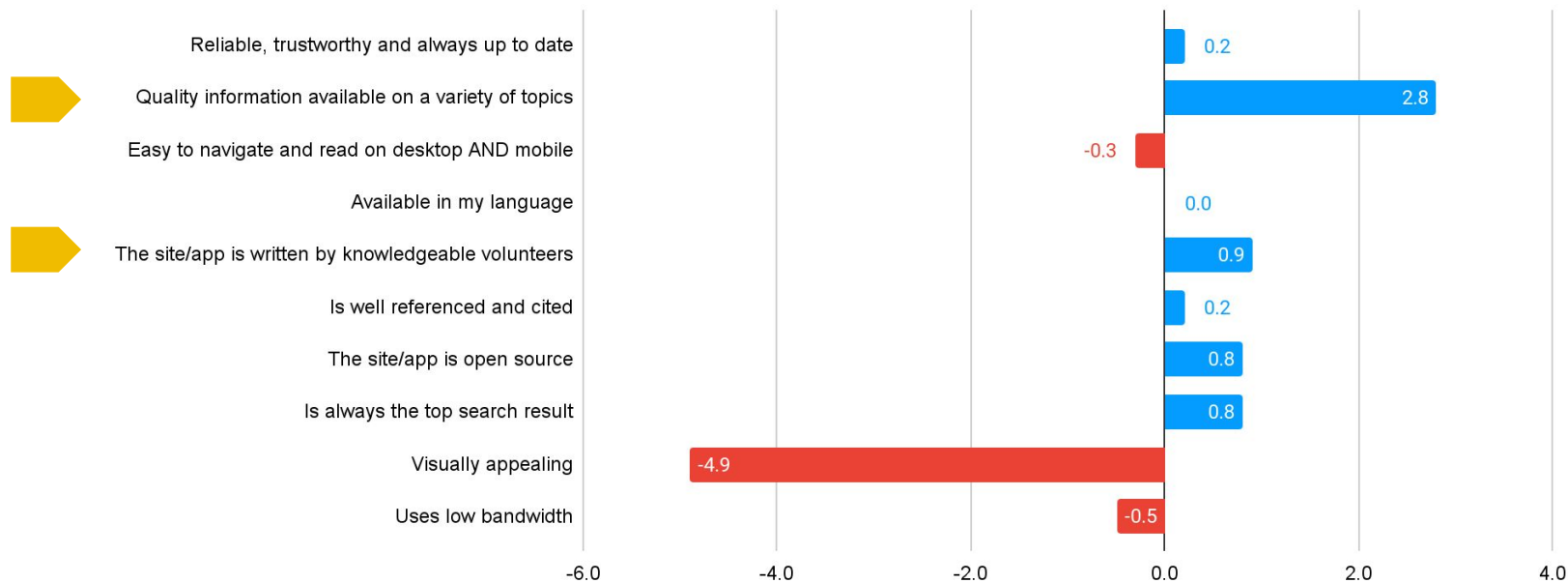


Base: Respondents aware of Wikipedia..
Q: Which of the following do you ASSOCIATE with each brand, if any? 1. Reliable, trustworthy and always up to date 2. Quality information available on a variety of topics

Wikipedia stands out for delivering high quality information on a wide range of topics by knowledgeable volunteers

Brand associations - how we fare - Wikipedia

Deviation from category average for Wikipedia to show how respondents relate attributes to the brand



Wikipedia is the only brand to score above average on 7 out the 10 key brand attributes for knowledge seekers

Brand attributes association for Wikipedia and other competing brands

% importance of brand attributes for Wikipedia vs competition for info/knowledge needs

	Wikipedia	Google	Facebook	Instagram	Twitter	YouTube	Tik Tok	Quora	Khan Academy	Encyclo Britton Online
Reliable, trustworthy and always up to date	0.2	0.7	-0.9	-0.8	-0.8	-0.3	1.7	0.3	1.8	1.7
Quality information on a variety of topics	2.8	1.4	-2.4	-2.1	-1.6	0.9	-4.1	1.3	-0.1	2.8
Easy to navigate on desktop and mobile	-0.3	0.3	1.4	0.0	0.3	0.7	-0.4	0.0	-0.4	-1.2
Available in my language	0.0	-0.1	2.6	1.4	2.3	0.2	2.3	-1.9	-2.2	-3.1
Written by knowledgeable volunteers	0.9	-0.6	-1.5	-1.5	-0.8	-1.9	2.1	1.4	1.8	2.5
Is well referenced and cited	0.2	0.1	-1.2	-0.8	-0.9	-1.1	-1.3	0.6	1.4	2.8
The site/app is open source	0.8	-1.1	0.5	-0.1	0.8	-0.2	0.9	0.7	-1.3	-1.4
Is always the top search result	0.8	2.3	-0.1	-0.4	-0.5	1.1	-0.5	-1.0	-0.5	-0.8
Visually appealing	-4.9	-2.6	1.7	4.4	0.6	2.2	6.8	-2.2	-1.2	-3.1
Uses low bandwidth	-0.5	-0.3	0.0	-0.2	0.6	-1.7	0.0	0.7	0.6	-0.3

Base: Respondents aware of each brand..

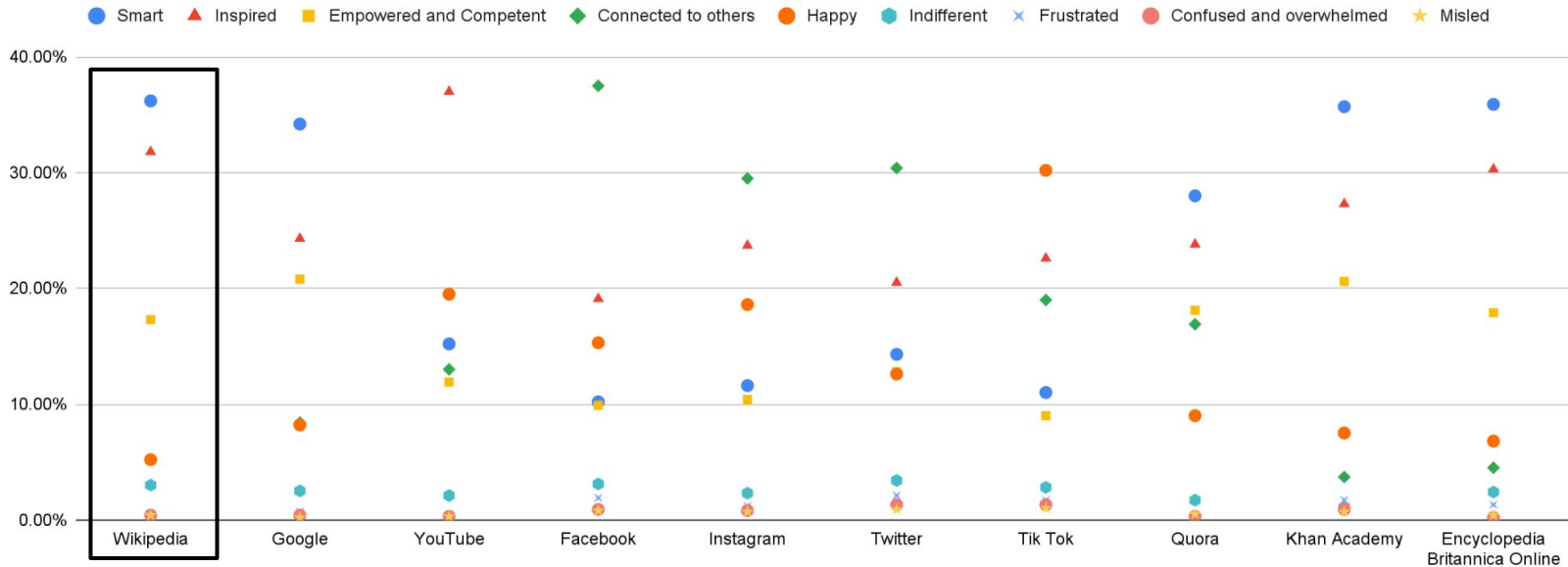
Q: Which of the following do you ASSOCIATE with each brand, if any?

Brand Love

Wikipedia makes people feel smart, inspired and empowered but we fail to make people feel connected to others

Emotional feelings with brands

Varied emotional feelings with Wikipedia and other competing brands



There is an opportunity to explore how these powerful emotional benefits can be leveraged to further distinguish Wikipedia

Emotional feelings with brands - Deviations

Deviations from category averages for emotional feelings of aware respondents with Wikipedia and competing brands

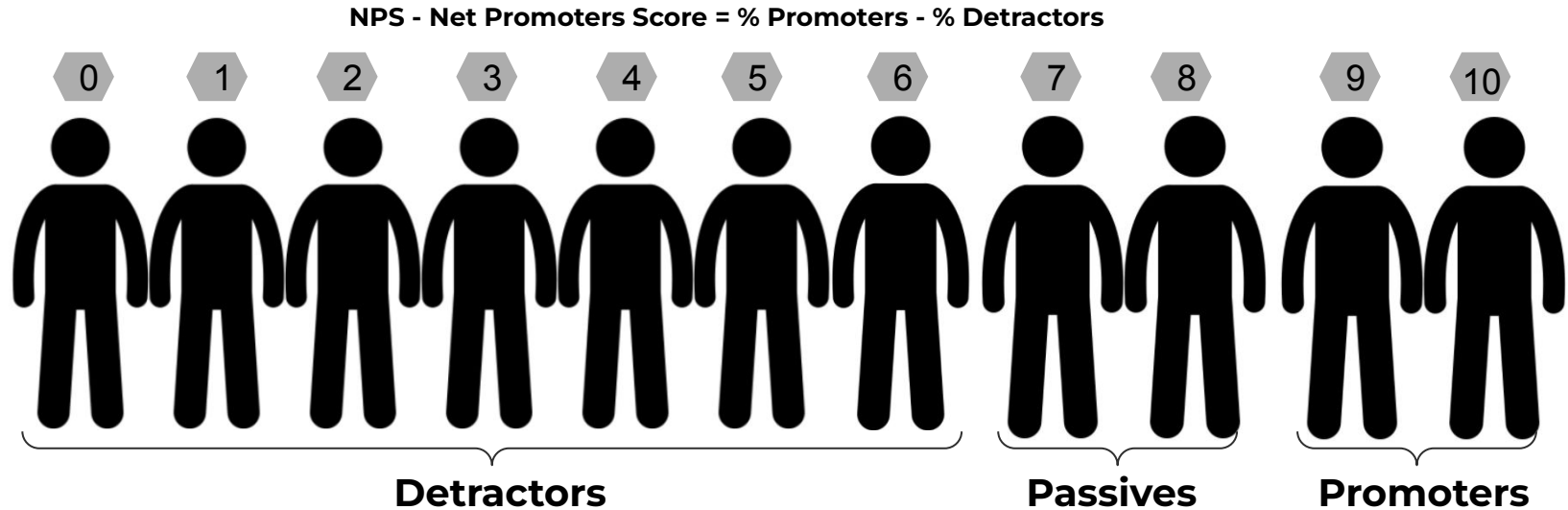
	Wikipedia	Google	Facebook	Instagram	Twitter	YouTube	Tik Tok	Quora	Khan Academy	Encyclo Britta Online
Smart	13.0	11.0	13.0	-11.6	-8.9	-8.0	-12.2	4.8	12.5	12.7
Inspired	5.8	-1.7		-2.3	-5.5	11.0	-3.4	-2.2	1.3	4.3
Empowered & Competent	2.4	5.9		-4.5	-2.1	-3.0	-5.9	3.2	5.7	-3.0
Connected to others	-11.6	-8.4	20.7	12.7	13.6	3.8	2.2	0.1	-13.1	-12.3
Happy	-8.1	-5.1	2.0	5.3	-0.7	6.2	16.9	-4.3	-5.8	-6.5
Indifferent	0.6	0.1	0.7	-0.1	1.0	-0.3	0.4	-0.7	-1.3	0.0
Frustrated	-0.7	-0.5	0.7	0.0	0.9	-0.8	0.5	-1.0	0.5	0.1
Confused and overwhelmed	-0.3	-0.3	0.2	0.1	-0.6	-0.4	0.6	-0.4	0.2	-0.5
Misled	-0.2	-0.4	0.2	0.1	0.3	-0.3	0.4	-0.1	0.1	-0.2
Bored and unhappy	-0.5	-0.4	0.8	0.3	1.1	-0.2	0.7	-0.8	0.2	-0.2

Base: Respondents aware of each brand.

Q: How do you FEEL when you USE each of the following?

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?



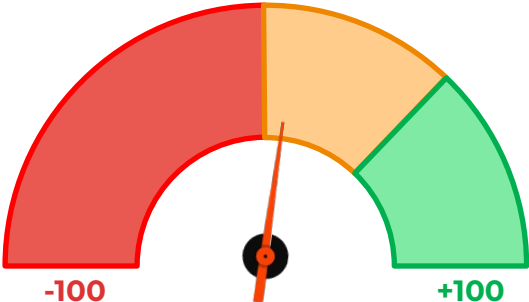
Base: Respondents aware of each brand.

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

Google and YouTube have the highest promoter scores by far while Wikipedia and Khan Academy are on par

Net Promoter Score

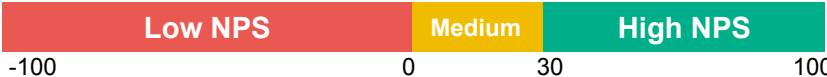
The level of likely advocacy among users, reflecting the strength of the overall customer experience.



Wikipedia

+14.6

- Promoters: 46%
- Passives: 22%
- Detractors: 32%



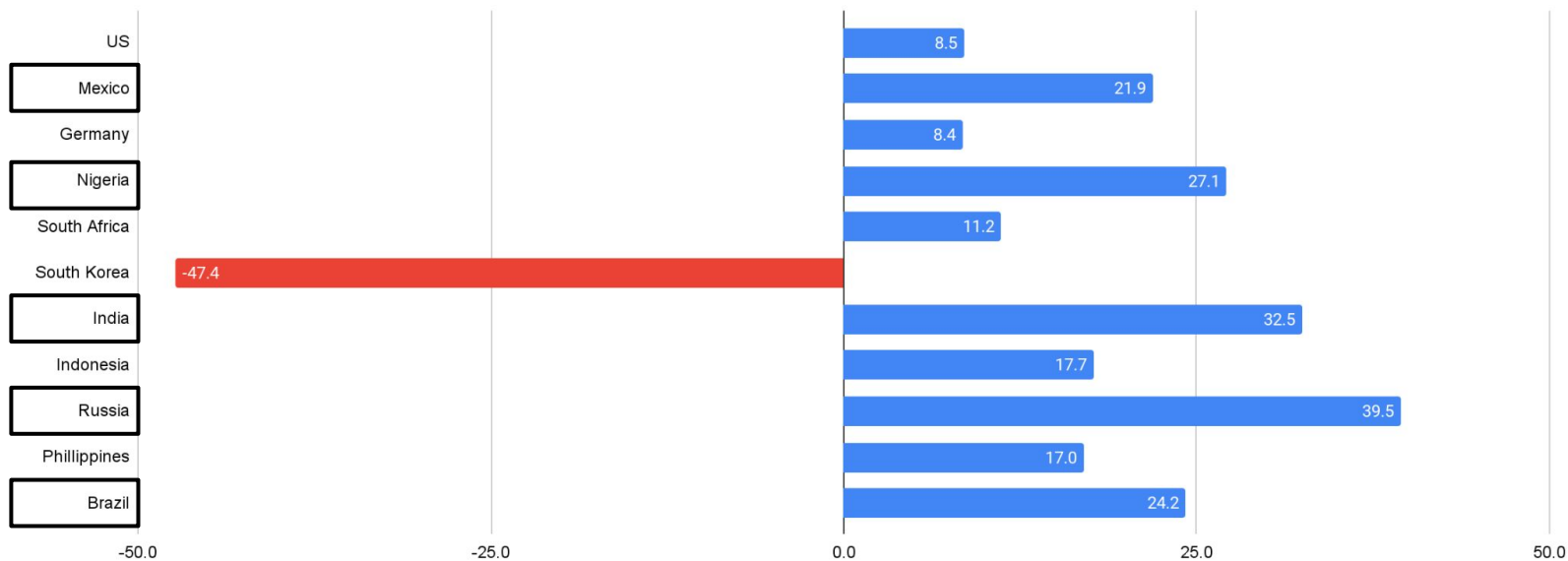
<p>Google</p> <p>+54.7</p> <p>(69% / 17% / 14%)</p>	<p>YouTube</p> <p>+44.3</p> <p>(62% / 21% / 18%)</p>	<p>Khan Academy</p> <p>+14.0</p> <p>(46% / 22% / 32%)</p>
<p>Facebook</p> <p>+11.8</p> <p>(44% / 22% / 33%)</p>	<p>Encyclopedia Britannica Online</p> <p>+6.9</p> <p>(39% / 27% / 33%)</p>	<p>Instagram</p> <p>+6.2</p> <p>(41% / 23% / 36%)</p>
<p>Quora</p> <p>-7.0</p> <p>(32% / 28% / 40%)</p>	<p>Twitter</p> <p>-15.4</p> <p>(31% / 23% / 47%)</p>	<p>Tik Tok</p> <p>-18.7</p> <p>(31% / 20% / 50%)</p>

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?

Our greatest supporters and advocates reside in Russia, India, Nigeria, Brazil and Mexico

Net Promoter Score - Wikipedia across surveyed markets

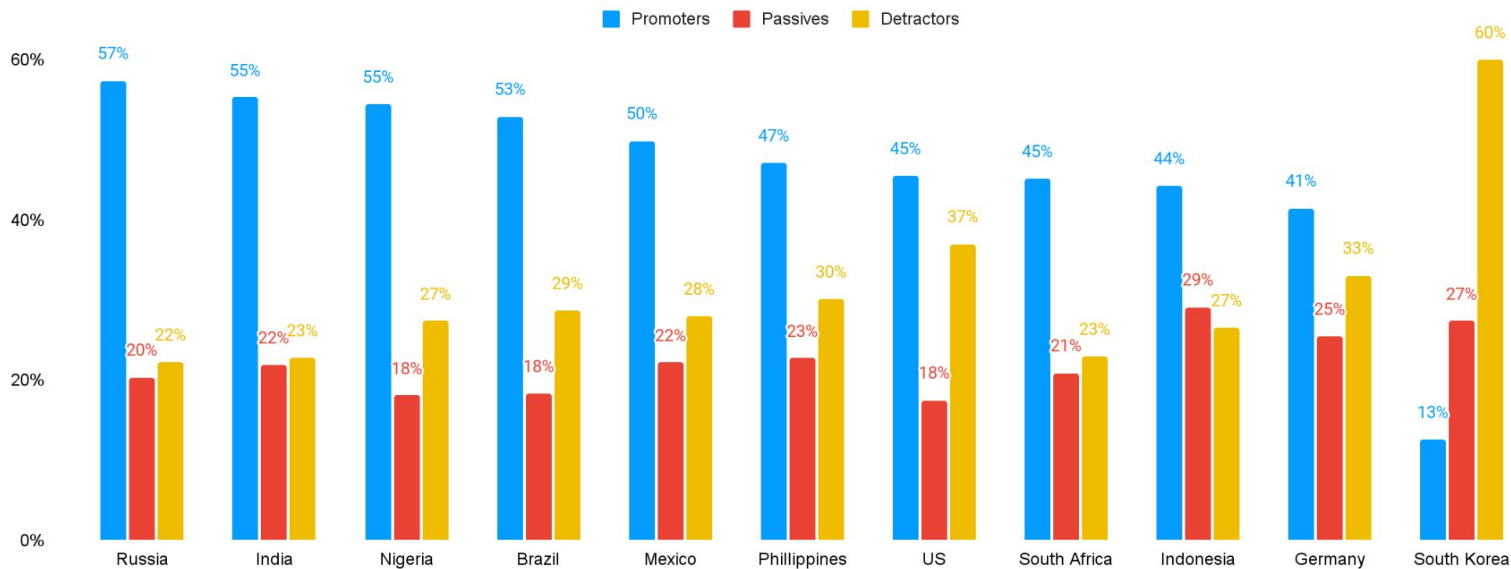
The level of likely advocacy among users, reflecting the strength of the overall customer experience.



Mature markets such as the US and Germany are the strongest drivers of negative sentiment

Net Promoter Score - Promoters, Passives, and Detractors for Wikipedia in markets

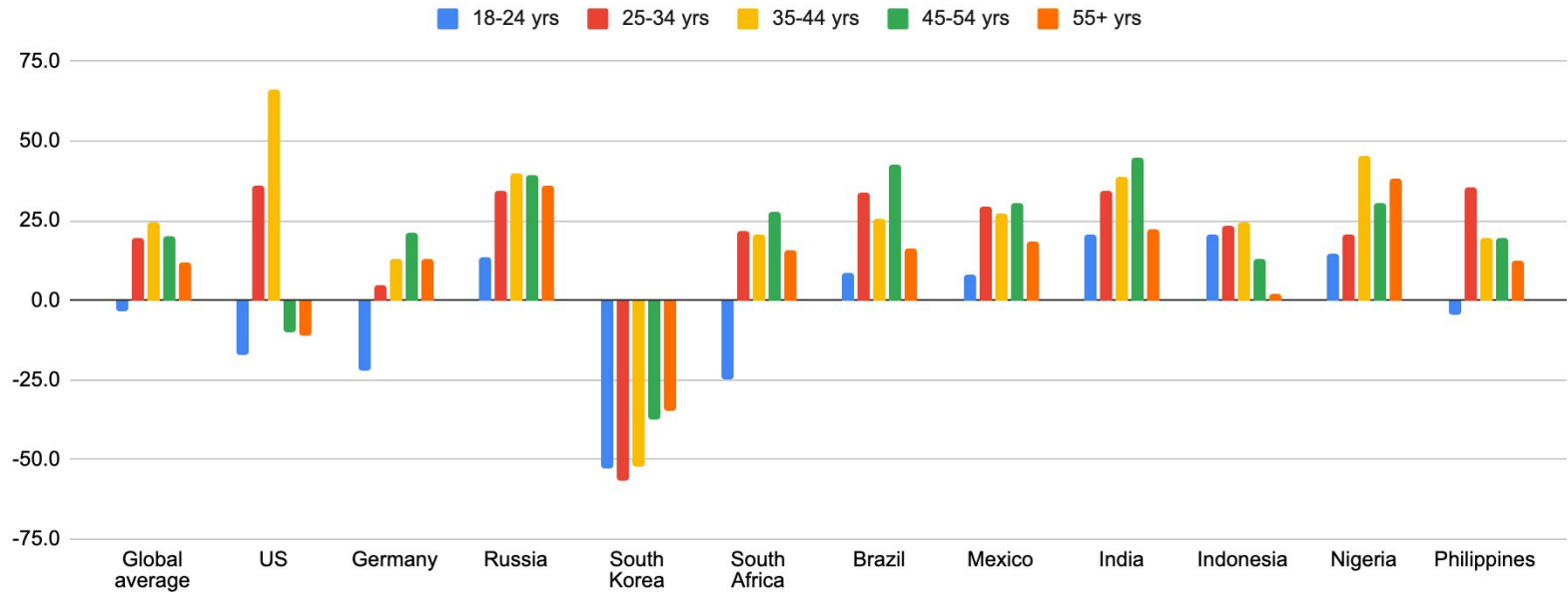
% promoters, passives and detractors of Wikipedia across surveyed markets



The 18-24 cohort's negative or very low scoring of Wikipedia poses a high risk for the future of the project and the brand

Net Promoter Score for Wikipedia by age groups

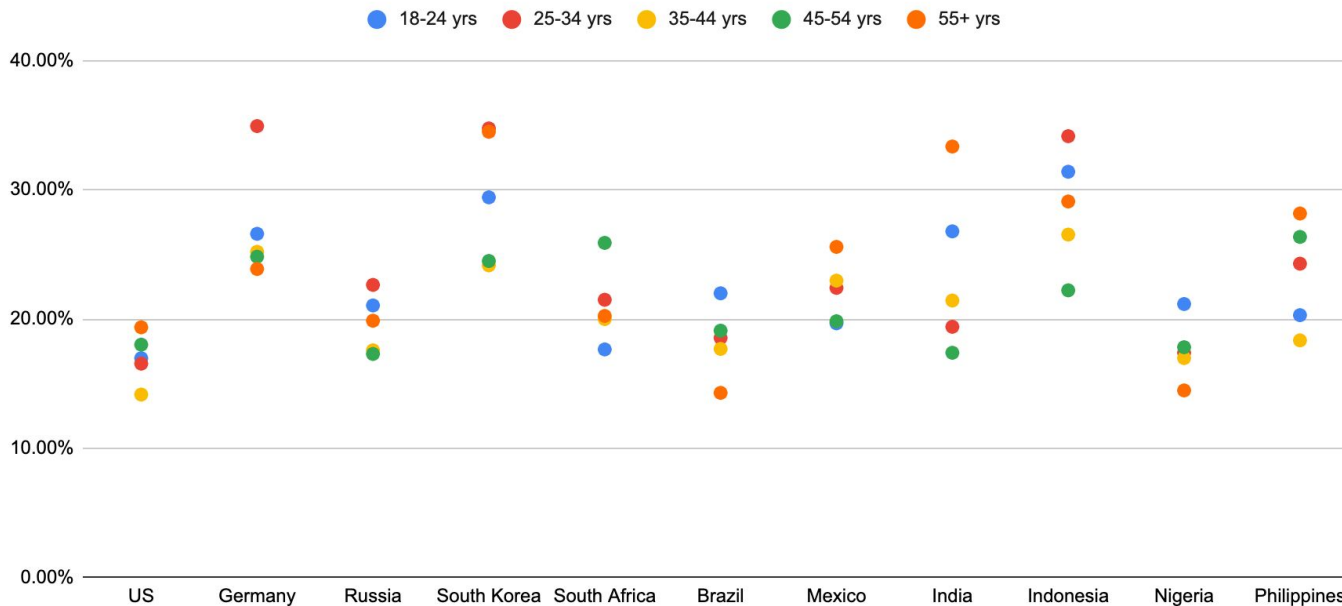
NPS figures for Wikipedia across surveyed markets



Passive respondents are mostly young adults, particularly those within ages 25-34 years and 55+

Passive users of Wikipedia by age groups

% respondents who are aware of Wikipedia but passive about recommending Wikipedia for information needs

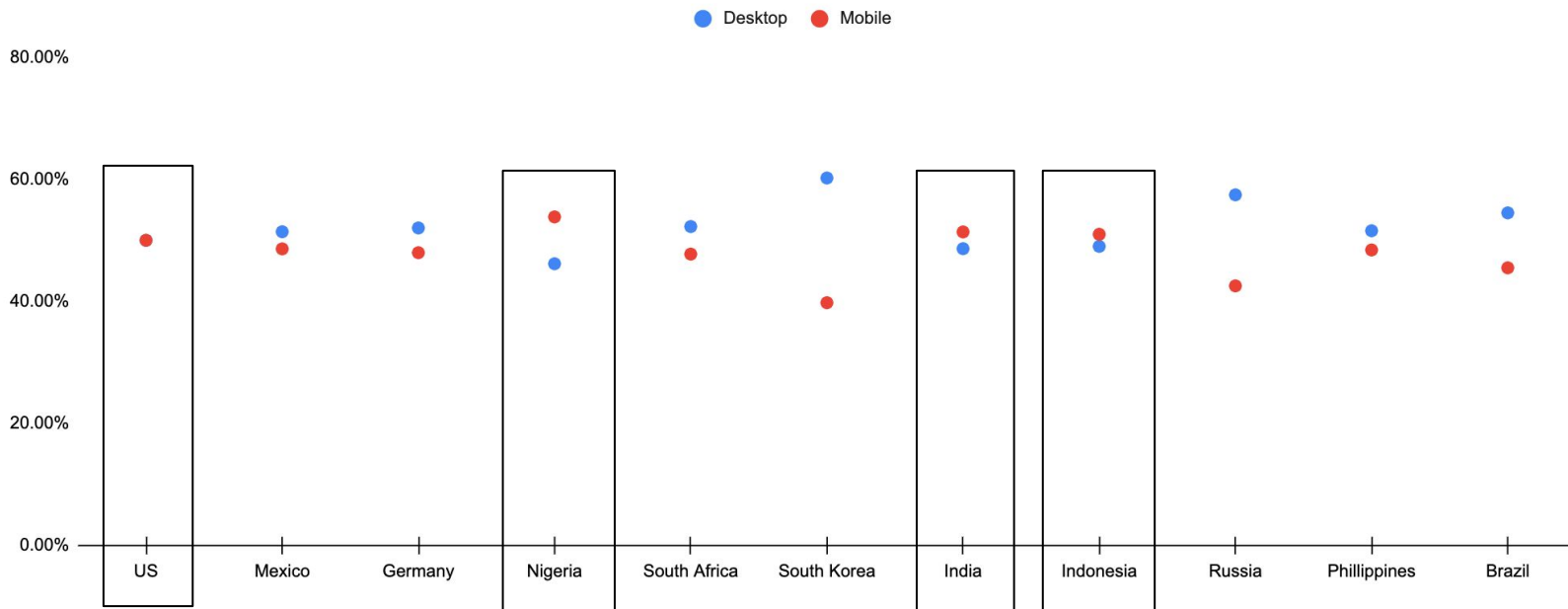


Readers

Nigeria, India, Indonesia and the US have now fully transitioned to mobile first wikipedia markets

Devices used to access Wikipedia across surveyed markets

% responses on devices users of Wikipedia and other brands access the platforms



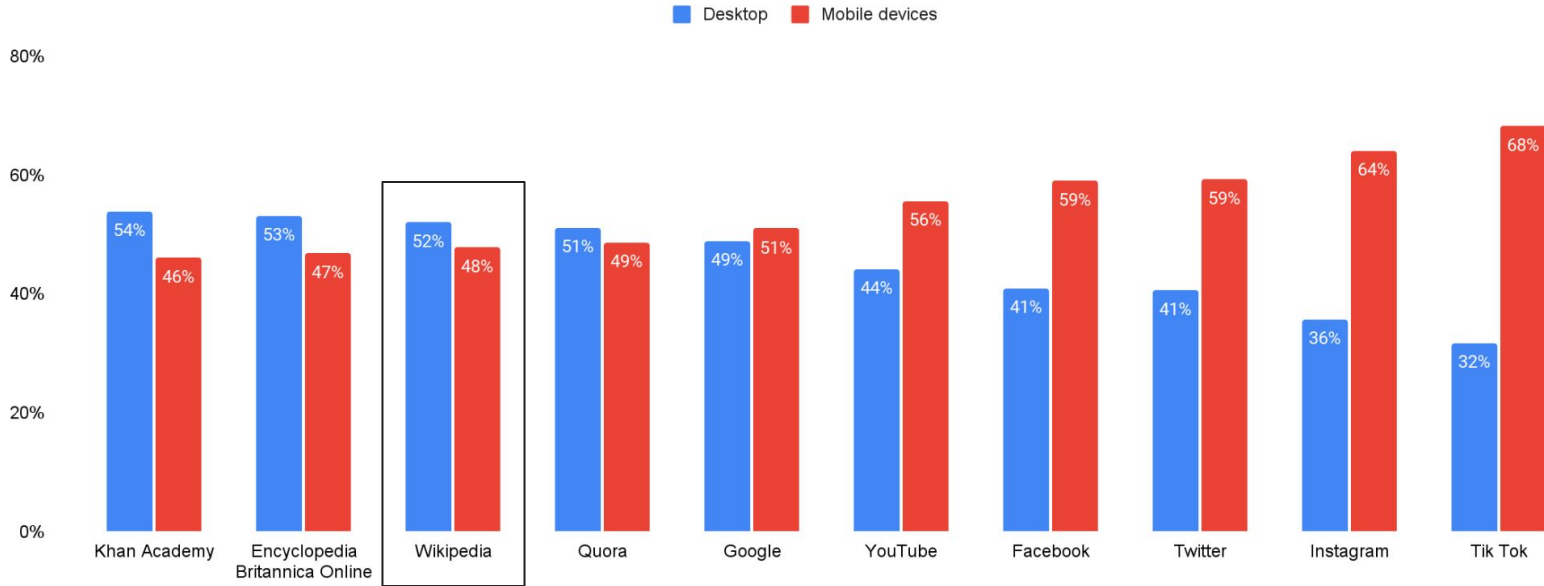
Base: Respondents who USE Wikipedia

Q: For each of the following websites/apps that you said you use for knowledge or information, please tell us the ways in which you ACCESS it. - Wikipedia

The world is accessing content on mobile, while text based traditional knowledge platforms lag behind

Devices used to access Wikipedia - Desktop vs Mobile

% responses on devices users of Wikipedia and other brands access the platforms (11-country average)



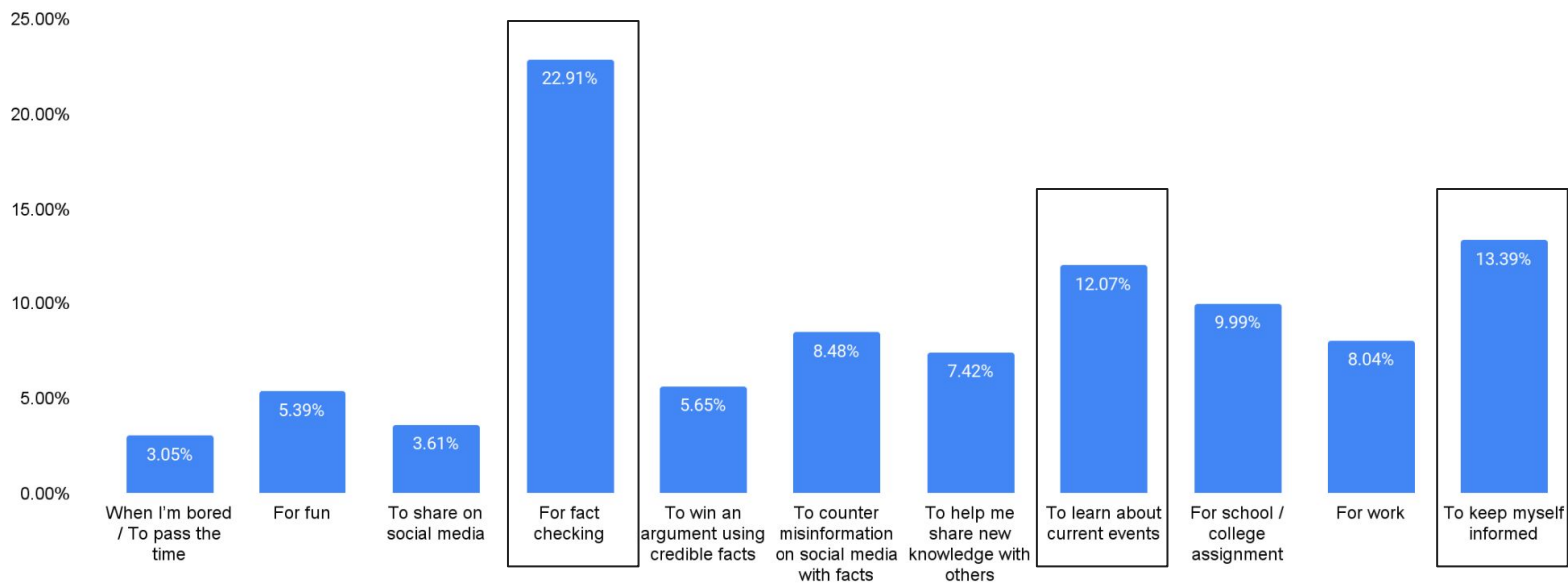
Base: Respondents who USE Wikipedia

Q: For each of the following websites/apps that you said you use for knowledge or information, please tell us the ways in which you ACCESS it. - Wikipedia

Wikipedia satisfies knowledge needs that have a sense of immediacy. Readers come to check facts, learn about current events & stay informed.

Purposes for which users of Wikipedia use the website

Responses on purposes for which Wikipedia is used (%) - 11-country average

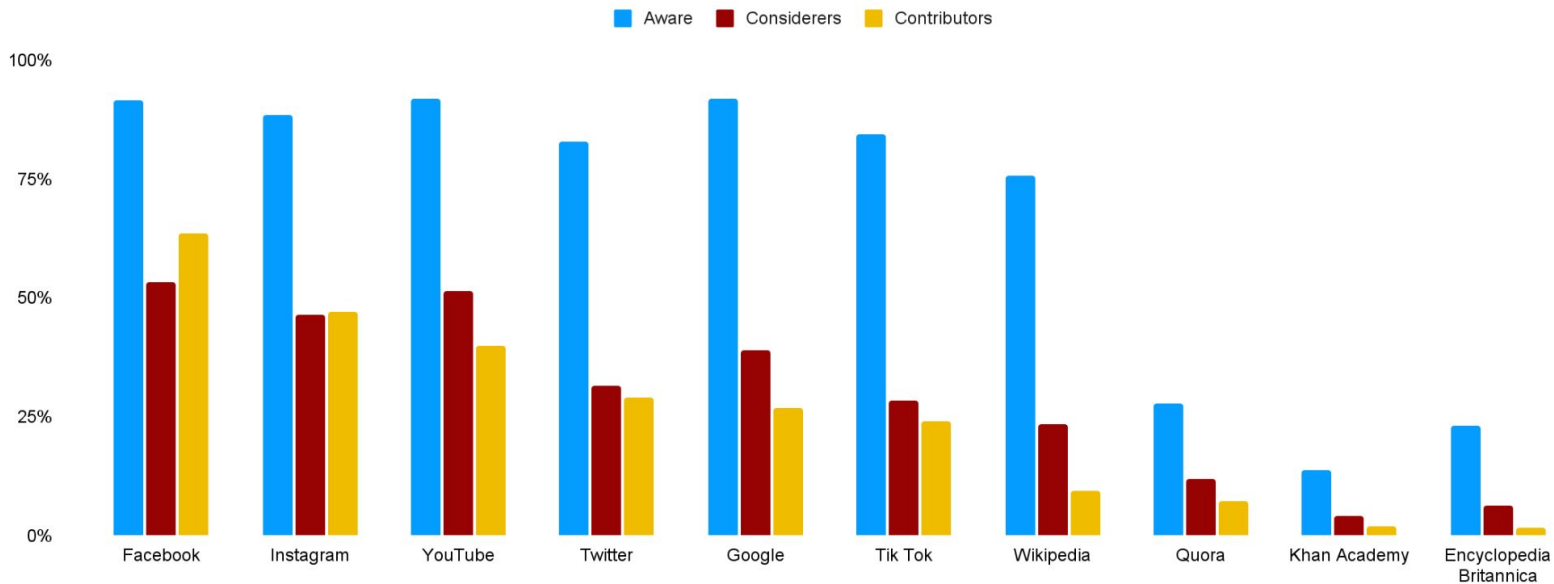


Editors

Wikipedia & TikTok have nearly identical levels of consideration however barriers to entry stop our users from becoming contributors

Editors/contributors and considerers to contribute to content on Wikipedia vs other platforms

Share of Wikipedia aware respondents, those currently contributing to content and those willing to do so in the future



AWARE
 Base: All respondents
 Q: Which of the following organizations or non-profits have you HEARD of?

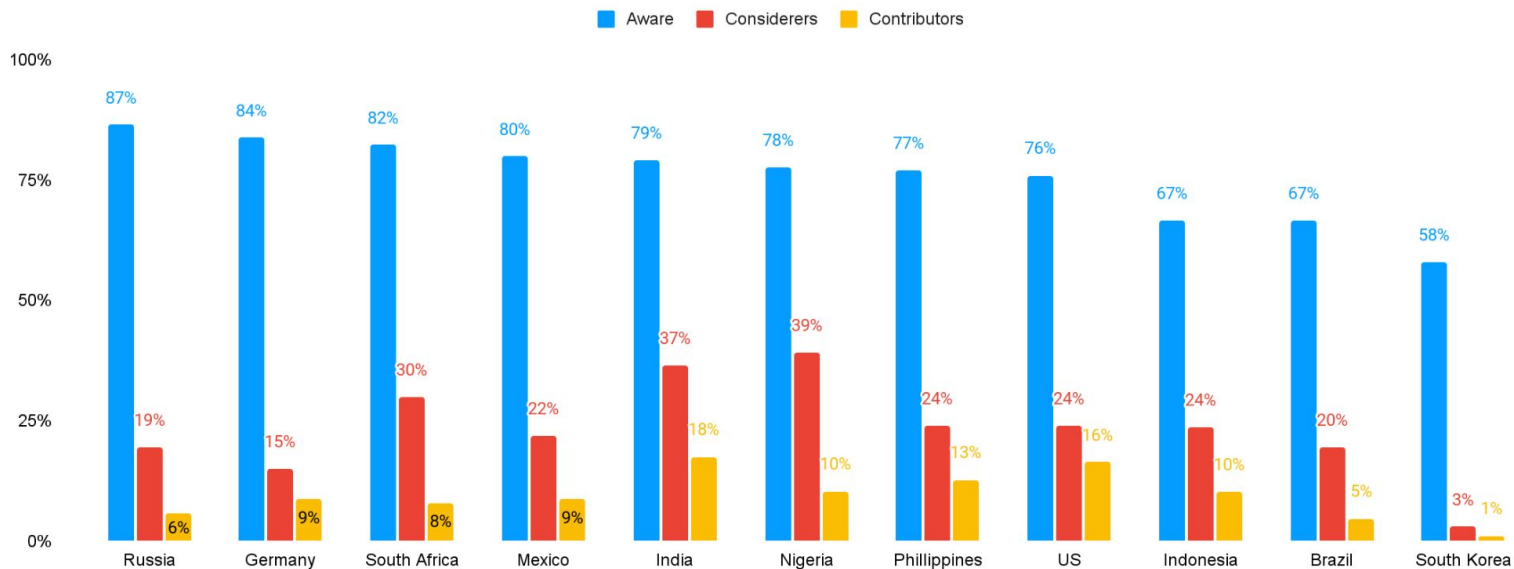
CONSIDERERS TO EDITY/CONTRIBUTE
 Base: Respondents aware of Wikimedia Foundation
 Q: Which of the following would you CONSIDER writing on, editing, posting, or publishing anything in the future?

CONTRIBUTORS
 Base: Respondents aware of Wikimedia Foundation
 Q: Which of the following projects have you ever written on, edited, posted, or published anything?

There is a high propensity to gain more editors from emerging markets like Nigeria, India, Indonesia, South Africa.

Editors/contributors and considerers to contribute to content on Wikipedia by countries

Share of Wikipedia aware respondents, those currently contributing to content and those willing to do so in the future



AWARE

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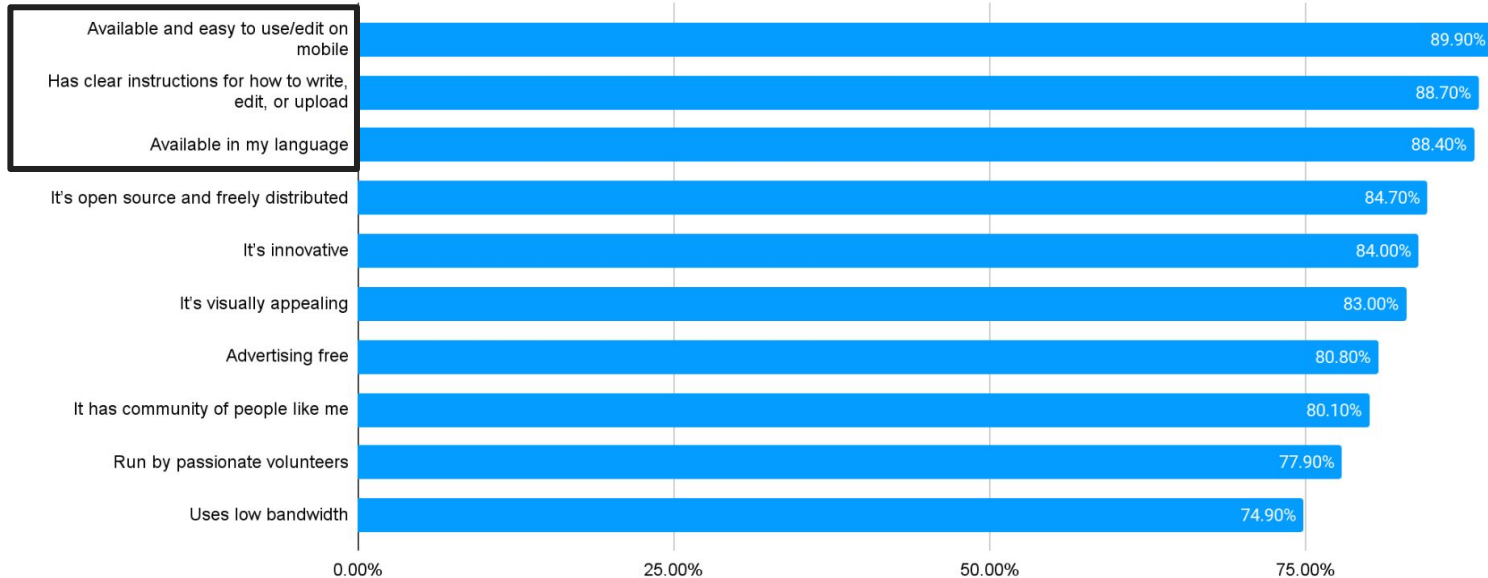
CONTRIBUTORS

Base: Respondents aware of Wikimedia Foundation
Q: Which of the following projects have you ever written on, edited, posted, or published anything?

Top drivers for editorship include mobile experience, language and clear instructions

Importance of factors for editing/contribution to content on platforms

% responses to importance of brand attributes of websites and/or apps for contributing and/or editing content





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