

Brand Health Tracker

Wave 2 | Communications | Jan 2022



WIKIMEDIA
FOUNDATION



Wikimedia Brand Health: Wave 2

Communications Department
Worldwide

- 1. Background & Summary**
- 2. The Wikimedia Free Knowledge Movement**
- 3. Wikimedia Foundation Brand Health**
- 4. Wikipedia Brand Health**
- 5. Summary & Recommendations**
- 6. Appendix**

01

Background

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

**Free Knowledge
Movement**

**The Wikimedia
Foundation as an
Organization**

**Wikipedia, as a
project brand**

Methodology

Sample & Fieldwork

1,000 respondents per country

Representative of online populations, using interlocked age and gender quotas

Age 18+

Margin of error for each country +/- 3%

Fieldwork dates: Sept 26th 2022 - Oct 14th 2022

Note, this tracker runs bi-annually

Markets (by region)

Sub-Saharan Africa	South Africa Nigeria
East, South East Asia & Pacific	South Korea Indonesia
North America	United States
South Asia	India
Middle East & North Africa	Egypt UAE
Northern & Western Europe	Germany
LatAM & Caribbean	Argentina Brazil
Central & Eastern Europe & Central Asia	Russia

Differences from Stream 1

Countries added: Argentina, Egypt, UAE

Countries removed: Mexico, Philippines

Question areas added:

- Free Knowledge Movement awareness
- Brand familiarity
- Brand relevance
- Brand distinctiveness
- Trust deeper dive
- Wikipedia usage deeper dive

Summary of findings

1.

Opportunity to better tell the story of the Free Knowledge Movement

There's a lack of concern about access to free knowledge, low awareness of the Free Knowledge Movement, and low understanding of how access to free knowledge links to positive impacts in the world

2.

WMF is liked, trusted and associated with free knowledge, but awareness low

When people know WMF they like and trust the organization, and associate it with leading free knowledge access. However, awareness and familiarity with the foundation is very low. There's an opportunity to increase this awareness

3.

The Wikipedia brand is strong across most of the markets

Wikipedia enjoys high presence, and high numbers of people are aware of the brand, consider it, use it and would recommend it. And generally people see the brand positively. The exception is in KR where the brand plays less well

4.

Wikipedia's brand trajectory differs between markets

Even though the brand is generally strong, it is strengthening in some markets (especially ID and NG) but weakening in others (especially the US and KR) - creating a strategic question of where to focus for growth

5.

WMF and Wikipedia have an opportunity to better engage young people

Less 18-24 year olds are aware of WMF. And for Wikipedia, although there's high awareness of the brand among 18-24 year olds, this age group tends to be the least likely to consider, use and want to advocate for the brand

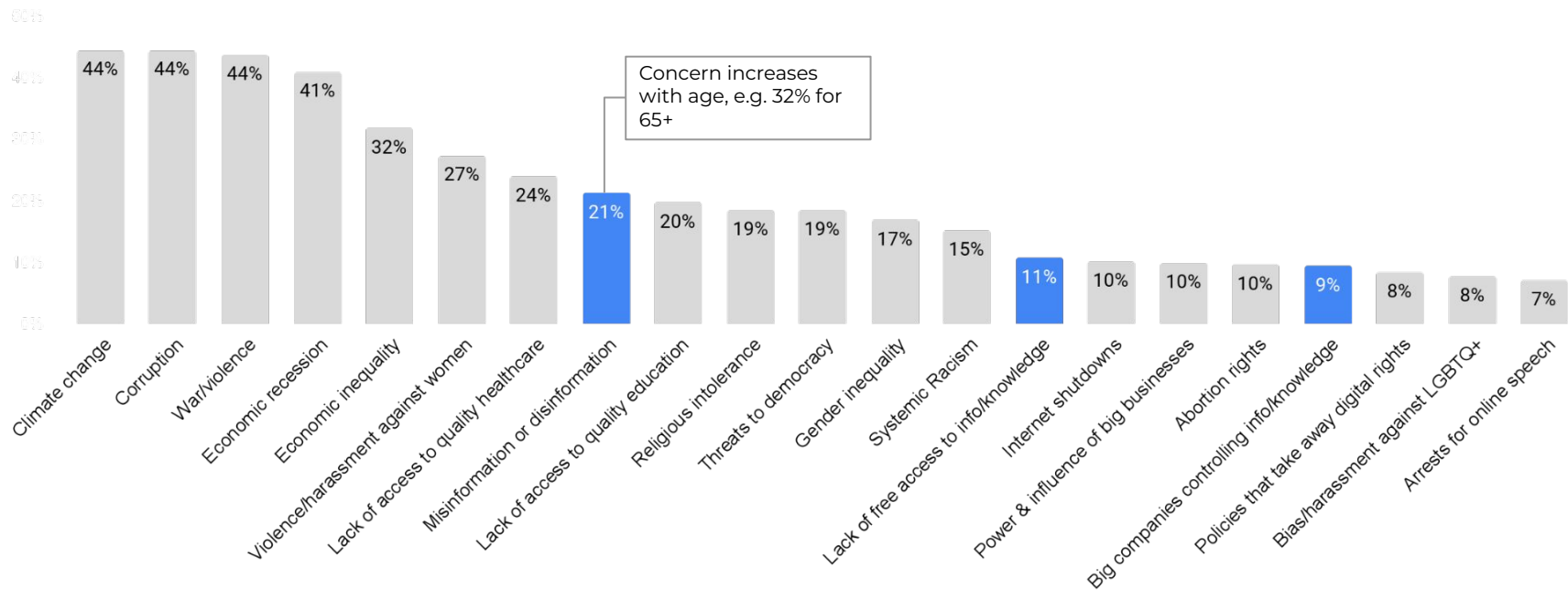
02

**The Free
Knowledge
Movement**

There's more concern about mis/disinformation vs. lack of free access to knowledge, suggesting we need to educate around this issue

Global/local concerns

% stating the issues they are most concerned about (multiple choice)



Lack of concern about free knowledge access is global - low concern across all markets, though RU, KR concerned about mis/disinformation

Global/local concerns

% stating they are most concerned about (multiple choice)



“Through algorithms, people are only accessing information that fits their interests and biases, and the gap with other points of view is widening, and is leading to conflict. In addition, as misinformation becomes so easily accessible, the misuse of fake information is increasing, which is a social problem we all need to be wary of.”

Respondent, South Korea

Different concerns within each country, with corruption top in some, climate change in others, war in RU and DE, and economy in the US

Global/local concerns (Top 3)

% stating they are most concerned about (multiple choice)

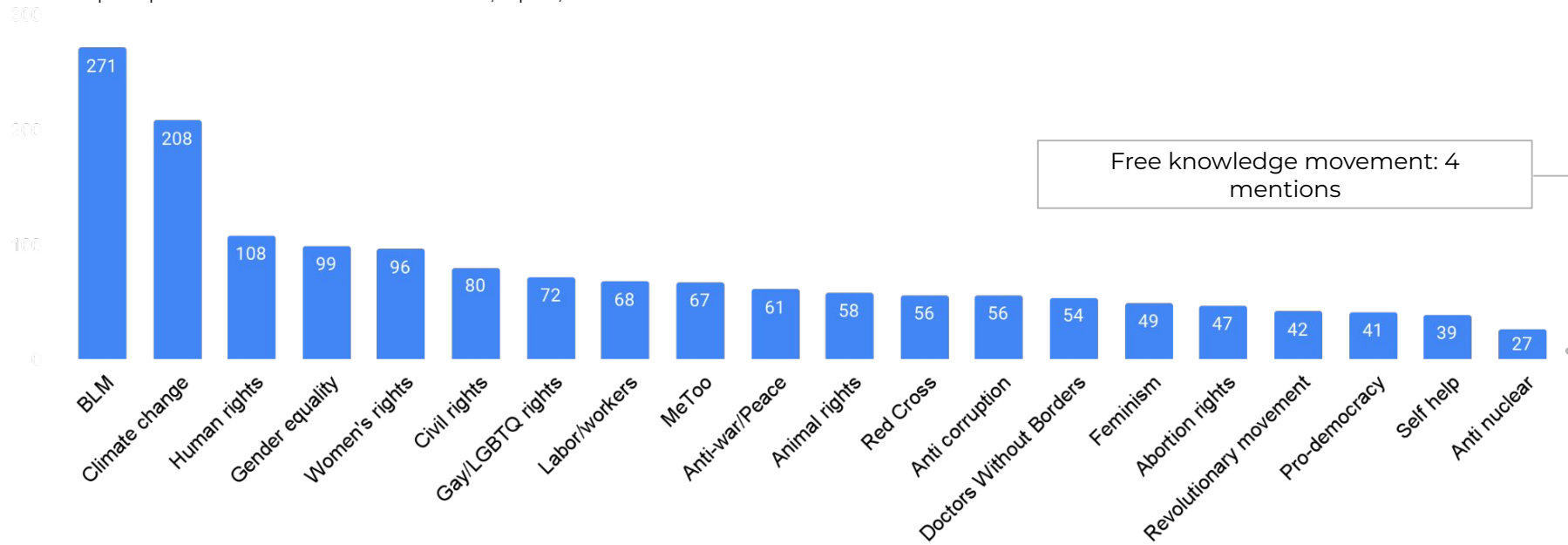
	US	BR	EG	DE	IN	ID	NG	RU	ZA	KR	AR	AE
1	Economic recession	Corruption	Climate change	War or violence between countries	Climate change	Climate change	Corruption	War or violence between countries	Corruption	Climate change	Corruption	Climate change
2	Climate change	Economic inequality	Corruption	Climate change	Corruption	Economic recession	Economic recession	Corruption	Climate change	Economic recession	Economic inequality	War or violence between countries
3	War or violence between countries	Climate change	Economic recession	Economic recession	Violence or harassment against women	Corruption	Climate change	Mis/Dis-information	Violence or harassment against women	War or violence between countries	Climate Change	Corruption

Unprompted, BLM & climate change movements most top of mind; Free Knowledge Movement has very low unprompted awareness

Note: There was a very long tail of local movements mentioned by respondents in this open ended question

Movement salience (unprompted mentions)

Unprompted movements across all countries, top 20, number of mentions of each movement



In each country different movements come to mind depending on societal and political contexts; free knowledge isn't top of mind anywhere

Movement salience (unprompted mentions)

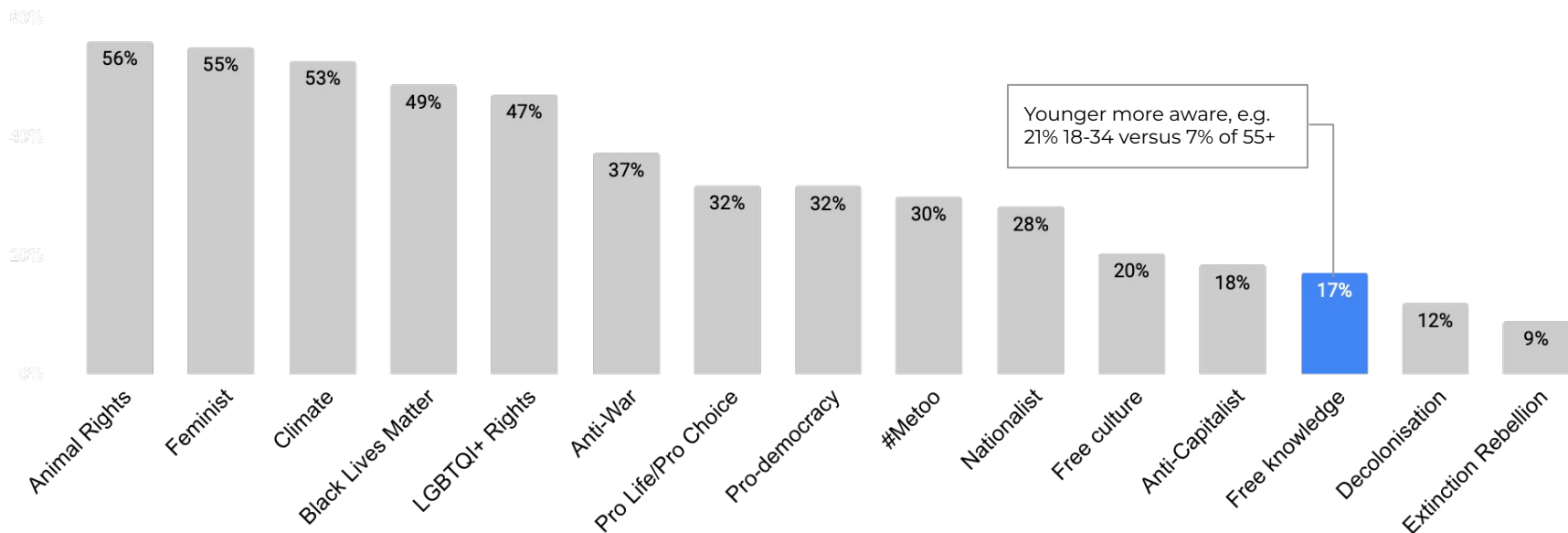
Unprompted movements, top 5 ranked movements mentioned in each country

US	BR	EG	DE	IN	ID	NG	RU	ZA	KR	AR	AE
BLM	LGBTQ rights	Women's rights	Fridays for Future	Climate change	Climate change	End SARS	Greenpeace	BLM	Climate change	LGBTQ rights	Climate change
Abortion rights	Feminism	Animal rights	Climate change	Religious freedom	Religious tolerance	Anti-corruption	Climate change	Climate change	Pro-democracy	Feminist movement	Women's rights
LGBTQ rights	Anti-racism	Climate change	Greenpeace	Chipko movement	Anti-corruption	BLM	LGBTQ rights	LGBTQ rights	Candlelight protests	Labor movement	BLM
Climate change	Landless workers	Human rights	LGBTQ rights	Women's rights	Women's rights	Climate change	Sober Russia	Corruption	Labor movement	Abortion rights	Education reform
Women's rights	Climate change	Anti-Corruption	Women's rights	BLM	Anti racism	Religious freedom	Stopxam	Anti gender based violence	Gender equality	Climate change	LGBTQ rights

When prompted there's some low awareness of the Free Knowledge Movement - there's an opportunity to improve this awareness

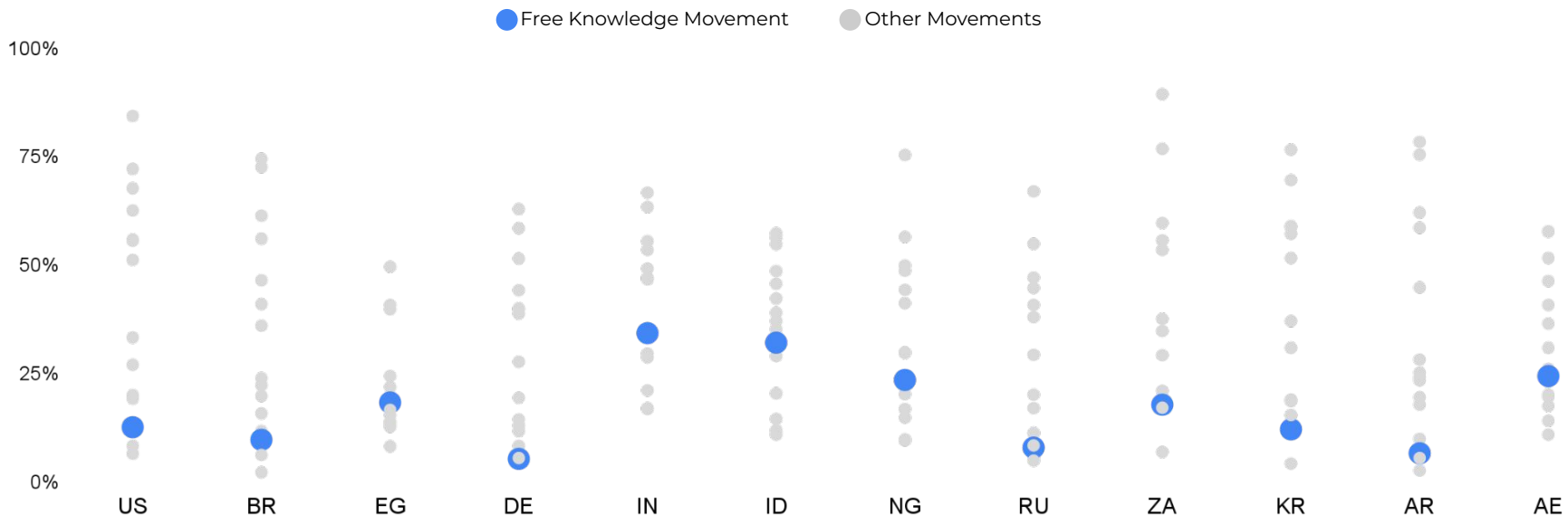
Movements aware of (prompted)

% stating awareness of each movement



People claim to be more aware of the Free Knowledge Movement in IN, ID, NG, and in AE where information may be more restricted

Movements aware of (prompted)
% stating awareness of each movement



Mis/disinformation, authoritarian governments and economic factors are seen as the biggest threats to free knowledge

Threats to having freely available information and knowledge

% stating each of the following as a threat to freely available information and knowledge

Older people more likely to see misinformation/disinformation and authoritarian governments as threats, younger more likely to see poverty as threat



0 10 20 30 40 50 60 70 80 90 100

“The government of my country has arbitrarily blocked access to many sites, dispersed ALL independent media and zombies the society with rabid lies and propaganda, therefore, people’s access to objective and complete information is significantly difficult.”

Respondent, Russia

“Hiding information behind a paywall so that economically disadvantaged sections of the population cannot access it.”

Respondent, Germany

“Lack of infrastructure in rural areas, normally stricken by poverty. Adults and children alike do not have access, and often neither the skills, to access computers, and lack internet infrastructure”

Respondent, South Africa

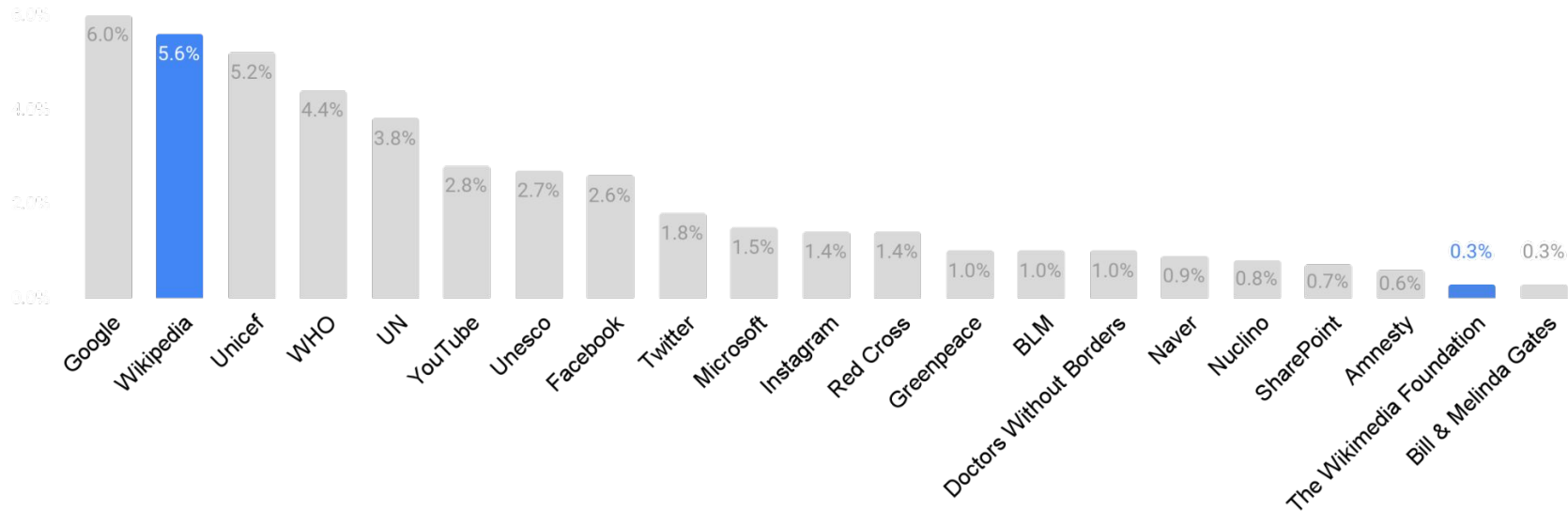
03

**Wikimedia
Foundation
Brand Health**

WMF doesn't come to mind when people think about organizations involved in free knowledge

Unaided awareness of organizations that support people who want to create and share free knowledge

% stating each of the following (unprompted)



Base: All respondents

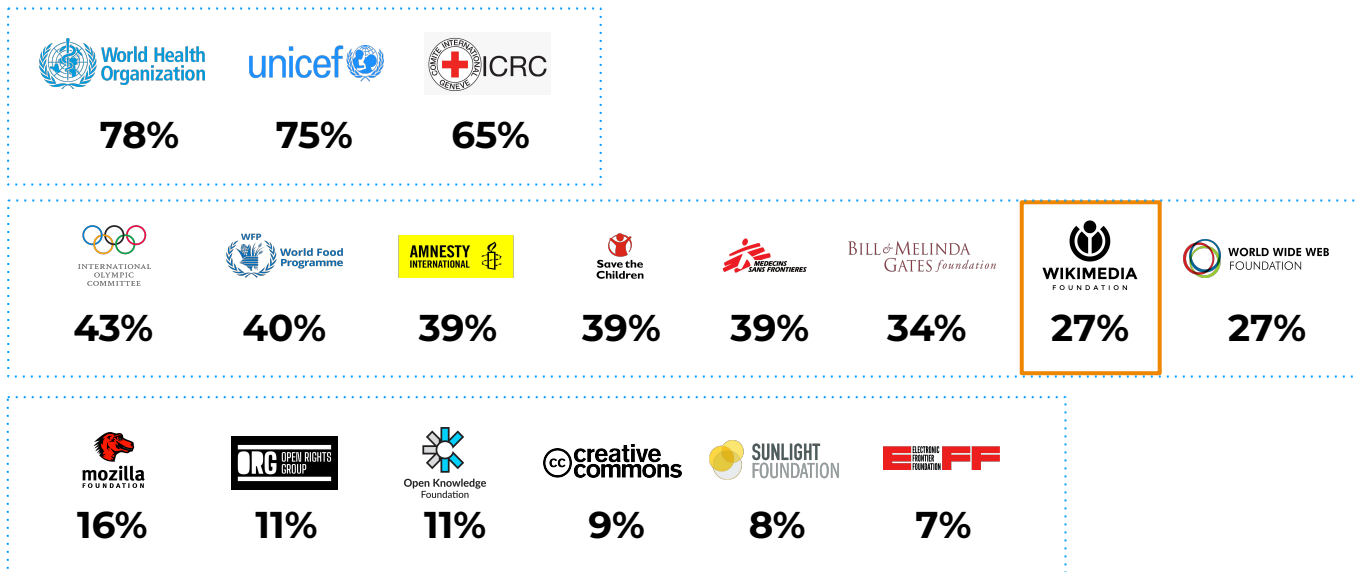
Q1. There are organizations that support people who want to create and share free knowledge and information. What organizations come to mind that do this?

When prompted, WMF awareness is relatively low compared to other nonprofits

Awareness higher in EG, IN, ID and lower in BR and KR; Awareness also lower for 18-24s (see appendix)

Awareness for Wikimedia Foundation and other non-profits

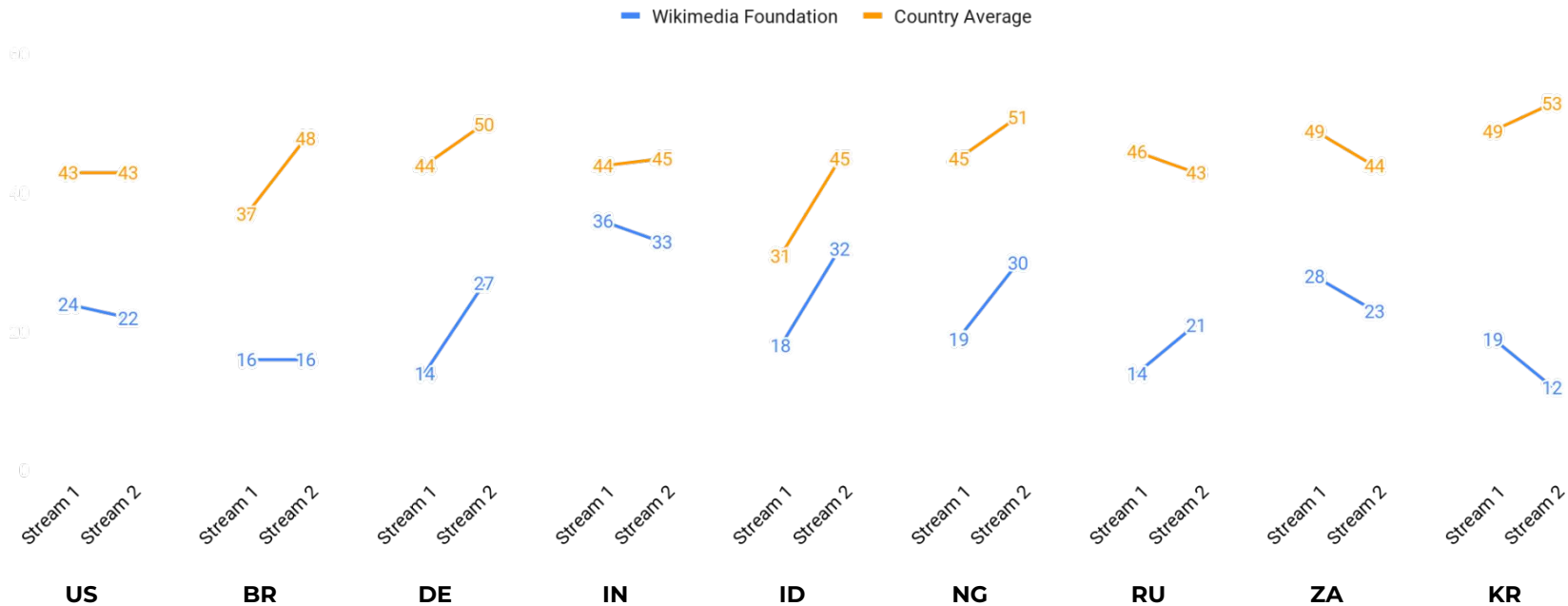
Aided brand awareness (%) for Wikimedia Foundation and other non-profits



WMF awareness looks like it has grown since Stream 1 in DE, ID, NG and RU (though wait for further survey waves to understand trends)

Brand awareness for Wikimedia Foundation & other non-profits by time period

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



Likeability for WMF has increased or remained stable in all countries except US and ID

Likeability for Wikimedia Foundation vs other non-profits

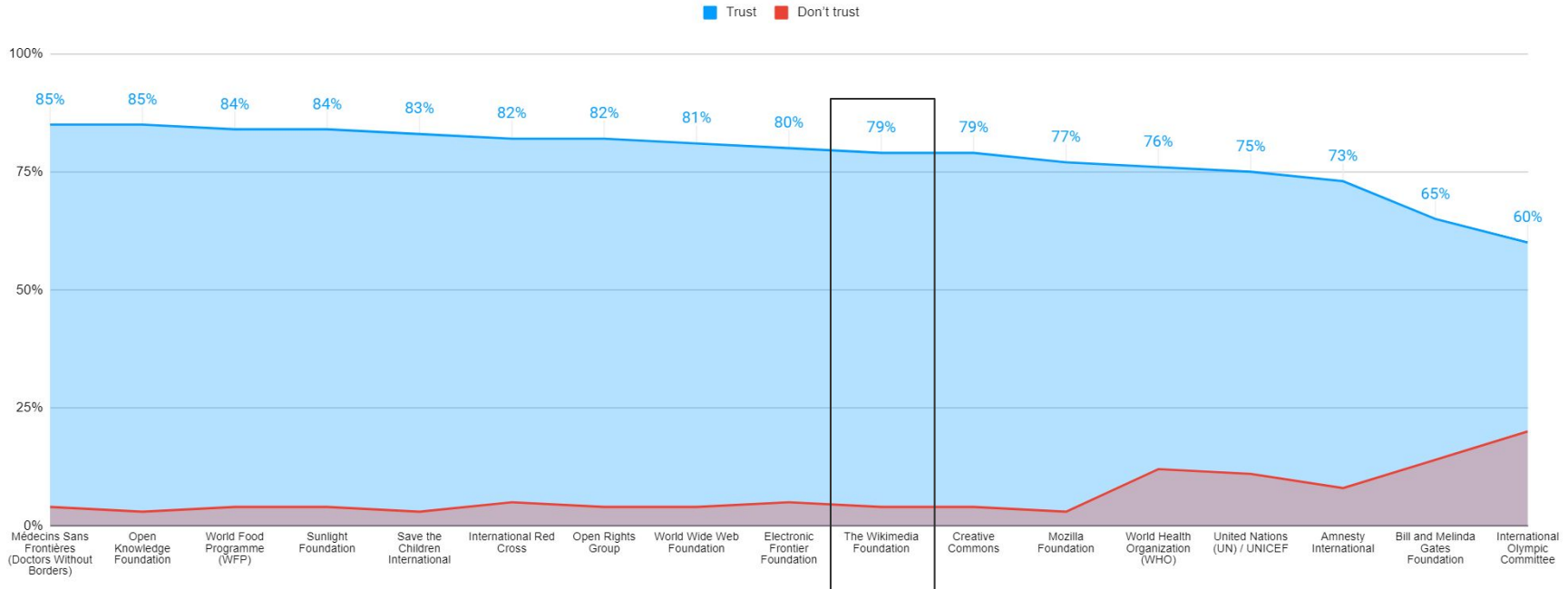
% respondents who expressed positive vs negative feeling for WMF and other non-profits



WMF also has good levels of trust among those who are aware

Trust for Wikimedia Foundation vs other non-profits

% respondents who state they trust each organization (top 2 box)

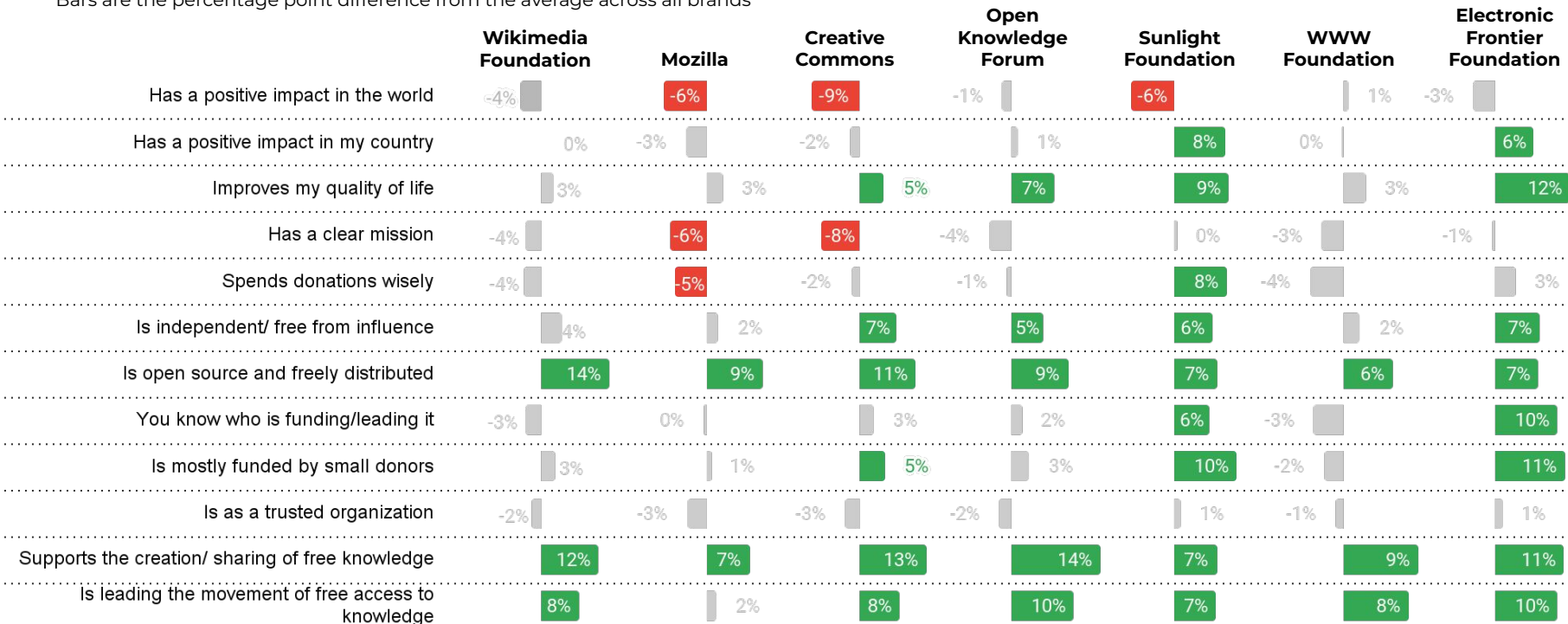


For those aware, WMF seen as open source & free, and supports free knowledge movement

WMF more positively perceived in IN, ID, NG (see appendix)

Brand attributes associated with each non-profit organizations

Bars are the percentage point difference from the average across all brands

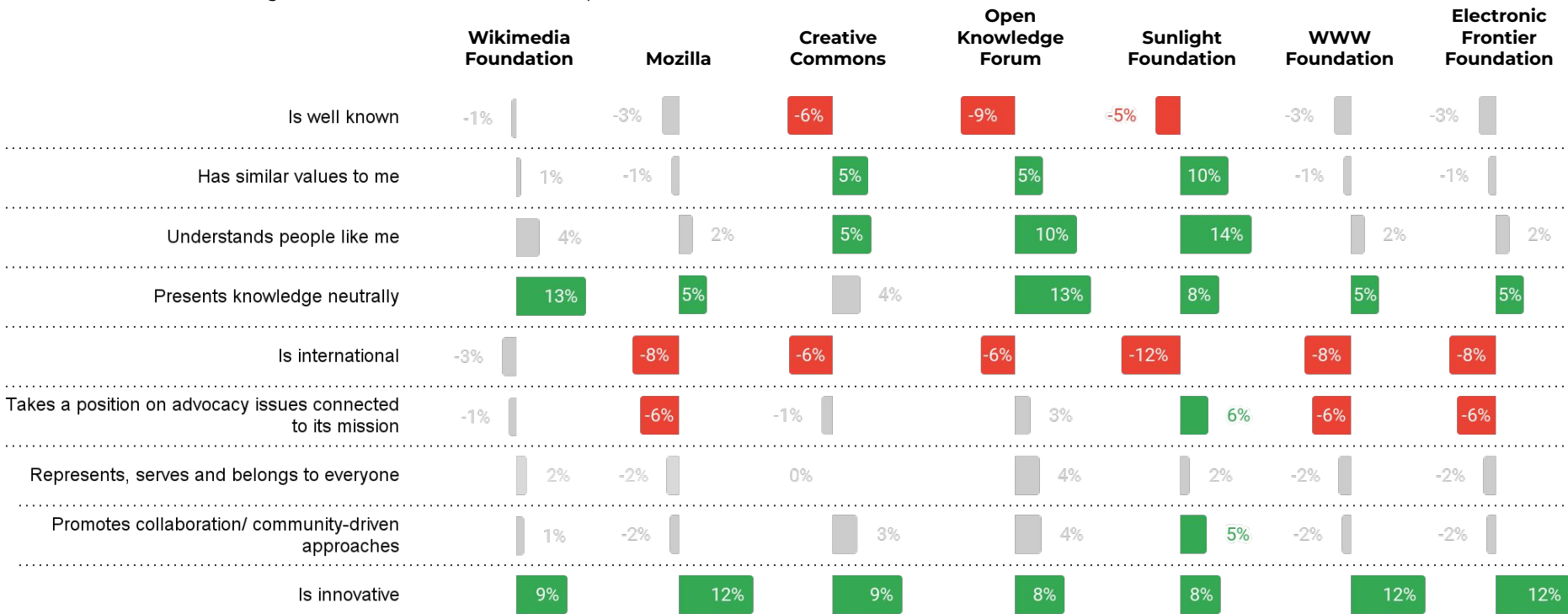


For those aware, WMF perceived as more neutral vs. other orgs

WMF more positively perceived in IN, ID, NG (see appendix)

Brand values associated with each non-profit organizations

% difference from average for each brand value across non-profits



04

**Wikipedia
Brand Health**

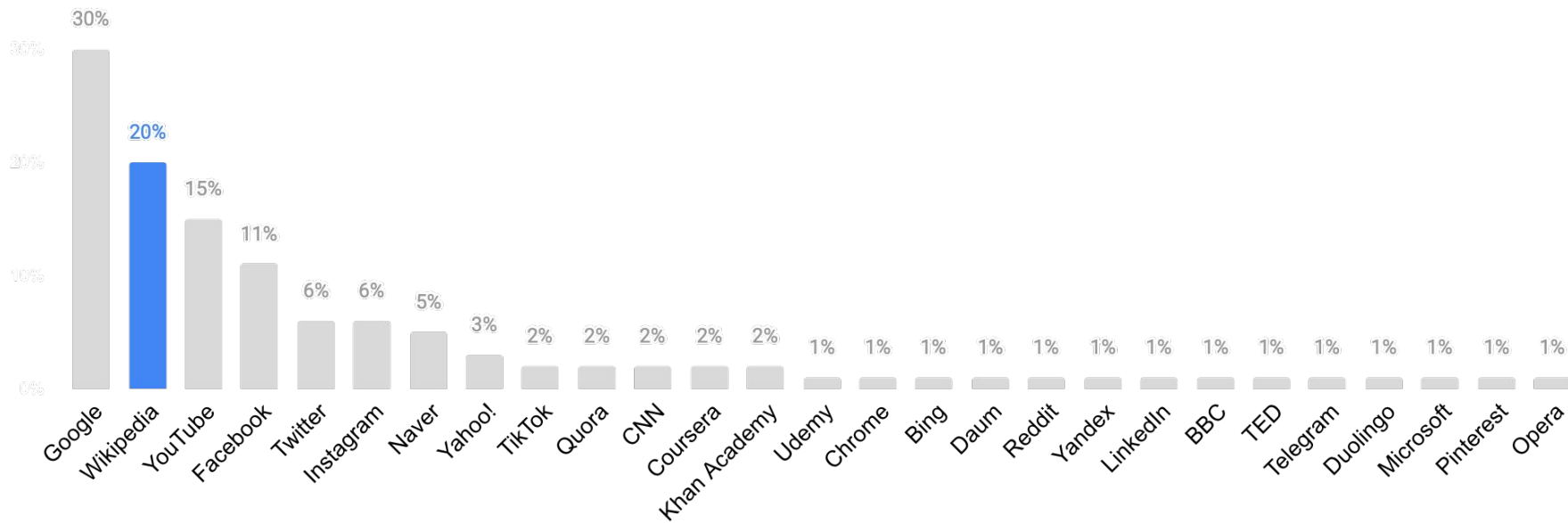
Presence

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

Wikipedia enjoys a good level of top of mind/salience vs other sites/apps

Unaided awareness of websites or apps that provide free knowledge

% stating each of the following (unprompted)

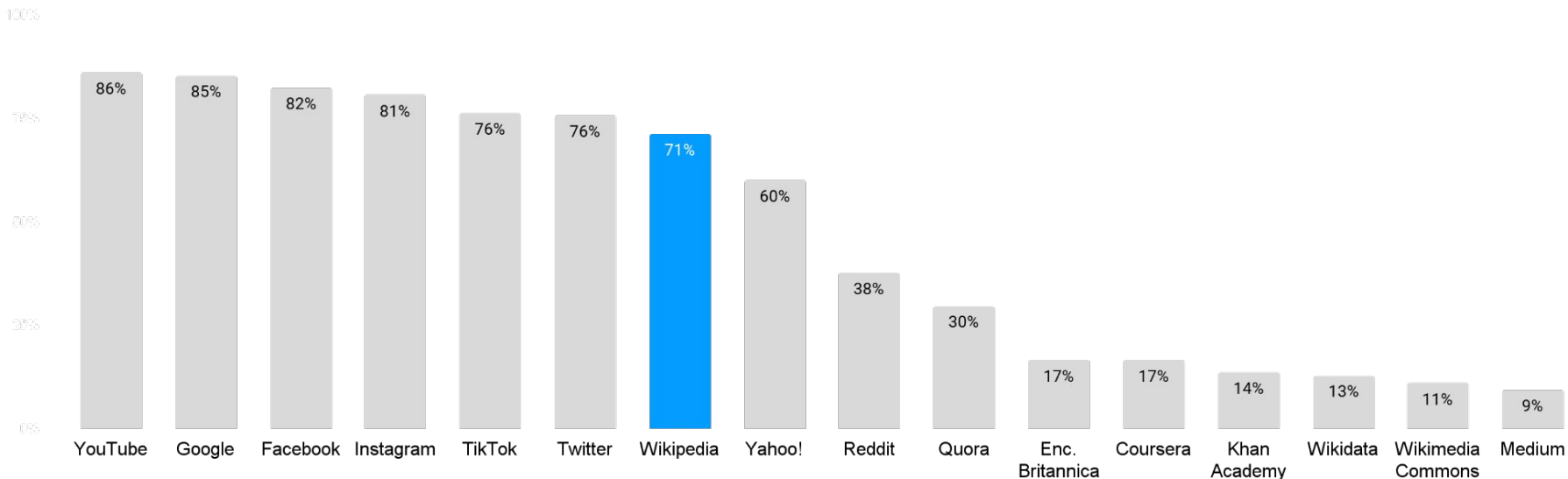


Relative to other sites/apps, Wikipedia has a good presence in the world - this will be helping to drive brand salience

People see Wikipedia most in search results, online in general, and on social media (see appendix)

Brand exposure for Wikipedia vs other competing brands/platforms

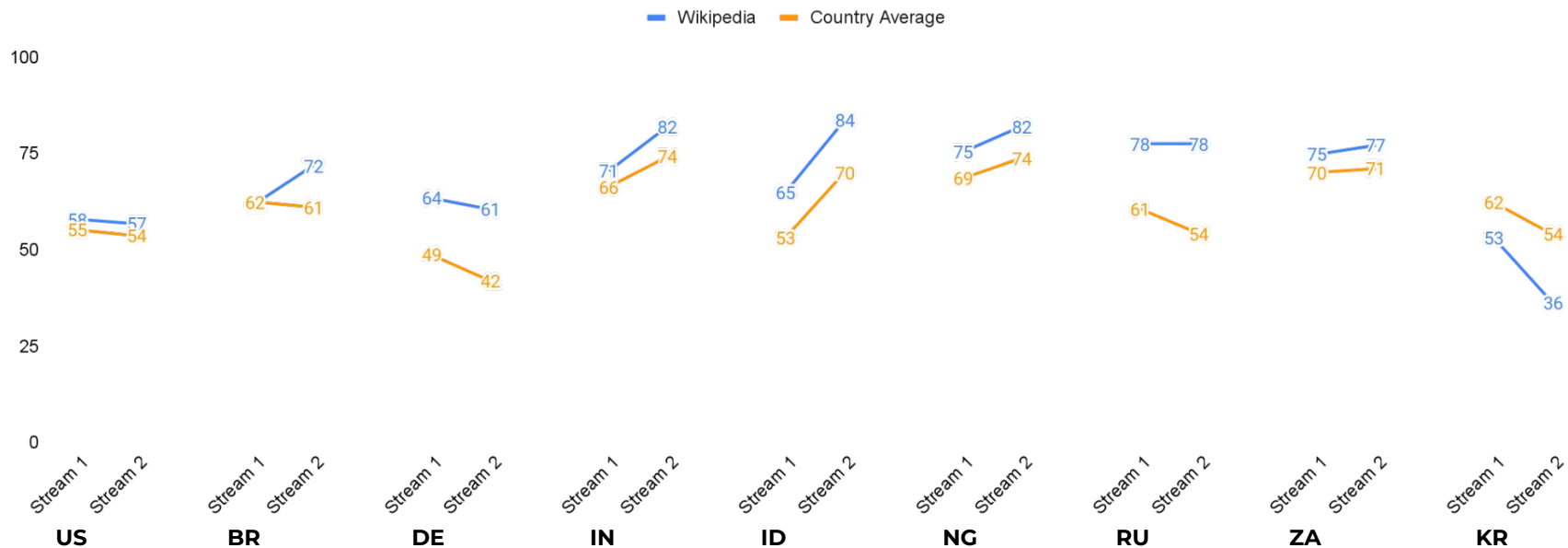
% brand exposure for Wikipedia and other brands (people who have seen the brand recently in any medium)



Wikipedia's presence growing most in ID, IN, NG who may be increasingly accessing the web; presence flat/down in US, DE, RU

Brand exposure for Wikipedia vs other competing brands/platforms

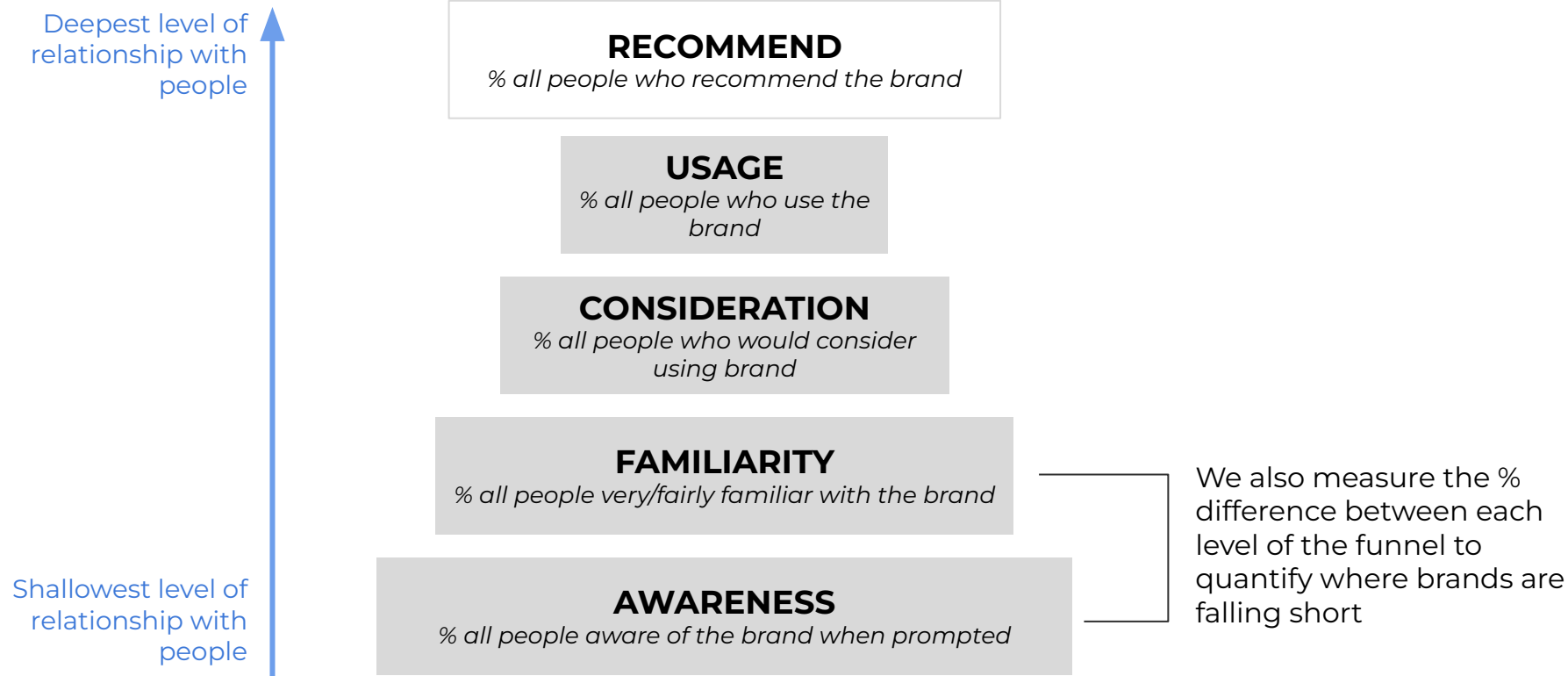
% brand exposure for Wikipedia and other brands (people who have seen the brand recently in any medium)



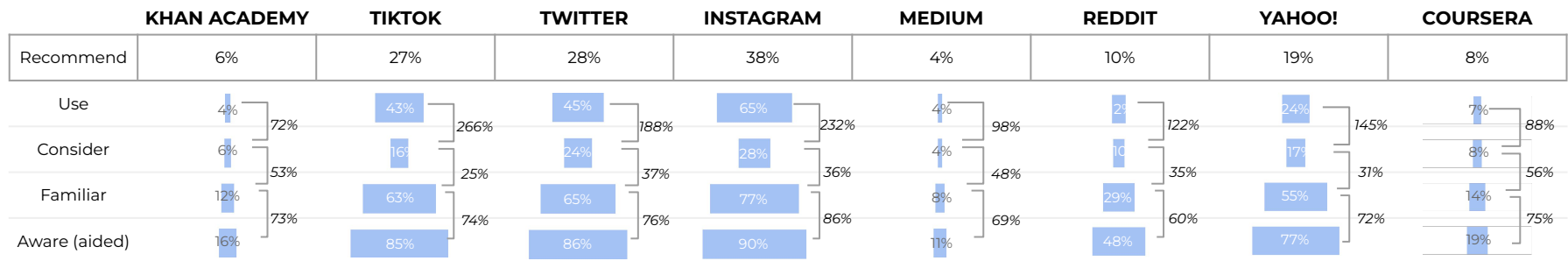
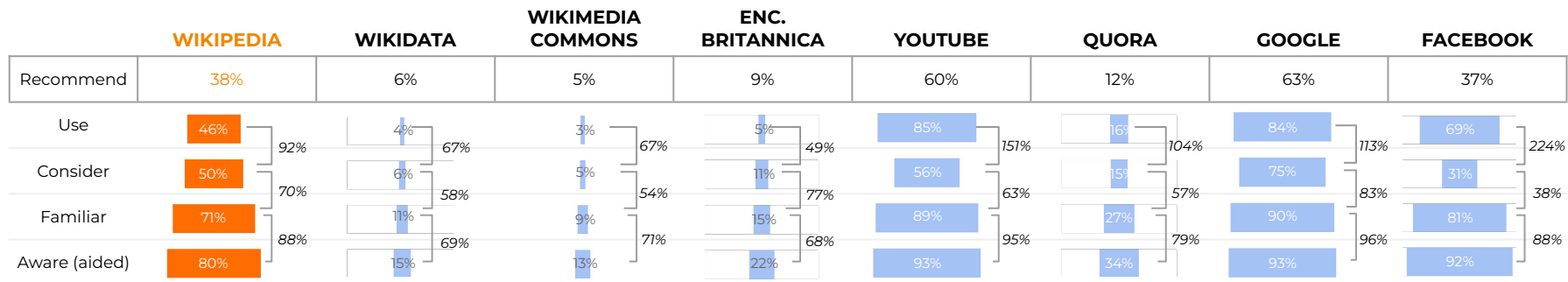
Persuasion

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

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



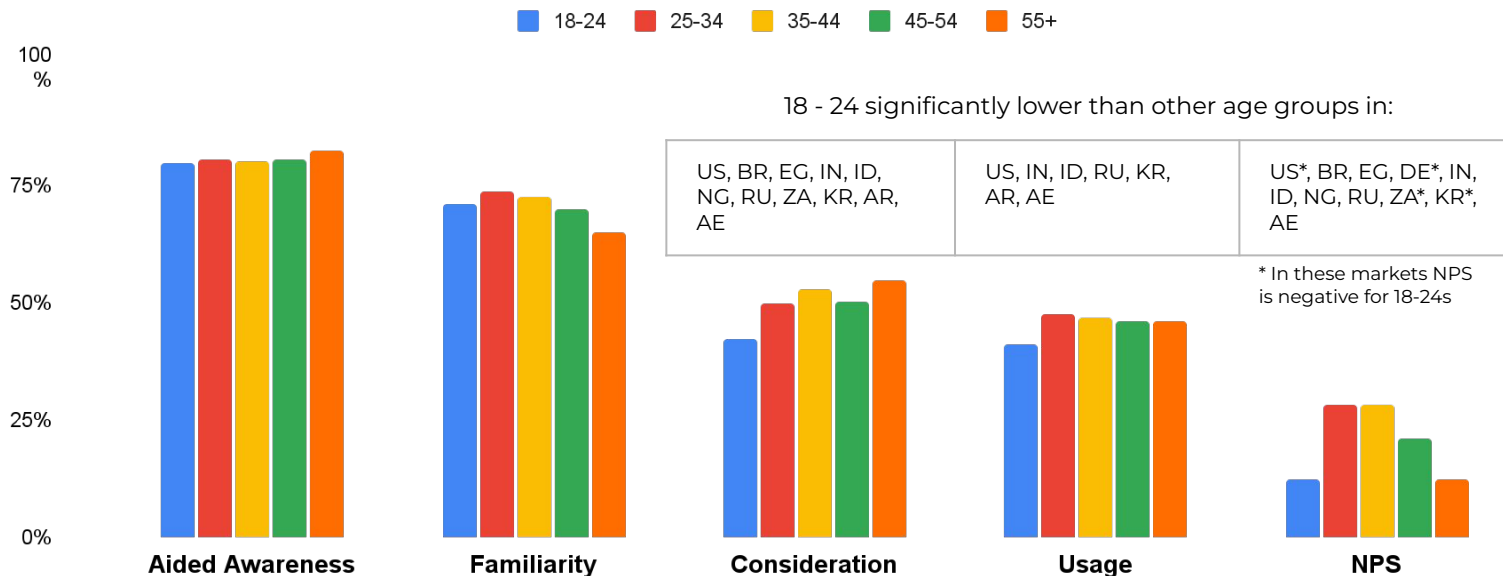
Wikipedia has a healthy brand, especially compared to many of its main competitors - good awareness, which converts well to usage



Though awareness consistent across age groups, consideration, usage and NPS lower for 18-24 year olds

Key Brand Metrics for Wikipedia by age groups

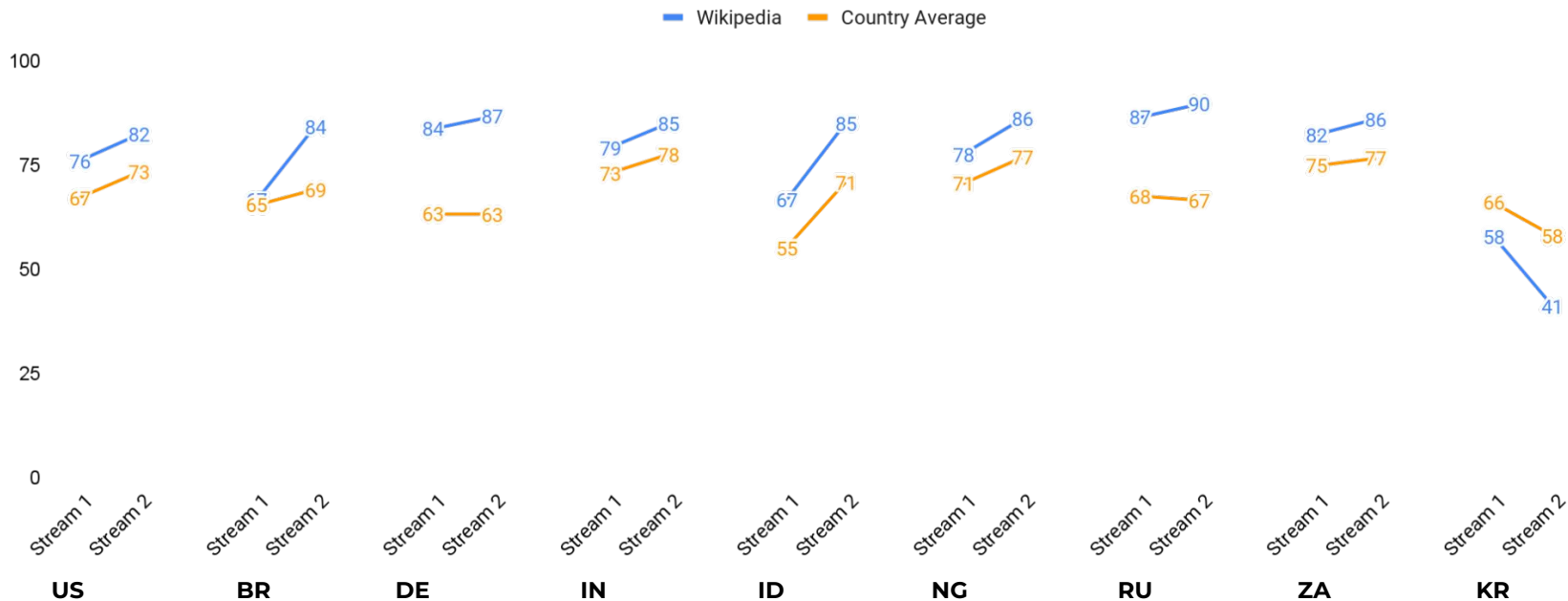
Awareness, familiarity, consideration, usage and NPS by age



All countries have seen improvement in Wikipedia awareness vs Stream 1, with the exception of KR

Brand awareness for Wikipedia vs competition across markets

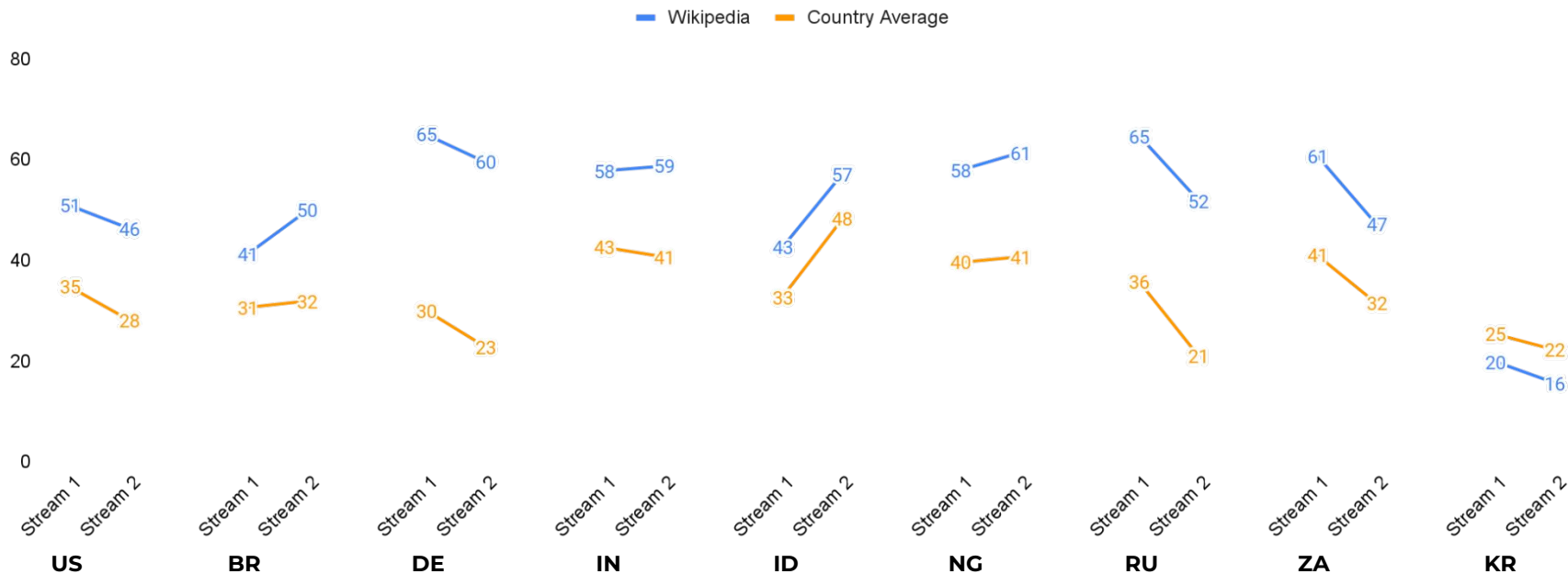
Aided brand awareness (%) for Wikipedia and competing brands across markets



However, Wikipedia consideration is down in US, DE, RU, ZA and KR (note this mainly driven by falling interest among young people)

Consideration for Wikipedia vs average

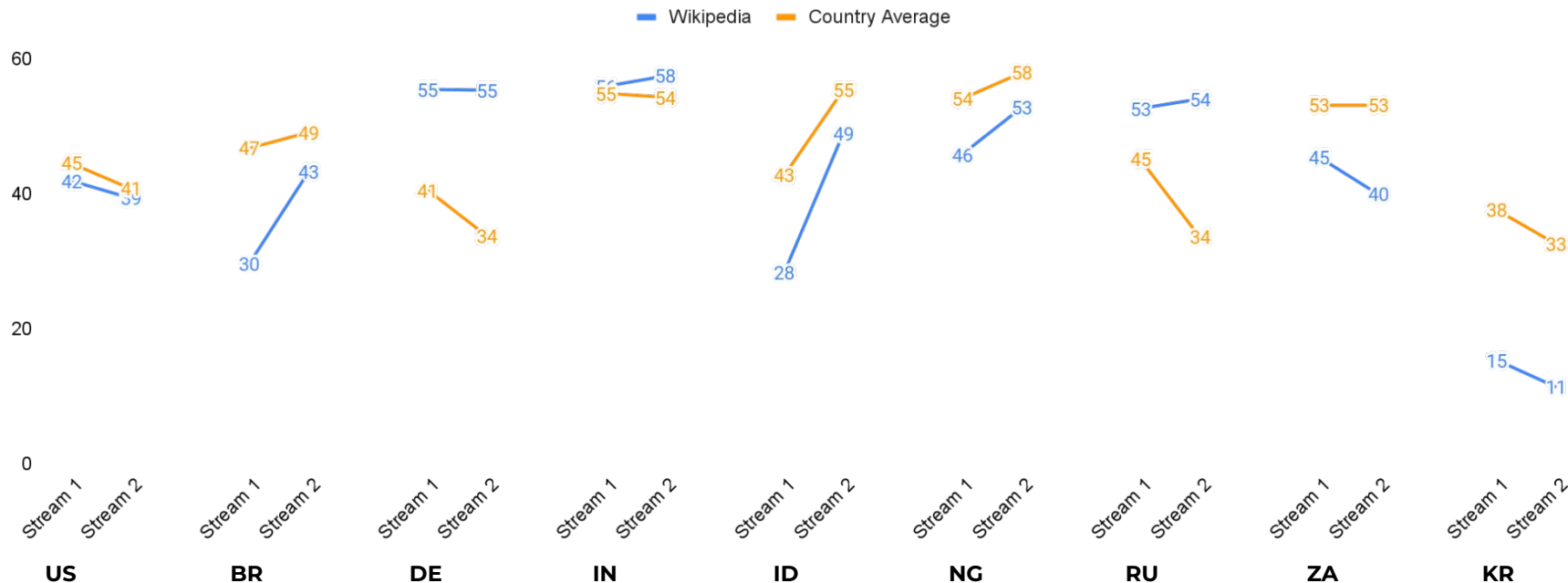
% stating they would consider using for information or knowledge in the future



Wikipedia usage down in US, ZA, KR - again, suggests potentially focusing on US, ZA to stem the flow (KR may be too different to focus on)

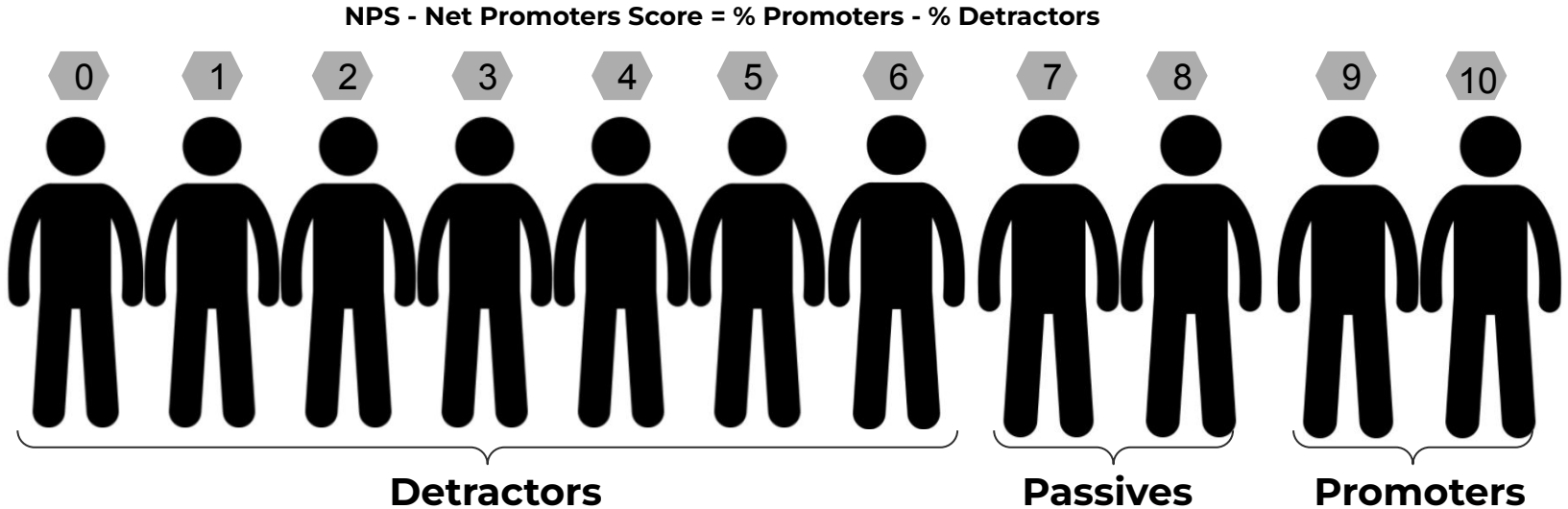
Usage for Wikipedia vs average

% stating they use the following platforms



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

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

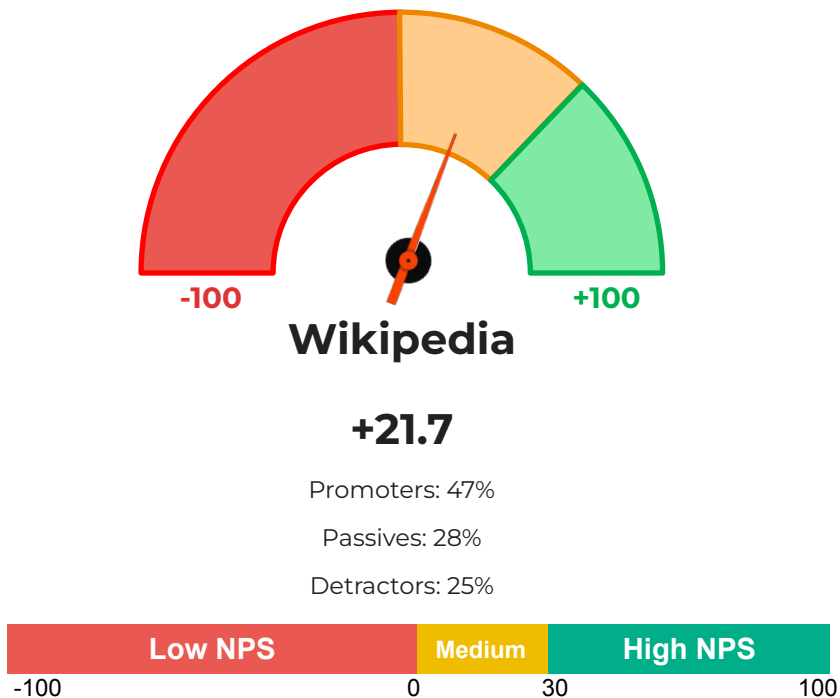


Base: Respondents aware of each brand.

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

Wikipedia has a strong advocacy relative to most other sites

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



Google +56.5 (68% / 21% / 11%)	YouTube +51.8 (64% / 24% / 12%)	Coursera +12.4 (41% / 30% / 29%)
Instagram +10.8 (42% / 26% / 31%)	Enc. Britannica Online +9.4 (40% / 29% / 31%)	Facebook +5.6 (40% / 25% / 35%)
Wikimedia Commons +5.5 (38% / 29% / 33%)	Khan Academy +5.4 (38% / 29% / 33%)	Wikidata +3.6 (37% / 29% / 34%)
Quora 0.0 (35% / 31% / 35%)	Medium -2.8 (34% / 30% / 37%)	Twitter -10.8 (32% / 25% / 48%)
TikTok -16.8 (31% / 21% / 48%)	Yahoo! -26.0 (24% / 25% / 50%)	Reddit -31.0 (21% / 26% / 53%)

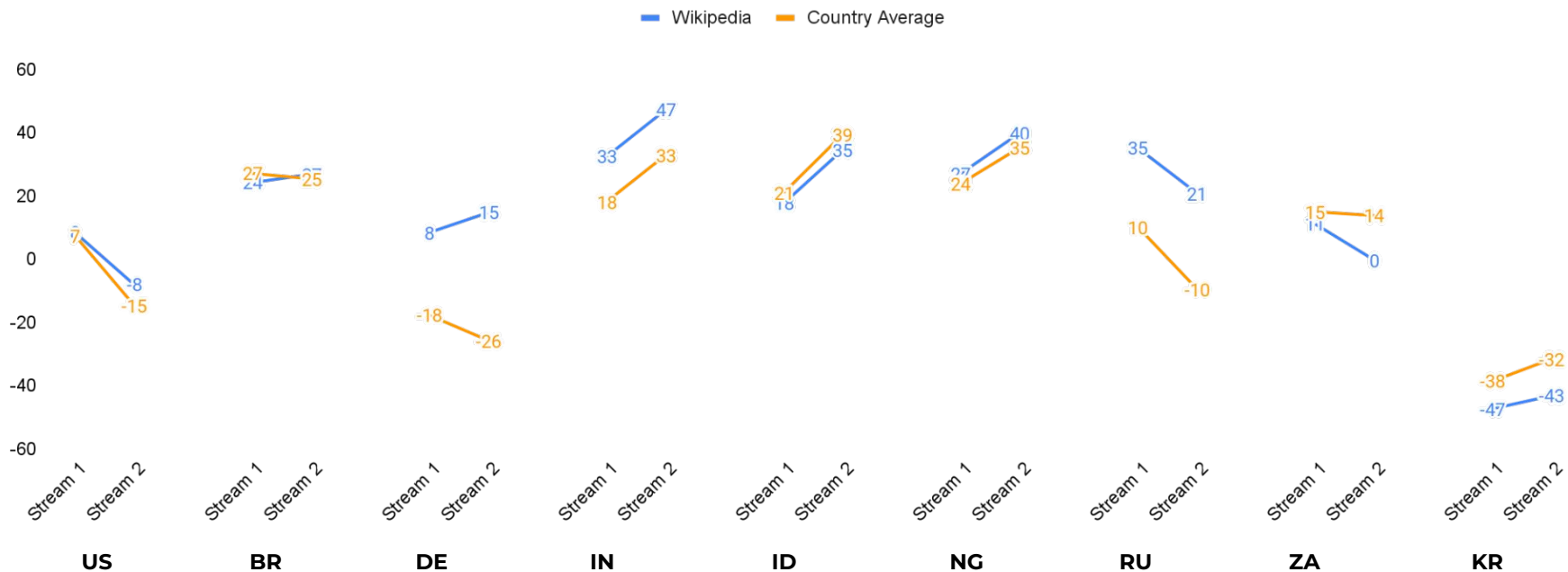
Base: Respondents aware of each brand.

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

NPS falling in US, RU, ZA - in the the US & RU this looks like a market issue (other brands' NPS down too); in ZA more a Wikipedia issue

NPS for Wikipedia vs average

NPS score by market



Proposition & Purpose

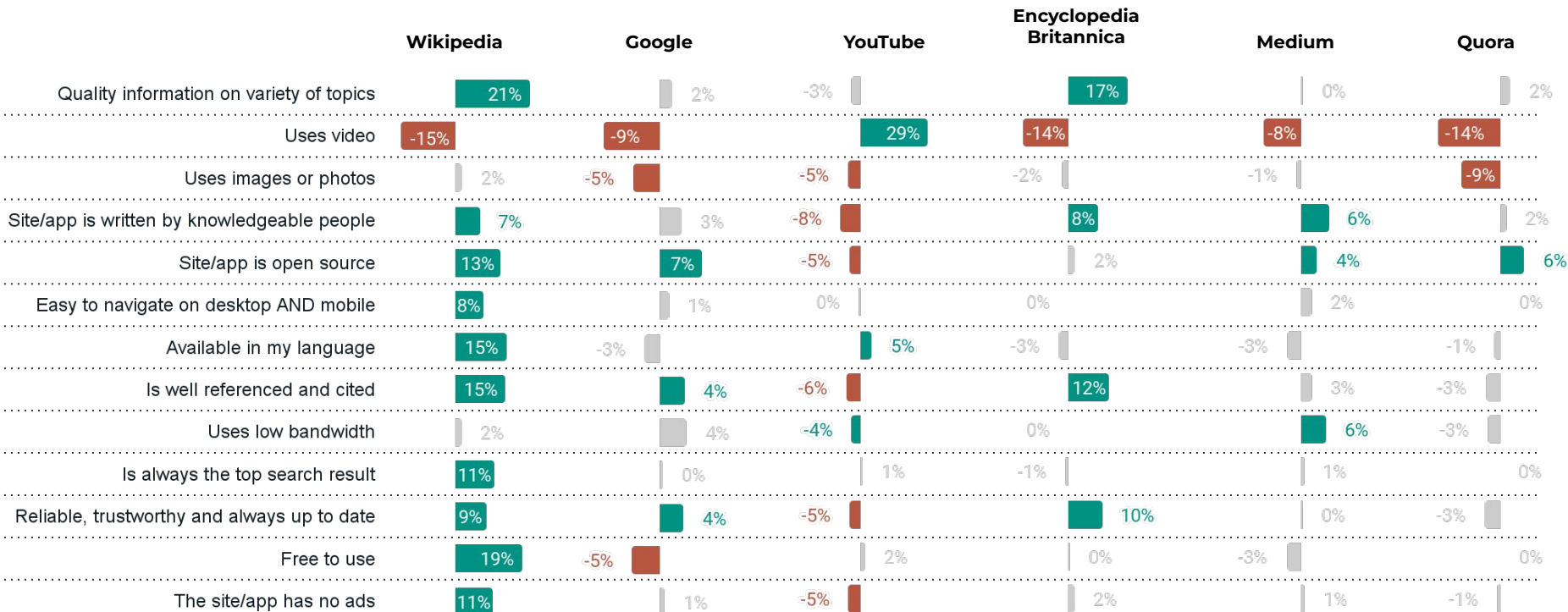
What people associate with the brand and its competitors

Overall Wikipedia perceived well, though associated with lack of video

WMF more positively perceived in IN, ID, NG; less positively perceived in US, BR, ZA and KR (see appendix)

Brand attributes associated with each website/app

Degree of importance of brand attributes for each website/app

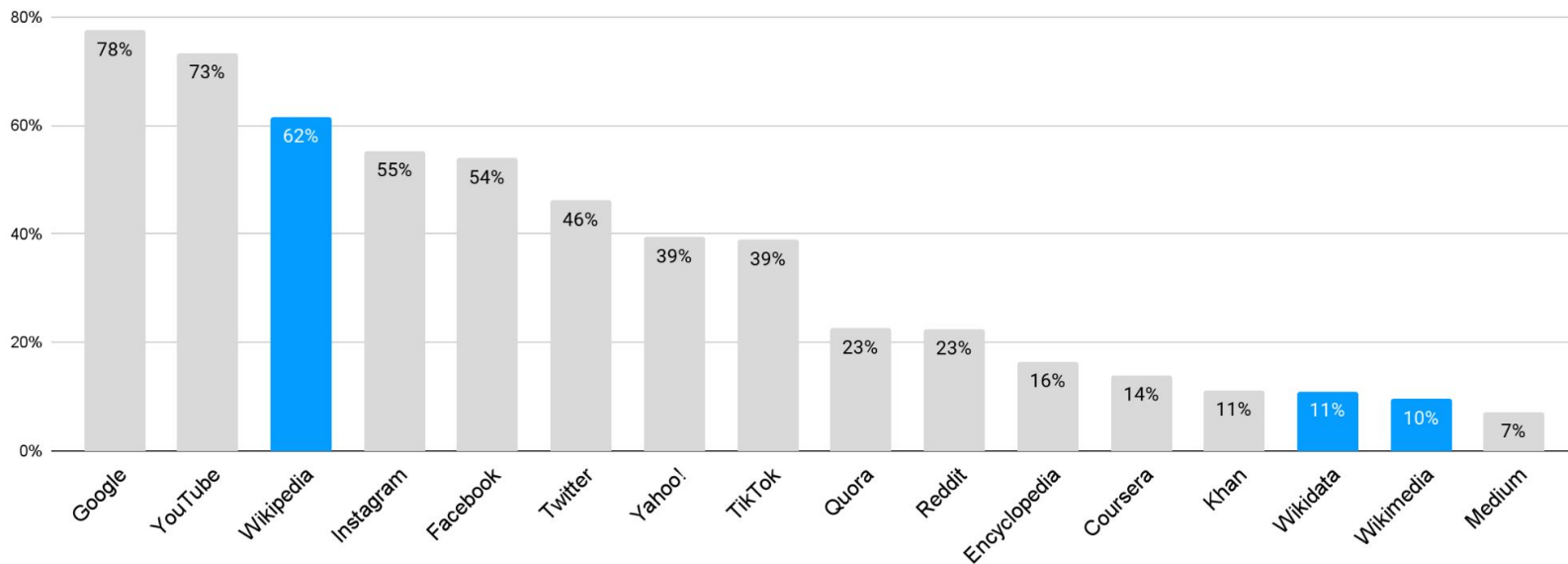


Wikipedia seen as very trustworthy; notable that people trust Google more, especially as Google pushes more content around search results

Wikipedia trusted across all countries with the exception of KR (see appendix)

Brand Trust by country

% of respondents indicating how much they trust each website/app to be honest and unbiased

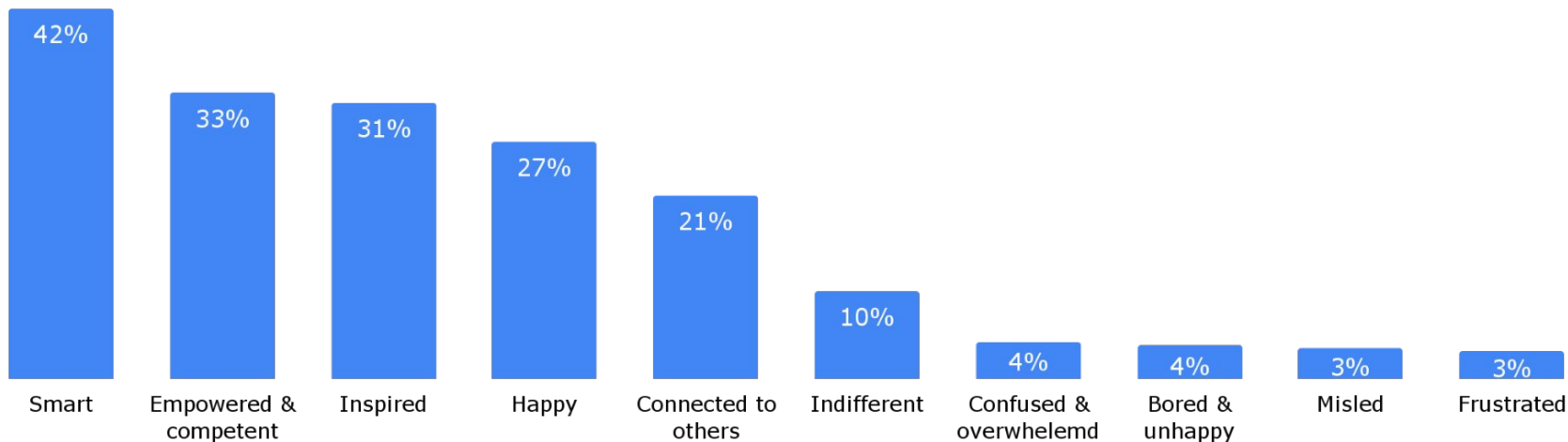


Users of Wikipedia most likely to feel smart when using the platform

Most positive emotional associations with Wikipedia in IN & ID (in [appendix](#));

Emotional feelings with brands

Varied emotional feelings with Wikipedia and other competing brands



Usage: Deeper Dive

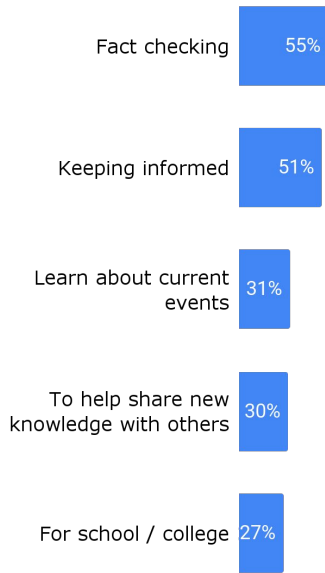
Deeper dive into how people are using
Wikipedia

Appearing in search results is most common way of finding Wikipedia

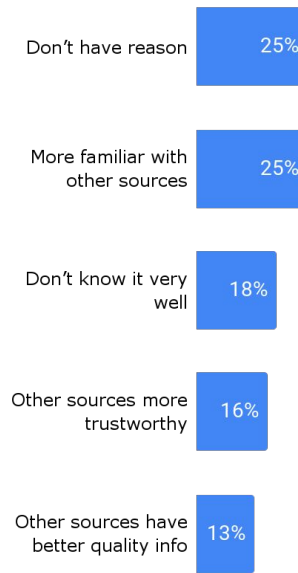
Findability



Usage Drivers (top 5)



Usage Barriers (top 5)



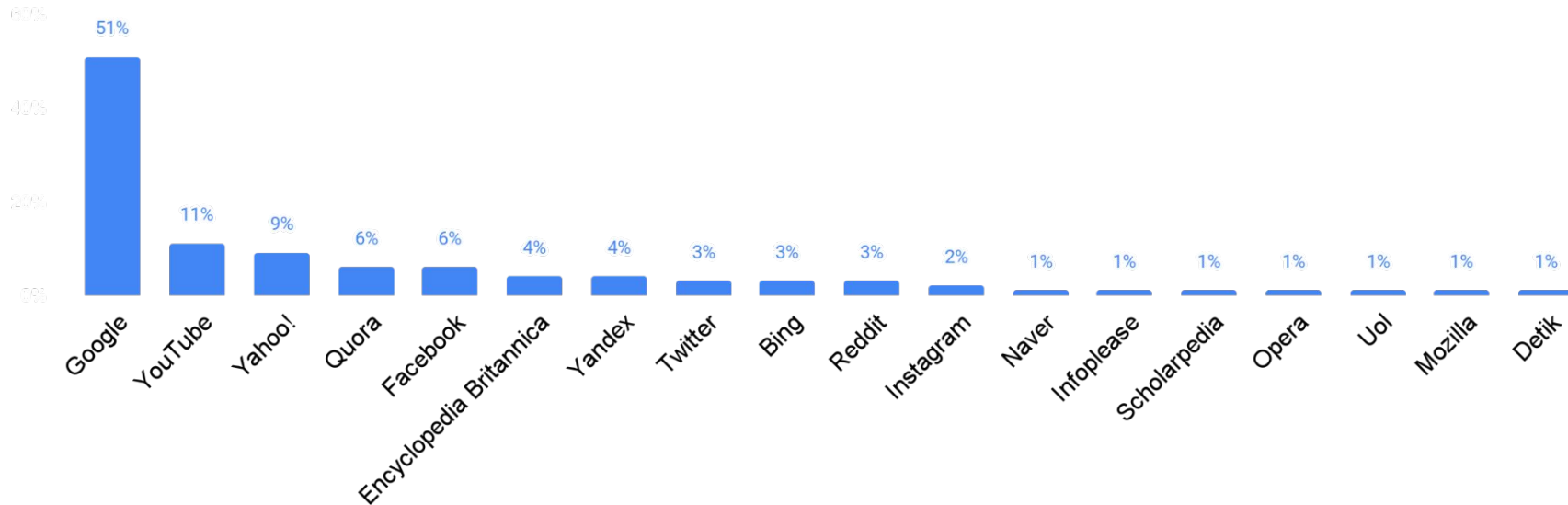
Improvements (top 5)



Wikipedia users would revert to Googling if Wikipedia didn't exist - points to the threat of Google

Sites/apps people would use instead

Unprompted movements across all countries, top 20, number of mentions of each movement





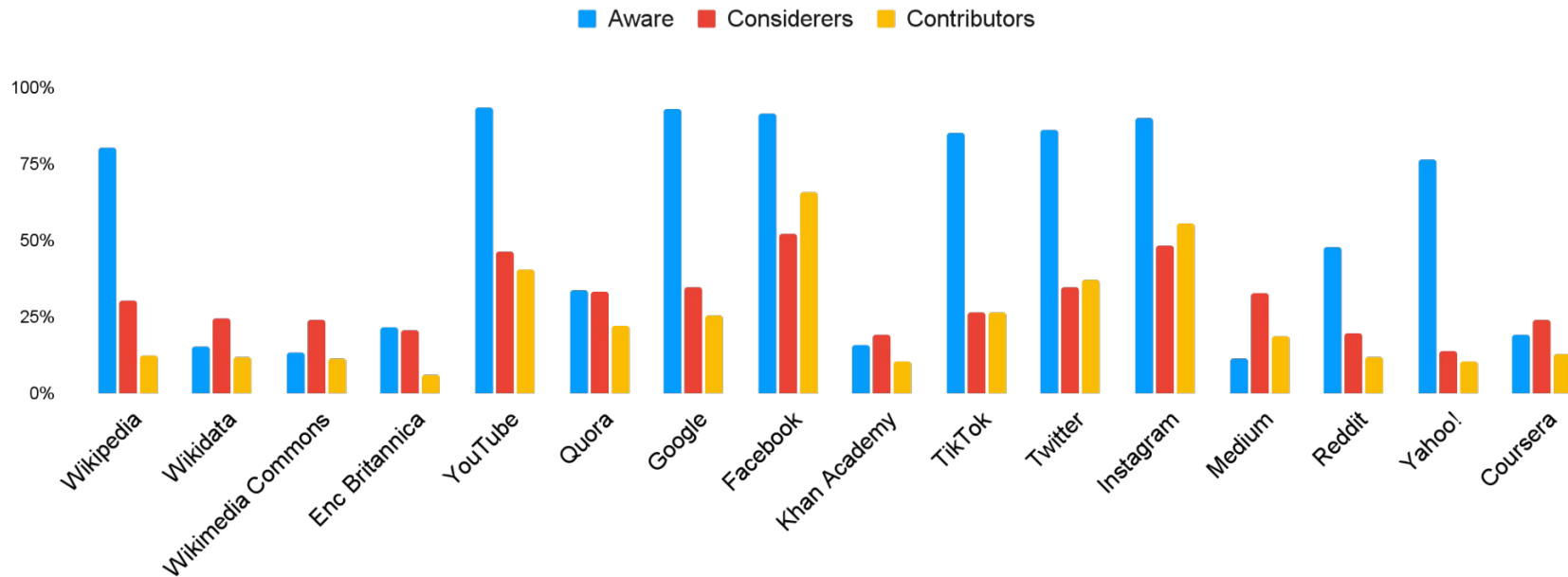
Editing

People's interest in editing

Wikipedia has a relatively low level of editors given its awareness level, suggesting an opportunity to grow communities

Editors/contributors and considers 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

Q4: Which of the following organizations or non-profits have you HEARD of?

CONSIDERERS TO EDIT/CONTRIBUTE

Base: Respondents aware of each platform

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

CONTRIBUTORS

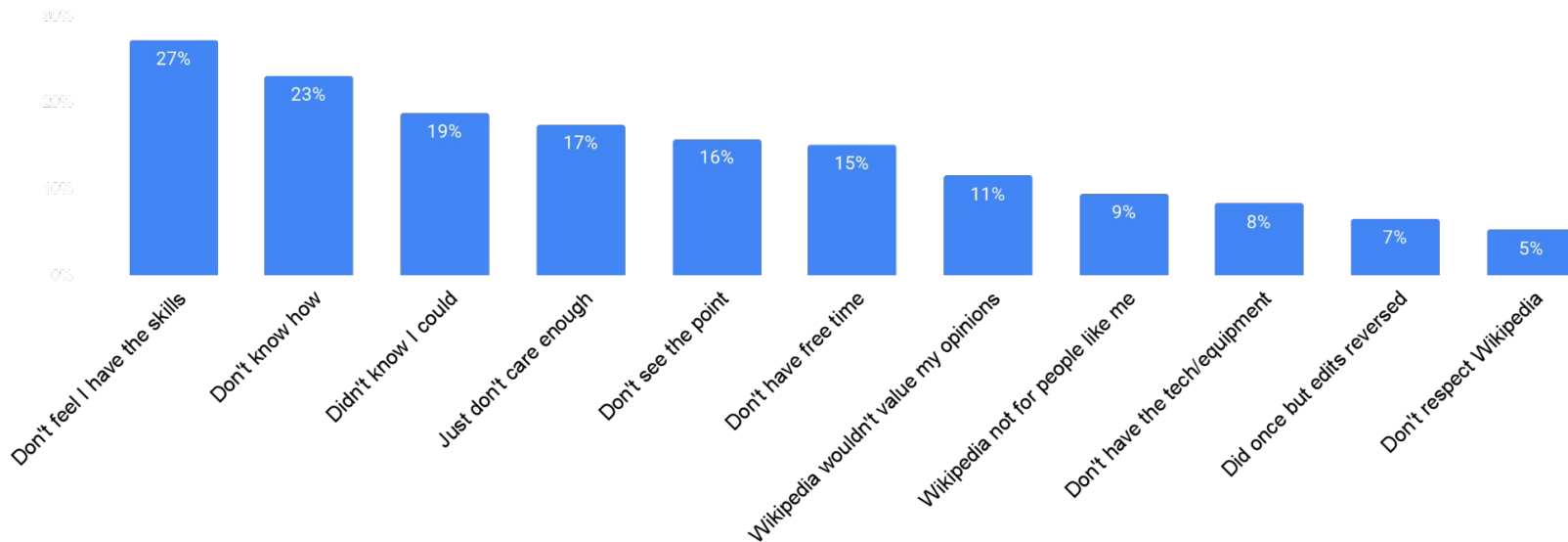
Base: Respondents aware of each platform

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

Lack of confidence in having the right skills & lack of knowledge about how to are biggest barriers - suggests an education job to be done

Barriers to editing/ contributing to Wikipedia

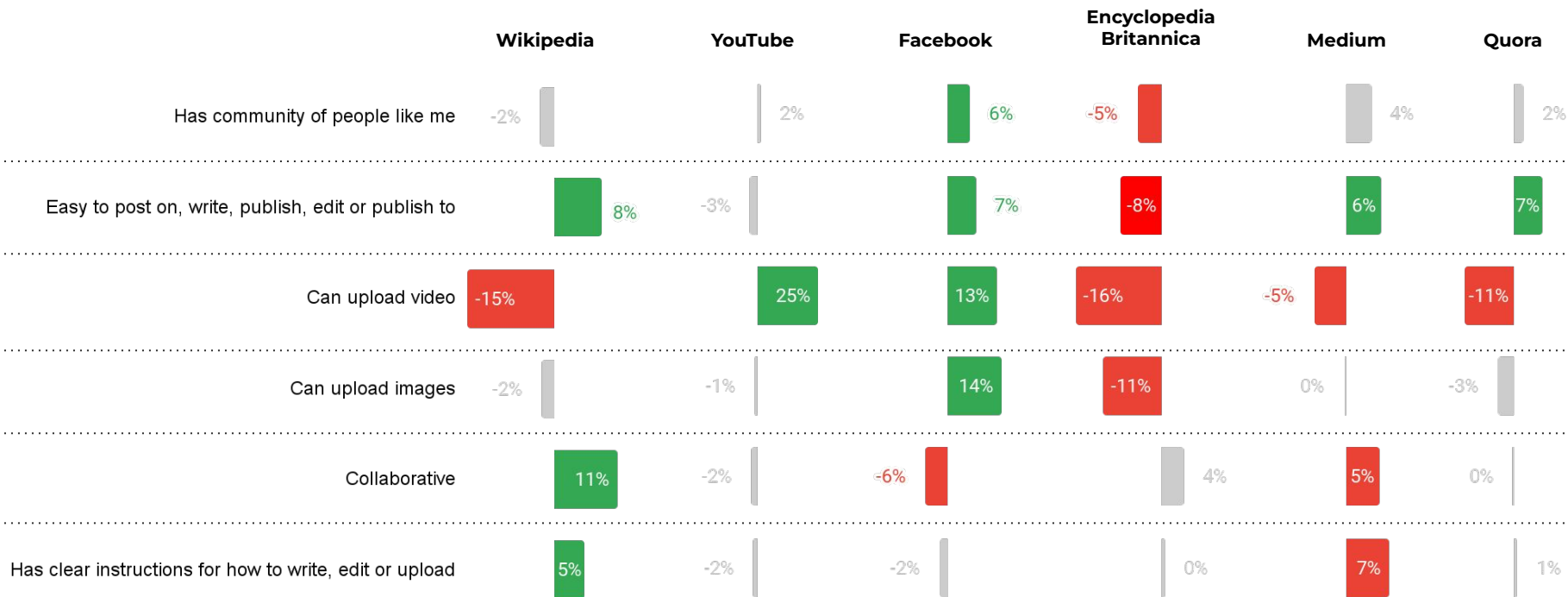
Overall barriers to editing/ contributing, or publishing anything on Wikipedia



Wikipedia not seen as a place to upload video, which may be a barrier too

Perceptions to editing/ contributing to knowledge and information sites/apps

Perceptions to editing/ contributing to knowledge and information sites/apps





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