



Wikipedia
Awareness, Attitudes
& Usage Research
JAPAN

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.



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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 people in high-awareness countries and regions and low-awareness countries and 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 countries and 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, Ipad, 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 Japan 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 Japan between the ages of 13 and 49 are fifteen times more likely to think of Google, and nine times more likely to think of Yahoo!, over Wikipedia when they “think about finding information online.” Fifty-eight mentioned Google vs. Yahoo! (45%) and Wikipedia (5%).

Close to two-thirds of Generation Z internet users are aware of Wikipedia, yet they are two times as likely to say that YouTube (59%) is one of top three sites that they go to when they want to find information than Wikipedia (31%).

Few Japanese GenZ readers first found out about Wikipedia at school, and regardless of the device they access it on, chances are they are doing homework. GenX, Y and Z have the highest rates of accessing Wikipedia on their smart phones. Tablets are practically non-existent, and PC and laptops are fading.

One of the most relevant findings of this research is the confusion surrounding Wikipedia. Almost 70% of GenZ internet users don't know it is a non-profit, 75% don't know how it is primarily funded and only one-third know that its content is created by volunteers.



Key Findings

In spite of the confusion, 63% of GenZ reads Wikipedia on a weekly basis, vs. 53% of GenX and 64% of GenY.

In Japan, GenX is about information seeking, GenY and GenZ are more likely to want to discover, and much of GenZ is doing their homework.

More than any other country, majorities navigate to Wikipedia by following regular search links led by GenX.

GenZ is changing this however, with a much higher propensity (about 25% each) to click on social media links, use the App, services like Siri, or have it set as their home page.

What readers find personally important is also what they most strongly associate Wikipedia with: being **useful, easy to read, and free**.

At the other end, transparency and comprehensive were the words least associated with Wikipedia, equally across the generations.

Free of advertising is ranked toward the bottom of personal importance; 7th or 8th out of nine.

Key Findings

Lastly, when it comes to enhancing Wikipedia readers' experience, all three generations agree that more trustworthy content (51% overall) and higher quality content (45% overall) would enhance it “a lot.”

Meanwhile, more GenZ readers would like to see improved readability (46%) and more neutral information (42%) than GenX readers (27% and 35%, respectively).

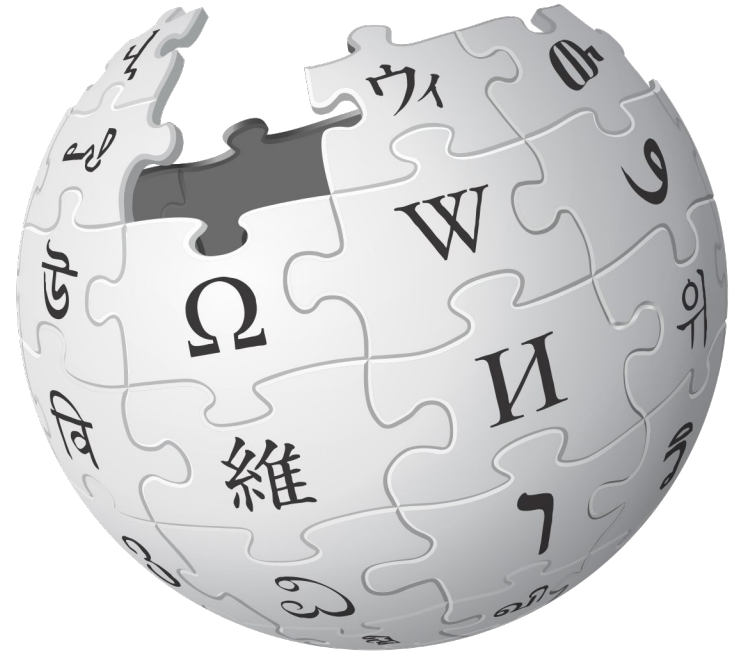
Thirty-five percent of GenZ say more visual content and improved local language content would enhance their personal experience “a lot.”

Of little or no importance to Wikipedia readers across the generations is more interaction with other readers (13% overall).



Wikipedia Awareness

Japan internet users by Generation
Total Base: 1150
Weighted Data



We asked internet users in Japan what website came to mind when they want to find information online.

49% mentioned Google first.

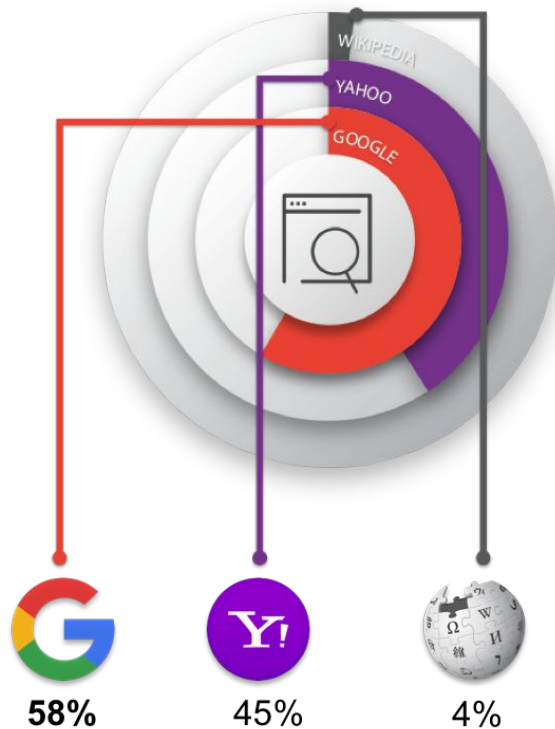
37% mentioned Yahoo! first.

3% mentioned Wikipedia first.



In total mentions, Yahoo! competes with Google in Japan.

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



In Japan 64% of internet users are aware of Wikipedia.

However only about three out of ten 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

One-third or less - across all three generations - include Wikipedia as one of the top three sites they go to when they want to find information online.

Almost three out of four GenX users still include Yahoo!, and 30% of GenZ include Twitter as one of their top three sites for information.

Forty percent of GenY and 59% GenZ include YouTube.

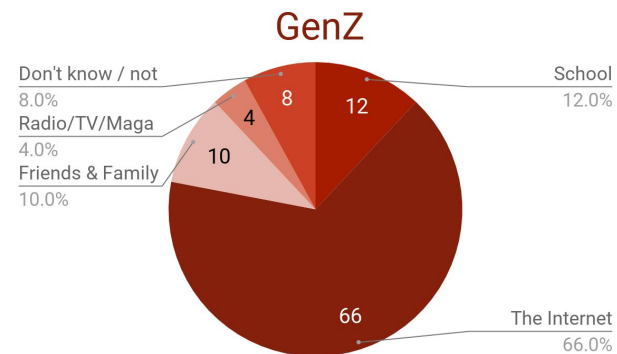
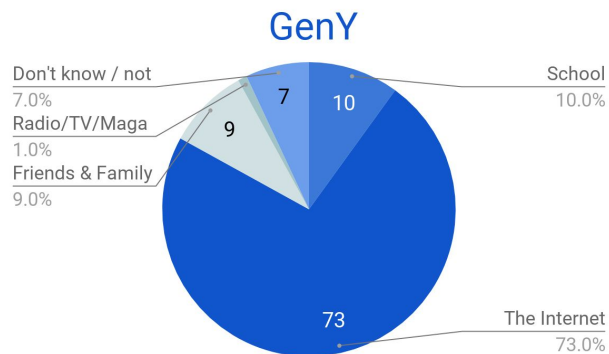
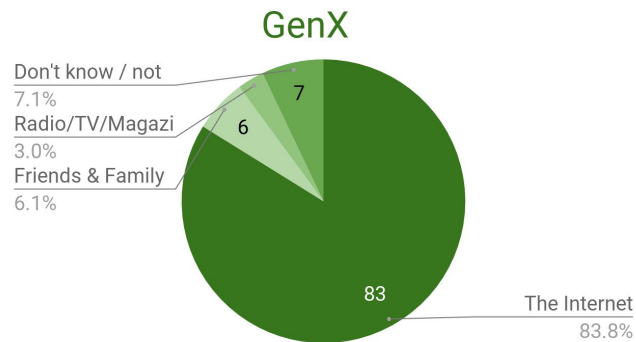
	<u>GenX</u>	<u>GenY</u>	<u>GenZ</u>
Google	76%	91%	79%
Yahoo!	73%	53%	34%
YouTube	30%	40%	59%
Wikipedia	25%	33%	31%
Ratuken	18%	16%	8%
Twitter	11%	19%	30%
Facebook	7%	6%	7%
Niconico	1%	4%	10%



Across generations in Japan, majorities first found out about Wikipedia on the internet. Only 12% of GenZ found out about it at school.

Q8: Where did you first find out about Wikipedia?

Base: 737 Aware Wikipedia.



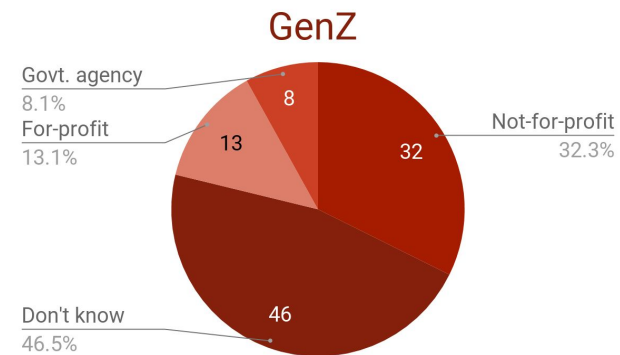
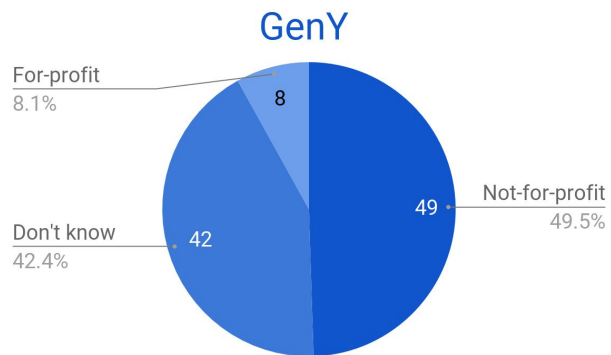
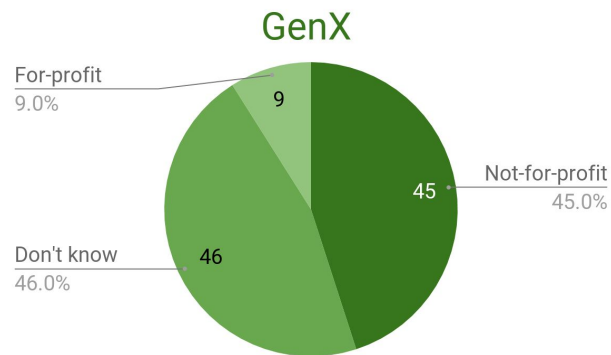
Many internet users in Japan remain confused about Wikipedia.

Almost 70% of GenZ internet users don't know it is a non-profit, 75% don't know how it is primarily funded and only one-third know that its content is created by volunteers.



Less than half of GenX and GenY internet users know it is a not-for-profit, while almost seven of ten GenZ “don’t know.”

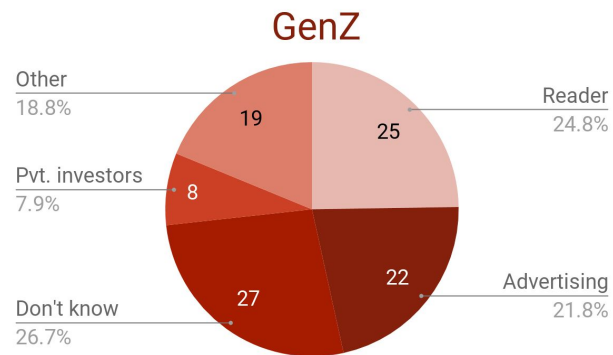
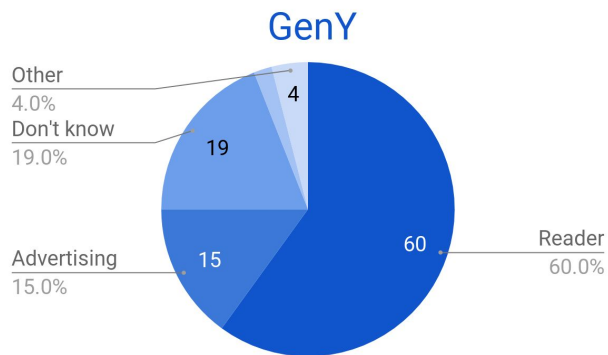
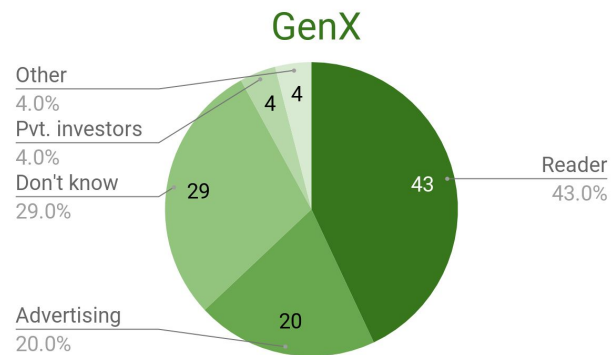
Q9: To the best of your knowledge, which of the following best describes the organization that manages Wikipedia? Base: 737 Aware Wikipedia.



Remarkably, 60% of GenY internet users know that Wikipedia is funded by readers, vs. 43% of GenX and just 25% of GenZ.

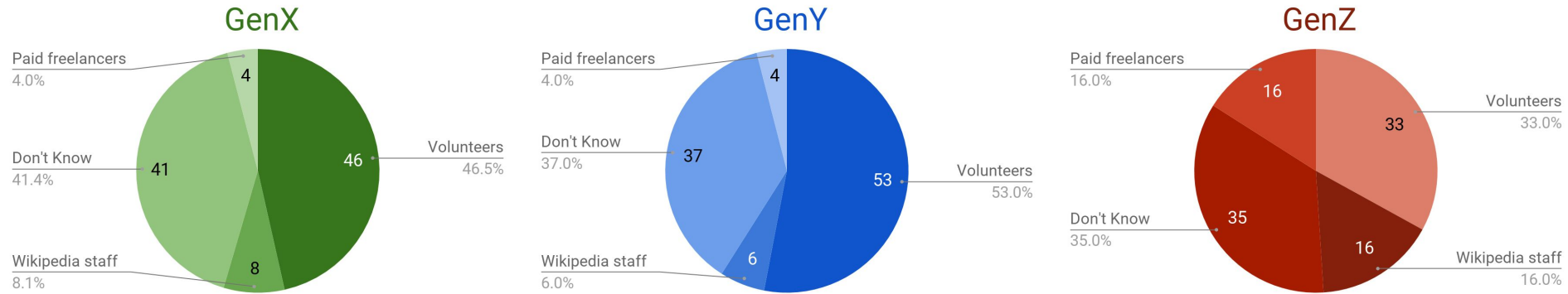
Q10: How do you think Wikipedia is primarily funded?

Base: 737 Aware Wikipedia.



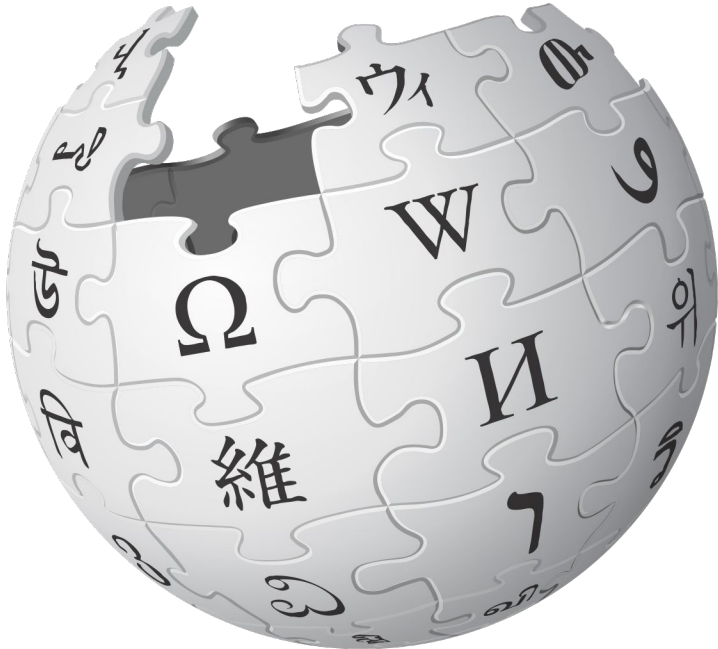
Only one-third of GenZ readers know content is created and maintained by volunteers (16% think it is staff).

Q17: To the best of your knowledge, how is information primarily created and maintained on Wikipedia? Base: 704 Wikipedia Readers.



Wikipedia Usage

Japan internet users by Generation
Total Base: 1150
Weighted Data



Awareness & Usage Summary

At 64% overall, awareness of Wikipedia in Japan is lower than any other country surveyed. This is largely due to low awareness among GenX internet users.

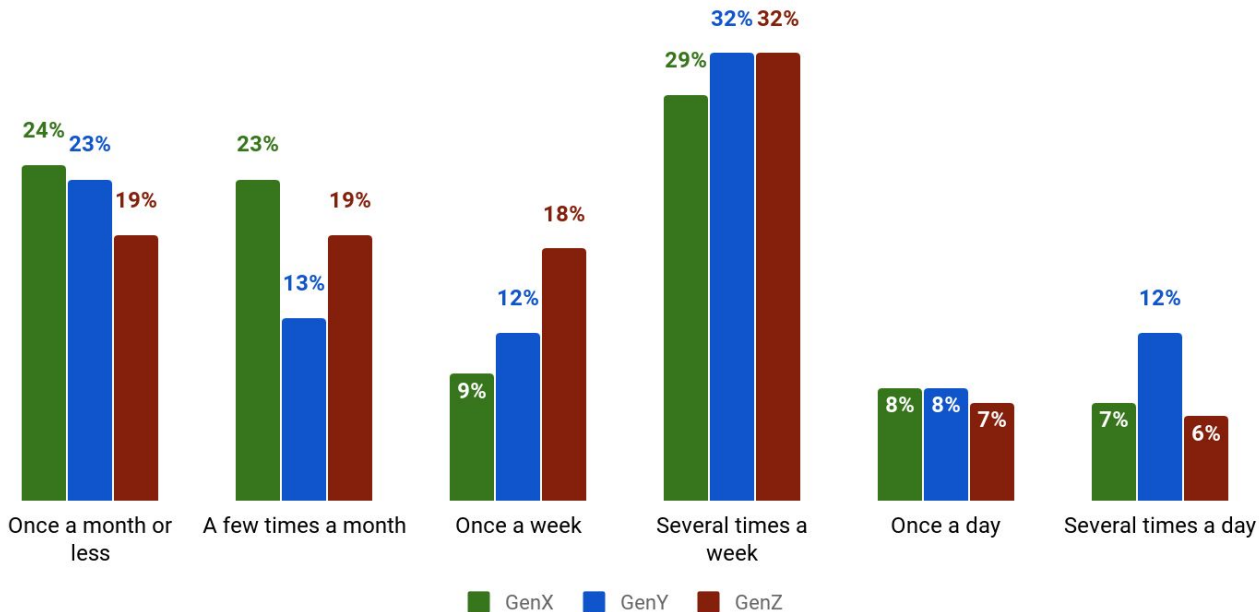
	<u>GenX</u>	<u>GenY</u>	<u>GenZ</u>
Aware of Wikipedia	59.9%	67.9%	67.0%
Read Wikipedia	57.1%	65.5%	62.0%
Never read Wikipedia	2.8%	2.4%	3.9%
Unaware of Wikipedia	40.1%	32.1%	33.0%
Total non-reading population	42.9%	34.5%	37.0%



63% of GenZ reads Wikipedia on a weekly basis, vs. 53% of GenX and 64% of GenY.

Q14: How often do you read Wikipedia?

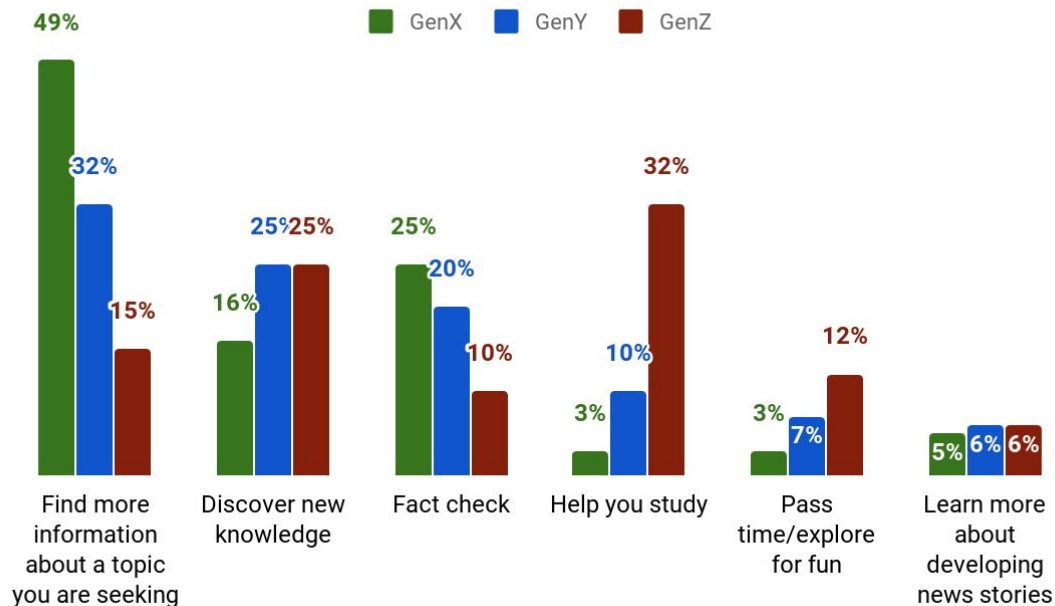
Base: 704 Wikipedia Readers.



GenX is about information seeking, GenY and GenZ are more likely to want to discover, and GenZ is doing their homework.

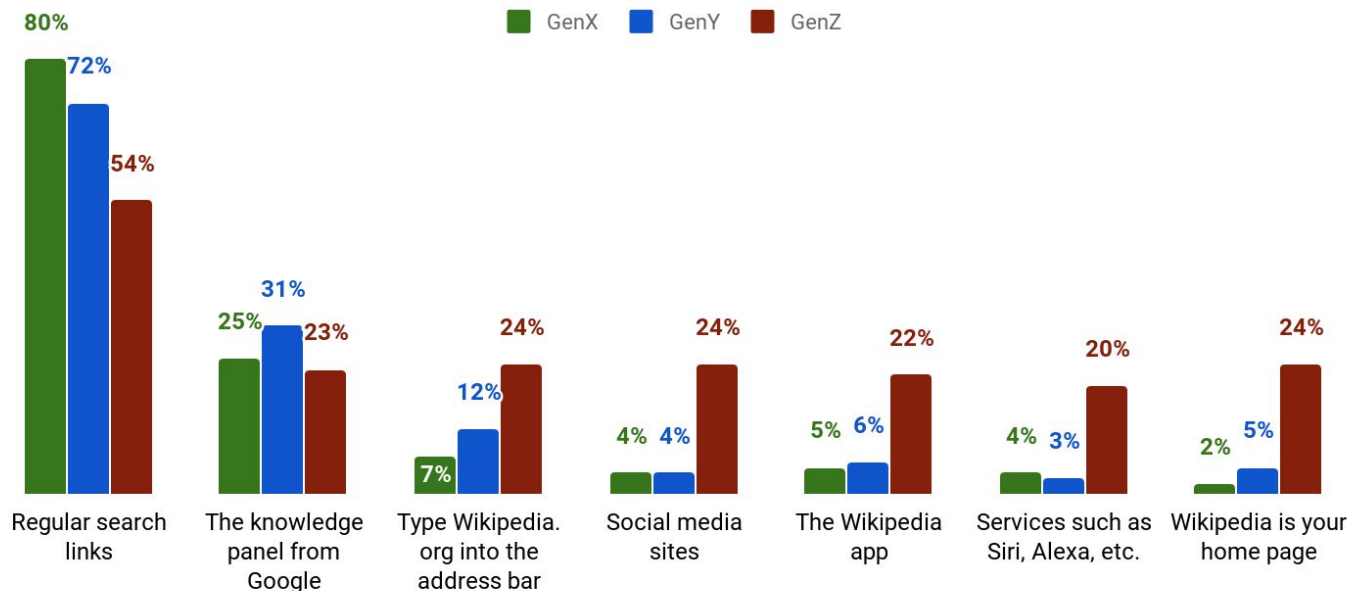
Q15b: Overall, would you say you use Wikipedia primarily to _____.

Base: 704 Wikipedia Readers.



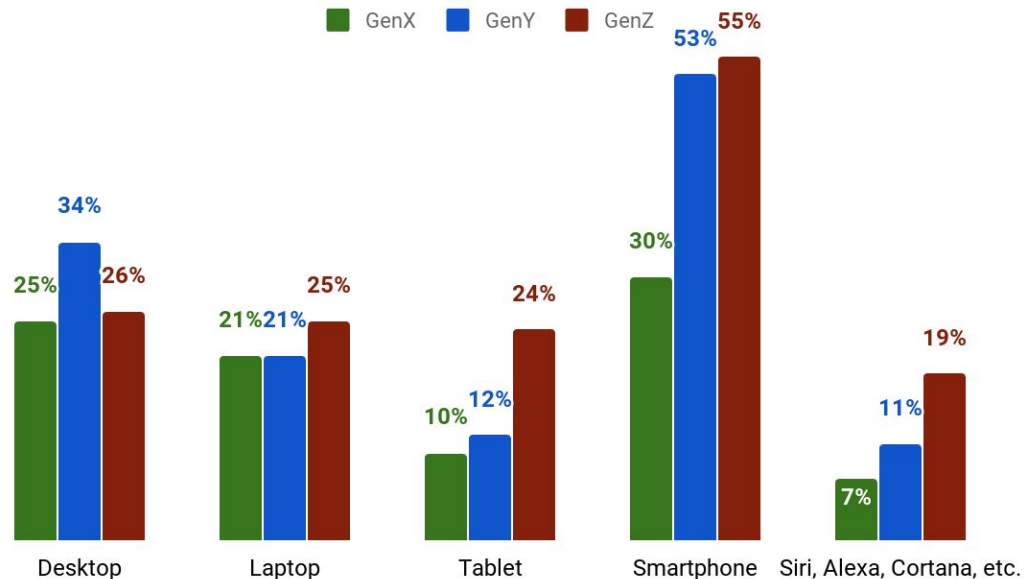
About a quarter of GenZ readers go directly to the site, through social media sites, uses the App, voice services, or has it as their home page.

Q16: What are all of the ways you find Wikipedia articles, or get to Wikipedia articles? (Answer all that apply) Base: 704 Wikipedia Readers








Japan is the only country in our survey where all three generations use smartphones more than any other device to access Wikipedia.

Q15: Please indicate how often you use each the following devices to access and read Wikipedia. Base: 704 Wikipedia Readers.



In Japan, **GenX** and **GenY** readers switch from researching on desktops or laptops, to “in-the-moment” conversational fact-checking on their smartphones. **GenZ** readers are focused on school work.

		GenX	GenY	GenZ
Desktop		A topic I want to learn more about 53%	A topic I want to learn more about 62%	Work or school assignment 48%
Laptop		A topic I want to learn more about 63%	A topic I want to learn more about 51%	Work or school assignment 49%
Tablet*				
Smartphone		To immediately look up a conversational topic 59%	To immediately look up a conversational topic 58%	Work or school assignment 48%
Digital Voice Asst.*				

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

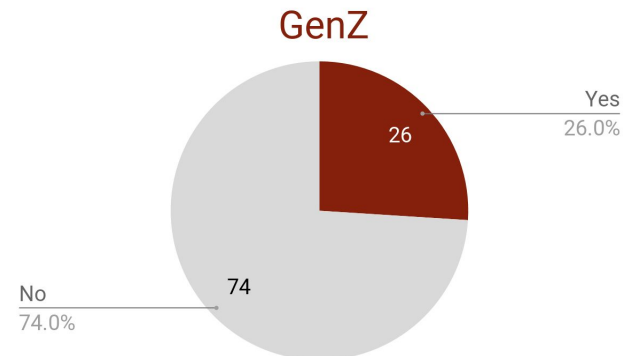
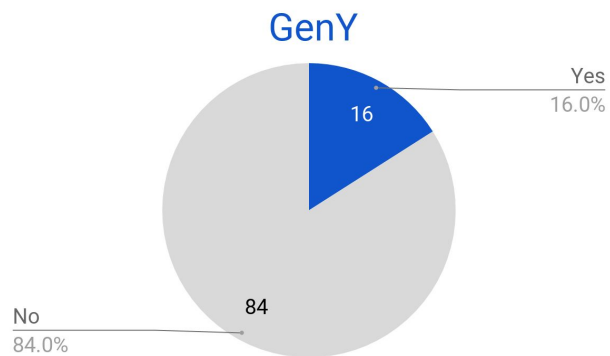
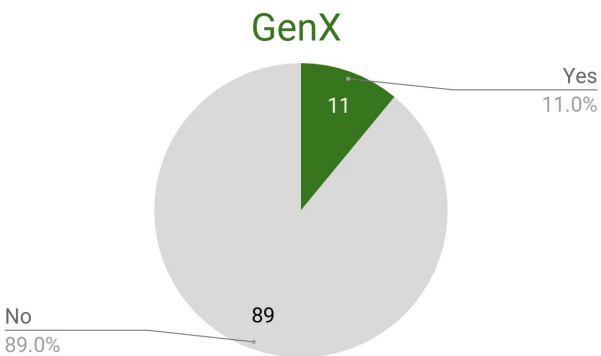
*base size too small to report.



About one-quarter of GenZ readers have tried to edit a Wikipedia article, vs. only 11% of GenX.

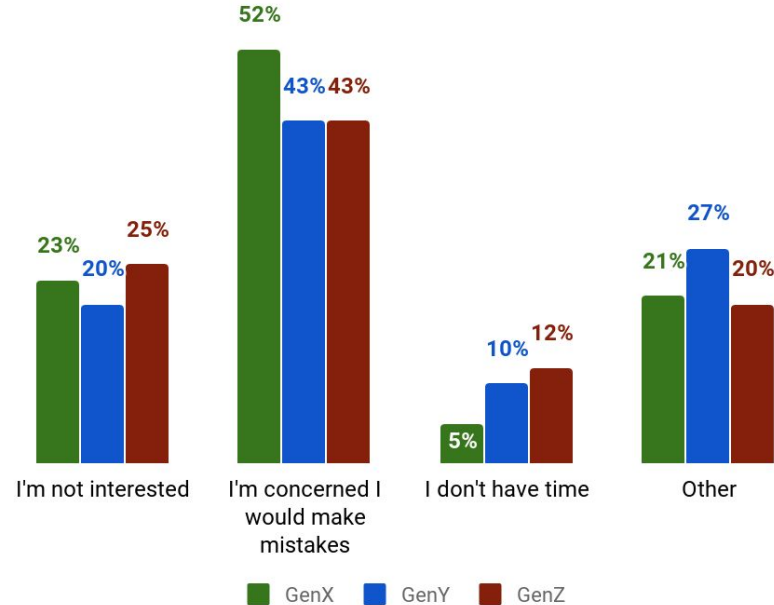
Q18a: Have you ever tried to edit a Wikipedia article?

Base: 566 Readers who know anyone can edit.



About half of Japanese readers who have never tried to edit are concerned that they would make mistakes.

Q18b: Which of the following best explains why you have never tried to edit a Wikipedia article? Base: 474 Readers who have never tried to edit.

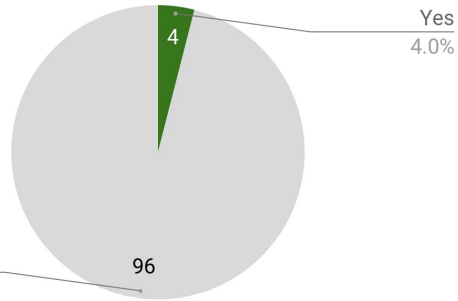


Across the generations, eight out of ten readers or more have never made a donation to Wikipedia.

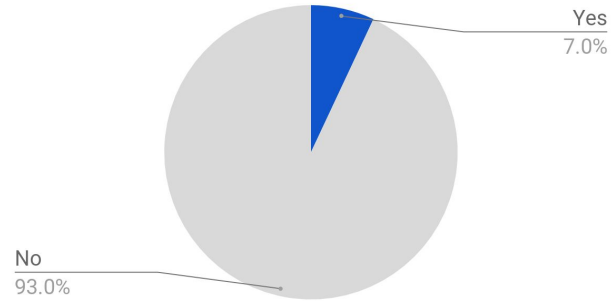
Q19: Have you made a financial donation to Wikipedia?

Base: 704 Wikipedia Readers.

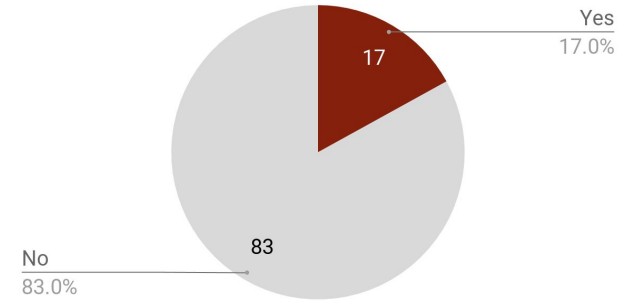
GenX



GenY

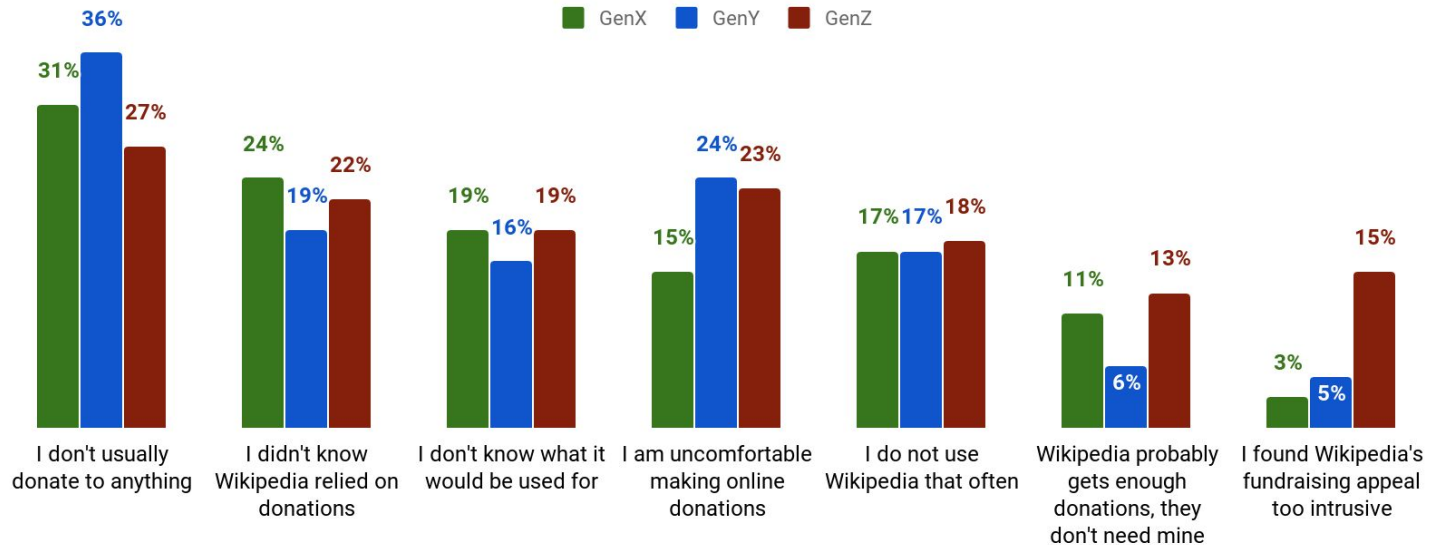


GenZ



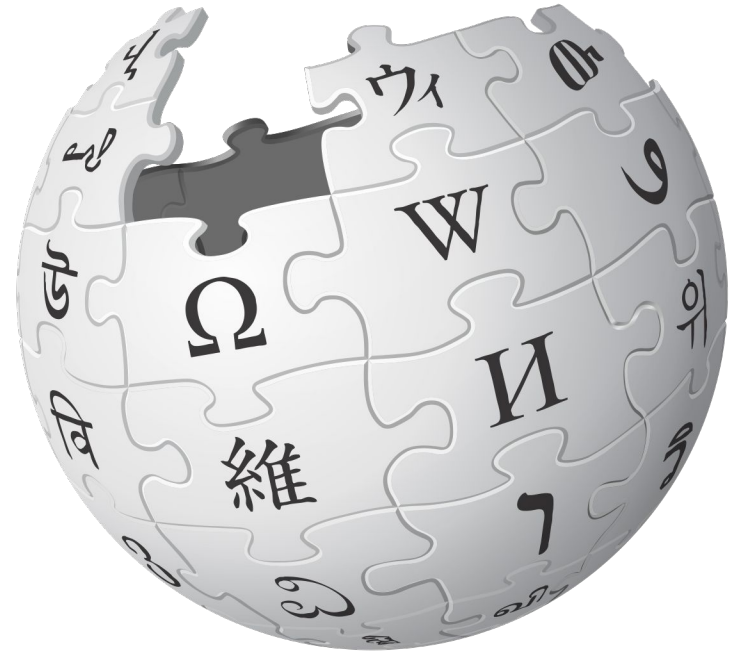
About four out of ten say they either didn't know Wikipedia relied on donations, or what the donation would be used for.

Q20a: Which of the following best explains your decision NOT to make a donation to Wikipedia? Base: 649 never donated.



Attitudes toward Wikipedia

Japan internet users by Generation
Total Base: 1150
Weighted Data



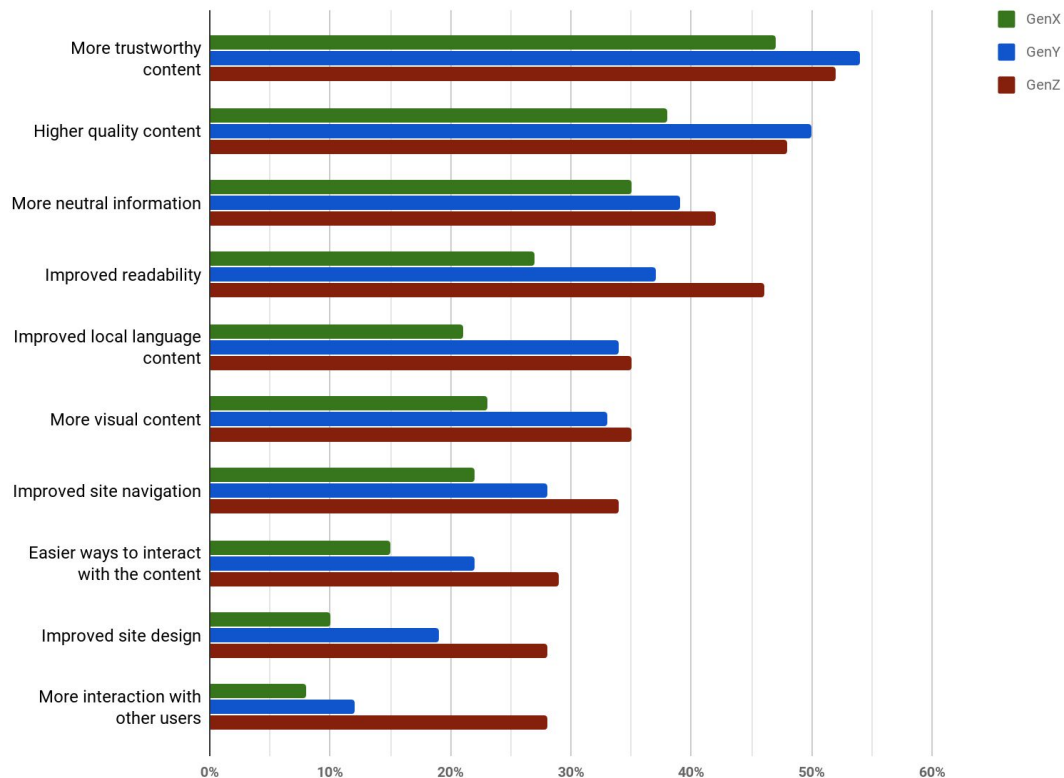
What readers find personally important is also what they most strongly associate Wikipedia with: being useful, easy to read, and free.

	GenX		GenY		GenZ	
	Mean Association Rating	Personal Importance Ranking	Mean Association Rating	Personal Importance Ranking	Mean Association Rating	Personal Importance Ranking
Free knowledge for every person	8.0	1	8.2	1	7.7	3
Useful	7.4	2	7.6	2	7.6	1
Easy to read	6.0	3	6.4	3	6.7	2
Neutral, unbiased content	5.6	4	5.3	6	6.0	6
Professional	6.1	5	6.4	4	6.8	5
High Quality	5.5	6	5.5	5	6.3	4
Free of advertising	6.3	7	6.3	7	6.5	7
Transparency	5.5	8	5.3	9	5.7	8
Comprehensive	5.7	9	5.7	8	5.8	9

(Note in Japan the lowest association scores - under 6 - were with Neutral, High Quality, Transparency and Comprehensive.)

About half of Wikipedia readers say “more trustworthy content” will 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: 704 readers.



Percent answering “a lot.”

THANK YOU

