As a social movement, we will focus our efforts on the knowledge and communities that have been left out by structures of power and

The essential infrastructure

and diverse communities. We will break down the social, political, and technical barriers preventing people from accessing and contributing to free knowledge.



UNDERSTANDING

WIKIMEDIA AFFILIATES

SURVEY REPORT



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### **EXECUTIVE SUMMARY**

In early 2020 the Global Data & Insights team collected data from more than 275 individuals from across 96 Affiliates in 89 countries. These data help us to understand the institutions built by affiliates to organize community interactions, as well as the community spaces affiliates provide for their membership to prosper. They also tell us whether affiliates feel adequately resourced and supported to be effective strategic partners toward achieving the Wikimedia Foundation's <a href="Medium Term plan goal">Medium Term plan goal</a> of a Thriving Movement and the overall <a href="2030 Strategic Direction">2030 Strategic Direction</a>.

## **Key Findings**

To attract and retain more diverse members, the Wikimedia Foundation must invest in affiliates' institutional resilience through capacity development focused on communications, contributor development, and community governance.

- Affiliates were least confident in their abilities to evolve better organizational governance and resource policies (44%), to communicate and run press relations (45%), or to host and promote contributor development activities (68%); all of which are essential capacities related to higher-level organizational development.
- The overwhelming majority of chapters and thematic organizations have elected boards, while user groups tend to adopt less formal governance structures. All governance structures are predominantly made up of more men than women or gender minorities.
- Interestingly, membership in User Groups is much more representative of the global gender distribution than in chapters and thematic organizations.
- 61% of affiliates have formal democratic processes for making group decisions, while 34% have no existing processes and policies for intervening with conflict internally.

To support an optimal social climate for affiliate members, the Wikimedia Foundation should focus on support for more inclusive interactions and motivations for participating in collaborative projects. There is also a need to support greater awareness of local/regional events and strategic content programs beyond GLAM and education.

- Survey respondents indicated that they feel they belong to, are engaged in, and can collaborate within their community's social spaces. However, they were less likely to be encouraged to speak freely among members of different backgrounds or to observe awareness of different individual's motivations.
- Survey respondents were twice as likely to focus on GLAM and Education programs, and
   1.6 times more likely to focus on Indigenous knowledge and STEM programs than they were on gender and health-related programs.
- Members were more aware of Wikimania and affiliate organized events, than they were of regional/thematic events.
- Affiliates demonstrated high awareness of Wikimedia Foundation grant and programmatic support but were less likely to be aware of other sources of funding. This, coupled with low self-ratings for fundraising, indicates affiliates would likely benefit from capacity development focused on seeking external grants for financial sustainability.

## Introduction

Our 163 (as of January 2020) recognized affiliate communities are key to Wikimedia Movement coordination and success. The Affiliates Data Survey is an annual census conducted with all affiliates to better understand their composition, behaviors, and opinions. Since 2018, the Affiliations committee has recognised 55 new affiliates, 36 (66%) of which came from regions of the world where the next billion internet users are expected to come from (Ang C. 2020). This makes it ever more urgent for the Wikimedia Foundation to better understand affiliates in order to target the support affiliates need to meet our shared vision. This survey presents the Wikimedia Foundation and the larger movement with a useful means to regularly measure progress towards common goals in the Foundation's Medium Term Plan and the Movement's 2030 Strategic Direction.

### Affiliates as institutions

"Institutions are the rules of the game in society or, more formally, are humanly devised constraints that shape human interaction."

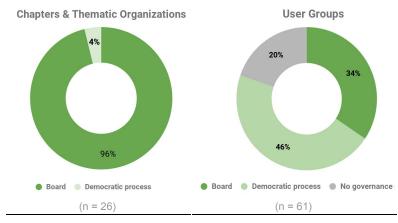
- Douglass C. North, (North, D. C. 2017)

Wikimedia affiliates are an essential infrastructure for coordinated movement strategy. They act as both institutions that shape community structures and cultures, as well as spaces for the community to congregate and prosper. It is critical to understand and invest in their institutional resilience if we want to successfully meet shared movement goals.

# Institutional Identity

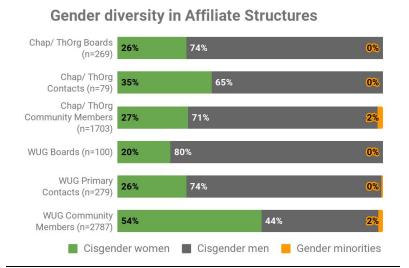
Affiliates identify themselves in two aspects, first through structures they use to govern themselves, as well as the people they elect into those structures. The majority of chapters and thematic organizations have elected boards, while user groups tend to adopt less formal governance processes.

96% of Chapters and Thematic
Organizations have elected boards as
structures for community governance.
In contrast, 46% of all User Groups
employ a less formal democratic
structure for community governance,
with 34% having an elected board,
46% using a democratic process, and
about 20% having no governance
process. There were no changes in
the types of community governance
structures, between 2018 and 2020.1



**Figure 1.1**: The majority of chapters and thematic organizations have elected boards, while user groups tend to adopt less formal governance processes.

Gender representation continues to be a concern amongst affiliates, especially within organizational structures of governance and influence. Men are overrepresented on boards (74% of Chapter/Thematic Organization boards and 80% of User Group boards are men) as well as among formal representatives of affiliate groups (65% of Chapter/Thorg primary contacts and 74% of User Group primary contacts are men).



**Figure 1.2**: Men dominate governance structures amongst affiliates. Note: WUG = Wikimedia User Group; ThOrgs = Thematic Organizations

A year-over-year analysis revealed a statistically significant decrease in the proportion of men on boards (\13%)<sup>2.a</sup> as well as a decrease in the proportion of men listed as primary contacts of affiliates (\18%).<sup>2.b</sup>

Still, we continue to see more men than women in structures of leadership amongst affiliates. Interestingly, membership in User Groups is much more representative of the global population than chapters and thematic organizations.

#### Institutional Culture

Two-thirds of affiliates require that members must sign-up as well as meet a certain threshold of relevant activity to join. Many of these affiliates (61%) also use formal democratic processes (Leadership/ Board voting processes that are either partially or fully democratic) for making group decisions. While 34% of affiliates have no existing processes and policies for intervening with conflict internally.

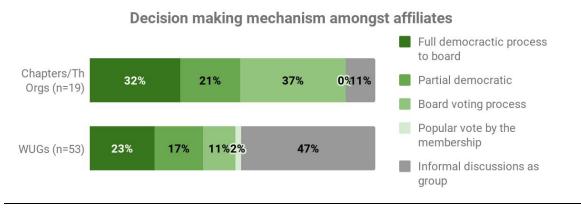
Affiliates continue to exhibit a similar pattern to 2018 in their membership requirement practices. Most require that new members sign-up (26% in Chapter /Thematic organization boards and 36% in User group boards) and/or to have a certain threshold of activity (32% in Chapter/ Thematic organization boards and 33% in User group boards).

We are not able to make a year-on-year comparison for these practices, as we have had to change the categorization methodology from 2018.



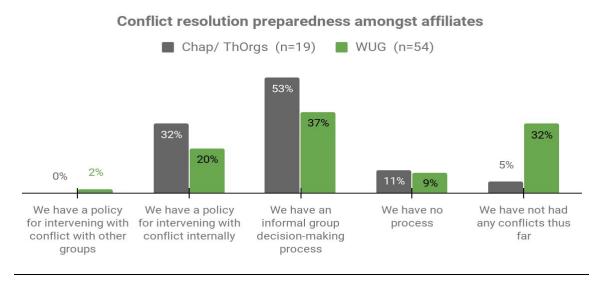
**Figure 2.1**: Affiliates apply a combination of formal and informal requirements for new members to join.

Chapters and Thematic Organizations preferred to use more formal processes for decision-making; 90% report having a partial or complete democratic process or Board voting while the remainder use informal group discussions for decision-making. User Groups employed both formal processes (53%) and less formal processes (47%). There was a noticeable increase in affiliates' ability to use both formal and informal processes to make group decisions from 2018 to 2020.<sup>3</sup> In 2018, 47% used a combination of full/partial democratic board voting processes, 28% used popular voting, and 25% used informal discussions.



**Figure 2.2**: Affiliates are adopting formal processes for making group decisions Note: WUG = Wikimedia User Group, ThOrgs = Thematic Organizations

Chapters and Thematic Organizations are more prepared than User Groups to intervene with internal conflicts using both formal and informal conflict resolution mechanisms. This is consistent with responses from the 2018 survey. 4



**Figure 2.3:** Affiliates use both formal and informal conflict resolution mechanisms, However, a third of user groups have not experienced group conflicts

### **Institutional Capacities**

Affiliates were most confident in their ability to execute programs and events, develop new contributors and manage conflict internally and significantly less so in all other capacities related to higher-level organizational development.

Chapters and Thematic Organizations continue to exhibit a strong capacity to plan and execute programs and events, to build partnerships as well as continually evaluate the impact of these activities. While they have had some successes in the past for running communications and press relations, advocating for policy changes towards more open licensing of content, and raising funds for movement activities, most affiliates indicated these areas as critical targets for developing capacity in the next 12 months.

User Groups continue to show strength in capacities related to welcoming and nurturing new community members, such as contributor development, executing programs and events, and managing internal group conflicts. They struggle mostly to build more formal structures for fundraising, policy advocacy, and general governance of their young groups.

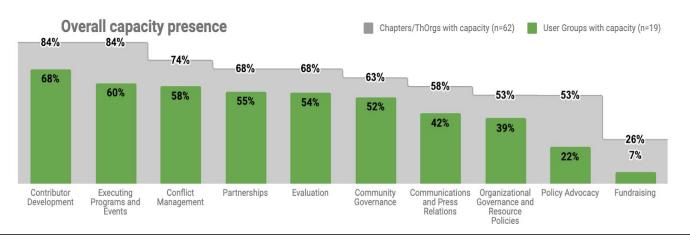


Figure 3: Presence of Capacities amongst affiliates

Capacity for contributor development and building partnerships were consistently rated in the top 4 across geographic regions.

### **Activities**

On average, affiliates conducted editing events 1.5 times more often than other types of programmatic activities. These events are known to be effective at improving on-wiki content as well as community interactions and engagement (Learning & evaluation 2015).

We continue to see activities/programs that require light coordination and planning, such as photo events, education partnerships, GLAM partnerships, and other partnerships, having a moderate presence. Whereas, activities that require specialist knowledge/capacity such as

technical events, conference organising, and Wikipedia Library, were least common across affiliate groups and regions.

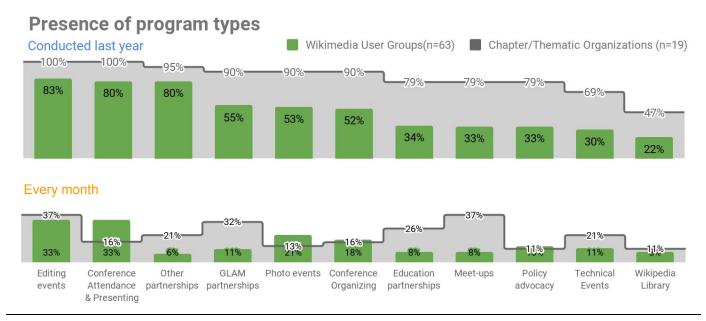


Figure 4: Presence and frequency of programs amongst affiliates

There were no noticeable changes in the presence of programs between 2018 and 2020.5

Consistent with last year's survey results, Wikimedia affiliates in economically developed countries/regions run programs more frequently compared to those in economically emerging countries/regions. While Asia and Middle East regions were cited as regions showing low frequency in programs, we did not receive responses from these two regions to make a year-on-year analysis of change.

# So what?

To strengthen affiliates as effective institutions for building a diverse and inclusive movement:

- AffCom should encourage Affiliates to develop a shared gender equity strategy and policies to improve practices of inclusivity and community governance.
- The Wikimedia Foundation should create a plan to help affiliates build capacity in communications, contributor development, and community governance, all of which are crucial to achieving the Medium Term Plan goals under Thriving Movement

# Affiliates as community spaces

"Community organization is perhaps best defined as assisting a group of people to recognize their common needs and helping them to meet these needs."

- Walter W. Pettit, (Weaver, W. W. n.d.)

There is an ample and growing body of knowledge about public spaces and their role in the social life of communities. They act as a 'self-organising public service', a shared resource in which experiences and value are created (*Mean, M., & Tims, C. 2005*). Affiliates have become invaluable as public spaces for community members to meet in person and to continue that meeting online. Affiliate members shared the following insights about the community spaces created by affiliates.

## Backgrounds

Survey respondents were three times more likely to be male, most were between 35 and 44 years old, had completed high school, were employed, and had access to the internet. Based on the organizational information submitted by affiliate primary contacts, we know that these survey respondents are not representative of the general population of affiliate members. While we cannot generalize these findings to all affiliate members, they do provide valuable information about the typical respondent and have helped us to pilot these measures for broader implementation in 2020.

Responses have been weighted to the affiliate they represent so that all affiliates are counted equally in the data summaries that follow.

Community members from 43 countries shared their experiences about interactions within affiliate community spaces. Almost half (49%) of the respondents live in European countries.

As with the findings from the organizational survey, most of the community members were male (73%). Although the median age was in the 35 - 44 age group, the majority of respondents were under 34 years old (18-24 years = 20% and 25-34 years = 37%). The majority of the respondents were employed (76.1%) and had access to the internet all the time (69%).

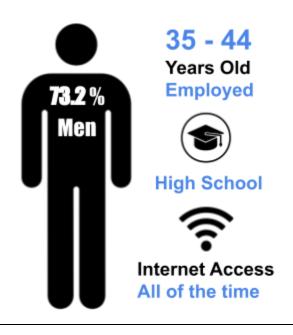


Figure 5: A typical community respondent

### Social climate

We asked affiliate members to answer a set of questions about specific experiences in their community spaces, to better understand their perceptions about how their social climate is constructed. Our 2020 set of social climate categories include:

• **Inclusive Interactions**: (3 questions) - Do community members experience an environment that supports the free and open expression of ideas among contributors of different backgrounds?

- Awareness of Self and Others: (2 questions) To what extent are people aware of others and their own motivations?
- Collaborative Intention: (1 question) How much do contributors feel that others are interested in building successful cooperative relationships?
- **Engagement**: (1 question) How much do community members identify with, are inspired by, and promote being a part of the Wikimedia movement and its projects?
- **Feelings of Belonging:** (1 question) How respected do people feel as a part of the Wikimedia movement, its organizations, and decision-making processes?
- **Problem Solving & Negotiating:** (1 question) How much do community members feel that others seek fair solutions and are willing to talk through competing personal interests?
- Affiliate conflict support: (2 questions) How do community members feel about their affiliate's ability to support them when a dispute or conflict occurs among members?

Affiliate members reported a favourable social climate in which members feel they belong, are engaged and can collaborate. However, members were less likely to report favourably about Inclusive interactions and self-awareness.

More than three quarters (79% favourable) of respondents felt that there are adequate community policies and systems in place to facilitate safety and appropriate response to harassment.

While respondents felt confident that their affiliate organizations' spaces encouraged positive attitudes towards values of diversity (78% favourable) and commitment to diversity amongst its members (76% favourable), they were more ambivalent (70% neutral) about these spaces being conducive enough for them to experience inclusive interactions.

Respondents were generally skeptical about their affiliate's ability to create a conducive environment for self-awareness (42% neutral to 12% favourable). There were no differences in how different genders rated the above constructs, however, women (70%) rated self-awareness more favourably than men (54%).6

#### Overall social climate in affiliate spaces

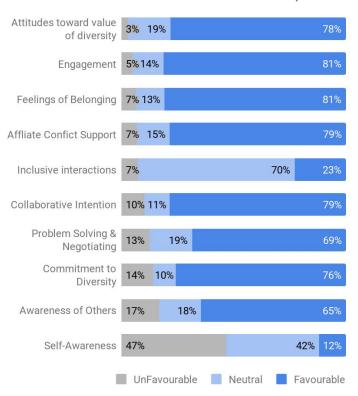


Figure 6: Overall social climate within affiliate spaces

A majority of respondents felt that community spaces provided favourable conditions for engagement (81% favourable), feelings of belonging (81% favourable), collaborative intention (79% favourable) and problem solving (69% favourable). There were no differences in how different genders rated these constructs. Furthermore, there was a consistent degree of reliability in how each construct was measured.<sup>7</sup>

### Programmatic areas of focus

Affiliate communities have been leading much of the organizing/outreach work that grows the Wikimedia movement through programmatic activities that support communities to engage new audiences, and bring high quality contributors and content to our projects. In 2019-2020, affiliates led 88% of the annual Grants, 90% of Education programs outside of the US, and 77% of GLAM programs in 2019-2020.

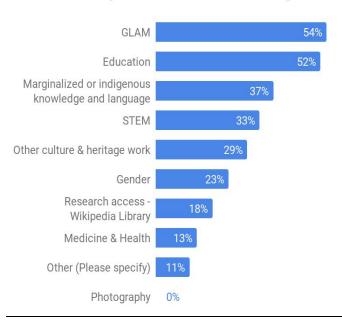
Affiliate members are twice as likely to focus on GLAM and education programs, than they are to focus on gender and health-related programs.

Respondents are most likely to focus their programmatic activities on GLAM (54%) or education (52%) programs.

Interestingly, community members were three times as likely to focus on programs related to marginalized or indigenous knowledge and languages as well as Science, Technology, Engineering and Mathematics, than they were likely to be focused on Medicine & Health programs.

Gender and Health programs have been conducted by affiliates in the past, however, there has not been a consistent and widespread campaign to support these programs. For both program types, User Group members displayed a higher mean compared to Chapter and Thematic organization members.<sup>8</sup>

### Community members are working on



**Figure 7**: Current programmatic focus of community members

### Awareness of resources & events

Affiliate members are 1.5 times more likely to be aware of grants and funding from WMF than grants from other Wikimedia Affiliates or non-Wikimedia organizations. A majority of respondents reported awareness of resources in the form of grants provided by the Wikimedia Foundation.



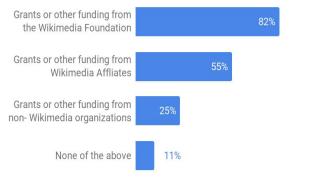


Figure 8: Resources awareness levels

Chapters and Thematic organization members were 1.5 times more likely to know about grants or other funding from other Wikimedia affiliates than User Group members. Still this means affiliate members are twice as likely to know of grants from affiliates than from non-Wikimedia organizations.

This is consistent with how affiliates rated fundraising as their lowest capacity across affiliate types. This presents a sustainability risk for the movement, as it limits the affiliates' ability to diversify its funding sources and thereby become sustainable, as envisioned by the 2030 movement strategy.

Affiliates played a leading role in organizing face-to-face community events (91% of Annual Plan and Conference grants making up 88% of the funds for these grant programs in 2019-2020 went to affiliates) that bring affiliate members togethers. These events vary in scale from local, regional and international.

Members are more aware of Wikimania and affiliate-organized events, than they are likely to be aware of regional/thematic events and other programs.

The overwhelming majority of respondents reported awareness of Wikimania, the flagship event that has brought the international community to meet in-person since 2005. They also displayed awareness for local events such as meet-ups, edit-a-thons and photo walks. Whereas, members reported a very low awareness for regional and Thematic events.

While no Chapter or Thematic organization reported barriers to attending community events, a small percentage of User Group members reported that, sometimes, they were unable to attend community events due to calendar conflict with their work or school schedule.

#### Events community members know about Wikimania Local contributor meetups and events Photo tours and other volunteer-led initiatives Local Wikimedia conferences Wikicamps Wikimedia Summit International Hackathons Thematic events Regional events hosted by Wikimedia affliates I have not heard of any of these events

Figure 9: Community events awareness levels

#### Collaborating with Wikimedia Foundation

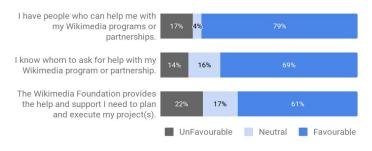


Figure 10: Collaboration awareness levels

Two-thirds of affiliate Members indicated that they know how to collaborate with WMF and that they experienced adequate programmatic support from WMF staff.

Respondents rated human interaction with program officers in the Wikimedia Foundation as a leading factor for their ability to collaborate with the foundation in executing programmatic work in their communities.

### So what?

To improve the quality of experiences in affiliate spaces:

- AffCom should encourage Affiliates to engage in strategies that foster a more favourable social
  environment that supports the free and open expression of ideas among contributors of different
  backgrounds, for example, by adopting a universal code of conduct and diversity engagement
  strategy.
- The Wikimedia Foundation should evaluate current program & grants to Affiliates in order to align additional funding support to local & regional events and programs.
- The Wikimedia Foundation should allocate resources to create diverse and strategic content programs such as Gender and Health or medicine related programs.

# Survey methodology

**Sponsor** Wikimedia Foundation

**Operations Department** 

Collector Global Data & Insights Team

Survey tool Qualtrics XM

**Purpose** Main objectives of the survey are to

collect and analyse data about Wikimedia Affiliates with regards to:

 Structural composition of membership & leadership.

 Conflict resolution mechanisms employed.

Type & frequency of programs conducted.

- Affiliate self-assessment of

 Affiliate self-assessment of ... , ...

capacities/skills.

- Membership experiences

Year started 2018

Sampling frame Wikimedia affiliate primary

contacts & a sample of community members

Sample size 163 Affiliates as of 2019

Mode of administration Online survey

Frequency Annual survey

#### Response rate

163 Affiliates were invited to take this two part survey, from which a total of 387 People started the survey. 275 of them (71%) completed at least 75% of the survey. The respondents are from 96 Affiliates (24 Chapters, 2 Thematic Organizations and 70 User Groups) participated and provided feedback; with a 58% response rate of all recognized Affiliates who were invited to participate.

Response rates varied by region, however, we continue to see a trend of high response rates in Europe, Africa, Asia/Pacifc (Above 50%) and low response rates from North America, The Middle East/North Africa and International organizations (Below 50%) of recognized Affiliates.

The findings from the survey are sufficiently representative of the Wikimedia Affiliates as a community.

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# Appendix A: Endnotes

Below are methodological endnotes corresponding to in-text references.

### Affiliates institutional structures (p. 3 - 7)

- 1. When comparing prevalence of types of governance structures amongst affiliates between 2018 and 2020, an Independent-Samples Mann-Whitney U test found no statistical significance change in both the medians (p = 0.546) and in distribution (p = 0.086).
- 2. A non-parametric test was performed on gender distribution across affiliates structures of leadership as well as membership, with the following showing significant changes.
  - a. An Independent-Samples Mann-Whitney U test found statistically significant change in both the medians (p = 0.045) and in distribution (p = 0.007) of men in boards.
  - b. An Independent-Samples Mann-Whitney U test found statistically significant change in both the medians (p = 0.00) and in distribution (p = 0.00) of men as Primary contacts of affiliates.
- 3. When comparing prevalence of types of governance practices amongst affiliates between 2018 and 2020, an Independent-Samples Mann-Whitney U test found statistical significance change in both the medians (p = 0.00) and in distribution (p = 0.00).
- 4. When comparing prevalence of types of conflict resolutions practices amongst affiliates between 2018 and 2020, an Independent-Samples Mann-Whitney U test found no statistical significance change in both the medians (p = 0.312) and in distribution (p = 0.604).
- 5. When comparing prevalence of types of programs amongst affiliates between 2018 and 2020, an Independent-Samples Mann-Whitney U test found no statistical significance change as follows:
  - a. Conference Attendance & Presenting: medians (p = 0.960) & distribution (p = 0.934)
  - b. Conference Organizing: medians (p = 0.991) & distribution (p = 0.479)
  - c. GLAM partnerships: medians (p = 0.878) & distribution (p = 0.900)
  - d. Education partnerships: medians (p = 0.997) & distribution (p = 0.728)
  - e. Wikipedia Library: medians (p = 0.960) & distribution (p = 0.934)
  - f. Other partnerships: medians (p = 0.973) & distribution (p = 0.702)
  - g. Photo events: medians (p = 0.394) & distribution (p = 0.403)
  - h. Editing events: medians (p = unable to compute) & distribution (p = 0.707)
  - i. Meet-ups: medians (p = unable to compute) & distribution (p = 0.638)
  - j. Technical Events: medians (p = 0.888) & distribution (p = 0.945)

# Affiliates community spaces (p. 8 - 11)

- 6. When comparing ratings of favourable social climate for self awareness amongst men and women, an Independent-Samples Mann-Whitney U test found no statistical significance change in medians (p = 0.39) but found a statistical significant difference in distribution (p = 0.048).
- 7. User Groups showed a higher degree of reliability across all social construct scales (Cronbach's a = 0.876 for 12 items), whereas Chapters and Thematic Organizations was slightly lower (Cronbach's a = 0.731 for 12 items).
- 8. User Group members had a higher focus (Mean = 0.25 and 0.17) on Gender and Health-related programs than Chapters/Thematic Organization members (Mean = 0.17 and 0.04).

# Appendix B: Affiliates recognitions snapshot

36 of 55 (65.5%) new affiliates recognised from Jan 2018 to Jan 2020, came from regions where the next billion internet users (Ang C. 2020) are expected to come from, and as follows:

- Central Africa +40% growth [3.6% of recognitions]
  - Wikimedia Community User Group Tchad
  - Wikimedians of Democratic Republic of Congo User Group
- Southern Asia +20% growth [16.4% of recognitions]
  - Wikimedians of India technical user group
  - Wikipedia Asian Month User Group
  - <u>Vietnam Wikimedians User Group</u>
  - Wikipedians of Goa User Group
  - Dehalvi Wikimedia Community User Group
  - Marathi Wikimedians User Group
  - Wikimedians of Kerala User Group
  - Wikimedians of Santali Language User Group
  - Wikimedia Community User Group Hong Kong
- Northern Africa +14% growth [1.8% of recognitions]
  - Wikimedians of Tamazight User Group
- Western Asia +11% growth [1.8% of recognitions]
  - Wikimedia Community of Tatar language User Group
- Caribbean

#### [ 3.6% of recognitions]

- Wikimedia Community User Group Haiti
- Wikimedians of the Caribbean User Group
- Sub-Sahara Africa

#### [16.4% of recognitions]

- Wikimedia Community User Group Tanzania
- Jenga Wikipedia ya Kiswahili
- Igbo Wikimedians User Group
- Wikimedia Community User Group Guinea Conakry
- Yoruba Wikimedians User Group
- Hausa Wikimedians User Group
- Wikimédiens du Bénin User Group
- Wikimedians of Mali User Group
- Wikimedia Community User Group Uganda
- Latin America

#### [7.3% of recognitions]

- Grupo de Usuários Wiki Movimento Brasil
- Wikimedians of Peru User Group
- Muj(lh)eres latinoamericanas en Wikimedia
- Wikimedistas de Bolivia User Group
- International Diverse

#### [14.6% of recognitions]

- Black Lunch Table Wikimedians
- WikiBlind User Group
- AfroCROWD User Group
- Gender Diversity Visibility Community User Group
- Wikimedians for offline wikis User Group
- Wikitongues
- Wikiesfera Grupo de Usuarixs
- Wikimedians of North American Indigenous Languages User Group

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