ABSTRACT

Genealogists are a community of practice (CoP) that has largely embraced the Internet as a research tool. Genealogists’ use of the Internet was investigated using a case study of users of Ancestry.com, a subscription-based online genealogical resource. Data were collected using an online survey, allowing information and communication behaviors to be examined through the lens of diffusion of innovation (DoI) theory. All study participants are Internet adopters; they adopted at all levels (from innovator to laggard), and each level comprises participants from the entire age range of the study group.

Two research questions framed the investigation: How does use of online genealogical resources impact genealogical research? How do online genealogical resources support interaction among genealogists?

The study found that the Internet has influenced the frequency with which genealogists engage in research. The majority of users conduct genealogical research at least three days per week; prior to Internet adoption the majority engaged in genealogical research no more than twice per month. Users assigned high ratings to the Internet for usefulness and ease of use, although they assigned lower ratings of confidence in accuracy to materials obtained online than to those obtained offline.

The Internet has added communication methods such as email that supplement the methods available before Internet adoption, and users reported more frequent communication with other genealogists than pre-adoption. Participants currently encounter other genealogists who are unwilling to share information with similar frequency to the number of pre-Internet
encounters. The numbers of people who willingly share information is unreported. Because communication has increased and the rate of unwillingness has stayed relatively constant, the number of cases of information sharing appears to have increased.

The findings and their implications for library and information science (LIS) practitioners such as archivists and librarians, as well as for LIS educators and online genealogy resource developers, are discussed.
DEDICATION

This project is dedicated to the memories of Augusta Mobley, Alice Woodford Priestley, Viola Payne, and Helen Pittman Jenkins.

Each of these women inherited responsibility for their families’ histories, and with no children of their own passed these collective memories down to their nieces and nephews.

My work is a tribute to theirs, and I will continue their tradition by sharing our history with my stepdaughter, McKenzie Land; my nephews, Riley Land and Ryan Land; and my niece, Ava Mathews.
# LIST OF ABBREVIATIONS

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
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<tbody>
<tr>
<td>CoP</td>
<td>Community of practice</td>
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<tr>
<td>DAR</td>
<td>Daughters of the American Revolution</td>
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<tr>
<td>DoI</td>
<td>Diffusion of innovation</td>
</tr>
<tr>
<td>LDS</td>
<td>Church of Jesus Christ of Latter-day Saints</td>
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<tr>
<td>LIS</td>
<td>Library and information science</td>
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<td>NEHGS</td>
<td>New England Historic Genealogical Society</td>
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<td>NGS</td>
<td>National Genealogical Society</td>
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<tr>
<td>OED</td>
<td>Oxford English Dictionary</td>
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<tr>
<td>RQ</td>
<td>Research question</td>
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<td>SAR</td>
<td>Sons of the American Revolution</td>
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ACKNOWLEDGMENTS

I owe a huge debt to my dissertation committee members -- Dr. Elizabeth Aversa, Dr. Laurie Bonnici, Mr. Clark Center, Dr. Catherine Davies, and Dr. Jeff Weddle -- for their boundless patience through my many months of planning, writing, and revising. I am also grateful for the guidance of the late Dr. Gary Copeland, who taught, advised, and cheered me through course work, comprehensive exams, and the first draft of this dissertation.

Dr. Aversa, my committee chair, kept me on task throughout the process. This was no small feat. Dr. Davies helped me see the project through a different perspective and shared some of her ancestors’ genealogical pursuits to broaden my vision of the historic role of genealogical societies. Mr. Center provided the insight of an experienced genealogist and archivist, representing both type of practitioner in our discussions. When I needed a Stuart Smalley–style pick-me-up, Dr. Weddle assured me that I was good enough and smart enough to see the project through to the end. (He also spotted countless connections within the document that I had either understated or overlooked.)

My hero at the end of the project is Dr. Laurie Bonnici, who was tapped at the eleventh hour following the unexpected death of Dr. Copeland. She brought energy at the project’s nadir, when my own energy and confidence needed revitalization. In a sink-or-swim situation, she reminded me that I am, in fact, a swimmer, and she graciously guided me to shore.

All committee members provided invaluable editorial guidance and made certain all my i’s were dotted and my t’s crossed. I wouldn’t be here without this team.
I send a hearty thank you to the genealogists who participated in my survey and submitted their stories, comments, and ideas along the way. Their contributions to this project and to the growing body of shared genealogical research are too numerous to list, but they are most definitely acknowledged. This is a rewarding community to be a part of, and I am grateful to have the opportunity to work with and get to know so many wonderful women and men who share this hobby with me.

At the heart of this undertaking is my family, especially my parents, Wayne and Kathy Mathews; my grandmother, Mildred Mathews; and my brother and sister-in-law, Charles and Dalila Mathews. They have provided support in immeasurable ways, especially during the final year of the project. On April 27, 2011, just a month after the launch of my web survey, an EF4 tornado hit the city of Tuscaloosa. More than 10 percent of our city was destroyed in one afternoon. My home was significantly damaged, and our lives were forever changed during those harrowing minutes. There were moments in 2011 when completing this project was the last thing on my mind, and the emotional support provided by friends and family, both local and virtual, was critical as we put our lives back together.

My husband, Tom Land, provided feedback and encouragement throughout the project, especially after the storm. I might not have found my way through those dark months had I not had his strength to lean on. Early in this research I expected to draw on his experience; he is both a genealogist and an archivist. His knowledge was indeed useful, but it pales in comparison to the significance of his unfailing love and reassurance. I am grateful to have such a strong partner.
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CHAPTER 1
INTRODUCTION

Finding one’s own roots can bring a sense of security in our mobile, rootless world.

Quinn (1991, B2)

The Industrial Revolution contributed to the development of two new social groups in the 19th-century United States: an influx of European laborers and a new class of *nouveau riche* Anglo-Americans that “heightened ancestral consciousness” among the established elite (Ashton 1977, 152). The pre-existing upper class used genealogy to validate their social and economic standing by demonstrating a familial connection to the Founding Fathers, as if a position of privilege were a birthright (Quinn 1991, B2).

**Genealogical Societies**

In 1845, the world’s first formal organization dedicated to genealogical research, the New England Historic Genealogical Society, was established in Boston (NEHGS 2011). Early genealogical societies such as the NEHGS and patriotic societies such as Sons of the American Revolution (SAR) shared the goal of celebrating the accomplishments of early settlers and soldiers of the United States while allowing descendants to celebrate their kinship to these early
Americans. Other early societies include the SAR, initiated\(^1\) in 1876; the Daughters of the American Revolution (DAR), formed in 1890; and the General Society of Mayflower Descendants, formed in 1897.

Acceptance into society membership required an applicant to produce documentation such as letters of reference from current members, in addition to a record of lineage and the payment of dues or membership fees. Members of these societies were predominantly affluent, educated, and white; several U.S. presidents, for example, have been members of the SAR (California SAR 2007, 23). As Tarde proposed, the behaviors of socially prominent individuals are more likely to be imitated than those of individuals of lower social status (Kinnunen 1996, 434). Membership in genealogical societies thus had social cachet; not all members were necessarily interested in researching their family history. Some prospective members sought society entry as a means of increasing their own status.

Tarde’s imitation model also provides a framework for understanding the spread of genealogical and patriotic societies across the United States in the late 19th and early 20th centuries. Because they were peopled largely by socially prominent members, societies were both embraced and emulated. Local chapters of existing societies, as well as newly formed groups, were organized in cities and towns across the country; for example, the organization that became the SAR was established in San Francisco.

Although these societies did not represent a cross-section of the American public, and although “the social intent and direction of these patriotic and hereditary organizations may have been exclusivist, they actually opened the door of genealogical legitimacy for a larger segment of the American population” (Ashton 1977, 152). Individuals with an interest in their family history

\(^{1}\) The organization that became the SAR was first organized in 1876, although the SAR was not formally founded until 1889.
but without the time or skills to conduct the research could contact a society to engage the services of an experienced genealogist, for a fee.

**LDS Family History Library**

The Family History Library of the Church of Jesus Christ of Latter-day Saints (LDS) was established in 1894. Its stated purpose is to support genealogical research as a part of the church’s mission: “Genealogical or family history research is the essential forerunner of temple work for our deceased ancestors. We do it … so these temple ordinances can be performed for our kindred dead. Our ancestors then are taught the gospel in the spirit world” (LDS 2011).

The LDS Family History Library and its network of local centers are open to all researchers regardless of religion and have been instrumental in providing widespread access to historical documents and source materials. These resources reflect a broad array of Americans, not just those with connections to significant people, places, or events. Although most genealogical societies maintain a library for the use of paying members only, the local LDS Family History Centers are staffed by volunteers and offer access to materials and instruction on conducting genealogical research free of charge (LDS 2010).

**Twentieth-Century Genealogy**

In 1903, the National Genealogical Society was founded in Washington, D.C., as a means of connecting interested genealogists across the United States with one another (NGS 2012). The early 20th century also saw the proliferation of public libraries, fueled by philanthropists such as Andrew Carnegie. Carnegie provided large grants to fund the construction of library buildings; locally raised funds and voluntarism allowed these libraries to operate. Early in the century, this
volunteer work and fundraising was frequently conducted by women’s social and literary societies (Watson 1996, 162-64). Genealogical societies were also involved in sustaining and promoting public libraries; societies contributed books and other resources, either on loan or as gifts (Rost 1936, 520-21). In addition, because public libraries house the “collective memory of the communities they serve” (Litzer 1997, 38), their accumulation of local history records and resources provides locality-specific material for genealogists.

Little change occurred in genealogical practice until a surge of new interest that began in the 1970s. This renewed interest coincided with two events: the 1976 bicentennial celebration and the success of Alex Haley’s Roots mini-series, which aired in 1977 (Quinn 1991, B2). Quinn also notes late-20th-century social changes such as southern and westward migration, increased divorce rates, and “the dreary sameness of the suburbs” as further reason American interest in genealogy saw an upswing: Americans “yearn for a genuine heritage” that they seek to find by learning about their ancestors.

Internet Access and the World Wide Web

In 1995, 45 percent of Americans indicated an interest in genealogy; in 2000, 60 percent reported being interested in genealogy (Yakel 2004; Maritz Research 2000). Nearly one-third of respondents who indicated interest reported having used the Internet to collect genealogical data.

Horne (2002, 4) found that the Internet has broadened the appeal of genealogical research by improving the availability of and ease of access to resources. Genealogy resources abound on the Internet; in January 2010 Cyndi’s List, an online index of genealogical websites, had 275,000 links to discrete genealogy resources (Howells 2010). The sheer number of genealogy-related websites reflects the significance of the Internet in genealogy research. Many different non-profit
organizations, including public libraries, state archives, and individual volunteers, maintain online resources of interest to genealogists. Many websites provide research material such as census indexes and services such as message boards to the general public at no charge and do not require registration; USGenweb and Rootsweb are examples of free online resources that host contributions from volunteers.

Genealogical information is also provided online by for-profit corporations; pricing options vary dramatically. GenealogyBank, Ancestry.com, and other sites that provide page images of records allow access for a fee. In 2010, Ancestry.com boasted more than one million subscribers to its services and materials (Ancestry.com 2010); by the following year the number of paying subscribers of Ancestry.com’s online resources was more than 1.6 million (Ancestry.com 2011). As Ancestry.com’s growing number of subscribers indicates, the availability of online resources attracts genealogists. This appeal is almost certainly rooted in the amount and quality of searchable material; more than 8 billion historical records are available via Ancestry.com, plus more than 30 million user-submitted family trees.

Recent U.S. Census data show that members of 91.4 million American households (76.7 percent) have daily Internet access from some location, either within the home or elsewhere (U.S. Census Bureau 2009). A telephone survey of American adults also conducted in 2009 found that 77 percent of respondents use the Internet, and 27 percent of these respondents use the Internet for genealogical research (Pew Internet 2010). Those statistics are reflected in the success of online subscription services, making it clear that Americans are using the Internet to research genealogy. Ancestry.com, for example, is a publicly traded company that shows continued financial growth and maintains a popular presence through regular television
advertising and a television series\(^2\) featuring genealogical discoveries made by celebrities such as actors Martin Sheen and Vanessa Williams.

Sociologists have noted the Internet’s usefulness as a way of connecting people who have shared interests (A. Brown 2011, 31-34). “The world’s largest online resource for family history” does more than provide access to documents; Ancestry.com claims to consider its subscribers to be a community (Ancestry.com 2012).

**Defining Community**

“The concept of community occupies a privileged place in the romantic symbolic lexicon of America, as significant as mother, apple pie, and democracy” (Abu-Lughod 1991, 269). Because of this desirable connotation, use of *community* as a label is both so widespread and so loosely defined that vast swaths of population are often grouped together as a single community: e.g., the Latino community, the gay community. The term may be used to describe people who live in a particular location -- e.g., local community -- and it is even used to describe places rather than the people who inhabit them -- e.g., gated community.

The word *community* has a linguistic connection to the concept of sharing. Its etymology derives from the Latin root *commūnis*. Other English words sharing this root include common (adj.), communicate (verb), and commune (noun and verb), all of which denote something shared. Nisbet describes the idea of community as a “fusion of feeling and thought, of tradition and commitment, of membership and volition” (Nisbet 1966, 47-8). The term’s romantic

connotations of unity and connectedness make community a descriptor of choice for many groups, actual or virtual.

The *Oxford English Dictionary* (1989) provides several definitions for community that embrace commonality as a conceptual component: “A body of people who live in the same place, usually sharing a common cultural or ethnic identity” (2b); “a group of people who share the same interests, pursuits, or occupation” (5b). According to the latter definition, genealogists may rightly be considered a community. Although they are geographically dispersed and do not universally share “a common cultural or ethnic identity,” they do share an interest, pursuit, and/or occupation: family history research. Some genealogists not only share the interest in research, they share the fruits of their labor with other researchers.

Within the broad community of genealogists are those individuals who use the Internet as a research tool and as a means of communicating with others. Many of these researchers use online message boards and email list groups to share information. The *OED*’s eighth definition\(^3\) of community, “an online facility, such as an electronic bulletin board, forum, or chat room, where users can share information or discuss topics of mutual interest,” encompasses such boards and groups. Genealogical message boards, for example, would thus be considered a community, although this definition simply describes the “online facility” where communication takes place, rather than the users of the virtual place.

Noting “the importance of the Internet for the sharing of genealogical information,” Willever-Farr and Zach (2011) observed postings on an Ancestry.com message board. Provision of information in response to specific queries was the most common type of post during the

---

\(^3\) The etymology for this definition cites a 1988 reference to “electronic community,” revealing that the concept of *community* comprising geographically dispersed individuals has been recognized for more than 20 years.
observed period. The authors found that the message board indicates “the presence of a communal research service for genealogists by genealogists.”

**Communities of Practice**

Within the broad construct of *community* are communities of interest and communities of practice. “Community of interest” refers to a group of people who come together because they share an interest in a particular theme or topic. A community of practice (CoP) is essentially a community of interest centered on an activity, rather than an interest; specifically, a CoP is a group of people who share the practice of a particular hobby, profession, or skill. The concept was developed by Lave and Wenger in 1991.

At the heart of every CoP is the exchange of information; all parties are involved in learning (Wenger 2006). Members’ interaction with one another results in accumulated expertise and knowledge, and the community members “develop a shared repertoire of resources: experiences, stories, tools, ways of addressing recurring problems” (Wenger 2001). Use of the Internet as a method for communicating and information-sharing allows CoPs to exist beyond the constraints of geographic boundaries. Genealogical message boards serve as a window to a CoP in action. Genealogists share findings and offer advice via message boards and other online communication services; as a community, these practitioners serve as resources to one another. By furthering the research of the group’s individual members, the overall body of community knowledge grows.
Research Problem

Although essays and recommendations for local history collection development (Davis 1989), reference (Filby 1967) and user instruction (Amason 1988) were published throughout the 20th century, empirical studies of genealogists as a user group were few before the 1990s, when Litzer (1997) investigated genealogical society members’ use of and attitudes toward repositories housing family history reference materials.

Genealogists are a CoP, and use of the Internet enables and strengthens the connection between the members of the community. These connections were not impossible in before Internet adoption, but they were more difficult to make (Wenger et al. 2002, 24-5). Yakel’s findings reinforce the idea that forging connections -- including connecting with other genealogists -- is at the heart of genealogical research (Yakel 2004). However, Yakel’s interviews focused on the reasons for connecting rather than the communicative acts themselves.

There has been little investigation into the role of the Internet in the genealogical CoP and how the adoption of online resources enables community. As mentioned above, the success of online genealogical resource providers such as Ancestry.com indicate that the Internet had had an effect on the practice of genealogy. The extensive archives available for retrieving message board postings suggest that Internet access also facilitates communication among genealogists. Because little formal investigation has been conducted to date, the impact of online materials on research and communication within this CoP is not well understood.
Research Questions

To address the overarching research problem, this study will be guided by two research questions (RQs):

RQ1. How does use of online genealogical resources impact genealogical research?
RQ2. How do online genealogical resources support interaction among genealogists?

Scope of the Study

This study investigates the ways genealogists’ research and communication behaviors have changed since they adopted online genealogical resources as a research tool. The CoP’s adoption of the Internet as a research and communication tool is assessed via reported perception of quality, usefulness, ease of use, and frequency of use of online resources. Communication patterns among genealogists are also investigated.

Defining Genealogy and Genealogists

Although the *Oxford English Dictionary* (1989) provides a straightforward definition for genealogy, “an account of one's descent from an ancestor or ancestors,” and genealogist, “one who traces the descent of persons,” many library and information science (LIS) professionals and members of the CoP alike are imprecise in using the terms. This study broadens the *OED* definition of genealogist to include researchers who seek to situate genealogy within the field of history; many genealogists prefer to be called family historians or family history researchers. Although this user group comprises both professionals and amateurs, with levels of experience ranging from decades of dedicated research to a mere passing interest, this study uses the term
genealogist to describe all types of family history researchers, regardless of experience, skill, or certification\textsuperscript{4} status.

Additional names used for and by genealogists will be discussed in Chapter 2 as part of a review of the literature concerning genealogy and Internet research behaviors. Chapter 3 will address the methodology and theoretical framework of this study. Chapter 4 will present the findings and Chapter 5 provides a discussion of the results and future research.

\textsuperscript{4} The Board for Certification of Genealogists, established in 1964, provides certification in different categories, such as researcher, lecturer, and instructor (Mills et al. 2001, 46).
CHAPTER 2
LITERATURE REVIEW

This chapter presents a review of the literature relating to the role of communities of practice (CoPs) and the role of the Internet within CoPs. Finally, a review of relevant LIS research relating to genealogists as a user group will be provided.

Community

The idea of community “draws its psychological strength from levels of motivation deeper than those of mere volition or interest… Community is a fusion of feeling and thought, of tradition and commitment, of membership and volition” (Nisbet 1966, 47-8). The concept of community links the sharing of information with emotional connectedness, much like Fulton observed among the genealogists she studied (Fulton 2009a).

Jones (1997) discusses the differences between the content shared within a virtual community and the community itself; according to Jones, simply “meeting” online and exchanging information, even on a regular, reciprocal basis, does not constitute community. He makes a clear distinction between the “cyber-place,” which he calls the virtual settlement, and the actual members who constitute the virtual community (Jones 1997). By this definition, a
genealogy website such as Ancestry.com\(^1\) would be the settlement within which its users form a virtual community.

Case (2010) notes that among hobbyists who interact online, the community itself is an important resource. Blanchard, Askay, and Frear (2010) investigate the differences in sense of community felt within professional virtual communities and their purely social counterparts. They describe professional virtual communities\(^2\) as “groups of people who interact primarily through information and communication technologies” comprising members of a particular vocation across multiple companies and/or organizations (Blanchard et al. 2010, 161, 162). In noting the differences between social and professional communities, the authors assert that “in some social virtual communities (such as health virtual communities), socio-emotional support may be as important or even more important than informational support” (164). Blanchard et al. do not use the term *community of practice*, but the professional communities they describe are CoPs.

**Communities of Practice**

CoPs provide an outlet for practitioners of a particular interest to exchange information. The concept was developed by Lave and Wenger during a study of the apprenticeship model of learning (Wenger 2006). CoPs enable the accumulation of a shared knowledgebase of solutions specific to the members’ common area of practice, and members are able to access this knowledgebase via their involvement with the CoP (Wenger 2001). The Internet allows CoPs to exist beyond the constraints of physical boundaries or limitations. Virtual CoPs facilitate

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\(^1\) The current investigation treats Ancestry.com and its members as a community without distinguishing between *settlement* and *community*.

\(^2\) Genealogy may be considered professional, social/recreational, or a combination of the two; research on both social and professional communities is relevant to a study of genealogists.
connection over a broad geographic range that required greater investment of resources (i.e., time and/or money) before the adoption of the Internet.

Wenger (1998, 72-3) establishes practice as “the source of coherence of a community” and describes its three foundational elements:

1. Mutual engagement: participants’ interaction
2. Joint enterprise: common goals or tasks
3. Shared repertoire: skills and resources exchanged

Taken together, these three components give purpose to a CoP. They also reflect the looseness with which a CoP is defined; a family may be considered a CoP, as may a professional or leisure organization. As Wenger (1998, 6) states, “Communities of practice are everywhere”.

Together, genealogists are engaged in a joint enterprise, and they share information and advice with one another. These three key elements validate this study’s consideration of genealogists as a CoP.³

Genealogists as a User Group

The most comprehensive description of genealogists is found in the National Genealogical Society Quarterly. Mills (2003) acknowledges the inadequacy of a single label⁴ to describe all researchers of family history and asserts that three classifications of researchers are generally lumped together under the heading genealogist:

---

³ There is no evidence in the LIS literature referring to genealogists as a community or as a CoP.
⁴ This study uses genealogist to describe family history researchers, although study participants and other researchers may use different terms.
• Collectors of names and dates who show little concern for sources and context. Mills refers to them as “family tree climbers.”

• Compilers of chronologies and pedigrees who produce documented files of family data but who neglect to include historical context; Mills considers these researchers to be genealogists in the traditional sense of the term.

• “Generational historians” -- a term coined by Mills -- organized researchers who specialize in family history (Mills 2003, 272).

Mills considers these three types of patrons to be very different researchers; the label “family tree climbers” conveys her disdain for information seekers who do not conduct thorough research. Other investigators, however, seldom consider the distinctions between types of researchers within the perceived group.

Although the title of the article “Where Is the List with All the Names?” hints at the types of genealogists Mills considers to be mere “family tree climbers,” the authors do not mock this interest in names and, in fact, describe genealogy as an area of legitimate research. In their investigation of in-library information-seeking practices of genealogists, they explain that personal and place names are points of access for genealogical research at all levels. Whereas Mills defines three types of variously skilled researchers often labeled genealogists, Duff and Johnson suggest that by learning from experienced genealogists and through gaining her own experience, a novice researcher (one who fits Mills’s description of a “tree climber”) “slowly builds up the expertise needed to do genealogical research … and becomes a records expert” (Duff and Johnson 2003, 90).
**Attitudes Within LIS**

Not engaging the question of whether such patrons are on their way to becoming more highly skilled as researchers, Mills points out that there are many casual, unsophisticated researchers who call themselves genealogists. These patrons are seldom held in high regard by more skilled genealogists, and archivists and librarians tend to view them negatively as well. As a result, experienced genealogists tend to avoid using the label. “Serious researchers have learned that, when visiting archives and record offices, any use of the G-WORD (genealogy) may limit their access to records. The result is that they conduct their work so quietly, so efficiently that staff and other patrons do not recognize them as genealogists” (Mills 2003, 272).

These are the researchers Mills considers to be “generational historians,” and their research methods are usually sound. Mills explains that it is the novice researchers, the ones most likely to “describe at length their forebears’ exploits” (Mills 2003, 272), who seek assistance from librarians and archivists, thus darkening those information professionals’ opinions of the whole field.

Mills is an experienced genealogist whose opinion is drawn from years of observation and encounters with both LIS professionals and other genealogists. Few actual studies address the attitudes of genealogists and LIS professionals toward one another. Litzer (1997) used a survey to collect data relating to genealogical societies’ usage of and attitudes toward libraries. Although the majority of respondents indicated a positive relationship between local libraries and genealogical societies, Litzer reports that “18 percent [of respondents] agreed or strongly agreed with the statement that personality conflicts had influenced society-library relations” (Litzer 1997, 43). The findings do not distinguish which party is the source of the conflict -- genealogist or librarian. Overall, Litzer found room for improvement in attitudes and relationships on both
sides of the desk. He notes that although no single measure had more than an 18 percent negative result rate, 35 percent of participants had a negative response to one or more of the seven measures (Litzer 1997, 45).

This unease between genealogists and LIS practitioners is not a recent development. In 1991 the *Chronicle of Higher Education* published an opinion piece by an archivist offering “a defense of genealogy to counter the long-standing tradition of belittling it,” describing archivists’ widely held view of genealogists as “untutored amateurs … with uninformed queries that archivists see as simply self-centered searches for ancestral minutiae” (Quinn 1991, B2). Null noted that the LIS community “has long looked askance at genealogy, when it has looked at all” (Null 1985, 29)

In 1967 librarian and historian P. William Filby noted, “There is hardly a librarian who does not speak scathingly of the genealogist” (Litzer 1997, 37). Almost twenty years before Filby’s comment, Milton Rubincam, past president of the National Genealogical Society, reflected on the perceived gulf between these groups in remarks to a joint meeting of the Society of American Archivists and the American Association for State and Local History:

We are all aware of the fact that an unfortunate antipathy exists between members of the archival and historical professions and the genealogists. The former generally view the ancestry searchers with contempt, regarding them as people who contribute little or nothing to our knowledge of this country’s past. ... The genealogists, on the other hand, often think that archivists and historical society personnel deliberately close their eyes to the real value of genealogical investigation and consequently are uncooperative when requested to make available records in their custody (Rubincam 1949, 333).
Validity and Value of Genealogical Research

Some historians explicitly justify the value of genealogical research. Culbert (1975) describes research of one’s own family history as a meaningful way to personalize the study of history for undergraduate students. His paper was delivered at the Society of American Archivists’ annual meeting in 1975, and its stated goal was to impress upon the gathered archivists the value of amateur family histories to professional historians. He asserts, “If genealogy is concerned with lineage, names, and year of birth and death, family history attempts to understand the life of an entire family over several generations. … [F]amily history combines the remembered past with supporting documentation” (Culbert 1975, 534, 536). This view limits the scope of the term genealogy to being a subset of family history, but it sets family history within the broader field of history.  

Evans, an Australian historian, employed a genealogist to help complete a project and reports being impressed by the speed and accuracy of the research conducted. She argues against the negative attitude held by many: “Family historians have been dismissed by professional and academic historians, in Australia and beyond, as ‘misty-eyed and syrupy’ and their findings and practices deemed irrelevant to the wider historical community (Evans 2011, 49-51). Her article concludes with the following declaration:

If family historians want to understand history through the lives of their ancestors then social and cultural historians can help them to contextualize these stories but we also need to acknowledge the content of their contributions. For those of us who … spend our professional lives searching for histories of resistance and

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5 As noted in chapter 1, this study uses the term genealogists to refer to all individuals who engage in the study of family history; likewise the term genealogy is used. References in literature referring to the field as family history have not been changed.
negotiation, it seems to me appropriate to reassess the condescension shown towards the motivations, methods and findings of family historians (68).

Quinn suggests that LIS professionals tend to view the goal of genealogy as the mere documentation of one’s pedigree by compiling names and dates, rather than the development of an understanding of one’s heritage. He urges them to recognize that this research “may not be grand scholarship, but it is, nonetheless, genuine historical research” (Quinn 1991, B2).

LIS research has been conducted on the motivation behind conducting genealogical research. Yakel (2004) interviewed genealogists to interpret their motivations and the changes that occurred in their information-seeking practices over time; she looked at “why” rather than “how” these users sought information: “[G]enealogy and family history are as much about seeking information as they are about seeking meaning. Self-identification and self-discovery through the role of family historian were an important dimension of the genealogical research process.”

The inclusion of genealogical resources in collection development and policy-making has also been discussed in the literature. Ashton (1977) offers a retrospective look at the Newberry Library’s renowned genealogy collection, and its collection policies, from 1887 to 1977. Of interest is the change to the admission policy implemented in 1960; to limit the number of casual patrons, the library barred general researchers below the master’s thesis level. Unaffected by this policy change were genealogists, who were admitted regardless of their academic standing. “Rather than suffering the negative discrimination to which they have often been subjected in libraries, genealogical researchers at the Newberry Library became an especially privileged group, the only people admitted automatically, on request” (Ashton 1977, 158).
Yakel and Torres (2007, 94) refer to genealogists as “an understudied group within the archival and library communities,” although they report that sociologists\(^6\) have investigated genealogy “as a cultural phenomenon, focusing on motivations for this activity and its underlying meaning” as a construct of both individual and community identity. Kramer, however, describes genealogy as “under-researched and under-theorized” in sociology, “with little sociological data collected on the phenomenon” (Kramer 2011a, 380). Her study ties the anthropological concept of kinship to the sociological construct of affinity to examine connectedness; these researchers do not focus on connectedness among genealogists.

**Information Seeking and Sharing**

This user group is attractive for study due because it is an information-based activity and involves both professionals and hobbyists. However, the LIS literature has largely neglected genealogists’ information-seeking and information-sharing behaviors. M. Brown’s research in New Zealand focuses on communication and information sharing among genealogical researchers; the sharing behaviors they describe contribute to their study participants’ personal research goals (M. Brown 2008).

In 2009 Fulton shifted the focus toward relationships between genealogy researchers. Fulton collected data from 24 amateur genealogists through semi-structured telephone interviews “about their hunt for their Irish ancestors” (Fulton 2009b, 253). Two papers were published in 2009 interpreting the findings; in one the data were analyzed with the goal of identifying the relationship between genealogical information seeking and feelings of pleasure or enjoyment.

Fulton found that the genealogists she studied derived pleasure from the process of information seeking, rather than only from the results of the information-seeking process. “The potential for finding a bit of information led to feelings of excitement and eagerness to obtain information” (Fulton 2009a, 254). She uses descriptors such as “invigorating,” “fun and excitement,” and “thrill” when describing participants’ engagement while seeking information. The satisfaction genealogists derive from information-seeking activities extends to information sharing as well, according to Fulton. Among her studied genealogists were individuals whom she identified as “super sharers,” researchers who are willing to assist any fellow genealogist, whether they share a common ancestor or not (Fulton 2009b, 761). The super sharers dispensed more than historical information; they also shared their skills and expertise in much the same way a reference librarian or archivist might. As Fulton explains, “The super sharer might assist ... with such tasks as finding information or sources and learning to navigate information systems” (Fulton 2009b, 765). Super sharers facilitate productivity within the genealogy CoP.

**Internet Use**

Recent U.S. Census data show 76.7 percent of American households have daily Internet access from some location (U.S. Census Bureau 2009). This widespread Internet access, paired with the proliferation of genealogy-related websites and services, has helped spread interest in

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7 This emotional response may lead to greater engagement with other researchers as well as with the information itself; Fulton provides a framework on which to construct future research regarding collaboration and relationships among genealogists.
genealogical research; Horne estimates there were thousands of genealogists before the Internet, whereas now there are millions of people interested in genealogical research (Horne 2002, 4). Horne also notes, however, that modern genealogy is not dependent on Internet access: “computer technology seems to be an asset, though not a necessity of popular genealogy, as we know it today in North America.”

Very little LIS research specifically investigates the relationship between genealogy and Internet adoption. Fulton (2009b) offers the most detailed assessment of the Internet’s role in genealogy by describing its usefulness in her study participants’ genealogical pursuits. She notes that the Internet brought satisfaction to participants by allowing them to locate the information they sought, and it enabled them to develop relationships with other genealogists while sharing information (Fulton 2009b, 761, 762). Skinner (2010) also investigated amateur genealogists’ satisfaction with resources; she paired her findings with usage data and correlated satisfaction with resource type and source.

Yakel and Torres (2007, 95) interviewed and observed genealogists during 2003-04, which was well into the period when the Internet was being adopted by genealogists. However, their interview guides’ technology-related questions are centered around genealogical software, not communication or publication online (113).

A search for relevant LIS literature on communicative uses of the Internet by groups of users other than genealogists reveals a few relevant studies. Hoadley and Pea (2002, 326) discuss technology’s role as a means of connecting researchers before they become collaborators. Although their work is geared toward developers of communication technology systems, Hoadley and Pea’s assessment of a “learning community” as one that enables participants to
collaborate while sharing information resonates as an apt descriptor for many genealogists’ online engagement.

Millen and Dray (2000, 167) examine the information-sharing practices of journalists using an online message board. In their study, the investigators are observers but not participants. As part of their overview they discuss general features of online communities, such as the different foci each may have -- for example, a common interest such as rock climbing. This particular online community was formed with the purpose of sharing information, much like genealogy-related websites and message boards are (Millen and Dray 2000, 169). Their data were collected through a content analysis of public communications in a message board archive, excluding private correspondence between participants. Thus their emphasis is on collective shared information rather than on one-on-one collaboration (170-1).

Rioux (2005) presents a conceptual framework for understanding the sharing of information in an online environment, which he terms “information acquiring-and-sharing (IA&S).” His work does not focus on the role of community but on the role of the individual information sharer. The chapter cites a 2000 study by Erdelez and Rioux that found that many researchers locate online information that they recognize as useful to their own research as well as being of use to others. These researchers generally pass along the found information via email. This evidence is provided to demonstrate that “Internet environments actually facilitate both information encountering and information acquiring-and-sharing” (Rioux 2005, 169-70).

**Genealogists as a Community**

The genealogy-related LIS literature comprises different assumptions about the role of community in genealogy. In his investigation of genealogists’ information-seeking and
information-processing behaviors as acts of knowledge building, Lucas (2008, 204) describes communication between study participants and other individuals almost as an aside. Although he reports that “reliance on social networks” was common among his study’s participants, he observes that despite participants’ mentioning other family members who are interested in genealogy, “the limited number of interactions at the libraries in this study also demonstrates a desire on the part of participants to work alone.” Lucas likens genealogists to other humanities researchers, referring to Wiberley and Jones’s 1989 study of humanists’ information-seeking processes and their findings of low levels of collaboration during the research process. Veale reaches a different conclusion when quantifying the degree to which community has been achieved in her observed genealogical newsgroups; she reports that genealogists rarely work alone but instead need to be involved with other researchers. “Genealogy requires, and creates, community” (Veale 2004). Fulton’s research corroborates this assessment.

Yakel discusses the ongoing nature of genealogy and the relationship of such continuing research to community. “In general, participants pursuing family history viewed this endeavour as an ongoing process, rather than as a project that could be finished with the completion of an ancestry chart. As a consequence, they have formed strong networks and a social system to support their information needs” (Yakel 2004). Although she describes family history as “an information-intensive personal activity that takes place in a non-work environment,” she does not imply the absence of community, and in fact Yakel’s research underscores the importance of social connection within the pursuit of genealogical research. Yakel describes genealogy as requiring connectivity with other genealogists. Her study’s participants shared information “both within families and with strangers” (Yakel 2004).
As with other research areas, genealogists’ interests are not always linked to the geographic area in which they live; e.g., a researcher in California may study ancestors who lived in Connecticut and whose relevant records would be located in a repository there. Horne cites her study participants’ membership in local genealogical societies—that is, groups located near their homes, even if their personal research interests lie in a different geographic area—as serving two purposes: To make use of the information held by the society and to form relationships with other society members. “To this end they appear to join their local [genealogical society] even if they have no research interests in the geographic area for which it maintains records” (Horne 2002, 96-7).

Despite genealogy’s late-20th-century rise in popularity, the small number of targeted LIS studies to date leaves many questions unanswered. Chapter 3 will present an overview of the theoretical framework and methodology with which this study addresses the role of community and Internet adoption in the research and communication of genealogists.
CHAPTER 3
THEORETICAL FRAMEWORK & RESEARCH METHODS

Chapter 3 presents an overview of the theory upon which this study is framed. A theory statement is developed and supported by a set of concepts and propositional statements that relate the theoretical framework to the investigation of online genealogical resources. The methods used to address the RQs is presented and described. The methods of data analysis are discussed.

Diffusion of Innovation Theory

According to the Oxford English Dictionary (1989) diffusion refers to “wide and general distribution”; an innovation is “something newly introduced.” Diffusion of innovation (DoI) theory provides a framework for understanding how new ideas and products are adopted. DoI theory developed within the field of sociology in the early 20th century and has since been applied across other fields of social science research. One early DoI publication was Tarde’s Laws of Imitation (1903), which addressed the fact that some inventions become successful while others do not. Tarde explained the process of successful diffusion as one of imitation; an invention is introduced and then imitated. This imitation follows what Tarde called “the universal laws of repetition,” which he likens to the concept of undulation in physics (Kinnunen 1996, 433).
Tarde considered two types of force impinging upon the success of an invention: logical and extra-logical laws. Logical laws of imitation follow the customs of the society into which the invention is released. Among the extra-logical laws Tarde proposed are the greater likelihood that an invention proposed by a socially prominent individual is more likely to be imitated than one proposed by a lesser-known person or entity and that in some instances imitation takes place in order to boost an individual’s social status (Kinnunen 1996, 434; Rogers 2003, 230).

Tarde’s work was not widely studied until his ideas on imitation were referenced in 1943 by Ryan and Gross (Kinnunen 437). Rogers credits Ryan and Gross with directing future diffusion research toward examining the factors that influence the rate of adoption and the different innovation information sources and their associated communication channels (Rogers 2003, 55).

Ryan and Gross investigated the pattern of diffusion of hybrid seed corn, a newly introduced agricultural development with demonstrable benefits over standard breeds of corn (Rogers 2003, 55). They interviewed farmers in two Iowa farming communities and collected data regarding their use of hybrid corn, including the date they first heard of hybrid corn’s availability and the source of that information (e.g., salesman, neighbor, newspaper), whether they had planted it, and if they had planted it, the date they began to plant it (Ryan and Gross 1943, 18). Their data also included socioeconomic markers such as frequency of trips to Des Moines, the nearest urban area, and the number of acres of corn they planted annually. Ryan and Gross found that farmers with higher socioeconomic status tended to adopt hybrid corn earlier than their counterparts with fewer acres and/or fewer trips to Des Moines. They also found that early adopters became resources for later adopters within the community by providing “a
community laboratory from which neighbors could gain some vicarious experience with the new seed over a period of years” (Ryan and Gross 1943, 18).

According to Rogers, Ryan and Gross’s 1943 study became the foundation for all subsequent DoI research. In 1962, using the Ryan and Gross hybrid corn case study as one of many examples of DoI research, Rogers’s *Diffusion of Innovations* explained the theory in general terms, applicable to any area of social science research.

Ryan and Gross employed the term *diffusion*, which Rogers defines as a process requiring four elements: an *innovation* is conveyed via *communication channels* over *time* within a *social system* (Rogers 2003, 5). The communication channels may include word-of-mouth (including email messages) and mass-communication methods aimed at members of a particular group of users (Rogers 2003, 18, 24). In order for diffusion to take place, the innovation must be accepted by at least a portion of the social system.

Rogers posits that users must perceive some or all of the following five attributes in order for an innovation to be successful:

1. Relative advantage. An innovation must be an improvement of some sort -- such as enabling the user to complete a task more quickly than before, or reducing the task’s cost or level of danger -- or it will be unlikely to replace the existing item or activity.
2. Compatibility. The innovation must be acceptable within societal norms.
3. Complexity. Successful innovations are not difficult to use or understand, relative to the item or method they are replacing.

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1 The first edition of *Diffusion of Innovations* was published in 1962. The fifth edition was published in 2003 and is cited in this paper.
4. Trialability. Innovations that can be used on a limited or noncommittal basis, such as a test drive, have greater appeal than those that cannot be experimented with.

5. Observability. Social cachet, as well as basic awareness of the existence of the innovation, depend on the innovation’s observability. Rogers uses the examples of solar water heaters, which are located outdoors and are highly visible, and personal computers, which are indoors and much less visible to others, as types of innovation with different levels of observability (Rogers 2003, 15-16).

Rogers defines the adoption process’s five stages, beginning with initial awareness of the innovation and concluding with its adoption, as follows:

1. Knowledge. The individual becomes aware of an innovation.
2. Persuasion. The individual becomes interested in the innovation and seeks information.
3. Decision. The individual assesses the relative benefits of adopting the innovation.
4. Implementation. The individual uses the innovation.
5. Confirmation. The individual decides whether adopting the innovation is appropriate. (If not, the implementation stage served as a trial period.)

Adoption of an innovation seldom occurs universally or simultaneously within a social system. Rogers describes five categories of adopters based on their innovativeness, or the timing of their adoption (Rogers 2003, 22). The five adopter categories are as follows:

1. Innovators. These individuals are the first to adopt. They tend to be technologically savvy, tolerant to uncertainty, and financially secure.
2. Early adopters. Following the innovators are the early adopters. These individuals are less venturesome than innovators but remain ahead of the proverbial curve; they may hold
positions of leadership. Early adopters bridge the gap between the innovators and the majority of the members in a social system.

3. Early majority. Behind the leaders comes the early majority. Members of the early majority adopt an innovation over a longer span of time than the early adopters, in part because there are more people in this group and in part because the early majority tends to deliberate the pros and cons of an innovation. One-third of the members of a given social system fall into the early majority category of adopter.

4. Late majority. Another one-third of the members of a social system fall into this classification, adopting after the early majority.

5. Laggards. The members of this group are the last to adopt the innovation.

The early majority and late majority categories comprise two-thirds of the members of a social system. The remaining one-third is split between the front and back ends of the curve (Figure 1).

![Figure 1. Distribution of rates of adoption.](Rogers 2003, 281)
This broad overview of the DoI literature allows for the formulation of a statement of the theory, the identification of foundational concepts, and the generation of propositional statements regarding DoI as a framework for this study.

Theory Statement

An individual experiments with a new tool to determine the tool’s appropriateness to a need. Experimenting requires the individual to make adjustments to use in order to determine the fit of the tool to the need. The individual shares the tool with peer group members; discussion and feedback are exchanged to assess the applicability of the tool to the need. Evaluation of the tool’s applicability is a process to determine the tool’s appropriateness for the need.

Concepts

An application of DoI theory to the investigation of the impact of genealogists’ use of the Internet is based upon five key conceptual elements and processes that constitute the meta-process of adoption of the innovation:

• User
• Innovation
• Communication
• Trial
• Decision
Propositional Statements

- **User** refers to a person who experiments with a new tool to determine its appropriateness to a need.
- **Innovation** is a new tool being evaluated through an experimental process.
- **Communication** is a process of sharing the tool and/or relevant information with peer group members.
- **Trial** is the process of experimenting with and evaluating a new tool, which involves adjusting use and assessing appropriateness of the tool.
- **Decision** is the process of determining whether to adopt the tool based on its applicability and suitability to the need.

**User**

A user is an individual who is engaging in the meta-process of adoption of an innovation (Figure 2). In discussions of DoI, users are generally considered within the context of a peer group with whom they exchange ideas and experiences. Genealogists are an example of a peer group that provides a social system for its members; individual genealogists are users within this group.

**Innovation**

An innovation is, by definition, something new. According to Rogers, an innovation may be a tool or a technology, but it may also be a behavior or an activity; Rogers uses an example of a public health campaign urging Peruvian women to boil water before cooking with it. For this peer group, the act of boiling water was an innovation (Rogers 2003, 1-5). The soundex indexing
Communication is a process involving the exchange of information and ideas. As part of the course of adopting an innovation, users discuss the innovation and its potential benefits and risks with members of their peer group. Genealogists who are assessing an online resource (the user, who is a potential adopter) will communicate with other genealogists (the peer group) to
collect information regarding usefulness and appropriateness. A user considering use of any online genealogical research tool may share a link to the online tool to allow others in the peer group to investigate and then share impressions as part of the meta-process. For example, a genealogist considering a subscription to Ancestry.com might ask a question on a genealogy message board to solicit feedback from current users of the innovation.

**Trial**

*Trial* refers to the process of experimentation and evaluation of whether an innovation is appropriate for adoption. During this process users seek to determine the innovation’s suitability to their needs. This experimentation and evaluation involves pushing the boundaries of the innovation’s capacity and adjusting one’s own patterns of use. Ancestry.com provides users with a free trial period of a certain number of days; a user who engages in this trial opportunity has access to a variety of genealogy resources and tools within the site. This user may create an online family tree, for example, during this trial period. For a user who has never used an electronic tree-making service, the trial will involve modifying behaviors relating to patterns of use. The goal of the trial is to gather sufficient information in order to decide whether the innovation is appropriate to the user’s needs and therefore suitable for adoption.

**Decision**

Decision is the culmination of the previous stages of the adoption process, in which the findings of those stages are assessed and used to determine whether to adopt the innovation. Decision-making is itself a process, not an action; hence this stage is called *decision*, not the common but redundant *decision process*. Decision involves determining the innovation’s fit to
the need(s); the result of this inquiry is used to decide whether to adopt the innovation. Taken together, the innovation’s appropriateness, suitability, and applicability to the user’s need(s) leads to the conclusion of the five-stage meta-process: adoption (or non-adoption).

In sum, DoI theory is used to examine the adoption of an innovation. The adoption meta-process comprises a series of processes used by members of a peer group to decide whether to adopt an innovation.

**Case Study**

Case studies are appropriate when using different forms of data to study behaviors of groups. A case study approach allows the investigator to discern patterns and behaviors within a specific contextual setting (Tuten 2009, 268-69). For situations in which the phenomenon being examined is inseparable from its context, such as an examination of decision-making behaviors, “the boundaries between phenomenon and context are not clearly evident” (Yin 1981, 98).

For this study, quantitative responses and qualitative comments were collected via an online survey. Among the survey’s respondents are different types of users that may be grouped into subsets of the overall sample population of interest. These subsets include users who have adopted genealogy-based websites that require registration and paid membership.

Users of Ancestry.com were selected for use as a case study of a subset of this population. Ancestry.com is the most widely used of these fee-based online resources. For the purposes of the case study, users are defined as current subscribers, former subscribers, and users of a library’s subscription to Ancestry.com. The case study comprises 887 users of Ancestry.com.
For this case study, online genealogical research is the innovation of interest. The rate of adoption will be assessed. Genealogists who use the Internet for genealogical research were selected as an appropriate population in which to investigate DoI. As noted in Chapter 2, genealogists are a diverse user group; they represent a broad array of demographic attributes. Users vary in age, gender, race, experience level, and education. Members of this population have adopted the Internet as a research tool; their rate of adoption -- and the factors that influence whether they adopt, how quickly they adopt, or why some members do not adopt -- has not been studied.

Participant Recruitment

The Ancestry.com users who constitute the case study were identified from the overall pool of participants, recruited by purposive sampling. The goal of purposive sampling is to select participants “from the population of interest ... that is representative of the population in terms of both central tendency and range on characteristics of interest” (Wildemuth 2009, 121). Specifically, snowball sampling was used to recruit a broad group of potential participants.

Invitations to participate were posted on genealogy message boards and in genealogy groups and email lists (Appendix B: Invitation to Participate, and Appendix F, Table A.1). A list was compiled of the general types of online information-sharing resources available to genealogy researchers; from this a spreadsheet of URLs and list posting instructions was created. The types of message boards, groups, and email lists identified comprised surname-centric, location-centric, race/ethnicity-centric, technology-related, and general genealogical inquiry. Resources intended for professional genealogists as well as those that more broadly serve users of all skill and experience levels were included (Appendix F, Table A.2).
Members of these boards, groups, and lists were encouraged to share the URL with their contacts as well as with other lists or groups of eligible participants. In addition to submitting an invitation to these message boards, groups, and lists, the survey invitation was posted on a static Ancestry.com profile page and on a Rootsweb page created to use both in recruitment and in publicizing the findings once the project is complete.

The link to the survey was used to publish the survey invitation on LIS lists and social networking sites. Sharing the survey invitation with these Internet users increased the range of potential participants; this spread the word beyond the identified genealogy sites.

Facebook was selected as the non-genealogy social networking site. The survey invitation was posted as the investigator’s profile status, which all linked friends could see. Personal messages were sent through Facebook’s messaging system to 20 individuals who are known to have an interest in genealogy or are known to have friends and/or family members who would be potential survey participants. The message asked the recipient to share the invitation with anyone they knew who might be in my target user group. Thus the survey could be relayed globally by the simple reposting of a link.

The purpose of using LIS sources as a means of recruitment was to attract participants on both sides of the desk: not only librarians and archivists who serve genealogists but also those LIS professionals who conduct family history research themselves. At this level snowball sampling was employed by encouraging list subscribers to share and cross-post the survey link to known genealogists and relevant mailing lists. The survey itself served as an instrument for snowball sampling. The final page of the survey included a request and restated the URL for participants to share with other researchers. See Appendix C: Closing Page of Survey.
Survey Instrument

An online survey was selected as the research instrument because its interface is familiar to most Internet users; online surveys are used by a variety of websites to collect many different types of data. Web users encounter polls and surveys used to evaluate product marketing, assess reader preferences, and gauge opinions on a nearly limitless range of topics. As a scholarly tool, the online survey instrument allows participants to respond more candidly than offline surveys (Joinson 2005, 25). Thus the implementation of an online survey to collect data from Internet-using genealogists was a natural choice based on ease of distribution, familiarity to users, and level of anticipated disclosure.

The survey instrument used for this study comprised closed-ended questions, including yes/no, “please select,” and Likert scale responses. When warranted, a comment box was provided (e.g., to allow a participant to explain an “other” response). See Appendix D, Survey Instrument, for the complete survey. Although a possible limitation of online surveys is their likelihood to reach unintended audiences and draw inappropriate participants (Y. Zhang 1999, 59) the length of this survey -- paired with the lack of compensation to participants -- makes such unintended participants unlikely.

RQ1 -- How does use of online genealogical resources impact genealogical research? -- was addressed through questions relating to genealogical research conducted offline, frequency of genealogical research conducted before the Internet, and frequency of genealogical research conducted online. Participants’ attitude toward the accuracy of materials received online versus offline was measured as well.

RQ2 -- How do online genealogical resources support interaction among genealogists? -- was addressed through questions concerning participants’ attitudes toward and their experiences
with other genealogists. In order to capture any additional input from respondents, including specific points of clarification as well as general comments, comment boxes were provided with all questions that allowed “other” as an answer choice. Thus participants had opportunities to explain their experience or opinion throughout the survey. The final page of the survey concluded with a text box providing participants an opportunity to record any additional thoughts or comments. Capturing this qualitative data facilitates the interpretation of tabulated responses.

Survey data were collected through an online survey hosting service then downloaded and stored locally on a PC with password protection. The investigator was the only person with access to the stored data. Survey responses were assigned a four-digit numeric code for identification and cannot be linked to an individual; stored data are not associated with any identifying information.

The survey was launched on March 23, 2011. Potential participants received an emailed invitation or message board posting that included a survey link and was sent from a password-protected email account created and used solely for the collection of research data. Informed consent was obtained from each participant before the survey was opened (Appendix E). The invitation linked potential participants to an informed consent form that had to be accepted to allow the participant to continue to the survey.

Reliability and Validity

*Reliability* refers to the consistency of a research instrument; *validity* relates to the attribution of meaning to the data collected with that instrument (Doyle 2009, 100). A research project’s validity is generally considered in two forms: internal and external validity. A study is internally valid if it tests what the researcher intended to test, and it is externally valid if the
findings may be generalized from the study’s participants to the larger population. Traditional measures of reliability and validity are appropriate for quantitative research; Lincoln and Guba propose variations on these criteria for the assessment of naturalistic inquiry. These variations maintain an insistence on the “trustworthiness” of research but are more appropriate for gauging the soundness of qualitative research (Lincoln and Guba 1981, 294-301). Lincoln and Guba’s evaluations of credibility (whether the research findings represent an appropriate interpretation of the data) and transferability (how well the findings can be applied or transferred to other situations) are better suited to the current study than the traditional concepts of internal and external validity.

Credibility was addressed through the use of two independent coders who assessed the qualitative data; the investigator consolidated the two sets of codes for interpretation. Transferability was addressed in two ways: by providing detailed descriptions of the participant pool and by restricting the unit of analysis to a single case study. The investigator did not intend to generalize the findings to the broad population of genealogists and will not do so.

This study sought reliability through the use of a survey instrument that implemented a static set of questions. Because each participant saw the same questions as every other participant, the survey was more consistent than, for example, an unstructured interview in which questions may vary from one interview to the next. The study’s closed-ended survey questions are a consistent and reliable way to capture quantitative data.

Data Analysis

Findings from case studies can be used to make causal inferences (Yin 1981, 98). Data were analyzed to discern the patterns of adoption within the case study group in order to
formulate responses to the research questions. The majority of the data was collected using ordinal scales and open-ended comments. Qualitative data collected via comment boxes were coded thematically. Two independent coders identified themes in participant responses. Content analysis was employed to identify patterns or trends within responses to particular questions; occurrence and co-occurrence of themes were noted. Chapter 4 will describe the findings derived from this study. Chapter 5 will discuss the findings and provide a contextual interpretation of the diffusion of Internet research among the Ancestry.com case study group.
CHAPTER 4
RESEARCH FINDINGS

This chapter presents the findings of a case study of users of Ancestry.com, selected as a group representative of the community of practice (CoP) of genealogists who use the Internet. An overall picture of the diffusion of Internet adoption among members of this Ancestry.com case study is presented. The findings are then grouped according to the research questions introduced in Chapter 1, guided by the theoretical constructs of diffusion of innovation (DoI) theory as described in chapter 3. The survey questions used to address particular issues are included in parentheses; for example, (Q4) represents survey question 4. The questions relevant to each RQ are presented in accompanying tables; the full survey instrument is included in Appendix D.

Key Concepts

Five key concepts were examined in this investigation of ways the Internet has impacted the community of genealogists. Use\(^1\) refers to the employment of an innovation to meet a need. In this study, the innovation is use of the Internet for genealogical research. Ease of use refers to the innovation’s complexity. Users are the potential adopters of an innovation as they proceed through the stages of the adoption meta-process. Compatibility refers to the appropriateness or fit

\(^1\) *Use* was not defined in the survey; participants were allowed to interpret the term for themselves.
of the innovation to the need and to the user’s abilities. Time encompasses both the point of adoption and the length of trial.

In sum, the user experiments with an innovation to assess its appropriateness to a need. This involves communication with members of a peer group during the innovation’s trial, leading up to the decision of whether to adopt. In this case, the user is a subscriber or former subscriber to Ancestry.com and a member of the present case study. In this study the innovation is use of the Internet as a genealogical resource; communication takes place via email, messaging services, mail, telephone, and face-to-face encounters within the CoP, the peer group of genealogists. Members of this CoP experiment with various online genealogical resources, including Ancestry.com, during a trial process, through which they reach the decision of whether to adopt. DoI theory serves as a framework to examine the phenomenon of the adoption process.

Ancestry.com Case Study: Overview

Users of Ancestry.com provide a case study of genealogists who use the Internet for genealogical research, the CoP examined in this study. Ancestry.com is a fee-based online genealogical resource that claims more than 1.6 million subscribers and provides access to more than eight billion historical records and more than 30 million user-submitted family trees (Ancestry.com 2011). This case study comprises 887 genealogists who use the Internet for genealogical research and are users of Ancestry.com. The case study method enabled the
application of DoI as a lens through which to investigate the practices of a specific subset of the CoP: those who use a fee-based online genealogical resource.

Demographic data such as age, education level, and geographic location were collected. More than half (62.1 percent) of the participants were 51 to 70 years of age. Median age was 57; the youngest participant was 20 years old, and the five eldest\(^4\) participants were older than 86. The majority of participants (71 percent) reside in the United States, and 75.7 percent were female. Most participants had earned a college degree (Figure 3); 15.5 percent reported having attended “some college”; 33.4 percent of respondents held a bachelor’s degree, and 34.4 percent held a degree beyond the bachelor’s degree (either a master’s, doctoral, or professional degree). “Other” responses included professional certifications and degrees awarded by non-U.S. institutions; these designations are not included in the count of degrees held by participants.

\[ \begin{array}{cccccccc}
\text{Other} & \text{PhD} & \text{MD/JD/other professional degree} & \text{Master’s degree} & \text{Bachelor’s degree} & \text{Associate’s degree} & \text{Some college} & \text{High school diploma} & \text{Some high school} \\
\hline
0\% & 5\% & 10\% & 15\% & 20\% & 25\% & 30\% & 35\% \\
\end{array} \]

**Figure 3. Participants’ education levels.**

\(^4\) The earliest birth year available in the survey was “before 1925,” selected by five participants.
The length of participants’ tenure as genealogists was obtained through responses to Q1 (see Table 1). The median year for initial genealogical research was 1990. Q2 sought to determine participants’ initial year of using the Internet for genealogical research: 63.3 percent began using Internet before 2000 and 19.2 percent commenced online genealogical research before 1994 (Appendix F, Table A3).

Relative Advantage of the Internet

An innovation must provide a benefit that improves the user’s experience -- such as reducing a task’s cost or difficulty -- or it will be unlikely to replace the existing tool or process. The Internet’s relative advantage was referenced by numerous participants; 3 participants indicated their assessment of the usefulness of online genealogical research by posting one word: “Essential.” The relative advantages of Internet research over traditional offline methods of information-gathering may be distinguished as follows.

The relative advantage of the Internet as a genealogical research tool is visible when the frequency of genealogical research activity is examined (Figure 4). Current offline research and pre-adoption research show similar frequency levels, but the frequency of online research activity is dramatically higher. Whereas fewer than 10 percent of respondents report daily offline genealogical research, almost 50 percent indicate daily online research activity.

Ease

Before Internet adoption, genealogists spent considerable resources traveling to archives, courthouses, and cemeteries to compile information about ancestors; with online source material scanned documents can be electronically searched and its image can be linked (e.g., via URL) to a record in a family tree. As one participant said, “I don't think younger or newer researchers
realize how challenging it was to eke out information from the census and other sources” before online access became available (Participant 0504).

**Speed**

Because *ease* was not defined in the survey, high ratings for ease of use may include the concept of time-saving. Speed is corollary to the effort required to compile genealogical data before the Internet; “what used to take days or months [traveling and compiling], now takes minutes on the Internet” (Participant 1007). One young mother noted, “I am still raising a generation of the living, so Internet research means that I can pursue research when I can’t leave the house” (Participant 0728).

**Access**

Online access provides genealogists the opportunity to view and use material located in a different geographic area. “With access to more and more databases, the Internet gets more and more important. It is now much easier to work on an international scope” (Participant 0550).
In LIS research the concept of *access* is generally used to refer to a patron’s ability to obtain materials. A related term, *accessibility*, refers to the overall availability of a tool or space to all potential users. The Internet improves both types of access; as one participant explained, “I became disabled in 1994 and will always find it difficult to use libraries and archives, so Internet resources have meant I can carry on my research.” (Participant 0225). One respondent noted the benefit of home access to information provided by the Internet: “Since I am now house bound, it is my all, beyond what I have amassed” (Participant 0043).

**Trialability**

Participants are able to use Ancestry.com and other fee-based online genealogical resources on a trial basis before committing to purchasing a subscription. Alternatively, an Ancestry.com trial may be employed using an institutional subscription to Ancestry Library Edition.

The other attributes described by DoI theory -- complexity, compatibility, and observability -- are discussed in the context of their relevance to the RQs.

**Categories of Adopters**

Rogers’s five categories of adopters -- innovators, early adopters, early majority, late majority, laggards (Rogers 2003, 22) -- are described in chapter 3 (Figure 1). The year of participants’ initial use of the Internet for genealogical research was collected (Q3). To understand how the members of this case study fall along the spectrum of adopters, one must consider the general timeline of adoption of the Internet for all purposes. Although it had been
developed many years earlier, the Internet was not in household use before the World Wide Web was launched in the early 1990s.

The earliest timeframe participants could select to indicate year of initial online genealogical research was “before 1994”; 157 (17.7 percent) selected this option; these are the innovators and early adopters\(^5\) (Appendix F, Table A.3). To help interpret the significance of beginning to use the Internet for research before 1994, one must recall that in 1993, America Online claimed 500,000 subscribers. That number doubled the following year (America Online 1993, America Online 1994). In 1994 Netscape Navigator was a newly launched browser for accessing the newly launched World Wide Web, and Google was still four years away from its prototype’s 1998 launch (Mosaic Communications 1994, PC World 1998). The Internet as it appears in the 21st century was in its infancy when this study’s innovators and early adopters began using it for genealogical research.

At the latter end of the adoption spectrum, 135 (15.2 percent) have only been using the Internet for genealogical research since 2004. These appear to be laggards, based on Rogers’s normal distribution, but one key factor must be considered before that determination is made: When did these users begin researching genealogy, online or offline? For example, a user who began conducting genealogical research in 2008 should not be considered a laggard for also commencing online genealogical research in that year.

Thirty-two study participants had been involved in genealogy for five or more years before adopting the Internet for genealogical research in 2005 or later. Of these, 26 provided a birth year; their age range is 33 to 69 years (median age is 61 years). The range of years of

\(^5\) It is not possible to discern the innovators from the early adopters within this group of users. Although 1994 is an early year for the World Wide Web, the innovators and early adopters within this CoP indicate use of the Internet in some format considerably earlier. Following Rogers’s bell curve of adoption rates, those who adopted in 1994 should be considered early majority.
experience conducting genealogical research is 6 to 44 years (median duration of experience is 21 years). The median age of all study participants is 57, so the average laggard is slightly older than the average participant.

On the other end of the spectrum, the innovators and early adopters range from 30 to more than 86 years of age, with a median age of 61; the first and the last adopters share this median age. Although it would be convenient to be able to generalize that the laggards tended to be older while the early adopters were younger, no such pattern emerged from the data. The different adopter categories comprise members of all ages.

A cross-tabulation of research frequency and age reveals that among users who conduct offline research at least once per week, participants fall along a relatively normal curve, with the majority of users at the middle of the range (Figure 5.2). The age range is almost 70 years, from 19 to older than 86. Median age is 59 years. Again, there is not a discernible association between age and research activity level.

Library-related usage patterns emerge in an examination of participants’ utilization of institutional subscriptions to online genealogical resources such as Ancestry Library Edition. The majority of earlier adopters (91.4 percent of innovators/early adopters and 92 percent of early majority) use free access to this type of resource provided by a library. Of participants in the late majority category, 85.7 percent report using library access to online genealogical resources, and for laggards the percentage drops to 83.7 percent. In addition to their use of online resources, participants’ estimations of the frequency with which they would genealogical research if they did not have Internet access to resources suggest that libraries and archives should continue to maintain offline materials.
Among 60 study participants who no longer subscribe to Ancestry.com personally, 20 provided comments citing cost as a reason for canceling. Of these 60, 36 adopters use Ancestry Library Edition; the remaining 24 participants no longer subscribe to Ancestry.com in any form (Q5). These 24 individuals do not maintain a personal subscription, nor do they use Ancestry Library Edition through an institutional subscription. This represents a 2.7 percent non-adoption rate for Ancestry.com. The most frequent reason given for not adopting this innovation was cost.6

The Internet has a wide-reaching influence on genealogical research. Along with increasing the speed and ease of conducting research, online access to materials allows housebound genealogists to continue their research activities, as evidenced by comments from participants in this case study. Internet adoption has changed the methods used to access information but has not replaced offline research activities for the majority of study participants.

RQ1: How Does Use of Online Genealogical Resources Impact Genealogical Research?

The Oxford English Dictionary (1989) defines impact as “the effective action of one thing or person upon another; the effect of such action; influence; impression.” In this study, the impact of online resources is operationalized as the effect of the use of the Internet on genealogists’ research behaviors. To collect data regarding the influence of the Internet on genealogy, the survey instrument included questions about participants’ sense of usefulness, ease

6 An additional 30 case study participants indicated cost as a reason for canceling a subscription to an online service other than Ancestry.com.
of use, and accuracy of resources obtained via the Internet. The same questions were asked in relation to participants’ current experience with offline resources as well as their pre–Internet adoption research experience, providing comparative measurements for interpreting responses relating to Internet use.

Several questions included Likert scale response options, accompanied by descriptors for the high and low ends of the seven-point scale used. These descriptors -- useful, easy to use, and confident -- were not defined in the survey. Participants used their own definitions of these
terms. A rating of 1 was always the lowest selection, and a rating of 7 was always highest. The option for “not applicable,” N/A, was offered where appropriate.

The Internet as a Genealogical Tool: Usefulness

The assessment of relative usefulness informs the adoption decision process as a conclusion drawn from experimentation during the trial process. A high rating of an innovation’s usefulness helps satisfy one of Rogers’s criteria for adoption: compatibility. Compatibility entails social appropriateness, as discussed in chapter 3, but for a CoP to adopt an innovation, it must also be appropriate to fulfilling a need. Appropriateness and suitability are components of compatibility, and for a technological tool such as the Internet, usefulness is a significant contributor to both appropriateness and suitability.

Three questions were posed to measure participants’ attitudes regarding the usefulness of the Internet, libraries, and archives in their genealogical research. The majority (61.7 percent) of participants rated the usefulness of the Internet (Q3) as 7, “very useful.” Libraries and archives received similarly high ratings: libraries (Q18) were rated 7 by 52.1 percent and archives (Q20) were rated 7 for usefulness by 50.3 percent of respondents. All three methods of access -- the Internet, libraries, and archives -- garnered a majority of high ratings. On the low end of the usefulness scale, the Internet was rated 1, 2, or 3 by only 2.0 percent of respondents; 5.5 percent and 6.4 percent of respondents gave those low ratings to libraries and archives, respectively. Another 43 (4.9 percent) indicated no use of libraries, and 92 (10.4 percent) reported no use of archives.

7 The usefulness of resources found in libraries was rated “do not use” by 4.9 percent of respondents; 13.7 percent gave a rating of “do not use” for the usefulness of resources found in archives.
Another of Rogers’s attributes for adoption, also discussed in chapter 3, is complexity. In terms of online access to genealogical resources as an innovation, complexity is hinged upon users’ sense of the innovation’s ease of use. For any CoP to embrace a technological tool for accomplishing research tasks that had been done successfully offline for many years, the tool must be perceived as sufficiently easy to use to merit the potential investment of time, money, and energy required for adoption.

Part of the Internet’s relative advantage, along with its ease and speed for providing access, is its relatively low complexity. Data concerning perceived ease of use were collected via participants’ ratings of ease of use of the Internet (Q23), libraries (Q24), and archives (Q25) as sources of genealogical materials (Figure 6). The majority rated ease at the “very easy” end of the scale, for all three sources of genealogical information -- the Internet (93.9 percent), libraries (83.5 percent), and archives (70.3 percent).
However, examining only the highest rating reveals that more than half (51.9 percent) of respondents rated the Internet as 7, “very easy,” while 28.7 percent rated libraries at 7 and 19.4 percent rated archives at 7 for ease of use as a genealogical source. The percentage of participants who gave the Internet the highest rating for ease of use as a genealogical resource was more than double that of archives and almost twice that of libraries.

Adoption of Ancestry.com

Data relating to participants’ adoption of Ancestry.com were collected through closed-ended questions (quantitative) accompanied by optional comments (qualitative). Using the proposed definition of users provided in chapter 3, meaning a person who experiments with a new tool to determine its appropriateness to a need, all of the case study participants are considered users of Ancestry.com. Among users are subscribers and non-subscribers; some users of Ancestry.com, for example, may not hold a personal subscription to the service but are still active users through some other means of access.
Thirty-seven participants (4.2 percent) indicated use of Ancestry.com via a library’s institutional subscription to Ancestry Library Edition (Q6). Ancestry Library Edition includes access to a reduced range of materials found on Ancestry.com (Ancestry Library Edition 2012). Among these 37 users are 15 former subscribers to paid sites, including Ancestry.com, who canceled an at-home subscription⁸ and now only use library access to Ancestry.com.

Sixty participants no longer subscribe to Ancestry.com (Q5); of these former subscribers, 36 (60.0 percent) report use of institutional access to Ancestry Library Edition. The remaining 24 participants who no longer use Ancestry.com in any format are considered non-adopters. This represents a 2.7 percent non-adoption rate among participants who continued through the process beyond the trial stage. Not included in the case study are genealogists who have never subscribed to Ancestry.com but who may have participated in a promotion⁹ without subscribing.

Comments from 39 (65 percent) of the 60 participants who canceled an Ancestry.com subscription include reasons for cancelation. Frustration and lack of time were mentioned by 9 (23.1 percent) of non-subscribers who provided an explanation, including, “I hit a number of roadblocks in my search” (Participant 372) and “Wasn’t able to use it regularly” (Participant 1135). Twenty (51.3 percent) of the non-subscribers who provided an explanation for their cancelation cite cost as a reason for not continuing to subscribe to the service, including this comment: “Received plenty of information at Ancestry.com but too expensive for me to continue” (Participant 0925).

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⁸ Ten of these 15 users of Ancestry Library Edition indicated having canceled a personal subscription to Ancestry.com. The remaining 5 users do not indicate the service to which they no longer hold a subscription.

⁹ Ancestry.com offers free trials of varying lengths to prospective subscribers.
Accuracy of Online Resources

To investigate the issue of compatibility, data were obtained relating to users’ attitude toward information obtained online and offline. Participants were asked to rate their confidence in the accuracy of materials by access source. Using a Likert scale from 1, “not confident,” to 7, “very confident,” the majority (55.7 percent) of users rated their confidence in the accuracy of material obtained online as 4 or 5 (Q46). The majority of participants gave a rating of 4 to their confidence in the accuracy of online resources (Figure 7). These mid-range ratings represent a neutral attitude; with 4 as the midpoint of the scale, a rating of 3 to 5 indicates a somewhat less confident position (3), a neutral position (4), or a somewhat more confident stance (5).

![Figure 7. Attitude toward accuracy of information obtained online and offline.](image)

A rating of 4, the midpoint of the scale, may have been selected by participants who did not feel the question was applicable, although Q47 included an option for “not applicable” (N/A), and participants were allowed to skip any questions they did not feel was appropriate to
their experience. Q46 did not include an option for “not applicable,” because all participants use online genealogical resources. Accompanying comments make clear that the preponderance of mid-range ratings do not reflect apathy. Rather, these ratings more likely reflect the generality of “lumping the entire Internet into one package” (Participant 0409).

One participant who rated low confidence in accuracy as 2 described her confidence level as “Not very, unless I can get a digital copy of an actual document online” (Participant 0024). Several participants also commented on the types of factors that impact their sense of accuracy, including whether materials were obtained as scanned images versus transcriptions. The indication of a moderate level of confidence in the accuracy of a resource obtained online suggests a compatibility issue; Rogers notes that societal norms impact the notion of compatibility (Rogers 2003, 15). Users reported being more confident in the accuracy of materials obtained offline. Asked to use a Likert scale rating to indicate their attitude about the accuracy of materials obtained offline (Q47), the majority (59.8 percent) of participants rated their confidence as 5 or 6. The majority assigned offline resources a rating of 6 (Figure 7).

Pre-Internet information sources included information respondents could gather themselves (such as oral histories and cemetery transcriptions) as well as compiled information: 701 (66.6 percent) of 1,052 respondents selected self-collected oral histories. Obituaries (654, 62.2 percent), census records (597, 56.7 percent), newspaper articles (575, 54.7 percent), and published genealogies (528, 50.2 percent) completed the list of the top five pre-Internet sources (Table A2, Appendix I).

Several participants noted that their confidence in the accuracy of any material is based on type of material being accessed, not the means of accessing it. These users indicated similar
confidence levels for digitized original records accessed via the Internet as for microfilmed or original documents accessed offline.

Frequency of Use of Genealogy Resources

Participants’ use of online and offline genealogy resources were quantified using several questions. Data regarding frequency of online and offline research were collected through responses to two questions (Q30, Q31) and was compared with data relating to research conducted prior to Internet adoption (Q33). The frequency with which participants conduct genealogical research has increased since they began using the Internet. Whereas 22.6 percent of respondents reported researching at least as frequently as three days per week before adopting the Internet for genealogical research, 77.9 percent report currently conducting online research at least as frequently as three days per week, with 46.6 percent indicating current daily research (Figure 8).

Figure 8. Frequency of current genealogical research, online and offline.
The percentage of respondents currently conducting offline research at least three days per week was almost two percentage points lower than reported pre-Internet frequency (22.6 percent pre–Internet adoption vs. 20.9 percent currently). The majority (58.6 percent) of participants who conducted research prior to Internet adoption did so less frequently than twice per month. Only 52 (7.6 percent) indicated they conducted such research every day before adoption of the Internet as a genealogical research tool. The mode was “once or twice per month” (218, 32.0 percent), with another 181 (26.6 percent) indicating they conducted genealogical research less frequently than once per month before they began using the Internet; 21 (2.4 percent) do not currently conduct offline research (Table 2).

<table>
<thead>
<tr>
<th>Research conducted ONLINE</th>
<th>Research conducted OFFLINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every day</td>
<td>9.3%</td>
</tr>
<tr>
<td>Three or more days per week</td>
<td>11.6%</td>
</tr>
<tr>
<td>Once or twice per week</td>
<td>21.1%</td>
</tr>
<tr>
<td>Once or twice per month</td>
<td>33.6%</td>
</tr>
<tr>
<td>A couple of times per year</td>
<td>22.0%</td>
</tr>
<tr>
<td>I do not conduct research offline</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

Participants were asked to estimate how frequently they would engage in genealogical research if they did not have access to the Internet (Q69). The majority (90.6 percent) indicated they would still be researching at least once per year; 24.4 percent indicated they would conduct research more than once per week. However, 6.8 percent indicated that they would not be conducting genealogical research at all if they did not have access to online resources.
Among participants who estimated their genealogical research would continue if the Internet were no longer an optional research tool, several comments reflected the variety of sentiment accompanying their responses: “It would probably depend on how close I lived to a really ‘good’ library. I think the internet has fueled my passion in the past ten years for sure” (Participant 0625).

The influence of the Internet on genealogical research is manifested across several aspects of the researcher’s experience. An examination of study participants’ involvement with

### Table 3. Survey questions relating to RQ2

<table>
<thead>
<tr>
<th>Q7</th>
<th>Do you participate in online genealogy message boards?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q10</td>
<td>Do you participate in genealogy email list groups?</td>
</tr>
<tr>
<td>Q34</td>
<td>Had you been asked, would you have been willing to share information you found BEFORE you began using the Internet as a genealogical reference tool?</td>
</tr>
<tr>
<td>Q36</td>
<td>On average, how often did you receive information from another family history researcher BEFORE you began using the Internet in genealogical research?</td>
</tr>
<tr>
<td>Q37</td>
<td>On average, how often did you provide information to another family history researcher BEFORE you began using the Internet in genealogical research?</td>
</tr>
<tr>
<td>Q38</td>
<td>How do you communicate with other researchers? Check all that apply:</td>
</tr>
<tr>
<td>Q39</td>
<td>How often do you receive information from another researcher ONLINE, on average?</td>
</tr>
<tr>
<td>Q40</td>
<td>How often do you provide information to another researcher ONLINE, on average?</td>
</tr>
<tr>
<td>Q41</td>
<td>Since you began using the Internet for genealogical research, how often have you received information from another researcher OFFLINE, on average?</td>
</tr>
<tr>
<td>Q42</td>
<td>Since you began using the Internet for genealogical research, how often have you provided information to another researcher OFFLINE, on average?</td>
</tr>
<tr>
<td>Q43</td>
<td>Have you ever encountered another researcher who was unwilling to share information?</td>
</tr>
<tr>
<td>Q44</td>
<td>Approximately when did you encounter a researcher who was unwilling to share information? Was an explanation given?</td>
</tr>
<tr>
<td>Q45</td>
<td>Which of these words could you use to describe your relationships with other family history researchers? Check all that apply:</td>
</tr>
<tr>
<td>Q46</td>
<td>In general, how confident are you in the accuracy of material you retrieve ONLINE?</td>
</tr>
<tr>
<td>Q47</td>
<td>In general, how confident are you in the accuracy of material you retrieve OFFLINE?</td>
</tr>
<tr>
<td>Q62</td>
<td>Have you published any of your genealogical research online (e.g., a family tree Ancestry.com)?</td>
</tr>
<tr>
<td>Q63</td>
<td>Other than material published online, have you ever published any of your genealogical research?</td>
</tr>
</tbody>
</table>
resources both online and off, as well as their pre-Internet research experience, allows for an understanding of the impact of Internet access and online genealogical resources on the practice of genealogy. These findings will be further discussed in chapter 5.

**RQ2: How Do Online Genealogical Resources Support Interaction Among Genealogists?**

Participants reported more current communication with other genealogists than before they began using the Internet for genealogy. Opportunities to share information and to work together have increased along with the rise in communication. This assessment of communication habits is drawn from responses to questions pertaining to the direct exchange of information with other individual researchers, as well as the posting of information via online genealogy message boards or groups and/or the publication of research. Participants’ attitudes toward online communication appeared in comments throughout the survey. These genealogists use electronic communication to enhance their research experience in multiple ways.

**Willingness to Share Information**

Genealogists’ willingness to exchange information with other genealogists was investigated through responses to three survey questions. These responses reflect complex relationships among members of this CoP; respondents mentioned both encountering other genealogists who were unwilling to share information as well as describing situations in which he or she was unwilling to share with others.

More than half (58.4 percent) of this study’s participants have encountered another researcher who was unwilling to share information (Q43). Of the 420 who provided a date for
the first such incident, 113 (26.9 percent) selected “before 1990”; When asked for the date of the most recent encounter with a researcher unwilling to share, 110 (26.2 percent) indicated 2011. Thus the incidence of encounters with unwillingness to share information neither ceased nor markedly decreased with the adoption of the Internet as a research tool.

An unwillingness to “air dirty laundry” or discuss “skeletons,” “black sheep,” or memories that are “too painful” was mentioned by 10 (1.1 percent) respondents. More commonly, though, the reason given for refusal to share was the other researcher’s sense of ownership of the material, desire for credit, and/or sense that “[she] had done all of the work and thought everyone else should do the same.” In all, 59 comments reflected this explanation for the refusal of another researcher to share. Several of them stated this fact quite plainly: “Some people do not want to share because they think you should have to find it yourself” (Participant 0158).

Occasionally, researchers are simply unfriendly or rude, with no clear explanation given. As one respondent explained, “Most are cordial...but some are difficult, especially when your research overlaps what they consider to be ‘their’ tree. My research group has had exceptionally bad experiences with one person who constantly posts messages” (Participant 0233).

Although these numbers do not indicate a significant shift in the incidence of encounters with researchers who refuse to share material, participants’ comments help illustrate a pattern in these behaviors. Several participants noted that often a genealogist who is seemingly unwilling to share may, in fact, simply be unresponsive. “Some folks are lazy, don't follow up, or have reasons to keep their family secrets” (Participant 0666). Many of the comments relating to “unresponsive” genealogists included a date of most recent occurrence; 25 (89.2 percent) indicated 2005 or later. Thus in at least a portion of cases the reported unwillingness -- which
would be more accurately described as a lack of response -- occurred during the time in which most researchers were using the Internet.

Internet adoption, therefore, has facilitated communication between genealogists. Participants in this case study report greater frequency of communication with other genealogists than occurred prior to Internet adoption. Participant comments indicate an overall favorable attitude toward the role of the Internet in communication with other genealogists and suggest that collaboration may be occurring more frequently than before Internet adoption.

**Communication Channels: Use**

Prior to their adoption of the Internet, genealogists who communicated with one another did so using multiple communication channels. Writing letters and making telephone calls to other genealogists, attending meetings or conferences, and face-to-face visits could all be used by one individual to communicate with other genealogists (Q36, Q37). Just as they used multiple methods of communicating before they began using the Internet, participants currently employ multiple means of communication with other researchers, in both digital and analog formats (Q38).

The most commonly reported frequency for receiving information from other genealogists before the Internet was “a few times per year,” selected by 276 (31.1 percent) respondents. Regarding current information exchange, mode frequency for receiving information offline remains “a few times per year,” selected by 359 (40.4 percent); mode frequency for receiving information online, however, is “more than once per week,” with 192 (21.6 percent) participants. Information was reported to be received online once per week by 175 (19.7
percent), meaning 367 (41.4 percent) participants receive information online at least as frequently as once per week.

Providing information before the Internet and current provision of information followed a similar trend. The most commonly reported frequency for the provision of information prior to Internet adoption was “a few times per year,” with 263 (42.2 percent) respondents. The most commonly reported frequency for current offline provision of information is “a few times per year,” with 361 respondents, and current online information provision also has a mode frequency of “a few times per year,” with 235 (26.5 percent) responses.

Communication Channels: Frequency

A change in the frequency of communication was reported by the majority of participants, regardless of whether their patterns of communication had changed\(^{10}\). Survey questions were used to elicit information regarding current patterns of receiving information from other genealogists and of providing information to others online (Q39, Q40) and offline (Q41, Q42).

Several participants indicated changes in their communication patterns since Internet adoption; 104 (11.7 percent) reported that they did not communicate with other researchers before they began using the Internet. Of these, 65 (62.5 percent) indicated they currently receive information from other researchers online at least as frequently as once per month, and 64 (61.5 percent) indicated they provide information to other researchers online at least as frequently as once per month (Figure 9). Two (1.9 percent) of these respondents indicated they do not communicate with other genealogists.

\(^{10}\) As noted above, Q38 elicited information regarding patterns of communication and found consistency across usage patterns from pre–Internet adoption behaviors to current methods of communication.
Other Means of Communication within CoP

This study investigated communication in two contexts: the direct exchange of information with other individuals (usually private) and the sharing of information using online genealogy message boards or email lists (usually public or semi-public). Within the public or semi-public realm of email lists and message boards are two types of communication: passive and active. Blanchard and Markus (2004, 70) identified three user types among message board members: leaders who frequently post, participants who occasionally post, and lurkers who read but do not post. They further distinguish participation by style: active versus passive. “Active participation is defined as posting and responding to messages. Leaders and participants engage in active participation. … Passive participation, then, is merely reading the messages” (Blanchard and Markus 2004, 71). As read-only members, lurkers are passive participants.

Figure 9. Frequency of current online communication among participants with no pre-Internet communication with other genealogists.
Blanchard and Markus define posting messages that are visible to the entire group as public participation; personal email messages are considered private participation (71).

Public or semi-public communication channels such as message boards and email lists allow the exchange of information to take place in a semi-public domain. Unlike email messages, which are generally restricted to the view of sender and receiver, messages posted to a board or list are available for members of the community to view. These messages are usually broadcast within a group of users and may also be located via an online search engine. In addition to facilitating the fulfillment of an individual user’s information needs, this is an additional way to communicate and is used to serve public needs as well.

In relation to their use of message boards and email lists, this study’s participants were categorized as post/respond, which matches Blanchard and Markus’s active participation style, and read-only members, which corresponds to Blanchard and Markus’s passive participants. Use of genealogy message boards (Q7) and email list groups (Q10) was reported by the majority of participants; 778 (87.7 percent) read and/or post information on genealogy message boards, and 680 (76.7 percent) participate in genealogy-related email list groups (Figure 10).

Another way genealogists share information broadly is via the publication of their

![Figure 10. Participation in message boards and email list groups.](image-url)
research, either online or offline. The survey included questions relating to the online publication of research outcomes such as family trees (Q62) as well as non-Internet publications; 529 (62.5 percent) participants indicated having published research online. For offline publication (Q63), 508 (57.3 percent) indicated they have not published any research other than online.

Roles of and Relationships with Other Genealogists

Attitudes toward communication and collaboration were assessed via questions that queried participants regarding the roles, if any, they consider other genealogists to play in their own genealogical research. Relationships between researchers are often hard to express, even for the researchers themselves. One scholar may consider another to be a collaborator while that “collaborator” may not reciprocate. Or a researcher might consider another to be simultaneously a colleague and a competitor. These labels have associated connotations that are unique to the individual who applies the term.

Participants selected all that apply from a list including collaborator, colleague, competitor, and other (Q45, Figure 11). The question encouraged respondents to explain or give examples if they selected “other.” Overall the response indicated more collaboration than competition; 596 (67.2 percent) selected “collaborator” as a possible descriptor. “Colleague” was selected by 568 (64.0 percent) of respondents who chose at least one word. “Competitor” was chosen by 82 (9.2 percent); 68 selected both “collaborator” and “competitor,” and 68 chose “colleague” and “competitor.” In the comment field that accompanied Q45 and allowed participants to clarify or list other terms they use to describe their relationships with other genealogists, the word “family,” “cousin,” or “relative” was used by 12 respondents, “friend” was used by 10 respondents, and “mentor” was used by seven respondents.
One participant who selected collaborator explained the word choice with comments:

“We all feel that each one of us has something to contribute to the whole” (Participant 0327).

“My cousin and I are in this together” (Participant 0668). One participant explained the value of collaborating as follows: “Sharing research with other experienced genealogists keeps you on the straight and narrow -- having to justify your findings to someone else means you examine it much more critically than perhaps you would otherwise” (Participant 0616).

![Bar chart showing the number of responses for different terms](image)

**Figure 11. Terms used to describe other genealogists (select all).**

Individual respondents’ perception of other genealogists as competitors was explained and clarified through comments such as this one, from a participant who selected both collaborator and competitor: “Most relationships are collaborative, but there are those who are amassing numbers, not facts, or those who don’t like to be corrected. Those are competitive relationships” (Participant 0386). One participant who selected all three terms noted a particular situation in which competition exists among colleagues and collaborators: “In some mailing lists, there is often competition to ‘show off’ your knowledge, to be the first one to solve someone’s problem, to have developed a more comprehensive resource about some topic.” Another said,
“Sometimes it’s a race to find the gold mine.” Personalities play a role in the designation of terms for other researchers: “Competitor with a cousin who does not share, Colleague and Collaborator with many others.”

The dynamics of this CoP’s social system are loosely held in place by these labels. One genealogist’s sense of the role of other researchers in his own work -- whether competitive, collegial, or both -- positions members of the CoP in relation to one another. The language used frames the connection between the two individuals.

Collaboration and Sharing

Rioux describes a common information-seeking experience that appears to be a recurring behavior among this study’s participants: Researchers frequently “encounter information in Internet contexts that addresses their own information needs as well as those of others, and that this information is typically shared in some way (typically via e-mail)” (Rioux 2005, 169). This type of behavior is also exhibited by Fulton’s “super sharers,” i.e., researchers who are willing to share their skills and expertise with “both related and unrelated genealogists” (Fulton 2009b, 761).

Many of this study’s participants demonstrate a willingness to share made clear in comments such as, “I share techniques as well as information” (Participant 0677). Another explained, “I’m a volunteer on two separate genealogy websites, looking up obituaries and taking photos of headstones for people who ask. I often seek out posts on message boards requesting these services, too, and provide them with information I can find” (Participant 1123).

These participants’ activities and attitudes mirror those of the online journalism message board examined by Millen and Dray (2000). That resource provided opportunities for its
participants to engage in technique/advice sharing and source/information sharing (Millen and Dray 2000, 171). Millen and Dray describe the message board members as being committed “to helping others and sharing information” and that their resulting conversation “creates a valuable collective good in the archive of public discussion” (173).

The concept of creating a “collective good” applies more to the activities of online groups such as message boards than to the individual information exchanges that take place via email. Although the survey asked participants to qualify their message board and email list group activities by whether they post and respond or simply read the postings of other participants, clarification of level of involvement within one-on-one email correspondence was not sought. One relevant theme that becomes clear when analyzing comments regarding researchers who refuse to share information is the nature of the distinction between uncooperative and unresponsive; 77 comments described a lack of response to direct requests for information or research assistance. Had these requests been made in a public forum rather than via email, perhaps a reply would have come from a “super sharer.” Reluctant researchers described as “too busy, too ill, too whatever to look through their records” (Participant 0311) would not have been relied upon for assistance had the request been made to a broader audience.

Fulton found that “helping one another was considered community participation” by the amateur genealogists she studied, and that “lack of reciprocity was problematic” (Fulton 2009b, 764). As one participant in the present study commented, “Generally, I find other researchers very generous in sharing info. I always try to reciprocate” (Participant 0111). Another participant noted that other genealogists are “generally willing to cooperate and share. Only rarely is one uncooperative. They are willing to take but not give” (Participant 0818).
This concern about reciprocity in information sharing recurred throughout the survey. Some comments included examples of types of information and situations in which information was given but not reciprocally returned, including instances where the study participant was the unwilling party: “I can tell you I hesitate [to share information] in today’s world, due to the fact that people will use it to add to a website that requires payment to retrieve the information, which I totally disagree with” (Participant 0578). Another participant explained her own cautious approach to sharing as follows:

“I will not release a GEDCOM of ALL my research (which has been requested MANY times) because I have found these are lazy people with other motives. I WILL engage in a conversation to narrow the focus (Are we related? How? If not, how does my research help you?) and will provide information that simply answers the question. Generally those who will not share information disappear without finishing the conversation” (Participant 0081).

Chapter 5 will discuss the findings from the case study and provide an interpretation of the diffusion of Internet research among the Ancestry.com case study group. The two foundational research questions will provide the context upon which to structure the discussion, Themes identified within this data are discussed and their application to future research are proposed.
CHAPTER 5
DISCUSSION

This chapter presents an analysis of the findings from the case study of users of Ancestry.com. The research problem, research questions, and study results are reviewed, guided by the framework of diffusion of innovation (DoI) theory. An interpretation of the findings is then presented, contextualized by the study results’ implications for LIS professionals, LIS educators, and online genealogical resource developers. The chapter concludes with suggestions for future research.

Review of Research Questions and Theory

Genealogists are a community of practice (CoP) in which Internet adoption fosters research and communication practices. Research and communication are not dependent on use of the Internet, but they are supported by the innovation. The extent to which research and communication in genealogy are supported by use of the Internet has not been widely studied. To facilitate this investigation, two research questions (RQs) were posed:

• RQ1. How does use of online genealogical resources impact genealogical research?
• RQ2. How do online genealogical resources support interaction among genealogists?
The findings are interpreted through the lens of DoI theory. The theoretical framework is described in detail in chapter 3; the following is a brief explanation of the application of the key constructs implemented in this study. DoI theory is built around five components that lead up to adoption (or non-adoption) of an innovation: Users, communication, an innovation, trial, and decision. In this case study, the users are Ancestry.com users, and the Internet is the innovation. These users’ adoption of this innovation is enabled by the processes of communication, trial, and decision, all of which are investigated through an analysis of data collected by online survey.

**Study Context: Genealogy’s Online Presence**

The case study comprised users of Ancestry.com, a widely used subscription-based genealogy resource; there are hundreds of thousands\(^1\) of online resources available. The sheer number of genealogy-related resources on the Internet reflects the significance of genealogy as well as the significance of the Internet in family history research. In addition to subscription-based resources such as Ancestry.com, Genealogybank, and HeritageQuest, there are free resources available as well. Rootsweb, Cyndi’s List, and FamilySearch.org are examples of resources that do not require a fee or a subscription.

**Implications for LIS Professionals**

Findings from this study provide insight into genealogists’ interactions with a variety of resources, including several hosted or provided by libraries and archives. The impact of these findings on LIS professionals is discussed here.

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\(^1\) In January 2010 Cyndi’s List, an online index of genealogical websites, had 275,000 links to discrete genealogy resources (Howells 2010)
Usefulness and Ease of Use

Overall, participants find the Internet to be more useful and easier to use than either libraries or archives as genealogical resources. One participant comment acknowledged that the Internet “is a tool, and as with all tools it must be used cautiously” (Participant 1051). Yet another summed up the Internet’s benefits and drawbacks succinctly: “But only if used for the right reasons and with the right skepticism” (Participant 0810). The Internet is “very useful for getting a swift start, but only one tool in a good genealogist's arsenal!” (Participant 0675). Among the other tools are resources such as original documents and records, many of which may be found in libraries and archives.

The majority of participants found libraries and archives to be useful, but almost one in twenty indicated no use of libraries for genealogical research. More than one in ten indicated no use of archives for genealogy. This is a small percentage of study participants, but these same genealogists are frequent researchers. More than half of the participants who selected N/A for libraries’ usefulness indicate they conduct research more than three days per week. These are apparently savvy Internet genealogists who are not using library resources for some reason.²

Several participants noted differences between types of libraries, individual libraries, and individual LIS professionals. “Some [libraries] are more useful than others based on their collections” (Participant 308). The Internet and its variety of resources provide users an endless array of information. Anyone who uses the Internet to conduct research must discern the good information from the bad. Before the Internet, genealogists would most likely have turned to libraries, archives, and genealogical societies for information; the collections housed by such

² Among the associated comments are references to distance and physical inability to travel. Most of these participants did not explain their lack of use of libraries and archives.
institutions would have been carefully selected by trained professionals, experienced researchers, or a combination of both. On the Internet, a researcher must determine the accuracy, reliability, and value of information independently. Several participants in this study identified this responsibility in comments citing the Internet’s usefulness as a tool and means of establishing connections but noting the vigilance required to discern correct from erroneous information.

Because the Internet provides a connected network of resources means users have access to more possible sources than any single repository could hold on its premises; LIS professionals should consider the Internet’s genealogical resources as a tool they can use to expand their repositories’ offerings. This user group finds Internet research to be easier to use than library or archival research, so implementing Internet-based resources into the collection is one way to improve the user experience. Incorporating user input would also raise the level of service provided to this CoP.

Concerns with Accuracy

Despite expressing satisfaction with the overall experience of using the Internet for genealogical research, users reported being more confident in the accuracy of materials obtained offline than those obtained online. Participants also stressed the need for source information and documentation if a record is not original. Although the survey did not ask directly, this response suggests that at least some of the materials obtained offline were obtained through libraries, archives, and special collections.
Looking at the types of resources used most frequently before the Internet (Appendix F, Table A.4) and presuming such materials are still frequently used, participants’ assessment of confidence in these materials’ accuracy reveals a surprising disparity. For the most-used source of pre-Internet information, oral histories, only 201 (22.7 percent) of respondents rated the accuracy of self-obtained oral histories as 6 or 7, “very confident.” The accuracy of the second-most-used source of pre-Internet information, obituaries, was rated 6 or 7 by 330 (37.2 percent) respondents.

Material obtained offline is subject to some of the same types of mistakes as those obtained online, as one participant explained: “The same errors could pop up on an offline record if it were photocopied incorrectly” (Participant 0657). Thus, providers of such resources should ensure that proper documentation (provenance, call number, etc.) is always available to researchers, either online or offline.

A theme appearing in several comments (and explicitly stated by three participants) is, “Trust, but verify.” Participants also commented that their confidence in the accuracy of genealogical materials is based on the type of resource being used, not on the retrieval method employed. Participant comments make clear that this CoP recognizes differences in types of material obtained.

Genealogists who use online resources find the Internet to be useful so long as they remain wary of what they find. There is a wide range of types of material available for download, ranging from digital page images of actual records to pedigrees for which there is no concrete documentation. Several participants noted having stumbled into a (sometimes unfortunate) truth: Information is only as reliable as its source. If the source is unknown, the

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3 The survey did not ask participants about use of particular materials currently obtained offline.
information should not be assumed to be credible, and many study participants indicated this fact in their comments. One participant said, “The challenging part is knowing what is right and what is not” (Participant 1012). Another explained, “Microfilms of original documents inspire confidence; undocumented family material posted by individuals does not” (Participant 0829).

Information providers -- LIS professionals and interface developers alike -- need to recognize that genealogists require source information. Providing descriptive metadata regarding how the original item may be located, such as the physical location of the record or artifact, is a first step toward providing the user a way to validate the accuracy of the information. Providing a scan of the item, as opposed to a transcription or index, also helps the user validate the resource. Participants indicated a much greater level of confidence in the accuracy of online images, as opposed to online transcriptions. Both, however, require descriptive metadata as a means of ensuring validity.

The message here for librarians and archivists is that accurate online genealogical resources are valued by genealogists. LIS professionals are trained to assess the accuracy of potential information sources; by implementing online resources into their collections, librarians and archivists have the opportunity to provide a level of filtration to the vast array of online genealogical information. This would not remove the user’s responsibility of determining suitability, but records obtained from a library-provided resource would carry a higher level of trust than information pulled from the unfiltered Internet.

Additional Ways to Document Authenticity

The following recommendations are additional ideas for improving the user experience and were drawn from the findings. Supplementing compiled indices with digital surrogates is a
way to enrich existing files, both online and off. For example, a repository that holds print indices for county records could work with county offices to scan the original documents. Collaboration with local offices or agencies would benefit both parties and would make resources more widely available to researchers. To achieve this, it is recommended that LIS professionals engage the help of genealogical societies as well as members of the public. Soliciting volunteers for such a project would increase community awareness of the collection in question and would attract users of similar items as well. Much like literacy campaigns and other library-driven volunteer efforts, scanning original records is a feasible approach.

Online and Offline Access

Library-related usage patterns emerge in an examination of participants’ utilization of institutional subscriptions to online genealogical resources such as Ancestry Library Edition. The majority of participants across all adopter categories use free access to this type of resource provided by a library. In addition to their use of online resources, participants’ estimations of the frequency with which they would genealogical research if they did not have Internet access to resources suggest that libraries and archives should continue to maintain offline materials.

Study participants who indicated low confidence in the accuracy of materials obtained online were likely to have high confidence in the accuracy of materials obtained offline: 242 participants indicated the least confidence in the accuracy of resources obtained online, and 143 (59.1 percent) of these also indicated high confidence in the accuracy of materials obtained offline. Of the 242 participants who gave a low confidence rating for accuracy of online
resources, 197 (81.4 percent) gave a high (5 to 7) rating for the usefulness of the Internet in genealogical research.4

There appears to be a discrepancy between these two indicators. How could respondents who declared low confidence in the accuracy of materials retrieved via the Internet simultaneously indicate high usefulness of the Internet as a research tool? A subset of participants also submitted comments regarding the usefulness of the Internet, which help develop an interpretation of the data. Most of the case study’s participants recognize the distinction between the Internet as a conduit for information exchange and the Internet as a source of information. In addition to comments that delineate distinctions between types of records, comments refer to the Internet’s usefulness as a tool, a source of clues, or a means of connecting with other researchers. The LIS profession has an opportunity within the genealogy CoP; although many of these users are savvy information seekers, some need the guidance of an information professional to discern good information sources from those that may be questionable.

Roles of and Relationships with Other Genealogists

Genealogists’ attitudes toward one another reflect complex relationships among members of this CoP. Respondents provided an array of names -- cousin, friend, kindred spirit -- to describe how they relate to other genealogists, and they mentioned both encountering other genealogists who were unwilling to share information and a reluctance to share their own findings.

4 The majority of participants who rated their confidence in the accuracy of online materials lowest rated confidence in accuracy of offline material as 6.
Relationships and roles are fluid constructs that depend on participants’ attitudes, experiences, and expectations. In this study, users’ attitudes toward communication and collaboration within the CoP were assessed via questions regarding the roles they consider other genealogists to play in their research. Participants selected all that apply from a list including collaborator, colleague, competitor, and other (Q45). The question included encouragement for respondents to explain or give examples if they selected “other.”

One respondent who selected “collaborator” commented, “We all feel that each one of us has something to contribute to the whole” (Participant 0327). Another said, “My cousin and I are in this together” (Participant 0668). Other comments accompanying “collaborator” include this note regarding technique: “Sharing research with other experienced genealogists keeps you on the straight and narrow -- having to justify your findings to someone else means you examine it much more critically than perhaps you would otherwise” (Participant 0617).

Individual respondents’ perception of other genealogists as competitors was explained and clarified through comments such as this one, from a participant who selected both “collaborator” and “competitor”: “Most relationships are collaborative, but there are those [people] who are amassing numbers, not facts, or those who don’t like to be corrected. Those are competitive relationships” (Participant 0386).

Although the survey did not ask participants to compare the labels they would have used prior to Internet adoption, it is apparent that collaboration and collegial relations are occurring almost across the board. Internet-facilitated communication supports these relationships, according to participant comments; the Internet encourages closer working relationships between genealogists, either collaboratively or, as the survey shows, competitively. All relationships between genealogists who have adopted the Internet are impacted by the use of the innovation.
LIS professionals should be aware of the varying degrees of connectedness that may be found among genealogists. Although most of these researchers work alone, most also maintain some type of relationship with other genealogists.

Increased Frequency of Research Activity

The study found that genealogists conduct research more frequently post–Internet adoption than they did pre–Internet adoption. Only a small fraction of participants indicated daily genealogical research prior to Internet adoption. In 2011, almost half of the study’s participants indicated daily research. Fewer than one-quarter of respondents reported researching at least as frequently as three days per week before they began using the Internet; almost three-quarters report conducting online research at least as frequently as three days per week, with more than half of those indicating daily research. The rate of conducting offline research at least three days per week stayed essentially the same.

The majority of participants engage in genealogical research at least once per week, regardless of age or adopter level. Genealogists, therefore, are an active CoP. With a high percentage of members engaged in research activities on a weekly basis, this CoP uses both online and offline resources regularly. Thus genealogists comprise not only frequent researchers but also savvy, experienced researchers. LIS professionals should recognize that these users are both connoisseurs of resources and resources themselves; the CoP’s shared knowledgebase could be an asset to libraries and archives. Allowing users to contribute comments and corrections to
items within the collection and soliciting input from users regarding collection management⁵ are examples of ways LIS professionals could benefit from the assistance of this user group.

User Instruction

Experience with offline material improves experience online. “I feel fortunate that I knew how to conduct onsite research before the Internet” (Participant 0087). “Thankful I had a solid base understanding of offline research techniques for nearly two decades before I started doing my research online. It helps in understanding how to search online” (Participant 0397). These comments reflect a broad sense of appreciation for the “old way” of conducting research. Because some genealogists have only conducted research online, they may not know how research was conducted in the pre-Internet past, when electronic searches and “find on page” scans were not part of an information-seeker’s routine.

LIS professionals must be mindful that not all of these patrons are familiar with the basic skills required for searching offline resources. This lack of knowledge is relevant to both online and offline research; knowing how to use offline materials allows users to apply the appropriate skepticism to material retrieved at the click of a button, and it also allows them to find what they need when handed a book or folder of documents. For patrons who have never conducted research manually, that folder or unindexed volume might be seemingly impossible to use. User instruction would alleviate this unease.

Ideally, user instruction incorporates research skills and tools with best practices. Study participants indicate through comments that they understand their own responsibility for being a

⁵ These are not revolutionary suggestions. The literature contains anecdotes describing genealogical societies’ involvement with public libraries, for example, but given that this study collected anecdotes of negative interactions between LIS professionals and genealogists, a message encouraging collaboration bears repeating.
good patron; “In general [staff in archives] are very helpful particularly if you have taken the
trouble to email ahead with your queries” (Participant 0616). Not all users appreciate how their
behaviors, such as calling or emailing before visiting, can positively impact the reference
encounter.

Summary

The findings that address the two primary research questions guiding this study yield
useful information for LIS professionals to consider. The Internet impacts the practice of
genealogical research (RQ1) by allowing users to conduct research more frequently than they did
prior to Internet adoption. The majority conduct online genealogical research several times per
week, although they have not abandoned offline research. Internet adoption has increased the
frequency with which genealogists communicate with one another as well (RQ2). Study
participants indicate an increased likelihood of working together since adopting the Internet; this
collegial ethos may extend to working with libraries and archives as well.

Although the study found that some genealogists only conduct research online, most
participants in this case study recognize the need to include both online and offline information
and access methods into their genealogical research. Concerns about the accuracy of online
material surfaced throughout the survey and constitute an area in which LIS professionals have
both the knowledge and the opportunity to improve service to this user group.

Implications for LIS Educators

These findings impact LIS education as well. Future LIS professionals should understand
an overview of the historical relationship between genealogists and librarians and archivists. The
next generation of librarians and archivists have the opportunity to learn from the past and improve the future of LIS-genealogist relations. LIS curricula should include genealogists as a user group librarians and archivists will encounter, both in their repositories and online. Continuing education opportunities for improving service to genealogists are also discussed.

Historical Unease Between Genealogists and LIS Professionals

“In the past, librarians have had an intense dislike for genealogists. I learned early on to avoid saying I was a genealogist unless I had to. Now it isn't so bad, but my habits are ingrained. I try to avoid library staff unless I need to ask questions that I haven't been able to answer by browsing or asking another genealogy patron” (Participant 0732).

“I introduce myself as a history scholar not a genealogist, but archivists are coming around to being user-friendly to genealogists” (Participant 0874).

Students who are working toward careers in libraries, archives, and online information provision need to know that there is a history of discontent between LIS professionals and genealogists. CoPs, by nature of their shared practice area, tend to have specialized knowledge, often about very specific individuals or locations. Genealogists may feel inclined to over-explain their information needs to LIS professionals, since they usually know more about their area(s) of interest than the librarian. LIS professionals, in turn, may be tempted to dread encounters with genealogical researchers. Participants revealed anecdotes about unpleasant encounters, hurt feelings, and discourteous service. Not revealed in the study data, but nonetheless present in the historical relationship, is the perspective of the non-genealogist LIS professional.6

6 Because the participants in this case study were all users of Ancestry.com, there were no non-genealogist LIS professionals surveyed.
Potential LIS Curriculum Development

LIS curricula include courses tailored to specific user groups. These groups tend to be defined by age (e.g., young adults), ethnicity (e.g., Latino), or ability (e.g., visually impaired). Genealogists do not fit easily into these classifications, as they span various categories of users.

This CoP varies by age, race, education, experience, and skill, and their information needs vary accordingly. LIS educators should recognize that genealogists and other specific knowledge-based user groups such as stamp collectors or historical reenactors are not an easily generalized group. CoPs are analogous to professions; broadly painted, this CoP comprises both professional and amateur genealogists, but their shared practice is akin to a profession. Their knowledge, interest, and passion for their subject is personal, so they differ from professional or occupational CoPs.

LIS graduate programs generally offer courses on service to professional groups. Medical and law librarianship courses prepare students for work in specialized libraries. Courses that teach reference, both general and specific to sciences, humanities, or other academic areas, also offer an approach that may work with teaching service to genealogists. The thematic underpinning of all of these types of courses, however, is often lost on students deciding which courses to take: service to specific groups. What do these users want? What assistance, if any, do they need? How can future LIS professionals prepare to serve them best?

What do they want? This study suggests that genealogists want to be understood, and they want to be appreciated -- they want to be heard. Comments submitted by participants who had completed the survey expressed gratitude for having the opportunity to express their views.

7 Non-professional researchers such as amateur genealogists are often referred to as hobbyists in the literature.
Comments describing past experience with LIS professionals reflect having felt unappreciated, misunderstood, and unheard.

What do they need? Members of this CoP have varying needs for research assistance, but all genealogists need access to information. Assuring that accurate resources are accessible, and assistance available if requested, are paramount. Just as LIS professionals in the field would benefit from soliciting input from this CoP in order to provide these users with improved service, so would students planning to enter the field. Input from genealogists would enrich the classroom experience and allow LIS students an opportunity to interact directly with users’ needs.

How can future LIS professionals prepare to serve them best? Future professionals need to learn how to listen to their users and to remain focused on that user. Patrons should never have to describe research encounters the way this study participant did: “Staff helpfulness varies a lot depending on how many ‘idiots’ they have dealt with that day” (Participant 0616).

Continuing Education

LIS professionals benefit from continuing education initiatives in many topic areas, and service to genealogists is no exception. LIS educators could better provide services to this community of users by sharing their curricular resources with libraries and archives and with associated professional organizations as well. As the practice of genealogy evolves, so must the people involved with the practice -- not only the genealogists themselves but also the community of LIS professionals who serve their information needs. The LIS profession has an opportunity to guide the evolution of this CoP’s research activities, through partnerships with both genealogists and resource developers.
Summary

This study found that Internet adoption has increased many genealogists’ self-sufficiency as information seekers (RQ1) while linking them to other members of their CoP (RQ2). The next generation of librarians -- today’s LIS students -- should consider the somewhat paradoxical role played by technology. This broad overview of implications for LIS educators involves providing opportunities for future practitioners to develop an understanding of genealogists as a CoP and as an LIS user group. LIS education imparts the ethos of the profession as well as foundational professional skills; service to all is part of the mission of the field. This study demonstrated some of the attitudes genealogists have perceived from past experiences with staff members in libraries and archives, as well as some of the attitudes held by the genealogists themselves. Current and future LIS professionals will benefit from education that helps craft a mutual understanding of the nuances of this relationship.

Implications for Online Genealogy Resource Developers

This study revealed opportunities for improving the user interface and the underlying functionality of online genealogical resources. As noted above, study participants generally feel less confident in the accuracy of materials obtained online than those obtained offline. Also noted are the varying levels of experience and education among genealogists, each of which leads to a different way to consider the survey data and identify implications for developers.
Resource Authority

In a library or archives, a patron has access to information that has been vetted, at least to some extent. Most of these materials have been acquired and retained on the basis of formal collection development policies and an intent to collect and provide materials in certain defined areas. On the Internet, researchers are responsible for determining the trustworthiness of materials located through searches. Online resources provide a means of acquiring information to anyone with who can use a computer and has access to the Internet. This is one of the Internet’s great benefits, but for a CoP that is building a shared knowledgebase, it provides an element of uncertainty: the tool’s ease of use puts it in the hands of inexperienced users as well as experienced information seekers. More experienced online researchers are more able to assess the validity of a source: What is the URL? Was it accessed via the “invisible library” of vetted resources provided by a repository? An inexperienced researcher who encounters another inexperienced researcher’s information published online may fall into the trap of accepting “garbage in, gospel out” (Participant 0666) without checking the source. Because anyone can publish their research online, an inexperienced user may not recognize so-called garbage. As one participant commented, as a genealogical resource, the Internet “is only as accurate as the researcher is skilled at separating the wheat from the chaff” (Participant 0429).

Genealogy resource developers could alleviate experience concerns by building safeguards into their products. When a hypothetical user performs a search on an online genealogy resource, the search engine may return thousands of related results. An inexperienced searcher may not be able to assess the relative merits of different types of result -- for example, a digitized death certificate versus an indexed voter list. A pop-up window with a link to assistance

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8 Anyone can publish their research in print as well, but repositories generally do not provide access to information known to be erroneous. Online information may not be vetted as carefully, if at all.
might be useful to provide linked resources to the searcher. Access to an experienced mentor might not be literally possible at that moment, but an electronic intermediary could provide a personalized FAQ for the searcher, proactively addressing information needs of which the searcher may not even be aware. For example, a series of canned responses crafted by LIS professionals would serve as a surrogate for an actual advisor.

Option for Reference Assistance

Another safeguard that could improve user confidence in the accuracy of the materials retrieved is the provision of access to human assistance. Many libraries offer virtual reference service to patrons, and a direct link between the genealogical research product’s interface and a reference professional would alleviate potential concern about a finding’s trustworthiness or relevance to the specific line of inquiry. A clearly visible link to assistance -- such as FAQs or a way to contact a virtual librarian -- at every step of the search process would increase user confidence. The availability of an information professional to assist users with their online searches could also prepare the user for a more positive experience in working with librarians in offline research in the future.

Distinctions Between Record Types

This study found that many genealogists who have adopted the Internet as a research tool are relatively inexperienced information seekers; many of them did not conduct pre-Internet genealogical research. Online resource developers must recognize that experienced researchers distinguish the relative validity of source documents while those with less experience may be more inclined to trust whatever they find.
Online resources should provide tutorials for using different types of records. Ancestry.com, for example, provides blank copies of early census forms to help users “translate” the handwritten columns of numbers; samples of period handwriting are also provided to help with the document “translation” that 21st-century users may struggle with. Provision of explanations of document types is key to streamlining the user experience and contributing to a more efficient and accurate search.

User-Contributed Content

Several participants took issue with online family trees, which often do not include source information or the source given is another family tree: “Those green leaves [signals that related sources have been electronically located] at Ancestry have made some family trees fuller, but not quite true with correct ancestors. .... This has led to diseased trees being unreliable. Most do not give a source for their findings, other than found on another family tree" (Participant 0031).

Letting users indicate tentativeness to linked or submitted data would ease some of the concern genealogists have for releasing and accessing family trees online. Just as genealogists are able to contribute comments and corrections to offline resources housed in local public libraries, so too can they contribute clarification to online resources. A wiki or social media interface would capture user comments; Ancestry.com allows users to provide alternate names for entries in the U.S. Census, for example. These appear as annotations and are checked for appropriateness before being published on the site. Once approved, these user-submitted names are returned in search results, which allows a knowledgeable user to correct an omission, misspelling, or other mistake so that future searchers will not be hampered by the error.
Institutional Subscriptions

Several online genealogical resources offer libraries and archives the opportunity to provide patrons access via institutional subscriptions to services such as HeritageQuest and Ancestry Library Edition. Patrons are able to use the institution’s subscription in lieu of a personal subscription, and some do so as a trial before committing to purchasing a personal subscription.

Only a small percentage of this study’s total participants currently utilize an institutional subscription to an online genealogical resource. However, when sorted by adopter level, an interesting trend emerges: A greater proportion of earlier adopters use institutional access than do later adopters, including laggards. Possible explanations for this observed trend in research behavior include the fact that early adopters have more experience with all types of resources and are therefore more comfortable using offline resources. Also, as many participants noted, the availability of online resources has improved over time, so early adopters simply did not have access to as many resources online as later adopters did and thus would have needed to use library and archival resources. Or perhaps in the early years of Internet adoption users may not have had reliable access at home and thus used both offline and online resources at a library or archives.

Summary

This study revealed genealogists have an increased sense of usefulness and ease of use for Internet resources compared with the usefulness and ease of use of libraries and archives for genealogical research (RQ1). Study participants’ ratings of usefulness and ease are arguably
hinged on Internet resources’ interface design. Participants gave lower ratings for confidence in accuracy to Internet resources, however. Content developers have the opportunity to enhance the user experience by providing additional information to genealogists who use their products; such additional access to information ranges from FAQs to virtual reference. Provision of this type of instructional information helps create more informed users for the product itself.

Genealogists communicate with one another more now than they did before adoption of the Internet (RQ2). Online genealogical resources such as Ancestry.com offer users the opportunity to communicate with others through the site’s messaging system. Sites that do not allow researchers to connect with others should consider implementing mechanisms for online communication.

Providing repositories with institutional access to genealogical sources, which are then passed on to their patrons, allows genealogists to use these sources. This widens the audience of users from those who can afford a somewhat expensive subscription to anyone who has access to a member library or archives. Resource developers benefit from this expanded base of users, as it increases the number of potential subscribers.

Conclusions

The significance of Internet adoption in genealogists’ research and communication is undeniable. Online access to materials and to other genealogists has made genealogical research easier and faster; some participants indicated that without the Internet, they would not be doing genealogical research at all.

However, the majority of participants anticipated they would continue to conduct genealogical research, despite indicating less-frequent offline genealogical research activity in
2011 than before Internet adoption. One-quarter of the study’s participants estimated that they would engage in genealogical research at least once per week if they did not have online access to genealogical resources.

These rates, considered in light of the comments made by study participants, indicate that Internet adoption has not replaced the “old” way of accessing information; offline research patterns mirror the rate of research conducted prior to Internet adoption. The comments collected in this study reflect a variety of positive and negative experiences with online resources, repository staff, and other genealogists. The overwhelmingly positive qualitative responses captured with this survey indicate this population was pleased to be studied. Some participants even suggested future research avenues to pursue.\(^9\)

**Fit of Theory to Investigation**

DoI theory guided explanation of the phenomenon of the impact of Internet adoption on the practice of genealogy. Although the concept of observability was not explicitly evident among participants’ adoption behaviors, the other components of the DoI theory (relative advantage, compatibility, complexity, and trialability) fit the study well. The rate of adoption within this case study maps to Rogers’s bell curve, with the first two categories considered together\(^10\) (Appendix G, Figure A3).

As Rogers notes, the rate of adoption of an innovation is the easiest aspect of DoI theory to observe (Rogers 2003, 268); the adoption of the Internet may be documented by time-stamped messages or printouts, for example, or by the individual’s recollection. This study investigates a

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\(^9\) Although some cross-postings of the survey invitation on message boards were accompanied by an “oh-no-another-survey” comment, the comments provided in the actual survey and were very positive and appreciative.

\(^10\) The options for dates for initial Internet usage were problematic due to the open-ended starting range provided (“before 1994”); thus no distinction can be made between innovators and early adopters.
single case of Internet users; an investigation of the diffusion of Internet adoption among additional Internet users, either another set of genealogists or a different CoP, would further clarify the diffusion patterns observed here. For example, tracing diffusion across multiple sets of users would provide an additional illustration of adoption decision-making behaviors. Additional testing would not only correlate to the findings in this study, it would also strengthen the validity of DoI theory itself. This study did not find observability to be a necessary element for consideration when using the DoI lens. Other applications may confirm the necessity of maintaining this theoretical component.

Changes to the Survey Instrument

As mentioned above, the open-ended date ranges were problematic for interpreting the survey results. This occurred in questions relating to initial genealogical research, both offline (Q2; Appendix D, Survey Instrument) and online (Q3), and age (Q70). These “before [year]” starting points would be replaced with actual years. Conversely, questions relating to years of events (Q44) would be replaced with year ranges rather than specific years; numerous participants commented that they did not recall exact dates.

Response options across similar question types would be replaced using the same language across the questions. Q69, for example, provided slightly different response options from the responses presented with Q30 and Q31. These minor adjustments would tighten the fit of the instrument to the task.
Future Research

This study opens lines of inquiry for future research. The finding that the Internet encourages relationships between genealogists, both collaborative and competitive, warrants additional investigation. Following Fulton (2009a), the positive or negative affect of Internet-enabled relationships should be addressed. Additionally, maintaining the DoI lens while investigating levels of sharing would allow an understanding of how collaboration occurs among the different stages of adoption; this study indicated that laggards are less likely than early adopters to use library-provided online genealogy resources. Are there similar distinctions among information-sharing behaviors between groups?

The View from Across the Desk

A similar survey of LIS professionals and their attitude toward family history researchers would present the “other side” of this story, to an extent. The relationships between users and providers are rocky at times, and the LIS professional’s opinion should be considered as well. Modifying the survey instrument used in this study and administering it to another group of genealogists plus a cohort of LIS professionals would help craft a multi-faceted image of the relationships between these groups.

Community and Participation

This study observed Ancestry.com users through the lens of DoI theory. Additional data were collected that sheds light beyond the participants’ Internet adoption behaviors. Level of participation in online and offline genealogy groups and sense of community were also measured through the survey. Relationships between participation in communicative activities and sense of
community are ripe for investigation, either with the present data or with a new cohort of

genealogists. The findings of this study provide a starting point for such research; Internet
adoption undoubtedly plays a role in both participation and community.

Validity

One of Fulton’s study participants, in discussing the social and communicative benefits
of the Internet, mentions her online work being “not actual research” (Fulton 2009b, 762). What,
then, is “actual” genealogical research in the age of the Internet? Some of this study’s
participants indicate that research conducted online is less valid than that conducted offline,
although the primary difference is simply the medium with which information is obtained. This
notion would provide additional insight with further investigation.

Conclusion

There are additional lines of inquiry emanating from this study. Further research should
be aimed at completing this sketch of this CoP. With the documented popularity of family
history research on the rise, this is a user group that will continue to rely on LIS resources for the
foreseeable future, whether offline, online, or both. Ongoing additional study is required to
provide the highest level of service to this user group.
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APPENDIX A: IRB Certification

Before any data collection commenced, the research proposal was submitted to the University of Alabama’s Institutional Review Board. The application, Protocol ID 1996, was accepted on February 16, 2011, for an expedited review of a non-medical study involving human subjects. Clarifications were requested on February 17, 2011, and the revised application was resubmitted on February 21, 2011. Approval was granted on February 25, 2011.
March 1, 2011

Jennifer Land, MLIS
College of Communication & Information Sciences
School of Library & Information Studies
The University of Alabama

Re: IRB # 11-OR-063 “Gravestones to Google: Information-Seeking Behavior and Satisfaction in the Evolving Field of Family History Research”

Dear Ms. Land:

The University of Alabama Institutional Review Board has granted approval for your proposed research.

Your application has been given expedited approval according to 45 CFR part 46. You have also been granted the requested waiver of written documentation of informed consent. Approval has been given under expedited review category 7 as outlined below:

(7) Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.

Your application will expire on February 29, 2012. If your research will continue beyond this date, complete the relevant portions of Continuing Review and Closure Form. If you wish to modify the application, complete the Modification of an Approved Protocol Form. When the study closes, complete the appropriate portions of FORM: Continuing Review and Closure.

Should you need to submit any further correspondence regarding this proposal, please include the above application number.

Good luck with your research.

Sincerely,

Carpantato T. Myles, MSM, CIM
Director & Research Compliance Officer
Office for Research Compliance
The University of Alabama
APPENDIX B: Invitation to Participate

Subject: genealogy PhD dissertation -- invitation to participate!

My name is Jennifer Land, and I am both a genealogist and a PhD candidate. I am bringing those two together in a dissertation called “From Gravestones to Google: Information-Seeking Behavior and Satisfaction in the Evolving Field of Family History Research.” I’m surveying my fellow genealogists to find out how access to resources on the Internet impacts the way we conduct family history research.

I’ve created a web survey that will take about 10-15 minutes. This survey contains questions about your experience conducting genealogical research, the types of research tools you use, and your experience working with other genealogists. If you are willing to share some information with me, please click here (https://www.surveymonkey.com/s/jland).

Jennifer

Jennifer Mathews Land, MLIS
PhD candidate, The University of Alabama
College of Communication and Information Sciences
jland.dissertation@gmail.com
https://www.surveymonkey.com/s/jland
APPENDIX C: Closing Page of Survey

Thank you very much for participating. Your responses will help us understand how access to resources on the Internet impacts the way genealogists conduct research.

If you would be interested in reading about the results of this study, or if you would like to provide further information about your experiences as a researcher, please provide your email address. (Your responses to this survey will not be linked to your contact information.)

If you would like to invite any of your fellow online genealogists to participate in this study, please send them this link: https://www.surveymonkey.com/s/jland. The findings from this study will help librarians and archivists provide materials and resources to better serve family history researchers.

If you would like to contact the researcher directly, please send an email to jland.dissertation@gmail.com.
APPENDIX D: Survey Instrument
From Gravestones to Google

Research Invitation

Jennifer Mathews Land, Principal Investigator from the University of Alabama, is conducting a study called “From Gravestones to Google: Information-Seeking Behavior and Satisfaction in the Evolving Field of Family History Research.” She wishes to find out how access to resources on the Internet impacts the way genealogists conduct family history research.

Taking part in this study involves completing a web survey that will take about 10-15 minutes. This survey contains questions about your experience conducting genealogical research, the types of research tools you use, and your experience working with other genealogists.

We will protect your confidentiality by assigning a number to your responses and not using any identifying information. Only the investigator will have access to the data. The data will be password protected. Only summarized data will be presented at meetings or in publications.

There will be no direct benefits to you. The findings will be useful to librarians and archivists for providing materials and resources to better serve family history researchers.

The chief risk is that some of the questions may make you uncomfortable. You may skip any questions you do not want to answer.

If you have questions about this study, please contact Jennifer Land at (205) 454-7008 or by email at jkmland@gmail.com. If you have questions about your rights as a research participant you may contact Ms. Tanta Myles, The University of Alabama Research Compliance Officer, at 205-348-8461 or toll-free at 1-877-820-3066.

YOUR PARTICIPATION IS COMPLETELY VOLUNTARY. You are free not to participate or stop participating any time before you submit your answers.

If you understand the statements above, are at least 19 years old, and freely consent to be in this study, select I AGREE and click NEXT to begin.

☐ I AGREE
1 When did you begin researching your family history?

2 When did you start using the Internet for family history research?

3 How useful is the Internet in your family history research?

1 = less useful
7 = more useful

Comments:
4 **Do you subscribe to any paid genealogical research sites? Select all that apply.**

- [ ] Ancestry.com
- [ ] Genealogybank
- [ ] HeritageQuest
- [ ] None
- [ ] Other (please specify)

5 **In the past, have you subscribed to any paid genealogical research sites to which you no longer subscribe?**

- [ ] Yes
- [ ] No

If yes, please share your reason(s) for discontinuing subscription:

6 **Do you use any genealogical research sites provided to you at no cost by a library or archives?**

- [ ] Yes
- [ ] No

Comments:

7 **Do you participate in online genealogy message boards?**

- [ ] Yes, I post and respond to queries/information
- [ ] Yes, but I only read (I do not post or respond)
- [ ] No
8. How satisfied are you with your involvement in genealogy message boards?
   1  2  3  4  5  6  7

1 = not satisfied
7 = very satisfied

9. Do you consider this to be a community to which you belong?
   Yes  No

Comments:
1.0 **Do you participate in genealogy email list groups?**

- [ ] Yes, I post and respond to queries/information
- [ ] Yes, but I only read (I do not post or respond)
- [ ] No
11 How satisfied are you with your involvement in genealogy email list groups?

1 = not satisfied
7 = very satisfied

12 Do you consider this to be a community to which you belong?

☐ Yes
☐ No
13 Do you participate in any non-genealogy social networking sites, such as MySpace, Facebook, or Twitter?

- Yes
- No
14 **Have you ever used a non-genealogy social networking site for genealogical research or communication?**

○ Yes
○ No

Comments:

15 **Do you consider social networking sites to be communities to which you belong?**

○ Yes
○ No

Comments:
16 Do you participate in online message boards relating to topics other than genealogy?
   ○ Yes (either posting or reading)
   ○ No

17 Do you participate in email list groups relating to topics other than genealogy?
   ○ Yes (either posting or reading)
   ○ No
18 Many public libraries have local history and genealogical resources. Some academic libraries and dedicated genealogical libraries, such as LDS Family History Centers, also host family history collections. How useful to your family history research are the resources found in libraries?

Comments:

1 = less useful
7 = more useful
N/A = do not use

19 How helpful are the staff members you have encountered in libraries?

Comments:

1 = less helpful
7 = more helpful
N/A = do not use

20 Archives contain primary sources, such as letters, diaries, and financial records. How useful to your family history research are the resources found in archives?

Comments:

1 = less useful
7 = more useful
N/A = do not use

21 How helpful are the staff members you have encountered in archives?

Comments:
From Gravestones to Google

1 = less helpful
7 = more helpful
N/A = do not use

2.2 Other than the Internet, libraries, and archives, do you use any other research sources in your family history research?

☐ Yes
☐ No
22a Please describe the other sources you use in your family history research.
From Gravestones to Google

Please indicate how easy to use you find the following means of acquiring genealogical information:

1 = not easy
7 = very easy
N/A = do not use

23 Internet research
   - 1
   - 2
   - 3
   - 4
   - 5
   - 6
   - 7
   - N/A

24 Library research
   - 1
   - 2
   - 3
   - 4
   - 5
   - 6
   - 7
   - N/A

25 Archival research
   - 1
   - 2
   - 3
   - 4
   - 5
   - 6
   - 7
   - N/A

26 Other research sources
   - 1
   - 2
   - 3
   - 4
   - 5
   - 6
   - 7
   - N/A
Are you a member of an offline genealogy research group?

- Yes
- No
28 How satisfied are you with your involvement in your offline genealogy research group?

- 1 = not satisfied
- 7 = very satisfied

29 Do you consider this to be a community to which you belong?

- Yes
- No

Comments:
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<thead>
<tr>
<th></th>
<th>Question</th>
<th>Options</th>
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<tbody>
<tr>
<td>30</td>
<td><strong>How often do you conduct family history research ONLINE?</strong></td>
<td>- Every day</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Three or more days per week</td>
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<td>- Once or twice per week</td>
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<td>- Once or twice per month</td>
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<td></td>
<td>- A couple of times a year</td>
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<tr>
<td>31</td>
<td><strong>How often do you conduct family history research OFFLINE?</strong></td>
<td>- Every day</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Three or more days per week</td>
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<tr>
<td></td>
<td></td>
<td>- A couple of times a year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- I do not conduct research offline.</td>
</tr>
</tbody>
</table>
32 How did you obtain genealogical information BEFORE you began using the Internet for family history research? Check all that apply:

- [ ] I did not conduct family history research before the Internet.
- [ ] Cemetery office records
- [ ] Cemetery transcriptions
- [ ] Census records
- [ ] Church records
- [ ] City directories
- [ ] Court proceedings
- [ ] Family trees/genealogies (published)
- [ ] Immigration documentation (e.g., naturalization proceedings, passport applications, ships' passenger lists)
- [ ] Land records
- [ ] Military records
- [ ] Newspaper articles
- [ ] Obituaries
- [ ] Stories (oral history) obtained by you
- [ ] Stories (oral history) obtained by others
- [ ] Other. Please list additional sources here, separated by commas.


From Gravestones to Google

33 **How often did you conduct family history research BEFORE you began using the Internet for genealogy?**

- Every day.
- Three or more days per week.
- Once or twice per week.
- Once or twice per month.
- A couple of times a year.

34 **Had you been asked, would you have been willing to share information you found BEFORE you began using the Internet as a genealogical reference tool?**

- Yes
- No [Please list the reason(s) you would not have shared your findings.]

35 **How did you communicate with other family history researchers BEFORE you started using the Internet in your research? Check all that apply:**

- Mail
- Telephone
- In person (one on one)
- Attend meetings/courses/sessions
- I did not communicate with other genealogists before the Internet.
- Other (please specify)
From Gravestones to Google

36 On average, how often did you receive information from another family history researcher BEFORE you began using the Internet in genealogical research?

- More than once per week
- Once per week
- Once per month
- A few times per year
- Once per year
- Less than once per year
- I did not communicate with other genealogists before the Internet.

37 On average, how often did you provide information to another family history researcher BEFORE you began using the Internet in genealogical research?

- More than once per week
- Once per week
- Once per month
- A few times per year
- Once per year
- Less than once per year
- I did not communicate with other genealogists before the Internet.
38 How do you communicate with other researchers? Check all that apply:

- Email
- Blog postings
- Message board postings
- Mail
- Telephone
- In person (one on one)
- Attend meetings/courses/sessions
- I do not communicate with other researchers.
- Other (please specify)

39 How often do you receive information from another researcher ONLINE, on average?

- More than once per week
- Once per week
- Once per month
- A few times per year
- Once per year
- Less than once per year
- I have never directly exchanged information with another online researcher.

40 How often do you provide information to another researcher ONLINE, on average?

- More than once per week
- Once per week
- Once per month
- A few times per year
- Once per year
- Less than once per year
- I have never directly exchanged information with another online researcher.
41  Since you began using the Internet for genealogical research, how often have you received information from another researcher OFFLINE, on average?

- More than once per week
- Once per week
- Once per month
- A few times per year
- Once per year
- Less than once per year
- I have never directly exchanged information with another online researcher.

42  Since you began using the Internet for genealogical research, how often have you provided information to another researcher OFFLINE, on average?

- More than once per week
- Once per week
- Once per month
- A few times per year
- Once per year
- Less than once per year
- I have never directly exchanged information with another online researcher.
Have you ever encountered another researcher who was unwilling to share information?

- Yes
- No
### Approximately when did you encounter a researcher who was unwilling to share information?

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<th>Year</th>
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<td>First occasion</td>
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<td>Most recent occasion</td>
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</table>

Please explain.
45. Which of these words could you use to describe your relationships with other family history researchers? Check all that apply:

- [ ] Collaborator
- [ ] Colleague
- [ ] Competitor
- [ ] I do not have relationships with other family history researchers.
- [ ] Other (please specify)

45 a. Please include any comments about your relationships with other genealogists:
In general, how confident are you in the accuracy of material you retrieve ONLINE?

Comments:

1 = not confident
7 = very confident

In general, how confident are you in the accuracy of material you retrieve OFFLINE?

Comments:

1 = not confident
7 = very confident
N/A = do not use
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<th>From Gravestones to Google</th>
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<tr>
<td></td>
<td>Please rank the following information sources in terms of the level of confidence you feel in the accuracy of their data. Consider actual or facsimile records, such as scanned images, not transcriptions (unless noted).</td>
</tr>
<tr>
<td></td>
<td>1 = not confident</td>
</tr>
<tr>
<td></td>
<td>7 = very confident</td>
</tr>
<tr>
<td></td>
<td>N/A = do not use</td>
</tr>
<tr>
<td>48</td>
<td>Cemetery office records</td>
</tr>
<tr>
<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
<tr>
<td>49</td>
<td>Cemetery transcriptions</td>
</tr>
<tr>
<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
<tr>
<td>50</td>
<td>Census records</td>
</tr>
<tr>
<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
<tr>
<td>51</td>
<td>Church records</td>
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<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
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<td>52</td>
<td>City directories</td>
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<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
<tr>
<td>53</td>
<td>Court proceedings</td>
</tr>
<tr>
<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
<tr>
<td>54</td>
<td>Family trees/genealogies (published)</td>
</tr>
<tr>
<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
<tr>
<td>55</td>
<td>Immigration documentation (e.g., naturalization proceedings, passport applications, ships’ passenger lists)</td>
</tr>
<tr>
<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
<tr>
<td>56</td>
<td>Land records</td>
</tr>
<tr>
<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
<tr>
<td>57</td>
<td>Military records</td>
</tr>
<tr>
<td></td>
<td>[ ] 1  [ ] 2  [ ] 3  [ ] 4  [ ] 5  [ ] 6  [ ] 7  [ ] N/A</td>
</tr>
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</table>
## From Gravestones to Google

<table>
<thead>
<tr>
<th>5.8</th>
<th><strong>Newspaper articles</strong></th>
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<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>5.9</th>
<th><strong>Obituaries</strong></th>
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</thead>
<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>6.0</th>
<th><strong>Stories (oral history) obtained by you</strong></th>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>6.1</th>
<th><strong>Stories (oral history) obtained by others</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>
6.2 Have you published any of your genealogical research online (e.g., a family tree on Ancestry.com)?
   - Yes
   - No
   Comments:

6.3 Other than material published online, have you ever published any of your genealogical research?
   - Yes
   - No

6.4 If you have published any of your genealogical research, where was it published? Check all that apply.
   - Newsletter
   - Magazine/journal
   - Book
   - I have not published any of my genealogical research offline.
   Comments:

6.5 Have you ever been paid for genealogical research?
   - Yes
   - No

6.6 Do you consider yourself to be a professional genealogist?
   - Yes
   - No
   Comments:
Have you ever paid another researcher for assistance with genealogical research?

- No
- Yes. Please explain the type of information you were seeking and/or received, and roughly when this transaction took place.
68 Do you use the Internet for activities other than genealogy?

- No
- Yes. Please list some of the other online activities you pursue, separated by commas.

69 If you did not have access to online resources, how frequently do you think you would conduct family history research?

- More than once per week
- Once per week
- Once per month
- A few times per year
- Once per year
- Less than once per year
- I would not be conducting family history research without the Internet.

Comments:
From Gravestones to Google

Demographic data

These last few questions will help us better understand and interpret your previous responses. No identifying information will be associated with your responses to these demographic questions.

70  **Year of birth**

71  **Gender**

- Female
- Male

72  **Race/ethnicity**

- Black/African/African-American
- White/European/Caucasian
- Hispanic/Latino
- Asian/Polynesian
- Native American
- Other (please specify)

73  **Education**

- Some high school
- High school diploma
- Some college (did not graduate)
- Associate’s degree
- Bachelor’s degree
- Master’s degree
- MD/JD/Other professional degree
- PhD
- Other (please specify)
**Geographic information**

<table>
<thead>
<tr>
<th>Location</th>
<th>United States</th>
<th>Canada</th>
<th>United Kingdom</th>
<th>Ireland</th>
<th>Australia</th>
</tr>
</thead>
</table>

Other country or province (please specify)

**Any final comments about your experience as a family history researcher, or about this survey...**
From Gravestones to Google

Thank you!

Thank you very much for participating. Your responses will help us understand how access to resources on the Internet impacts the way genealogists conduct research.

If you would be interested in reading about the results of this study, or if you would like to provide further information about your experiences as a researcher, please provide your email address. (Your responses to this survey will not be linked to your contact information.)

If you would like to invite any of your fellow online genealogists to participate in this study, please send them this link: https://www.surveymonkey.com/s/jland. The findings from this study will help librarians and archivists provide materials and resources to better serve family history researchers.

If you would like to contact the researcher directly, please send an email to jland.dissertation@gmail.com.
APPENDIX E: Informed Consent

Jennifer Mathews Land, Principal Investigator from the University of Alabama, is conducting a study called “From Gravestones to Google: Information-Seeking Behavior and Satisfaction in the Evolving Field of Family History Research.” She wishes to find out how access to resources on the Internet impacts the way genealogists conduct family history research.

Taking part in this study involves completing a web survey that will take about 5-10 minutes. This survey contains questions about your experience conducting genealogical research, the types of research tools you use, and your experience working with other genealogists.

We will protect your confidentiality by assigning a number to your responses and not using any identifying information. Only the investigator will have access to the data. The data will be password protected. Only summarized data will be presented at meetings or in publications.

There will be no direct benefits to you. The findings will be useful to librarians and archivists for providing materials and resources to better serve family history researchers.

The chief risk is that some of the questions may make you uncomfortable. You may skip any questions you do not want to answer.

If you have questions about this study, please contact Jennifer Land at (205) 454-7008 or by email at jkmland@gmail.com. If you have questions about your rights as a research participant you may contact Ms. Tanta Myles, The University of Alabama Research Compliance Officer, at 205-348-8461 or toll-free at 1-877-820-3066.

YOUR PARTICIPATION IS COMPLETELY VOLUNTARY. You are free not to participate or stop participating any time before you submit your answers.

If you understand the statements above, are at least 19 years old, and freely consent to be in this study, click on the I AGREE button to begin.
## APPENDIX F: Additional Tables

### Table A1. Genealogy lists, groups, and boards

<table>
<thead>
<tr>
<th>Name</th>
<th>Link sent to members?</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>About.com Genealogy forum</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>African-American: General board</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
</tr>
<tr>
<td>Allen County (Ind.) Public Library</td>
<td>Unknown</td>
<td></td>
</tr>
<tr>
<td>Association of Professional Genealogists</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Board for Certification of Genealogists</td>
<td>No</td>
<td>Restricted to certified genealogists</td>
</tr>
<tr>
<td>Brickwall·Genealogical Brickwalls</td>
<td>Unknown</td>
<td>Hosted on Yahoo! Groups</td>
</tr>
<tr>
<td>Conejo Valley (Calif.) Genealogical Society</td>
<td>Unknown</td>
<td></td>
</tr>
<tr>
<td>Capital PAF Users Group (CPAFUG)</td>
<td>Yes</td>
<td>Restricted to the members</td>
</tr>
<tr>
<td>Genealogy Bits and Pieces</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
</tr>
<tr>
<td>Genealogy Computing mailing list</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
</tr>
<tr>
<td>Genealogical Computing Society of Georgia</td>
<td>Unknown</td>
<td></td>
</tr>
<tr>
<td>Genealogy Data Backup board</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
</tr>
<tr>
<td>Genealogy message board</td>
<td>Yes</td>
<td>Hosted on Genealogy.com</td>
</tr>
<tr>
<td>Genealogy Research Club</td>
<td>Yes</td>
<td>Hosted on Yahoo! Groups</td>
</tr>
<tr>
<td>Genealogy Trails History Group</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Genealogychatfriends</td>
<td>Unknown</td>
<td>Hosted on Yahoo! Groups</td>
</tr>
<tr>
<td>General Genealogy Forum</td>
<td>Yes</td>
<td>Hosted on Genealogy.com</td>
</tr>
<tr>
<td>GEN-SITE-SWAP</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
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<tr>
<td>Helpful Tips Forum</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
</tr>
<tr>
<td>Homespun-L mailing list</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
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<tr>
<td>Lee County (Fla.) Genealogical Society</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Melungeon Forum</td>
<td>Unknown</td>
<td>Hosted on Genealogy.com</td>
</tr>
<tr>
<td>Metro NY Genealogy and Computers Group</td>
<td>Unknown</td>
<td></td>
</tr>
<tr>
<td>Olive Tree Genealogy</td>
<td>Unknown</td>
<td></td>
</tr>
<tr>
<td>People of Color - South*</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com.</td>
</tr>
<tr>
<td>Pieces of the Quilt</td>
<td>Unknown</td>
<td>Hosted on Yahoo! Groups</td>
</tr>
<tr>
<td>Research Resources: General board</td>
<td>Yes</td>
<td>Hosted on Genealogy.com</td>
</tr>
<tr>
<td>Roots-L</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
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<tr>
<td>Upcoming Genealogy Events Forum</td>
<td>Yes</td>
<td>Hosted on Genealogy.com</td>
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<tr>
<td>Volunteer Projects: General</td>
<td>Yes</td>
<td>Hosted on Rootsweb.com</td>
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*Email subject line amended to “genealogy PhD dissertation -- seeking diversity”*
Table A2. Non-genealogy sources

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<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Action</th>
<th>Date</th>
</tr>
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<tbody>
<tr>
<td>Facebook</td>
<td>Social networking utility</td>
<td>Status update</td>
<td>3/23/2011</td>
</tr>
<tr>
<td>Facebook</td>
<td>Social networking utility</td>
<td>Private message</td>
<td>3/26/2011</td>
</tr>
<tr>
<td>SLIS-L</td>
<td>University of Alabama School of Library and Information Studies list</td>
<td>Public message</td>
<td>3/28/2011</td>
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Table A3. Years of initial research

<table>
<thead>
<tr>
<th>All genealogical research</th>
<th>Online genealogical research</th>
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<tbody>
<tr>
<td>Before 1950*</td>
<td>Before 1994*</td>
</tr>
<tr>
<td>0.8%</td>
<td>19.2%</td>
</tr>
<tr>
<td>1.7%</td>
<td>44.1%</td>
</tr>
<tr>
<td>7.9%</td>
<td>35.2%</td>
</tr>
<tr>
<td>1970-1979</td>
<td>2010</td>
</tr>
<tr>
<td>20.5%</td>
<td>1.6%</td>
</tr>
<tr>
<td>1980-1989</td>
<td>2010</td>
</tr>
<tr>
<td>19.3%</td>
<td>1.6%</td>
</tr>
<tr>
<td>1990-1999</td>
<td>2010</td>
</tr>
<tr>
<td>28.0%</td>
<td></td>
</tr>
<tr>
<td>2000-2009</td>
<td></td>
</tr>
<tr>
<td>20.8%</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>1.0%</td>
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</tr>
</tbody>
</table>

*These headings were the earliest dates available on the Q1 and Q2 pulldown menus.
Table A4. Pre-Internet sources of information

<table>
<thead>
<tr>
<th>Source</th>
<th>Count</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Cemetery office records</td>
<td>392*</td>
<td>45.0%</td>
</tr>
<tr>
<td>Cemetery transcriptions</td>
<td>444</td>
<td>51.0%</td>
</tr>
<tr>
<td>Census records</td>
<td>508</td>
<td>58.3%</td>
</tr>
<tr>
<td>Church records</td>
<td>423</td>
<td>48.6%</td>
</tr>
<tr>
<td>City directories</td>
<td>420</td>
<td>48.2%</td>
</tr>
<tr>
<td>Court proceedings</td>
<td>301</td>
<td>34.6%</td>
</tr>
<tr>
<td>Family trees/genealogies (published)</td>
<td>447</td>
<td>51.3%</td>
</tr>
<tr>
<td>Immigration documentation</td>
<td>327</td>
<td>37.5%</td>
</tr>
<tr>
<td>Land records</td>
<td>367</td>
<td>42.1%</td>
</tr>
<tr>
<td>Military records</td>
<td>356</td>
<td>40.9%</td>
</tr>
<tr>
<td>Newspaper articles</td>
<td>488</td>
<td>56.0%</td>
</tr>
<tr>
<td>Obituaries</td>
<td>552</td>
<td>63.4%</td>
</tr>
<tr>
<td>Stories (oral history) obtained by others</td>
<td>419</td>
<td>48.1%</td>
</tr>
<tr>
<td>Stories (oral history) obtained by you</td>
<td>580</td>
<td>66.6%</td>
</tr>
<tr>
<td>Other</td>
<td>214</td>
<td>24.6%</td>
</tr>
<tr>
<td>I did not conduct family history research before the Internet</td>
<td>179</td>
<td>20.6%</td>
</tr>
</tbody>
</table>

* Total unique researchers: 871
APPENDIX G: Additional Figures

Figure A1. Pre-Internet use of multiple means to communicate with other researchers.

Figure A2. Pre-Internet research conducted at least once per week, by birth year.
Figure A3. Adoption of the Internet for genealogical research.