SOCIETY OF GENEALOGISTS
THE NATIONAL FAMILY HISTORY CENTRE

Result of Survey Regarding SoG Collections

A survey was carried out between in August/September 2019 to collect views from both members and non-members regarding the value they perceive of the various collections (books, manuscripts, microfilm/fiche, digital, etc.) held by the Society of Genealogists.

It was unfortunate that the survey did not ask whether the responder was a member of the Society of Genealogists or not as this would have provided additional useful insights.

The outcome and key learning from this survey is presented here.

Visits to library (Q1-3)

A review of how regularly respondents visit the library against their experience level and distance from the library was carried out. Less than 10% of any category only attend for lectures/courses (although this is at 10% for beginners). The further away someone lives, the less likely they will only attend for lectures/courses. The closer to the library (e.g. in central London, inside M25 or in Home Counties) someone lives the more likely they will visit at least 6 monthly. 68% of respondents who live in the rest of the UK only visit rarely or never. There were fewer differences between experience levels although advanced visit slightly more regularly than intermediate who visit slightly more regularly than beginners. 65% of overseas members visit when they are visiting the UK with only 20% never visiting.

Preparation for a visit to library (Q4)

70% of respondents use the SoG Online Catalogue to prepare for a visit; 56% prepare a research plan while 40% have an ongoing plan from a previous visit and 38% prepare a specific research question. About 20% also use the other catalogue listings (document collection surnames, pedigrees, birth briefs) or the FamilySearch catalog. This implies that most visitors are making some preparations for a visit however further aid could be provided regarding preparing to visit. Note that the 'Preparing for a visit' page on the SoG website only mentions the library catalogue.

Importance of Record Types (Q5)

417 people (73.7% of the total responses) answered this question.

These responses were analysed by the person's perceived level of expertise in genealogy (beginner/intermediate/advanced), place of residence (whether they lived in the Home Counties/within the M25 or those who lived elsewhere in the country/in another country) and frequency of visiting the SoG (weekly/monthly visits or more irregular visits). Respondents provided an importance ranking (1 not important to 5 very important) for eight specific record types. Looking at the percentages for those who rated each type of record:

- Manuscript Collections were much more important to the advanced genealogists (47% rated them at level 5 and 25% at level 4), compared to those who were beginners, with intermediate genealogists in between. The importance was not reflected by where the person lived or how often they visited.

- Pedigrees were also rated highly by advanced genealogists (51% ranked them as a level 4 or 5, compared to 27% of beginners and 34% of intermediates). They were also considered to be more important by those lived outside the Home Counties (44%) rather than those who lived closer to the SoG (37%). They were slightly more valued by those who regularly over those who visited irregularly.

- Census indexes were extremely important to beginners (59% ranked them at 4 or 5) whilst they were of little importance to advanced genealogist (16%). Intermediates were between those two groups (28%). How often the person visited or where they lived was of little relevance.

- Probate indexes were rated highly by all categories of responder with them being of greater value to beginners (63% scored them at 4 or 5) than the advanced user (45%). Place of residence or regularity of visit appeared to be of little importance.

- Maps were of lesser interest to all types of genealogist, being slightly more important to beginners (42%) compared to advanced users (29%).

- Family history books proved to be important to all types of user, the majority ranking them at level 4 or 5 of importance to their research, with about 40%-55% of all categories of user scoring them at that level.

- Historic periodicals were most highly rated by advanced researchers (48% at level 4 or 5) compared to beginners (25%) or intermediates (39%). Once again, place of residence and frequency of visit is of little importance.

- Heraldry/Royalty sources are of little perceived value in this survey with 80% of beginners ranking such sources at level 1 or 2, compared to 73% of intermediates and 61% of advanced users. The advanced readers were split about their importance with 23% rating them at level 4 and 5.

Regularity of access of specific records (Q6&7)

399 people (70.5% of the total responses) provided answers to this question. These responses were again analysed by the person's perceived level of expertise in genealogy, place of residence and frequency of visiting the SoG. Thirteen specific record sets were reviewed and the number of times the respondent had accessed the data at the SoG library in the past two years was provided.

- Parish register transcripts are used frequently (80%) by those who use the library regularly (at least monthly) and, as they are mostly not digitally available, almost never by those who visit irregularly. Similarly, they are hardly used by people who are from outside the Home Counties. They are a popular source of research information for intermediate and advanced genealogists, whilst half of beginners have almost never used them.

- County census indexes are very rarely used by about 70% of all three categories of genealogists, irrespective of where they live and how frequently they use the library.

- Monumental inscriptions transcriptions are infrequently used by beginners, those who live outside the Home Counties or who visit irregularly. However, at least 40% of those who live close to the SoG and who use the library often have used such collections on at least five visits in the last two years.

- Professions lists are a popular source for advanced researchers (although only 31% use them often) and for those who visit the library on a more regular basis (48% making use of them often). The figures suggest that they are not a frequent source of information for most other types of researcher.

- Profession histories and Apprenticeship records are rarely used by most visitors to the library. Most have never used them. They are only used irregularly by those who come to the library more often and by the more advanced readers.

- Both Family histories (self published) and Family histories (commercially published) are also used infrequently by most visitors to the library. Again the majority of readers have almost never used them. Unsurprisingly, they are a more popular source with those who visit often and more advanced readers. Self published histories appear to be of greater interest than those produced commercially.

- Probate indexes are used surprisingly little by those who completed the survey. Nearly 50% of both the intermediate and advanced groups had used such finding aids less than once in the last two years. They are most frequently used by those who visit regularly (45%) whether they come from near or further afield.

- Town, city and county directories are used more frequently, not surprisingly, by those who live closer to the Society (37%) and those who visit the library more often (55%).

- Books about places are used mainly by those who visit the library regularly, 56% having used such guides more than five times in the past two years.

- Text books are rarely used by those of all levels of expertise, with 70%-85% of readers referring to such works only once in the last two years. Frequent visitors make up the largest percentage of those who use reference works most often, 29% having used them on more than five occasions in two years.

- Periodicals are used mainly by frequent users, 48% reading them regularly.

The respondents were then asked to identify other record sets that they regularly accessed. The following responses were received (the number indicating the number of people who mentioned the record set):

- Parish registers/BTs 18
- Marriage licences 9
- Document Collection 9
- Special Collections 9
- State papers/taxation/courts 8
- LDS affiliate online 7
- LDS films 7
- Overseas/migration 7
- Wills/probate 5
- County historical/FHS 5
- Peerage/visitations/BRS 5
- Religions 4
- Schools/alumni 4
- Pedigrees 4
- Scottish/Irish 4
- Poll books 2
- County tracts 2
- Birth briefs 1

Filtering on level of expertise, intermediate and advanced users more or less equally accessed the widest range of sources. Beginners mostly mentioned basic sources and general/location books but several used probate.

Conclusion: Users consult a very wide range of sources, especially those who consider themselves intermediate or advanced.

Aids to help use SoG Collections (Q8)

391 answered this question.

Six options for aids that would help in the use of the Society of Genealogist collections were provided and the respondents were asked to tick all that apply. They were also given to provide other aids that would help them. The responses were:

- Over 80% of all respondents wanted an integrated catalogue (e.g. library catalogue, document collection, pedigrees, data online, special collections). There was not a significant difference based on experience or how often they visited the library.

- 70% of beginners wanted clearer instructions on using the catalogue with 60% of intermediates and 43% of advanced wanting clearer instructions. There was no significant difference on how often they visited the library.

- A sliding scale of request for more 'how to' guides occurs from beginners (54%) to intermediates (37%) to advanced (30%). Other than weekly users (55%) there was no significant difference on how often they visited the library (~35%).

- Improved working space was important to about 45% of respondents with no significant difference based on experience or how often they visited.

- Improved physical access to shelves was important to about 20% of respondents with no significant difference based on experience or how often they visited.

- More assistance in the library was important to about 36% of beginners, 23% of intermediate and 16% of advanced. With visit regularity, with the exception of regular visitors (weekly (5%); monthly (16%)), about 25% of respondents wanted more assistance in the library.

Other aids that were mentioned:

- Advice in person (Face-to-face assistance; advice from Genealogist; mentors/research buddies from experienced members; better informed, welcoming personnel)
- Improved equipment (working wifi, faster internet, modern film readers and appropriate lighting for using them, more tables with power sockets, guidance on using printers, better ventilation/air con, being able to book desks online)

- Improved access to collections (better signage, information on new resources, continued cataloguing of unique treasures, improved catalogue (speed and coverage), online instructions for preparing for visit, improve access to microfilms on closed access, map of parishes by county near county shelves) – people also commented 'I'm not sure what to do there [library] or how to make the most of it'; 'I'm sure I'm missing so much useful information because I can't find it effectively'.
- Opening (longer hours; Friday opening to coincide with attending talks on a Saturday)
- Online resources (general requests for more online data)
- Website (easier to navigate; more modern)

Overall, there are a number of items (some already covered by the outcomes of the Library Forums and being considered as part of why we are selling the building) that can help visitors and members use the collections the SoG hold.

Five most important Record Sets (Q9)

This was a freeform response so answers have been grouped as far as possible. There were responses from 23 Beginners, 143 Intermediates and 103 Advanced.

The Beginners ranked their results in the following order:

- Parish Registers (transcripts, copies of originals, etc)
- County Shelves Books
- Census
- Probate
- Memorial Inscriptions
- Family Histories
- Online Access
- Maps
- Apprentices
- Directories
- Military
- Textbooks
- Periodicals
- Overseas
- Professional (including schools and universities)

The Intermediates ranked the following:

- Parish Registers
- Memorial Inscriptions
- County Shelves Books
- Probate
- Family Histories
- Manuscripts
- Directories
- Professionals
- Census
- Online Access

- Pedigrees
- Apprentices
- Maps
- Textbooks
- Periodicals
- Military
- Marriage Allegations & Bonds
- FamilySearch
- Overseas
- Landed gentry, heraldry, royalty
- Religion

The Advanced produced the following ranking

- Parish Registers
- Memorial Inscriptions
- Manuscripts
- County Shelves Books
- Probate
- Family Histories
- Pedigrees
- Professionals
- Overseas
- Marriage Allegations and Bonds
- Directories
- Landed gentry, etc
- FamilySearch (microfilms and digital images)
- Apprentices
- Military
- Census
- Textbooks
- Periodicals
- Online Access
- Religion
- Maps

Some of the other collections that were put forward by respondents included: Birth Briefs, Boyds collections, IGI, Indexes (including Great Card & Bernau), Hearth Tax Returns, Court Indexes, British Record Society publications, Poll Books, Etymology, HMSO publications, Trinity House papers, Chancery records. In particular the unique collections and other hard to find items were mentioned in various ways.

Visits to Society of Genealogists (Q10)

337 people responded to this question.

Staff and volunteers being easy to approach and providing informative advice scored at the top end of the scale (excellent & very good). Welcome at the reception was generally good (good, very good, excellent). Middle ranking were 'clear guidance on where to find specific collections/documents, clean and pleasant common room, lecture room and good accessibility. The areas that scored lowest (however there was still a full range of responses from very poor to excellent) were adequate space to work and adequate facilities for using your own computer. These results are in-line with the current understanding of the staff.

Main reasons not to use the library (Q11)

486 responses, some with multiple answers. 289 irrelevant, which includes factors we cannot influence, e.g. distance, age, infirmity and time. Responders who attend the library and are happy but have speculated on reasons why they might not visit have not been included in the analysis below.

A few responders would cancel their membership if we moved out of London or to a less accessible area for them. General groupings:

Exhausted our holdings, finished researching, increase of online, relevant records unavailable	74
Physical environment (temperature, space, IT, state of building)	42
Insufficient knowledge of holdings, inability to find out	30
Opening hours	26
Travel costs, parking, other location and transport issues	21
Unwelcoming staff/volunteers, daunting	17
Membership/copying costs	2

When filtered on home location, those who live nearest (home counties and closer) often cite distance and other travel related issues as a factor.

Conclusion: Most people seem not to visit because they no longer feel they need to. The physical environment is also a major factor.

Most Important Factor about Society of Genealogist Library (Q12)

478 people responded to this question

40% stated it was the unique material not available elsewhere with a further 40% stating it was the single location for a wide variety of records.

7% stated it was the location for lectures and courses. None responded that it was for social interactions.

A small number of 'other' answers were provided including 'a great place for concentrating on your own research'; all the factors given above especially unique material; unique collection of parish registers/transcriptions; and access to LDS material.

Conclusion: The overriding benefits of the library are the unique material and the single location for records.

What else is important? (Q13)

369 responses with 25 irrelevant/blank. Some multiple responses. Some responders have evidently answered this as a wish list rather than an acknowledgement of actual current benefits/holdings and it is difficult to identify these. This especially seems to relate to the importance of digitised records. Responses are too diverse to categorise everything so just noted the types of response which occur most often.

It would be useful for trustees and management to browse the responses to this question separately to pick up the more negative, wish list type of response.

Wide variety/one stop	69
Unique/unusual records	56
Help/advice	41
Lectures	40
Other general messages of support	28
Social	25
Location	24
Deposited research	16
Browsing/serendipity	15
LDS affiliate	11
Access to computers/big data providers	7

Conclusion: Most important to the most people was a combination of the unique and unusual records coupled with the ability to research holistically (a one-stop experience). Lectures also figured prominently.

How often use SoG Data Online? (Q14)

478 people responded to this question.

About 20% use it monthly with a further 20% using it six monthly. Less than 10% use it weekly (noting more advanced users use it weekly (7%) than beginners (2%). About 30% use it rarely while less than 10% never use it (noting more beginners never use it (7%) than advanced (3%)).

Conclusion: Data Online is something that people go to on an infrequent basis rather than a regular basis however generally it is used by most respondents.

Where do you normally access commercial websites? (Q15)

473 people responded to this question. Unfortunately the responses indicate that people did not fully understand or comprehend the question. Several people responded that they accessed FamilySearch (noting it was the locked digital downloads that are available at an affiliate library that were being specified) at home and unless they are a member of the LDS this is not possible.

The limited information that could be gained is that the majority (65-85% depending on the website) access them at home. About 12% on average access them at SoG noting the FamilySearch access is 18% at SoG. An average of about 12% use them at another library or archive.

Conclusion: Although the data is limited, the SoG do provide a useful service in having access to the websites at the library. Noting from observations of computer use that, although many normally access at home, this does not prevent them using the access as part of the holistic use of the library when on site.

Which three datasets would you most like to see digitised? (Q16)

477 people (84.3% of the total responses) provided answers to this question.

These responses were analysed by the person's perceived level of expertise in genealogy, place of residence & frequency of visiting the SoG:

	People in Survey	Document Collection	Special Collections	Family Histories	Pedigrees	Monumental Inscriptions
Beginners	58	19 (14%)	9 (6.5%)	7 (5%)	6 (4%)	16 (12%)
Intermediate	315	136 (17%)	72 (9%)	67 (8%)	51 (6%)	119 (15%)
Advance	193	96 (20%)	67 (13.5%)	43 (9%)	46 (9%)	70 (14%)
Total		251 (18%)	148 (10%)	117 (8%)	103 (7%)	205 (14%)
Home Counties	255	130 (17%)	70 (9%)	54 (7%)	55 (7%)	121 (16%)
Further afield	311	122 (18%)	79 (12%)	64 (9%)	48 (7%)	84 (12%)
Total		252 (18%)	149 (10%)	118 (8%)	103 (7%)	205 (14%)
Weekly/ monthly	84	40 (19%)	21 (10%)	22 (10.5%)	14 (7%)	35 (17%)
Irregular users	482	212 (17%)	128 (10.5%)	96 (8%)	89 (7%)	170 (14%)
Total		252 (18%)	149 (10%)	118 (8%)	103 (7%)	205 (14%)

	People in Survey	Parish Registers	Probate Records	School & University	Name Rich Books	Totals
Beginners	58	35 (25%)	36 (26%)	9 (6.5%)	1 (0%)	138
Intermediate	315	150 (19%)	143 (18%)	35 (4%)	22 (3%)	795
Advance	193	57 (11.5%)	68 (14%)	29 (6%)	19 (4%)	495
Total		242 (17%)	247 (17%)	73 (5%)	42 (3%)	1428
Home Counties	255	136 (18%)	133 (18%)	32 (4%)	22 (3%)	753
Further afield	311	106 (16%)	114 (17%)	41 (6%)	20 (3%)	678
Total		242 (17%)	247 (17%)	73 (5%)	42 (3%)	1431

Weekly/ monthly	84	30 (14%)	32 (15%)	7 (3%)	9 (4%)	210
Irregular users	482	212 (17%)	215 (18%)	66 (5%)	33 (3%)	1221
Total		242 (17%)	247 (17%)	73 (5%)	42 (3%)	1431

Based on the person's opinion of the level of their own experience and expertise, beginners would like to see probate records and parish registers digitised first (51% in total voting for these two types of record) followed by the Document Collection (14%) as their third choice. Although no one source was selected in such a high proportion, the same three types of record were chosen by those in the intermediate group, being voted for by 54% of those who expressed their preferences, with monumental inscriptions coming in a close fourth place at 15%. Those who believed themselves to be more advanced genealogists favoured the Document Collection (20%), followed by probate records, monumental inscriptions and Special Collections, each being chosen by about 14% of those surveyed. They were far less interested by the digitisation of parish register transcriptions (11.5%).

Looking at where people lived, those who reside closest to the Society would wish to have parish registers, probate records, monumental inscriptions and the Document Collection digitised in equal measure, each group of records scoring 16% to 18%. For those who lived further afield, three of the same four groups proved just as popular, with Special Collections and monumental inscriptions being less popular options at only 12%.

Based on how frequently the person used the library and collections, the Document Collection and monumental inscriptions were most popular for digitisation, both scoring 17%-19% with regular visitors. Those were followed by parish registers and probate records, each being selected by 14% or 15% of those surveyed. Those who visited more irregularly chose parish registers, probate records and the Document Collection at the same level of preference, with monumental inscriptions being a less favoured option at only 14%.

In all groups, the other four types of source material were far less popular candidates for digitising with family histories and pedigrees coming just behind Special Collections (ranked at about 10% in the poll) at about 7% or 8%.

What else would you like to be digitised? (Q17)

207 people responded to this question. Of those, a further 46 provided a null response, 19 gave a general (digitisation is good) response and 23 said digitise everything. A further 59 responded with the collections presented in the previous question.

The remaining responses included for beginners:

- Indexes of Innkeepers from County or other records
- Court records

For intermediates:

- Indexes to Newspaper archives
- *Colonial records
- Stillborn indexes
- *Apprentice lists
- Hearth tax

- Muster rolls
- *Poor law
- Legal items
- Morants book on Essex
- German records
- Parish Vestry records
- Maps

- *Army & Navy records
- *BMD certificates

For intermediate and advanced:

- *Marriage Bonds/Allegations
- Census
- *Card Indexes (inc the Great Card Index)
- *Poll Books (in particular three books edited by Caroline Fenwick on 'The Poll Taxes of 1377, 1379 and 1381)
- *Directories
- *Birth briefs
- *Rare & out of print books

For advanced:

- Old indexes including Bernau
- Early record series (medieval)
- *Index to London & NER staff cards
- Genealogical art
- *Older professional directories
- *Irish Records
- *Indexes to contents of books and periodicals
- *16th-17th C books
- WWI Casualty Lists
- Livery companies and freemasons

All items with a star already have some records on Data Online. This implies that not everyone is aware of the full extent of coverage that already exists on Data Online. Further promotion along with aids to finding items on Data Online is required.

Which of the following criteria would you most be supportive of reducing our onsite holdings? (Q18)

461 people (81.4% of the total responses) provided answers to this question. These responses were analysed by the person's perceived level of expertise in genealogy:

	People in survey	Printouts (in collections)	Textbooks	Recent periodicals	Computing periodicals	Census microfilms
Beginners	58	21 (12%)	29 (16%)	18 (10%)	35 (20%)	17 (10%)
Intermediate	315	154 (13%)	180 (15%)	94 (8%)	230 (20%)	122 (10%)
Advanced	193	118 (15%)	100 (12.5%)	66 (8%)	135 (17%)	111 (14%)

Total		293 (14%)	309 (14%)	178 (8%)	400 (19%)	250 (12%)
	People in Survey	County censuses	Offsite holdings	Royalty	Annual directories	Totals
Beginners	58	3 (2%)	21 (12%)	26 (15%)	8 (4.5%)	178 (8%)
Intermediate	315	55 (5%)	137 (12%)	149 (13%)	47 (4%)	1168 (54%)
Advanced	193	78 (10%)	84 (10.5%)	83 (10%)	25 (3%)	800 (37%)
Total		136 (6%)	242 (11%)	258 (12%)	80 (4%)	2146

In most categories, there was little difference in the choice of records, which would be chosen to be removed from the holdings, based on the perceived level of expertise or experience of the person surveyed. However, in the case of county census indexes, advanced genealogists were five times more likely to be prepared for them to be taken off the library shelves at 10%. The most popular choices for removal were the computing periodicals (19%), print-outs from online databases (14%), out-of-date textbooks (14%), census microfilms (12%) and royalty sources (12%).

Which other institutions do you have a reader's ticket for? (Q19)

377 people (67% of the people who answered the survey) provided answers to this question.
These responses were analysed by the person's perceived level of expertise in genealogy:

	People in survey	British Library	TNA	IHGS	CARN (etc)	Wellcome Library	Total
Beginners	58	8 (23.5%)	14 (41%)	0	12 (35%)	0	34 (4%)
Intermediate	315	78 (21%)	134 (35%)	9 (2%)	150 (40%)	8 (2%)	379 (47%)
Advanced	193	91 (23%)	133 (34%)	10 (3%)	127 (32.5%)	30 (8%)	391 (49%)
Total	566	177	281	19	289	38	804

The readers tickets held by the three groups of researchers varied depending on their perceived level of expertise. Of the total sample, only 4% of the cards were obtained by the beginners. Those few that did have cards, surprisingly mainly used The National Archives (41%) and, to a lesser extent, the British Library (23%). 35% of that group regularly used county or local archives which required cards.

Almost all of the types of entry cards were held by intermediate and advanced genealogists. Of the 315 intermediates, there was an average of 1.2 cards per person whilst the 193 advanced genealogists had, on average, two of the five categories of card. Most used TNA and local archives with a smaller percentage using the British Library. The Wellcome Library was well used by the advanced group.