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Pop-Up Survey: Findings from the Building a National Finding Aid Network Project

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The views, findings, conclusions or recommendations expressed in this project do not necessarily represent those of the Institute of Museum and Library Services.

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INTRODUCTION

This paper summarizes the findings from a national survey of end users searching for archival materials online, which was conducted as a part of the Building a National Finding Aid Network (NAFAN) project by OCLC from March–May 2021. The survey captures data about search behavior, information needs, and demographic characteristics from a cross-section of online users.

In 2020, IMLS awarded the California Digital Library (CDL) a National Leadership Grant to support Building a National Finding Aid Network, a two-year research and demonstration project to build the foundation for a national archival finding aid network to address the inconsistency and inequity of the current archival discovery landscape (LG-246349-OLS-20). CDL led the project, with partners at OCLC, University of Virginia Library, Shift Collective, and Chain Bridge Group. Work on the grant was done in parallel across multiple activities:

- Research investigating both end user and contributor needs in relation to finding aid aggregations
- Evaluation of the quality of existing finding aid data
- Technical assessments of potential systems to support network functions and formulating system requirements for a minimum viable product instantiation of the network
- Community building, sustainability planning, and governance modeling to support subsequent phases moving from a project to a program

OCLC Research is leading efforts in the first two areas. This paper focuses on research investigating end user needs in relation to finding aid aggregation.

The NAFAN national pop-up survey captured data from users that visited archival aggregation websites in March–May 2021. Twelve archival aggregators hosted the link for the pop-up survey on their platform for six weeks, resulting in over 3,300 complete responses. The survey prompts addressed the following research questions:

- Who are the current users of aggregated archival description?
- Do current user types align with the persona types and needs identified in recent archival persona work (i.e., what characteristics are present versus not)?

This report details the methods and findings from the pop-up survey followed by an analysis and discussion, including a series of recommendations for the NAFAN platform. To our knowledge, this is the first survey targeting archive users' search behavior, search needs, search expectations, and search practices at this scale and breadth. This report is not standalone and should be read with the NAFAN findings reported from the individual user interviews.¹

Background

This section provides a brief but comprehensive overview of existing research on users of archival materials online. When the NAFAN project set out to design the survey described in this paper, we consulted the published literature for two important reasons: first, to understand who the users of archival materials online are, how much is already known about their search behavior, their information needs, and their demographic characteristics, and second, to recreate or repurpose questions from previous surveys to validate work conducted before NAFAN. Following a literature scan, the NAFAN team determined that no prior studies have captured a cross-section of users that describes the breadth of search behavior or information needs at the scale that the NAFAN team desired. It is important for the NAFAN project to understand users of archival materials online and of archival aggregation websites, to ensure that a national finding aid network meets the needs of its users. Therefore, the NAFAN study designed a first-of-its-kind survey that would address the project's goals and inform the future development of a NAFAN portal. The summary of existing literature below provided the baseline understanding of user research and user experience research in archival studies that informed the NAFAN team as it developed the survey.

Archival user studies

One major challenge for the NAFAN project is the lack of information about users of archives and, specifically, users of archival aggregator websites.² In fact, the planning grant report that precedes the current NAFAN research observes, “we lack a broad understanding of how users interact with, navigate between, interpret, and utilize an expanding universe of descriptions” in aggregation.³ Aggregators that participated in the planning grant “have little or no data identifying users,” and OCLC Research identified only one user study aimed at understanding the diversity of users and their experiences with the aggregation site performed by an archival aggregator for its online users.⁴

Archival user studies do exist, though there is limited work that focuses on online users of archival resources generally and archival aggregators specifically. The field of archival user studies began in the 1980s with moderate growth in the number of studies conducted until today. According to Hea Lim Rhee, there has not been a significant increase in the number of studies conducted due in part to the collections-first focus of the archives profession and insufficient resources to take on user studies at the institution level.⁵ Academic researchers have collected most of what is known about archival users since the early 2000s.⁶ The bulk of this work helps to define the user journey when seeking out archival materials and understand their information needs (trends, research topics, questions), information-seeking behavior (tools, access problems, preferred format of materials, and research strategies), and information use (citation patterns).⁷

Archival user research is dominated by one-time studies that “focus only on user studies dealing with specific research topics.”⁸ This has built an understanding of subgroups and how they search for primary sources, but it does not show consistency or overlap between users and only represents a portion of the different types of users of archives. Studies on information need have provided a great deal of information about subgroups of researchers across disciplines and areas. Most of these studies focus on researchers that come in person to academic archives to conduct research, including community members and academics. Specific subgroups that have been studied include agriculture scholars,⁹ art historians and artists,¹⁰ Asian studies scholars,¹¹ documentary filmmakers,¹² genealogists,¹³ historians,¹⁴ public health scholars,¹⁵ and religious studies scholars.¹⁶

What is known about archival aggregation users comes from a 2012 commissioned assessment from the California Digital Library of its aggregator platform, the Online Archive of California (OAC), and its sister image repository Calisphere. This study employed a pop-up survey to capture user information, web usage analytics analysis, and interviews with contributors. The study found that the number of users of Calisphere was much larger than previously understood. Users expressed a desire to access digitized resources, functionality for connected content across platforms, and user tagging capabilities.¹⁷ Aggregators that participated in the planning grant leading up to NAFAN were provided with several user profile types that assume overlap between in-person and online users. These are:

- K-12 students
- College/university undergraduate students
- College/university graduate students
- College/university faculty (primary focus: teaching/classroom)
- College/university faculty (primary focus: research/scholarship)
- Digital humanists
- Professionals (non-academic researchers; administrator; legal researchers)
- Creative artists (visual, writers, musicians)
- Genealogists/family historians
- Other

When asked to specify which users visited their sites, archival aggregators confessed that they selected all user types listed based on instinctual knowledge.¹⁸

The lack of data about archival aggregation users and user behavior is perhaps unsurprising when you consider the respondents and methods used to capture data from users of archival online resources. Rhee counts survey methods as the most used research method employed in user studies, followed by interviews as the next most common.¹⁹ In a review of these studies, surveys and interviews are used together frequently. Early user studies tended to be qualitative, as most exploratory social science tends to be. These studies often targeted in-person users and used snowball sampling to identify participants. Surveys are primarily employed as a means to describe the overall information behaviors of archival subgroups and are often gateways to identifying participants for individual interviews or focus group interviews. Responses to surveys of users of archives are typically small, with sample sizes less than 500, making the data not generalizable or normally distributed. Rhee notes that in 2015, all surveys in archival user studies were mailed to participants, indicating that participants were first identified through means such as registration or logs kept at archives, contact through academic departments, or other means wherein mailing address could be obtained. Research studies with this level of investment in both time and cost are difficult to develop with consistency. Given that these studies also are not randomized, and rely on purposive convenience sampling, there also was no means to establish a broad overview of archival users. To this day, no such data is available, and by extension, there has not been a randomized national sample survey of archival users.

In addition, surveys of archival users did not ask demographic questions or did not report on them. Age, gender, and location are not easily identifiable from reported findings. For example, it is not known whether respondents to prior surveys span an age range or cluster together. The only demographic reported with regularity is profession, and that appears most often to be a primary

selection criterion for qualitative studies. The Calisphere study in 2012 is the only example in the current literature to ask web visitors their profession.²⁰ The lack of guidance the NAFAN team could rely on from previous studies led us to the conclusion that the pop-up survey would be the first to include several demographic questions. Another conclusion from the literature scan of archival users is that what is known about these users' information needs and their behavior pertains to their experiences in the reading room. Their research journey, or what satisfies their needs for information, can depend on the resources they have for getting information or access to archival materials. The NAFAN project needed more information specific to the online information journey for users seeking archival resources to inform its development.

Archival users online

As far back as 1995, archivists and academic researchers have called for frequent and rich research into online users, stating, "the development of Web sites makes information about archival repositories and even items from collections themselves available to a dramatically larger, virtually unknown audience."²¹ This suggests that users who connect with online archival finding aids or repository websites could be different from in-person archival users or unknown in their information-seeking behavior. In fact, Andrea Rosenbusch's study of extant archival website databases notes that archival repository website development is "almost exclusively supply-side driven," furthering the idea that online access to archives is generally developed without user input.²² This has been changing with the development of new systems and platforms for archival content management and special collections discovery and delivery.

New online archival user research focuses on user experience and has broadened from surveys and interviews to the development of user personas. Several archives software development projects have invested in this type of user research to create user personas to inform their development process. Two examples of recent persona projects are from Stanford Libraries for the ArcLight archival discovery platform, and by the Rockefeller Archive Center for Project Electron, which supports the acquisition, management, and preservation of archival digital records. Both efforts focus on archives and library staff as well as researchers.²³ Other user persona profiles exist for the archives collection management system ArchivesSpace to inform the development of its' user interface, and for two aggregators: the Northwest Digital Archive/Orbis Cascade Alliance and the Online Archive of California.²⁴

Other research on the online user experience in archival user studies focuses on user experiences with online finding aids and archival description and digital surrogates of primary materials.²⁵ These studies tend to lean on the user types identified for in-person users and heavily weigh the experiences of archivists and librarians as users. However, there is little information about more diverse types of users and their experiences discovering and accessing archival resources online.

Archival aggregators

Development of archival aggregators in the United States started in the late 1990s, with many still in existence 25 years later. Since 2010, only three new aggregators have emerged, though some of the older ones have shuttered.²⁶ Those extant at the time of the pop-up survey were:

1. Archival Resources in Wisconsin
2. ArchiveGrid
3. ArchivesWest
4. Arizona Archives Online
5. Black Metropolis Research Consortium
6. Chicago Collections Consortium
7. Connecticut's Archives Online
8. History of Medicine Finding Aids Consortium
9. Online Archive of California
10. Philadelphia Area Archival Research Portal
11. Rhode Island Archives and Manuscripts Online
12. Social Network Archival Collections
13. Texas Archival Resources Online
14. Virginia Heritage

With the exception of the Calisphere study cited above from the California Digital Library, no other user studies of archival aggregators were shared with the NAFAN team.

In order to build a survey that captured data about the breadth of online users that seek archival materials, the NAFAN team relied on the questions about information needs and information-seeking behavior from archival user studies and included several new questions about demographics. The result adds value to the field of archival user studies through the survey methods and the data reported by the respondents on their search behavior. It also helps to inform the archival aggregators about their users, where no data exists, and the future development of NAFAN through its breadth.

Methodology

The NAFAN project research helps address the lack of information about a broad spectrum of archival users and how they discover and access archival materials online. The NAFAN pop-up survey is designed to take a comprehensive approach to understanding the breadth of users and the depth of their search behavior across different aggregators.

Developing and disseminating the survey

Twelve of the 14 extant archival aggregators acting as partners on the NAFAN project were asked to host the pop-up survey on their websites to gather information directly from online users (see [appendix A for the full survey questionnaire](#)). Each aggregator hosting the pop-up survey was instructed to post the embed link on their aggregator portal's homepage, on search results pages, and on the landing page for each finding aid published within the aggregator site. This approach captures online users no matter how they land on the aggregator website, whether visiting the site directly or following a link from another website or search engine results. The entire data collection period spanned roughly two months with each aggregator holding the survey open for at least six weeks between March–May 2021. Some aggregators faced delays in launching the survey for technical reasons, which resulted in a data collection window of staggered, and sometimes overlapping, open periods of collection at each site. Two aggregators experienced significant delays.

The grant application materials to IMLS in 2019 for NAFAN included a draft survey questionnaire. This draft was based on previous OCLC Research user surveys for WorldCat.org and ArchiveGrid. After receiving grant funding, OCLC Research consulted recent archive-focused persona work, such as the 2012 assessment of Calisphere and OAC, findings from the planning phase of NAFAN, and OCLC Research colleagues to draft archives-specific questions.²⁷ OCLC Research colleagues and the NAFAN Research Advisory Group were asked to pretest the new questionnaire and provide feedback. Project staff then programmed the survey into SurveyMonkey and tested it for flow, skip logic, and other functionality, and then worked with each aggregator to pretest the functionality on their sites. The protocol received clearance from the UCLA Institutional Review Board prior to launch. Respondents were given the option to enter a raffle for a \$100 gift card incentive.

Sampling frame

Like the user studies described above, the sampling strategy for the pop-up survey was not randomized. Instead, a purposive convenience sample method allowed users to opt into the survey. OCLC Research considered a targeted probability-based sampling approach at the outset. There was no way to develop the probabilistic mechanisms for sample selection without prior studies detailing the population of users of archival aggregation, therefore the study team opted for a convenience sampling. While the inability to make an inference from the data presented a challenge, fielding the survey across all of the aggregators would blanket the entire potential user base and allow for a more holistic picture of users no matter where they search or why.

The initial national target was 1,000 total responses. The NAFAN team did not set a target per aggregator website. Given the wide variability in use rates across aggregators, which ranges from 20 to 141,000 visits per month, it would be impossible to get comparable response numbers across

all sites. This variability across aggregators stemmed from several issues, including an aggregator's established presence, whether or not their content is indexed by search engines, and the quantity of available searchable archival descriptions. The total survey response far exceeded expectations with 3,352 usable responses across all aggregators.

Not every user received the pop-up invitation to take the survey, however. Monthly website traffic provided by each aggregator helped determine the frequency rate for the pop-up. This step purposely undersampled from sites with high traffic and oversampled for sites with lower traffic each month. While not a probabilistic method, or a weighting strategy, it ameliorated some of the selection bias from users of aggregators that have high visitation rates each month. It did not prevent self-selection bias. For the seven participating aggregators with lower traffic, the pop-up survey appeared for every user; for the five sites with a higher rate of use, the pop-up survey appeared for every other user. This strategy provided an opportunity for a broad cross-section of users to respond.

Post-collection processing and data preparation

After the close of the data collection period, data were cleaned and prepped for analysis in statistical software applications. Post-collection processing included reviewing and recoding write-in responses to several questions, such as material preference type, reported profession, sources searched by respondents in addition to aggregators, and project purpose.

Data were prepped for a follow-on collection after cleaning. Survey respondents were invited to sit for one-on-one individual interviews through a screening question in the pop-up survey. A truncated list of survey respondents willing and interested in sitting for an interview was prepared for further analysis, and demographic information and contact details for potential interviewees were shared with project team members. More detail about the individual interview methods process is summarized separately.²⁸

Limitations

The pop-up survey method and data have limitations like all studies. Particular issues arise from the representativeness of the survey respondents. Without a known universe of online archival users, or archival aggregation users specifically, there is no way to sample for subgroups, weight responses for overrepresentation or underrepresentation, and no way of knowing whether the respondents to the NAFAN pop-up survey are representative of archival aggregation users. Additionally, the NAFAN convenience sampling strategy results in a higher-than-expected number of respondents from California (29.0%, N=988) at one-third of the overall sample and the Online Archive of California at roughly half of the sample (45.3%, N=1,545). The impact of this overrepresentation of users from California and the OAC aggregator is unknown. It is known that OAC has much higher monthly traffic than all other archival aggregators. Respondents from the Online Archive of California are split with roughly half (42.4%, N=773) of users from California and the other half distributed from across the United States. Other users from California came to the NAFAN survey through other archival aggregators.

The NAFAN pop-up survey does not include race or ethnicity in the survey demographics. OCLC Research acknowledges that this is a limitation of this study. We always consider the need for sensitive data prior to including it in data collection instruments, opting not to collect sensitive

data we are unsure how we might use. According to Pew Research Center's Internet/Broadband Fact Sheet from 2021, Whites, African Americans, and Hispanic or Latino users, who are college graduates or have completed some college, make up 98% and 97% of users online.²⁹ Because both race and ethnicity are highly correlated to education in internet users, and this study focuses on archival users from a broad population of online users, we decided to only collect information about education level and not about race or ethnicity. In retrospect, especially given the exploratory nature of the study, we would reconsider this decision.

Delays in disseminating the survey impacted two aggregators; they may have reached more users if given more time during the data collection period. Findings are reported in raw percentages and are not weighted to generalized inferential comparisons.

Findings

This section describes the findings from the NAFAN pop-up survey. The findings respond to the primary research questions informing this pop-up survey:

- Who are the current users of aggregated archival description?
- Do current user types align with the persona types and needs identified in recent archival persona work?

These are key takeaways that help to describe the pop-up survey respondents and should not be used to generalize to the universe of archival users.

Understanding archival aggregation users

DEMOGRAPHICS

This section describes users by demographic characteristics to provide a broad overview of who the users of archival aggregation are by age, profession, education, and state of residence. Questions about age, education, and geographic location are unique data to the NAFAN survey. The professions provided to users in the survey are adapted and expanded from the Calisphere report in 2012.³⁰ Post-collection processing recoded write-in answers from respondents that indicated they are no longer full-time employed to add a category for retirees. This also is a first for archival user studies and online archival user studies.

NAFAN Pop-Up Survey Users' Profession

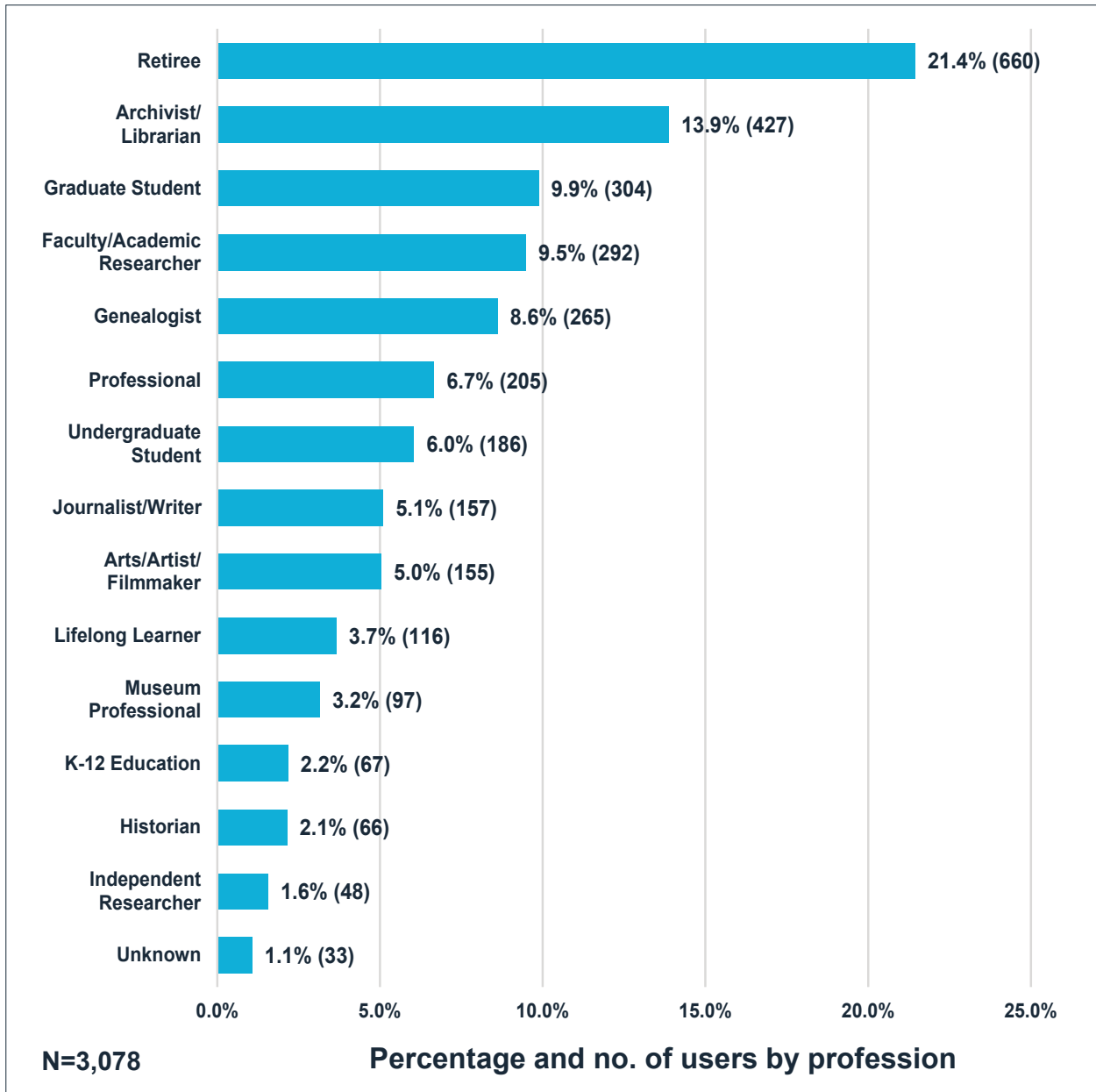


FIGURE 1. NAFAN pop-up survey users' profession. Note: Profession categories in this chart include those provided to users and write-in answers. Users could only select one profession.

Figure 1 shows all reported professions ranked from most frequently to the least frequently reported. The highest portion of survey respondents (21.4%) reported retiring from full-time employment. Information professionals are the next-highest ranked profession; librarians and archivists comprise 13.9% of respondents. Archivists and librarians offered contextual information on why they visit aggregation sites by providing anecdotal statements in the survey about the need to fulfill work-related responsibilities, such as reference work for users or collection development. Roughly half (49.0%) of respondents work in various professions where researchers commonly perform their research in archives, such as archivists and librarians, faculty and academic researchers, graduate students, genealogists, historians, and artists/filmmakers.³¹

The remaining professions (28.3%) are less studied in the archival user literature. These are journalists, writers, museum professionals, K-12 educators, and independent researchers. Collectively, retirees and other understudied professions were 49.8% of NAFAN respondents.

NAFAN Pop-Up Survey Users' Age

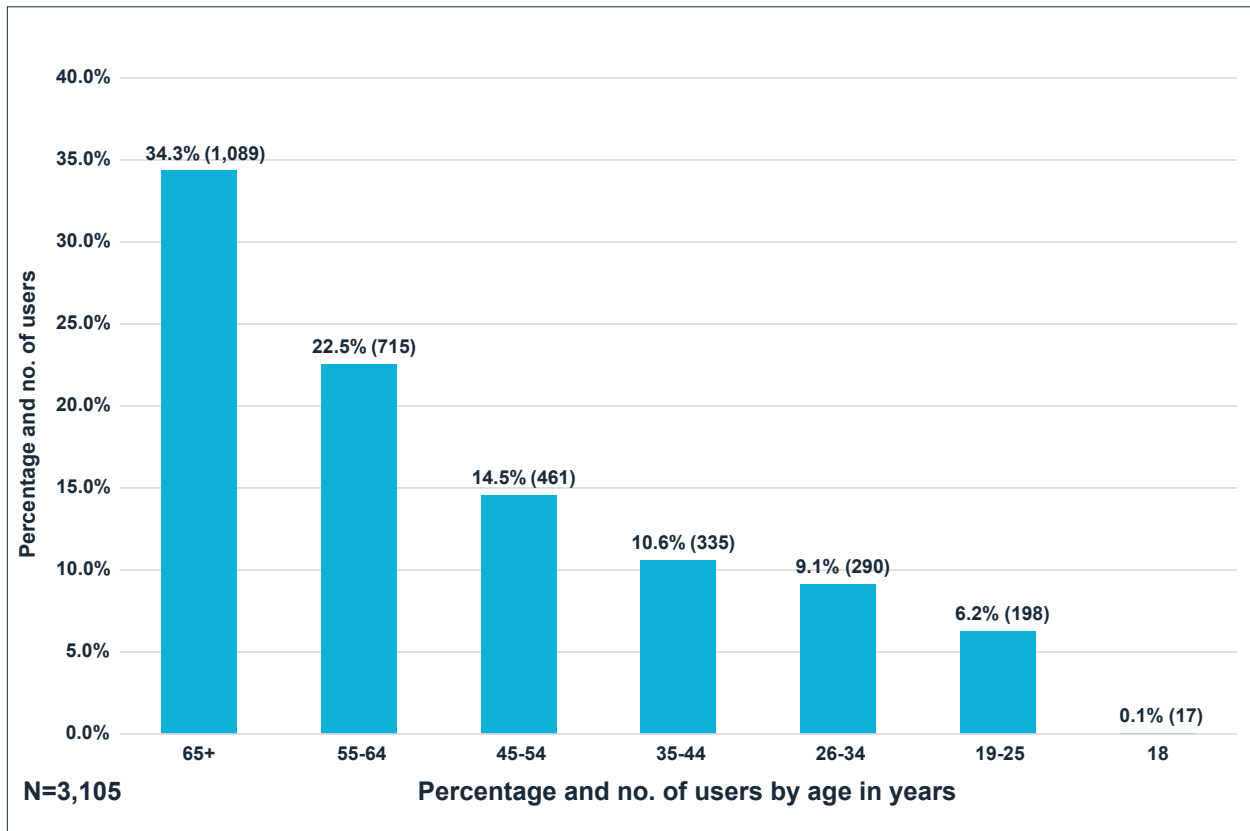


FIGURE 2. NAFAN pop-up survey users' age. Note: 2.1% of respondents did not report their age. Users could only select one age category.

For age distribution (see figure 2), the highest percentage of the survey respondents were in the oldest (65+ years old) group of respondents. Below the age of 55, the next highest group of respondents is aged 45-54 at 14.5%, followed by 10.6% of respondents in the 35-44 age range. Roughly the same percentage of respondents who indicated they were undergraduate students (5.9%) reported they are 19-25 years of age (6.2%).

NAFAN Pop-Up Survey Users' Education

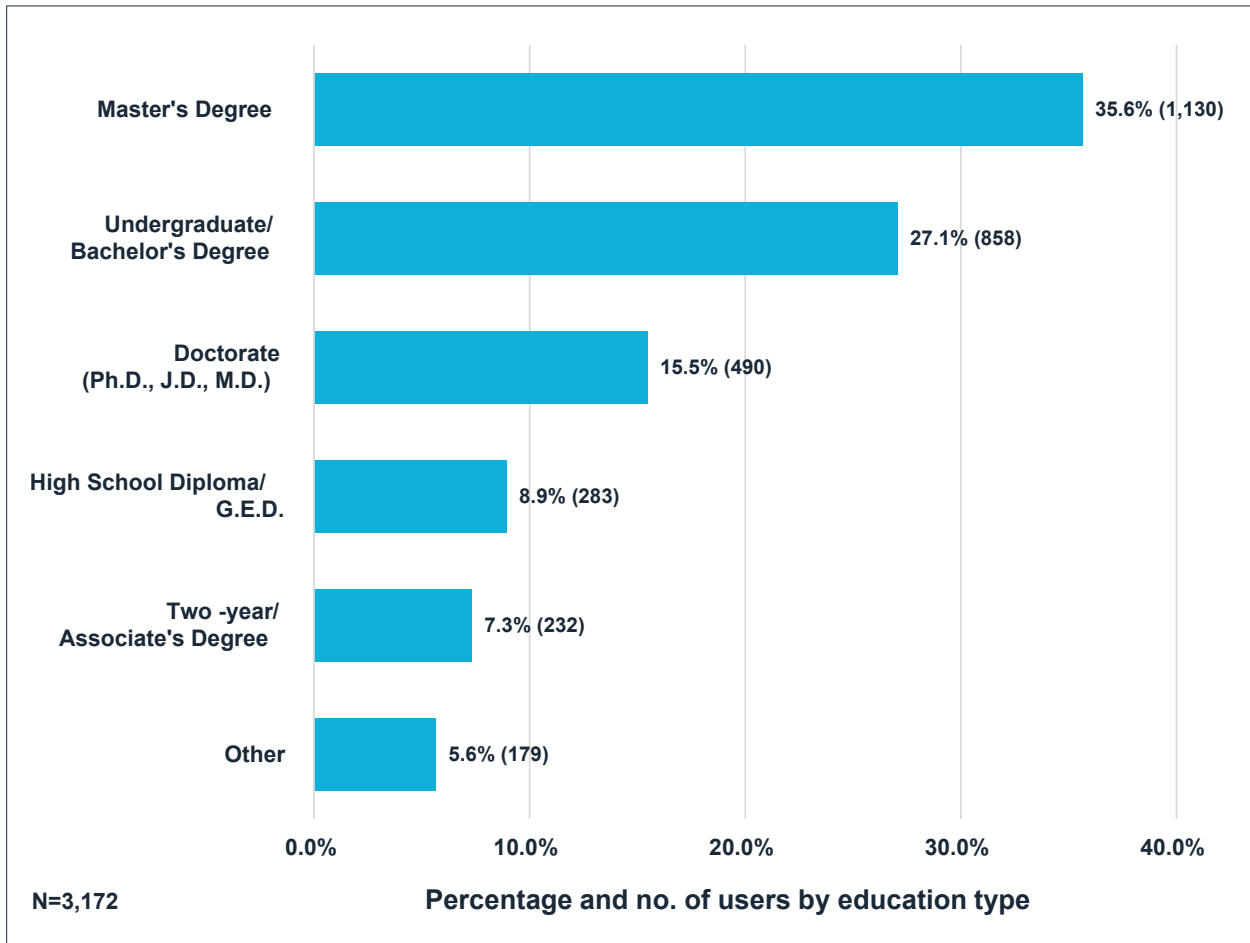


FIGURE 3. NAFAN pop-up survey users' education. Note: Users could only select one education category.

Figure 3 reports on educational attainment for respondents. The top three reported degrees include undergraduate and graduate education (78.2%). One-third of NAFAN respondents (35.6%) signaled that they hold a master's degree. Responses to "Other" include such degrees as technical college, trades and professional training, and individuals with more than one graduate degree.

Nearly 30% of survey respondents came from California, followed by other populous states, such as Texas (8.7%), Virginia (5.7%), Washington (4.9%), and New York (3.8%). Figure 4 displays each aggregator and the percentage of users that came to the survey through that aggregator. Archival aggregation websites are free and open resources on the web for all researchers. They are maintained by state, regional, or academic institutions, which is typically indicated by the name. Users can access any aggregator regardless of location, so use of a state or regional aggregator does not necessarily indicate the user resides in that state or region. California is again at the top with the Online Archive of California (OAC) capturing 45.3% of the users from across the US, followed by Virginia Heritage with 13.3% of users, ArchiveGrid with 11.7%, Texas Archival Resources Online (TARO) with 9.5%, and ArchivesWest with 8.7% of users. Roughly half (42.4%) of Online Archive of California users stated they were located in California meaning that half of OAC users are drawn from across the country.

Archival Aggregators Sorted by Number of Users in the Survey

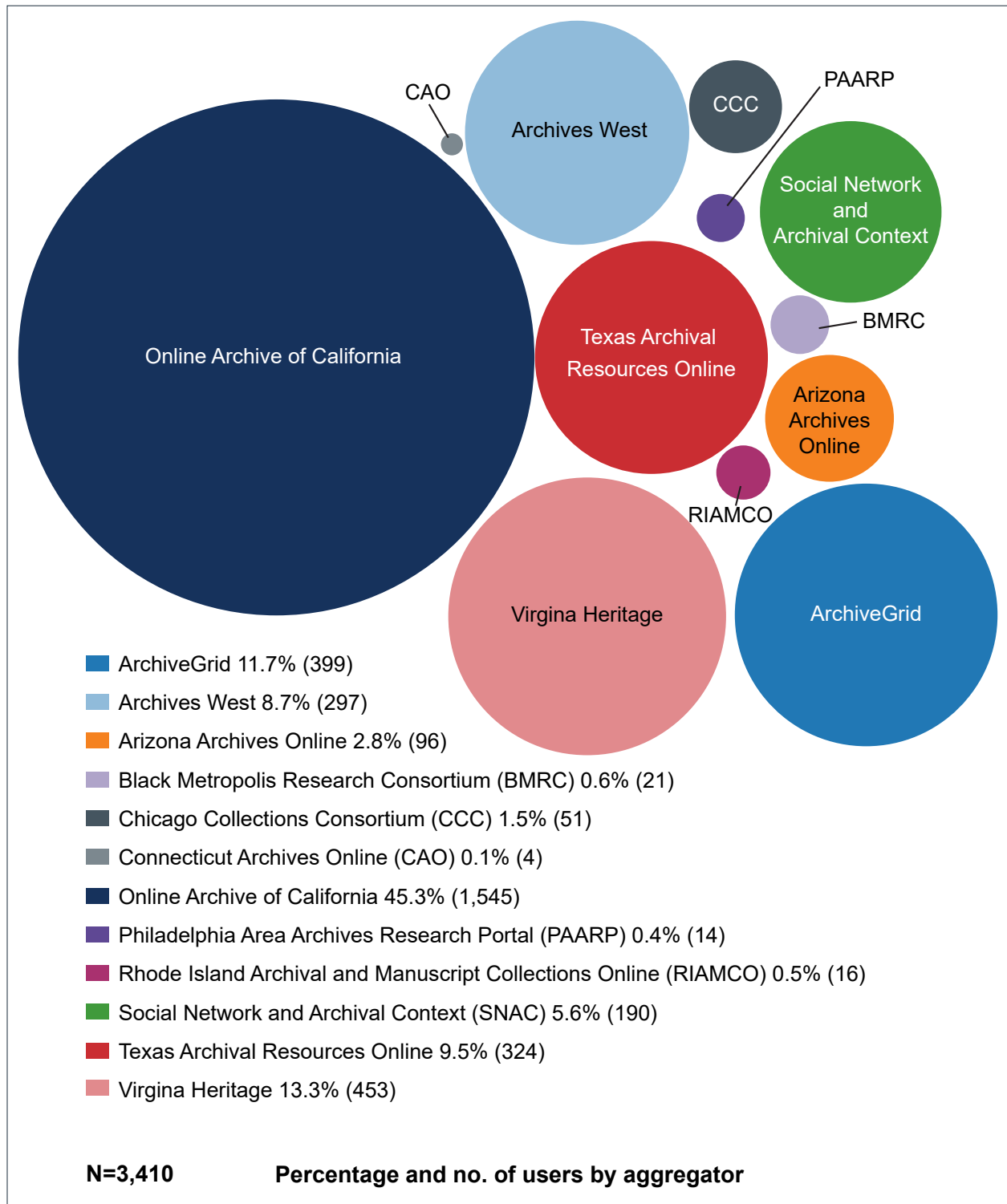


FIGURE 4. Archival aggregators sorted by number of users in the survey.

WHAT ARE USERS' INFORMATION NEEDS?

Survey questions targeted at information needs covered topics such as the nature of the research project, the user's material preference for that research project, and how they prefer to access materials for their project (see figure 5).

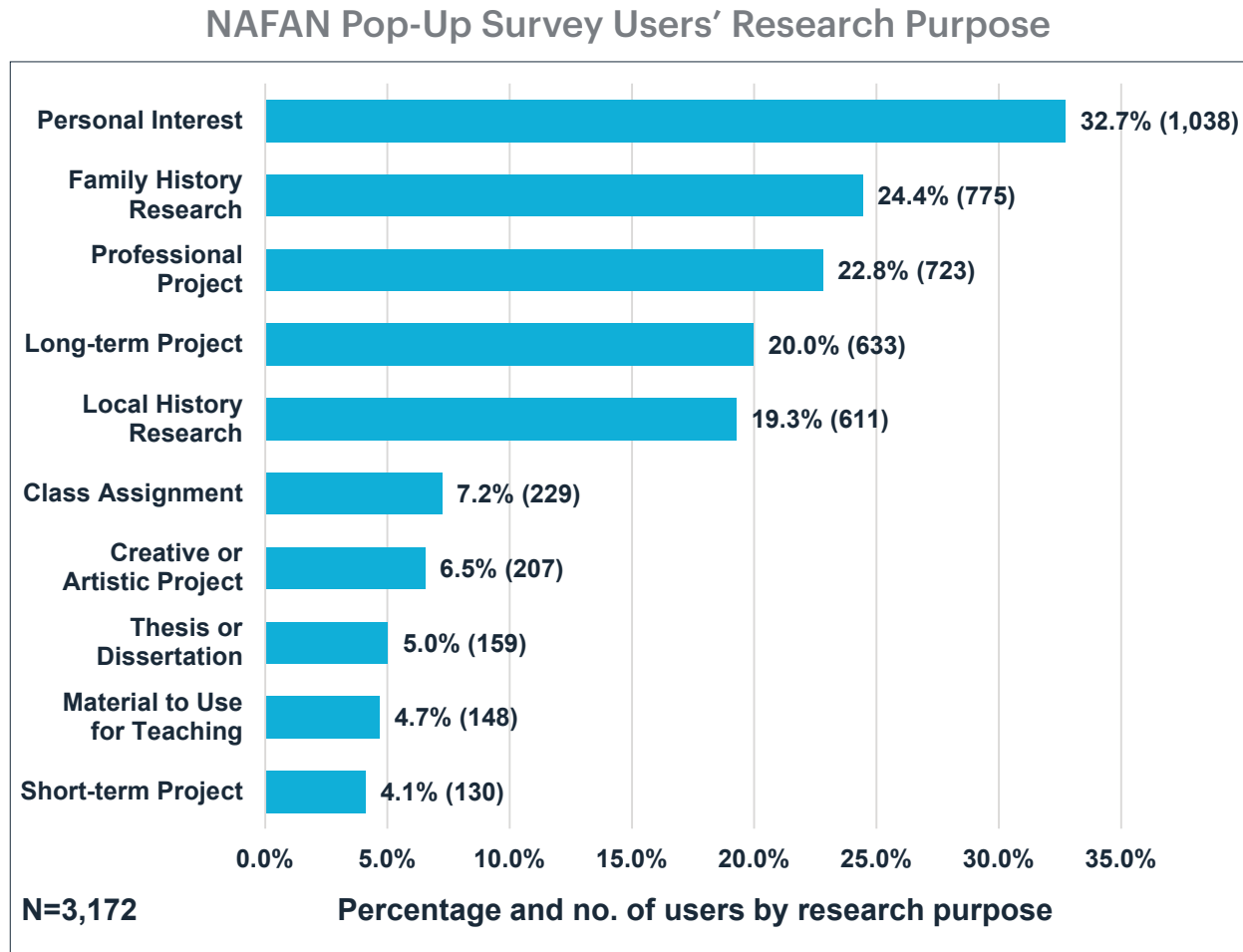


FIGURE 5. NAFAN pop-up survey users' research purpose. Note: Totals do not sum to 100%. Users could select more than one project purpose.

Long-term projects include books, documentaries, or other projects that take months or years. Short-term projects include news articles, television projects, or other projects that take days or weeks. Long-term projects also overlap with several other response options. Twenty-seven percent (26.9%) of local history projects also are long-term projects and professional projects (27.1%). Class assignments, creative or artistic projects, theses or dissertations, teaching material, and short-term projects account for fewer than 35% of responses and overlap with personal interest more than any other option.

When looking deeper at the selections made by subgroups, we see overlapping interests within and between groups. Archivists and librarians indicated that their aggregator use is focused (17.3%) on professional projects. Write-in answers from archivists tells us that these job-related duties include performing reference for patrons, performing research for their own archive or library, and "regular work activities" like uploading finding aids into the aggregation site and updating catalog records (see table 1).

TABLE 1. NAFAN pop-up survey users' responses for project purpose by top five professions.

Project purpose	Archivist/ librarian	Faculty researcher	Genealogist	Grad student	Retirees	Row total*
Class assignment	2.7% N=12	3.3% N=10	1.3% N=4	25.8% N=71	0.3% N=2	33.4% N=99
Creative project	1.1% N=5	5.4% N=16	0.0% N=0	6.9% N=19	4.6% N=31	18.0% N=71
Family history	7.1% N=32	6.0% N=18	89.3% N=285	12.0% N=33	37.9% N=258	152.3% N=626
Local history	14.6% N=66	16.7% N=50	23.5% N=75	10.2% N=28	21.6% N=147	86.6% N=366
Long term project	10.6% N=48	50.2% N=150	12.9% N=41	21.5% N=59	13.2% N=90	108.4% N=388
Material for teaching	5.1% N=23	16.4% N=49	1.9% N=6	4.7% N=13	1.0% N=7	29.1% N=98
Personal interest	14.4% N=65	18.1% N=54	22.3% N=71	22.2% N=61	48.8% N=332	125.8% N=583
Professional project	17.3% N=78	35.1% N=105	2.2% N=7	14.9% N=41	3.7% N=25	73.2% N=256
Short term project	3.3% N=15	2.3% N=7	1.3% N=4	5.8% N=16	1.2% N=8	13.9% N=50
Thesis or dissertation	0.4% N=2	2.7% N=8	0.3% N=1	43.6% N=120	0.3% N=2	47.3% N=133
Other	27.9% N=126	7.4% N=22	2.5% N=8	2.9% N=8	8.7% N=59	49.4% N=223

*Note: Totals do not sum to 100% for each column and row. Users could select more than one response option.

Faculty and academic researchers (50.2%) indicated that their primary purpose for using an aggregation website at the time of the survey was a long-term project, which is followed by professional projects at 35.1%. Genealogists selected family history as their project purpose at 89.3%, followed by personal interest at 22.3%. Forty-three percent of graduate students stated that

their aggregator use focused on a thesis or dissertation followed by long-term projects at 21.5%. Personal interest is the primary project purpose selected by retirees at 48.8%. Family history is another motivating reason retirees are searching on aggregators at 37.9% of projects.

NAFAN Pop-Up Survey Users' Material Preference

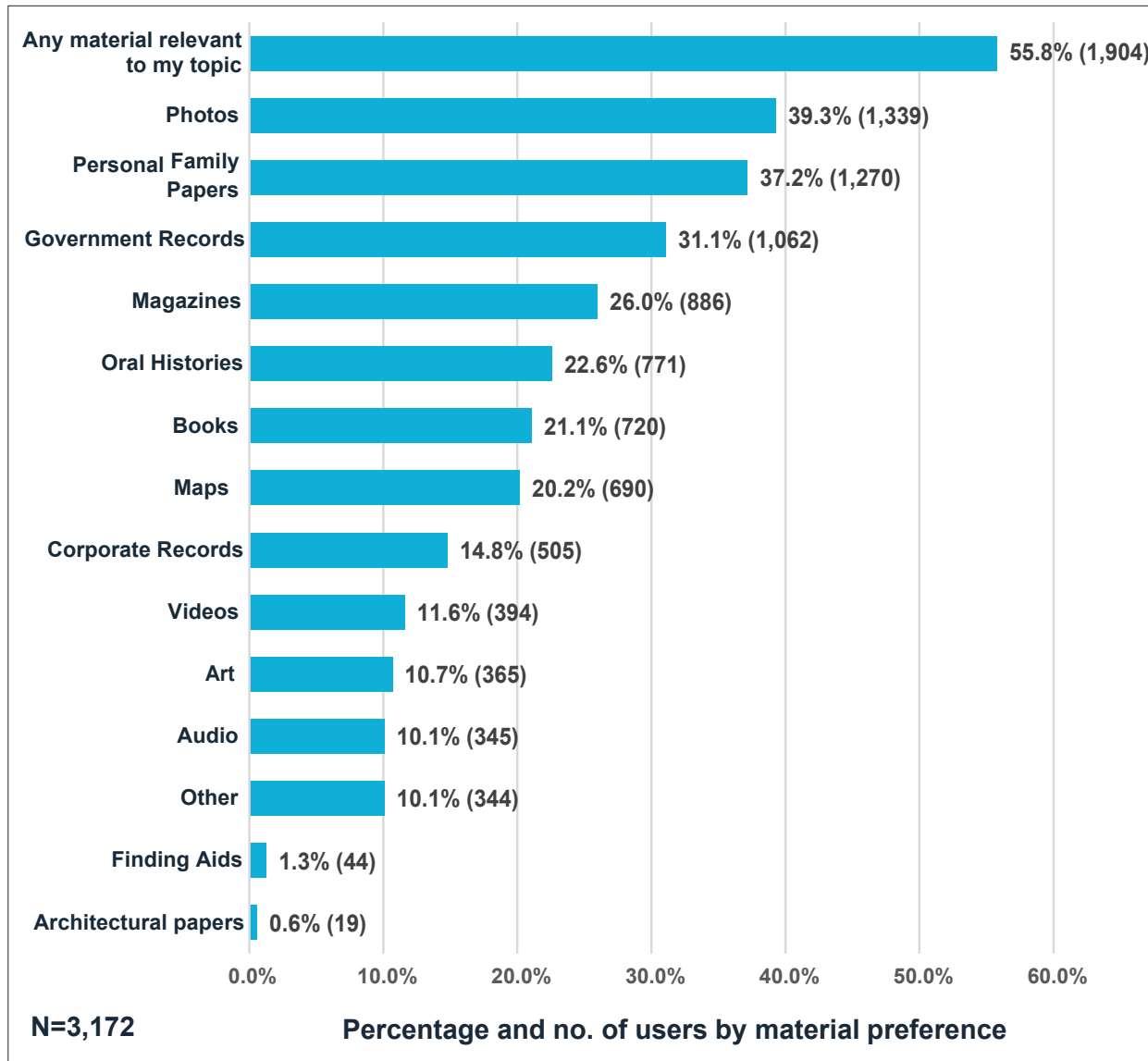


FIGURE 6. NAFAN pop-up survey users' material preference. Note: Totals do not sum to 100%. Users could select more than one material type preference. Material categories in this chart include those provided to users and write-in answers.

More than half of users stated that they do not have strong preferences for one material type over the other. Any material that is relevant to their research topic, regardless of material type, ranked highest at 55.8% (see figure 6). Analysis for material preference by subgroup shows that no single group is driving this answer.

NAFAN Pop-Up Survey Users' Material Preference by Top Five Professions

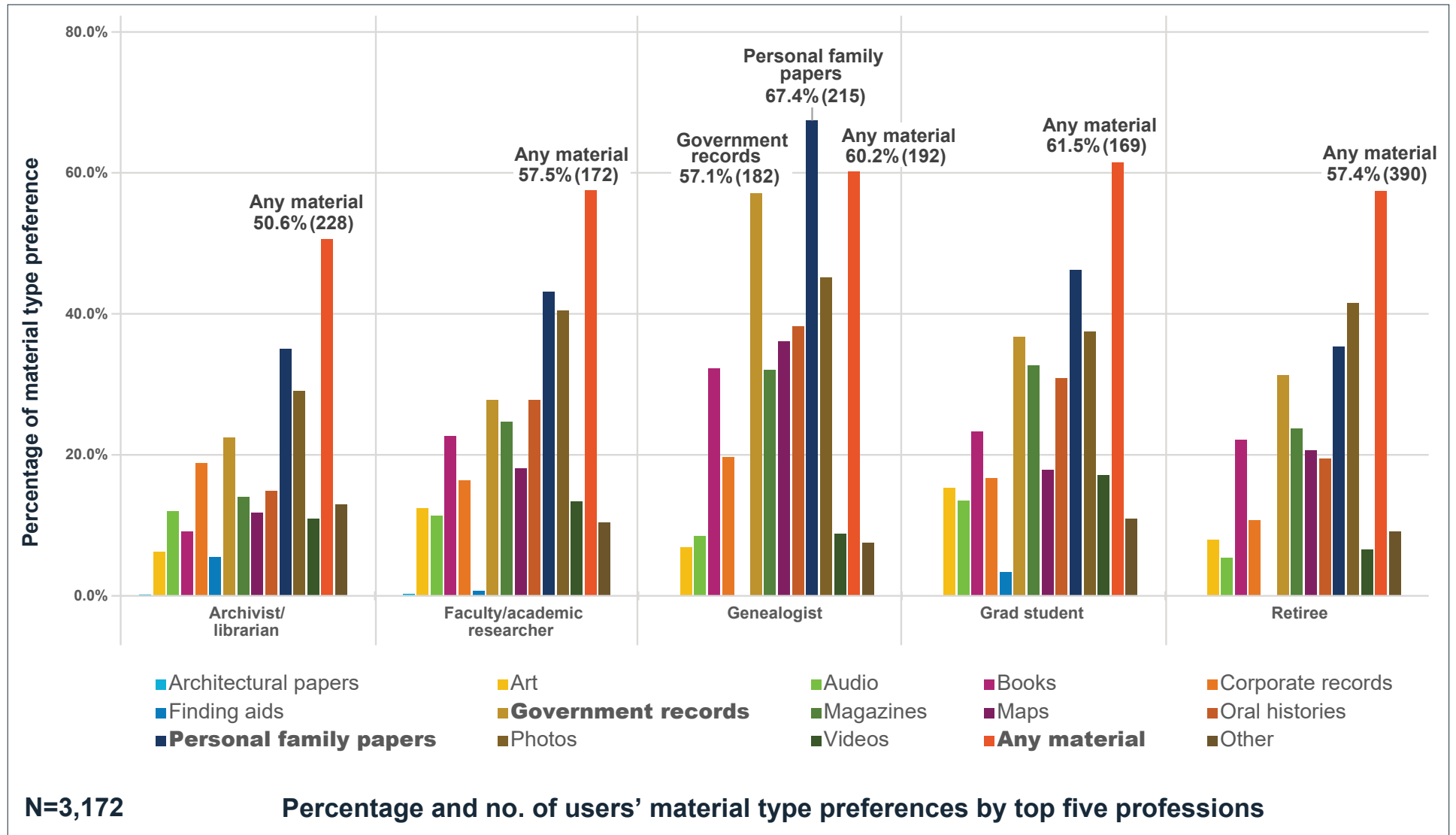


FIGURE 7. NAFAN pop-up survey users' material preference by top five professions. Note: Totals do not sum to 100%. Users could select more than one material type preference. Material categories in this chart include those provided to users and write-in answers.

Retirees, faculty and academic researchers, graduate students, and archivists and librarians (the top five professions) noted that any material is their preference at 50% and higher. Genealogists want personal family papers slightly more (67.2%) than any material related to their topic (60.2%). Photos (39.1%), personal family papers (37.2%), government records (31.1%), and magazines (26.0%) round out the top choices for material preference (see figure 7). For detailed statistics see [appendix B](#).

NAFAN Pop-Up Survey Users' Preference for Online or In-Person Materials

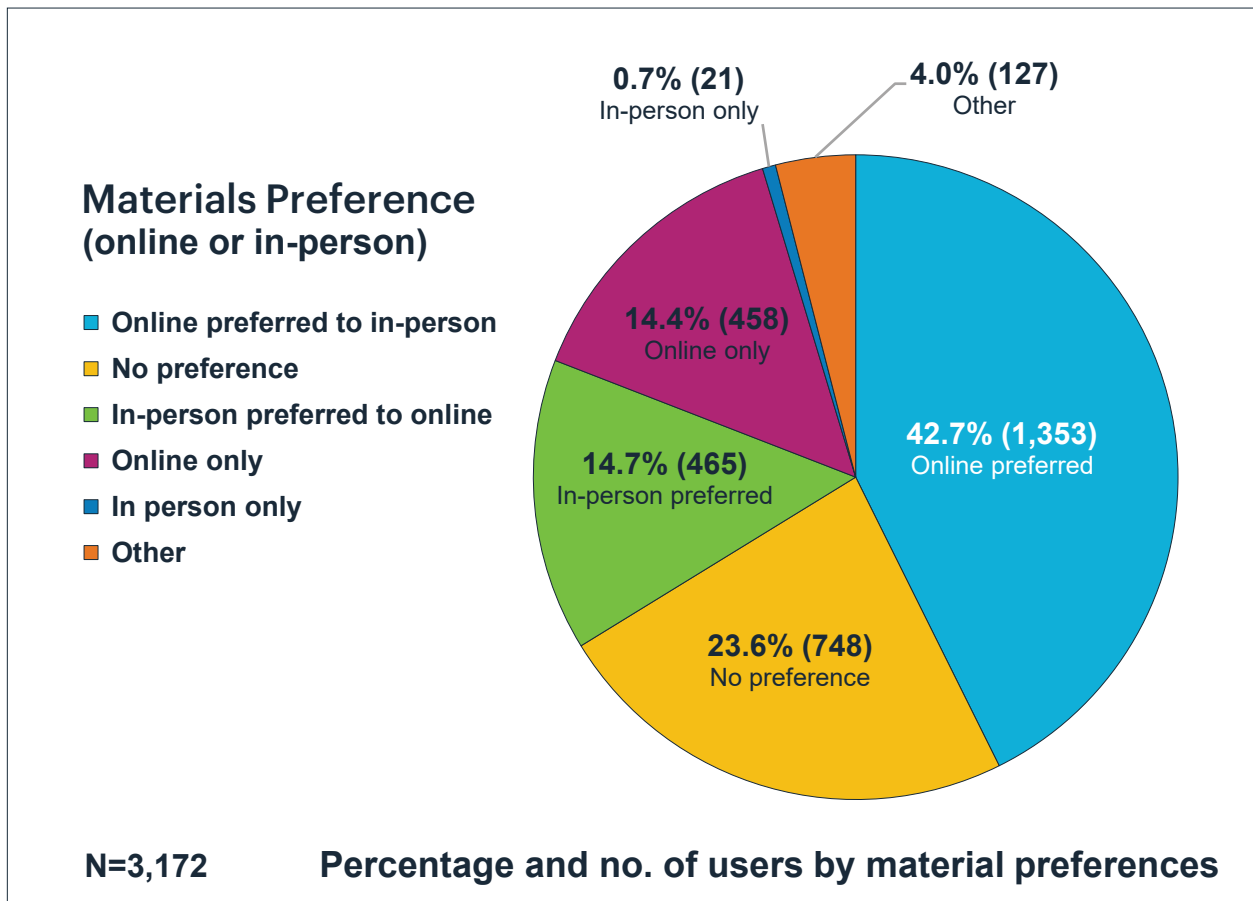


FIGURE 8. NAFAN pop-up survey users' preference for online or in-person materials.

In a follow-up question about archival materials, the survey asked how users preferred to access materials prior to the COVID-19 pandemic to gauge their interest in seeking online and digitized materials. Some archival materials are digitized, though by and large, only a small portion of archival material is digitized and available online. Nearly half of respondents (42.7%) indicated that they preferred online materials but were willing to use in-person materials. Roughly a quarter of the respondents (23.6%) indicated they had no preference between online or in-person materials. Fourteen percent of respondents stated a strong preference for online only (14.4%) or prefer in-person to online access (14.7%). See figure 8.

Table 2 compares material access preferences by age group. Interestingly, all age groups prefer accessing archival material online but are willing to use materials in person (second row). Across age groups, the next type of preferred access is no preference between online and in person (fifth row). Several write-in responses to "Other" indicated that distance plays a role in whether a user prefers online or in person, with in-person access preferred for local archives and online access for archives further away. Respondents also stated that online access is their preferred method in their initial research, which can help them determine if going in person is worth the trip. Still other respondents prefer to have the guidance of reference archivists when getting help, be that online or in person.

TABLE 2. NAFAN pop-up survey users' preference for online or in-person materials by age group.

Access preference	18 yrs	19–25 yrs	26–34 yrs	35–44 yrs	45–54 yrs	55–64 yrs	65+ yrs
I only am interested in materials I can access online	22.2% N=4	13.4% N=27	9.2% N=27	7.9% N=27	12.6% N=59	13.6% N=98	19.2% N=211
I primarily am interested in materials I can access online , but am willing to use materials in person	38.9% N=7	38.9% N=7	38.1% N=77	37.8% N=129	40.3% N=188	44.9% N=324	47.1% N=518
I only am interested in using materials in person	5.6% N=1	1.0% N=2	0.7% N=2	0.3% N=1	0.6% N=3	0.8% N=6	0.4% N=4
I primarily am interested in materials I can access in person , but am willing to use materials online	16.7% N=3	17.8% N=36	25.9% N=76	21.1% N=72	15.8% N=74	12.3% N=89	10.0% N=110
I do not have a preference between online and in-person access to materials	16.7% N=3	28.2% N=57	24.8% N=73	28.7% N=98	26.8% N=125	23.3% N=168	19.8% N=218
Other	0.0% N=0	0.01% N=3	0.04% N=11	0.04% N=14	0.04% N=18	0.05% N=36	0.04% N=39

HOW DO AGGREGATION USERS SEARCH?

The pop-up survey asked a series of questions about search behavior to identify the resources that users typically employ when they are doing research for their projects. A little less than half indicated that they found the archival aggregation website through a browser search (44%). Roughly 20% indicated that they have used the aggregation site before or that they followed a link on a website or social media (see figure 9).

How NAFAN Pop-Up Survey Users Found Archival Aggregation Websites

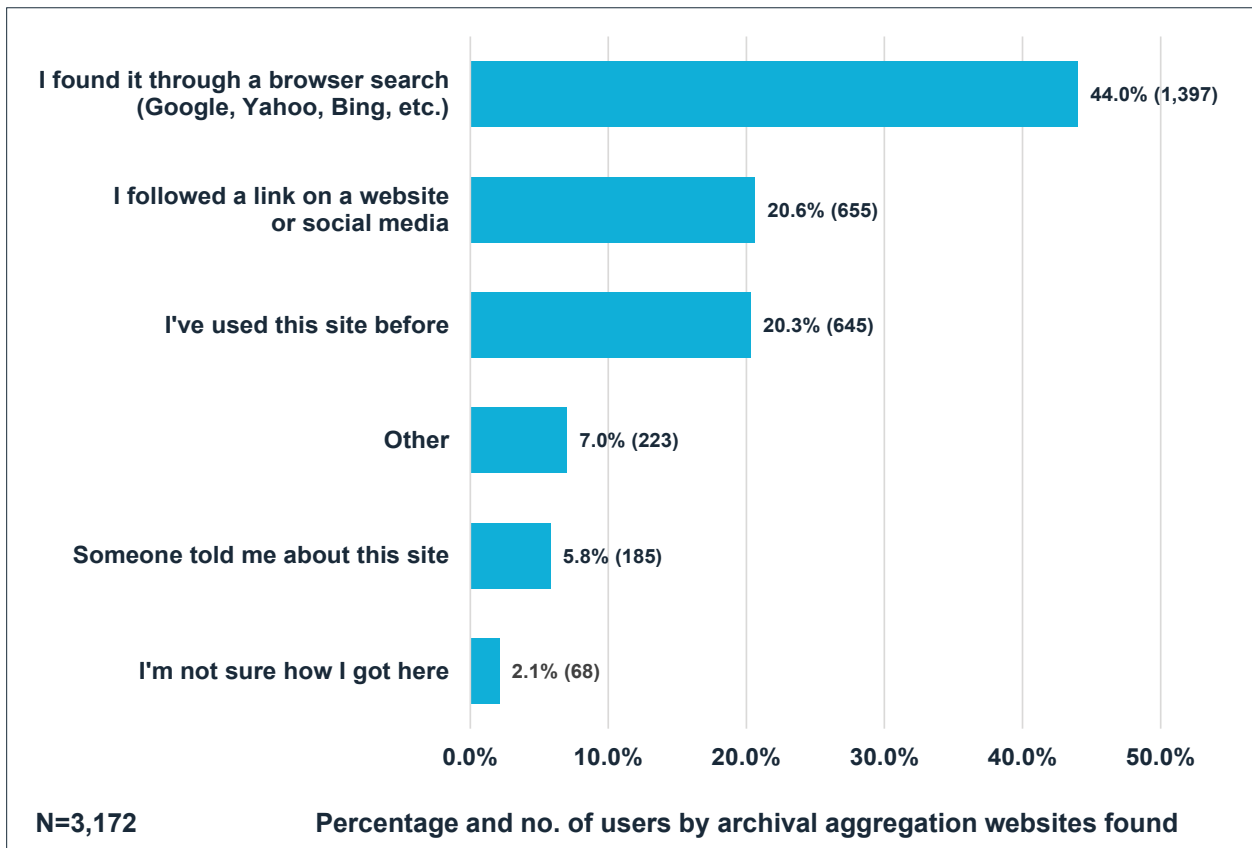


FIGURE 9. How NAFAN pop-up survey users found archival aggregation websites.

Users also were asked if they searched elsewhere before coming to the archival aggregation site. Fifty-eight percent stated that they did. Among those respondents, the majority (62.2%) stated that they started with a search engine. Figure 10 shows that more than half of the users (54.4%) searched an individual archives website. Some users reported visiting a university library website (24.4%), a genealogy website (29.4%), and Wikipedia (21.1%). This suggests that archival aggregators complement other available information online.

NAFAN Pop-Up Survey Users' Other Research Resources

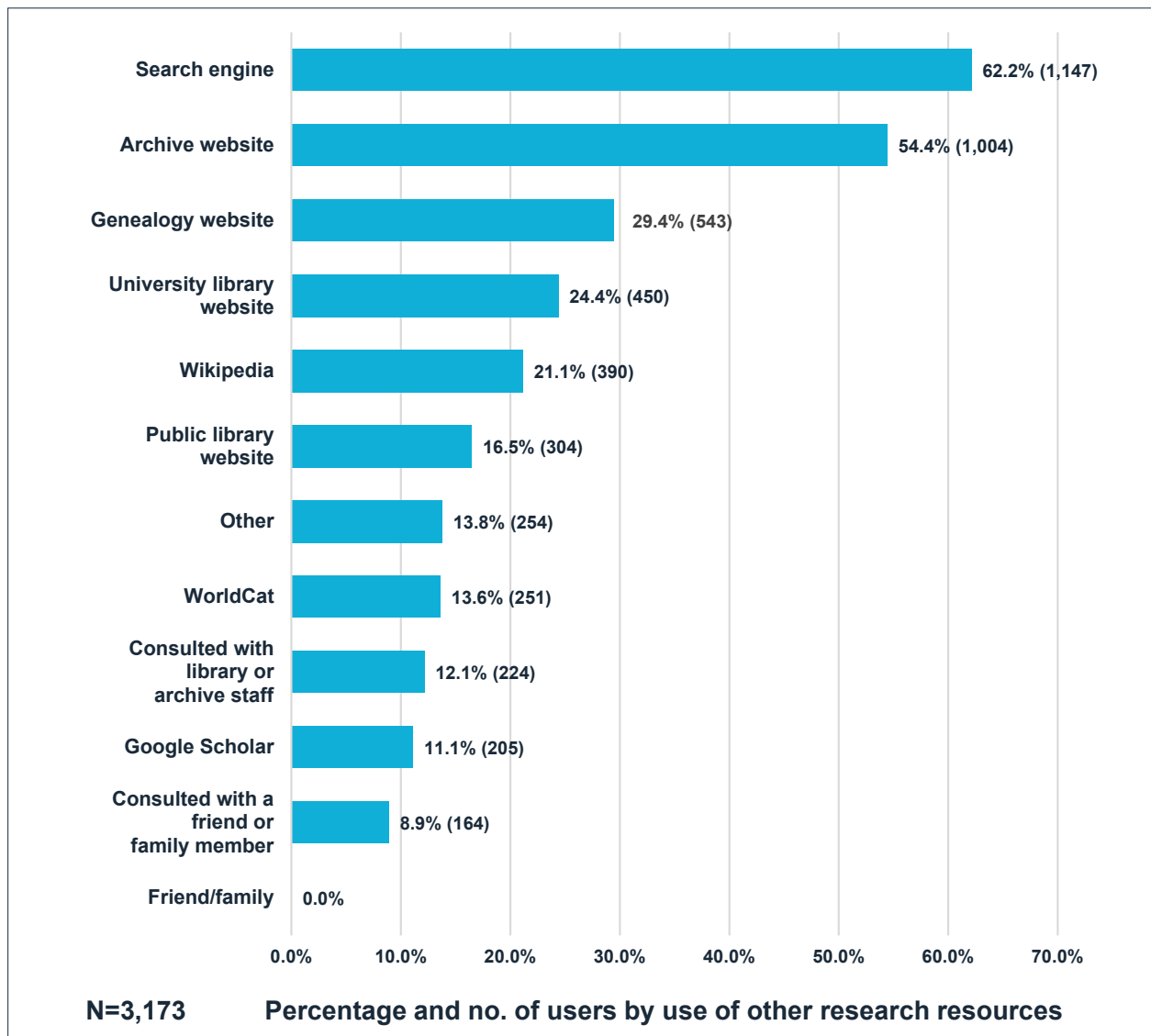


FIGURE 10. NAFAN pop-up survey users' other research resources. Note: Totals do not sum to 100%.

Deeper analysis identifies where subgroups of users are searching in addition to archival aggregators. Fifty-five percent of genealogists reported that they do search genealogy websites in addition to archival aggregators, along with archive websites (43.9%) and search engines (43.3%). Faculty and academic researchers reported archive websites as one of their top sources besides archival aggregators (31.1%), as well as using search engines (23.1%) and university library websites (23.1%).

Retirees, by contrast, reported search engines as their top source at 38.2%, followed by archive websites at 29.1% and then genealogy websites at 21.8%. Research at genealogy websites is unsurprising since 37.9% of retirees stated that their project purpose was family history.

Both graduate students and archivists and librarians reported that archive websites barely edge out search engines for their research projects. Archival website use by graduate students was 23.3% compared to 23.1% for search engines. For archivists and librarians, archival website use was 29.8% compared to 29.5% for search engines.

With several online sources being consulted by aggregator users, it is surprising to learn that 55.4% of respondents indicated that completing the survey was their first visit to that aggregation website (see figure 11). A very small percentage (2.8%) reported using the archival aggregator website daily, with more frequent users reporting using the website less than monthly (16.3%) or monthly (12.1%).

NAFAN Pop-Up Survey Users' Frequency of Visits to Archival Aggregation Website

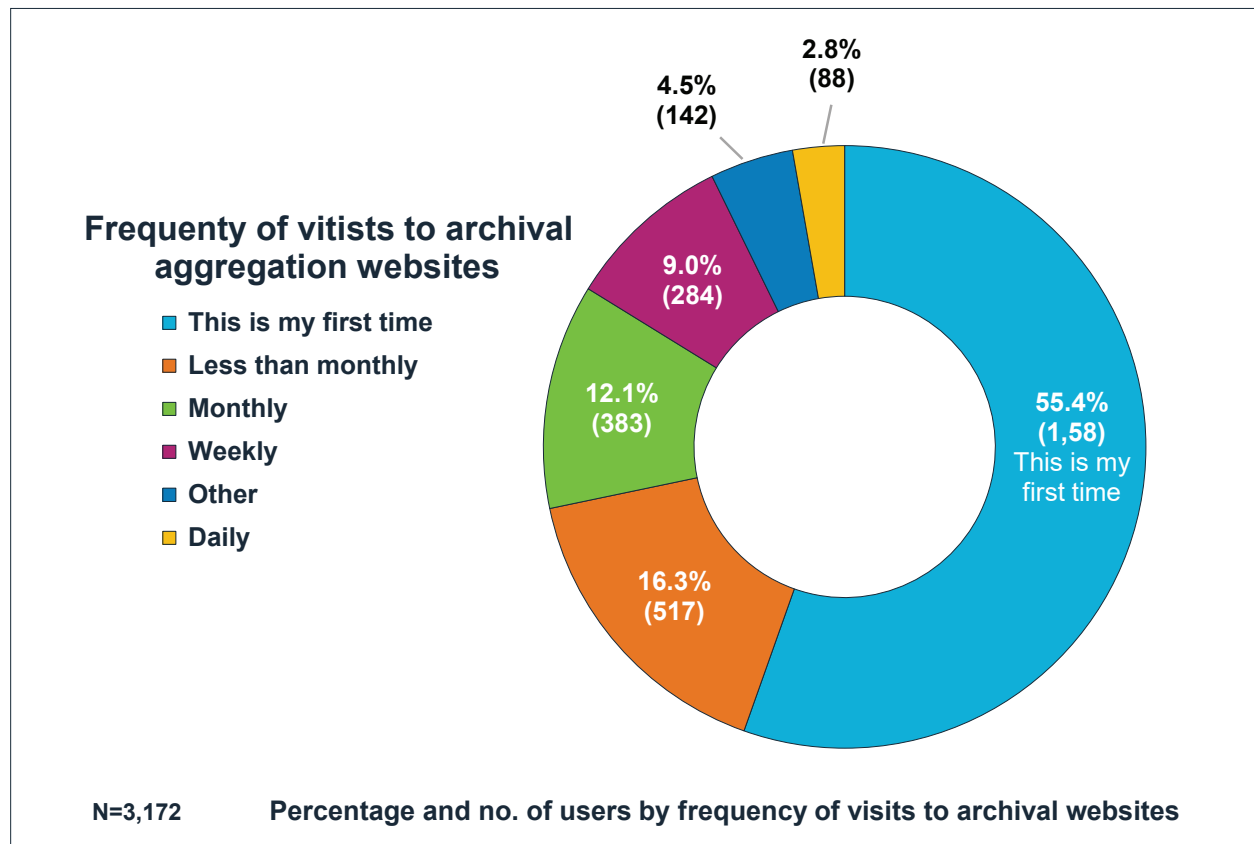


FIGURE 11. NAFAN pop-up survey users' frequency of visits to archival aggregation website.

Both retirees and genealogists reported high percentages for first-time use of the archival aggregation site where they completed the survey. Seventy-four percent of retirees and 61.8% of genealogists report never having used the aggregator site before. The limitation of this question does not provide additional context about whether users are familiar and visit other aggregator websites, and instead asks them about the aggregator website where they completed the survey (figure 11).

Faculty and academic researchers and graduate students reported roughly similar percentages of aggregator use. Forty percent of faculty reported using the site for the first time and 46.5% of graduate students reported using the aggregator for the first time. Less than monthly was the next highest rate of use at 26.4% for faculty and 19.6% for graduate students. Graduate students next use archival aggregators weekly (15.6%), compared to faculty that report monthly use (17.1%) over weekly (8.0%).

Archivists and librarians' use of archival aggregator websites is relatively evenly distributed in their frequency ranging from 15% to 22% across all categories. They reported higher frequency of use than any other profession, including higher daily (15.5%), weekly (22.0%), and monthly (22.0%) use than all other professions (see figure 12). This indicates that information professionals are the most consistent users of archival aggregators, even with roughly 19% of archivist and librarian respondents reporting that they came to an archival aggregator for the first time when they completed the survey.

Less than monthly is the second highest frequency of archival aggregation use reported by all professions except archivists. This is interesting given the high unfamiliarity among retirees and genealogists, and varying degrees of use by archivists and librarians, graduate students, and faculty and academic researchers.

NAFAN Pop-Up Survey Users' Frequency of Visits to Archival Aggregation Website by Top Five Professions

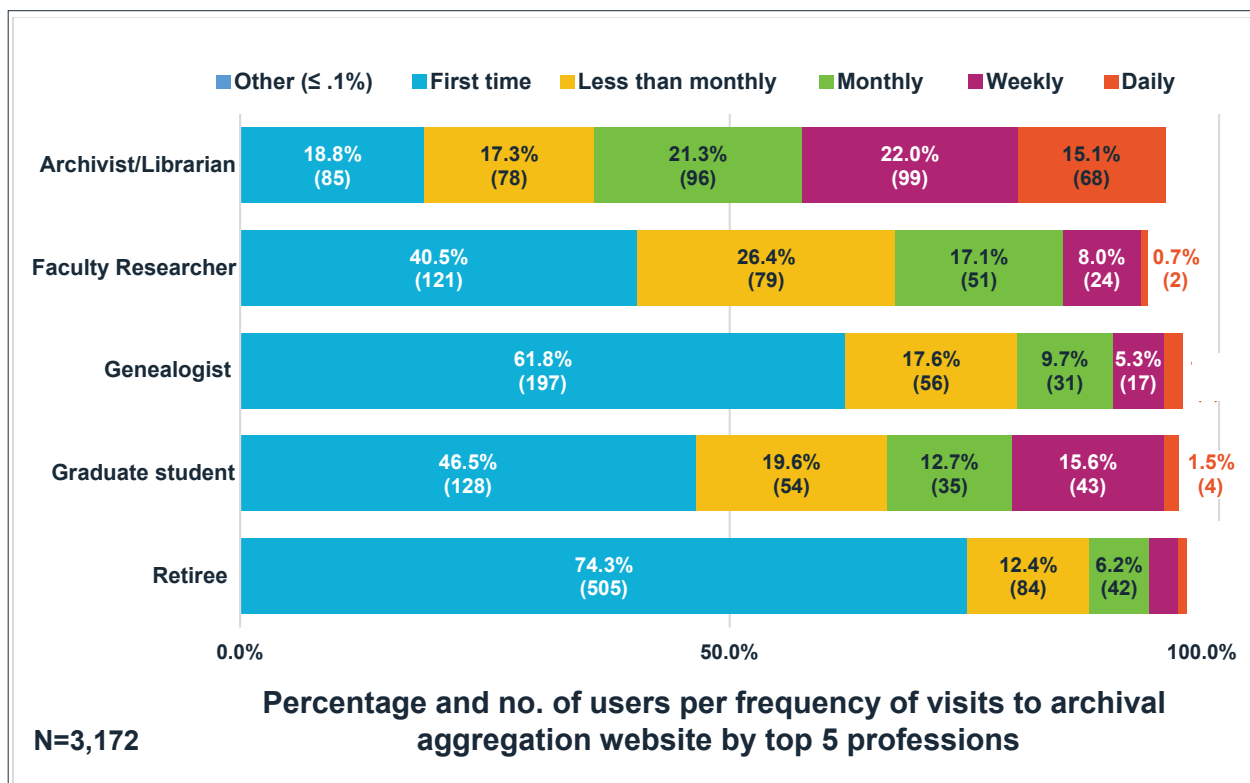


FIGURE 12. NAFAN pop-up survey users' frequency of visits to archival aggregation website by top five professions.

Comparing current user types

Personae studies in recent years aim to describe the users of specific online archival discovery systems and seek to explore and identify the information needs or information-seeking behavior of current and potential users.

This section focuses on deeper analysis that compares users in the survey to identify similarities and differences between subgroups. In the literature section, it is noted that it is unknown whether users that pursue archival materials in person differ from users that seek archival materials online. Therefore, the following discussion focuses only on the results from the survey of online archival aggregation users and is not generalizable to users of archival materials. The personae that are specific to Project Electron, ArcLight, and ArchivesSpace describe the information-seeking behaviors of online users of archival discovery systems by profession and by the information need. To identify comparisons or differences, the NAFAN team selected the pop-up findings from the categories of profession, project purpose, and research resources for the following discussion, as they overlap with content from the personae studies. In some cases, there is not adequate detail about the methods of the personae studies for the NAFAN team to use for strict comparison to the pop-up findings.

PROFESSION

Knowing that profession has been an important demographic for prior archival user studies, this section's analysis begins by reflecting on the professions of users. Figure 1 signals that there are several users currently understudied in the literature, specifically users that represent professions not associated directly with library and information organizations (i.e., libraries, archives, and museums) or higher education. Understudied professionals, such as journalists, writers, independent researchers, lawyers, and engineers also are searching on archival aggregators for archival collections, but at lower rates.

As described in the literature review, personae studies have included users more closely associated with libraries or archives or higher education with two exceptions. One persona from the ArchivesSpace—the “Doing their job researcher”—includes professions such as public relations, photo editor at a publisher, and engineer.³² These professions are grouped together into a single type with various information-seeking behavior, and not all of their information needs are identified. ArchivesSpace has identified these professionals as doing work for their job and also for personal interest. In having both project purposes, “Doing their job researchers” could be very similar to NAFAN respondents. The Rockefeller Archive Center for Project Electron personae includes a profession for a documentary filmmaker doing research. The filmmaker persona in Project Electron is seeking information at archives, specifically, archival footage, and therefore is similar to professions identified in the NAFAN pop-up survey. Unfortunately, there is not comparable data about the information-seeking behaviors of the filmmaker to the NAFAN respondents. Documentary filmmakers, as a subgroup, have been studied as recently as 2018.³³ It is hard to know whether the understudied professions reported by 28.3% of NAFAN respondents compare to other personae that are variously labeled enthusiasts, genealogists, community researchers, hobbyists, and personal interest researchers.

Retirees are also a large portion of understudied respondents to the NAFAN survey. It could be that enthusiast and hobbyist personae from other studies are more similar to retirees than professionals. Together, retirees (21.4%) with journalists, writers, lawyers, and other understudied professions (28.3%) comprise roughly 50% of NAFAN respondents. The next line of inquiry is to

determine if users from understudied professions are demonstrably different from users such as faculty researchers and archivists based on search behavior and information need. In deeper analysis looking at the top five professions in Figure 1—archivists and librarians, faculty/academic researchers, graduate students, genealogists, and retirees—the team began to unpack whether there were observed differences in users’ project purpose and research resources. The following analysis compares retirees to other top professions, as it is the only sizeable subgroup of NAFAN survey respondents that have been understudied.

PROJECT PURPOSE AND RESEARCH RESOURCES

Related to profession is the project purpose motivating users to perform their research and determine whether archival resources are central to their project. Genealogists stand out in table 1 on project purpose for selecting family history at nearly 90%, which drives them also to seek personal family papers at 67.4%, more than any other materials held in collections as they noted as their top material preference (figure 7). Retirees, a group consisting of people with myriad backgrounds, indicated that they are former academic administrators, librarians, and engineers, among other professions. They selected personal interest as their primary project purpose at a higher rate at 48.8% (N=332) than all other subgroups, including genealogists. Their second highest project purpose is family history research at 37.9% (N=258) and local history at 21.6% (N=147). Retirees are similar to archivists, faculty researchers and graduate students in regard to material preference, acknowledging that they most want any material related to their project.

When users described their other research resources included in figure 10, all of the top five professions selected archives websites and search engines above all other response options and at nearly equal rates, except genealogists:

- **Archivists and librarians** go to archives websites at 23.3% (N=105) and search engines at 23.1% (N=104)
- **Faculty** go to archives websites at 31.1% (N=93) and search engines at 29.8% (N=89)
- **Graduate students** go to archives websites at 29.8% (N=82) and search engines at 29.5% (N=81)
- **Retirees** go to archives websites at 29.1% (N=198) and search engines at 38.2% (N=260)
- **Genealogists** go to archives websites at 43.9% (N=42) and search engines at 43.3% (N=138)

For genealogists, genealogy websites edge out archives’ websites and search engines at 55.5% (N=177), which echoes genealogists’ focused search on family history as depicted in table 1, and personal family papers as shown in figure 7.

There are two information-seeking behaviors where archivist and librarian pop-up survey respondents are distinct from other professions: how the user found the archival aggregation website (figure 9) and frequency of use (figure 12). For how the user found the archival aggregation website, the majority of users indicated that they found it through a web browser, and this is true for faculty (40.5%, N=121), graduate students (33.8%, N=93), genealogists (48.0%, N=153), and retirees (54.6%, N=371). By comparison, archivists and librarians report finding aggregation websites via web

browser at 19.3% (N=87). At 53.7% (N=242), archivists and librarians are the only profession to report that they have used the archival aggregation website before. Of the top five professions, archivists and librarians also are the exception for their more frequent visits to archival aggregation websites. More than 40% of faculty researchers, graduate students, genealogists, and retirees were first-time users at the time they completed the survey (see figure 12).

Three-quarters (78.1%) of NAFAN pop-up survey respondents have higher education degrees ranging from bachelor's degrees to doctorates. The majority of archivists and librarians hold a master's degree (78.5%) and, similarly, all faculty and academic researchers hold doctoral degrees (71.6%). Half (56.0%) of graduate students hold a master's degree. Genealogists are spread across the education landscape with 16.0% holding an associate degree, 35.1% holding bachelor's degrees, and 22.6% holding master's degrees. Retirees, as well, range from 11.0% holding an associate degree, 32.1% holding bachelor's degrees, 25.0% holding master's degrees, and 15.6% holding doctorates.

CLUSTER ANALYSIS

These comparisons between user types suggest that genealogists and archivists and librarians are two subgroups that demonstrate distinct information-seeking behavior. To further explore the cohesion between the NAFAN survey respondents, a Two-Step cluster analysis was conducted. Cluster analysis groups respondents based on how similar they are on a specified set of variables. The clustering algorithm divided the respondents into different clusters, where people within a cluster are more similar to each other than they are to people outside of the cluster. This section discusses a review of statistics within each cluster that described each cluster's commonalities. After reviewing and revising the model, the NAFAN team assigned each cluster a number so each respondent to the pop-up survey was assigned a cluster number.

Most cluster analysis techniques are meant for continuous variables (e.g., age). However, many of the variables in the NAFAN survey are categorical in nature (e.g., profession). A Two-Step clustering technique permits all categorical variables in the model. Two-Step clustering preprocesses the data to determine the number of clusters before performing a hierarchical clustering analysis.³⁴ Using a log-likelihood distance measure, the Two-Step function in SPSS determined it was optimal to divide users into five clusters. The silhouette measure of cohesion is estimated at 0.3 on a scale -0.1 to 1.0. The bottom of the scale indicates that the model does not fit the data very well, with the opposite holding true. A model is a fair representation of the data at 0.5. The NAFAN Two-Step cluster analysis is a fairly good fit to the data at 0.3.

The predictor variables that separated users into clusters are:

- Purpose for the search/inquiry
- Level of preference for online material (vs. physical material)
- Profession
- Highest degree earned

Family history, personal interest, local history, and professional project pulled users closer together during clustering. Similarly, education, specifically a doctorate, pulled faculty researchers together. The five clusters resulting from the analysis are:

- Archivists, librarians, and other professionals
- Faculty and other doctoral degrees

- Undergraduate and graduate students
- Family history researchers
- Personal interest researchers

The cluster analysis results mirror the top five professions that guided much of the analysis bolstering this pop-up survey and others that use profession as a central factor in determining how users are similar to one another. Although retirees disappear, they are replaced by researchers that selected personal interest as their project purpose. This cluster includes many retirees (40.6% of this cluster are 65 years or older and 37.0% are retired professionally), but also pulls together other lifelong learners (11.5%) and professionals, such as lawyers and engineers (8.4%). Genealogists, or family history researchers, have a strong identity in the cluster analysis as well.

Archivists and librarians account for 51.0% of the archivists and other professionals cluster while journalists/writers (7.2%) and professionals (i.e., lawyers) (10.6%) in total represent 17.8% of the cluster. Archivists and librarians are also strongly represented in the cluster with undergraduate and graduate students at 15.4%. In fact, after graduate students (31.7%), they are the next highest profession in the graduate student cluster. Both of these clusters also show the highest percentages for users holding master's degrees; 75.3% of respondents in the archivist cluster hold a master's degree and 45.6% of the graduate student cluster hold master's degrees. The primary difference between the archivist and graduate student clusters is their information-seeking behavior, with respondents in the archivist cluster indicating that they had used an archival aggregation website before at 46.7% compared to 20.9% of the graduate student cluster having used an archival aggregation website before. In all other clusters, archivists and librarians represent less than 10% of respondents.

Discussion and Recommendations

NAFAN pop-up survey findings point to specific areas of needed attention for the NAFAN project and for the future NAFAN platform. In this section, findings are followed by specific recommendations for follow-up that are supported by the findings from this survey.

1) User testing is needed for all user types

These findings indicate that archival aggregators are visited by multiple types of researchers for their projects. Previous archival user studies have provided useful information on the needs of some of these researchers like academic faculty and genealogists but offer little insight into the research habits of users in professions such as law, journalism, or lifelong learners. If the NAFAN platform is to be built for a broad reach to many users, it should consider their disparate needs and may require additional research into the similarities or dissimilarities between user types.

Similarly, the survey's findings indicate great variety in the frequency with which users visit archival aggregators. With the high percentage of users coming to archival aggregators for the first time (55.4%) or visiting less than monthly (16.3%), NAFAN should aim to address the needs of first-time

and less frequent users who may need support in understanding and using the system. Users also indicated anecdotally that assistance from archivists and librarians in helping with their search is highly valued, pointing to the need for assistance navigating archival aggregators and collections.

Archivists and librarians are one group of users whom our results show visit frequently and repeatedly, and they may be assumed by some to be expert users. However, their needs are not well understood through archival user studies, though they are present in personae studies, such as Stanford Libraries' ArcLight archival discovery platform and Rockefeller Archive Center for Project Electron.³⁵ Allison-Bunnell's report in 2019 does not indicate whether extant archival aggregators consider this subgroup a core user group or do testing with them to improve the functionality of the platform; the list provided to aggregators of user subgroups at that time does not include information professionals.³⁶ NAFAN should include archivists among their test users to ensure that archivists find the platform easy to navigate for themselves and in service of their user communities.

Recommendations:

- Further research and user testing for the NAFAN platform should include the broad array of user types identified through the survey and represent different frequencies of use.
- The design and functionality of the NAFAN platform should consider the needs of first-time and less frequent users of archival aggregation who may need support in understanding and using the interface. Although these users may only visit the archival aggregation site one time, they are a high percentage of overall users of the site.
- Archivists, librarians, and other information professionals frequently use archives themselves and help researchers use them. Therefore, the front-end user needs of information professionals should be considered when building and testing platform functionality.

2) NAFAN should consider its position within an ecosystem of research sources

Our results indicate that researchers using archival aggregators are also using a wide variety of other tools to find and access archival material. The NAFAN project should consider its position in this ecosystem of research resources with regard to how it impacts user expectations and needs and indicates the potential need for certain system functionality.

A high percentage of users discover archival aggregation websites from search engines (44.0%). This indicates that search engines are an important driver of traffic to archival aggregations, and search engine indexing and optimization should be a part of the NAFAN program.

Similarly, 20% of NAFAN pop-up survey users reported they found the archival aggregator by following a link on a website or social media (20.6%). Both search engines and links from other websites could drop a user into the NAFAN system at a variety of pages, many of which would not offer the context setting of a home page or main search page. It will be important to consider this user journey in design and usability work. Only 20.3% of users reported they visited the aggregation site during prior research, which further indicates that many users will likely be unfamiliar with the aggregation interface and will need good design to support their comprehension and use of the system.

Findings from figure 10 indicated that, in addition to archival aggregators, users are employing archive websites (54.4%), genealogy websites (29.4%), university library websites (24.4%), Wikipedia (21.1%), public library websites (16.5%), and WorldCat (13.6%) in their research journey. This could indicate that the user journey for any project necessitates searching several sites in order to locate material relevant to their project. This is an opportunity where NAFAN can meet the needs of archival users through collocating descriptions of archival collections held in many archives and currently represented across many different websites, and by helping users understand the connections between related collections held at different institutions. This would enhance the value of NAFAN as a national one-stop platform for archival materials.

Recommendations:

- Because many users enter through search engine results, effort should be expended on search engine optimization and indexing of content within NAFAN.
- System design and user testing should allocate resources to support users in understanding the NAFAN interfaces they may land on from browser searches or other websites.
- Support broad participation from as many archives as possible in order to save the time of researchers by lessening the number of resources they need to search in order to find material relevant to their research project.
- Build functionality that helps the user see similarities or connections across collections held at different institutions.

3) NAFAN Should Support Access as Well as Discovery

While the NAFAN platform will primarily serve as a discovery tool, it should also consider how it can support users in accessing archival collections.

Users are interested in accessing digital or digitized archival content online. Forty-two percent (42.7%) of users prefer online over in-person access to archival collections and 14.4% are interested only in materials they can access online. An additional 23.6% of users have no preference between online and in-person access, indicating a willingness if not a preference for online access. In an ecosystem that includes Ancestry and FamilySearch, which together hold millions of vital records from across the country, as well as other academic library websites that digitize popular content in high resolution such as the British Library, users have access to digitized archival materials at their fingertips. NAFAN will have to compete in this landscape to draw in users and meet their needs for access.

Pop-up survey respondents indicate that users start with online research before venturing to archives in person. NAFAN should support easy access to information that helps individuals contact and plan a research trip to an archive for the 14.7% of users that prefer in-person access, as well as the 42.7% who prefer online access but are also willing to use archives in person, and the 23.6% of users with no access preference.

Recommendations:

- NAFAN should carefully consider how digitized content will be identified on the platform. While only a small portion of the archival material represented in a national aggregation is likely to be digitized, that portion should be easy for users to identify through search, filtering, faceting, or other tools.

- NAFAN should carefully consider how access to digitized content is or is not integrated into the platform, including if certain standards or viewing tools could be supported. If all access to digital content occurs outside of the NAFAN platform, the user journey to link to that content should be considered.
- NAFAN should support users in taking the necessary steps to access archival materials after a user discovers them on the platform, including making clear who the holding institution is and how to contact them.

CONCLUSION

The NAFAN pop-up survey is the first of its kind to gather information directly from users across the archival aggregation landscape and provide insights about users' information-seeking behavior, information need, and demographics. The findings reveal that online users of archival aggregation websites come from a wide variety of professions and locations and represent a broad range of researchers. As online users, many respondents indicated they preferred digitized collections and visit other trusted online sources in their work. They lack familiarity with archival aggregations, even in performing most of their research online. The findings from this survey provide concrete evidence that users could benefit from a centralized, trusted source for digital archival collections and descriptions that helps focus their research journey.

APPENDIX A: SURVEY QUESTIONNAIRE

Pop-up invite

Help us make historical materials more accessible

Complete our brief survey and enter to win a \$100 gift card in the process.

NAFAN survey

(Questions marked with an asterisk (*) are required.)

- * 1. Are you interested in responding to a short survey? You must be 18+ years of age and reside in the U.S. to participate.**

You can help archives and libraries make historical materials more accessible and be entered to win a \$100 Amazon gift card in the process! A team of researchers at OCLC, Inc., the California Digital Library, and University of Virginia Library would like to invite you to participate in an online survey as part of the IMLS-funded project (LG-246349-OLS-20), “Building a National Archival Finding Aid Network” (NAFAN). This survey is an opportunity for you to share your knowledge and experiences and strategies when searching for historical materials.

Participation in the study is not required in order to participate in the raffle. To enter the raffle alone, please email Lesley Langa, Associate Researcher, OCLC, Inc. at langal@oclc.org.

(Mark only one.)

- Yes
- No

- * 2. A team of researchers at OCLC Research, a non-profit serving the library community, California Digital Library, and University of Virginia Library would like to invite you to participate in an online survey as part of the IMLS-funded project (LG-246349-OLS-20), Building a National Archival Finding Aid Network (NAFAN). This is an opportunity for you to share your knowledge and experiences with findings aids and searching for archival material.**

Confidentiality

You will not be identified by name in any reports or publications on this study, and care will be taken to not include any potentially identifying information. All research records will be kept confidential to the extent provided by federal, state, and local laws. Data from the study will be kept in a secure location. A copy of this document is available for your records and one copy will be kept with the research records. SurveyMonkey will not capture electronically identifiable data, such as IP address or cookies, about you during the completion of the survey. Your participation in this study involves no more than minimal risks or discomforts.

Consent

The survey will take approximately 10 minutes to complete, and the data will be captured by SurveyMonkey. Completed surveys will be entered into a raffle to receive a \$100 Amazon gift card. Your responses are used solely for analysis.

Your participation in this study is voluntary. After you consent, you still may refuse to answer specific questions, withdraw from the study at any time, or ask that information be removed from our dataset. You also may ask questions concerning the study before, during, or after the study.

Participation in the study is not required in order to participate in the raffle.

Questions

If you have questions about this research, contact Lesley Langa, Associate Researcher, OCLC, Inc., 6565 Kilgour Place, Dublin, OH, 43017-3395. Email: langal@oclc.org

UCLA Office of the Human Research Protection Program (OHRPP):

If you have questions about your rights as a research subject, or you have concerns or suggestions and you want to talk to someone other than the researchers, you may contact the UCLA OHRPP by phone: (310) 206-2040; by email: participants@research.ucla.edu or by mail: Box 951406, Los Angeles, CA 90095-1406.

Do you consent to participate in the study?

(Mark only one.)

- Yes
- No

* 3. Please confirm that you are 18+ years of age to participate in the Building the Foundation for a National Archival Finding Aid Network (NAFAN) Project

(Mark only one.)

- I am 18 years old or older.
- I am under 18 years of age.

* 4. Are you currently a resident of the United States of America?

(Mark only one.)

- I am a resident of the United States of America
- I am not a resident of the United States of America

* 5. How did you get to this web site?

(Mark only one.)

- I found it through a browser search (Google, Yahoo, Bing, etc.)
- I followed a link on a website or social media
- Someone told me about this site
- I've used this site before
- I'm not sure how I got here
- Other (please specify)

*** 6. What project or type of research prompted you to visit this site today?**

(Select all that apply.)

- Class Assignment
- Creative or Artistic Project
- Family History Research
- Local History Research
- Long-term Project (book, documentary, exhibition, anything with a timeframe in months or years)
- Material to Use for Teaching
- Personal Interest
- Professional Project
- Short-term Project (news article, television project, anything with a timeframe in days or weeks)
- Thesis or Dissertation
- Other (please specify)

*** 7. How frequently do you visit this site?**

(Mark only one.)

- This is my first time
- Daily
- Weekly
- Monthly
- Less than monthly
- Other (please specify)

*** 8. Did you try your search somewhere else before you came to this site?**

(Mark only one.)

- Yes
- No

*** 9. If yes, where did you search?**

(Select all that apply.)

- Archive websites (i.e., Library of Congress, National Archives, Historical Societies, etc.)
- Consulted with a friend or family member
- Consulted with library or archive staff
- Genealogy websites (i.e., Ancestry.com, FamilySearch.com, etc.)
- Google Scholar
- Public Library website
- Search engine (e.g., Google, Bing, Yahoo)
- University Library website

- Wikipedia
- WorldCat
- Other (please specify)

*** 10. What type(s) of archival material are you looking for?**

(Select all that apply.)

- Artworks
- Audio Recordings
- Books
- Corporate Records (Records created and originally kept by a business or nonprofit entity.)
- Government Records (Records created and originally kept by a local, state or federal entity.)
- Magazines/Periodicals/Newspapers
- Maps
- Oral Histories
- Personal/Family Papers (Records created and originally kept by an individual or family.)
- Photographs
- Videos/Film
- Any material relevant to my topic, material type does not matter
- Other (please specify)

*** 11. Has the COVID-19 pandemic impacted if or how you access archival materials?**

(Mark only one.)

- Yes
- No

*** 12. During the COVID-19 pandemic, what is your preference for accessing archival materials?**

(Mark only one.)

- I only am interested materials I can access online
- I primarily am interested in materials I can access online, but am willing to use materials in person
- I only am interested in using materials in person
- I primarily am interested in materials I can access in person, but am willing to use materials online
- I do not have a preference between online and in-person access to materials
- Other (please specify)

*** 13. Please choose which scenario best describes how you preferred to access archival materials prior to the COVID-19 pandemic.**

(Mark only one.)

- I only am interested materials I can access online
- I primarily am interested in materials I can access online, but am willing to use materials in person
- I only am interested in using materials in person
- I primarily am interested in materials I can access in person, but am willing to use materials online
- I do not have a preference between online and in-person access to materials
- Other (please specify)

*** 14. Which of the following best describes your academic status or profession?**

(Mark only one.)

- Archivist/Librarian
- Artist/Filmmaker
- Faculty/Academic Researcher
- Genealogist
- Graduate/Postgraduate Student
- Journalist
- K-12 Teacher
- Museum Professional
- Retiree
- Undergraduate Student
- Other (please specify)

*** 15. What is your highest level of education?**

(Mark only one.)

- High School Diploma/G.E.D.
- Two-year/Associate's Degree
- Undergraduate/Bachelor's Degree
- Master's Degree
- Doctorate (Ph.D., J.D., M.D.)
- Other (please specify)

*** 16. Please select the gender with which you identify.**

(Mark only one.)

- Female
- Male
- Non-binary
- Prefer not to answer
- I describe myself as:

*** 17. Please indicate your age.**

(Mark only one.)

- 18 years old
- 19-25 years old
- 26-34 years old
- 35-44 years old
- 45-54 years old
- 55-64 years old
- 65+ years old
- Prefer not to answer

*** 18. What is your state of residence?**

[Drop-down]

*** 19. We are seeking participants for one-on-one virtual interviews for the NAFAN project, to help us further explore how people find archival materials on the web. Are you interested in participating in a one-on-one virtual interview? If so, and you are selected, you will receive a \$40 Amazon gift card after participating in the interview.**

(Mark only one.)

- Yes
- No

20. Thank you for being willing to be an interview participant!

Thank you for taking the time to participate in this survey to help OCLC Research and California Digital Library study the ways in which people look for archival material on the web. Please note that all responses are strictly confidential and anonymous. If you have questions about any aspect of this project or would like to obtain further information about this study, please contact:

Lesley Langa, Associate Researcher, OCLC, Inc. 6565 Kilgour Place, Dublin, OH, 43017-3395.
Email: langal@oclc.org

Please indicate your preferred email address where we can contact you. This will be used to inform you if you have won the drawing for a \$100 Amazon gift card and to notify If you have been selected to be interviewed.

If you are employed by an educational or cultural heritage institution and are comfortable sharing, please provide the name of the institution with which you are affiliated.

Please submit your responses and thank you for your time!

- Email
- Institution or Company Name

21. Thank you for taking the time to participate in this survey to help OCLC Research and California Digital Library study the ways in which people look for archival material on the web. Please note that all responses are strictly confidential and anonymous. If you have questions about any aspect of this project or would like to obtain further information about this study, please contact:

Lesley Langa, Associate Researcher, OCLC, Inc. 6565 Kilgour Place, Dublin, OH, 43017-3395

Email: langal@oclc.org or you can visit the study website at <https://www.oclc.org/research/areas/user-studies/national-finding-aid-network.html>

Please indicate your preferred email address where we can contact you. This will be used to inform you if you have won the drawing for a \$100 Amazon gift card.

Please submit your responses and thank you for your time.

- Email

APPENDIX B: NAFAN POP-UP SURVEY USERS' MATERIAL PREFERENCE BY TOP FIVE PROFESSIONS

Project purpose	Archivist/ librarian	Faculty researcher	Genealogist	Grad student	Retirees	Row total
Architectural papers	0.2% N=1	0.3% N=1	0.0% N=0	0.0 N=0	0.1% N=1	0.6% N=3
Art	6.2% N=28	12.4% N=37	6.9% N=22	15.3% N=42	7.9% N=54	48.7% N=183
Audio	12.0% N=54	11.4% N=34	8.5% N=27	13.5% N=37	5.4% N=37	50.8% N=189
Books	9.1% N=41	22.7% N=68	32.3% N=103	23.3% N=64	22.1% N=151	109.5% N=427
Corporate records	18.8% N=85	16.4% N=49	19.7% N=63	16.7% N=46	10.7% N=73	82.3% N=316
Findings aids	5.5% N=25	0.7% N=2	0.0% N=0	3.3% N=9	0.1% N=1	9.6% N=37
Government records	22.4% N=101	27.8% N=83	57.1% N=182	36.7% N=101	31.3% N=213	175.3% N=680
Magazines	14.0% N=63	24.7% N=74	32.0% N=102	32.7% N=90	23.7% N=161	127.1% N=490
Maps	11.8% N=53	18.1% N=54	36.1% N=115	17.8% N=49	20.6% N=140	104.4% N=411
Oral histories	14.9% N=67	27.8% N=83	38.2% N=122	30.9% N=85	19.4% N=132	131.2% N=489
Personal family papers	35.0% N=158	43.1% N=129	67.4% N=215	46.2% N=127	35.3% N=240	227% N=869

Project purpose	Archivist/ librarian	Faculty researcher	Genealogist	Grad student	Retirees	Row total
Photos	29.0% N=131	40.5% N=121	45.1% N=144	37.5% N=103	41.5% N=282	193.6% N=781
Videos	10.9% N=49	13.4% N=40	8.8% N=28	17.1% N=47	6.6% N=45	56.8% N=209
Any material	50.6% N=228	57.5% N=172	60.2% N=192	61.5% N=169	57.4% N=390	287.2% N=1,151
Other	12.9% N=58	10.4% N=31	7.5% N=24	10.9% N=30	9.1% N=62	50.8% N=205

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- ArchiveGrid
- ArchivesWest
- Arizona Archives Online
- Black Metropolis Research Consortium
- Chicago Collections Consortium
- Connecticut's Archives Online
- Online Archive of California

- Philadelphia Area Archival Research Portal
- Rhode Island Archives and Manuscripts Online
- Social Network Archival Collections
- Texas Archival Resources Online
- Virginia Heritage

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