

AUDIENCE RESEARCH FINDINGS

A detailed report of initial phases of work and user research findings

National Records of Scotland

Audience Research

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Executive summary

This report provides analysis, key findings and recommendations based on the three phases of 48 audience research sessions which took place on:

- Phase 1: 7th, 8th and 12th January 2021
- Phase 2: 2nd-5th and 18th-19th February 2021
- Phase 3: 9th-12th February 2021

Storm ID undertook extensive audience research to answer the following questions with some key recommendations. This document covers in detail:

Who are NRS service users?

- Who are the prospective users of NRS services?
- Which services do they use?

Through the research sessions we have identified five audience classifications:

- Novices
- Occasional
- Learners
- Experienced
- Experts

Within these classifications, we have grouped the thirteen personas based on their levels of engagement and level of experience using NRS services.

- Novices
 - Potential users
 - Life planners
- Occasional
 - Life admins
 - Confidence builders
 - History enthusiasts
 - Information seekers
- Learners
 - Budding researchers
- Experienced
 - Information gatherers
 - Knowledge sharers
- Experts
 - Tartan enthusiasts
 - Information preservers
 - Expert analysts
 - Information publishers

The personas document describes each of the personas needs and behaviours in relation to the NRS services that they have used to complete their tasks. Different user types that share needs and behaviours have been grouped into each persona, showing how and why different

personas use NRS services, how they use them and why they engage with the services – what their motivations are for engaging as current and potential users.

User needs, what are the services used for?

The user needs document outlines those for each of the NRS services and classifies them by audience and persona. As well, further analysis on the current NRS services user tasks is detailed in the analytics section of this report.

What could be improved for users, if anything?

The following themes for improvements across the NRS services have been identified:

Increasing awareness and clarity

This can be achieved by enhancing the awareness and findability of the NRS service offerings

Clarify the relationships between NRS services especially for 'Novices' and 'Learners'. This could be done through visual consistency amongst the services and signposting between relevant services.

Modernise the website's interface designs with consistency to reflect that NRS services are up-to-date sources of official, trusted information.

Signposting and engagement

Signposting between relevant services for different use cases. For example, natural relationships between NRS statistics & data and Scotland's Census.

And for Budding Researchers, Information Gatherers and Information Sharers, this may include:

- ScotlandsPeople
- Search rooms
- ScotlandsPlaces
- Scottish Handwriting
- Scottish register of Tartans

Help and onboarding to services for Novices and Learners to make it easier for them to understand how to use the services to complete their tasks by helping them find records, data and information.

Increasing availability

Through digitisation of additional records, clarifying service specific terminology and flexibility in search rooms opening hours. For example, online resources are available 24/7 however search room records access is restricted by time to visit and geography

Increasing confidence and capability

Educating novices and learners on how they can access information and records. Make it clear where users can find the information and records, they are looking for and clarifying when they can't. For example, statistical data or low level geographies that could compromise confidentiality.

These findings are covered in detail in this document, as well as an onward roadmap of the actions that can be taken to support and affirm the needs of NRS audiences.

Introduction

Storm ID were asked to produce audience personas and associated user needs documentation to inform a unified understanding of NRS audiences.

The project objectives were to identify and classify all NRS audiences (current and potential), to generate user personas which prioritise needs, goals and expectations, and to understand how the current digital estate is being used.

This work took place over three phases:



This document covers the full report for phase 3 of this project starting with the goals of the user research, the other phases being covered in the interim reports. However, we will consolidate some of those findings into this document for clarity and understanding.

Overall approach

Desk research and analytics

Consultants conducted a task analysis and Google Analytics (GA) review which led to initial recommendations on improving GA tagging and general task-related queries.

Stakeholder engagement

At project initiation, two workshops were conducted with large stakeholder groups from different NRS services. At project restart the consult conducted 1:1 and 2:1 interviews with service stakeholders within NRS.

- Adoptions
- Registrations (Births, Deaths and Marriages)
- PRSA (management of public records)
- NRAS (management of privately held records)
- Historical Search Rooms
- Legal Search Rooms
- ScotlandsPeople
- Extract Services (extract ordering)
- Tartan Registers
- Statistics

These interviews were to gather initial understandings of audience needs and groupings, as well as understand particular business needs and goals coming from stakeholders.

User research

We conducted a phased engagement with participants, at each phase revising who we were engaging with, what information was lacking, and extending our reach.

The user researcher established a line of questioning aimed at understanding the following goals:

1. Who are NRS service users? Which services do they use?
2. Who are the prospective users of NRS services?
3. User needs, what are the services used for?
4. How and why have users engaged with NRS services?
5. What works well for users within the services?
6. What could be improved for users, if anything?

Summary

Bringing these phases together gave us a holistic understanding of NRS users, and how they are impacted within and across the services on offer.

Outputs

The outputs associated with this project are as follows:

- Audience personas
- User needs catalogue and audience classification model
- Alignment with other NRS projects
- Research report (this document)
 - Previous reports include
 - Interim project report 27th April 2020
 - NRS Work to date and user recruitment brief 17th November 2020

In addition to the above, we presented full research findings to key stakeholders on the 3rd March 2020 and include the raw data analysis outputs with this report.

As agreed with NRS, due to changes throughout the project and challenges with the analytics set up of the NRS sites, we were unable to get a clear and data-driven understanding of user journeys throughout the digital suite. Therefore, user journey maps are not included in this report.

Desk research and analytics

Outline of work

We conducted a review of user tasks across the NRS site suite and initiated an analytics review against these tasks. There were limitations to the review related to the setup of google analytics.

Whilst a specific health check of the analytics account wasn't initially included within the scope of this project, we have identified a number of issues with the existing Google Analytics set up which means it is not fully optimised for tracking data.

These can be summarised as:

- a. Incomplete tagging: e.g., especially on Tartan Register, Scottish Handwriting, Scottish Archive for Schools, Scottish Archive Network and Scottish Documents. This can lead to distorted view of traffic.
- b. Lack of tracking data: Some applications have no analytics tracking (e.g. search rooms applications)
- c. Goal tracking: we recommend implementing further goal tracking across analytics. This will allow for a better understanding of the process users take towards reaching the goals and would simplify the determination of pages that are key for this process. The additional goal data will help refine user needs regarding a rebuild of the website

Consequently, although there was sufficient data to undertake some useful analysis, the potential for data analysis was limited and constrained. This led to refocussing attention from customer journey maps to mapping requirements and developing effective personas.

Our analytics analysis considered the following:

- Analysis of the most viewed pages across the NRS digital estate i.e., pages with most page views
- Analysis of how users access the NRS estate and navigate across the NRS websites
- Analysis of the content areas that currently appear most important for currently satisfying user needs

The sites which we have analysed analytics data in detail to date are:

- National Records of Scotland main website
- Tartan Register
- Scottish Handwriting
- Scotland's Census Scottish Archive for Schools
- Scottish Records Advisory Council
- Scottish Archive Network
- Scottish Documents

We have also analysed these sites in terms of how they contribute to referrals

- NRS Connect
- NRS Catalogue
- NRS Web Archive
- ScotlandsPlaces
- ScotlandsPeople

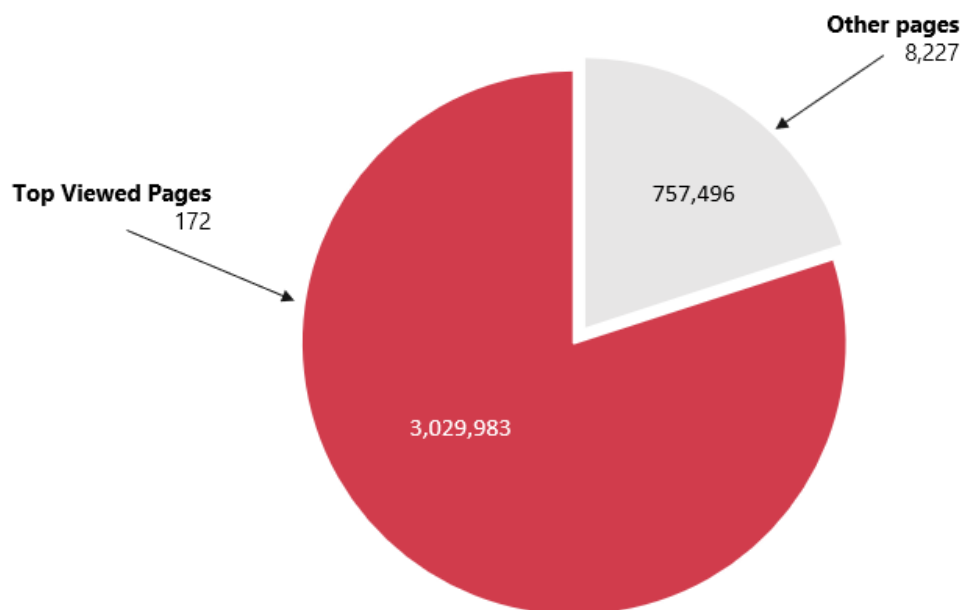
The time period we have reviewed is the full year from January 1st, 2019 to December 31st, 2019. The COVID-19 pandemic may have changed some of the ways users interact with the site.

Key findings

Short head v long tail

The data suggests site usage is heavily focused on just a small portion of the site content.

In fact, 80% (~3 million) of all pageviews are driven by just 2% (172) of site content (top landing pages)

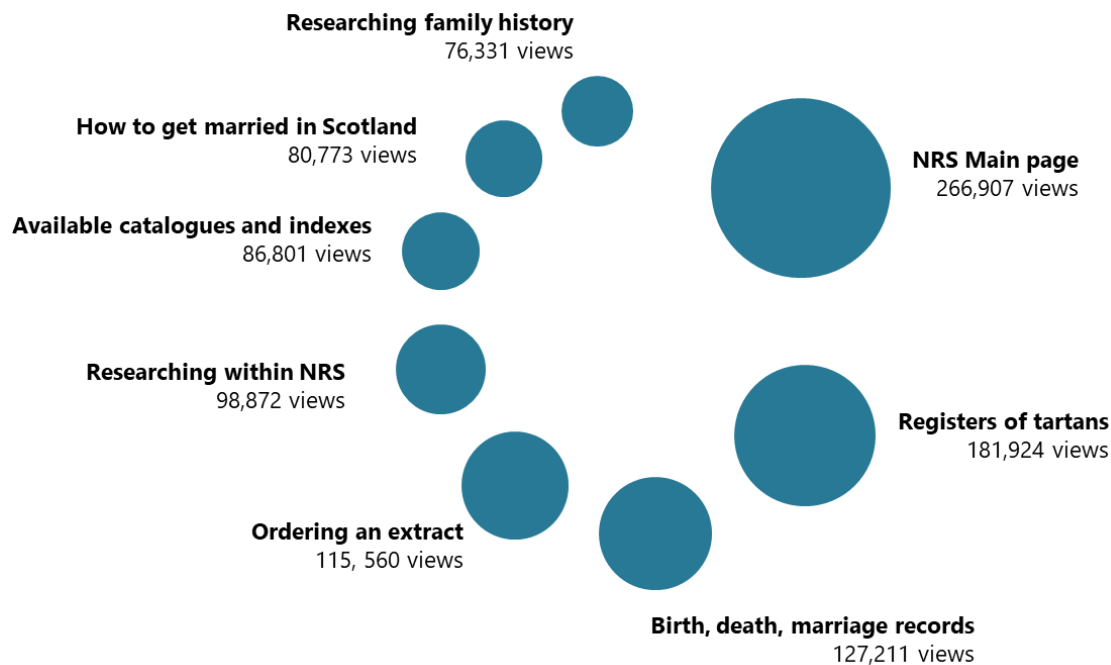


This indicates that the majority of users are focused on a one or more of a small subset of the tasks for which the sites cater. This strongly supports the recommendation to rationalise content to focus on the core tasks.

The main user task focus across the suite was on family history, getting married in Scotland, or ordering records and extracts.

Top tasks: pageviews

The top 8 tasks across the whole web suite were predominantly through the NRS main site, as well as directly through the register of tartans.¹



Broadly, this corresponded to the pages by which the user entered the NRS suite, with some significant differences.

Top tasks: Site entrances

Site entrances are the pages through which users enter the NRS suite to begin a session. The NRS main page and Registers of Tartans remain the top two entrance points of the suite.

It is helpful to consider the context of an entrance point in that it can be indicative of either the specific task a user wants to undertake, or alternatively a failure in signposting tasks effectively through good search engine optimisation, social media and other referral channels. For example, a user may land in the site at a page that does not immediately match their user need and must navigate the site to find the page that does.

¹ The URLs considered here are:

NRS Main page <https://www.nrscotland.gov.uk/>

Registers of tartans <https://www.tartanregister.gov.uk/index>

How to get married in Scotland <https://www.nrscotland.gov.uk/registration/getting-married-in-scotland/how-do-i-go-about-it>

Ordering an extract <https://www.nrscotland.gov.uk/registration/how-to-order-an-official-extract-from-the-registers>

Birth, Death, marriage records, <https://www.nrscotland.gov.uk/research/guides/birth-death-and-marriage-records>

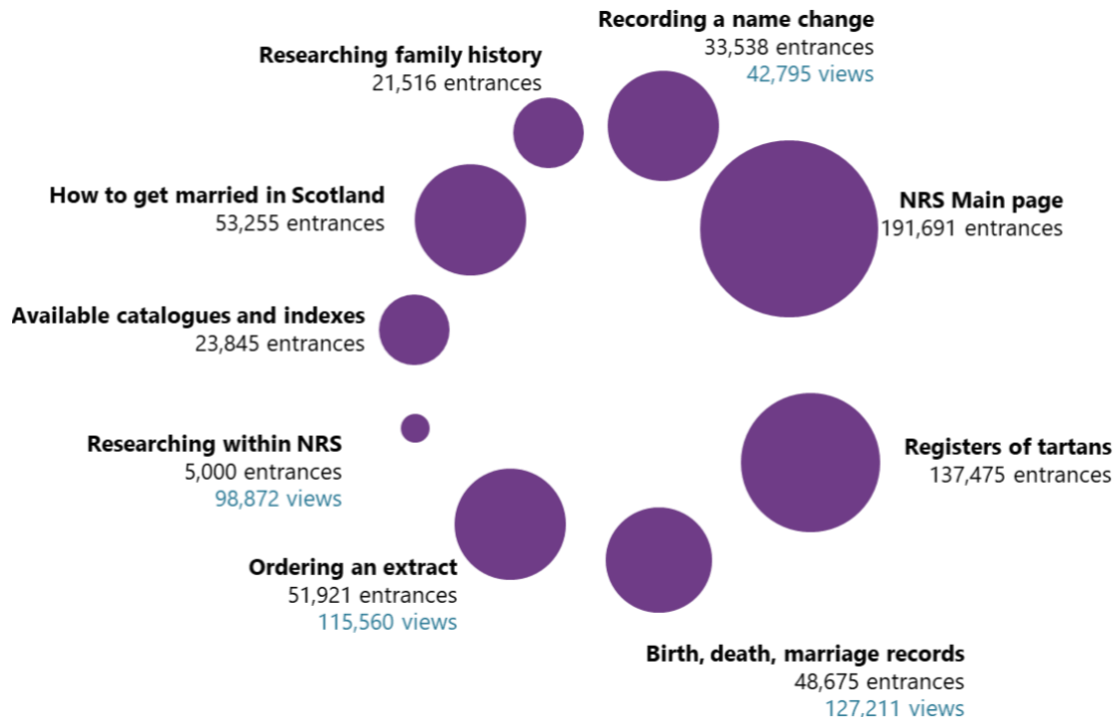
Recording a name change <https://www.nrscotland.gov.uk/registration/recording-change-of-forename-and-surname-in-scotland>

Available catalogues and indexes <https://www.nrscotland.gov.uk/research/catalogues-and-indexes>

Researching family history <https://www.nrscotland.gov.uk/research/family-history>

Research: <https://www.nrscotland.gov.uk/research>

The homepage aside, which is a broad exception to this rule, you would expect a well-functioning site to surface broadly similar user needs across pageviews and entrances, albeit the pageview counts would be higher.



Some clear observations emerge, including that there are relatively few people that view the NRS main page more than once. This indicates that this is functioning as an entrance point and signpost frequently, suggesting that users are spring boarding from there to their actual task page.

Additionally, users whose task is to *Record a name change* may be very well served by the existing site architecture, as most users who view this task enter the site there (although there is a risk that the actual effect is that users cannot easily navigate the site to it). However, it most likely indicates a positive search or referral journey, and that these users are not often repeat users over multiple sessions.

Similar observations can be made for the task *How to get married in Scotland*, which has a similar entrance v pageview dynamic. It stands out as having generated a significant number of views and entrances, but distinct from the focus of other top tasks which are more historical in nature. This suggests that this is a key section of this site which generates high engagement².

Ordering an Extract had a similar number of entrances and views to *Birth, death and marriage records*. From the user research, there are distinct correlations between these tasks; many who

² Marriages in Scotland, from the stakeholder work, also generated a high number of queries, see p. REF

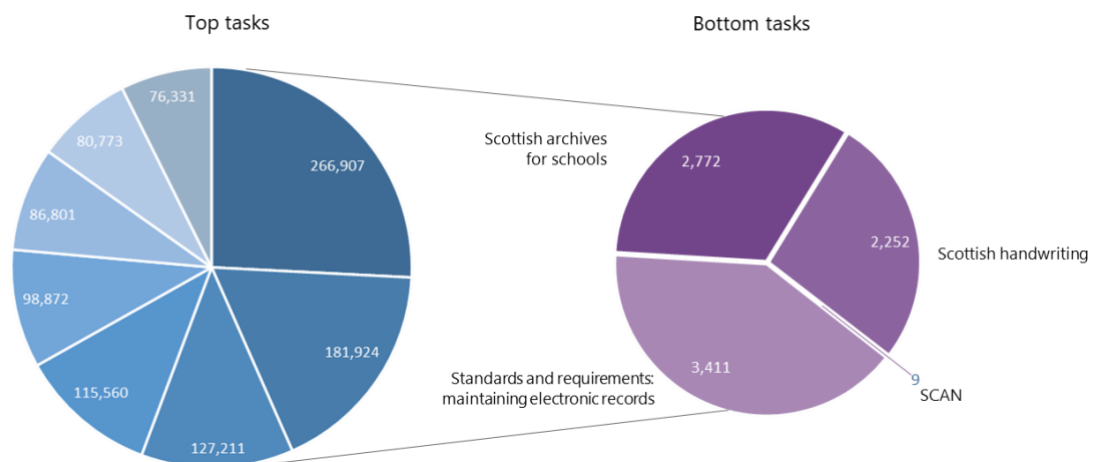
are searching historical records may order an extract. However, ordering an extract is a service that many users undertake as part of their historical research or as part of life administration, and as such it is not directly clear from the available data how strong this correlation is.

Researching within NRS, demonstrated a high number of pageviews but relatively few entrances. This indicates that the page is a guidepost rather than an entrance point; users often engage with it repeatedly as they navigate through different items, such as available catalogues and indexes or researching family history.

The only site that is a top task across the web suite that is not consistent with the NRS main website is the Register of Tartans, which is the second most used page in the NRS suite. Repeat use and engagement with this service indicates that it is supportable and valuable as its own webpage.

Top tasks vs bottom tasks

The bottom tasks recorded across the NRS suite indicate either that the services might work better as tools rather than standalone sites, or if traffic isn't being generated to some pages then more work might be done to understand how to improve findability.



Key recommendation: Search Engine Optimisation

Findings from Storm's work with the Census team indicated that Google search tends to merge the Census sites with the primary NRS home page. This contributes to brand confusion, pointed out across our search projects with non-users, to be outlined further in the user research. However, it was clear that work needs to be done to promote accurate site findings and effective prompt text that enables a user to differentiate results and take positive action.

Further, other services are prioritised over NRS by internet services. Users are often seeing paid services not related to NRS first in Google, such as Ancestry.com or the non-official sites for ordering certificates.

In addition to the suggestion below, a clear content review of the NRS suite and effective Search Engine Optimisation would benefit users and prevent them from getting lost before they reach the services that are there for them. We could create consistent journeys from media, to Google, to finding the correct area of the NRS site suite.

Other recommendations

Rationalise content

There are a high number of rarely viewed pages on the NRS digital estate. Over half the pages recorded had below 10,000 views out of 2 million total.

This means that when planning changes to the digital estate, it is likely that the number of pages can be greatly reduced.

Eliminating or merging redundant pages will focus users' attention on top tasks and reduce the complexity of the navigation structure and the number of distracting links.

Once content is rationalised, the remaining pages on the site should ideally all represent clear user needs that are determined through insight via research/stakeholders/data analysis.

This will help the majority of users find what they are looking for much faster.

Streamline user journeys

There are a number of common user journeys that occur across multiple domains. This indicates potential opportunities to combine / merge certain websites and streamline user journeys for users.

The review also indicates that some users are not directed most efficiently in relation to their user intent. For example, only one third of users looking to find information about registration begin their website session at a suitable entry point. This indicates a failing in referral signposting, SEO, and similar activities.

This indicates that there is work to do to improve signposting with the websites and also around search engine optimisation.

Once all the user needs are established for user groups, user journeys can be designed to ensure users find information as quickly and easily as possible.

Actions for google analytics

We would recommend the following actions around Google Analytics:

1. Install Google Tag Manager which would enable easy tagging, tracking and testing of tracking code without having to go through deployments³
2. Ensure tracking and goal tracking is in place across the estate.

³ https://marketingplatform.google.com/intl/en_uk/about/tag-manager/

3. Undertake further ongoing health check work across the analytics accounts with a view to developing a prioritised road map for remedial work in optimising tracking and ensure compliance with data privacy regulations.

Stakeholder engagement

Outline of work

At project initiation, two workshops were conducted with large stakeholder groups from different NRS services. These workshops initially focused on users who engage with NRS for reasons of historical research for the first, and following this with PRSA and NRAS, as well as other professional services.

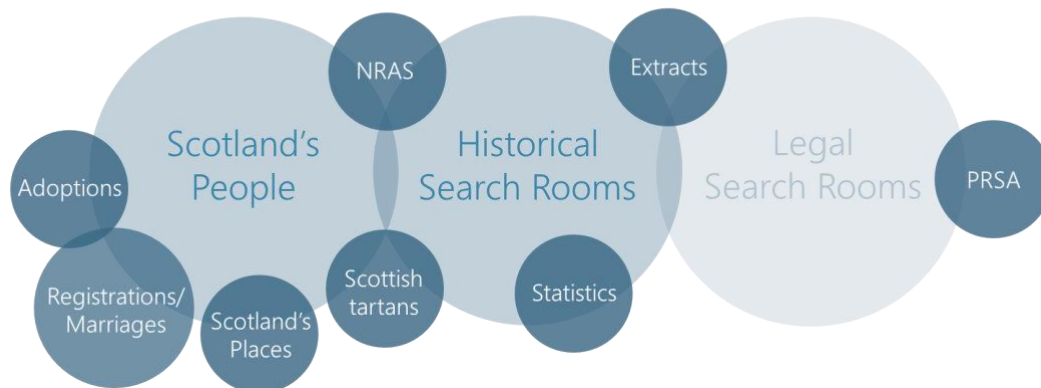
In response to new entirely digital and remote ways of working, when the project restarted we conducted 1:1 and 2:1 interviews with service stakeholders within NRS covering services in and out of scope:

- Adoptions
- Registrations (Births, Deaths and Marriages)
- PRSA (management of public records)
- NRAS (management of privately held records)
- Historical Search Rooms
- Legal Search Rooms
- ScotlandsPeople
- Extract Services (extract ordering)
- Tartan Registers
- Statistics

Key findings

Initially, work with Stakeholders within NRS allowed us to understand the points of entry for many NRS audiences. The drivers to engage with NRS come from across the spectrum of personal to professional. This was an indicator of how we might understand audiences and they ways they engage with NRS.

Personal —————> Professional



Following the interviews with stakeholders, we were able to home in on user groups for specific NRS services which allowed us to initiate recruitment.

NRAS

- Private owners, inherited
- Private owners, developed
- Specialist researchers
- Stakeholders in communities

Adoptions

- General genealogy enquirers
- Personal adoption enquirers
- Adoptive parents
- Birth parents

Extracts

- People getting married
- People getting divorced
- People needing a visa
- People applying for citizenship
- Insurance companies
- Police and social services
- Solicitors and lawyers (personal)
- Pensions companies
- 3rd parties (commercial/large bodies)
- Legal search rooms users
- Credit agencies
- 3rd parties (non desirable) selling search services
- Historians looking for physical evidence (rare)

PRSA

- Plan implementers
- General public
- Record managers
- Archivists
- Public enquirers

Registrations

- Birth/stillbirth life events
- Death life events
- Marriage life event (other queries!)
- Death enquiry
- Name change registration
- People getting divorced
- Trans or NB persons

HSR and Scotland's People Statistics

- Family historians (experienced)
- Family historians (new)
- Genealogists
- Academic historians (expert)
- Academic historians (new)
- Scottish diaspora
- Diaspora living in Scotland
- School age children (trip based, mainly)
- Teachers

- Commercial decision makers
- Public sector decision makers
- Academic researchers
- Expectant parents
- Scottish residents
- Scottish diaspora
- Teachers
- School age children

Legal search rooms

- Land disputes
- Search companies handling legal searches
- Search companies handling searches for legal bodies
- Family historians
- Bereaved relative/friend
- Will dispute
- Sheriff Courts wills and testaments

Key recommendations

The engagement with stakeholders also allowed us to understand some of the key pain points for internal stakeholders, and their understanding of their particular user groups and needs.

Some of this information has already been passed back to NRS. Further, continuing on from the user research outlined below, the other projects conducted with NRS and the initial analysis and stakeholder work, we have outlined some key recommendations in the Cross Project Alignment section.

User Research Approach

We directed our user research based on the information coming out of the stakeholder approach. We took a phased response to the research brief, at each stage revising the gaps in our recruitment with NRS stakeholders and reaching out to those who would fill those gaps.

The services that we have covered in phase 1 research are:

- National Records of Scotland website - nrsotland.gov.uk (Family history)
- ScotlandsPeople website - scotlandspeople.gov.uk
- ScotlandsPeople Centre - Edinburgh
- ScotlandsPlaces website - scotlandsplaces.gov.uk
- The Scottish Register of Tartans website - tartanregister.gov.uk
- Extract services - New Register House, Edinburgh

The services that we covered in phase 2 research are:

- Scottish Archives for Schools - scottisharchivesforschools.org
- Scottish Handwriting website - scottishhandwriting.com
- The Scottish Register of Tartans website - tartanregister.gov.uk
- Learning events, public talks or exhibition
- Historical Search Room - General Register House, Edinburgh
- Prospective users
- Extract services

The services that we covered in phase 3 research are:

- National Records of Scotland website - nrsotland.gov.uk (Research and statistics, NRAS, Record Keeping)
- ScotlandsPeople website - scotlandspeople.gov.uk
- ScotlandsPeople Centre - Edinburgh
- Historical Search Room - General Register House, Edinburgh
- Learning events, public talks or exhibition

Recruitment methods

Based on the services identified for this audience research, Storm ID identified and recruited relevant participants from varied geographies, educational and professional backgrounds to participate in the research sessions.

Phase 1

We worked with NRS to share a screener survey on NRS social media channels. The survey ran from 10-25 December 2021 and 494 participants responded to the survey.

We conducted 13 one-to-one online interviews with participants using Microsoft Teams.

Phase 2

We continued to recruit from the panel of participants recruited through the social media survey. Where we had identified gaps from the existing research panel we worked with third party recruiters to identify relevant participants. These interviews took place on 2-4 March.

We conducted 20 one-to-one online interviews with participants using Microsoft Teams.

Phase 3

The team at NRS identified and recommended Super Users of some of the remaining services to understand how expert and experienced users engaged with NRS services.

We conducted 15 interviews with participants – 14 were conducted online using Microsoft Teams and was conducted by telephone.

Research participants

In addition to the people surveyed, a total 48 participants were interviewed on a one-to-one basis across three phases (see Table below).

Phase	Participants
Survey	494
Phase 1	13
Phase 2	20
Phase 3	15

We found that many participants used more than one NRS service. The table below shows the collation of how many users had used each of the NRS services, across all phases.

Service	Research phase			Total
	1	2	3	
Extract services	3	5		8
Historical Search Room <i>General Register House, Edinburgh</i>		5	5	10
Learning events, public talk or exhibition		4	2	6
Local family history centres/ScotlandsPeople Centre <i>Edinburgh</i>		2	1	3
National Records of Scotland website <i>nrsotland.gov.uk</i>	6			6

National Records of Scotland website (Historical enquiry) <i>nrscotland.gov.uk</i>		2	3	5
National Records of Scotland website (Record Keeping) <i>nrscotland.gov.uk</i>			1	1
National Records of Scotland website (Statistics & data) <i>nrscotland.gov.uk</i>			6	6
National Register of Archives for Scotland			2	2
Non-users		2		2
ScotlandsPeople website <i>scotlandspeople.gov.uk</i>			3	3
ScotlandsPeople website & ScotlandsPeople Centre, <i>scotlandspeople.gov.uk</i>	7			7
ScotlandsPlaces website <i>scotlandsplaces.gov.uk</i>	6			6
Scottish Archives for Schools <i>scottisharchivesforschools.org</i>		3		3
Scottish Handwriting website <i>scottishhandwriting.com</i>		2		2
The Scottish Register of Tartans website <i>tartanregister.gov.uk</i>	3	3		6

A full listing of all participants, their background and the services they used are available in the Appendix: Participant tables.

Key findings and insights: Audience classification

The key findings and insights in this document are reported in relation to each service as well as overall key insights for the National Records of Scotland services.

National Records of Scotland services are used to find data and records that are viewed as official, trusted sources of information to be used as evidence in support of personal and professional research, future resource planning, policy making and personal matters such as obligatory legal documentation.

Based on the research conducted during this project, the audience is categorised in to five groups:

1. **Novices**

Novices are prospective users that have an awareness of NRS. They have not used any of the NRS services but have an interest in using NRS services to complete personal matters or research or for academic research as part of their studies in the future.

2. **Occasional**

They have used NRS services on an occasional basis when they need to complete personal matters like birth or registrations or request copies of official documents for legal matters.

3. **Learners**

They are active, regular users of NRS services for academic studies or research. They have used the services for a few months, but rarely engage with NRS staff for support or to ask questions.

4. **Experienced**

They have used NRS services for a number of years to find resources, data or information for personal or professional research or analysis. They are comfortable using the services and self-sufficient. They may provide feedback to NRS staff about data or resources to NRS on errors that they spot.

5. **Experts**

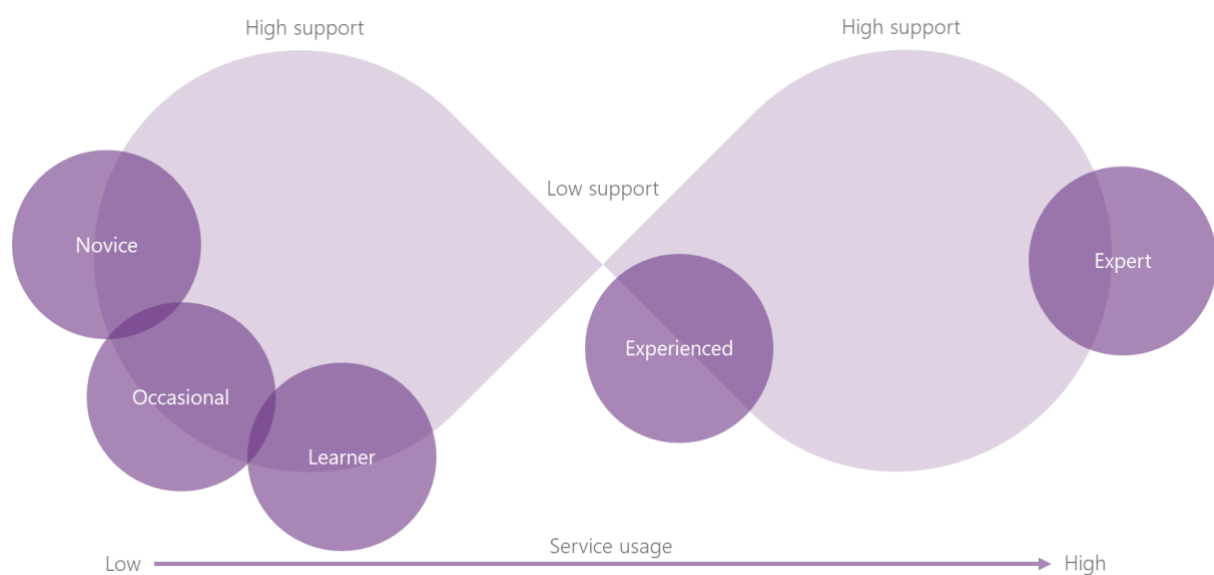
They are active, regular users of NRS services that know the services that they use very well. They are reliant on NRS data or information for their professional needs. They have close working relationships with NRS staff that they engage with to question or request bespoke data sets, records and information.

When considering the more complex services such as the Historical and family history search rooms and the NRS website, the level of experience and confidence of a user bares a key relationship with how much support they need from NRS staff to complete their tasks and how easy to use they find NRS services.

At the beginning of their relationship with NRS, 'Novices' and 'Occasional' user types seem likely to lack confidence with the more complex services due to challenging overwhelming digital and in-person experiences. A lack of onboarding to services or guidance on how to complete their tasks contributes to this feeling of being overwhelmed or not knowing how to complete their tasks.

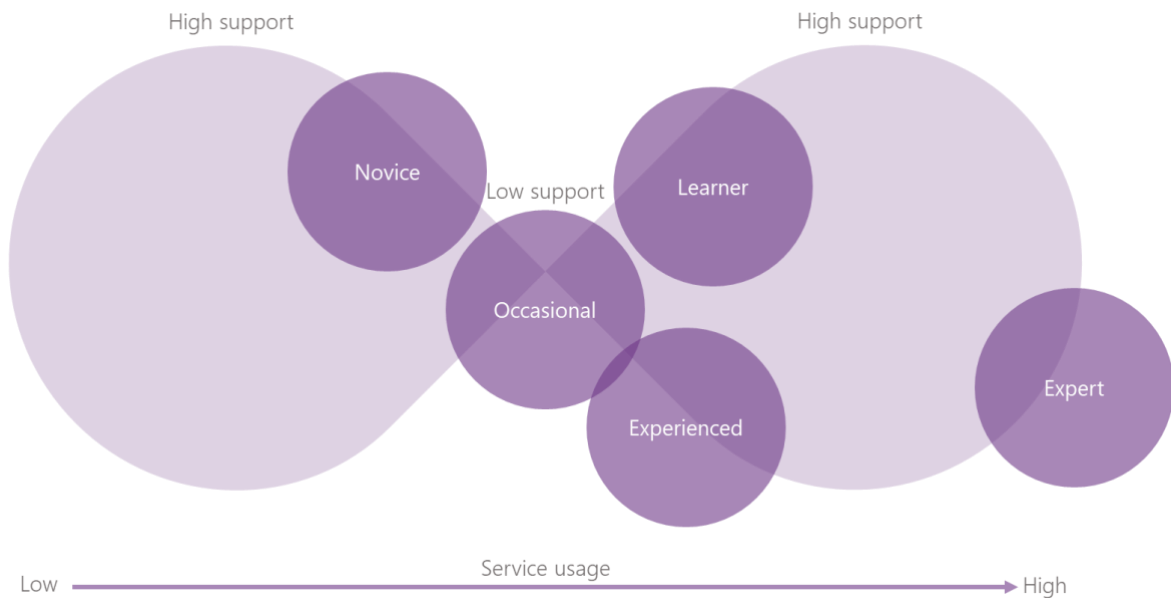
As users become more experienced, they need less support from NRS staff to help them complete their tasks – this is particularly relevant for audiences conducting historical enquiries, research and data analysis. However, 'Experts' have tended to form good working relationships with the NRS staff because they understand their processes very well or require bespoke assistance which results in more engagement with NRS staff for their support.

As-is scenario: NRS staff support for each audience type



If user journeys and signposting within digital services and search rooms are enhanced and made clearer to users no matter their experience level, the services could become easier to use. Then the requirement for support for new or less experienced users from NRS staff could decrease.

Future scenario: NRS staff support for each audience type



KPIs can be put in place to measure the success of user journeys, help topics as telephone support to measure the success of user journeys.

Service key findings: Prospective users

Based on the five participants that we spoke to we identified the following findings:

User tasks

The tasks that drew these users were often as follows:

- Request a copy of their birth certificate
- Register a birth or marriage and then change their name
- Research their family history
- Research for a study project
- Take part in the Census
- Research a tartan for their family name

Motivations

User motivations for engaging with and completing the service included:

- Having a copy of a certificate in case they are needed in future
- Using their personal document for an application for an official legal document or process

Positives

- Heard of NRS through a TV show about ancestry
- Their parent has been working on their family history for the last 4-5 years. They've been reminded of NRS through Covid-19 statistics announcements on social media

Pain-points

Website interfaces

Dated interfaces make the sites feel that the information hasn't been maintained or that it's not an active

Signposting

NRS website homepage very busy which overwhelms them – they don't know clearly what the site is for or what they can do there

Clarity of information

Global navigation headers didn't always make sense, the Research and Registration labels lack clarity to tell them what they can do with NRS services – the quick links such as Family history and Ordering a certificate tend to clarify this somewhat

Association of NRS services

Participants didn't know that there were other services associated with NRS before looking at the website and didn't find the list of services in the footer because they closed the page. The services that stood out to them were Scottish Register of Tartans and Scottish Handwriting.

Opportunities

Raise awareness of other relevant services amongst this audience:

- SEO and content audit – implement best practice and content improvements
- PPC campaigns for relevant services
- Learning events
- Social media and PR campaigns to promote events, raise awareness of other relevant services to amplify current awareness on covid statistics, e.g. registrations

Service key findings: National Records of Scotland website - nrscotland.gov.uk – Historical enquiries

Historical, research or educational enquiries – family history, school or university projects, local Scottish history

Based on the 11 participants that we spoke to about this service we identified the following findings:

User tasks

These are the key activities that participants have used this service for:

- Using research guides to identify where particular records can be found
- Pointing students to research guides so that they can find out where particular records can be found
- Searching the online catalogue to find information, some need expectations set around what they will be able to find using the catalogue
- Using the catalogue to try and identify particular documents about specific areas of historical interest e.g. people from a particular family or area of special interest like pottery, fishing industry or musical piping
- Reading and copying the information found in the specific documents to include in their research
- Reading help information to find out how to find particular records or understand why they can't be found
- To know what is in the records that are of interest

Motivations

These are the reasons why participants use the service:

"It's like a google for Scotland for me."

P6: phase 2

- To view the official, trusted sources of information to support research projects
- To find documents relevant to their research projects
- To find information of interest about Scotland
- To save time by only viewing relevant records and information

Positives

These are the positive experiences that participants have experienced when using the service:

- Research guides are a helpful starting point to identify where to look to find the records that participants are looking for

Pain-points

These are the challenges that participants have experienced when using the service:

Brand perception - interface

Some participants said that the interface looks dated and had not been updated since they started using the service. The prospective user participants said that this made the site feel like it wasn't up to date with accurate information

Cognitive load / Signposting

Some prospective user participants said that there was a lot of content on the homepage, and it wasn't immediately clear what information they should be drawn to.

"It doesn't feel that inviting the way it's displayed. I don't think they are communicating who they are and what they do. It's not coming through in a nice punchy way right now."

P1: Prospective User

Online catalogue search

Participants said that the search functionality isn't as intuitive or flexible as on the ScotlandsPeople website. When participants have searched using the NRS catalogue they have found it difficult to narrow down the search to the particular document that they are looking for. For example – a specific family name 'Gordon' from an area 'Aberdeenshire', numerous searches are needed to be performed using different words and phrases to return a list of relevant search results.

Some participants said that the search button gets lost in the page. This makes it more difficult and time-consuming for them to complete their research tasks. This is of particular note when new users are coming to use the catalogue for the first time

"The layout could be improved to make it intuitive to know what steps you need to follow and what to do next" ... "It was harder to get set up and started, but once I was using the service it was ok. But it wasn't as straightforward as I would have thought"

P2: Phase 1

Lack of sign-posting on virtual volumes

Some participants said that they thought there are more records and therefore information that weren't obviously available, and were therefore under-utilised.

"It seems like there's a wealth of information on the virtual vaults which would be amazing if those could be made more wildly available. Some things seem to be hidden away and not used as much as it could be."

P2: Super-User

Opportunities

Updating the search function so that it is easier to use by:

- Using clear signposting to make it clear how to use search fields e.g. using different words or spellings to narrow relevant search results
- Ensure the number of fields is optimised so that users can narrow their search to identify the document they are looking for
- Educating users and providing guidance on how to find different spellings or naming conventions to find documents - through tooltips or search function guides can provide helpful signposting to users through the process of finding the correct document.

By updating and modernising the website interface and search function, there is an opportunity to create a modular, consistent feel and familiar user experience across multiple NRS web

services. This could help users feel more confident when searching and that they have found what they're looking for.

The online catalogues could make it easier for users to understand what is in the records that they find to allow the user to determine whether or not a record is going to be relevant for them or not. This will allow users to save time in having to view the record. The ScotlandsPeople website has been cited as modern with an effective search function because it is clear what the user needs to put into the search to find the document that they are looking for.

"It's difficult to find information as the catalogues don't tell you what's in the record just that they exist so have to go and see the record to see if it's what you need."

P1: Phase 1

"Where do I find this? What does this mean? How do I access this? Why can't I access this?"

P9: Phase 2

National Records of Scotland website - nrscotland.gov.uk – Statistics & Data

Statistical or data enquiries - e.g. statistics about Scotland, Census information

Based on the six participants that we spoke to about this service we identified the following findings:

User tasks

- Find birth data by mother's area of residence
- Find population data
- View summaries of population statistical data from NRS PDFs
- Find population estimates
- Find household projection statistics
- Find depopulation estimates using different metrics e.g. nationality, age
- Find mortality data
- Download death records annually
- Find statistical information to use to set the scene for a report
- Download statistical data in excel sheets
- Download statistical data in tables that is segmented with the specific parameters that I need
- Communicate with NRS about the possibilities of accessing other data sets

Motivations

Academic research

- Using various population and fertility data sets to support Scotland specific research for a PhD project
- Using alcohol specific deaths data to support research that informs alcohol policy in Scotland

Policy management

- Using population and depopulation estimate data to gain an understanding of migration through Scotland's local authority areas, using information to influence policy
- Using deprivation and poverty data to understand its contribution to health trends in Scotland to create publications that can help inform policy makers

Planning and analysis

- Using population data and household projections to inform infrastructure planning for future public services
- Using various data including population data sets to visualise analysis for Scotland and UK freelance analytical projects

"A key part of what I do as an analyst is find the best source of data and certainly NRS data is a fundamental source of these key data sets"

P7: Super-Users

Positives

NRS Service – staff engagement

Participants said that they contacted NRS through social media or email enquiries, to ask questions about data sources or bespoke requests. NRS staff have provided helpful answers to questions and show willingness to support users by having conversations and reaching compromises where needed to provide the information and clarity that participants have needed.

"I've dealt with statistical offices in other countries, and NRS are better to deal with than anyone else. They're better in pretty much all ways. They're more helpful, and more human."

P5: Super-Users

"Really impressed with service from the NRS, always approachable and keen to get involved and see how people use their data."

P3: Super-Users

Format of data sets

Some experienced analysts prefer being able to download specific data sets in spreadsheets so that they can work through the relevant data. Some participants also like the PDF summary reports and feel that the information works well for them.

"It meets my requirement of getting to the data quickly. I like their summary reports."

P7: Super-Users

Confidence and capability

Participants using NRS to access statistical data sets are experts in their field. They are very familiar with the process and know where to look to find the information because they have accessed the data sets for a number of years. Some participants have used bookmarks to and know where to look to find the information.

Pain-points

Availability of data sets

Some data sets at low level geography aren't available due to confidentiality. This is because it may be possible to identify individuals at such low levels. There are some instances where participants felt that it would be helpful to be able to access this information and that confidentiality would not be an issue – for example, data about commuting that is 10 years old.

"There's not always what I want there. If the information is there, I have been able to get it out"

P9: Super-Users

Consistency of metrics

Some participants analyse data from multiple statistic offices in different countries. Because NRS uses international metrics they can be different to other countries which can make it challenging for researchers or analysts to draw comparisons between different data sources.

"Selfishly I would like to understand when Scottish data is meaningfully different from English data for various different reasons. Scotland and England have different definitions of drug related deaths."

P5: Super-Users

Opportunities

Format of data sets

Some researchers prefer using an inline tool so that they can select the data set that they want opposed to all data for their particular topic.

Providing multiple parameters and functions for analysts and researchers to access data both in full spreadsheet data downloads and the ability to manipulate the information before they download it will allow users to select the information that they need for their research and work with the information in the way that they prefer.

"There's no way to manipulate the workbook before you download it, whereas a lot of other sites let you format it how you want before you download"

P9: Super-Users

Communication

Some participants found that they were unable to access the statistical data they needed due to unclear guidance on how to request the information and slow responses to their requests.

Clarifying timelines, request parameters and clearly communicating responses to requests will enable users to plan their research and analysis accordingly based on availability of the data that they need.

"I understand the need for checks and balances, but I think this went way over the core and it threatened the viability of the project."

P13: Super-Users

Some participants cited that its useful to know when new data and publications are released to that they can keep up to date with useful information. Whilst this information is published on the website, participants said it was not easy to find. Making this information more visible and easier to find will allow users to be aware of what NRS is publishing that is of relevance to their research and analysis.

"There's another area of the website which is helpful but not easy to find, which basically tells you when the next publications are going to come out, very helpful as helps you look out for things."

P13: Super-Users

Staff engagement

Most engagements with NRS staff are very helpful, however some participants said that they felt that being able to access information in a way that suited their needs was because their colleagues knew NRS staff. They felt it would be easier if there was an obvious formal route to access NRS information promoted online.

"There could perhaps be a more obvious way to access data that's safeguarded"

P9: Super-Users

National Records of Scotland website - nrs.scot.nhs.uk – Professional or commercial enquiry

Professional or commercial enquiry e.g. record keeping, how to maintain or store archives

Based on the three participants that we spoke to about this service we identified the following findings:

User tasks

- View NRS best practice policies on records management, conservation and digital preservation

Motivations

- To create policies for their workplace whilst being aware of best practice standards
- To be aware of and share best practice standards within their workplace or network

Positives

- NRS fosters the Edinburgh Preserves network where digital preservation practitioners foster best practice
- NRS fosters an engaged network of professionals interested in PAMS

Pain-points

Navigation and sign-posting

The global navigation labels used to find records management policies were unclear between Research and Records management

Website interface

The homepage interface seems unclear because there is a lot of information included on the page, this means that it is difficult to find a specific item like records management policies

"I think initially I would have looked under research, every website you go to you have to try a few different areas so it's only natural."

P1: Super-Users

Opportunities

Interface

The website interface could help users to complete their tasks more efficiently, enabling more efficient search and findability would be very important for many users.

Service key findings: Scotlands People website - scotlandspeople.gov.uk

Based on the 12 participants we spoke to we identified the following findings:

User tasks

- Finding birth, marriage and death certificates
- Creating masters' genealogy course assignment materials using church records

- Checking student coursework

Motivations

- Finding official, trusted sources of information to detail genealogy research

Positives

Availability of records

Participants said that they were happy with the ScotlandsPeople service because the records are readily available and well-curated for search. This makes it possible for users to find the records that they are looking for online.

"For Scotland information is so available and well curated ... and the tech is good ... really happy with service overall"

P5: Phase 1

"ScotlandsPeople is very comprehensive and the records held by NRS are incredibly comprehensive. Death, birth and census records that are very, very full. They don't cover an unlimited amount of time but they do cover a very vital amount of time when you're researching family history."

P13: Phase 2

The online service provides a benefit to users because they would otherwise have to pay to travel to Edinburgh and spend time in the NRS buildings conducting their research. The online service is a flexible way for participants to conduct their research.

The more experienced participants expressed the desire for more Kirk sessions records to be added online for their research.

"If they ever wanted to put the kirk sessions online I would happily pay"

P6: phase 1

Document quality assistance

Staff are deemed to be very helpful because they will email rescanned documents, transcripts of illegible documents and correct errors which are reported by users.

"If you find an error, they get back to you and fix it in a few days. It's an excellent service it would be nice to see the same approach to the other datasets."

P13: Phase 1

Search functionality and results – experienced researchers

Participants experienced in conducting research using the website, said that the greater number of search fields compared with other NRS services helps them to identify the records that they are looking for, they have the knowledge and experience to use wildcards and different spellings to help them use the search function effectively.

The detail shown within the index is helpful in identifying that the correct document has been found before clicking to view.

"One thing that's quite good and more sophisticated than other databases is the different options on how to search names"

P2: Phase 1

"Overall it's quite an easy website to use. It's quite clear when you log in. Quite obvious where you put your search option and what to look at."

P3: Phase 1

"The search interface has remained largely constant, gotten better within the last 4 years, became more flexible and change search parameters more easily."

P2: Super-users

Service cost:

It's very appreciated that NRS provides a number of credits for students to use for the studies.

Amongst participants living in Australia and USA, the cost is perceived to be far less than travel and expenses to conduct research in person and is therefore not a barrier. NRS provides a number of ScotlandsPeople credits for students which is appreciated.

"I find it's very, very reasonable"

P6: Phase 1

"It makes it possible from America to solve mysteries about 6 generations of my family"

P5: Phase 1

Pain-points

- Search functionality and results – learning researchers

For less experienced budding researchers – participants said that they find they have a lot of search results returned from their search criteria. This makes it more challenging and time-consuming to identify the specific document and information that they are looking for to support their research.

"It's difficult when there's so many people of the same name and not knowing which was the correct one."

P7: Phase 1

Service cost

The pay per view credit system for ScotlandsPeople can be expensive for some participants - particularly academic researchers, students and UK pensioners.

"The cost of the certificates is prohibitive, but I can't complain about the cost of the certificates as compared to England or Ireland they are pretty good."

P8: Phase 1

Academic researchers find that the pay per view subscription can be expensive when they have hundreds of returned search results to view or a lot of research to conduct.

Document quality

Some participants have emailed staff to request rescanned documents or to request that they write a transcript of the document to them when the quality of the scan means that they cannot read the information. However not all participants were aware that they could ask for the staff to do this and have used Facebook forums including the Scottish Indexes page to request help in reading documents.

Opportunities

Awareness

Visually link ScotlandsPeople with the other relevant National Records of Scotland web services including Scottish Handwriting and ScotlandsPlaces to help signpost users to other sources of useful information to support their research. ScotlandsPlaces is a site hosted by HES, so consistency is limited, but information is valuable to NRS users and clear signposting or design changes might support engagement and awareness.

Search functionality⁴

Provide support or guidance for new or less experienced users on how to return fewer, search results with accuracy in the records to help identify useful documents more easily.

Users could benefit from being able to save previous searches and records.

Document quality

Communicate that users can request document rescans to improve the usage of that document. Make users aware of the rescan team feedback loop - they upload rescanned documents that have been requested by users to the digital records improving quality of online documents and reducing the volume of future email requests for that document.

⁴ Similarly, a primary focus of the Scotland's Census project has been improving the search functionality for users with varying levels of experience. This finding was also identified in the historic search room research project.

Introduce the option for users to rate a document's quality in terms of its legibility could help to identify documents that need to be rescanned or transcribed to help users read the information that they are looking for.

Online subscription membership model

For new or less experienced users practicing their research skills, a monthly subscription which allows users to view as many documents as they want would be of benefit. It would enable more views of documents and mean that credits aren't considered 'wasted' in users looking at the wrong documents. A subscription model would benefit students, those that find the service expensive, and those that are unable to travel to the centres in Edinburgh. It may also be a useful option during the periods that the ScotlandsPeople Centre is closed, allowing users to access as many documents as they want within a 12-24 hour period using the online service.

"It would be ideal if there was an option for a subscription model where you pay a fixed fee and you can use it as much as you wanted"

P2: Phase 1

"At the moment you are paying per image. And that sort of thing works really well when you are looking at statutory registers. On other sites – the likes of findmypast or ancestry – you just pay a flat subscription fee and can look at as many entries as possible."

P12: Phase 1

Service key findings: Search rooms – Historical and ScotlandsPeople Centre

Based on the 12 participants we spoke to we identified the following findings:

User tasks

- Viewing official, original documents – for example Church records, birth, marriage and death records, wills in confirmation books, Exchequer records
- Viewing documents on a particular historical topic or individual, for example Robert Burns, James IV of Scotland, Piping
- Asking a family member or friend to visit the centre to find a copy of a record

Motivations

- Finding official sources of information to support research
- Noting down information from official records
- Handling official original documents

"It's not quite the same looking at a copy of something on a screen as it is looking at the original volume that the record exists, you see it you handle it. The person who was the census enumerated had written all these things in say 1890, you know, it just makes all the difference, the touch the feel, there's quite a difference in handling it."

P13: Phase 2

Positives

Preparing for a visit

If a user has prepared for their visit and knows what they are looking for they tend to have a positive experience because they find what they are looking for. Some users find more information than they had accounted for and also didn't know they were looking for.

"If you were in the building you could just order records you can see what's there - and figure it out fairly quickly - but if you're planning a trip and trying to shortlist records to look at, the more you can glean from the catalogues then better and more efficient your trip will be"

P2: Phase 1

Engagement with staff

The service provided by NRS staff is deemed to be very helpful. The staff have been helpful in guiding participants with what is available and possible to find. This is helpful because once participants have access to the records that they need they can quickly find the information that they are looking for.

Staff are good at handling expectations and often have an idea of links in the time period that users are researching.

Some participants have emailed in advance to request records which have been found and made available and waiting when the participant arrives at the centre.

In the research rooms, staff are supportive with technical questions from new users, for example, how to use a microfiche or helping with how to decipher Scottish Handwriting.

"That experience was really quick - I got this information and an hour later I'd sorted it out."

P7: Phase 1 (re. viewing their ancestor's records that were ordered ahead at ScotlandsPeople Centre)

"I've looked through books manually and found more information that I didn't know I was looking for."

P3: Phase 1

"Staff have gone out of their way to be helpful."

P5: Phase 2

"I think the archive has always striven to maintain a good level of service. There has been an increasing willingness to be more flexible." ... "We can make that happen."

P4: Super-Users

"Without a strong knowledge of what you're likely to find its very difficult to just plunge in and do the research." [ScotlandsPeople Centre]

P2: Super-Users

Search rooms atmosphere

Most participants described the historical search room as an architecturally beautiful building with a relaxed, friendly and safe working atmosphere. Some participants said that the separation of the Historical Search Rooms and the ScotlandsPeople Centre had a positive impact.

"There's a good working atmosphere. There's a camaraderie there. And if you are quiet enough you can get on with your own work and everything is easy to hand on one floor."

P6: Phase 2

"It's a nice place, the atmosphere is relaxed, friendly and safe. You can leave your stuff lying around [in the ScotlandsPeople centre] and come and go as you please."

P4: Phase 2, talking about feeling of safety

"Generally, it is a calm quiet place to work. It was pretty good to start with."

P4: Super-Users

Pain-points

User journeys and Signposting

Some participants recalled that had their first search room visit was a challenging experience. They said that getting around NRS buildings to find the right thing you are looking for can be difficult due to a lack of signposting and guidance on where to go.

Helping users to find the right records could be improved by users understanding how to find their way around the building and the shelves to know what they are looking for. The process for ordering, using, returning and reordering documents could be clearly stated to users that need the guidance.

As well, assisting users in using resources within the search room to help them view the documents that they need – for example assisting users that don't know how to use the microfiches.

"It can be quite difficult to find your way around the shelves- it's a rabbit warren of a building and you have to know exactly where an item is."

P12: Phase 1

"You have to go to a different part of the centre to find the kirk session records as opposed to the birth/marriage death records."

P2: Phase 1

"A map would have helped, or someone walking me to the right place."

P7: Phase 1

"In many ways it's a bit complicated, you've got to be organised before you go"

P13: Phase 2

"When I first visited it was sheer intimidation, I felt uncomfortable and intimidated. There is also a lot of rules. At the very beginning it was a feeling of not wanting to get into trouble, but it's also very difficult to ask questions because you have to be quiet."

P14: Super-Users

User journeys and Signposting – records access

When users want to access different types of records they need to use separate computers in each of the search rooms in different areas of General Register House and New Register House.

"For example you can look at one set of records on one computer downstairs then have to leave all your belongings and go upstairs to access a different set of records on a different computer."

P9: Phase 1

Searching for records

Less experienced researchers that are learning and practicing their research skills found it difficult to find what they are looking for because it was difficult to narrow their search to a manageable list of possible documents. An unmanageable list can overwhelm users resulting in it being challenging to find the document that they are looking for.

"It is quite an intimidating place to go into if you are not using that sort of place. You just go in the door and say - what do I do, where do I go? If you didn't have a good idea of what you were looking for you ended up with quite an unmanageable list of possible (sic). I was just overwhelmed with information and you just didn't know what to look for."

P13: Phase 1

Document access

Some participants said that only being able to order 12 documents at a time in the Historical Search Room limits the amount of information that they can go through. This is particularly prevalent amongst participants that have travelled to Edinburgh from outside of Edinburgh or overseas. The number of documents that they can review during their day is important because users need to garner as much relevant information as possible for professional purposes.

"There are limitations on the number of items, once you go through those items you then need to wait for the other items to arrive, where you spend a lot of time waiting."

P10: Phase 2

Availability: access to records - Opening hours

Participants that are in full time jobs said that they could not visit the search rooms as regularly as they may like due to the opening hours. Some that were able to visit during their working day said that the opening hours would benefit from being longer because they can review more documents in the time available.

"It's not easy to access original documents for full time workers. I used to do this in school holidays."

P13: Phase 2

"You can only order things until 3:45, whereas they close at 4:30, and it takes half an hour for the process so you really need to be ordering your last things at 3:15. Even moving this to 4:00 would help. Might be more difficult for the staff however."

P14: Super-Users

"I would love to see extended opening hours."

P5: Phase 2

Communication

Some academic researchers and professional historians said that they are impacted by closure of the Historical Search Room. Academic researchers cited that PhD students

The HSR is seen as the only archive that has not reopened in some capacity during the Covid-19 pandemic. Suggestions to improve the situation for these user groups include HSR providing digital scans of documents by email, when it is safe to reopen, there being a time-slot

booking for these user groups.

Opportunities

User journeys and signposting

Integrating services between ScotlandsPeople Centre and the Historical search room so that users understand the links between them.

Providing guidance for first-time and less experienced users to help them to learn how to navigate to the right places within the search rooms and find the documents that they are looking for efficiently either through learning events, guided tours or briefings during visits.

"The use of the word "supervisor" between the floors, different meanings."

P14: Super-Users

Learning events

Educating users and providing guidance on how to search to home in on the relevant document that they are looking for will help to ensure that the number of documents that users are getting in their search results is manageable and not overwhelming. This could be delivered in an online or in-person learning event as an introduction to users before they book to use the search rooms services for the first time.

Ease of use: Digital records access

To save users time allow access to all types of digital records through computers in any of the search rooms – for example BDM and Kirk sessions available to search on the same computer on same floor of the building.

Provide digital copies that could be saved and kept just as printed copies of original documents as a service as participants tend to save electronic records opposed to printed ones.

Opening hours

Increasing opening hours to allow more readers to visit during their working week. Most suggestions were opening until up to 7pm on a weekday evening and on a Saturday to facilitate these readers.

Digital account-based records access

Allow users to login to an account that is accessible both within the search room and away from the search rooms so that they can access and view the same information no matter what their location is.

Community

Help researchers and genealogists to become part of a community that can share knowledge, collaborate and engage with one another both within and outside of the search rooms.

Availability and access to records: Digitisation

Expert users of the services could be a useful community to help support digitisation of records through creating indexes and transcriptions of records. Some participants have taken part in these activities and are actively managing communities of genealogists that would be interested in contributing to the process of digitising records that are currently unavailable online.

Service key findings: ScotlandsPlaces website - scotlandsplaces.gov.uk

The ScotlandsPlaces website is hosted by HES, but is part of NRS' wider network of sites that support their broad user base. Based on the six participants we spoke to we identified the following findings:

User tasks

- To find maps, number of buildings and other places that family members or other persons have lived or worked in
- To view available maprecords
- To read place descriptions for area or dwelling so that there is more context to family history research
- To create course assignment materials
- To find information about a place for an academic or professional research project

Motivations

- To find a place of interest so that participants can provide more context to a family history research project
- To visit the locations that have been identified as part of a trip. This is more relevant for participants who are not from Scotland and do not know the area or geography

"It gives me a bit of context to what I'm researching"

P1: Phase 1

Positives

ScotlandsPlaces is usually used by more experienced professionals because they are researching a wider context of a person or people above and beyond the family tree.

Some participants said that they find the content within the documents that they find interesting to read through which could mean that users spend additional time using the resource because the information that they find of interest triggers other research.

Search function

Participants said that it was fairly easy and quick to find the information that they are looking for using the search function.

"It's quite easy to use in terms of the simple search option of a place name and other ways to approach it to narrow down. Quite straight forward to use"

P2: phase 1

Digitisation

The digitisation of the records is perceived to save participants time in their research to find the documents that they need because they do not need to look through original documents.

For participants, being able to see digital copies of original documents as well as transcripts provides the user with a richer understanding of the information that they are looking at.

"If you were going through an archive manually it would take so much longer to find what you're looking for." "The fact that it's digitised, there are transcriptions, and there's the search and browse is brilliant."

P2: phase 1

Opportunities

Some participants have been told about ScotlandsPlaces through online forums and communities. There may be users that are interested in information on specific places that could benefit from being connected to users with the same place interest.

Signposting

As previously mentioned, signposting users from one service to another, e.g. Scotlands People and Scotlands Places can also increase awareness of other services that may be of interest to other researchers. Most participants became aware of the service through a search engine using specific search terms that led them to a record that they are looking for.

Service key findings: Extract services

Based on the eight participants we spoke to we identified the following findings:

User tasks

- Ordering digital or printed extract copies of specific birth, marriage or death certificate documents to be sent to an address

Motivations

- Having an official copy of a document for interest or to support historical research
- Needing the extract(s) to apply for legal documents including passports or visas

Positives

Most participants doing historical research find the certificates that they are looking for through ScotlandsPeople and then go on to order copies of certificates through Extract services online, if they need or want a copy of a document.

Participants that had ordered documents for their own purposes used a search engine to find the service. Search terms included 'how to get a copy of a birth certificate in Scotland if you're Scottish' and 'how to get your marriage certificate.'

Ordering a certificate

The service is considered very easy to use by participants that consider themselves digitally literate. The information needed for the application process was clear. They found it easy to order extracts using the online form and are confident that they have found the correct document to order.

"I know exactly what to put in [to find the document] so it's very easy."

P13: Phase 1

"I don't think it could have been easier [to order the certificates]"

P8: Phase 1

Turnaround time

Participants were content with turnaround time for receiving certificates. They received their extract within a week or two. There was often time-sensitivity for participants receiving their documents so the turnaround time is an important factor.

"I do remember it arriving a lot quicker than I thought it was going to be, probably about a week or ten days. In my head I thought it would take longer."

P5: Extract Services

Helpfulness of NRS staff

One participant did not feel confident using the online service to order their extract so called NRS for help. They found the telephone call really helpful and said that it made them feel more confident about using the website in future.

"I was really delighted and relieved when I came off the phone"

P7: Extract Services

Pain-points

Perception

One participant said that they did not expect NRS to be so helpful for a personal matter, expecting that they would only have time to support government agencies.

"I went to the website and initially thought 'this isn't for me' but then noticed the mention of birth and death certificates."

P7: Extract Services

Opportunities

Time sensitivity of documents

In cases where users need their documents within a specific time-frame, offering alternative express shipping options at a premium price so that documents can be received more quickly could be of benefit to users.

"If there was an option to have it faster that would have helped hugely. I would have paid for it to rush it along a little."

P8: Extract Services

Service key findings: Scottish Register of Tartans website

Based on the six participants we spoke to we identified the following findings:

User tasks

- Register a personal tartan
- Register a tartan on behalf of someone else
- Compare tartan designs
- Search the register for personal interest to find out more information about tartans that they have seen
- Sharing tartan designs with others for feedback using email for communication
- Find out which other design services exist for comparison
- Search for tartans by a designer's name
- Find out what colours were used for particular tartans in history
- Find out if a tartan is associated with a family name or how many tartans are associated with a name

Motivations

- Designing a unique tartan for memorial purposes
- Register a tartan to ensure its officially recognised
- Search the register for personal interest – e.g. having seen a tartan that they like on TV or at the Scottish Games in San Francisco Bay area
- To find if there is a tartan associated with a family that the user is researching or not.

Positives

Search the register

The search function is very easy to find on the homepage, easy and quick to use to find tartans within the register. The colour selection in the search function on its own provides a list of tartans that match what the participant is looking for

"I think it's very easy to use and very straightforward."

P15: Phase 2

Registration service cost

The cost to register a tartan is considered to be reasonable. Participants perceived this to be to cover the cost of administration and the registration certificate that is posted to them.

Registering a personal tartan

Participants said that the website signposts the information that is required to register a tartan. It is perceived as very easy to register a personal tartan.

"It's pretty straight forward"

P10: Phase 1

NRS Staff engagement

Participants said that when they first started using the service, they received helpful answers from staff to their questions. For example, staff provided links to information about terminology which was unfamiliar to participants when they first started using the service.

Pain-points

Unfamiliar terminology

There is quite a volume of reading on the website initially to understand the rules and language of tartans. Terms like thread count and sett are unfamiliar to new users and those inexperienced with tartan. The term thread count appears in the 'Compare designs' function which could make this more difficult to use.

Search by designer

Using characters with the Designer name field does not return any search results which means that not all designs by a designer may be shown to users.

Colour matching

Participants need to select a best colour match for their tartan from the colours available on the website. This results in the tartan register image being inconsistent with the physical tartan's design colour.

Opportunities

Terminology

Whilst guidance and frequently asked questions are available, new users may not be signposted to these at the start of their visit to the website. Users could be onboarded through the specific task that they want to complete with a guide to terminology and information that will be useful to help them complete their task.

Interactivity in designing tartans

Users being able to interact with a tartan design – for example increasing and reducing the width of the patterns could make the experience more creative and engaging for the users

"Being able to design something interactively I don't know would make it a little more fun, say, you know, let's try this, let's try that."

P15: Phase 1

Service key findings: Scottish Handwriting website

Based on the three participants that we spoke to about this service we identified the following findings:

User tasks

- Using the palaeography poser
- Using the problem solver
- Recommend handwriting tutorials to students

Motivations

- Developing skills in understanding Scottish Handwriting
- Practicing existing skills how to interpret Scottish Handwriting from original and digital historical documents

Positives

- The problem solver and palaeography poser tools give hints and tips
Participants said that the website is useful for helping them with hints and tips to interpret a document correctly
- The website is recommended to students
Tutors point students to the tutorials so that they can learn how to decipher Scottish Handwriting

"I found the Scottish handwriting quite useful looking at some of the older forms of handwriting. Back in the 18th / 19th centuries it was quite different and compared to modern handwriting. You get a lot of contracted words and a

lot of words we no longer use - that is where Scottish handwriting comes in very useful. Just to know what they were and how they were used."

P12: Phase 1

Service key findings: Scottish Archives for Schools website

User tasks

- Finding out information about historical topics of interest e.g. sport in Scottish schools, the timeline of the union
- Finding out information about a Scottish school that users work at for the school archive
- Finding information for lesson planning for the school history curriculum
- Finding sources for teaching Higher History
- Finding original artefacts including photos
- Finding general information for teaching purposes

Motivations

- Understanding how school subjects have developed through history for personal interest
- Planning history lessons to meet new history curriculum standards
- Setting tasks for lessons and projects to engage school children in historical research
- Using information to support a historical research project

Positives

Clarity and understanding

Page layout and navigation is simple and clear

Participants said that the site navigation and page layouts are simple. The limited amount of content on this website contributes to this and makes it easy for users to find the information that they are looking for.

"It was a page that was well set out. Just the right amount of information it wasn't too busy. Seemed to be really well set out."

P2: Phase 2

"There's not very much information there so it's quite quick to click through and see if it's any use to you. There's only about 4-5 different headings"

P3: Phase 2

Pain-points

Limited content topics

Some participants use other resources to supplement their research. For example, P.E. lessons in Edinburgh schools are well documented by public schools, however information on independent schools is limited.

"It's very limited what's in there."

P3: Phase 2

Opportunities

Enhanced rich media formats

Participants said that the information on the website is useful but very static in its format. To engage school children, rich media content types will be required including videos and photos, it is also part of the curriculum for students to use artefacts in their project work.

"Kids have high expectations because they are using technology so much. It needs to be dynamic, interactive learning content on Scottish history – like BBC bitesize."

P9: Phase 2

Increasing topics and content

Participants said that the website would benefit from broadening information topics and content. Some participants found that the topic that they were researching was limited and would benefit from further detail.

Service key findings: Learning events, outreach and exhibitions

User tasks

- Attending a building tour
- Attending a talk or exhibition
- Attending a networking event
- Gathering information from exhibitions

Motivations

- Learning what NRS is and does
- Learning how to use the search rooms and documents
- Professional networking and engagement with NRS
- Using information for teaching students
- Finding out information for personal interest

Positives

- Tours of the search rooms for students

Introducing students to the NRS, search rooms and original document

"It was the highlight of their degree."

P4: Super-users

- Sharing best practice with professional peers in their network
- Talks are informative

Participants said that they learned more information on how to use NRS services, particularly the search rooms after attending a learning event.

"I learned one or two tricks that would be handy to use. It was useful – I could find a lot more info."

P4: Phase 2

Opportunities

- Raise greater awareness of events programmes
Promotion through social media platforms and relevant online listings as well as in the search rooms to raise awareness
- Creating online network forums
To enable to digital preservation and PRSA professionals to regularly ask questions, share practice and knowledge – the information preservers persona
- Creating recorded talks on topics of interest
This would be particularly useful for users that are not based near Edinburgh and unable to attend the programme of events or exhibitions.

Key findings: National Register of Archives Scotland (NRAS)

Based on the two participants that we spoke to about this service we identified the following findings:

User tasks

- Writing a formal letter to gain access to private records
- Checking whether a survey of an archive is complete or not

Motivations

- Carrying out surveys of archives held in private hands, usually business owners, to make recommendations on how to preserve archives usually business owners
- Research for books and articles that feed in to teaching

Positives

- Engagement with NRS staff

Participants said that the two staff that run NRAS are very helpful because they NRAS act as a midpoint between the researcher and the private archive owner.

"It's one of the best things about it"

P16: Super-users

"I put in a lot of applications – maybe over 50. They are just so helpful"

P16: Super-users

Pain-points

Participants said it can be a long-winded process to access some archives, however this is a reflection of the openness of some of the private archive owners opposed to the NRAS service.

Key findings: Awareness and service offering

A user's mental model

The relationship between National Records of Scotland and their different services seemed unclear to many participants, because they said that they did not know much, if anything about the services before they first used them.

"I didn't have specific expectations of how that would work or what that would do"

P2: Phase 1

"Until I used them [NRS websites] I didn't really realise what was available. I probably still don't know half of what's available. It takes a lot of effort to find out what's available."

P3: Phase 1

"I didn't know NRS owned the websites [shown in the footer of nrscotland.gov.uk]."

P1: non-users

"They're Scotland's official record keeping – for many things. Be it for things like statistics or family histories and suchlike."

P2: non-users

"I didn't know a lot. I knew it was the repository for all documents relating to lives, births, marriage and deaths."

P11: Phase 2

"I didn't actually know a great deal really. [Before using nrscotland.gov.uk five years ago]."

P3: Super-users

When asked, many phase 1 user participants were unsure how they found out about the services and some asked whether or not National Library of Scotland is part of the organisation

or not. This suggests that the awareness of which services are under the National Records of Scotland family of services is unclear. The inconsistency in the branding and search functionality across the different websites makes it unclear to users whether or not they are part of the National Records of Scotland brand family and service offering. Similar insights were gained through the Scotland's Census user research.

"I didn't know much about them, a lot of the time it was just recommended to me by people. I wasn't really aware of them."

P1: Phase 1

"Not sure how they all really fit together. Is National Library of Scotland part of your organisation?"

P5: Phase 1

"It [ScotlandsPlaces] must have been advertised somewhere"

P6: Phase 1

"I found out about them through work"

P3: Super-users

"Before I started being a researchers, I was unaware that Scotland had a separate statistics division. I would have thought that ONS covered the whole of the UK."

P5: Super-users

However, a few ways that participants find out about services were highlighted:

- Search engine results:
 - ScotlandsPlaces was found by search results for particular documents, though this site is hosted by HES, users connect it with NRS and find it valuable to their work
 - NRS was found by search results for search terms such as "how to get a copy of a birth certificate in Scotland", "How to get your marriage certificate" or "How to find your relatives"
- ScotlandsPeople tends to be recommended by others in Facebook forums including talkingscot.com
- Those that have studied a masters in Genealogy have been told about the services on their course and learned how to use them for their research projects
- NRS was found through workplaces of super-users

Awareness – potential users

When asked, there were a number of ways that prospective user participants had heard of National Records of Scotland:

- Quoted on social media by the first minister during Covid-19 briefings
- Through family conversations comparing the Covid-19 situation in Scotland and Australia
- From a TV show about ancestry
- Because a parent had worked on their family tree in the past

Understanding of service offering

When asked, potential users that had heard of NRS were asked to describe what NRS do. They were aware of the concept of NRS being an archive of official records that could be accessed and the family history, census, statistics and births and death certificates.

"They're Scotland's official record keeper - for many things. Be it for things like statistics or family histories and suchlike."

P2: Prospective User

"I'd say it's an archive, basically. I think of it as online, but I assume they must have a place, because before now I'd assume there was a room you could go to flick through various things. It's an archive you can access physically or online."

P3: Prospective User

"I would guess that NRS is birth and death certificates and the Census."

P5: Prospective User

Prospective user participants were unaware of any other services that NRS offers and didn't find the list of the other websites in the footer because they didn't scroll to the bottom of the page to see them.

Clarity of information

To novice potential users the navigation labels weren't always clear. However, the quick links on the NRS homepage such as 'family history' provided some clarity. The information on the NRS 'About Us' page also provided an explanation of NRS purpose.

"I think they're clear, but I'm surmising based on what I think it's for. I wouldn't know unless I clicked further into it what that's about."

P4: Prospective User

"[NRS homepage] It's very busy. I wouldn't know what to do."

P2: Prospective User

"It's really busy. I'm not sure where each of the links take you to? Not sure what they mean by record keeping."

P3: Prospective User

Opportunities

Implementing a consistent brand approach to each service that leads the user to recognise and understand that the services are part of the National Records of Scotland family could provide an element of comfort that they are trusted sources. This will also help users to see the relationship between the websites.

"Maybe feels a bit more seamless, moving from NRS service feels like three completely different organisations. There isn't a sense that this is all coming from the same place."

P2: phase 1

Consolidation of services' interfaces

The websites that prospective users were asked to review were:

- NRS website
- Scottish Register of Tartans website
- ScottishHandwriting.com
- ScotlandsPlaces website

Using a modern brand look and feel and consolidating the design patterns on each of the site interfaces they can feel modern and up to date.

Contextual signposting

Due to the vast number of services that NRS offers alone, providing a sign-posted user journey based on what the user is there to do will allow users to access the information they need and the task that they are there to complete. Ask new site visitors "What would you like to do today?" and guide them through the user journey for their particular task to help them to find the information that they need more efficiently.

Standardisation of digital records:

Records, indexing and search functionality could be standardised across all platforms to enable users to better understand how to search on different websites through recognised patterns.

The digitisation of kirk session records as well as a lot more information was requested by most participants. ScotlandsPeople was cited as a really good example of good indexing and complete records making it easy to search.

"It would mean you would know how to search. You would know whether they use sound 'x' - it's easier to search through classifications."

P13: Phase 1

Digitisation of records:

Some participants said that there was an opportunity to use them and their networks to help with the process of digitalisation and transcription to put make more records available online.

"I'd like to see them getting more money to digitise and getting amateurs to transcribe them."

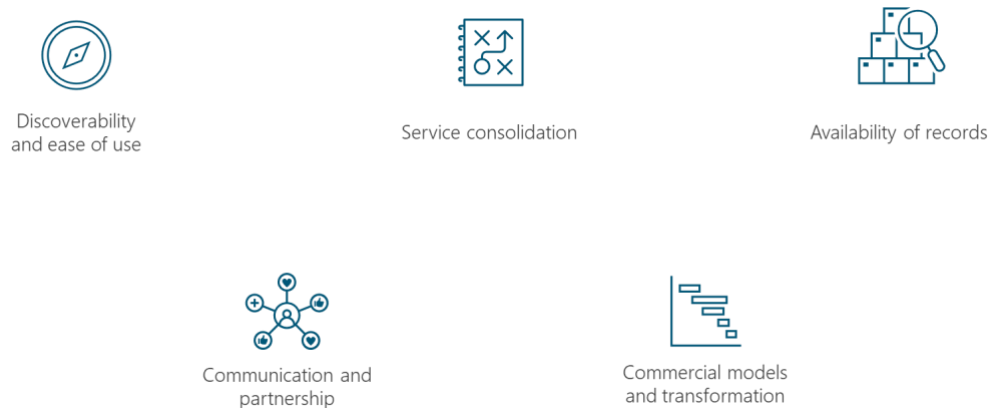
P13: Phase 1

Cross project alignment

The key themes of audience research are based on our learnings from users.



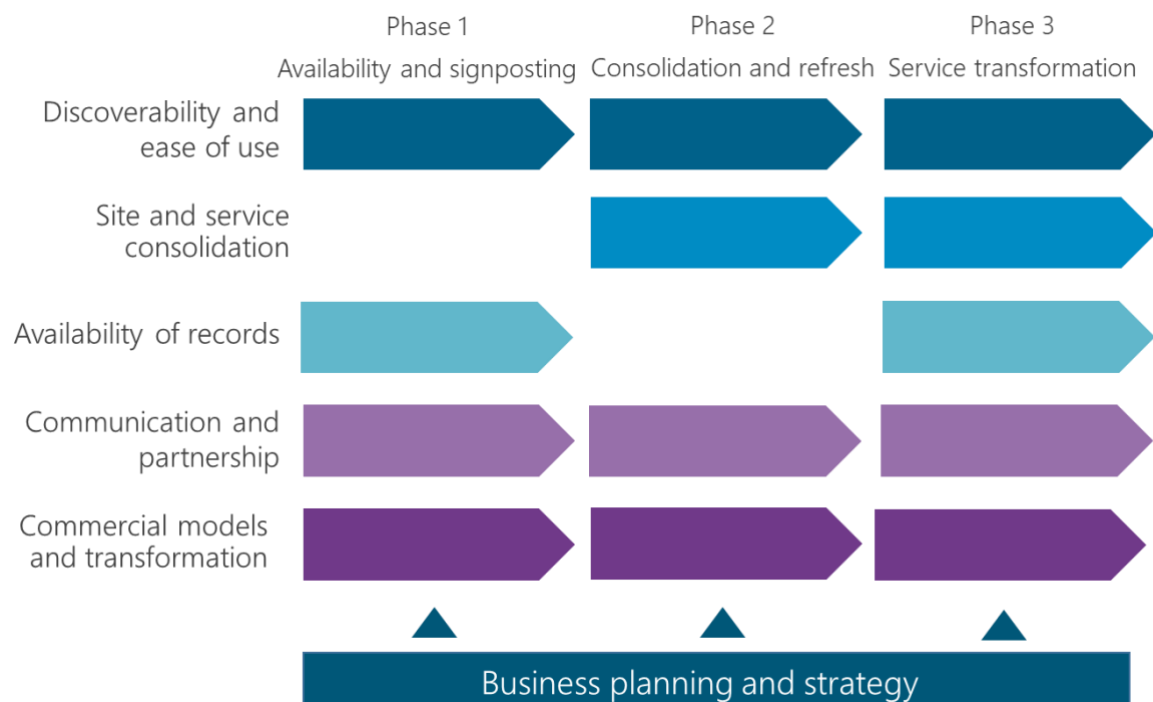
Consolidating these with our work across Census and Historical Search Rooms we were able to identify action themes that would have an impact across these themes and user needs. These are outlined with a focus on the principles of user centred design practices and accessibility.



Roadmap for action themes

Building from users up requires careful planning and technical discovery to make sure services, and audiences, are ready for changes coming through. Particularly with improved accessibility replatforming is essential to ensuring users aren't excluded from services.

An iterative approach, aimed at migrating to new platforms, developing a design system for future use, and releasing new sites and services on a clear schedule will allow audiences to transition through the change.



It is important to add here that changes to commercial models, even if desired, will require legislative change. This must be considered when setting priorities for users.

Discoverability and ease of use

Discoverability is aimed at users prior to and during engagement with NRS, and is an effective action theme through which to address the experience level of users. Though experienced users have developed an understanding of the NRS systems and services, discoverability focuses on making NRS' offering clearer and more impactful for both new and long term users, with contextual signposting, as outlined above, helping guide users through the service.

Similar themes to ease of use, and clarity and understanding, as well as awareness and perception were identified in the Historical Search Rooms work:

- Knowing where to search
- Knowing how to search
- Usability of the search interfaces

As well as, in the audience research and stakeholder engagement, understanding and supporting user expectations as they engage with services.

SEO, content auditing, consistent branding and search enhancements through the use of tools such as Azure Cognitive search will clarify relationships between NRS services. Interfaces across the suite will be empathetic and accessible, and requests sent to NRS will be simple to fulfil for both end users and internal NRS staff.

Work already done on Census has gone some way to understanding how to deliver digital services that encompass the broad spectrum of user needs, from novices to experts. However,

the rest of the NRS services are capturing a broader spectrum of needs, and across services that are co-run with other teams, such as ScotlandsPlaces.

Some examples from the personas create different perspectives of ease of use:

Life Admin

A user who has undergone a life event, such as losing a loved one, or having a loved one in hospital with a need for an extract of their birth certificate, wants to use the service once, find it easy, and to leave with a positive experience. There are many barriers to entry that make the process frustrating and inaccessible. This user can be classified as a 'Life Admins' persona type.

Potential User

A novice potential user persona might look through the services because they're curious. They want to know what's available, but also to set their expectations of what research into their family history might mean in terms of time and practice.

Information Gatherers and Knowledge Sharers

An experienced user wants to be able to perform detailed searches. If there are changes to the service, they expect these to be intuitive and easy to interpret. Changes to digital accounts and supported searching may make these users easiest to distinguish. These personas include experts users such as 'Information publishers', and experienced audiences like 'Information gatherers' and 'Knowledge sharers' personas

Accessibility is also essential to widening the range of users that can engage with NRS from statistics to historical search rooms. Inclusive data and data visualisation is impactful the broad range of NRS users, and creating accessible journeys with clear contextual sign posting will impact users across the spectrum of themes from the research.

Improving discoverability and ease of use will have an impact on user journeys and signposting, engagement with NRS staff, alongside the other audience focused themes.



Service consolidation

In line with Discoverability and Ease of use, is brand consistency and simplifying the service offering. This means replatforming onto tools that can be more supportive of user needs, accessibility, up to date tooling technologies as well as improved analytics, KPIs and continuous improvement.

Service consolidation will improve clarity and understanding, awareness and perception, as well as clearer paths to engagement with NRS staff. There are also opportunities for enhanced

subscription models across the services, that will support researchers looking to broaden their horizons, as well as researchers interested in the specifics of a single service.

The analytics work and engagement with stakeholders have identified services that might work better as tools to support improved user journeys and engagement, such as Scottish Handwriting,

Consolidation also means that focus can be directed to high use areas that are of particular values to users, keeping these as unique offerings that consistently signpost through the rest of the suite, such as Marriage in Scotland and the Registers of Tartans.



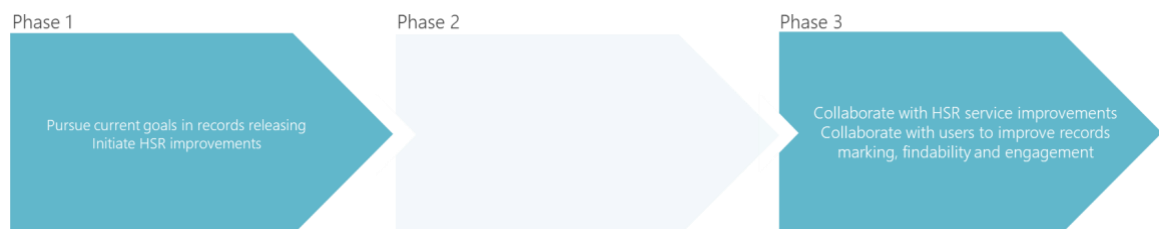
Availability of records

Record availability is ongoing work that is appreciated by NRS users. NRS stakeholders are already aware, and the research confirms, the desire to see and engage with more records online.

Record availability, the plans and the releases, can be communicated clearly to users across the sites and comms strategy. Further, clearer search mechanisms from the site suite through to search rooms will make records easier to find and understand in the short term.

In the longer term, there are opportunities to improve the findability of records and the service consistency between the search rooms and the NRS digital suite, particularly after 2020 has moved a lot of users online who would otherwise have relied on in-person services. The uses of catalogue tagging, applied meta-data, machine learning to facilitate search and categorisation could vastly improve the NRS catalogues without changing the way records are archived.

Further, enabling vetted user contributions back into NRS and into the records, such as improved images, will improve awareness and engagement.



Communication and partnership

Understanding the current NRS audiences can help a identify gaps and opportunities to target communications strategies, improving engagement with NRS staff, awareness and perception.

Currently, many audiences appreciate the personal experience in the search rooms or by email, and the care and diligence given to them by experienced staff.

Careful structuring of straightforward engagements between staff and audiences will free up more time for staff to be able to give that focussed engagement to those who need it, such as simplifying extract requests or legal search rooms requests.

Further, raising awareness of NRS through segmented communications strategies will increase clarity and understanding around the services, as well as generating effective user journeys.

Work in the Census project has highlighted that over 2020 NRS has become known less as a repository for births, deaths and marriages, and more as a cultural and historical archive of modern Scotland, as well as a statistical body that has engaged broader, active audiences.

Further, there are many opportunities to create two-way partnerships between experienced researchers, using the skills and expertise they have developed to engage them more purposefully in developing the SCTS tools.



Commercial Models and transformation

There are many opportunities identified off the back of user and stakeholder research to change or improve commercial modelling around NRS' web suite. With the approaches outlined above, NRS is on the brink of a digital transformation which will vastly improve the user experience for both current and new users.

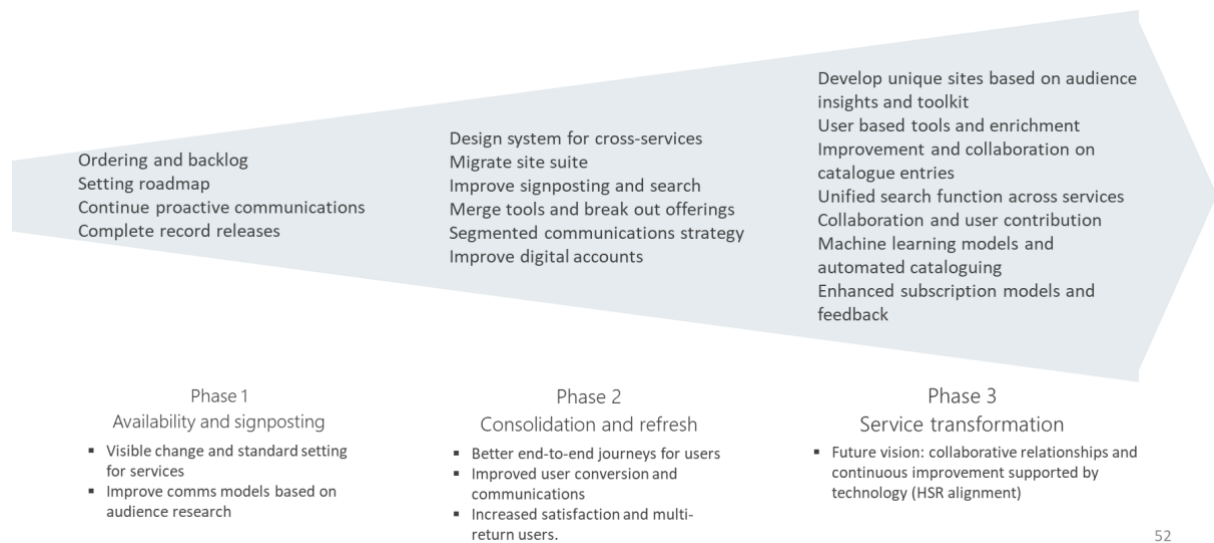
Alongside service consolidation and brand refresh, as well as improving subscription models for users and breaking out unique offerings, there are many areas in which services could be changed. Ease of use, clarity and communication, awareness and perception as well as clear

We would recommend at first a commercial review to understand income patterns, what is eligible for commercial modelling, and what should remain the same.

Business planning and improvement across NRS services on location across HSR and LSR, as well as improvements across the user experience within and without the site suite, will contribute to cross-service, iterative improvements which have strong business cases, while being sustainable, measurable, and accessible to NRS' wide user base.



Suite improvement summary



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Opportunities for NRS

Legal search rooms

Phase 1: Availability and signposting

Discoverability and ease of use

Goal	Enable effective engagement and ordering with legal search rooms now services have shifted online		
Scope	<ul style="list-style-type: none"> Conduct an audit of current systems and requirements Understand current user journeys and identify areas for improvement with a focus on reducing backlog of requests Structure search rooms requests from the site into the team to set clear user expectations and effective prioritisation for the team Establish a set of design patterns / templates / components that can be used elsewhere, particularly for search and ordering. Deploy analytics tools for measuring impact and driving continuous improvement Review the journey from the main NRS website to the search rooms, including content design. 		
Notes	<ul style="list-style-type: none"> A project has been scheduled to define these requirements Migrating virtual volumes to Azure may be brought forward as a requirement and impact scope. The patterns built for the functionality could apply to other registration and ordering services 		
Relations	<ul style="list-style-type: none"> Site and service consolidation (ph.2) Commercial models and transformation (ph. 1) 		

Digital inclusion

Phase 1: Availability and signposting

Discoverability and ease of use

Site and service consolidation

Goal	Inclusive data and data visualisation, accessible interfaces		
Scope	<ul style="list-style-type: none"> Conduct an audit of current systems and requirements Identify key areas for specific inclusive tooling, such as data visualisation and statistics. For improvement and development, conduct accessibility audits at every stage of work, including use of tools such as screen readers and usability testing. Improve usability journeys, conduct content audit and content release strategies 		
Notes	<ul style="list-style-type: none"> This can be completed as an individual project or in line with other improvements Replatforming may improve compatibility with accessibility tools and screen readers 		
Relations	<ul style="list-style-type: none"> Site and service consolidation (ph.2) Design system (ph.2) 		

Proactive communications

Phase 1: Availability and signposting

Discoverability and ease of use

Goal	Shape conversion plans around existing audience groupings and tools		
Scope	<ul style="list-style-type: none"> Use existing channels to tailor communications around audience groups, focus language on what NRS enables users to do, the different tools they can use, and important grouped information. Focus on enablement and topics of interest that encourage interaction rather than 'fire fighting' (as per HSR research). Measure impact and use for ongoing comms strategy 		
Notes	<ul style="list-style-type: none"> COVID-19 has meant NRS' work getting more exposure than previously and NRS are making good use of the opportunity Focus on communications targeted at specific user needs and directing them to key areas of NRS services, mapping conversion rate from media to device. Establish high traction pathways and improve engagement. 		
Relations	<ul style="list-style-type: none"> Segmented communications (Audience, Ph.2) Proactive Communications (HSR, Ph.1) Segmented Communications strategy (HSR, Ph.2) Online access to Virtual Volumes (ph. 2) 		

Extract ordering and SEO

Phase 1: Availability and signposting

Discoverability and ease of use

Goal	Review and refine the process of ordering and receiving extracts	
Scope	<ul style="list-style-type: none"> Review current extract ordering process and refined user needs, review journeys from search to NRS sites to journey completion Use ordering patterns established from LSR to create a clear ordering management service. Refine templates to be used elsewhere Allow one off ordering without registration, and push users to online services. Improve SEO to enable NRS services to appear higher in the google search with clear prompt text Clearer signposting throughout the site, including Azure Cognitive Search to enable advanced site search for these services Deploy analytics tools for measuring impact and driving continuous improvement 	<p>Notes</p> <ul style="list-style-type: none"> Satisfaction is high with the extract ordering service and local authorities, it is lower cost and more efficient than many other services outside of Scotland. But audiences are being pressured into higher prices by third party providers that are SEO optimised and cost more Patterns can be reused across services 24/7 ordering is more audience friendly, particularly for those making request outside normal working hours, but may require changes to current working practices. Extract ordering: servicing the blend between life events and research <p>Relations</p> <ul style="list-style-type: none"> Consolidation and refresh (ph. 2) Legal search rooms (ph. 1)

Scottish Statistics

Phase 1: Availability and signposting

Communication and partnership

Goal	Review statistics in Scotland as a site or clearly available toolkit, or conversion pathways between statistical releases. Reuse some of Census tooling.	
Scope	<ul style="list-style-type: none"> Review customer relationships with statistical releases in more depth, understanding the similarities and differences between Census, statistics and other uses of NRS. Consider statistics-focused information campaigns and collaboration with universities and education institutions. Share information of interest in a digestible and communicable way. Establish toolkits useful for engaging with statistical information and the raw data NRS can provide to its audiences. 	<p>Notes</p> <ul style="list-style-type: none"> Awareness of NRS, which was previously understood mainly as a 'registrations' service, has grown through its statistical impact on COVID-19. NRS is becoming known as a government body that provides official statistics and data. May not require a separate service, but mapping conversion and understanding the relationships between statistical releases, connections with academia and the rest of the services could be very positive for both new and established users. <p>Relations</p> <ul style="list-style-type: none"> Site suite review and migration (ph. 2) Proactive communications (ph. 1)

Historical search rooms

Phase 1: Availability and signposting

Discoverability and ease of use

Goal	Initiate HSR work outlined from the project
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Improve the NRS catalogue		Improve other catalogues / indexes	
		Phase 2: Better journeys	
		Discoverability	
Goal	Improve the usability of the NRS Catalogue for both experienced and occasional users	Goal	Improve the usability of other catalogues or indexes for both experienced and occasional users
Scope	<ul style="list-style-type: none"> Redesign the user interface to better support user journeys, including visual design, general guidance, contextual help and workflows Search, advanced search and browse functions, record pages Introduce quicker and more powerful search functionality based on Azure Cognitive Search (including wildcards, spelling variations and search suggestions) Establish a set of design patterns / templates / components that can be used elsewhere Deploy analytics tools for measuring impact and driving continuous improvement Review the journey from the main NRS website to the NRS catalogue, including content design 	Scope	<ul style="list-style-type: none"> Redesign the user interface, including content design, to better support user journeys Introduce quicker and more powerful search functionality based on Azure Cognitive Search Use the design patterns / templates / components developed for the NRS catalogue Unless there are strong reasons for not doing so, ensure that the catalogue or index can be accessed online
Notes	<ul style="list-style-type: none"> Analytics indicate most used digital significant margin The new interface apply to all versions online / staff, all from the user perspective the most important The actual record would still be different rules 	Notes	<ul style="list-style-type: none"> Potential projects should be evaluated on: <ul style="list-style-type: none"> usability of the current interface similarities with NRS Catalogue level of use (and therefore benefit derived) It shouldn't be taken that all other catalogues and indexes need to be improved, or need to be improved in the same way
Theme	Discoverability	Theme	Discoverability
Relations	Improve other catalogues	Relations	Unified search interface (ph. 3)

Extended site review and analytics

Phase 1: Availability and signposting

Goal	Refine analytics settings across NRS web suite, removing redundant pages or highlighting pages for merge to simplify ongoing work
Scope	<ul style="list-style-type: none"> Install google Tag manager to enable easy tagging, tracking and testing of tracking code, ensure tracking and goal tracking is in place across the estate Undertake further ongoing health check work across the analytics accounts to develop a prioritised roadmap for remedial work in optimising tracking and ensuring compliance with data privacy Conduct review of redundant pages including opportunities to merge and simplify Eliminate and merge redundant pages to focus user attention on top tasks, reducing complexity of navigation structure

Notes	<ul style="list-style-type: none"> Initial improvements to site analytics and tracking will bring NRS into compliance, where lacking Redundant pages can be prioritised in a roadmap for consolidation across the site suite, some sites can be brought within the NRS site This will set the ground work for future improvement and gives a broader stretch of data for improving interfaces
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Relations	<ul style="list-style-type: none"> Improve other catalogues and indexes (ph. 2) Online access to Virtual Volumes (ph. 2)
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Commercial models and transformation

Discoverability and ease of use

Commercial review

Phase 1: Availability and signposting

Goal	Understand where NRS stand from a commercial perspective, what areas can enable change and where restricts grants from Scottish Government
Scope	<ul style="list-style-type: none"> Conduct commercial investigation across NRS site suite, understanding as is service funding alongside recommended areas for improvement Recommended a supported change map that enables enhanced subscription and commercial sponsorship without jeopardising effective government funding and service resilience to financial shocks. Recommend a roadmap alongside further site refresh patterns, enable commercial review for prioritisation and business case or funding application development

Notes	<ul style="list-style-type: none"> There are a lot of opportunities for changing or refreshing subscription and service models for NRS in a way that improves audience services Service sustainability rather than commercialisation is key, looking for ways to reduce costs and improve service, as well as business cases for ongoing improvement
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Relations	<ul style="list-style-type: none"> Registration services (ph.1) Site suite review and migration (ph. 2)
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Commercial modelling and transformation

Registration services

Phase 1: Availability and signposting

Goal	Review registration services and break out those of a unique nature
Scope	<ul style="list-style-type: none"> Research with audiences to understand which services can be grouped and which can be broken out Review audience journeys against business needs, establish key KPIs and improvements Build service-specific journeys for long-planning registrations i.e. marriage or name changes vs short ones, such as registering a death. Establish empathetic design practices around specifically difficult registrations, making them easy to find and use. Introduce quicker and more powerful search functionality based on Azure Cognitive Search (including wildcards, spelling variations and search suggestions)

Notes	<ul style="list-style-type: none"> Marriage information is consistent and returnable, and particularly of urgency and interest as services resume post covid. A site specifically around marriages in Scotland would be clean and easy to use, as well as a potential revenue source Empathetic design practices are clean and accessible for users going through a significant life event. Findability and expectation setting is key
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Relations	<ul style="list-style-type: none"> Extract ordering and SEO (ph. 1) Site suite review and migration (ph. 2)
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Discoverability and ease of use

Commercial modelling and transformation

Segmented comms strategy

Phase 2: Consolidation and refresh

Communication and partnership

Goal	Strengthen relationships with specific user groups using tailored communication strategies.	
Scope	<ul style="list-style-type: none"> Focus on particular user groups and conversion pathways for encouraging engagement. Develop further understanding of hard-to-reach Scottish communities to up record intake, archiving and engagement. Sporting communities, diaspora, areas of interest. Establish community and engagement patterns Pick up on news and engagement trends as well as understanding user needs. <ul style="list-style-type: none"> Experienced users (differentiated by user type) <ul style="list-style-type: none"> New services / functionality Collaboration Status Knowledge transfer New users <ul style="list-style-type: none"> Mentoring / training Confidence building (to continue) Potential users <ul style="list-style-type: none"> Engagement / encouragement Confidence building (to start) 	<p>Notes</p> <ul style="list-style-type: none"> This is a good opportunity to collaborate with other researchers using NRS records and highlight statistics-based engagement in the aftermath of COVID-19. Focus on communications targeted at specific user needs and directing them to key areas of NRS services, mapping conversion rate from media to device. Establish high traction pathways and improve engagement. <p>Relations</p> <ul style="list-style-type: none"> Proactive communications, (audience, ph1) Outreach and community engagement (ph.3) Proactive Communications (HSR, Ph.1) Segmented Communications strategy (HSR, Ph.2)

Outreach and partnership

Phase 2: Consolidation and refresh

Communication and partnership

Goal	Optimise engagement with archivists through outreach modelling and comms strategy	
Scope	<ul style="list-style-type: none"> Encourage more active engagement and Q and A from archive holders, private and public Develop comms campaigns based on increasing information from extended communities i.e. diaspora in Scotland, Scottish sports clubs, Scottish political clubs Mentor and train users in engaging with 'lost' archives, such as those related to women in Scotland or diasporic communities outside of Scotland Engage with Scottish communities around the world, establish an understanding of the forums in use and whether improved forums or comms strategy could build up Scottish communities and engagement with the cultural archive repository. 	<p>Notes</p> <ul style="list-style-type: none"> The archives are not lost, but are potentially hidden within the catalogues. Concerted and publicised efforts can continue to be made from NRS, especially off the back of changing statistics from Census. Focus on inclusive language and recognition of audience groups that are not as involved with Scottish records. Communicate NRS' continued relevance to modern Scottish lives and communities, including school age outreach. <p>Relations</p> <ul style="list-style-type: none"> Proactive communications, (ph.1) Segmented communications strategy (ph.2) Outreach and community engagement (ph.3)

Site suite review and migration

Phase 2: Consolidation and refresh

Site and service consolidation

Commercial modelling and transformation

Goal	Migrate sites to more effective services, initiate review of full NRS site suite in line with other projects and audience work.	
Scope	<ul style="list-style-type: none"> Migrate the sites suite onto Microsoft Azure framework with traffic-based charges. Introduce quicker and more powerful search functionality based on Azure Cognitive Search (including wildcards, spelling variations and search suggestions) Merge or remove sites that are better situated elsewhere. Identify sites for solo Redesign the user interfaces to better support user journeys, including visual design, general guidance, contextual help and workflows Initiate design system usage for core sites with active SME engagement from site owners i.e. SAFS Develop content and release strategy for ongoing work based on continuous improvement. Introduce quicker and more powerful search functionality based on Azure Cognitive Search across the suite. 	<p>Notes</p> <ul style="list-style-type: none"> Key brand guidelines for the interface can be established and consistent across the NRS suite to enable recognition Sites for merging can include <ul style="list-style-type: none"> Scottish Handwriting and NRS Scotland's People and Places Scottish Archive Network and NRS Aligned with improvements to the search rooms interfaces, as well as releases of new digitised information Consistent architecture and design with accessibility and user journeys in mind <p>Relations</p> <ul style="list-style-type: none"> Consolidation and refresh (ph.2) Online access to Virtual Volumes (ph. 2 (HSR))

SEO based on census outputs

Phase 2: Consolidation and refresh

Communication and partnership

Goal	SEO established across the NRS suite to optimise service presence in search engines		
Scope	<ul style="list-style-type: none"> Conduct SEO compliance audit and perform comprehensive keyword research across the services and competitors Align target keywords to specific site page, and develop an action plan according to performance and client targets Make recommendations based on security, page speed and competitors. Content optimisation and new content designed in line with the design system and use guidelines Schedule performance monitoring and review pattern 	Notes	<ul style="list-style-type: none"> Search engines should be considered the front page of services. SEO along with site refresh and comms strategy should improve awareness and perception. Improved signposting from the main site and across the NRS suite will improve task performance and conversion Ability to engage new audiences who may not have previously recognised NRS' work and services.
		Relations	<ul style="list-style-type: none"> Site suite review and migration (ph.2) Design system and library (ph.2) Market review and brand guidelines (ph.2)

Structured user journeys

Phase 3: Service transformation

Communication and partnership

Discoverability and ease of use

Goal	Shaping journeys from comms strategy to in-site conversion and competency		
Scope	<ul style="list-style-type: none"> Identify key opportunities for engagement and improvement Hone IA against the timeline of user conversion, create content aimed at preparing users for NRS engagement and what NRS can do Integration with common user tools to allow marking, logging and returning to records. Establish consistent updates and newsletters newsletter comms strategy, build up Scottish diaspora and diaspora within Scotland Deploy analytics tools for measuring impact and driving continuous improvement Review the journey from the main NRS website to the NRS catalogue, including content design 	Notes	<ul style="list-style-type: none"> Extensive communications mapping against predicted and desired user journeys Use analytics tooling from Phase 1 and 2 to create more effective journeys in line with analytics models and new services Build up timeline and step support from first interest to using updated catalogue services Measure and improve on user flow for continuous improvement
		Relations	<ul style="list-style-type: none"> Design system and library (ph. 2) Site suite review and migration (ph. 2) Connection to HSR work

Tooling of merged services

Phase 2: consolidation and refresh

Site and service consolidation

Goal	Some sites have low traffic, but still remain useful enablers tools, particularly for users who are new to NRS.		
Scope	<ul style="list-style-type: none"> Structure findability of tools based on site architecture and user patterns Redesign toolsets, particularly Scottish Handwriting Test tool use with new and established users, understand their effectiveness and compatibility with improved audience engagement i.e. a more gamified service or a simple and straightforward service. Introduce quicker and more powerful search functionality based on Azure Cognitive Search (including wildcards, spelling variations and search suggestions) Establish a set of design patterns / templates / components that can be used elsewhere Deploy analytics tools for measuring impact and driving continuous improvement 	Notes	<ul style="list-style-type: none"> Scottish Handwriting in particular, as well as the Tartan Register search or patterns development are tools that either can be merged or are already, these need redesign based on user needs and expectations – microsite, content management and governance Some users, particularly those who are new to the records, find these tools to be interesting and useful, losing them might not have a positive effect.
		Relations	<ul style="list-style-type: none"> Improve other catalogues and indexes (ph. 2) Online access to Virtual Volumes (ph. 2)

Scotland's People and Places

Phase 3: Service transformation

Site and service consolidation

Commercial modelling and transformation

Goal	Create a holistic service aimed at enriching Scotland's People with places, without compromising relationships with HES		
Scope	<ul style="list-style-type: none"> Review capabilities to include more places information in Scotland's People, look at improving the tooling and the contextual signposting across the services. Create a consistent, holistic service aimed at guiding users who are first engaging with NRS through its more commercial arms Build on established design patterns and branding, keep user journeys consistent and content guidelines in line. Deploy analytics tools for measuring impact and driving continuous improvement 		
Notes	<ul style="list-style-type: none"> Places is a natural enrichment of Scotland's People, particularly with the introduction of Kirk Session Records, but not at the expense of the relationship with HES. Consistent, recognisable naming and branding Tooling of Scotland's Places service and integration with People findings 		
Relations	<ul style="list-style-type: none"> Site suite review and migration (ph. 2) Segmented comms strategy (ph.2) 		

Weddings in Scotland

Phase 3: Service transformation

Commercial modelling and transformation

Goal	Cater for positive return users and commercialise some of the weddings process		
Scope	<ul style="list-style-type: none"> Conduct discovery across wedding services and wedding registrations users, including the internal impact of wedding-based queries. Create wedding service and toolkit that directs users through their checklist and registrations service Signpost to related services across the NRS suite, such as People and Places. 		
Notes	<ul style="list-style-type: none"> Weddings users for registrations could be repeat returners within a certain timeframes Scottish wedding locations or connections with registrations archives could be an interesting output, while providing necessary information and services Commercial engagement with sponsoring parties wanting advertisement could provide revenue 		
Relations	<ul style="list-style-type: none"> Improve other catalogues and indexes (ph. 2) Online access to Virtual Volumes (ph. 2) 		

Scottish Tartans

Phase 2: Consolidation and refresh

Awareness and perception

Goal	Refresh Scottish Tartans site and toolkit in line with design system and library		
Scope	<ul style="list-style-type: none"> Conduct specific discovery and co-design sessions with tartan users, and align with a communications campaign to improve tartans following Redesign the user interface to better support user journeys and updated search functions and service related imagery Clearer signposting and pointers to other NRS services as well as professional external services i.e. tartan makers Deploy analytics tools for measuring impact and driving continuous improvement Consistent, directive communications and guidelines 		
Notes	<ul style="list-style-type: none"> The Register of Tartans sites comfortably as its own site with a specific set of queries to cater for and complete. It could expand into more of a cultural repository for casual or first time users looking to engage with their own or broader Scottish history. Comms strategy could be based around peaks of interest in Scotland, such as Scottish based programming or famous figures with a broader reach across a more shareable service. 		
Relations	<ul style="list-style-type: none"> Site suite review and migration (ph.2) Design system and library (ph.2) Segmented communications strategy (ph.2) 		

Improved subscription

Phase 2: Consolidation and refresh

Communication and partnership

Commercial models and transformation

Goal	Digital accounts functionality and tailored subscription models
Scope	<ul style="list-style-type: none"> Review digital accounts users and improve functionality in line with HSR recommendations Enable registration as an entirely digital event, with reader cards posted in advance if requested. Review current models against audience types with access needs <ul style="list-style-type: none"> Primarily remote users Students Older users Allow increased access based on subscription fees, allowing for marking and storing multiple records. Set up recurring billing workflow

Notes	<ul style="list-style-type: none"> New subscription models would be more flexible for one off audiences versus return users Subscription based models are dependent on the commercial review and what is viable with NRS' current funding packages Will engage wider audiences with effective discounts for multiple records Improving the digital accounts and giving access to more tools will drive consistent engagement.
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Relations	<ul style="list-style-type: none"> Commercial review (ph.1) Extend the functionality with digital accounts (HSR, ph. 2)
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Collaboration and community

Phase 3: Service transformation

Availability of records

Communication and partnership

Commercial modelling and transformation

Goal	Facilitate richer, more collaborative, two-way relationships between the NRS and the public, with a particular focus on catalogue and search improvement using Azure services.
Scope	<ul style="list-style-type: none"> Through its services and tools, the HSR supports people to explore the archives, contribute to the archives, collaborate with each other, share knowledge and develop communities of practice <ul style="list-style-type: none"> Users able to improve the archives Users able to make connections with other researchers looking at a similar topics Community forums Expert advice / support Practical training Enable users to add metadata to the records to make them more searchable. Enable machine learning models to improve categorisation

Notes	<ul style="list-style-type: none"> This is directly related to HSR findings, and is validated through stakeholder and wider audience engagement. Changes include: widening community scope to establish and involve local and virtual communities. Opportunities to partner with other services and share best practices. Make good habits out of frustrating habits i.e. 'photobombing', or rewards out of good habits, such as pointing out flawed record copies.
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Relations	<ul style="list-style-type: none"> Collaboration and community (HSR ph3) Vetted contributors (HSR ph. 3) Meeting SG national outcomes (HSR ph. 3)
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Appendix: Participant tables

Phase 1 Participants

We conducted one-to-one online interviews with 13 participants using Microsoft Teams. Most of the participants had used more than one NRS service. The number of participants that we spoke to for each service was:

- Six participants - National Records of Scotland website - nrscotland.gov.uk
- Seven participants - ScotlandsPeople website and ScotlandsPeople Centre - scotlandspeople.gov.uk
- Six participants - ScotlandsPlaces website - scotlandsplaces.gov.uk
- Three participants - Extract services - New Register House, Edinburgh
- Three participants - The Scottish Register of Tartans website - tartanregister.gov.uk

Participant	Age range	Gender	Education level	Country of residence	Employment status	NRS services used
P1	45-54	Female	Master's Degree	England	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • ScotlandsPlaces website - scotlandsplaces.gov.uk • ScotlandsPeople website - scotlandspeople.gov.uk • Scottish Handwriting website - scottishhandwriting.com • National Records of Scotland website - nrscotland.gov.uk; • Public talk, exhibition, learning event • Extract services
P2	35-44	Female	Bachelor's Degree	Northern Ireland	Student – Postgrad	<ul style="list-style-type: none"> • ScotlandsPeople website - scotlandspeople.gov.uk • The Scottish Register of Tartans website - tartanregister.gov.uk • National Records of Scotland website - nrscotland.gov.uk • ScotlandsPlaces website - scotlandsplaces.gov.uk
P3	45-54	Male	Bachelor's Degree	Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • ScotlandsPeople website - scotlandspeople.gov.uk • ScotlandsPlaces website - scotlandsplaces.gov.uk • ScotlandsPeople Centre - Edinburgh

P4	25-34	Male	AS/A-Level or Highers	Scotland	Student – Undergrad	<ul style="list-style-type: none"> National Record of Scotland website
P5	55-64	Female	Master's Degree	USA	Employed / Self-employed– Part time	<ul style="list-style-type: none"> ScotlandsPeople website - scotlandspeople.gov.uk National Records of Scotland website - nrscotland.gov.uk
P6	65-74	Female	HND/HNC	Australia	Volunteer/ Unpaid work	<ul style="list-style-type: none"> Extract services Scottish Archive Network website - www.scan.org.uk National Records of Scotland website - nrscotland.gov.uk ScotlandsPeople website - scotlandspeople.gov.uk
P7	45-54	Female	Bachelor's Degree	Australia	Employed / Self-employed – Full time	<ul style="list-style-type: none"> ScotlandsPeople website - scotlandspeople.gov.uk
P8	65-74	Female	Bachelor's Degree	England	Retired	<ul style="list-style-type: none"> National Records of Scotland website - nrscotland.gov.uk Extract services - New Register House, Edinburgh ScotlandsPeople website - scotlandspeople.gov.uk
P9	45-54	Male	Master's Degree	Scotland	Employed / Self-employed– Part time	<ul style="list-style-type: none"> ScotlandsPlaces website - scotlandsplaces.gov.uk Legal Search Room - General Register House, Edinburgh Public talk, exhibition or learning event Scottish Archives for Schools website - scottisharchivesforschools.org Scottish Archive Network website - www.scan.org.uk ScotlandsPeople Centre – Edinburgh National Records of Scotland website - nrscotland.gov.uk ScotlandsPeople website - scotlandspeople.gov.uk
P10	45-54	Male	Bachelor's Degree	USA	Employed / Self-employed – Full time	<ul style="list-style-type: none"> The Scottish Register of Tartans website - tartanregister.gov.uk

P11	65-74	Male	HND/HNC	Scotland	Retired	<ul style="list-style-type: none"> • National Records of Scotland website - nrscotland.gov.uk • Extract services - New Register House, Edinburgh • Archivists' Garden, Edinburgh • Public talk, exhibition or learning event • ScotlandsPeople Centre – Edinburgh • Scottish Handwriting website - scottishhandwriting.com, • ScotlandsPlaces website - scotlandspplaces.gov.uk • ScotlandsPeople website - scotlandsppeople.gov.uk
P12	55-64	Female	Bachelor's Degree	Scotland	Retired	<ul style="list-style-type: none"> • National Records of Scotland website - nrscotland.gov.uk • Scotland Census • ScotlandsPlaces website - scotlandspplaces.gov.uk • ScotlandsPeople website - scotlandsppeople.gov.uk
P13	55-64	Male	Bachelor's Degree	USA	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • The Scottish Register of Tartans website - tartanregister.gov.uk

Phase 2 Participants

The number of participants that had used each of the services:

- Two participants: National Records of Scotland website - nrsotland.gov.uk (Historical enquiry)
- Three participants: Scottish Archives for Schools - scottisharchivesforschools.org
- Two participants: Scottish Handwriting website - scottishhandwriting.com
- Three participants: The Scottish Register of Tartans website - tartanregister.gov.uk
- Four participants: Learning events, public talk or exhibition
- Five participants: Historical Search Room - General Register House, Edinburgh
- Two participants: Local family history centres / ScotlandsPeople Centre – Edinburgh
- Two participants: Non-users
- Five participants: Extract services

Participant	Age range	Gender	Education level	Country of residence	Employment status	NRS services used
P2	45-54	Male	Bachelor's Degree	Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Scottish Archives for Schools website - scottisharchivesforschools.org • The Scottish Register of Tartans website - tartanregister.gov.uk
P3	55-64	Female	Master's Degree	Scotland	Retired	<ul style="list-style-type: none"> • Scottish Archives for Schools website - scottisharchivesforschools.org • National Records of Scotland website - nrsotland.gov.uk • Scottish Archive Network website - www.scan.org.uk, • ScotlandsPeople website - scotlandspeople.gov.uk
P4	55-64	Female	AS/A-Level or Scottish Highers	Scotland	Retired	<ul style="list-style-type: none"> • Historical Search Room - General Register House, Edinburgh, • Public talk, exhibition or learning event, • Archivists' Garden, Edinburgh, • ScotlandsPeople website - scotlandspeople.gov.uk
P5	55-64	Female	PhD/DPhil or Doctorate	Canada	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Public talk, exhibition or learning event • Historical Search Room - General Register House, Edinburgh • Scottish Handwriting website - scottishhandwriting.com,

						<ul style="list-style-type: none"> • ScotlandsPlaces website - scotlandsplaces.gov.uk • ScotlandsPeople website - scotlandspeople.gov.uk • National Records of Scotland website - nrsotland.gov.uk • Archivists' Garden, Edinburgh • Scottish Archive Network website - www.scan.org.uk
P6	55-64	Male	AS/A-Level or Scottish Highers	England	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Public talk, exhibition or learning event
P7	45-54	Female	AS/A-Level or Scottish Highers	Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Public talk, exhibition or learning event • National Records of Scotland website - nrsotland.gov.uk
P8	55-64	Male	College	Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Historical Search Room - General Register House, Edinburgh • ScotlandsPeople website - scotlandspeople.gov.uk • National Records of Scotland website - nrsotland.gov.uk • Extract services • The Scottish Register of Tartans website - tartanregister.gov.uk
P9	35-44	Male	Bachelor's Degree	Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Scottish Archives for Schools website - scottisharchivesforschools.org • Scottish Archive Network website - www.scan.org.uk • ScotlandsPeople website - scotlandspeople.gov.uk • National Records of Scotland website - nrsotland.gov.uk • ScotlandsPlaces website - scotlandsplaces.gov.uk • Scotland Census website - scotlandscensus.gov.uk
P10	45-54	Female	Master's Degree	Canada	Employed / Self-employed – Part time	<ul style="list-style-type: none"> • Scottish Handwriting website - scottishhandwriting.com • Historical Search Room - General Register House, Edinburgh • Scottish Archive Network website - www.scan.org.uk

						<ul style="list-style-type: none"> National Records of Scotland website - nrsotland.gov.uk ScotlandsPlaces website - scotlandsplaces.gov.uk ScotlandsPeople Centre - Edinburgh ScotlandsPeople website - scotlandspeople.gov.uk
P11	25-34	Female	Master's Degree	Australia	Student / Employed / Self-employed – Part time	<ul style="list-style-type: none"> Hasn't used any NRS services
P12	55-64	Male	AS/A-Level or Scottish Highers	Scotland	Volunteer/ Unpaid work	<ul style="list-style-type: none"> Hasn't used any NRS services
P13	45-54	Female	PhD/DPhil or Doctorate	Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Public talk, exhibition or learning event Scottish Handwriting website - scottishhandwriting.com ScotlandsPeople website - scotlandspeople.gov.uk Scotland Census website - scotlandscensus.gov.uk Scottish Archive Network website - www.scan.org.uk National Records of Scotland website - nrsotland.gov.uk ScotlandsPlaces website - scotlandsplaces.gov.uk
P14	25-34	Female	Bachelor's Degree	England	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Hasn't used any NRS services
P15	35-44	Female	PhD/DPhil or Doctorate	England	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Hasn't used any NRS services
P16	35-44	Male	N/A	Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Hasn't used any NRS services
P17	25-34	Female		Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Extract services
P18	55-64	Male		England	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Extract services

P19	45-54	Female		England	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Extract services
P20	55-64	Female		Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Extract services
P21	25-34	Female		Scotland	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Extract services

Phase 3 Participants

Number of participants per service

- Six participants: National Records of Scotland website - nrscotland.gov.uk (Statistics & data)
- One participant: National Records of Scotland website - nrscotland.gov.uk (Record Keeping)
- Three participants: National Records of Scotland website - nrscotland.gov.uk (Historical enquiry)
- Two participants: National Register of Archives for Scotland
- Three participants: ScotlandsPeople website - scotlandspeople.gov.uk
- One participant: Local family history centres / ScotlandsPeople Centre - Edinburgh
- Five participants: Historical Search Room - General Register House, Edinburgh
- Two participants: Learning events, public talk or exhibition

Participant	Age range	Gender	Education level	Employment status	NRS services used
P1	55-64	Female	PhD/DPhil or Doctorate	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Scottish Archive Network website - www.scan.org.uk • National Records of Scotland website - nrscotland.gov.uk
P2	45-54	Female	Master's degree	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Public talk, exhibition or learning event • Scottish Archive Network website - www.scan.org.uk • Scottish Handwriting website - scottishhandwriting.com • ScotlandsPlaces website - scotlandsplaces.gov.uk • National Records of Scotland website - nrscotland.gov.uk • ScotlandsPeople website - scotlandspeople.gov.uk • Extract services - New Register House, Edinburgh • Scotland Census website - scotlandscensus.gov.uk • Historical Search Room - General Register House, Edinburgh • Extract services - e.g. ordering a certificate;

P3	35-44	Female	Master's degree	Employed / Self-employed – Part time	<ul style="list-style-type: none"> National Records of Scotland website - nrscotland.gov.uk;
P4	35-44	Female	PhD/DPhil or Doctorate	Employed / Self-employed – Full time	<ul style="list-style-type: none"> ScotlandsPeople website - scotlandspeople.gov.uk Archivists' Garden, Edinburgh Scottish Handwriting website - scottishhandwriting.com Historical Search Room - General Register House, Edinburgh ScotlandsPlaces website - scotlandsplaces.gov.uk Scottish Archive Network website - www.scan.org.uk National Records of Scotland website - nrscotland.gov.uk
P5	35-44	Male	Master's Degree	Employed / Self-employed – Full time	<ul style="list-style-type: none"> National Records of Scotland website - nrscotland.gov.uk;
P6	45-54	Male	PhD/DPhil or Doctorate	Employed / Self-employed – Full time	<ul style="list-style-type: none"> Public talk, exhibition or learning event
P7	55-64	Male	Bachelor's Degree	Employed / Self-employed – Full time	<ul style="list-style-type: none"> National Records of Scotland website - nrscotland.gov.uk
P8	75+	Male	Bachelor's Degree	Retired	<ul style="list-style-type: none"> Historical Search Room - General Register House, Edinburgh National Records of Scotland website - nrscotland.gov.uk Scotland Census website - scotlandscensus.gov.uk ScotlandsPeople Centre – Edinburgh ScotlandsPlaces website - scotlandsplaces.gov.uk ScotlandsPeople website - scotlandspeople.gov.uk Scottish Archive Network website - www.scan.org.uk Legal Search Room - General Register House, Edinburgh;

P9	18-24	Prefer not to say	Master's Degree	Student - postgraduate	<ul style="list-style-type: none"> National Records of Scotland website - nrscotland.gov.uk Scotland Census website - scotlandscensus.gov.uk
P10	75+	Male	Master's Degree	Employed / Self-employed – Full time	<ul style="list-style-type: none"> National Records of Scotland website - nrscotland.gov.uk Scotland Census website - scotlandscensus.gov.uk
P11	35-44	Female	GCSE/ Standard grade	Employed / Self-employed – Full time	<ul style="list-style-type: none"> ScotlandsPlaces website - scotlandsplaces.gov.uk National Records of Scotland website - nrscotland.gov.uk Scottish Handwriting website - scottishhandwriting.com Scottish Archive Network website - www.scan.org.uk Historical Search Room - General Register House, Edinburgh ScotlandsPeople website - scotlandspeople.gov.uk Extract services - New Register House, Edinburgh Public talk, exhibition or learning event
P12	45-54	Female	PhD/DPhil or Doctorate	Employed / Self-employed – Full time	<ul style="list-style-type: none"> National Records of Scotland website - nrscotland.gov.uk Scotland Census website - scotlandscensus.gov.uk
P13	45-54	Female	PhD/DPhil or Doctorate	Employed / Self-employed – Full time	<ul style="list-style-type: none"> National Records of Scotland website - nrscotland.gov.uk; Historical Search Room - General Register House, Edinburgh Scottish Archive Network website - www.scan.org.uk
P14	45-54	Male	Bachelor's degree	Employed / Self-employed – Part time	<ul style="list-style-type: none"> ScotlandsPeople Centre – Edinburgh Legal Search Room - General Register House, Edinburgh Scottish Archive Network website - www.scan.org.uk Historical Search Room - General Register House, Edinburgh

					<ul style="list-style-type: none"> • National Records of Scotland website - nrscotland.gov.uk • Public talk, exhibition or learning event; ScotlandsPeople website - scotlandspeople.gov.uk • Archivists' Garden, Edinburgh • ScotlandsPlaces website - scotlandsplaces.gov.uk • Scotland Census website - scotlandscensus.gov.uk
P15	25-34	Male	PhD/DPhil or Doctorate	Employed / Self-employed – Full time	<ul style="list-style-type: none"> • Historical Search Room - General Register House, Edinburgh • ScotlandsPeople website - scotlandspeople.gov.uk • National Records of Scotland website - nrscotland.gov.uk • Scottish Archive Network website - www.scan.org.uk;