

# Genes Reunited and Brightsolid Inquiry

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**Note: Due to commercial sensitivity, many of the figures in this report, and some statements, have been redacted. A ✂ symbol has been used in such cases.**

## 1. Executive summary

### 1.1 Background

- Harris Interactive was commissioned by the Competition Commission to undertake a market research study amongst users of the Findmypast and Genes Reunited family history websites to understand who is using such sites, why they are utilising them and their experiences of using such sites. The research was centred around a quantitative online survey with 3,080 registered users of Genes Reunited and Findmypast, backed up by qualitative telephone depth interviews with 20 users of the two sites.

### 1.2 Typical user profile

- The market for family history website services – based on Genes Reunited and Findmypast users – is an older market in terms of age profile (✂% of all users are 55 plus ; ✂% of all users are retired).
- Users tend to be experienced and committed to their research, typically having at least three years experience of using such sites (✂%) and logging on to such sites at least once a week (✂% do so). It's also a market where users tend to interact with one another, with 53% having offered help or advice to other users of family history sites.
- Very few users make use of only one family history website (✂% of Findmypast and ✂% of Genes Reunited users), with the average user having made use of four different sites within the past twelve months.
- There is a high level of overlap in site usage between Findmypast (FMP) and Genes Reunited (GR)
  - ✂% of all FMP and ✂% of all GR users make use of the other site (either for free or a fee)
  - Amongst those that pay for services, a substantial proportion of GR customers also pay to use services from FMP and vice versa (between ✂% to ✂%, depending upon the user group).

### 1.3 Usage of, and expenditure on, the two sites

- Both the quantitative and qualitative research programs revealed there to be a fundamental difference in the services that Genes Reunited and Findmypast Subscription users typically have access to and make use of:
  - **Genes Reunited:** A more social site, where interactivity / networking with other site users is key (searching, matching and sharing information).

- **Findmypast:** A site where users go to access official historical records (rather than share information with other users).

This difference is best illustrated by looking at the two sites' Subscription customers – less than 20% of Genes Reunited Subscription users have a subscription that allows them access to official historical record, whereas all Findmypast Subscription users, by default, have access to official historical records.

- The difference in the services typically accessed by users of the two sites (i.e. the functionality of the two sites) is reflected in...
  - **The reasons for choosing each of the sites:** Findmypast users typically choose to use Findmypast simply to search for a particular set of record(s) / particular person(s). For Genes Reunited users, factors relating to the site's user interaction capabilities come into play as being key (alongside searching for a particular person).
  - **The areas in which the sites outperform one another on user satisfaction:** Findmypast tends to outscore Genes Reunited on factors relating to volume and depth of data, whereas Genes Reunited notably outscores Findmypast on areas relating to the social aspects of the site.
  - **User spend of the sites:** Findmypast Subscription users typically spend  $\times$  times more than their Genes Reunited counterparts; Findmypast Pay-as-you-go (PAYG) users typically pay around  $\times$  times the amount paid by Genes Reunited PAYG users. Note that, despite the differences in expenditure levels, the two sites score very closely on user satisfaction with *value for money* and the *price of accessing records*.

#### 1.4 Claimed sensitivity to price increases

- When asked what they would have done (when they took out their current Subscription/ Pay-as-you-go (PAYG) deal) if the prices had been 5/10% higher<sup>1</sup>, only a minority of Subscription and PAYG users claim they would not have gone ahead with their arrangement.
- Amongst those Subscription and PAYG users who would *not* have taken out their deal with their supplier had the prices been 5% or 10% higher, the majority would have switched to using another supplier. Only a minority would have instead opted for a different type of paid for service from their current supplier (i.e. PAYG users switching to buying a Subscription service, and vice versa).

#### 1.5 Intentions for renewing Subscription / Pay-you-go arrangements

- There does not appear to be a great deal of site switching amongst Genes Reunited /Findmypast users who pay for services. When asked what they will do when their subscription or number of credits run out, only between 7% and 11% of Genes Reunited / Findmypast Subscription/Pay-as-you-go users claim they intend to use a different supplier.

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<sup>1</sup> Users were presented with actual increased prices, based on the amount that they claim to have spent the last time they took out a Subscription / PAYG arrangement with Genes Reunited / Findmypast.

- The majority of those who intend to use a different supplier would use Ancestry (82% and 82% of Genes Reunited and Findmypast users respectively).

## 2. Background and research objectives

### 2.1 Background

Brightsolid and Friends Reunited, which respectively own the family history websites Findmypast and Genes Reunited, are understood to be two of the three largest suppliers of online genealogy services in the UK. These websites (to varying degrees) allow users to search and access historical information and documents, such as census results, birth, marriage and death records, and also supply family tree software capabilities.

It is the aim of Brightsolid to acquire Friends Reunited and take responsibility for the operation of the Genes Reunited website. Both of the proposed merging organisations currently compete with Ancestry, the market leader for such genealogy services.

### 2.2 Research objectives

As part of its investigation into the likely impact of the proposed acquisition of Friends Reunited by Brightsolid, Harris Interactive was commissioned by the Competition Commission, in November 2009, to undertake a market research survey amongst users of the Findmypast and Genes Reunited websites.

The research program sought to ascertain...

- how customers choose between different sites offering genealogy services
- which of the two websites best meets these needs
- whether customers use more than one site – and pay for more than one site
- the likely impact of any possible price increases
- the demographics of users

### 3. Research design

The research programme consisted of two stages:

- Stage 1** • **Quantitative online interviewing program** with 3,080 users
- Stage 2** • **Qualitative telephone depth interviews** with 20 users

#### *Quantitative online interviews:*

All quantitative interviews were undertaken during December 2009 with registered users of Genes Reunited and Findmypast. Sample information was provided by the two respective parties, with users being contacted via email and invited to participate in a 20 minute online survey, hosted by Harris Interactive.

Quotas were set to ensure a robust number of interviews were achieved with users from each of three user groups – Subscription, Pay-as-you-go and Free users. These user groups are defined in Figure 3.A.

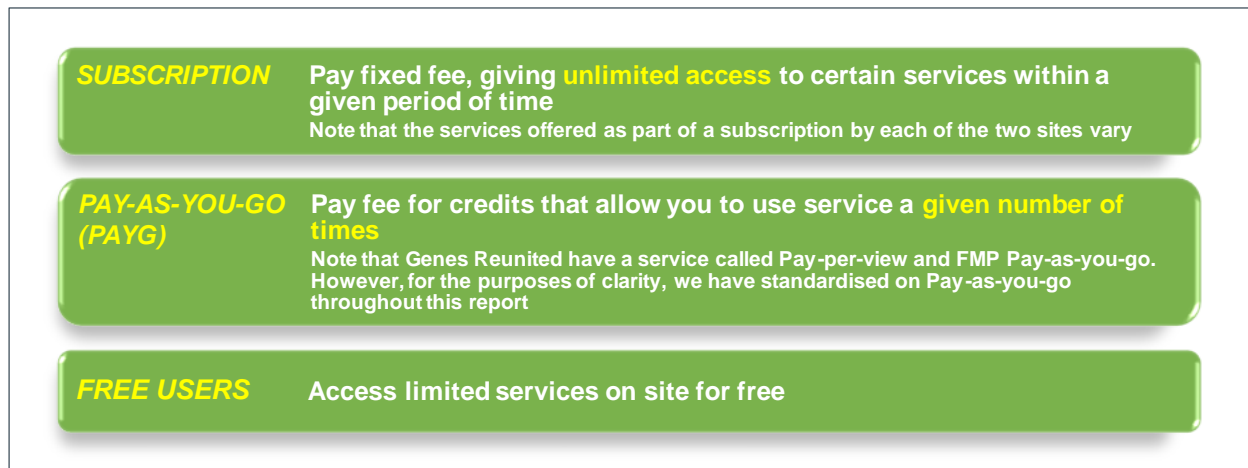


Figure 3.A: Definitions of family history website user types

*Note: A random sample of Findmypast and Genes Reunited users was conducted within each of the three user groups*

Figure 3.B, overleaf, details the number of interviews conducted for the study (see row ‘actual base – unweighted’) and also illustrates how the sample was balanced to ensure that:

- There were an equal proportion of Genes Reunited and Findmypast users in the sample
- Both the Genes Reunited and Findmypast samples were split equally between Subscription/PAYG/Free users

<i>Number of interviews</i>	Genes Reunited			Findmypast		
	Sub	PAYG	Free	Sub	PAYG	Free
Actual base (unweighted)	894	417	1009	901	574	626
<b>Adjusted balanced base (weighted)</b>	<b>736</b>	<b>736</b>	<b>736</b>	<b>736</b>	<b>736</b>	<b>736</b>

*Note: Some respondents fall into more than one of the user groups*

Figure 3.B: Number of interviews conducted for the online quantitative phase

**Qualitative telephone depth interviews:**

Twenty follow-up qualitative depth interviews were conducted with registered users from both sites during December 2009, with each interview lasting up to 45 minutes. These interviews were undertaken with participants of the online survey who expressed an interest in taking part in further research following the completion of their online interview.

The interviews were conducted with a selection of different user group types (Subscription; Pay-as-you-go; Free) across the two sites and were aimed at further enhancing the understanding of the process users go through in selecting and utilising one or more family history websites.

Selected findings and quotes from the qualitative interviews have been integrated with those from the quantitative study and are incorporated within the main body of this report.

**Note 1: All figures shown in subsequent charts are percentage figures (unless otherwise stated)**

**Note 2: The following abbreviations have been used in charts:**

- FMP = Findmypast
- GR = Genes Reunited

## 4. Typical user profile

### 4.1. User profile

The profile of the typical user of each of the two sites is presented in Table 1, with the UK national profile also provided for comparison.

The family history website market tends to be an older market in terms of its users. 82% of the users are retired and, as shown in Figure 4.A, users of the two family history websites are older than the national profile – 82% of all users are aged 55 or older (whereas 35% of the general population, aged over 16, are 55+). To provide an external comparison, ONS nationally representative data for 2008 suggests that around 20% of people who “used the Internet in the previous three months” were aged 55 or older. This serves to highlight more strongly the older age profile of the Genealogical website users.

In terms of gender, users are more likely to be women (56%) than men (44%).

The demographic profiles of Genes Reunited and Findmypast users are very similar (which is unsurprising, given that there is a great deal of crossover in usage between the two sites– see Section 5.1).

	Total Users	Findmypast	Genes Reunited	UK National Profile
Base: Total sample	(3080)	(2126)	(2416)	
	%	%	%	%
<b>Age</b>				
16-24				15
25-34				16
35-44				19
45-54				16
55-64				15
65+				20
<b>Gender</b>				
Men				49
Women				51

All figures relating to Total users, Findmypast and Genes Reunited have been removed

\* Source: ONS Population Estimate (Key Population and Vital Statistics 2007 Series VS No 34, PPI No 30)

Figure 4.A: Typical user profile

## 4.2 Family history experience

There is long experience of genealogical research and of using family history websites amongst site users...

**71% have at least 3 years experience of using such sites**

A substantial proportion can be termed to be intense users...

**44% of all users log on to such sites at least 2-3 times a week**

...and most (56% of all users) log on at least once a week.

Most also claim to have some level of expertise...

**61% claim to have *at least reasonable expertise* in family tree research**

Although similar in demographic profile, Findmypast users tend to be slightly more experienced in comparison to Genes Reunited users. As Figure 4.B shows, in comparison to their Genes Reunited counterparts, Findmypast users are more likely to:

- have been researching their family tree for at least three years
- have at least three years of using such sites
- be heavy users of the sites
- claim that they are at least reasonably experienced in family tree research

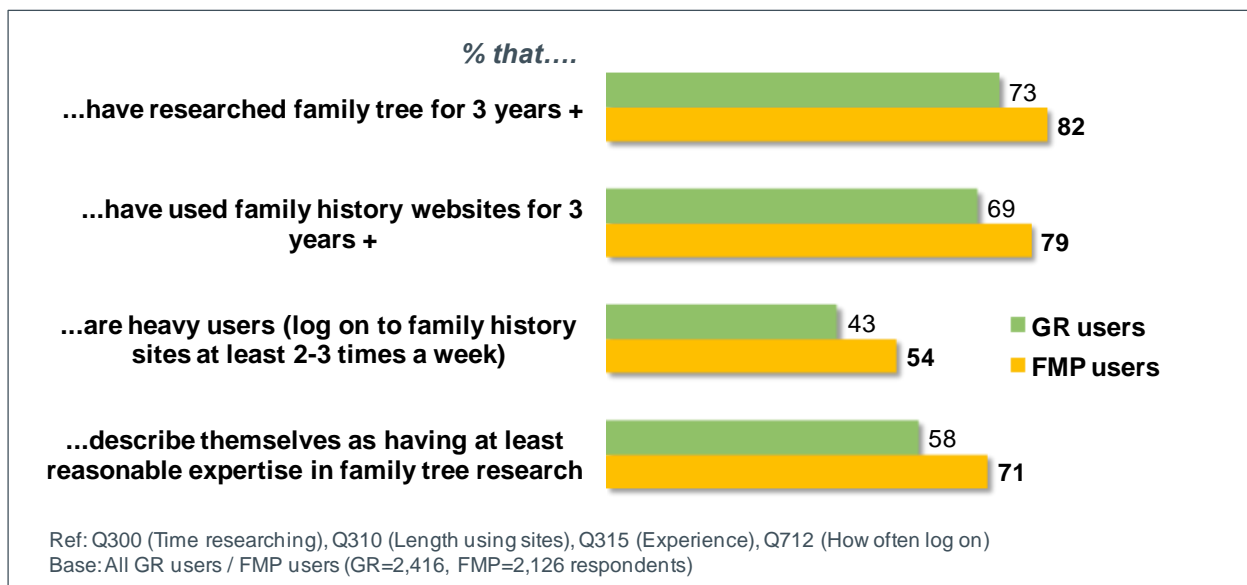


Figure 4.B: Experience levels of Genes Reunited users compared to Findmypast users

### 4.3 Online networking

Site users tend to be quite communal / social, in terms of a high proportion being in communication with others via the web...

**53% have offered advice / help to other users of family history sites**

**✕ % of all site users also use Facebook**

**✕% / ✕ % of GR / FMP users respectively use Friends Reunited**

Based on third party figures<sup>2</sup>, Harris estimates that around ✕% of Internet users have a Facebook account – very similar to the percentage that use Facebook amongst family history site users.

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<sup>2</sup> The UK Facebook User Statistics for July 2009 claim that there were 19 million Facebook users. Using ONS data, published in August 2009 (in a Statistical Bulletin on Internet Access), Harris estimates that approximately 40 million adults had Internet access in 2009.

## 5. Family history websites used

### 5.1 Usage of family history websites

Family history website users typically use multiple sites. Figure 5.A shows that the average user utilises four sites, with the average higher amongst Findmypast users than Genes Reunited users (4.2 v 3.7 sites).

Very few users make use of only one site - 4% of Findmypast users only use that site, and 15% of Genes Reunited users only use that site.

As further context:

- 96% of Findmypast users and 89% of Genes Reunited users at least “somewhat agree” with the statement “I use several websites for my research at any time”.

Therefore, as well as making use of several sites, users also claim to be making use of these sites at the same time – as illustrated by the quotes from the telephone depth interviews, shown in Figure 5.A. The implication is that the sites offer them different things (which is something that we turn to later in this report).

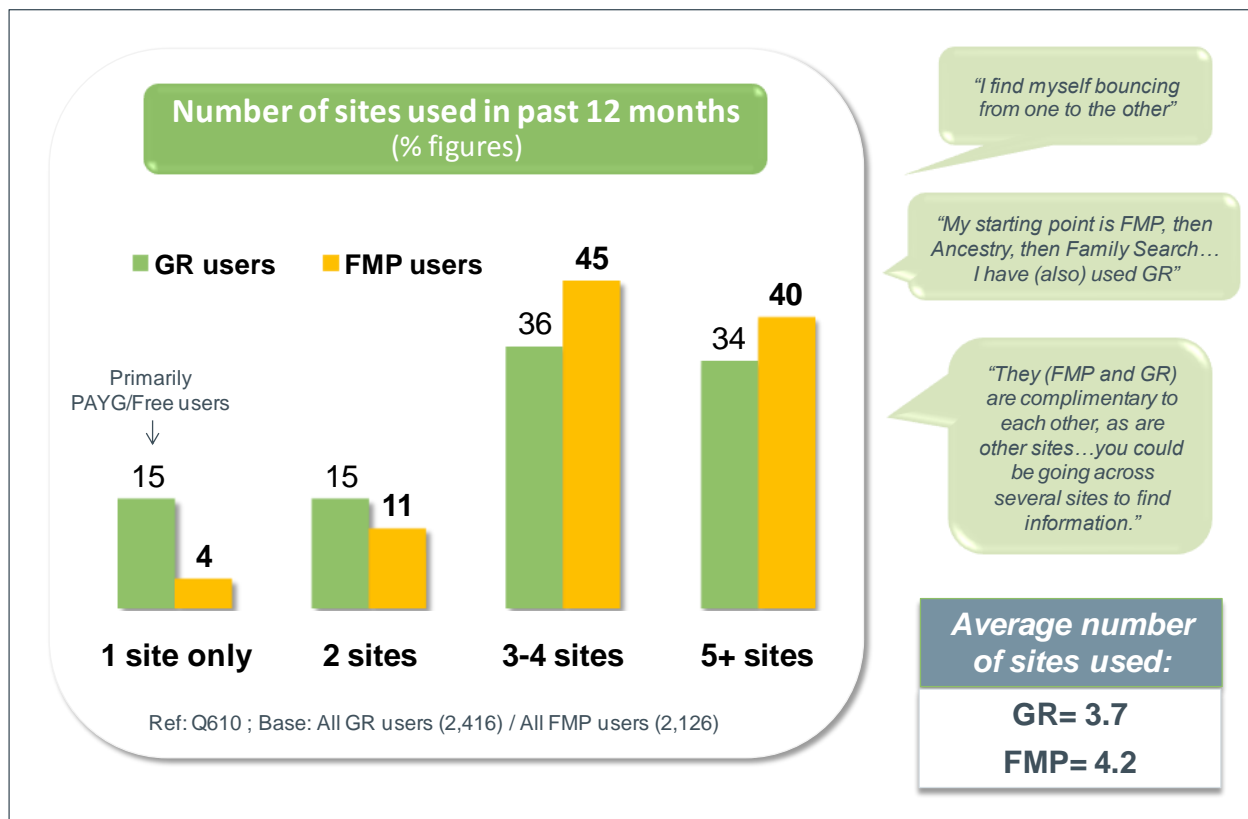
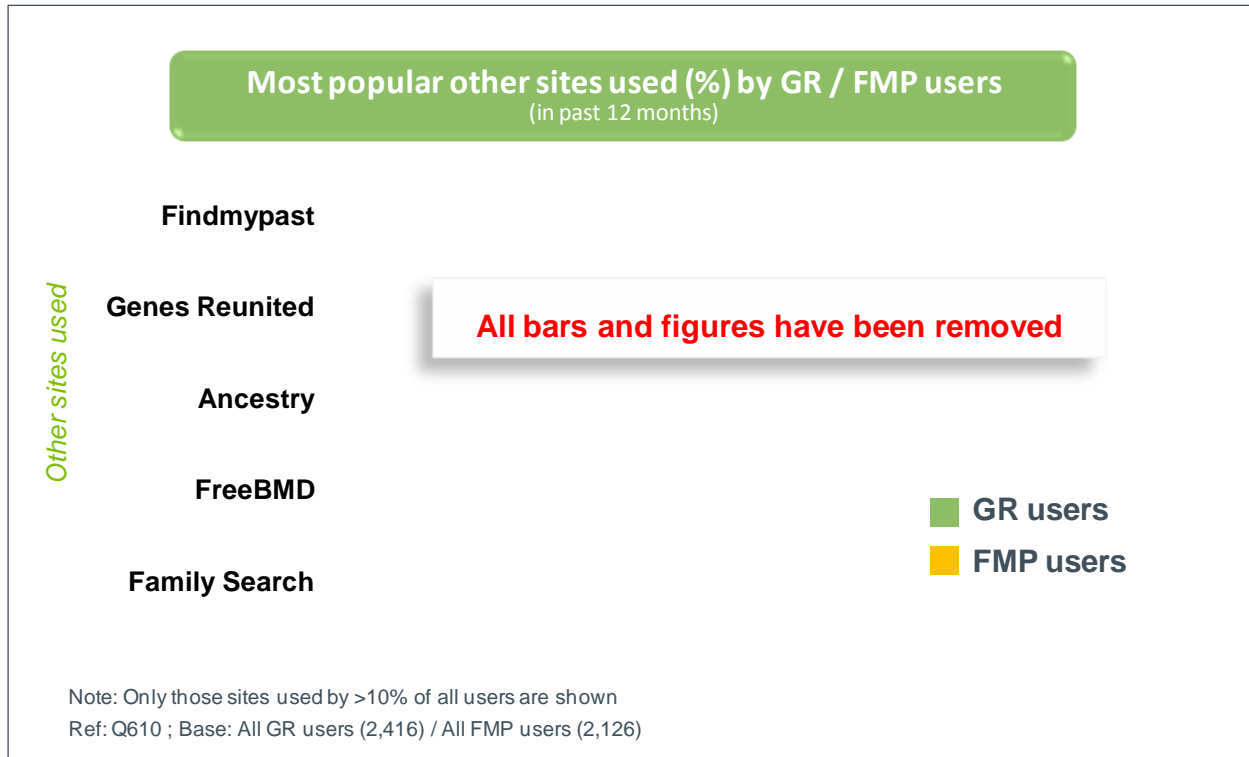


Figure 5.A: Number of sites utilised by users (irrespective of whether pay to use sites)

In terms of the sites used, there is a high level of overlap between Findmypast and Genes Reunited: most are dual users (i.e. use both sites). Figure 5.B shows that the majority of users of Findmypast and Genes Reunited make use of the other site.

The main additional site used by both Findmypast and Genes Reunited users is Ancestry, followed by FreeBMD and Family Search (Ancestry is the only one of these sites where users pay any fees). Each of these three alternate sites is used more commonly by Findmypast than Genes Reunited users, reflecting that Findmypast users typically tend to use more sites.



**Figure 5.B: Other sites utilised by Genes Reunited and Findmypast users (irrespective of whether pay to use)**

## 5.2 Payment to family history websites

This section focuses just upon those who pay to use either Genes Reunited or Findmypast.

Figure 5.C shows that, as well as using multiple sites, those who pay to use either Genes Reunited or Findmypast also typically pay to use at least one other site (two each on average).

Subscribers to Findmypast or Genes Reunited are equally likely to pay to use other sites (82% and 82% respectively). However, Findmypast Pay-as-you-go (PAYG) users are more likely than Genes Reunited PAYG users to pay to use others sites (82% v 72%).

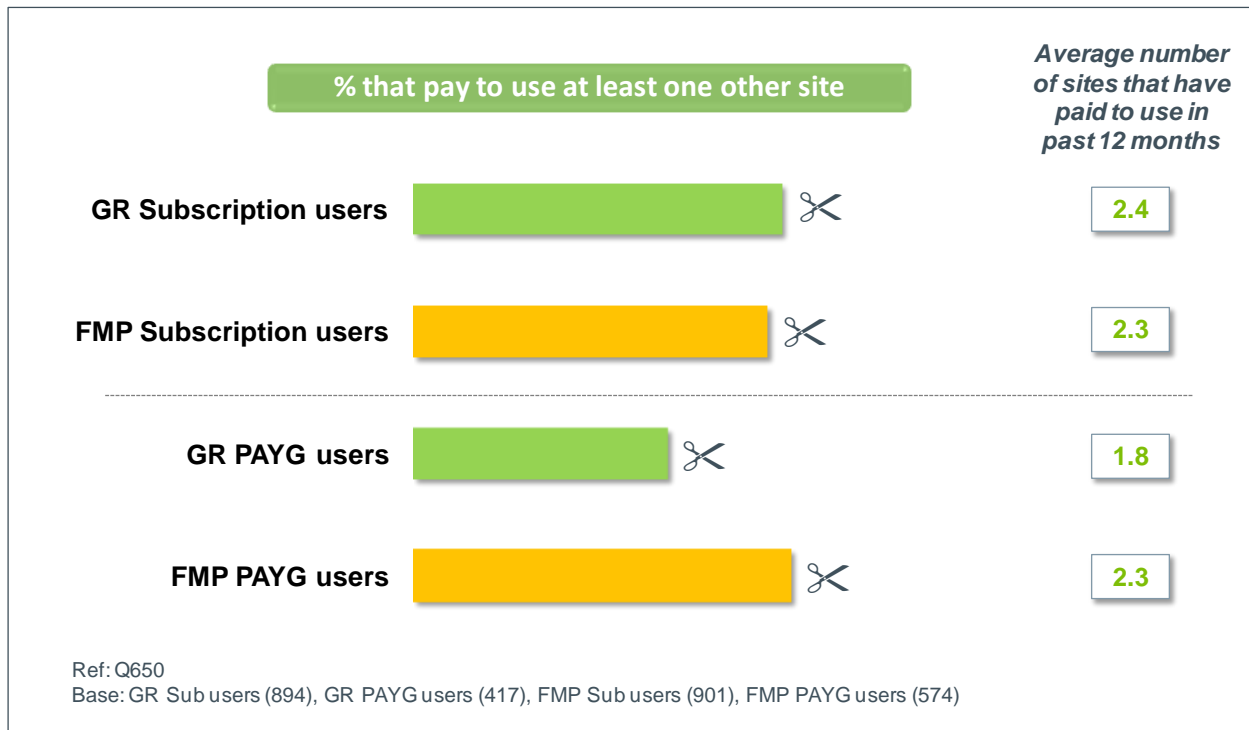


Figure 5.C: Do those that pay for services from Genes Reunited / Findmypast pay to use more than one site?

Figure 5.D shows there is a high level of overlap in the use of paid for services from the two providers, especially amongst those who have a subscription to either site.

- The majority of Genes Reunited Standard Subscription and Gold Subscription users also pay to use services from Findmypast. In comparison, a smaller percentage of Findmypast Subscription users pay to use services from Genes Reunited.
- A majority of Findmypast PAYG users also pay to access services from Genes Reunited. In comparison, a smaller percentage of Genes Reunited PAYG users pay to use Findmypast.

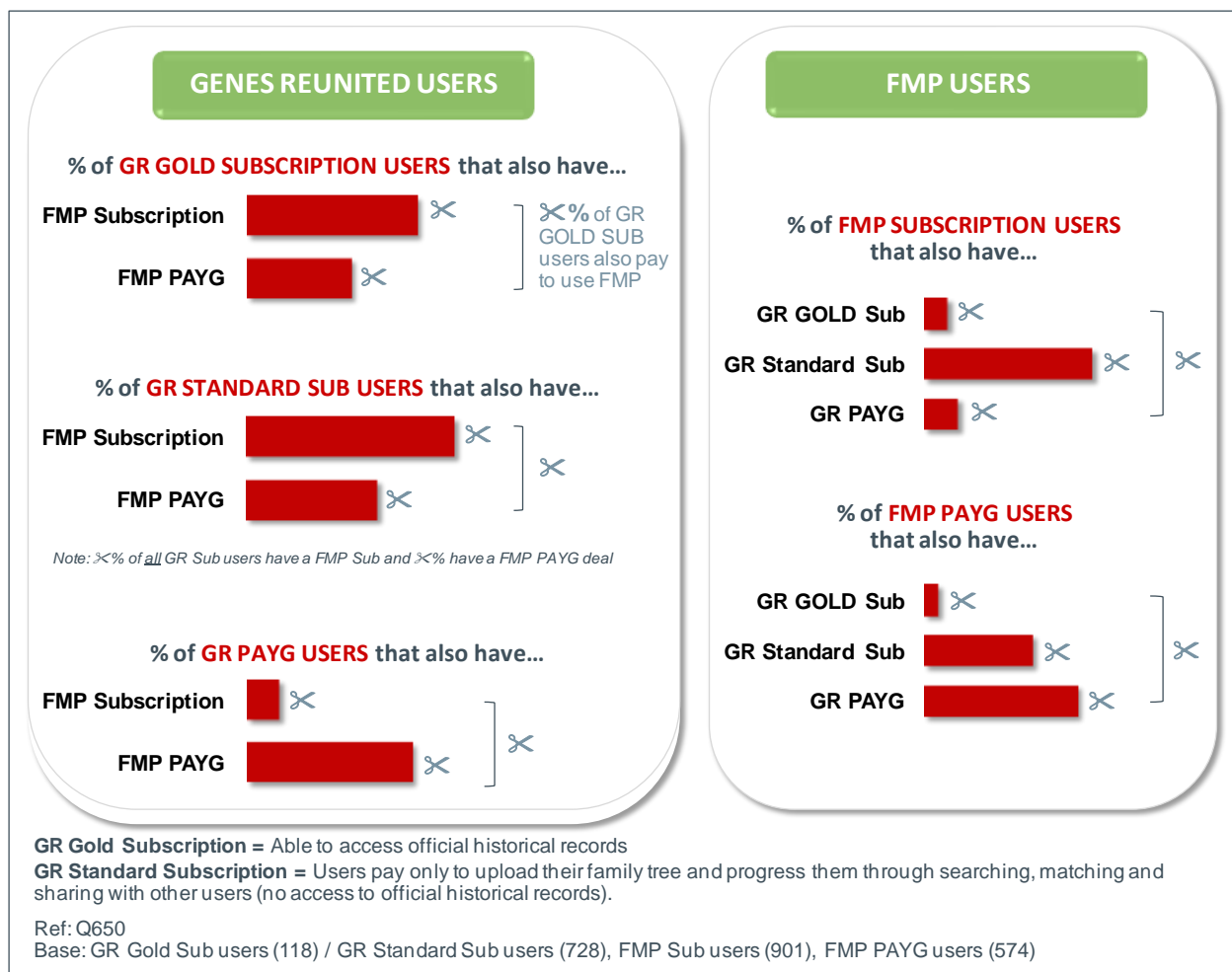
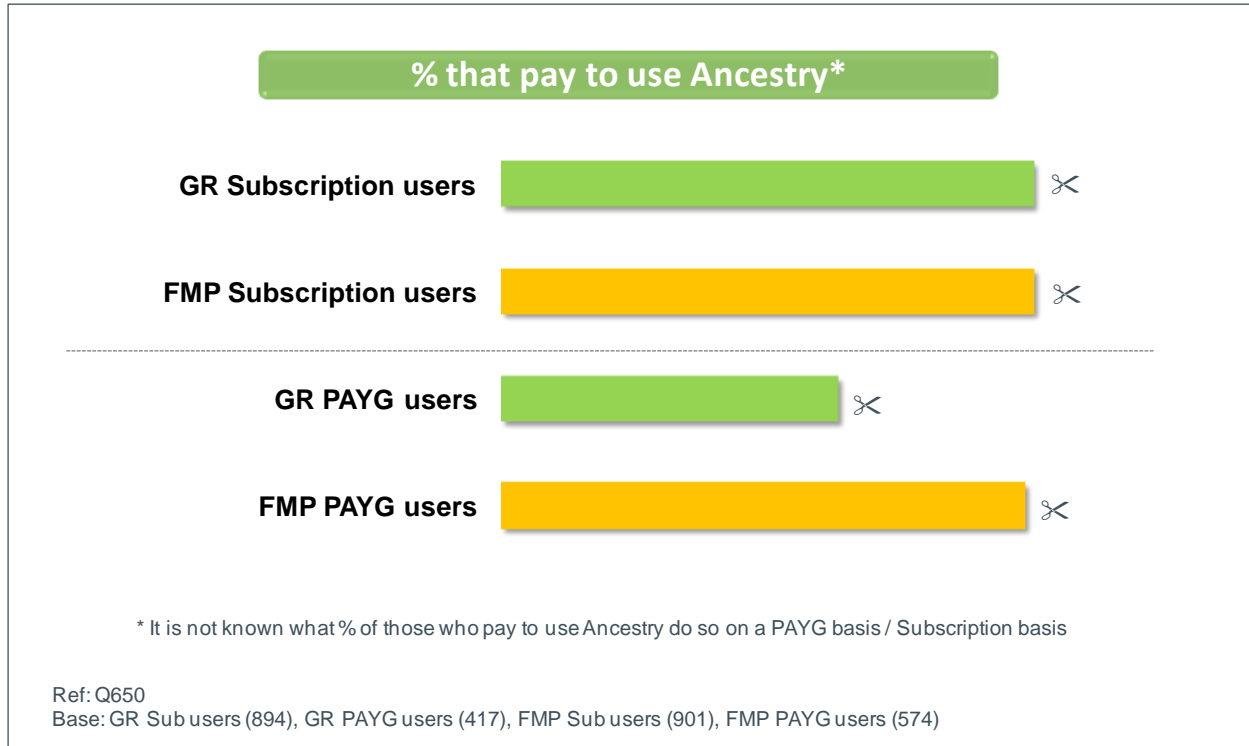


Figure 5.D: Overlap in usage between Genes Reunited / Findmypast users in pay for services

As noted in Section 5.1, Ancestry is the main other site that Genes Reunited/Findmypast users utilise. Figure 5.E shows that the majority of those that pay for services from Genes Reunited/Findmypast also pay to use Ancestry. This applies to 82% of subscribers to either site and 82% of Findmypast PAYG users. The only group where a minority pays to use Ancestry is Genes Reunited PAYG users (52%).



**Figure 5.E: Propensity to pay to use Ancestry amongst those who pay to use Genes Reunited or Findmypast**

### 5.3 Propensity of Free users to pay for use of other sites

Figure 5.F shows that many of those who are Free users of Genes Reunited or Findmypast pay to use other sites. This is more true of Findmypast Free users (32%) rather than Genes Reunited Free users (22%). Findmypast, Genes Reunited and Ancestry are the three main sites they are likely to pay for.

Findmypast Free users are equally likely to pay for Genes Reunited services as they are to pay to use Ancestry (22% v 22%).

Genes Reunited Free users are marginally more likely to pay to use Ancestry (22%) than they are to pay for Findmypast services (20%).



**Figure 5.F: Propensity for Free users of Genes Reunited / Findmypast to pay to use other sites**

## 6. Reasons for using and not using sites

### 6.1 How did site users first become aware of the site?

8% of Genes Reunited users became aware of Genes Reunited through Friends Reunited.

Findmypast users typically became aware of Findmypast via an Internet search engine (8%), although a variety of other methods were also stated (see Figure 6.A).

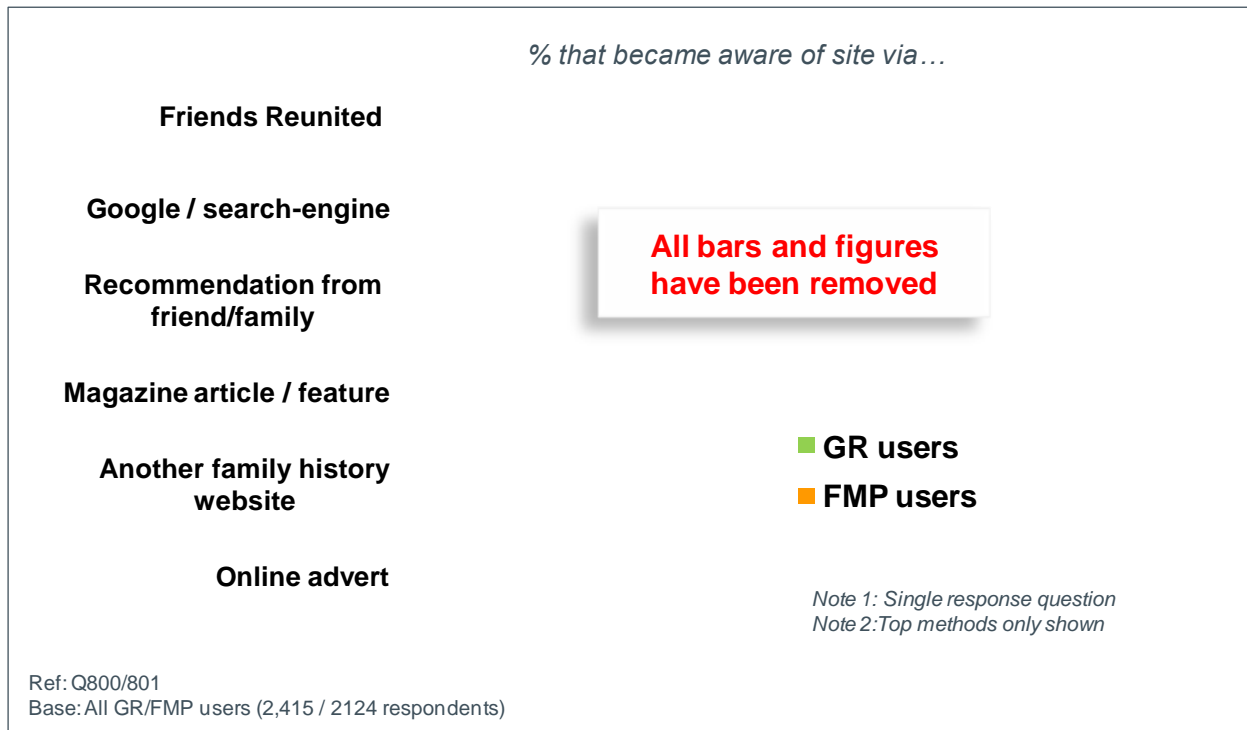


Figure 6.A: Method by which users first became aware of site

## 6.2 Differences in the services that Genes Reunited and Findmypast Subscription users typically access

Many of the subsequent findings in this section (6) reflect that there is a fundamental difference in the services that Genes Reunited and Findmypast Subscription users typically have access to and make use of.

For Genes Reunited Subscription users, interaction with other users of the site is key. Genes Reunited offers two types of subscription service – a *Gold* membership and a *Standard* membership.

- More than 70% of Genes Reunited Subscription customers were found to have a *Standard* membership, through which users pay only to upload their family tree and progress them through searching, matching and sharing with other users.
- Only those with a *Gold* membership (less than 30% of Subscription users) have access to official historical records.

In contrast, all Findmypast Subscription users have access to official historical records.

The quotes below from the telephone depth interviewing phase, illustrate the differences between the two sites:

- *“If another site user is looking for someone, I can make direct contact with them, share information and share a dialogue – no other site has a facility like that” Genes Reunited User*
- *“It’s (Genes Reunited) mainly about interacting with other people” Genes Reunited User*
- *“Genes Reunited is more of a data-sharing site. You put on a family tree and share it. It’s a social networking site – Findmypast does not do that” Genes Reunited + Findmypast User*
- *“Findmypast and Genes Reunited are the best – they fulfil different functions – Findmypast provides data and Genes Reunited networking” Genes Reunited + Findmypast User*
- *“They are very different...they come from very different angles. Genes Reunited is tree-based – a site from which you can find other contacts. Findmypast tends to be record-based” Genes Reunited + Findmypast User*

### 6.3 Main reasons for using each site

Figure 6.B shows the main reasons (based on a multiple response question) for using each of Genes Reunited and Findmypast, plus Ancestry (another key player in the family history website market).

The main differences in the reasons quoted for using Genes Reunited and Findmypast are driven by the functionality of the two sites. Amongst Findmypast users, the clear top reason is to *search for a particular person(s)*, followed by to *search a particular set of records*.

Amongst Genes Reunited users, alongside *searching for a particular person(s)*, reasons relating to the site’s user interaction capabilities - *searching others’ family trees* and *interacting with other users* - are key, reflecting the social interaction capabilities of the Genes Reunited site.

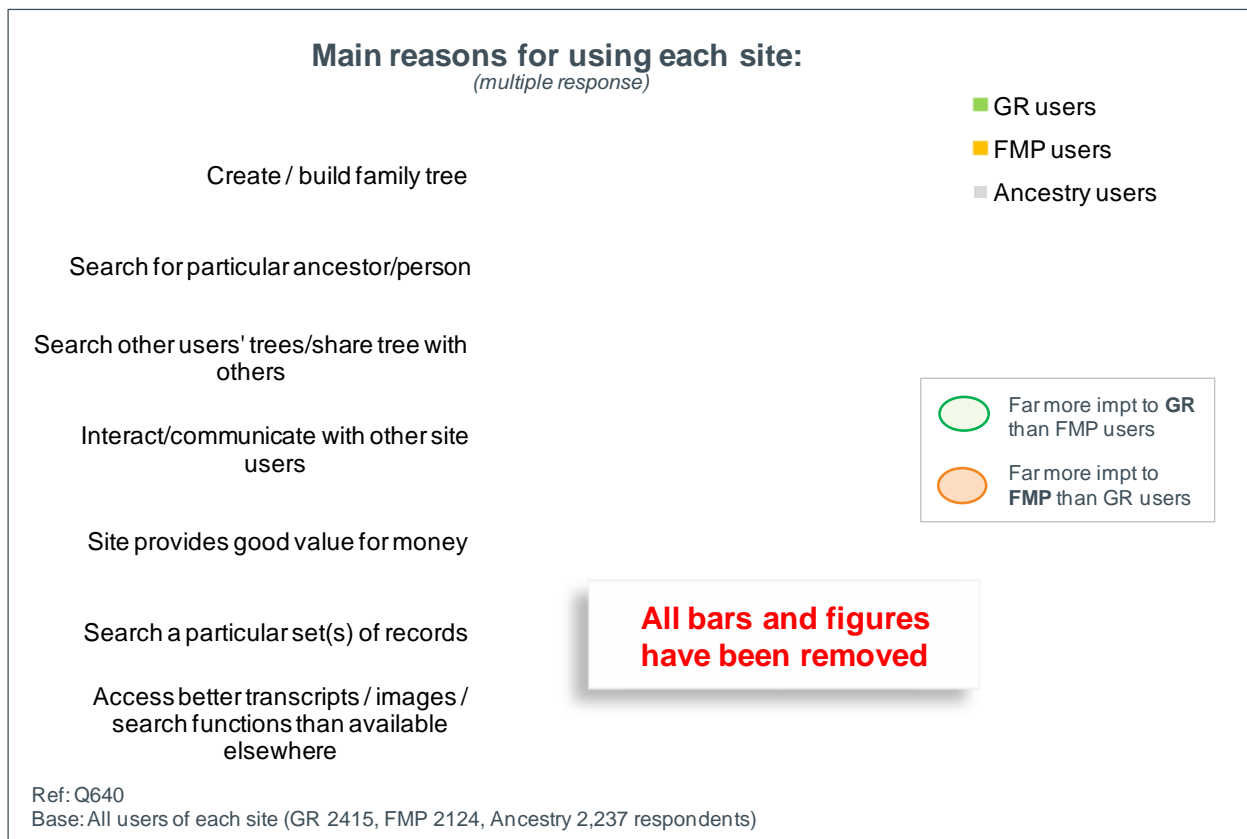


Figure 6.B: Main reasons for using each site

Note also that Genes Reunited users are much more likely than their Findmypast counterparts to choose the site to *create/build their family tree*. ✂.

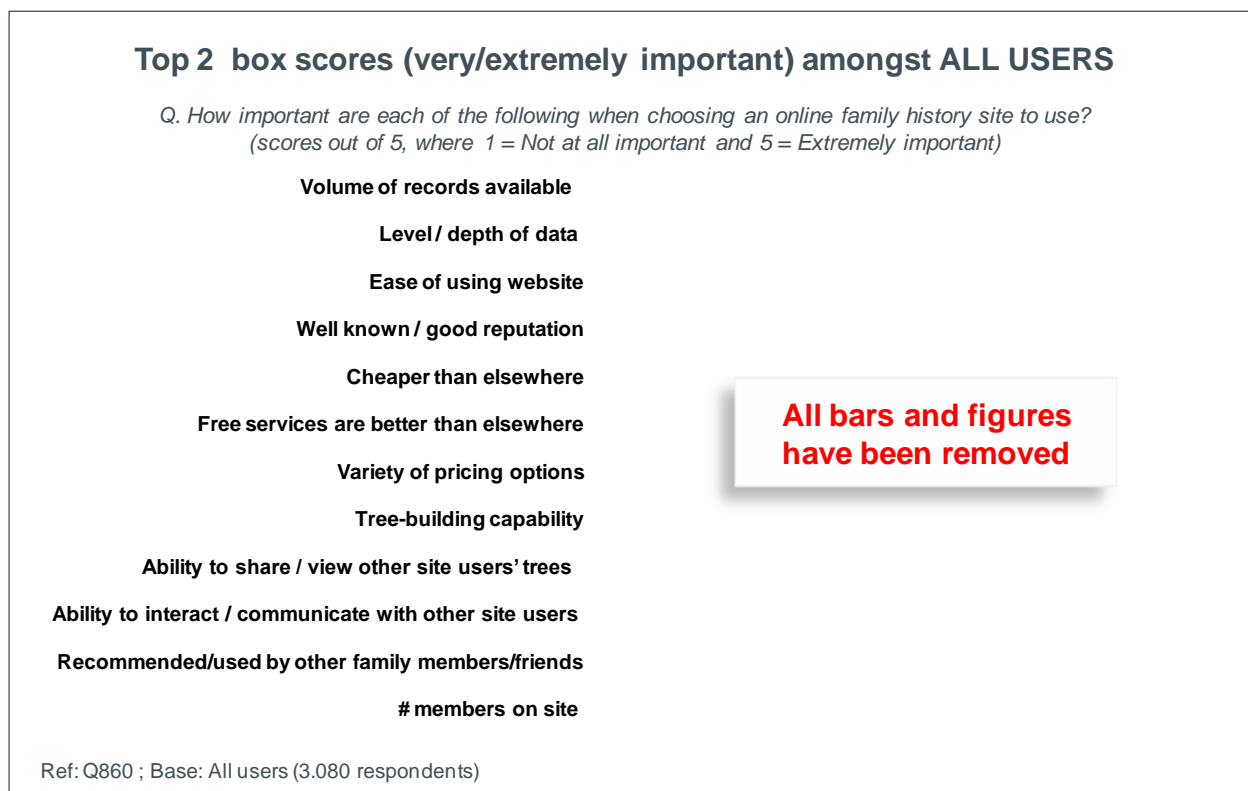
When looking at the reasons for why people use Ancestry (again, see Figure 6.B), the site is similar to Findmypast in ✂. However, Ancestry users are more motivated by ✂. This reflects that Ancestry, unlike Findmypast, offers a social networking function (search for particular person / particular set of records).

## 6.4 How the sites perform in meeting user needs

### 6.4.1 Drivers for choosing an online family history site

In addition to asking users why they specifically chose to use Genes Reunited / Findmypast, users were also asked to rate the importance of the areas/aspects shown in Figure 6.C when choosing online family history sites, per se.

The key factors that emerged amongst both sets of users relate to the *volume* and *depth* of data, plus *ease of use*. Several factors are more important to Genes Reunited than Findmypast users, as highlighted in Green in Figure 6.C.



**Figure 6.C: Factors that are most important when it comes to choosing an online family history website to use**

### 6.4.2 Areas in which the sites outperform one another on satisfaction

Figure 6.D shows the drivers in choosing a family history (shown from most important, at the top, to least important, at the bottom) and plots the differences between the top two satisfaction scores which were given by Findmypast and Genes Reunited users relating to the respective two sites.

Satisfaction-wise, each site has its own distinct strengths, which reflect the different nature of the services typically accessed by users of each site.

- Findmypast has a large lead over Genes Reunited on satisfaction with ✂, reflecting that the site appears to be primarily centred around the ability to access official records.
- Genes Reunited most notably outscores Findmypast on areas relating to the *social aspects* of the site ✂.

Note that the two sites score very closely on satisfaction with ✂.

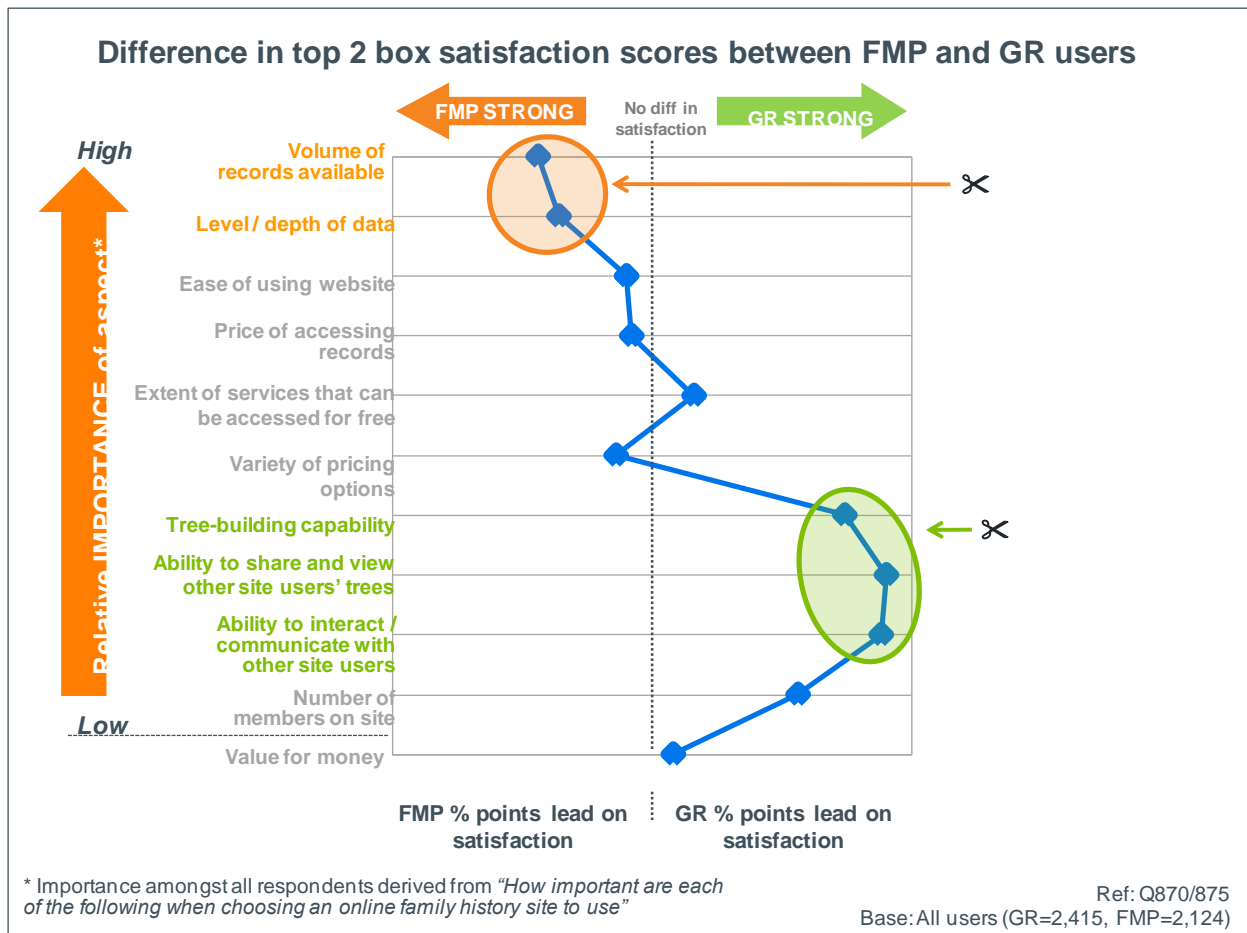


Figure 6.D: Areas in which the sites outperform one another on satisfaction

## 6.5 Genes Reunited's Hot Matches service

Asides from the differences in the services available to Subscription users of the two sites (as highlighted in Section 6.2), another difference in the services offered to customers (which came to light in the telephone depth interviews) is that Genes Reunited offers what is called a "Hot Matches" service. A number of Genes Reunited customers interviewed in the telephone depth interviews spoke of this service, which, on a fortnightly basis, provides an automatic matching service between the user's family tree and other user trees on the site.

Illustrative comments from Genes Reunited users (from the telephone depth interviews) include...

- *"I think I would be lost without it (Genes Reunited's Hot Matches). ...I'm not aware of any other sites that do all the matching up. Hot Matches is really useful – I have made several contacts that way"*
- *"I mainly use it (Genes Reunited) to contact people who have either contacted me or have been thrown up as a Hot Match...It is the only one I use for Hot Matches"*
- *"I go on to check message boards and help wanted. I get e-mails on Hot Matches and check those".*

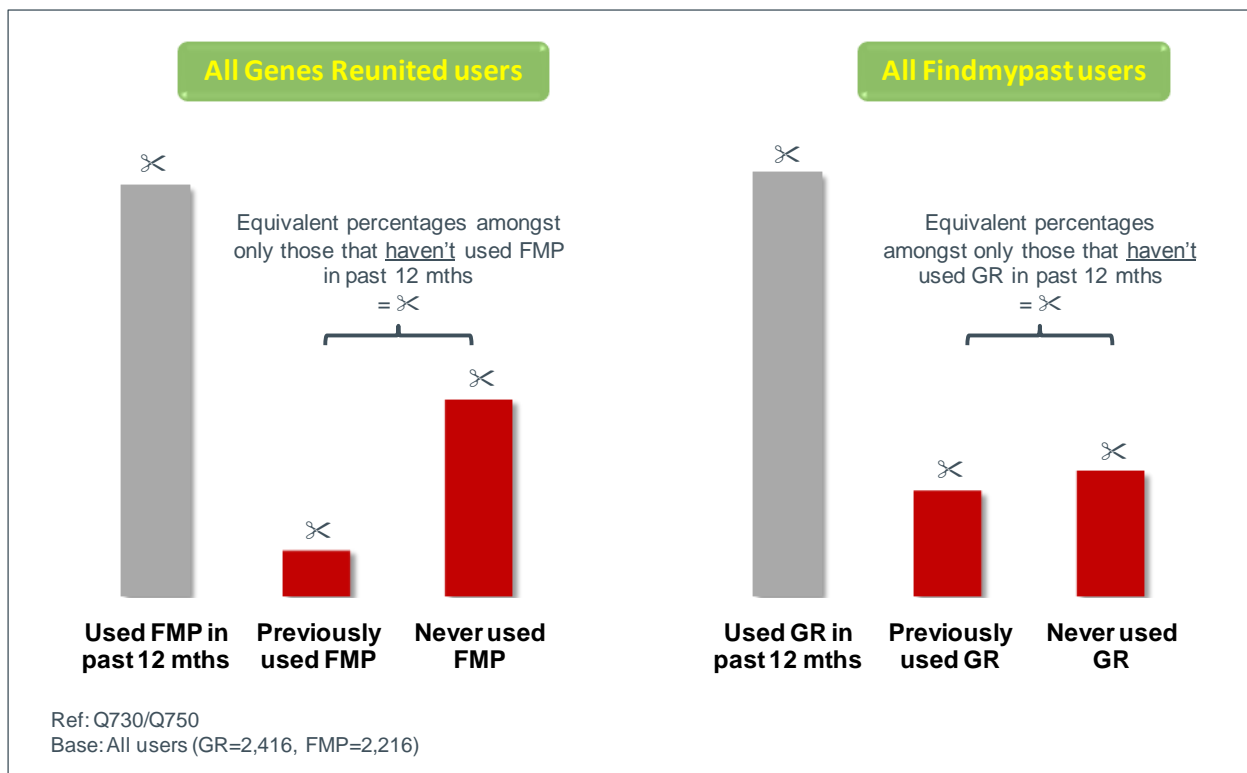
## 6.6 Reasons that some users have stopped using Genes Reunited / Findmypast

### 6.6.1 Proportion of current non-users of Genes Reunited / Findmypast that have ever used the other site

Figure 6.E shows a breakdown of Findmypast and Genes Reunited users, showing the proportion of each who have used the other respective site in the last twelve months and, if not, whether they have used the site prior to the last twelve months.

Of those Genes Reunited users who haven't made use of Findmypast in the past twelve months (82% of all Genes Reunited users), most have never done so.

82%, amongst the 82% of all Findmypast users who haven't made use of Genes Reunited in the past twelve months, almost 82% have previously used Genes Reunited (i.e. more than twelve months ago).



**Figure 6.E: Proportion of current non-users of Genes Reunited / Findmypast that have ever used the other site**

### 6.6.2 Reasons why those who previously used Genes Reunited / Findmypast no longer do so

Amongst those who previously used Genes Reunited but have not done so in the past twelve months, the key reason for not having done so is ✂.

The key reason for not having used Findmypast in the past twelve months<sup>3</sup> is ✂.

✂

**Figure 6.F: Reasons for not having used Genes Reunited / Findmypast in the past twelve months (amongst those that last used Genes Reunited / Findmypast more than twelve months ago)**

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<sup>3</sup> Amongst those who have previously used Findmypast, but not within the past twelve months

## 7. Expenditure and price sensitivity

### 7.1 Expenditure on family history sites

There is a 3x difference in the subscription fees paid by Findmypast and Genes Reunited customers. The top table in Figure 7.A shows that Findmypast Subscription users paid, on average, 3x times the amount that Genes Reunited Subscription users paid when they last took out a subscription. In making this comment we are not attempting to make a value for money judgement – as Section 6.2 shows, the services that Findmypast and Genes Reunited Subscription users typically access are very different; also, Section 6.4.2 shows that the two sites score very closely on user satisfaction with 3x.

Figure 7.A also shows that Findmypast Pay-as-you-go (PAYG) users typically pay 3x times the amount paid by Genes Reunited PAYG customers - 3x.

3x

**Figure 7.A: Spend on leading pay-for-services sites**

The yearly amount that Findmypast Subscription users pay appears comparable to the amount that is spent by those who pay to use Ancestry<sup>4</sup> (£3x). The indications are that yearly spend with Genes Reunited (£3x) is lower than not only Findmypast and Ancestry, but also The Genealogist (£3x) and Origins (£3x).

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<sup>4</sup> For Ancestry, The Genealogist and Origins, it is not known what proportion of customers who pay for services from the site are Subscription as opposed to PAYG customers

## 7.2 Main reason for not paying to access Findmypast or Genes Reunited

Figure 7.B shows that the two main reasons why Free users of Findmypast and Genes Reunited choose not to pay for services from these sites are that ✂.

Genes Reunited Free users are less likely than their Findmypast counterparts to feel that ✂.

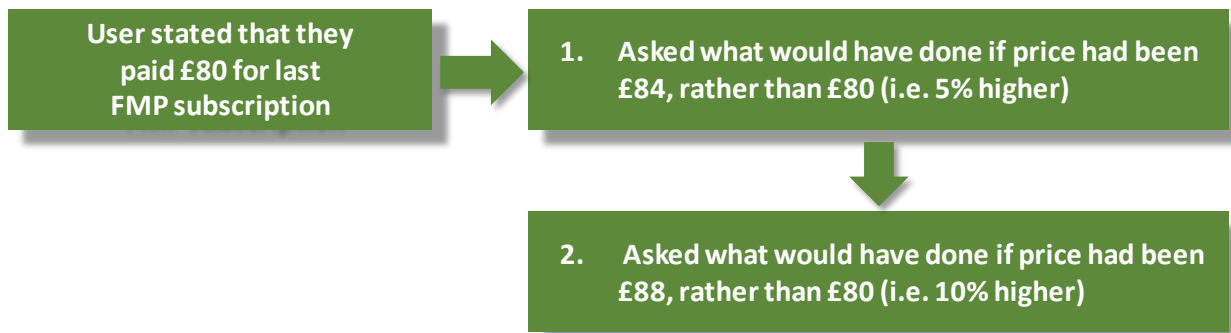
✂

**Figure 7.B: Main reason for not having paid to use any services on site (amongst those that use Genes Reunited / Findmypast for free)**

### 7.3 Claimed sensitivity to price increases

*This section examines the potential impact on users of price increases. Please note that the findings are based on predictive/ claimed behaviour.*

*Users were presented with actual increased prices, based on the amount that they claim to have spent the last time they took out a Subscription / PAYG arrangement with Genes Reunited / Findmypast. For example...*



*The primary purpose of these questions was to understand to what degree price increases would be likely to...*

- a) Stop users from researching altogether*
- b) Cause them to switch to using another supplier*

**What impact would a price increase of 5% or 10% have had on Subscription users?**

Figure 7.C shows that even had prices been higher by 10%, the majority of Genes Reunited and Findmypast Subscription users claim that they would still have taken out a subscription.

Amongst those Subscription users who claim their behaviour would have been affected at a 10% increase level...

- A 30% proportion claim they would have *stopped* their research
  - At a 10% price increase level, 30% of either Genes Reunited or Findmypast Subscription users claim they would have stopped their research
- 30% proportion would have *switched to a PAYG deal*
  - 30% of all Genes Reunited Subscription users and 30% of Findmypast Subscription users claim they would have instead opted for a PAYG deal.
- 30% would have typically simply *switched to another supplier*
  - 30% of all Genes Reunited Subscription users and 30% of Findmypast Subscription users claim they would have turned to another website for their research.

30%

**Figure 7.C: Impact of a price increase of 5% or 10% on SUBSCRIPTION users**

**What impact would a price increase of 5% or 10% have had on Pay-as-you-go users?**

Figure 7.D shows that, at both a 5% and 10% price increase level, the large proportion of Pay-as-you-go (PAYG) users claim they would still have taken out a PAYG arrangement with their supplier - though some of these users, particularly at a 10% increase level, claim that whilst they would still have taken out their PAYG deal, it would have caused them to reduce the number of times they buy such credits.

At a 10% price increase level...

- 32% of Genes Reunited and 32% of Findmypast PAYG customers claim they would have *stopped their research*.
- 32% of each of Genes Reunited and Findmypast PAYG users claim they would have *switched* to a Subscription deal.



**Figure 7.D: Impact of a price increase of 5% or 10% on Pay-as-you-go (PAYG) users**

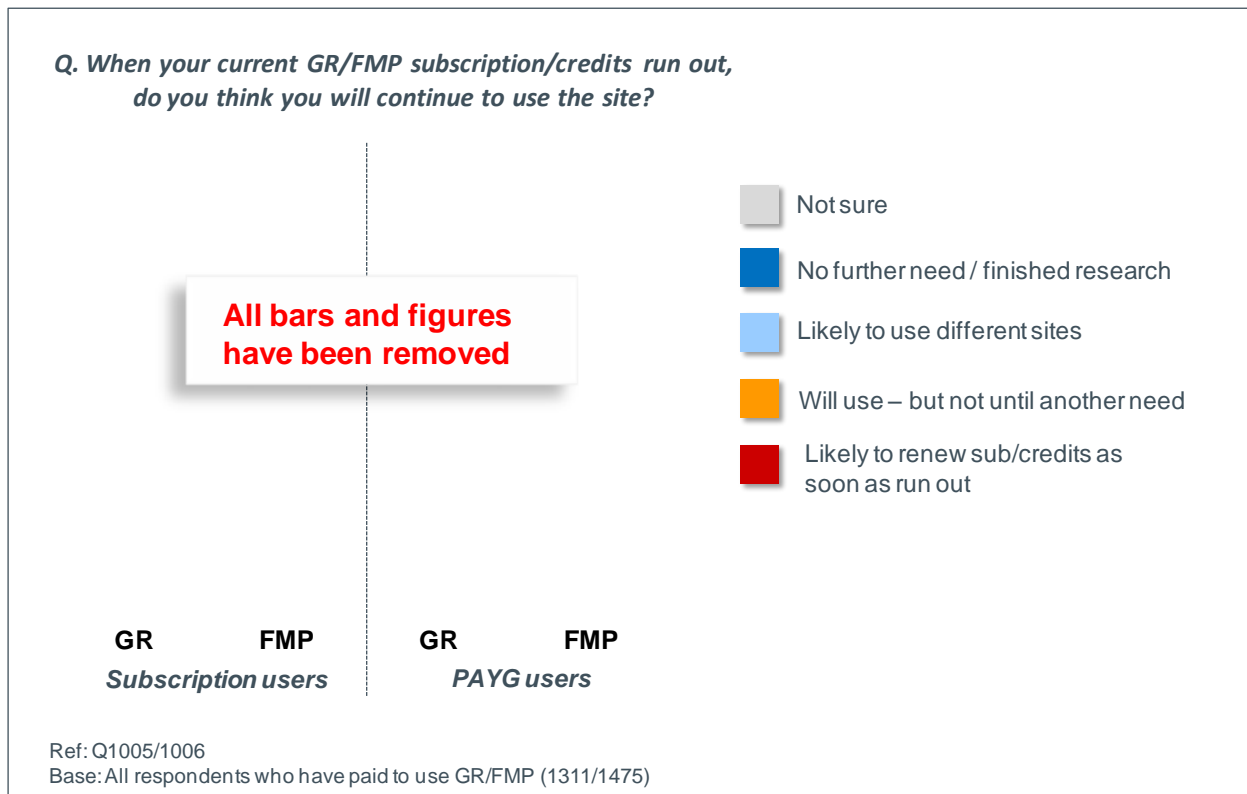
## 7.4 Predicted behavioural loyalty at time of renewal

### 7.4.1 Do Genes Reunited / Findmypast Subscription and Pay-as-you-go users intend to continue using the site when their current arrangement comes to an end?

Figure 7.E shows that when they are asked what they will do when their subscription or number of credits run out, around 80% Subscription and Pay-as-you-go (PAYG) users say that they will carry on paying to their current provider (either renewing their deal immediately or when they next have a need).

80% of both Genes Reunited and Findmypast Subscription users claim that they will renew as soon as their subscription runs out (80% and 80% respectively). The time lag for PAYG customers to renew is of course longer than that for Subscription users, due to the very nature of PAYG.

20% to 20% of any of the pay-for-groups claim that they intend to switch to using a different site(s).



**Figure 7.E: Do Genes Reunited / Findmypast Subscription and PAYG users intend to continue using the site?**

#### 7.4.2 Reasons why some Genes Reunited / Findmypast pay customers intend to switch to another site (when current subscription/credits run out)

Figure 7.F shows that amongst the 3% of users who say they are going to switch to using another supplier once their subscription or credits run out, the motivation is not simply cost-related. 3%.

3%. This difference reflects that Genes Reunited paying customers typically pay a lower amount for the services that they access than Findmypast users (see Section 7.1).

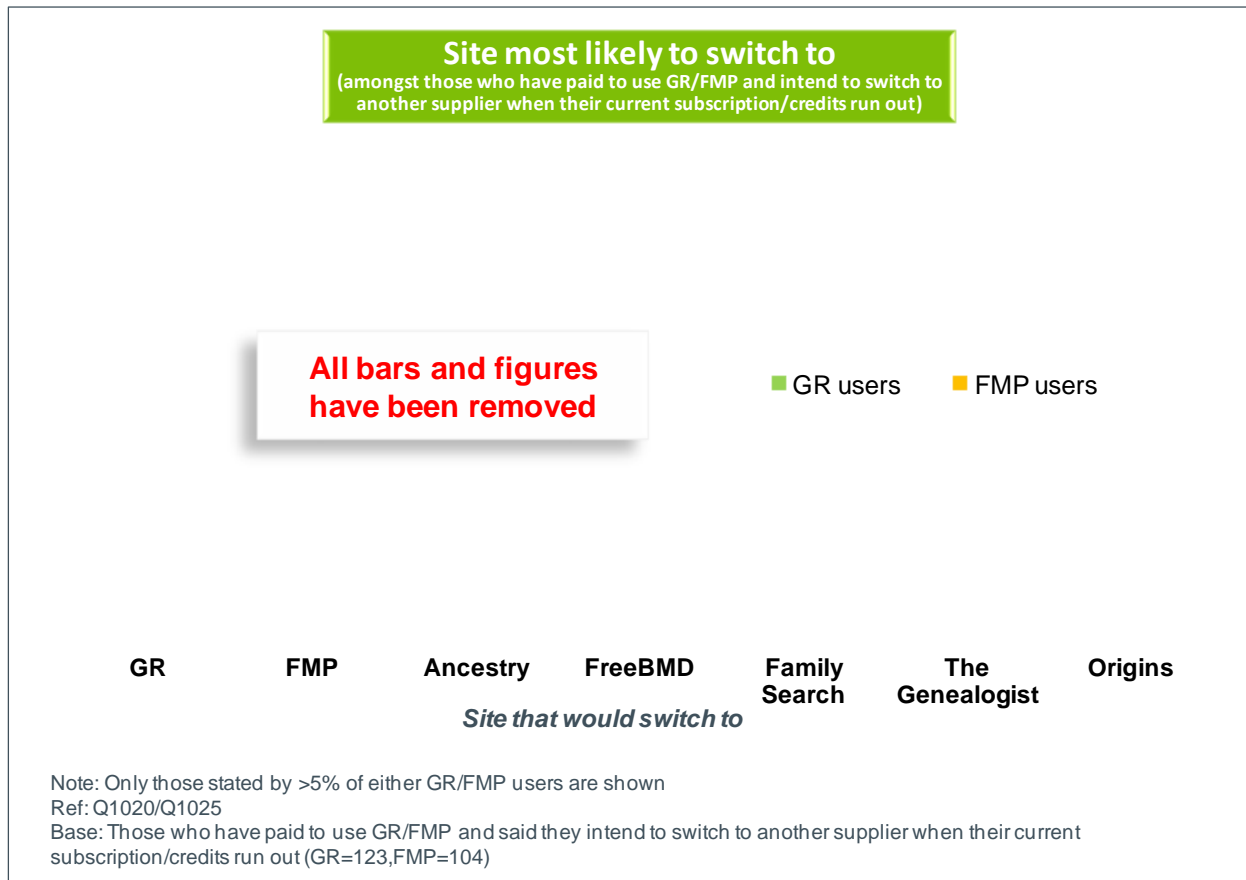
3%

**Figure 7.F: Reasons why some Genes Reunited / Findmypast pay customers intend to switch to using another site (when current subscription/credits run out)**

### 7.4.3 Site most likely to switch to (amongst those who pay to use Genes Reunited/Findmypast and intend to switch supplier)

Figure 7.G shows that the majority of those who intend to switch to using another site(s) when their subscription/PAYG deal comes to an end intend to use Ancestry.

Genes Reunited switchers appear much more likely to look to use Findmypast (32%) than Findmypast switchers are likely to look to use Genes Reunited (22%). Findmypast switchers would be more likely to switch to using FreeBMD (22%) and Family Search (22%) than Genes Reunited.



**Figure 7.G: Site most likely to switch to (amongst those who pay to use Genes Reunited/Findmypast and intend to switch supplier)**