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Exploring Digital Legacy Planning Among Older Adults: A Proposed Study Through Diffusion of Innovations

Sergio Carvajal-Leoni^{1,*}

¹ Department of Adult, Professional and Community Education, Texas State University, San Marcos, TX, USA

*Corresponding author. Email: sec71@txstate.edu

Received: 29 January 2026, Accepted: 24 February 2026, Published: 26 February 2026

Abstract

Digital legacy planning refers to the intentional organization and management of digital assets and digital identity in anticipation of incapacity or death. Despite the growing volume and personal significance of digital materials, engagement in digital legacy planning remains limited, particularly among older adults. This article presents a conceptual and methodological foundation for a proposed quantitative study examining factors that shape older adults' behavioral intention to engage in digital legacy planning, conceptualized as a preventive innovation and a socially embedded process situated within postdigital adult life. Guided by Diffusion of Innovations theory, Moore and Benbasat's Perceived Characteristics of Innovation framework, and insights from adult development and intergenerational learning, the paper outlines a cross-sectional survey design. The proposed study introduces a partially standardized collaborative prototype of digital legacy planning through a brief informational video to anchor participants' understanding of the innovation and involves an online questionnaire administered to adults aged 60 and older residing in an age-restricted community in central Texas. The instrument adapts validated measures of perceived relative advantage, compatibility, complexity, trialability, and observability, and extends the framework by incorporating two social influence constructs: explicit encouragement and perceived social value. Behavioral intention to engage in digital legacy planning is specified as the dependent variable, with planned analyses including descriptive statistics, reliability assessment, and multiple linear regression. The proposed design is intended to clarify whether digital legacy planning functions as a preventive innovation among older adults and to identify key perceptual and relational factors shaping intention. By articulating a theoretically grounded and educationally informed study design, the paper aims to inform future empirical research and the development of adult education and communication interventions that support socially meaningful digital legacy planning.

Keywords: Digital Legacy Planning; Preventive Innovation; Older Adults; Social Influence; Behavioral Intention

1. INTRODUCTION

As digital technologies increasingly mediate communication, memory, identity, and social relationships, individuals leave behind extensive digital traces that persist beyond their lifetime. These traces include social media profiles, email accounts, photographs, videos, cloud-stored documents, and other forms of personal data that collectively constitute what scholars have described as a digital legacy [10]. Digital legacy planning refers to the intentional process by which individuals organize, manage, and make decisions about their digital assets and digital identity in anticipation of incapacity or death [4]. Despite the growing volume and personal significance of digital materials, engagement in digital legacy planning remains limited and uneven, with studies reporting low awareness, uncertainty, and postponement of planning activities, as well as variation associated with differences in digital access, social and cultural context, and overall preparedness. [24,37].

In existing scholarship, research on digital legacy planning has largely concentrated on technical management, platform design, and specific planning behaviors within the field of human-computer interaction, with comparatively fewer studies examining how the practice is framed as a socially

embedded and educational process [10]. At the same time, emerging work has begun to argue that digital afterlife technologies raise ethical, existential, and educational questions that extend beyond traditional HCI concerns and require broader conceptual frameworks [33]. Parallel research on digital afterlife preparedness further demonstrates that engagement with post-death digital traces is unevenly distributed and shaped by differences in digital access and literacy, underscoring the importance of situating these practices within wider social contexts [24].

From a postdigital perspective, this shift reflects growing recognition that learning, identity formation, and social interaction occur under conditions in which digital and nondigital experiences are deeply intertwined and mutually shaping [13,25,34]. Within this context, digital legacy planning can be understood not simply as a set of technical tasks, but as a relational practice through which adult developmental processes and family relationships are negotiated in everyday life.

Older adults represent a population for whom this relational and developmental framing may be especially salient. Following the World Health Organization, older adulthood is commonly defined as beginning at age 60, a life stage associated with increased vulnerability to chronic and terminal health conditions and closer proximity to end of life [38]. From a developmental and educational perspective, later adulthood is also associated with reflection, reassessment, and meaning-making. Adult development scholarship emphasizes that this life stage involves ongoing tasks related to identity, purpose, and relationships [21]. These characteristics make digital legacy planning particularly relevant in later life, as the process involves reflection on values, life experiences, and responsibilities toward significant others through the intentional organization of digital materials for those who will inherit or manage them [10].

Recent empirical work has begun to examine older adults' attitudes toward digitally mediated post-death practices from an explicitly developmental perspective. For example, Kawashima et al. [17] report associations between engagement with digital afterlife issues and psychosocial orientations relevant to later adulthood, suggesting that how older adults relate to their digital legacies is intertwined with broader processes of meaning making and self-understanding in later life. Rather than positioning digital legacy planning solely as a technical or administrative task, this emerging line of research indicates that it is already being experienced and interpreted within developmental frameworks. Developmental theory provides a language for articulating why this connection may be significant. Erikson's psychosocial model describes the final stage of development as ego integrity versus despair, in which individuals seek coherence and meaning in their life narrative [12,21]. Expanding on this framework, King and Wynne [19] introduced the concept of family integrity, emphasizing the relational dimension of later-life development. Family integrity involves maintaining continuity, shared meaning, and connection across generations through reflection, communication, and intentional legacy practices. Viewed through this lens, socially engaged forms of digital legacy planning can be interpreted as contemporary contexts in which older adults negotiate identity, values, and responsibility within family systems.

The social dimension of digital legacy planning is central to the present study and reflects a growing consensus in recent scholarship that digital legacies are shaped by multi user and multi generational dynamics rather than by purely individual processes [10]. Complementary societal analyses further show that preparedness for digital afterlife issues is unevenly distributed and closely tied to patterns of digital access, literacy, and social context, indicating that engagement with digital legacy practices is socially structured and embedded in everyday relational environments [24]. When approached collaboratively, digital legacy planning may therefore function as a shared learning activity within families, creating opportunities for reflection, dialogue, and reciprocal exchange. Research on intergenerational learning suggests that such informal collaborative experiences can foster relationship building and shared understanding across generations [35]. Taken together, these perspectives position digital legacy planning as an intentional social practice through which older adults may engage with questions of identity, responsibility, and connection in later life, extending beyond a purely technical understanding of the activity. The present study adopts this social framing as a core premise, examining digital legacy planning as a relational process whose design and adoption have implications for adult development and family integrity.

With this perspective in mind, the central challenge is not simply to argue that digital legacy planning can be understood as a socially and developmentally meaningful practice, but to understand

how such a practice can be intentionally designed, encouraged, and adopted among older adults. If digital legacy planning is to function as a process that supports adult development, family integrity, and intergenerational learning, its uptake cannot be left to chance. Existing disparities in awareness and engagement suggest that without intentional strategies, participation is likely to remain uneven and shaped by broader differences in access and resources [24,37]. This unevenness could limit both older adults' opportunities to benefit from socially engaged planning processes and adult educators' ability to design interventions that support meaningful participation. Addressing this problem requires a framework capable of examining how new practices are interpreted, communicated, and taken up within social systems, while identifying leverage points for fostering more intentional and equitable adoption.

Embracing Diffusion of Innovations theory to examine digital legacy planning as a socially constructed process provides a coherent framework for addressing this challenge. Diffusion of Innovations (DOI) conceptualizes the spread of new ideas as a process shaped by interpersonal networks, social influence, and shared meaning within communities [28]. Because the framework is explicitly concerned with how preventive and socially consequential practices are interpreted and adopted within social systems, and with how communication strategies can be designed to influence that process, it may offer tools for understanding not only whether older adults engage in digital legacy planning but how such engagement might be intentionally supported and shaped [28]. Situating digital legacy planning within DOI therefore allows the present study to move from establishing its developmental and relational significance to examining the conditions under which a socially oriented approach to planning can be meaningfully adopted.

The present study proposes a quantitative design that systematically examines the perceptual and relational factors shaping older adults' intention to engage in digital legacy planning. To do so, it operationalizes Moore and Benbasat's [22] Perceived Characteristics of Innovation framework to measure how older adults evaluate a socially framed, study specific conceptualization of digital legacy planning introduced through a standardized video presentation. By linking perceived innovation attributes and social influence to behavioral intention, the study aims to generate empirically grounded insights into how a socially oriented model of digital legacy planning is perceived and how intention to engage in it is formed among older adults, in order to inform the design of intentional approaches to digital legacy planning that are developmentally meaningful.

2. LITERATURE REVIEW AND THEORETICAL FRAMEWORK

The introduction established digital legacy planning as a socially embedded practice with developmental significance for older adults and identified uneven adoption as a central research problem. It also proposed Diffusion of Innovations theory as the analytic framework capable of examining how a socially oriented approach to digital legacy planning can be intentionally supported and adopted. The present section elaborates that framework in three steps. First, it clarifies the key features of Diffusion of Innovations that make it suitable for studying socially embedded practices. Second, it defines digital legacy planning as the specific preventive innovation under investigation and stabilizes its conceptualization through a standardized model presented to participants for empirical study. Third, it explains how Diffusion of Innovations is operationalized through Moore and Benbasat's Perceived Characteristics of Innovation framework to examine behavioral intention.

2.1. Diffusion of Innovations as a Framework for Socially Embedded Adoption

This study conceptualizes digital legacy planning through the lens of Diffusion of Innovations (DOI) theory, positioning it as a preventive innovation and as a socially embedded practice whose adoption depends on communication within relational networks. Diffusion of Innovations provides a framework for examining how new practices are interpreted, communicated, and adopted within social systems. Rogers [28] defines diffusion as the process by which an innovation is communicated through certain channels over time among members of a social system. From this perspective, adoption is not solely an individual cognitive decision but a socially situated process shaped by interpersonal communication, shared norms, and network structures. Individuals reduce uncertainty about new ideas

by relying on the evaluations of trusted peers and opinion leaders, making diffusion a process through which meanings are negotiated and stabilized through interaction [28].

A central strength of DOI is that it supports both explanation and intentional design. Beyond describing how innovations spread, diffusion theory has increasingly been used to guide the development of interventions intended to accelerate the adoption of socially consequential practices. Dearing [8] argues that diffusion concepts can be operationalized early in intervention development to increase the likelihood that new practices achieve external validity and broad uptake rather than remaining isolated demonstrations. In practical terms, this orientation directs attention to how potential adopters will perceive an innovation and to how communication strategies can mobilize existing social networks to support uptake.

Applications of DOI in educational and clinical contexts illustrate how this design perspective can address research-to-practice gaps. Dingfelder and Mandell [9], for example, applied diffusion theory to autism interventions in community and school settings to explain why empirically supported programs often fail to achieve sustained adoption. Their analysis showed that administrators' decisions were shaped less by abstract evidence of efficacy than by perceived fit with organizational capacities, stakeholder values, and everyday practice realities. Using DOI as a framework, they proposed redesign strategies that incorporated stakeholder participation, attention to contextual compatibility, and early planning for sustainability. This work demonstrates that DOI can function as a practical tool for aligning intervention design with the social and contextual conditions that govern adoption.

For the present study, this design orientation is directly relevant to a social approach to digital legacy planning. When digital legacy planning is understood as a relational practice that unfolds within families and social networks rather than as an isolated technical task, its adoption depends on how it is communicated, modeled, and socially legitimized. DOI provides a framework for theorizing how such a practice circulates through interpersonal networks, how social influence shapes willingness to engage, and how communication strategies can stimulate reflection and dialogue within those networks [8,27]. In particular, DOI highlights the potential of narrative and socially mediated communication, including entertainment–education approaches, to embed preventive messages within engaging contexts that invite shared interpretation and discussion [27].

The relevance of DOI becomes especially clear when digital legacy planning is framed as a preventive innovation. Rogers [28] defines preventive innovations as new ideas that require action at one point in time in order to avoid unwanted consequences at some future time. Such innovations are difficult to diffuse because their benefits are delayed, uncertain, or invisible, and because successful adoption is marked by the absence of observable problems rather than by immediate rewards [27,28]. Digital legacy planning exemplifies these structural diffusion challenges. Many individuals perceive it as new or unfamiliar, and few established social expectations exist regarding when, how, or with whom planning should occur [4,10]. Effective digital legacy planning requires action before cognitive decline, incapacity, or death, because preparedness is a central component of what has been described as a “good digital death”, whereas lack of preparation is closely associated with forms of digital loss and disruption that characterize a “bad digital death” [30]. Failure to engage can produce unwanted consequences, including emotional distress for surviving family members, logistical difficulties in managing digital materials, and unintended or misleading representations of the deceased's identity [10]. In addition, lack of engagement represents a missed opportunity for older adults to participate in practices that support family integrity and intergenerational learning.

Preventive innovations differ not only from incremental innovations but also from one another in the degree to which their enactment is standardized. Rogers [28] observes that some preventive innovations involve relatively discrete and uniform behaviors, such as fastening an automobile seat belt, whereas others, such as family planning, encompass broad categories of practice shaped by personal values, social relationships, and cultural context. Digital legacy planning more closely resembles the latter category. Research in digital legacy studies consistently indicates that no singular or standardized approach exists. Individuals may engage in planning through a range of activities, including organizing digital files, documenting account information, adjusting platform-specific settings, engaging in conversations with family members, or using commercial services designed to manage digital assets [4,10]. Existing technological tools address only part of a broader and highly individualized planning process.

Within this preventive innovation framework, framing digital legacy planning in this way provides a theoretically grounded basis for identifying its diffusion challenges and for informing the design of future learning and communication strategies. Research on preventive innovations indicates that adoption frequently depends on multipronged communication strategies that engage both cognitive and social processes. Rogers [27] emphasizes the importance of activating peer networks, engaging champions, and using entertainment–education strategies that embed preventive messages within engaging narrative formats. For a socially oriented model of digital legacy planning, these principles suggest concrete pathways for designing interventions that invite families to engage collectively with questions of digital legacy rather than positioning planning as a private administrative task.

2.2. Standardizing the Innovation: A Conceptual Prototype of Digital Legacy Planning

Although the preceding section established digital legacy planning as a preventive innovation suited to analysis within Diffusion of Innovations theory, defining the object of diffusion presents an additional challenge. Digital legacy planning is not enacted as a single, uniform practice but as a heterogeneous set of activities distributed across social and technological contexts. Research on death and afterlife technologies documents diverse practices surrounding digital materials, including preservation, stewardship, delegation of access, and purposeful curation, suggesting that what counts as planning is often expressed as a cluster of related behaviors rather than as one standardized procedure [1,10]. This heterogeneity complicates empirical investigation because diffusion analysis assumes that potential adopters are evaluating a recognizable innovation that functions as a shared object of meaning within a social system [28]. Without some degree of conceptual stabilization, participants would effectively be evaluating different objects when responding to the study. Studying adoption therefore requires an explicit act of conceptual stabilization that defines what constitutes the innovation under examination.

At the same time, the absence of a rigid standard for digital legacy planning can be understood as a strength rather than a limitation, particularly from a postdigital perspective. Postdigital scholarship emphasizes that digital practices are shaped by situated positionalities and by the entanglement of digital and nondigital dimensions of everyday life, allowing meanings and uses to be reconfigured across contexts [15]. Within this landscape, digital legacy planning is inherently customizable, and this flexibility permits designers and educators to orient the practice toward different aims. The present study intentionally leverages this openness to configure digital legacy planning as an opportunity for adult development. Moving the practice beyond a narrow focus on technical management within human–computer interaction, we draw on developmental and educational frameworks to specify a version of digital legacy planning that foregrounds reflection, communication, and relational engagement.

Operationalizing this flexibility requires translating broad developmental aims into concrete features of the innovation. From this perspective, digital legacy planning is organized as a socially mediated process that can support later-life developmental tasks. Scholarship on digital legacy highlights the importance of curation as a practice through which individuals select, organize, and present digital materials in order to convey meaning to others [10]. In other words, curation can be expressive rather than merely administrative, involving the articulation of identity and values. This dimension resonates with the concept of family integrity, which King and Wynne [19] describe as a developmental orientation centered on shared reflection, open communication, and the transmission of stories and values across generations. In this configuration, collaborative digital legacy planning provides a concrete context for storytelling and joint meaning making, as older adults and family members interpret digital artifacts, articulate values, and situate personal memories within a shared family narrative [10,19].

Intergenerational learning research further clarifies how such engagement functions as a shared educational activity. Intergenerational learning involves reciprocal exchange in which participants from different generations jointly construct knowledge and strengthen relationships through collaborative projects [35]. According to this literature, learning is socially situated and most effective when participants share commitment, engage as partners, and work toward a common purpose. Collaborative digital legacy planning may contain these core elements by creating a structured project in which older and younger family members exchange technical skills, personal histories, and cultural meanings while

working toward a shared outcome. In this sense, digital legacy planning can function not only as a preventive practice aimed at mitigating future difficulties but also as a present-oriented learning process that supports relational development and shared meaning making within families [35].

In addition to these relational and developmental dimensions, practical elements remain essential. Research consistently shows that access management, preservation decisions, and stewardship responsibilities are central concerns in digital legacy work [10]. A viable conceptualization of the innovation must therefore integrate logistical preparation with reflective and relational processes.

Building on this literature, the present study introduces a minimal conceptual prototype of digital legacy planning defined by three interrelated components:

First, the innovation is framed as a collaborative process involving an older adult and at least one significant other.

Second, it centers on guided reflection about digital identity, values, and preferences, expressed through the curation, creation and organization of digital materials.

Third, it culminates in the creation of a tangible communicative artifact, such as a documented set of wishes or curated collection intended for family members.

Together, these components constitute a cluster of practices that participants can perceive as a coherent innovation oriented toward both practical preparation and developmental engagement.

This prototype is intentionally partial and situated. It reflects assumptions about family communication and social support most directly aligned with Western contexts and may not capture all forms of digital legacy practice. Some scholarship, for example, explores visions of digital immortality that emphasize persistent or interactive digital personas and raise questions about long-term hosting, platform governance, and infrastructural maintenance [32]. The present study does not prescribe specific technological arrangements or storage architectures, recognizing that decisions concerning preservation, access, and long-term maintenance may be incorporated differently depending on individual priorities, values, and relational contexts. Instead, the prototype establishes a minimal structural framework centered on collaborative engagement, reflective curation, and the creation of a communicative artifact, while allowing participants to define the content, scope, and technical dimensions of that artifact in ways that are meaningful within their own postdigital life contexts. Questions concerning how curated materials are stored, accessed, or maintained therefore remain open and may themselves become part of the artifact produced through the planning process.

The aim is not to prescribe a universal model but to construct a theoretically grounded exemplar that stabilizes the innovation for empirical study. In the present research, this conceptual model is instantiated through a standardized video representation that introduces participants to a shared version of socially oriented digital legacy planning. The prototype serves as a research stimulus that anchors evaluation and enables systematic examination of how older adults perceive the innovation and form intentions to engage with it. The following section explains how these perceptions are operationalized through an established framework for measuring innovation attributes and behavioral intention.

2.3. Perceived Innovation Attributes and Intention to Engage in Digital Legacy Planning

Having established a standardized conceptual prototype of digital legacy planning as a collaborative, reflective, and artifact-producing preventive innovation, attention now turns to the theoretical lens used to examine how such an innovation may be taken up. Within Diffusion of Innovations theory, adoption is shaped not simply by the existence of an innovation, but by how it is perceived by potential adopters [28]. For this reason, the present study draws on Moore and Benbasat's [22] Perceived Characteristics of Innovation framework, which provides a systematic approach for examining how individuals interpret and evaluate an innovation and how those evaluations relate to behavioral intention.

Moore and Benbasat's framework represents a significant conceptual refinement of Rogers' original formulation of innovation attributes. While Rogers identified five core attributes that influence adoption, he emphasized that it is individuals' perceptions of these attributes, rather than their objective features, that drive decision making [28]. This emphasis on perception is especially well suited to the study of digital legacy planning. As discussed earlier, digital legacy planning lacks a single, standardized form and is not widely understood or routinely practiced [4,10]. Although the present study introduces boundaries that define a socially driven prototype, it intentionally does not prescribe a

single correct form of planning. Individuals' evaluations of its value, difficulty, and relevance are therefore likely to vary substantially based on personal experience, family context, and exposure to information. Examining perceived attributes allows the study to capture how older adults make sense of this preventive innovation in practice, rather than assuming a uniform or preexisting understanding of what digital legacy planning entails.

Consistent with Diffusion of Innovations theory and Moore and Benbasat's operationalization, the present study examines five perceived innovation attributes: perceived relative advantage, perceived compatibility, perceived complexity, perceived trialability, and perceived observability [22,28]. Each attribute represents a distinct dimension through which older adults may evaluate the collaborative digital legacy planning prototype and form an intention to engage in the practice.

Perceived relative advantage refers to the extent to which digital legacy planning is viewed as offering benefits compared to not engaging in the practice [22,28]. For preventive innovations, relative advantage is often difficult to discern because successful adoption results in avoided future problems rather than immediate gains [27,28]. In the context of collaborative digital legacy planning, perceived advantages may include peace of mind, reduced burden on family members, and opportunities for shared reflection and intentional meaning making [10]. However, these benefits may not be salient to individuals with limited awareness of digital legacy issues, making perceived relative advantage a particularly fragile yet important predictor of behavioral intention.

Perceived compatibility reflects the degree to which digital legacy planning is perceived as consistent with an individual's existing values, life experiences, and self-concept [22,28]. In this context, compatibility concerns whether engaging in collaborative planning feels congruent with personal orientations toward responsibility, reflection, and care for others in later life. Practices that support relational continuity and value transmission may be perceived as more compatible than practices that conflict with norms around privacy, autonomy, or avoidance of mortality-related topics [19,21]. Perceived compatibility thus links diffusion theory to adult development perspectives by focusing on the individual's sense of fit with the practice.

Perceived complexity captures the extent to which digital legacy planning is experienced as difficult to understand or enact [22]. In the present prototype, complexity encompasses both technological demands and the perceived challenge of initiating reflective and interpersonal conversations about digital legacy. Such judgments are shaped by prior experience, technological confidence, emotional readiness, and the availability of social support [28], and may vary widely among older adults.

Perceived trialability refers to the extent to which individuals believe they can engage with an innovation on a limited or incremental basis [28]. Although preventive innovations are often difficult to trial in traditional ways, collaborative digital legacy planning may allow for partial engagement, such as initiating a single conversation, organizing a subset of digital materials, or experimenting with a small component of the planning process [10]. The perception that engagement can begin through manageable steps may support intention formation among individuals who experience uncertainty or apprehension.

Perceived observability captures the degree to which the existence or consequences of an innovation are visible within one's broader social and informational environment [22,28]. For preventive innovations, observability is often limited because benefits are defined by the absence of future negative events [27]. In the context of digital legacy planning, observability may arise through media exposure, public discourse, or witnessing how families manage digital materials after a death. Observing examples of collaborative planning or its absence may shape how older adults evaluate the relevance and consequences of the practice [10].

While these five perceived attributes provide a robust foundation for understanding intention formation, they do not fully capture the socially embedded nature of digital legacy planning as a relational and intergenerational process. Diffusion of Innovations theory emphasizes that adoption unfolds within social systems and is shaped by interpersonal communication and normative influence [28]. To address this dimension, the present framework is extended to incorporate two social influence constructs tailored to the collaborative prototype.

The first construct captures explicit encouragement, reflecting the extent to which older adults perceive direct suggestions or conversations from family members, friends, or caregivers regarding

digital legacy planning. This dimension is grounded in Rogers' emphasis on interpersonal channels and opinion leadership as mechanisms of diffusion [28].

The second construct captures perceived social value, reflecting the extent to which individuals believe that engaging in collaborative digital legacy planning is meaningful or beneficial for their family or social system. This construct aligns with digital legacy scholarship emphasizing that planning decisions are made with future recipients in mind [10] and with adult development perspectives highlighting motivations to preserve relational continuity in later life [19].

Together, the five perceived innovation attributes and the two social influence constructs form the conceptual model guiding the present study. They are treated as predictors of older adults' behavioral intention to engage in the socially framed digital legacy planning prototype, allowing systematic examination of how perceptual and relational factors jointly shape intention. In the present study, all perceived attributes are evaluated in relation to the socially embedded prototype of digital legacy planning introduced to participants prior to measurement, ensuring that responses are anchored to a shared yet open understanding of the innovation.

2.4. Hypotheses and Conceptual Model

Guided by Diffusion of Innovations theory and Moore and Benbasat's [22] Perceived Characteristics of Innovation framework, the proposed study is designed to examine behavioral intention to engage in digital legacy planning as the primary dependent variable. Behavioral intention is particularly appropriate in this context because digital legacy planning is a preventive innovation whose adoption may not result in immediate, observable behavior, but instead involves a readiness or commitment to act in the future [27,28]. Moore and Benbasat's framework builds on Rogers' work by explicitly incorporating insights from Davis' Technology Acceptance Model, positioning behavioral intention as a key outcome shaped by individuals' perceptions of an innovation's characteristics. This conceptual focus allows the proposed design to assess early adoption processes, specifically intention formation, while recognizing that digital legacy planning can be enacted in multiple ways, even as it is represented in this study through a partially standardized collaborative prototype. In the present study, behavioral intention is understood not only as an individual cognitive orientation toward action, but as an orientation toward participation in a socially embedded and relational practice that participants evaluate through a shared conceptual framing.

Consistent with Diffusion of Innovations theory and Moore and Benbasat's operationalization, the study examines five perceived innovation attributes as predictors of behavioral intention: perceived relative advantage, perceived compatibility, perceived complexity, perceived trialability, and perceived observability [22,28]. These attributes capture how older adults evaluate digital legacy planning as an innovation and how those evaluations shape their willingness to engage. In this study, intention and perceived attributes are assessed relative to a shared conceptualization of digital legacy planning introduced to participants prior to measurement, which presents the innovation as a socially embedded practice situated within participants' everyday postdigital relational lives. In addition to perceived innovation attributes, and in recognition of the socially embedded nature of digital legacy planning, the study incorporates two distinct dimensions of social influence as additional predictors of intention.

Based on the preceding literature, the following hypotheses are proposed:

H1. Perceived relative advantage of digital legacy planning will be positively associated with older adults' behavioral intention to engage in digital legacy planning.

H2. Perceived compatibility of digital legacy planning with older adults' values, life experiences, and relational commitments will be positively associated with behavioral intention to engage in digital legacy planning.

H3. Perceived complexity of digital legacy planning will be negatively associated with behavioral intention to engage in digital legacy planning.

H4. Perceived trialability of digital legacy planning will be positively associated with behavioral intention to engage in digital legacy planning.

H5. Perceived observability of digital legacy planning will be positively associated with behavioral intention to engage in digital legacy planning.

Social influence is conceptualized as operating through two complementary pathways that reflect the relational realities of digital legacy planning.

H6a. Perceived explicit encouragement from family members, friends, or other significant others will be positively associated with older adults' behavioral intention to engage in digital legacy planning.

H6b. Perceived social value of digital legacy planning within one's family or broader social system will be positively associated with older adults' behavioral intention to engage in digital legacy planning.

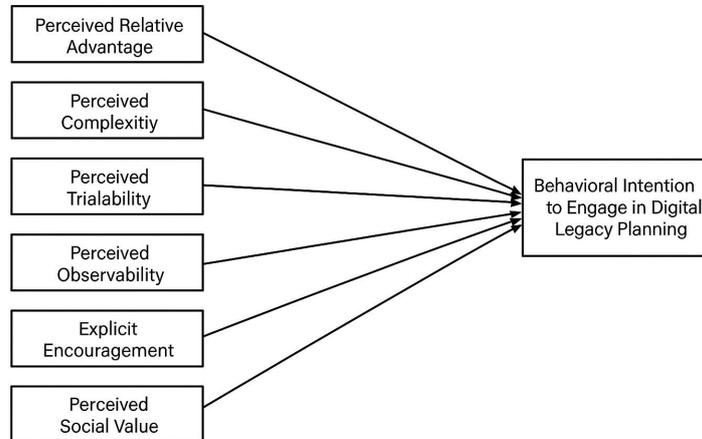


Figure 1. Conceptual Model of Predictors of Behavioral Intention to Engage in Digital Legacy Planning

Figure 1 presents the conceptual model guiding the present study. The model illustrates perceived innovation attributes and social influence variables as independent predictors of behavioral intention to engage in digital legacy planning. Specifically, perceived relative advantage, perceived compatibility, perceived complexity, perceived trialability, perceived observability, explicit encouragement, and perceived social value are modeled as direct predictors of behavioral intention. Behavioral intention to engage in digital legacy planning serves as the dependent variable, reflecting older adults' readiness to engage in this preventive practice as represented by the partially standardized collaborative prototype, while recognizing that it may be enacted in multiple ways. The model integrates Diffusion of Innovations theory with digital legacy scholarship and adult development perspectives, highlighting both perceptual and social pathways through which intention formation may occur.

3. PROPOSED METHODOLOGY

The purpose of the present study is to examine factors that shape older adults' behavioral intention to engage in digital legacy planning, conceptualized as a preventive innovation that is most meaningfully understood as a socially embedded and relational process. Building on Diffusion of Innovations theory, Moore and Benbasat's [22] Perceived Characteristics of Innovation framework, and digital legacy scholarship, the study seeks to identify how perceived innovation attributes and social influence jointly contribute to intention formation.

To address this purpose, the study employs a quantitative, cross-sectional survey design. This design is appropriate not only because the study seeks to test theoretically derived hypotheses and examine relationships among multiple predictors, but also because it closely follows the methodological logic established by Moore and Benbasat in their original work. Moore and Benbasat explicitly designed their framework to be examined through survey-based measurement of perceptions and behavioral intention, drawing on Diffusion of Innovations theory and Davis' Technology Acceptance Model. By adopting this same analytic strategy, the present study aligns its methodological approach with the theoretical tradition from which we draw the core constructs.

This study treats digital legacy planning as a practice that unfolds within a postdigital environment in which digital technologies are integrated into everyday relational and educational life, and therefore examines intention as orientation toward participation in a socially situated adult learning process. From a research design perspective, postdigital scholarship functions as a contextual framework that informs how digital legacy planning is conceptualized and presented to participants, rather than as a construct to be directly measured within the quantitative model. It situates the phenomenon within

postdigital adult education while leaving the empirical focus on perceived innovation attributes and social influence.

3.1. Research Design and Theoretical Alignment

The study follows a non-experimental, correlational research design. Diffusion of Innovations theory emphasizes that adoption decisions are shaped by how innovations are perceived, discussed, and interpreted within social systems rather than by their objective characteristics alone [28]. Moore and Benbasat [22] operationalized this insight by focusing on perceived innovation characteristics and modeling their relationship to behavioral intention. The present study adopts this logic by examining how perceived attributes of a socially framed digital legacy planning prototype predict intention to engage in the practice.

Behavioral intention to engage in digital legacy planning is treated as the primary dependent variable. This choice is grounded in both Diffusion of Innovations theory and the Technology Acceptance Model. Davis [5,6] demonstrated that intention serves as a reliable proximal indicator of adoption for complex behaviors, particularly when actual use may be delayed, intermittent, or difficult to observe. Moore and Benbasat extended this logic beyond workplace technology use, positioning behavioral intention as a key outcome of perceived innovation attributes. This approach is especially appropriate for digital legacy planning as a preventive innovation, whose enactment may be delayed and whose benefits are primarily future-oriented and not immediately observable.

3.2. Population and Sampling

The target population for the present study consists of older adults aged 60 years and above who engage with digital technologies in everyday life, such as email, social media platforms, cloud storage, or online accounts. This population is appropriate given the study's focus on digital legacy planning, which presupposes the existence of digital assets and some degree of digital engagement. Prior digital legacy scholarship has emphasized that individuals with limited or no digital presence may not meaningfully confront digital legacy issues at all, making digital engagement a necessary condition for studying digital legacy planning behaviors [10].

Participants will be recruited from the Kissing Tree community, an age-restricted residential development for adults aged 55 and older located in San Marcos, Texas, in close proximity to the university where the study is being conducted. This site was selected for several reasons. First, it offers access to a large and active population of older adults, many of whom regularly engage with digital communication tools, online services, and social platforms. Second, the community's existing infrastructure for digital communication, including email newsletters and online resident forums, supports efficient recruitment for an online survey. Third, the geographic proximity of the site facilitates coordination with community stakeholders while maintaining a clear boundary between the research team and participant recruitment.

The target sample size for the study is between 200 and 300 participants. This range is justified both statistically and theoretically. General guidelines for multiple regression analysis recommend a minimum of 10 to 15 participants per predictor variable. With seven predictors included in the final model, a sample of this size provides adequate statistical power to detect medium-sized effects. In addition, Moore and Benbasat's [22] field testing relied on samples of comparable magnitude when examining relationships between perceived innovation characteristics and adoption-related outcomes, further supporting the appropriateness of this range.

3.3. Measures and Instruments

Data will be collected using a structured, self-administered online questionnaire delivered through Qualtrics. The instrument is explicitly modeled on Moore and Benbasat's [22] Perceived Characteristics of Innovation framework, which operationalizes Diffusion of Innovations theory by focusing on individuals' perceptions of innovation attributes and their relationship to behavioral intention. Moore and Benbasat's work represents a critical extension of Rogers' framework by making the distinction between objective attributes and perceived characteristics explicit and by integrating insights from Davis's Technology Acceptance Model.

The core of the instrument consists of items measuring five perceived innovation attributes: perceived relative advantage, perceived compatibility, perceived complexity, perceived trialability, and perceived observability. These constructs are drawn directly from Moore and Benbasat's operationalization and retain their original conceptual definitions. Items will be adapted to reflect the context of digital legacy planning while preserving the conceptual meaning of each construct. Adaptation will focus on wording changes rather than structural changes to maintain content validity. For example, references to "using a system" in the original instrument will be replaced with references to "engaging in digital legacy planning," while retaining the evaluative and comparative structure of the items. All items will be measured using seven-point Likert-type response scales, consistent with Moore and Benbasat's [22] original instrument, with response options ranging from strongly disagree to strongly agree.

Although Moore and Benbasat originally developed their instrument in the context of information technology adoption, Rogers [28] emphasized that perceived innovation characteristics are applicable across innovation types when appropriately contextualized. Digital legacy planning, while not reducible to a single technological artifact, frequently involves interaction with digital platforms and tools, making the adapted instrument conceptually appropriate for the present study.

The use of an online survey administered through Qualtrics functions as an intentional sampling filter rather than a methodological limitation. By requiring participants to engage with a digital survey platform, the study implicitly selects for older adults with a baseline level of digital literacy and access. This is theoretically consistent with the study's focus, as individuals without such digital engagement are less likely to possess digital assets or to meaningfully consider digital legacy planning [10]. The implications of this sampling focus for generalizability are addressed in the study's limitations.

The questionnaire also includes demographic and contextual items, such as age, gender, family structure, and frequency of digital tool use. These variables are collected to describe the sample and provide contextual information but are not treated as primary predictors in the core regression analyses.

3.4. Data Collection Procedures and Ethics

Data will be collected through an online survey administered in Qualtrics. Recruitment will occur through Kissing Tree community newsletters, email announcements, and resident forums, with support from community coordinators when appropriate. Recruitment materials will include a brief description of the study, eligibility criteria, and a direct link to the survey.

After opening the survey link, participants will first view an online informed consent form describing the study purpose, procedures, expected time commitment, voluntary participation, and privacy protections. Participants will indicate consent electronically before continuing. Participants will be informed that they may discontinue participation at any time without penalty.

To establish a shared conceptual baseline, participants will then view a brief, approximately five-minute informational video that presents a partially standardized collaborative prototype of digital legacy planning used in the present study as a socially embedded and relational process. The video will describe digital legacy planning as an activity that may involve reflection on personal values and identity, organization of digital materials, and communication with family members or other significant others about how digital assets should be understood and managed in the future. Examples may include discussing passwords and account access, preserving stories or meaningful digital content, and collaboratively considering what aspects of one's digital presence may be important to others. The purpose of the video is to ensure that all participants evaluate the same conceptualization of the innovation when responding to survey items, functioning as a research standardization tool that anchors participants' interpretations of digital legacy planning. To preserve this standardizing role, the video will be designed to present information in a neutral, descriptive manner, avoiding emotional appeals, calls to action, or messaging intended to encourage adoption. The standardized description presented in the video explicitly situates digital legacy planning within family relationships and intergenerational dialogue, reflecting the study's theoretical grounding in adult development and family integrity while ensuring that participants evaluate the innovation within a shared social and educational frame. The survey will then proceed to the questionnaire items assessing perceived innovation attributes, social influence, and behavioral intention.

Before full deployment, the survey (including the video and transition wording) will be pilot tested with a small group of eligible older adults to assess clarity, length, and item comprehension. Feedback will be used to refine wording and sequencing, consistent with Moore and Benbasat's multi-stage instrument development approach.

No personally identifying information will be collected. Responses will be stored in a secure, password-protected environment consistent with university data protection policies. Institutional Review Board approval will be obtained prior to recruitment and data collection.

3.5. Sample Constructs and Illustrative Items

To clarify how the proposed constructs are operationalized in the survey instrument, this section presents illustrative sample items adapted from Moore and Benbasat's [22] Perceived Characteristics of Innovation scales and extended to the context of digital legacy planning. The sample items are designed to operationalize digital legacy as defined by the collaborative prototype introduced in the study's video, ensuring alignment between measurement and the study's conceptual framework. These examples are provided for conceptual clarity; final item wording will be refined through pilot testing.

Perceived relative advantage is assessed through items that capture the extent to which digital legacy planning is viewed as beneficial compared to not engaging in the practice. An example item is: "Planning my digital legacy would make things easier for my family."

Perceived compatibility is measured by items assessing the alignment of digital legacy planning with participants' values and self-concept. Items in this category are framed to reflect not only personal values but also relational responsibilities and commitments to others. An example item is: "Digital legacy planning fits with my values and my responsibilities to people close to me."

Perceived complexity is captured through items reflecting the perceived difficulty of understanding or engaging in digital legacy planning. An example item is: "Digital legacy planning would be difficult to understand."

Perceived trialability is measured by items assessing whether individuals believe they can engage in digital legacy planning incrementally or experimentally. An example item is: "I could try digital legacy planning before fully committing."

Perceived observability is assessed through items reflecting exposure to others' experiences or examples of digital legacy planning. An example item is: "I have seen others engage in digital legacy planning."

Social influence as explicit encouragement captures direct interpersonal influence, such as: "People close to me have told me I should make plans for my digital legacy." Perceived social value captures implicit, relational influence oriented toward family benefit, such as: "I believe making plans for my digital legacy would help my children or grandchildren."

Behavioral intention to engage in digital legacy planning is measured using items adapted from prior technology adoption research. An example item is: "I intend to make plans for my digital legacy in the near future."

3.6. Planned Data Analysis

Data analysis will proceed in several stages, following the analytic strategy used by Moore and Benbasat [22] to examine how perceived innovation characteristics relate to adoption-related outcomes. Although digital legacy planning is conceptualized as a socially embedded and relational practice, quantitative analysis of individual perceptions provides an analytically tractable way to examine how older adults interpret and evaluate participation in that social process. This staged approach allows for careful assessment of measurement quality prior to hypothesis testing and aligns with Diffusion of Innovations research that emphasizes perceptions and intention rather than immediate behavior.

First, survey responses will be screened for incomplete cases, excessive missingness, and basic distributional properties. Cases with substantial missing data will be removed from the dataset. For items with minimal missingness, a simple imputation approach may be applied, with the specific procedure documented transparently. This screening step mirrors the preliminary data checks conducted by Moore and Benbasat during instrument testing and field validation.

Second, descriptive statistics will be calculated for all study variables, including means, standard deviations, and response distributions. These analyses will be used to summarize participant

characteristics and to identify items with limited variance or extreme skewness, which may indicate unfamiliarity with digital legacy planning or difficulty interpreting specific items.

Third, internal consistency reliability will be assessed for each multi-item scale using Cronbach's alpha. Consistent with Moore and Benbasat [22], alpha coefficients of .70 or higher will be treated as acceptable for this stage of research. Item-level diagnostics, including corrected item-total correlations and changes in alpha if items are deleted, will be examined if reliability concerns arise. Any item removal will be undertaken cautiously to preserve content validity and conceptual coverage of each construct.

All constructs will be operationalized as composite scores by averaging their respective items, following Moore and Benbasat's approach to scale construction. All items will be measured using a 7-point Likert-type scale ranging from 1 (strongly disagree) to 7 (strongly agree). This scaling choice is consistent with Moore and Benbasat's original instrument and with prior technology adoption research that emphasizes sensitivity to gradations in perception and intention.

Hypotheses will be tested using multiple linear regression analysis. Behavioral intention to engage in digital legacy planning will serve as the dependent variable. Independent variables will include perceived relative advantage, perceived compatibility, perceived complexity, perceived trialability, perceived observability, explicit encouragement, and perceived social value. This analytic strategy allows all predictors to be examined simultaneously and enables assessment of each variable's unique contribution while controlling for the others, consistent with Moore and Benbasat's use of multivariate techniques to examine adoption-related outcomes.

Statistical significance will be evaluated using an alpha level of .05. Standardized beta coefficients will be examined to assess the relative strength and direction of each predictor. In addition, overall model fit will be evaluated using R^2 and adjusted R^2 values, indicating the proportion of variance in behavioral intention explained by the full set of predictors while accounting for model complexity. Reporting adjusted R^2 is particularly appropriate given the inclusion of multiple predictors and aligns with Moore and Benbasat's emphasis on explaining variance in adoption-related outcomes rather than relying solely on individual coefficients.

Regression assumptions, including linearity, normality of residuals, homoscedasticity, and multicollinearity, will be assessed using standard diagnostic procedures. Variance inflation factors will be examined to ensure that multicollinearity does not compromise interpretation of individual predictors. In addition, graphical diagnostics, including residual plots and histograms, will be used to visually assess distributional properties and identify potential violations of model assumptions.

3.7. Applicability and Potential Adaptations

The findings of this study are intended to inform both theoretical understanding and practical intervention design related to digital legacy planning. Because the model isolates specific perceptual and social predictors of behavioral intention, the results can be used to inform targeted strategies rather than generic awareness efforts.

For example, if perceived observability emerges as a strong predictor of intention, this would suggest that older adults are more likely to consider digital legacy planning when they see others engaging in it. In this case, community-based adult learning initiatives could emphasize peer visibility through testimonials, digital storytelling events, or facilitated discussions in which older adults share their own experiences with digital legacy planning. Such approaches would increase the visibility of the practice and normalize it within social networks.

If perceived complexity is found to negatively influence intention, this would indicate that perceived difficulty, rather than lack of perceived value, deters engagement. In response, adult educators and service designers could develop simplified, step-by-step planning tools tailored to older adults' needs. These tools could be embedded within platforms older adults already use, such as estate planning services, health portals, or community education programs, reducing cognitive and emotional barriers to initial engagement.

If perceived compatibility and social influence are the strongest predictors, this would support framing digital legacy planning as a values-aligned, relational activity rather than as a technical or administrative task. In such cases, interventions could emphasize how planning aligns with care for family members, intergenerational responsibility, and shared meaning-making. Entertainment-

education strategies, such as short narrative videos or dramatized scenarios depicting families navigating digital legacies together, could be used to model planning as a socially meaningful activity rather than an isolated individual task.

More broadly, the model can function as a framework for assessing learner needs in adult education contexts. Patterns of strong, weak, or non-significant predictors would indicate whether barriers to engagement stem from lack of awareness, misalignment with values, perceived difficulty, or absence of social reinforcement. This allows future interventions to be designed strategically rather than assuming that information provision alone is sufficient.

4. CONCLUSION, CONTRIBUTIONS, AND LIMITATIONS

This study contributes to the literature by conceptualizing digital legacy planning as a preventive innovation that is most meaningfully understood as a socially embedded and relational process. By integrating Diffusion of Innovations theory, Moore and Benbasat's Perceived Characteristics of Innovation framework, digital legacy scholarship, and perspectives from adult development and intergenerational learning, the study extends existing models of adoption into a domain that has been largely examined through technical or design-oriented lenses. In doing so, the study situates digital legacy planning within emerging conversations in postdigital adult education, which view learning as embedded in everyday sociotechnical relations rather than confined to formal instructional settings and emphasize the entanglement of digital and nondigital experience in shaping adult development and social practice [13,26].

Methodologically, the study adapts a well-validated instrument to a novel context, demonstrating how perceived innovation attributes and social influence can be used to assess intention formation for practices that lack standardized enactment. Conceptually, it advances the argument that digital legacy planning is not merely a technical task, but a social learning practice through which older adults may engage in reflection, meaning-making, and intergenerational connection in the present. This framing aligns with postdigital perspectives that understand adult learning as unfolding within hybrid environments where technological infrastructures and human relationships are mutually shaping, reinforcing the relevance of digital legacy planning as both an educational and a preventive practice [13].

Several limitations should be acknowledged, particularly those related to sampling and measurement. One limitation of the proposed study concerns the intentional focus on digitally engaged older adults residing in an age-restricted community. While this sampling strategy is appropriate for examining early adoption processes among individuals who already interact with digital technologies, the findings may not generalize to older adults with lower levels of digital literacy or limited access to digital resources. Digital legacy planning may operate differently in populations experiencing technological exclusion. Prior research indicates that awareness of and engagement in digital legacy planning are uneven and influenced by differences in digital access, skills, and contextual resources [4,37]. Digital legacy scholarship has also emphasized the need to examine how social and structural conditions shape participation in digital legacy practices across diverse populations [10]. The reliance on self-reported intention does not capture whether or how planning behaviors unfold over time. Additionally, introducing participants to the concept through an informational video may influence perceptions, even when designed to be non-persuasive. From a postdigital perspective, this limitation underscores the challenge of studying practices that evolve within dynamic sociotechnical contexts and suggests the value of future longitudinal and mixed-method research capable of tracing how digital legacy planning develops over time within changing relational environments.

In addition to sampling constraints related to digital access, the present study is situated within a specific cultural context that may shape how digital legacy planning is perceived and evaluated. Diffusion of Innovations theory emphasizes that adoption processes unfold within social systems whose norms, values, and patterns of interpersonal influence vary across cultural settings [28]. Cross-cultural research has consistently shown that societies differ in the degree to which they emphasize individual autonomy versus collective responsibility, a distinction often described in terms of individualism and collectivism [16]. In cultural contexts characterized by stronger collectivist orientations and interdependent family structures, social influence and normative expectations may

play a more central role in shaping intention. Under such conditions, constructs related to explicit encouragement and perceived social value may exert greater influence on behavioral intention than in more individualistic settings, where personal evaluations of relative advantage or compatibility may carry comparatively greater weight. Because the present study examines older adults within a specific U.S. community, its findings should be interpreted as culturally situated rather than universally generalizable. Future research that compares digital legacy planning across diverse cultural contexts would be valuable for testing whether the relative importance of perceptual and social predictors varies systematically with cultural norms and intergenerational dynamics.

Despite these limitations, the study provides a theoretically grounded framework for initiating systematic empirical research on digital legacy planning as a preventive innovation. By situating digital legacy planning within Diffusion of Innovations theory, the proposed design establishes a foundation for examining adoption processes using a framework that has been operationalized across diverse domains to inform communication strategies and learning interventions related to preventive behavior. Given growing conceptual and empirical indications that socially engaged digital legacy planning may support reflection, relational continuity, and intergenerational meaning-making in later life, understanding how to encourage its adoption is both an educational and a practical concern. The present study therefore positions Diffusion of Innovations theory as a tool for identifying leverage points through which this relational practice can be more effectively communicated, supported, and integrated into everyday adult life. In this way, the study contributes to postdigital adult education by reframing digital legacy planning as a socially meaningful preventive practice and by providing an empirical pathway for designing strategies that can support older adults and families in engaging with it intentionally.

Funding Statement: This research received no external funding.

Contribution: The author solely conceived the study, developed the theoretical framework, conducted the literature review, and wrote and revised the manuscript.

Informed Consent Statement: Not applicable. This article does not report research involving human participants.

Data Availability Statement: No new data were created or analyzed in this study. Data sharing is not applicable to this article.

Conflict of Interest Statement: The author declares no conflict of interest.

Acknowledgments: The author would like to thank Dr. Bhagyashree Barhate for her valuable feedback and guidance during the development of this work, and Dr. Sarah Hayes for her thoughtful feedback and encouragement. Gratitude is also extended to Romina Olson for her support during its preparation.

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