CONFIDENTIAL (for internal distribution only).

Technology Use
in Active LDS Households
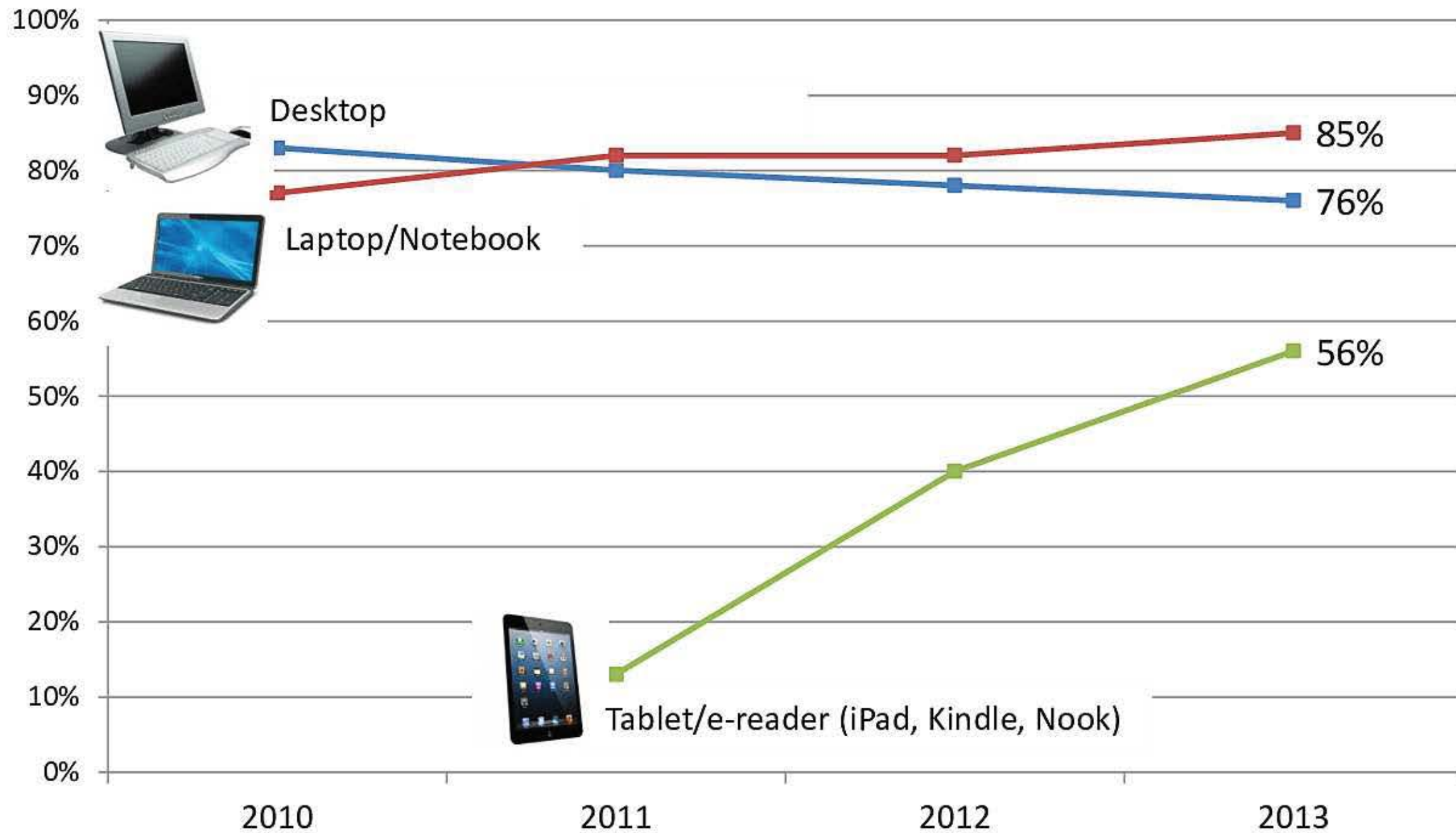
USA, 2010-2013

Study Background

The Research Information Division conducted an internet survey with LDS Church members ages 18 and above in the USA during April 2010-2013 (2010: n=883; 2011: n=776; 2012: n=860; 2013: n=1120). The 2013 sample represents an 85% response rate. <u>Survey respondents were active members that had access to a computer and the Internet.</u>

Small differences in percentages among the four years may be due to random sampling fluctuations and should not be seen as significant. Respondents who had more than one computer in their household were asked to respond about the one used most often. Annual information for 1991-2009 is also available upon request.
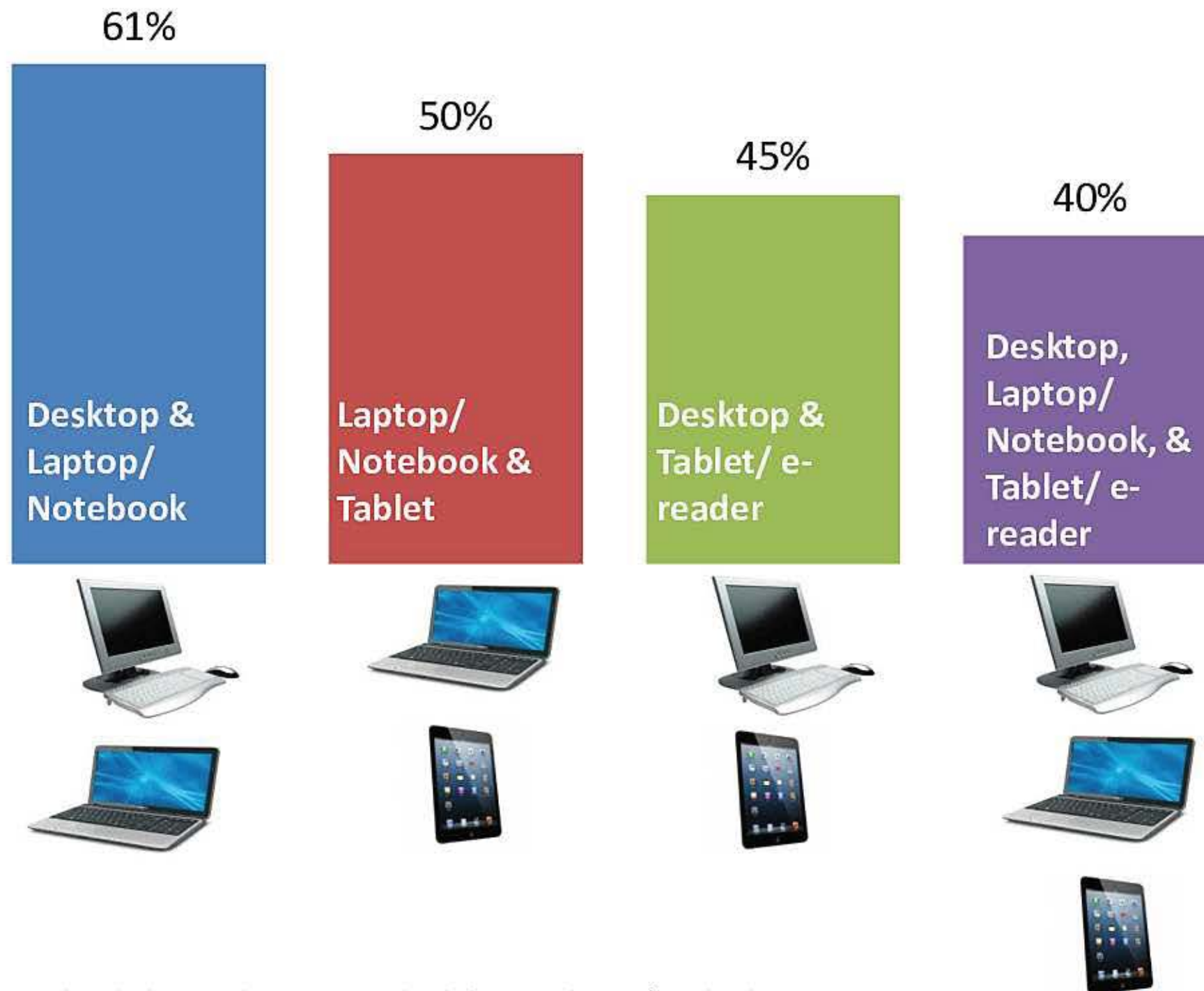
Computers in the Home

Desktop — 85%

Laptop/Notebook — 76%

Tablet/e-reader (iPad, Kindle, Nook) — 56%

Note: multiple responses allowed

3

Computers in the Home, 2013

(multiple computer ownership)

61%

Desktop & Laptop/ Notebook

50%

Laptop/ Notebook & Tablet

45%

Desktop & Tablet/ e-reader

40%

Desktop, Laptop/ Notebook, & Tablet/ e-reader

Note: 9% reported having only a desktop and 13% reported only having a laptop/notebook

Electronic Equipment or Service at Home

■ 2012 ■ 2013

99% 97%

93% 92%

42% 50%

37% 51%

5% 10%

5% 9%
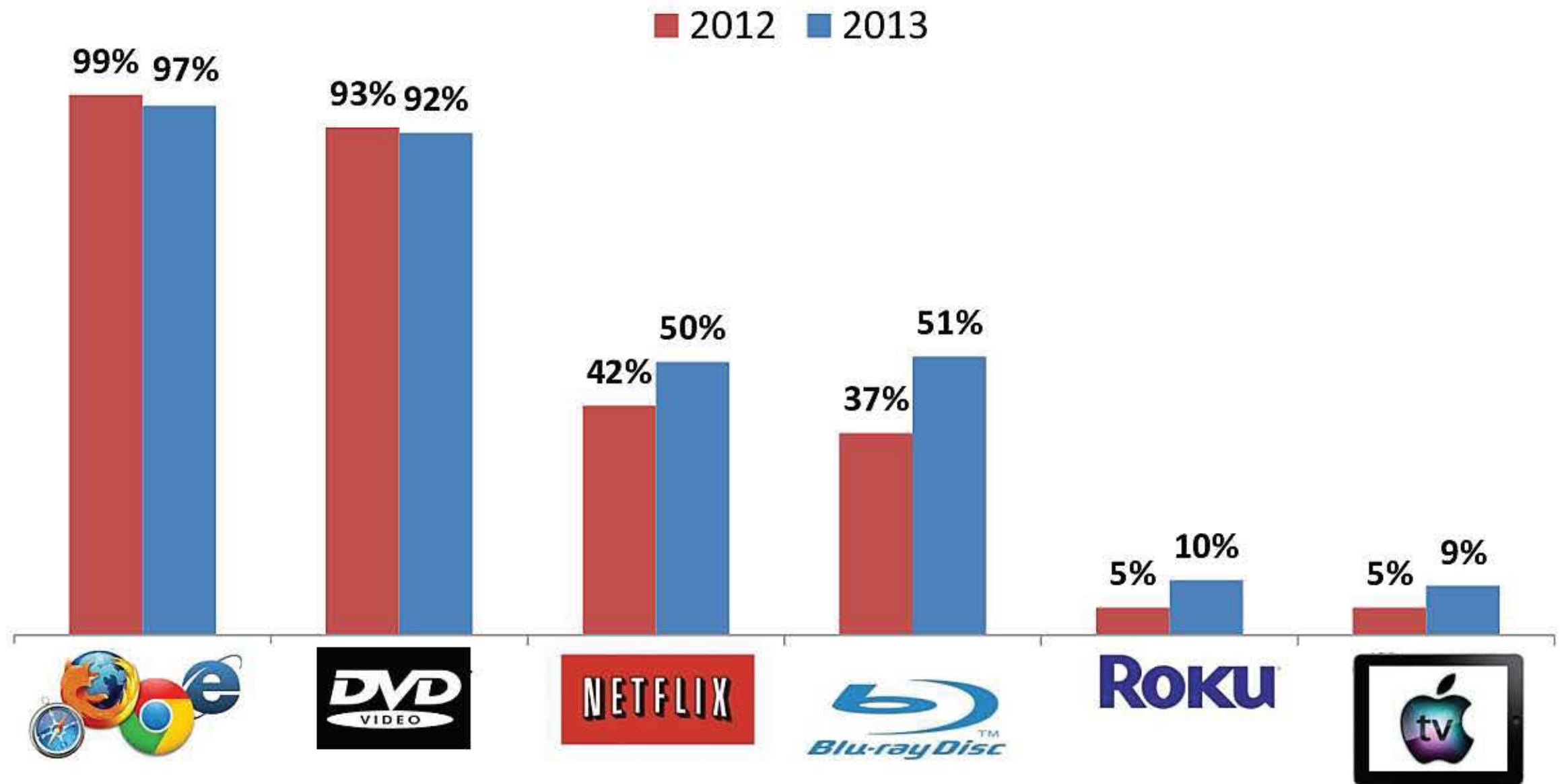
Note: multiple responses allowed, Hulu Plus data was 11% in 2013

Mobile Device Ownership

■ 2012 ■ 2013

97% **97%**

(91% USA Adults)*

64%
58%

44%

(42% USA Adults)*

32%

(34% USA Adults)*

21% **26%**

9% **14%**

7% **7%**

| Cell phone/ Smartphone | iPod/ MP3 player | Tablet (i.e. iPad, Galaxy) | Kindle | Nintendo DS | Nook |
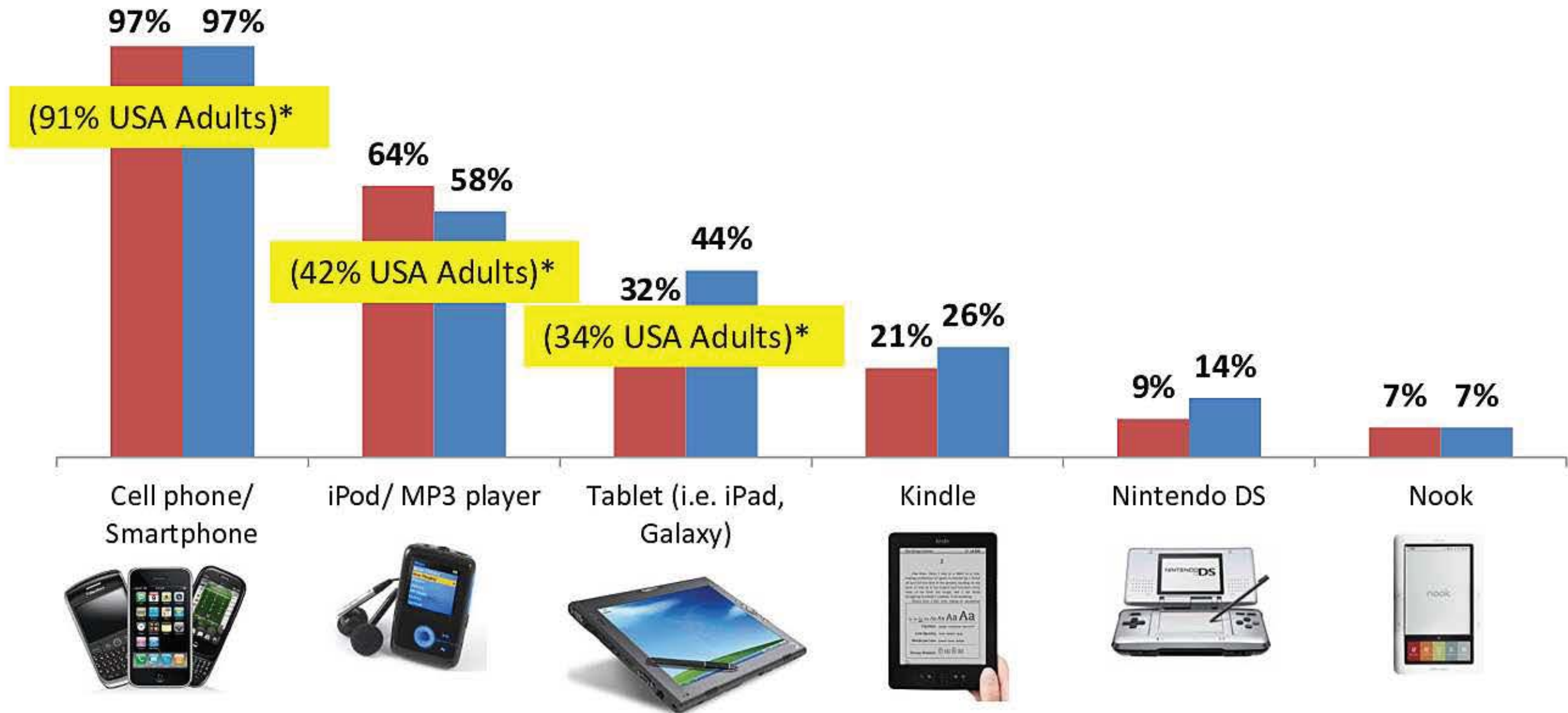
Note: multiple responses allowed
* Source: pewinternet.org, 2013

Web Browsers Used on Mobile Devices (2013)

Browser	%
Safari	51%
Chrome	27%
Internet Explorer	21%
Don't know	8%
Mozilla	5%
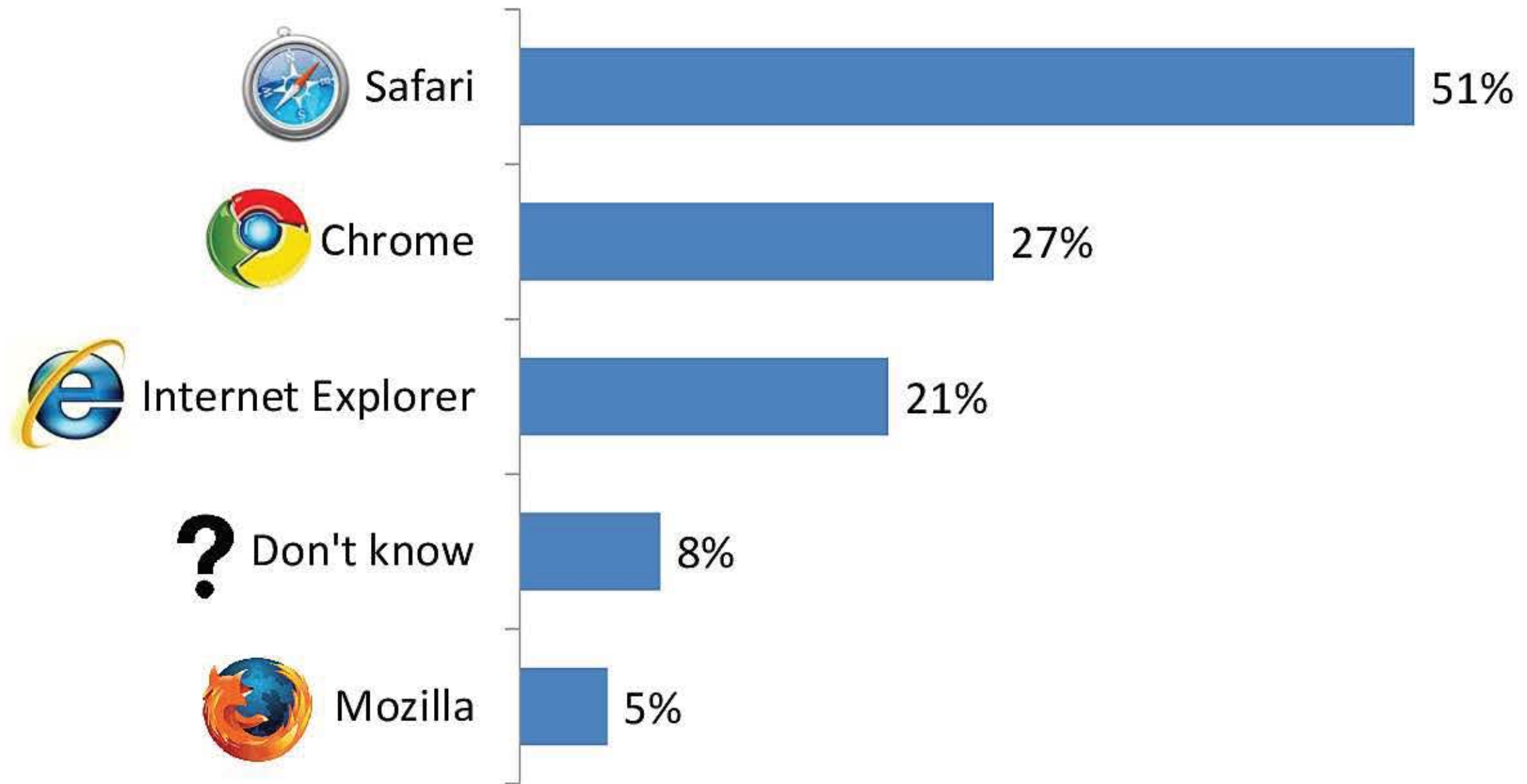
Note: % of mobile device owners

Type of Cell Phone

Smartphone
(56% USA Adults)*

Other cell phone
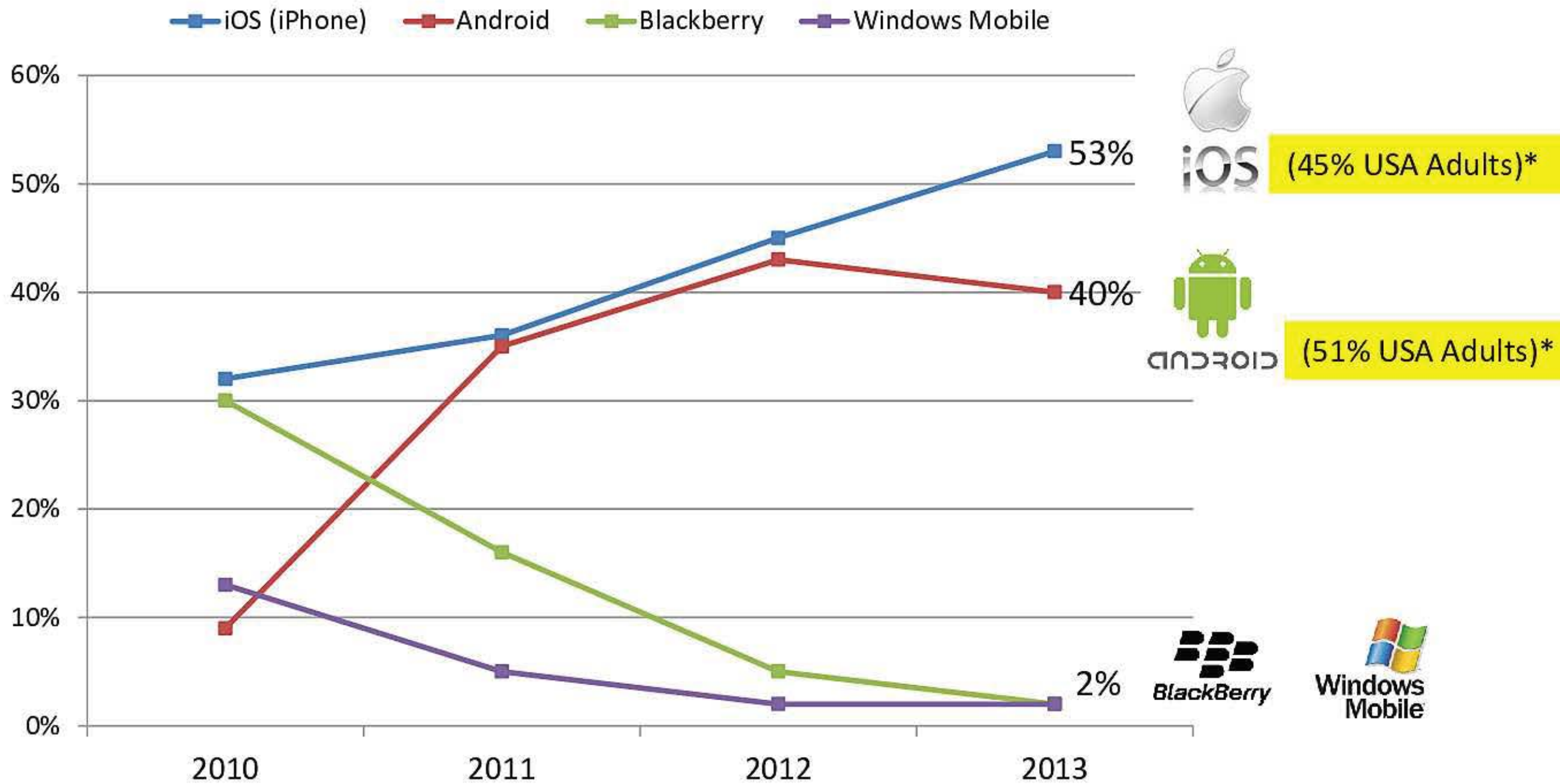(35% USA Adults)*

68%

58%

53%

49%

39%

37%

34%

2010   2011   2012   2013
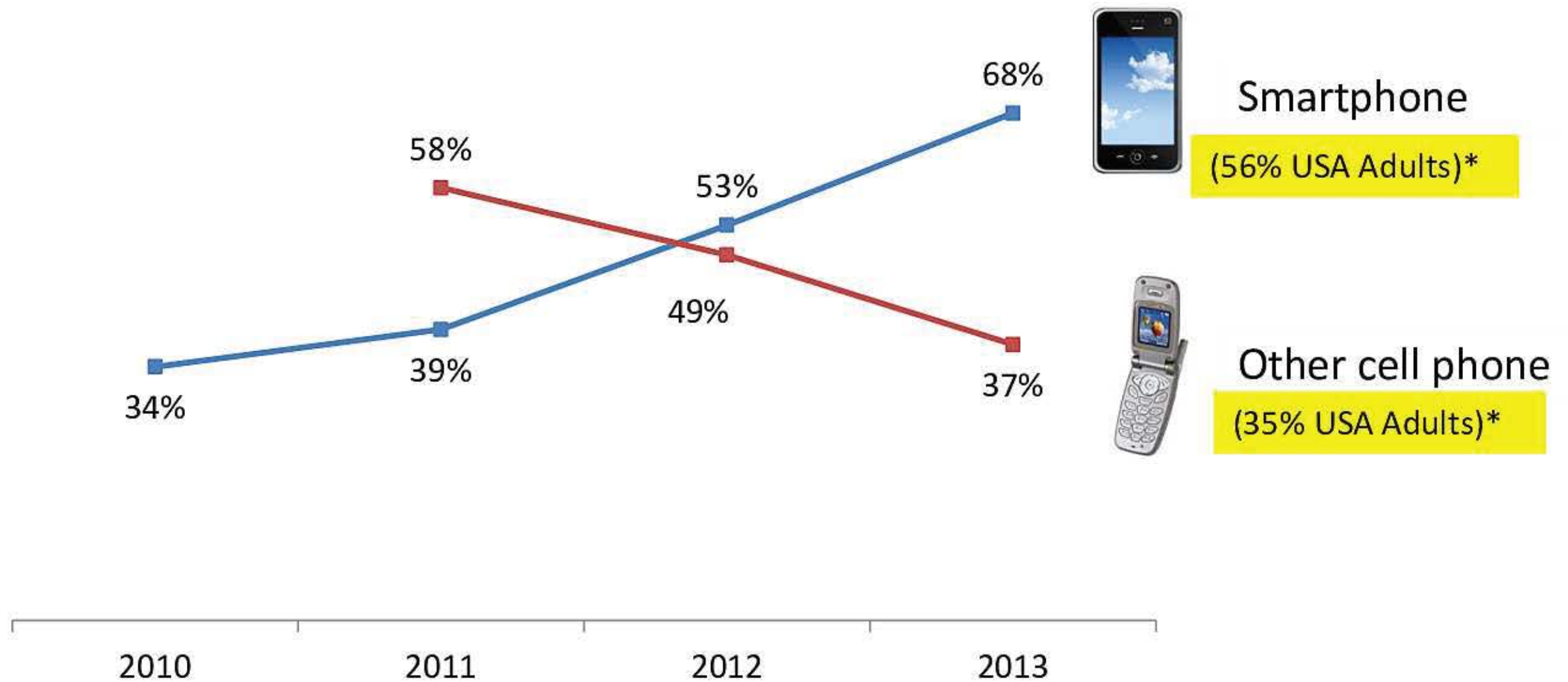
Note: % of cell phone owners, multiple responses allowed (some respondents reported owning both a Smartphone and other cell phone)
* Source: pewinternet.org, 2013

Smartphone Operating System

iOS (iPhone) ■ Android ■ Blackberry ■ Windows Mobile

iOS (45% USA Adults)*

ANDROID (51% USA Adults)*

53%

40%

2%

Note: Other operating systems for 2013 included Java ME 8= 1% and Symbian= 0%
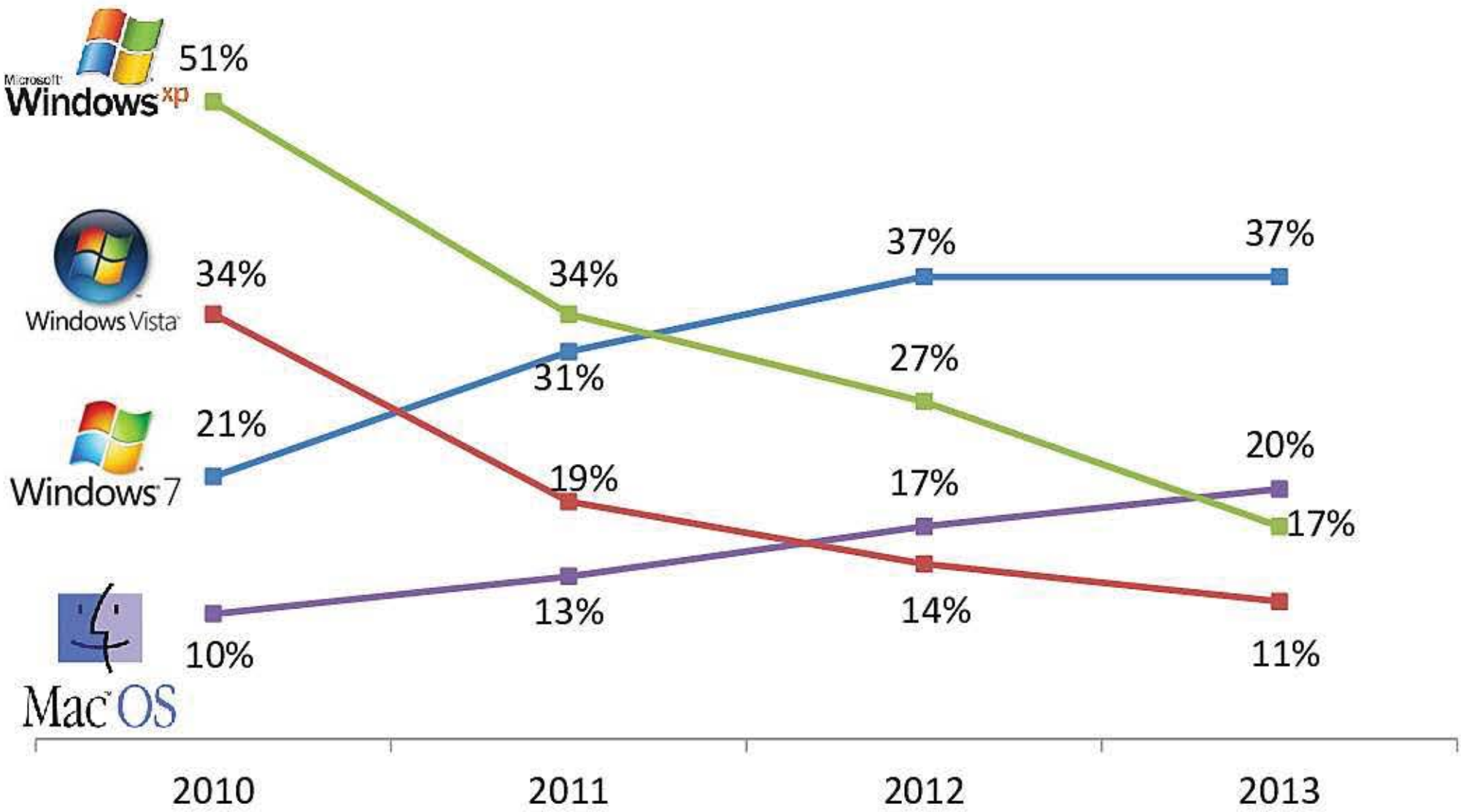   % of those who own a smartphone
* Source: pewinternet.org, 2013
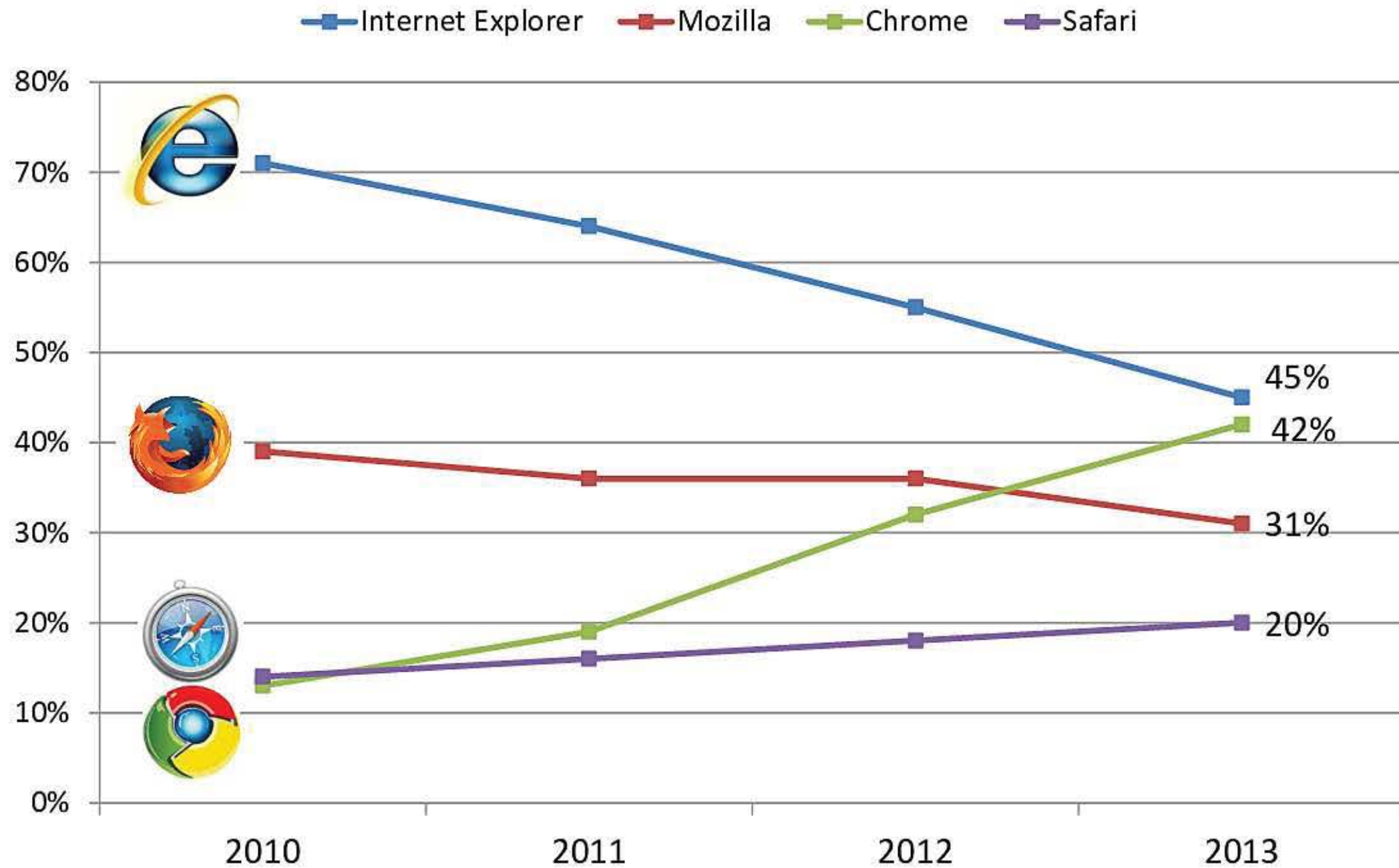
Operating System Used at Home
(primary computer)

Windows 7 — OS X (Mac) — Windows XP — Windows Vista

51%

37%   37%

34%   34%

31%

27%

21%

19%
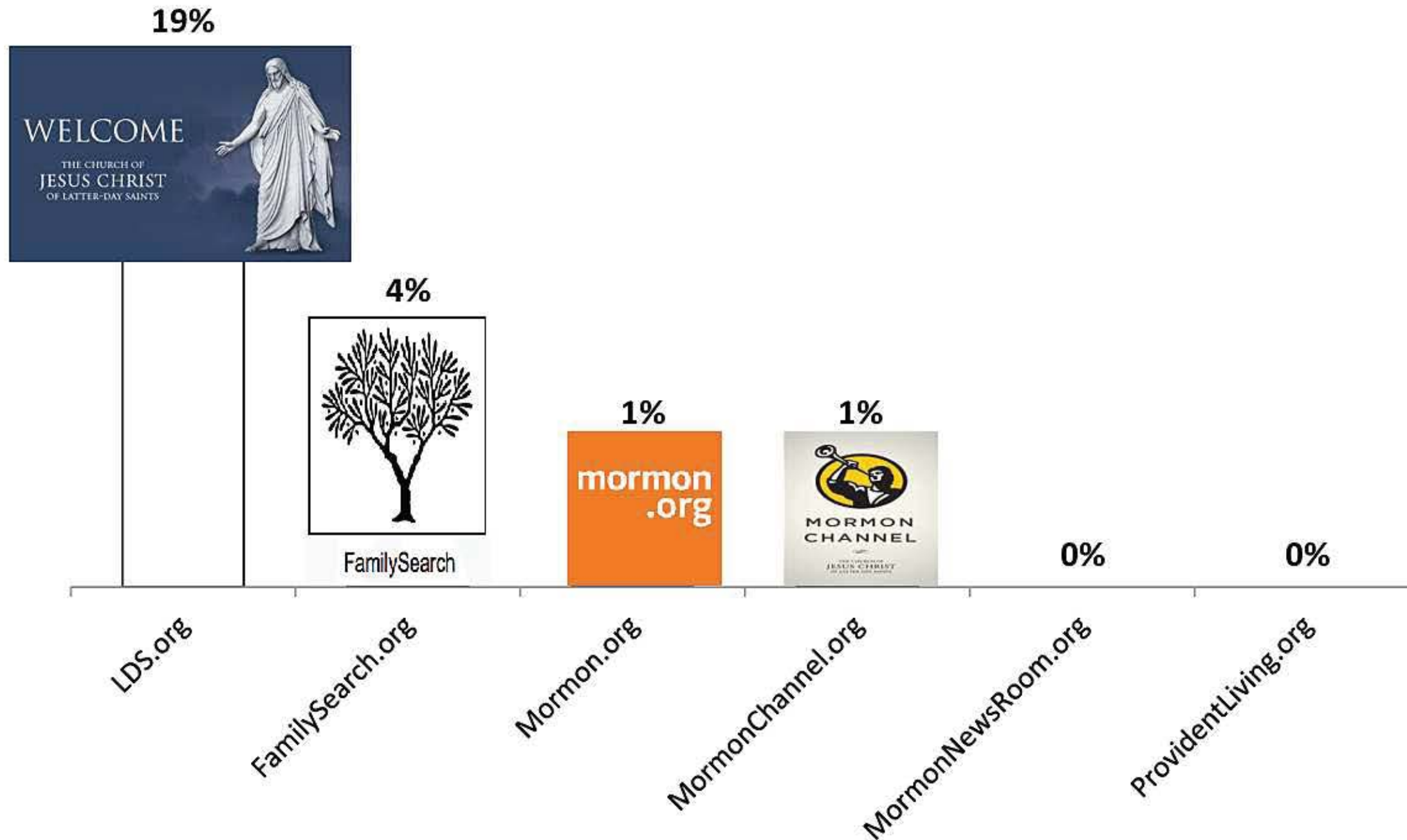
20%

17%

17%

13%   14%   17%

10%

11%

2010   2011   2012   2013

Note: Other operating systems for 2013 included Windows 8= 7% and Linux= 1%

10

Web Browser(s) Used at Home (primary computer)

Internet Explorer — Mozilla — Chrome — Safari

45%
42%
31%
20%

2010   2011   2012   2013

Note: Multiple response allowed

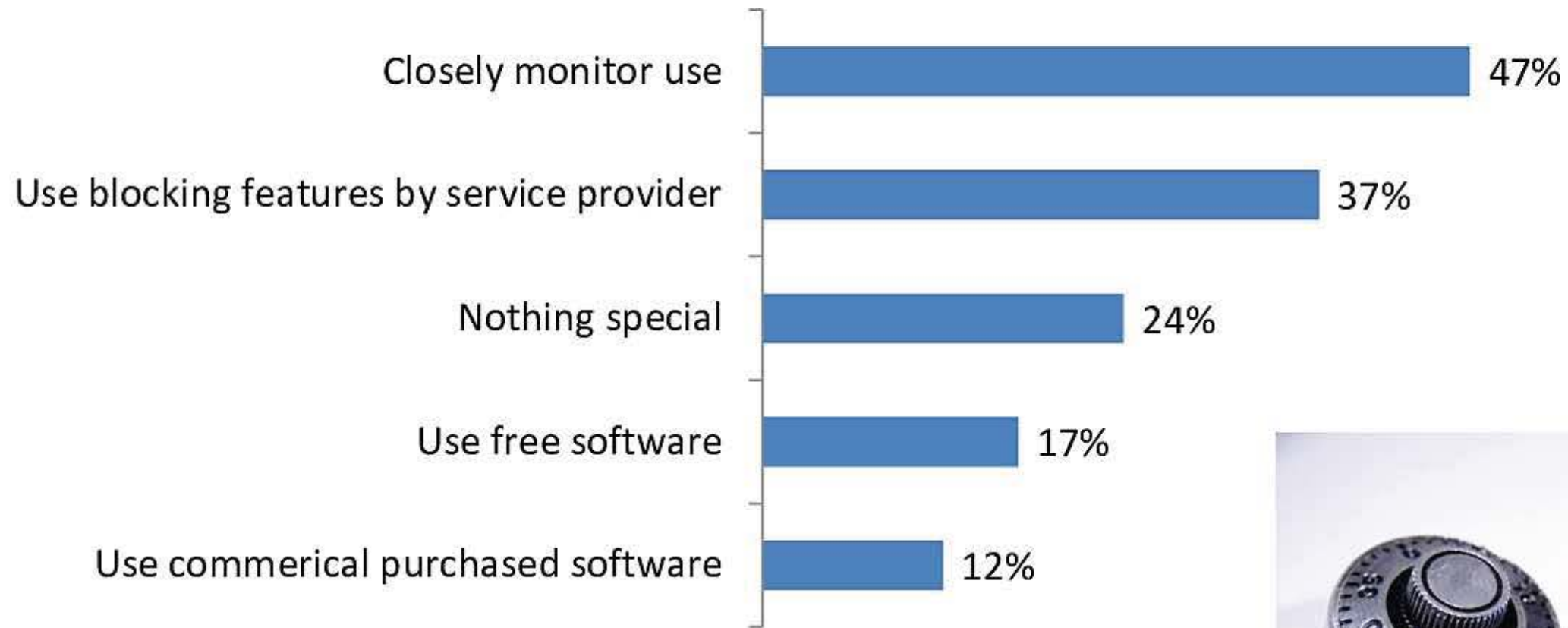# Website Used as Internet "home" page, 2013
(primary computer)

Note: FamilySearch.org includes new. FamilySearch.org
LDS.org as their homepage: median age =42 (age distribution= one-third are 18-30, one- third are 31-50, one-third are 51+)
FamilySearch.org as their home page: median age= 60

Measures Taken to Filter Internet Content (2013)

Closely monitor use: 47%

Use blocking features by service provider: 37%

Nothing special: 24%

Use free software: 17%

Use commerical purchased software: 12%

Note: These percentages have changed very little over the last four years.

Internet Activities (2013)

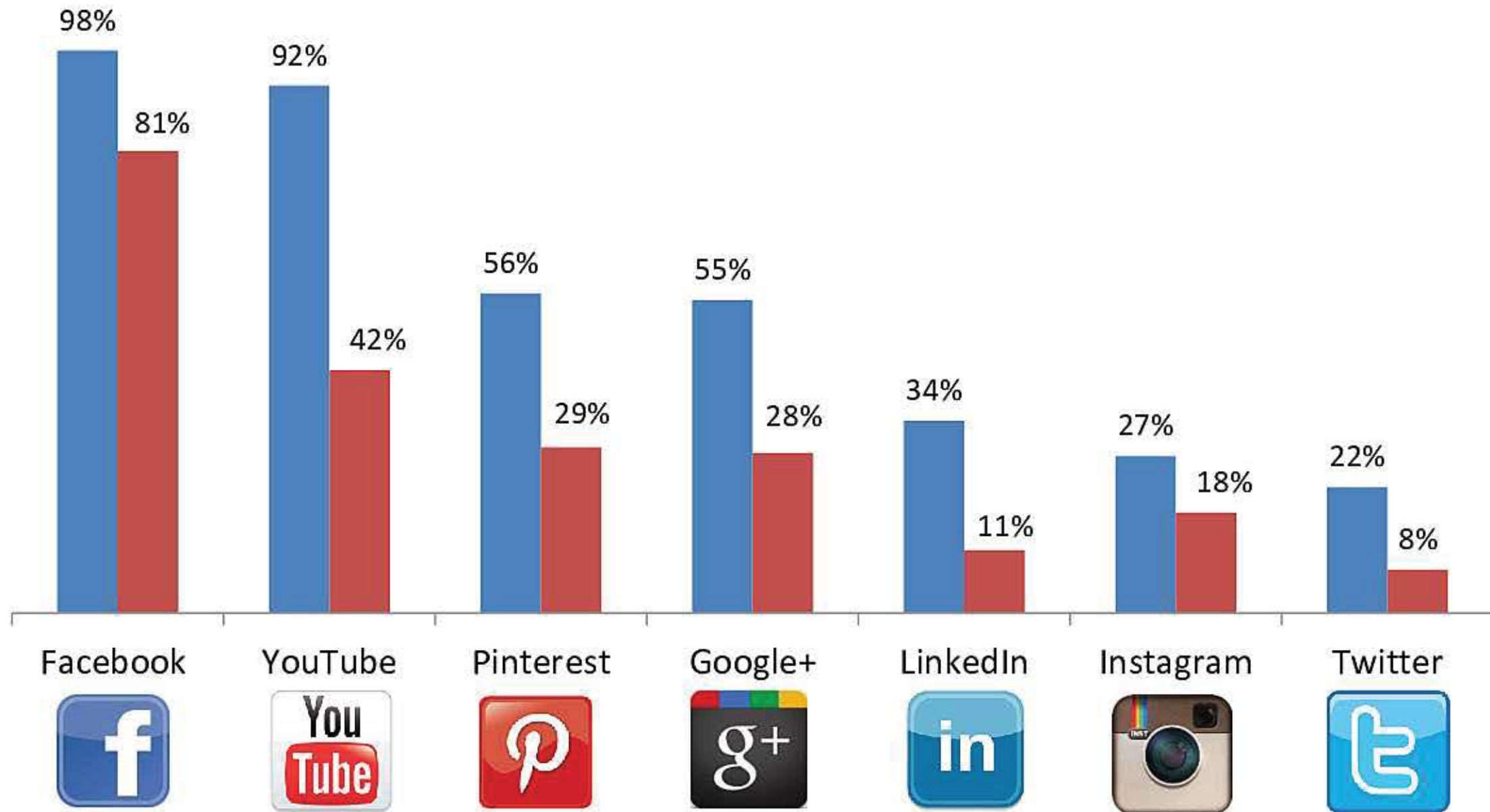| Activity	2013	2012
Email	97%	97%
Shopping/purchasing items	87%	78%
Online bill paying/ banking	84%	81%
Social networking	77%	67%
Education or learning	78%	78%
Streaming videos	69%	48%
Downloading software	60%	
Streaming audio	59%	
Voice or video chat	44%	28%
Playing games	40%	
Instant Messaging	33%	25%
Blogging	23%	20%
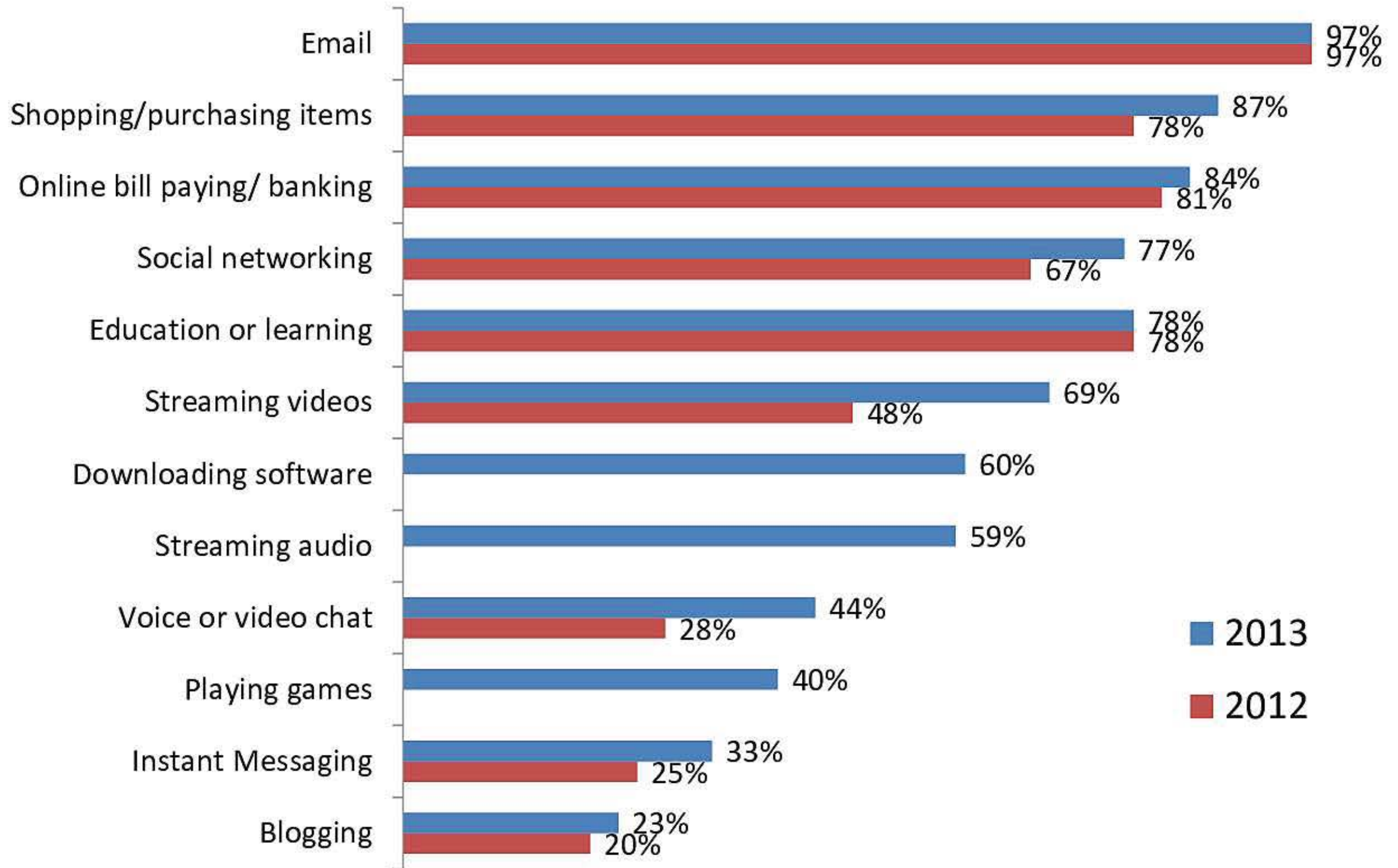
Note: % of internet users, multiple responses allowed

Use of Social Networking Sites (2013)

■ Ever used ■ Use once a week or more

	Facebook	YouTube	Pinterest	Google+	LinkedIn	Instagram	Twitter
Ever used	98%	92%	56%	55%	34%	27%	22%
Use once a week or more	81%	42%	29%	28%	11%	18%	8%

Note: % of those who use social networking sites, multiple responses allowed, Tumblr ever used= 4% and MySpace= 1%.

Use of a Mobile Device to Access Social Networking Sites (2013)

No
18%

Yes
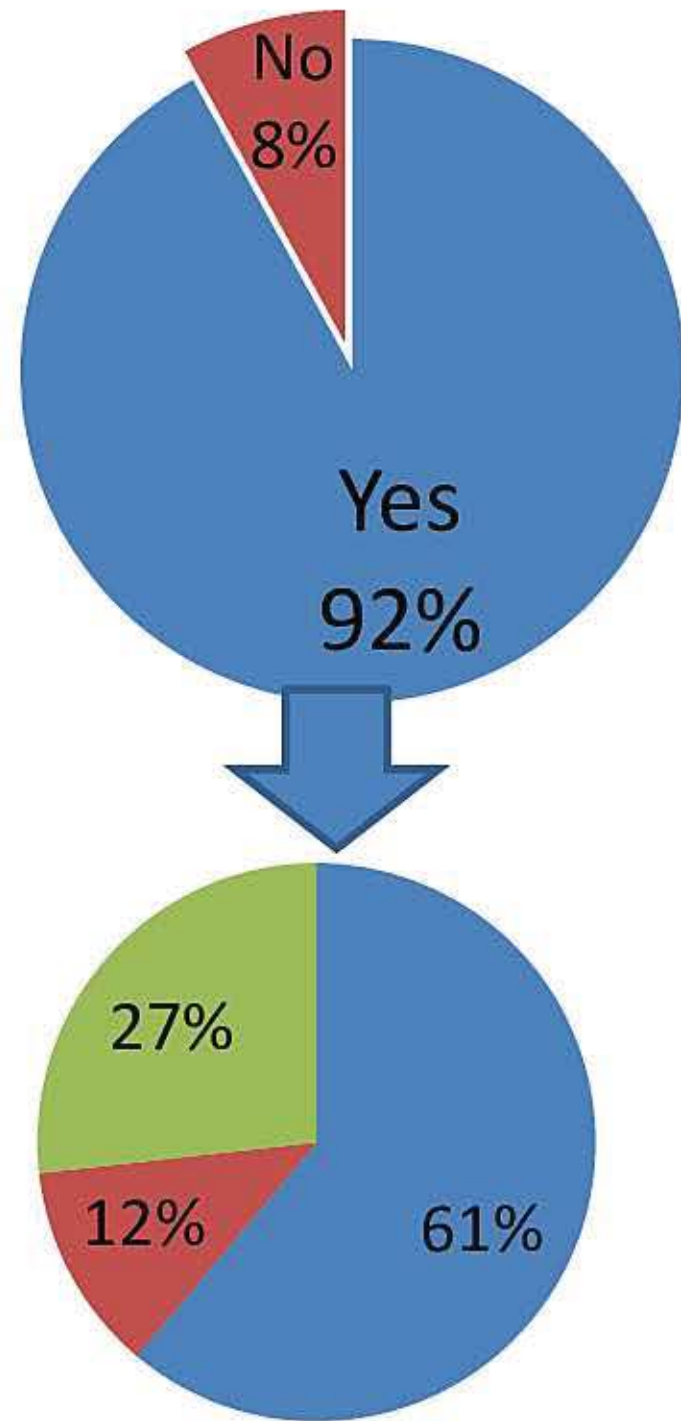82%

10%

10%

7%

53%

20%
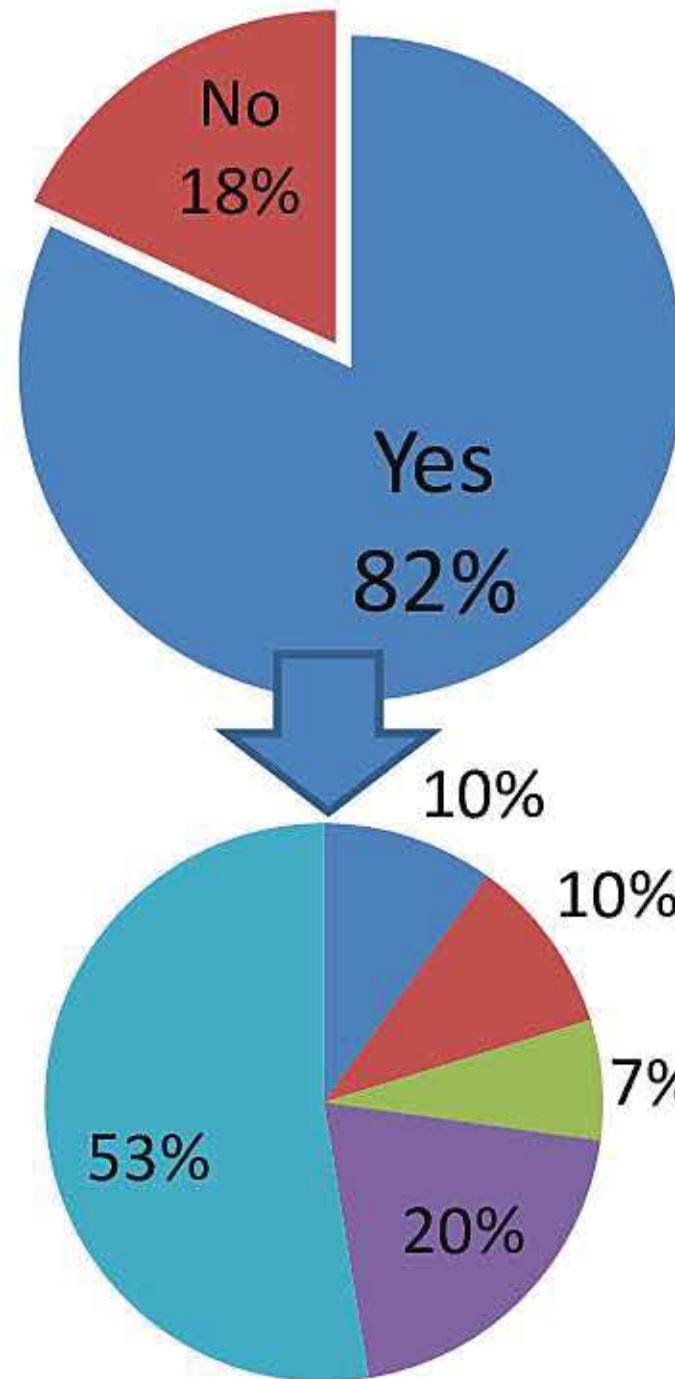
Frequency of Using Social Networking Sites

- Less than once a month
- A few times a month
- About once a week
- A few times a week
- Once a day or more

Note: % of those who use social networking sites and have a mobile device

Accessing Church Videos Online (2013)

Device Used to Access Church Videos Online

- Home computer
- Mobile device
- Both of the above, about equally

Note: % of those who access Church videos online

Electronic Communication with Members and Leaders

86%

91%

23%

28%

■ Communicate electronically with members and leaders

■ Ward or stake has its own social networking page

2012

2013
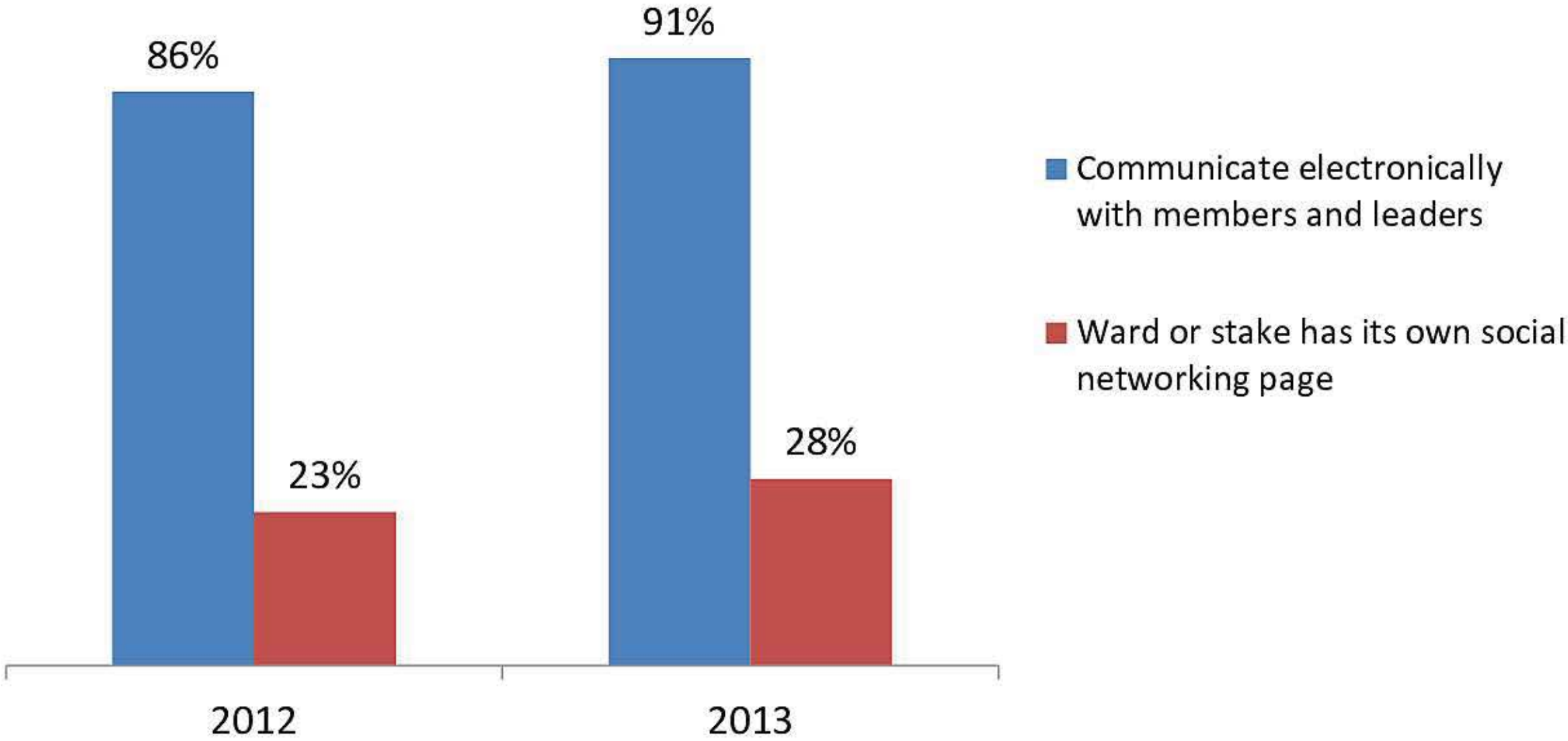
Note: social networking page examples included: Facebook, Google+, blogs, other.
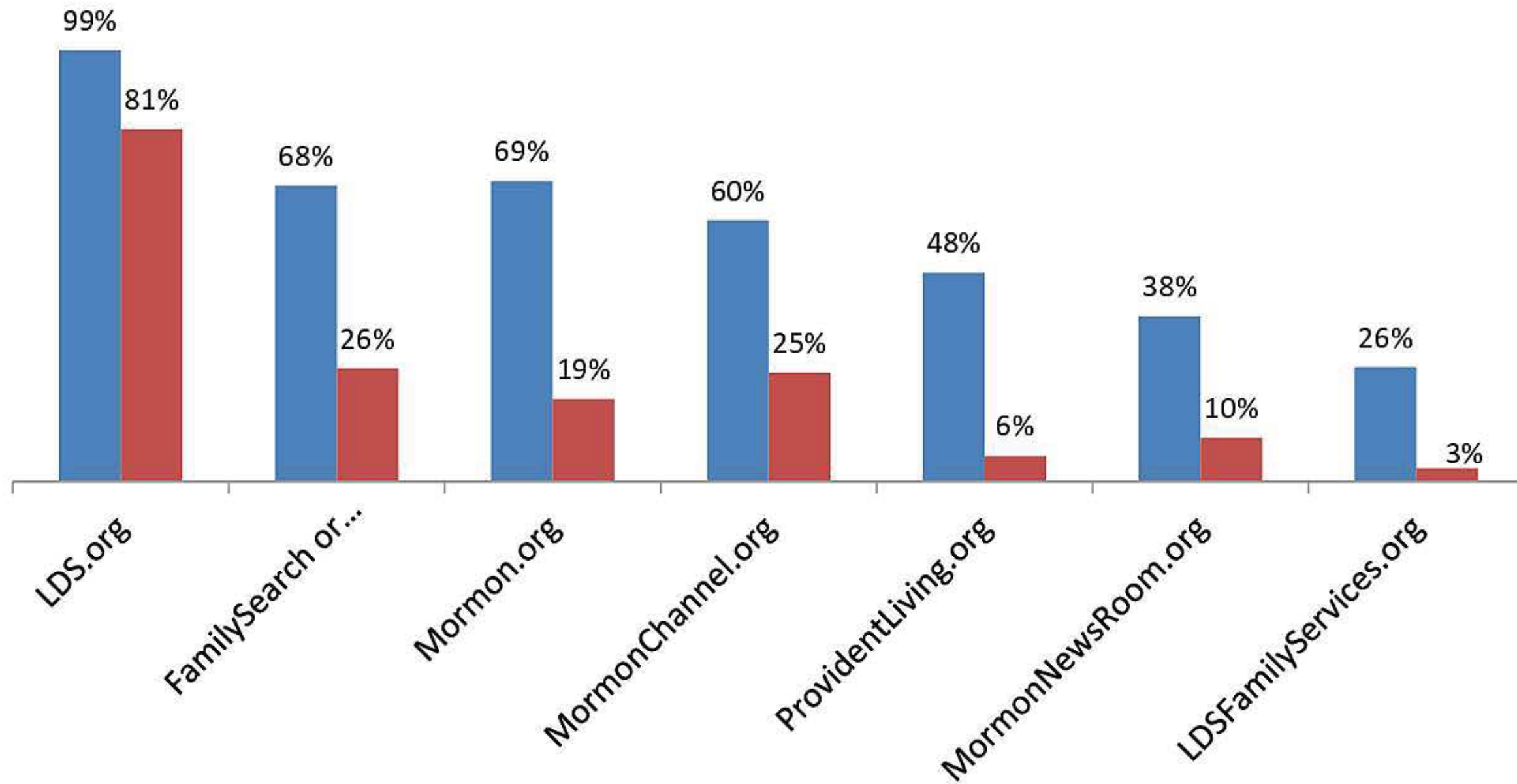
Electronic methods used to communicate with members and leaders

2011 2012 2013
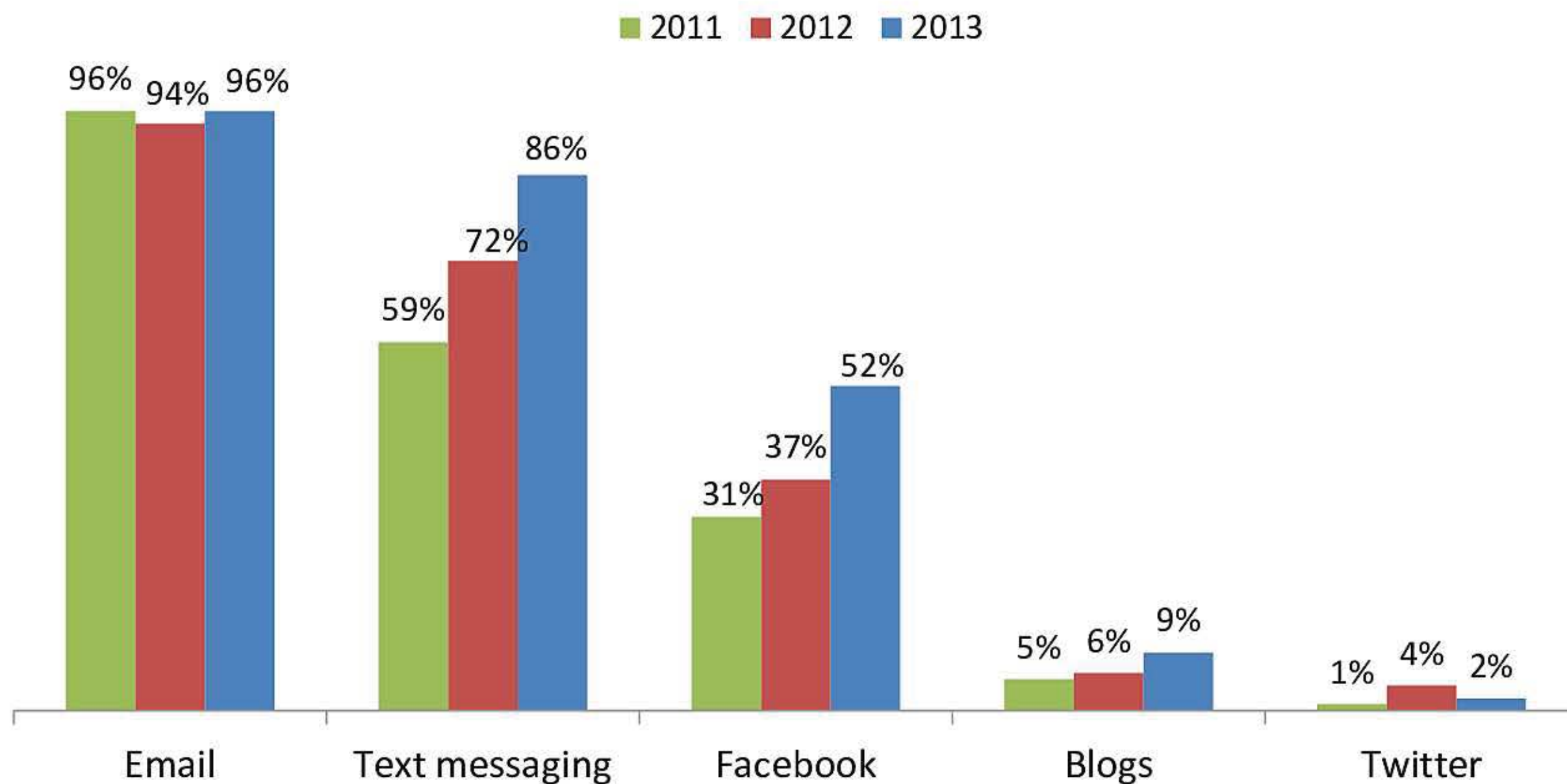
Note: % of those who communicate electronically with members and leaders

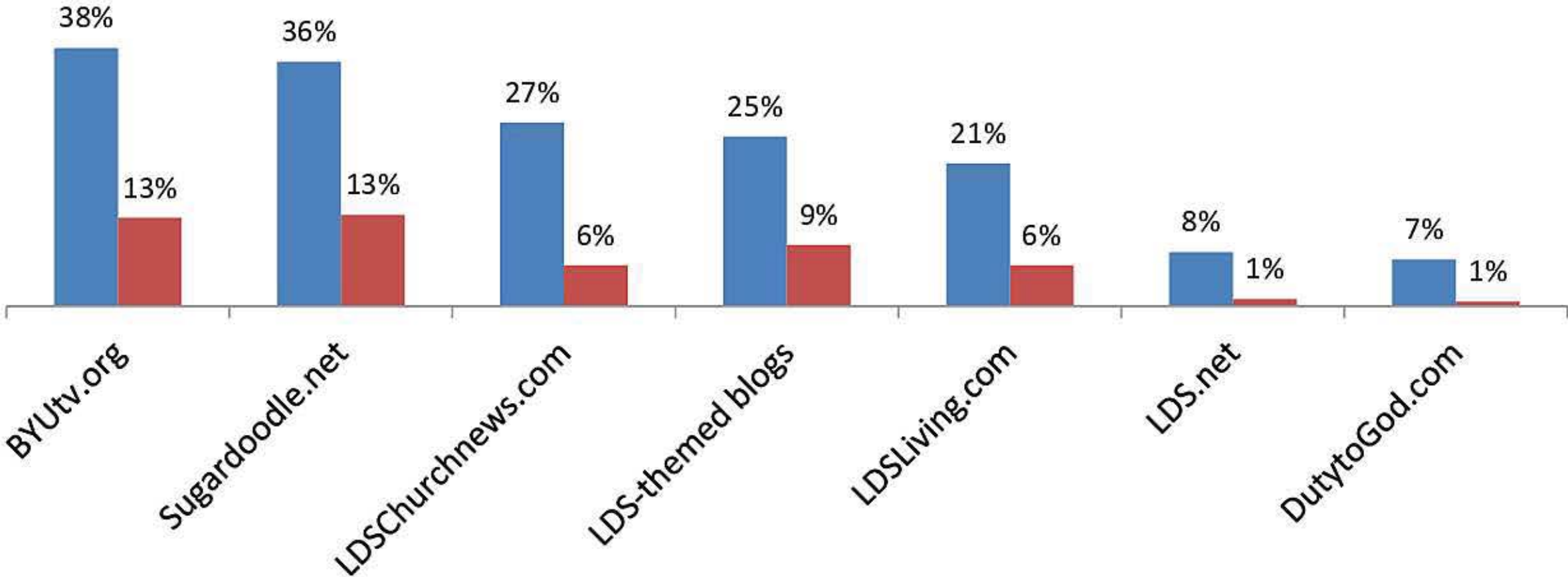# LDS Church Websites Visited (2013)

■ Ever visited   ■ Visit at least a few times a month

Website	Ever visited	Visit at least a few times a month
LDS.org	99%	81%
FamilySearch or...	68%	26%
Mormon.org	69%	19%
MormonChannel.org	60%	25%
ProvidentLiving.org	48%	6%
MormonNewsRoom.org	38%	10%
LDSFamilyServices.org	26%	3%

Other LDS Church related websites (2013)

- Ever Visited
- Visit at least a few times a month

Website	Ever Visited	Visit at least a few times a month
BYUtv.org	38%	13%
Sugardoodle.net	36%	13%
LDSChurchnews.com	27%	6%
LDS-themed blogs	25%	9%
LDSLiving.com	21%	6%
LDS.net	8%	1%
DutytoGod.com	7%	1%

LDS Church and other LDS related websites, 2013

(% that said very helpful)

Website	%
LDS.org	90%
FamilySearch.org	59%
Sugardoodle.net	55%
BYUtv.org	43%
MormonChannel.org	43%
LDSChurchnews.com	37%
Mormon.org	34%
ProvidentLiving.org	30%
MormonNewsRoom.org	30%
LDS-themed blogs	28%
DutytoGod.com	27%
LDSLiving.com	24%
LDS.net	22%
LDSFamilyServices.org	19%

■ LDS Websites
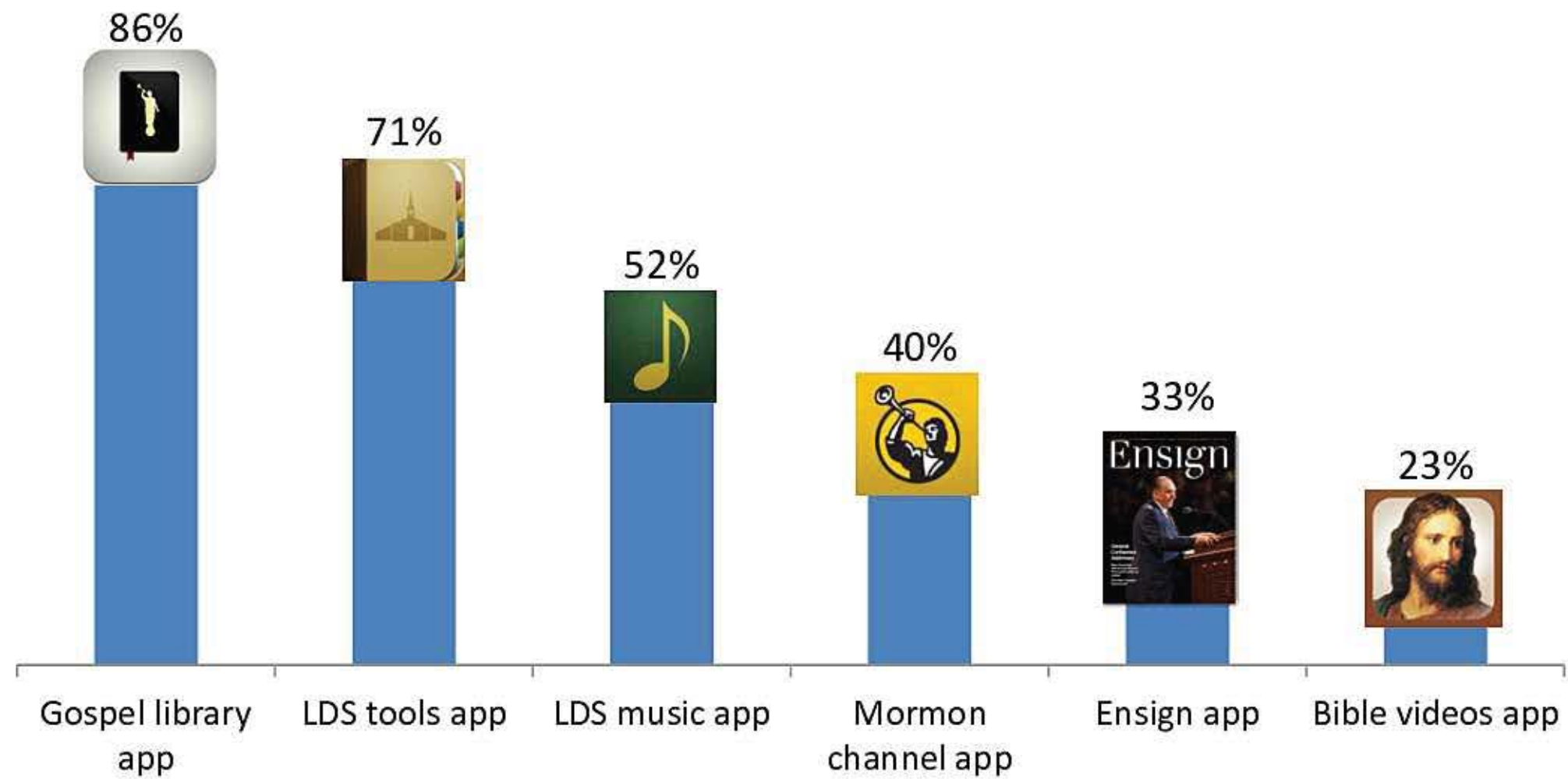
■ Other LDS related websites
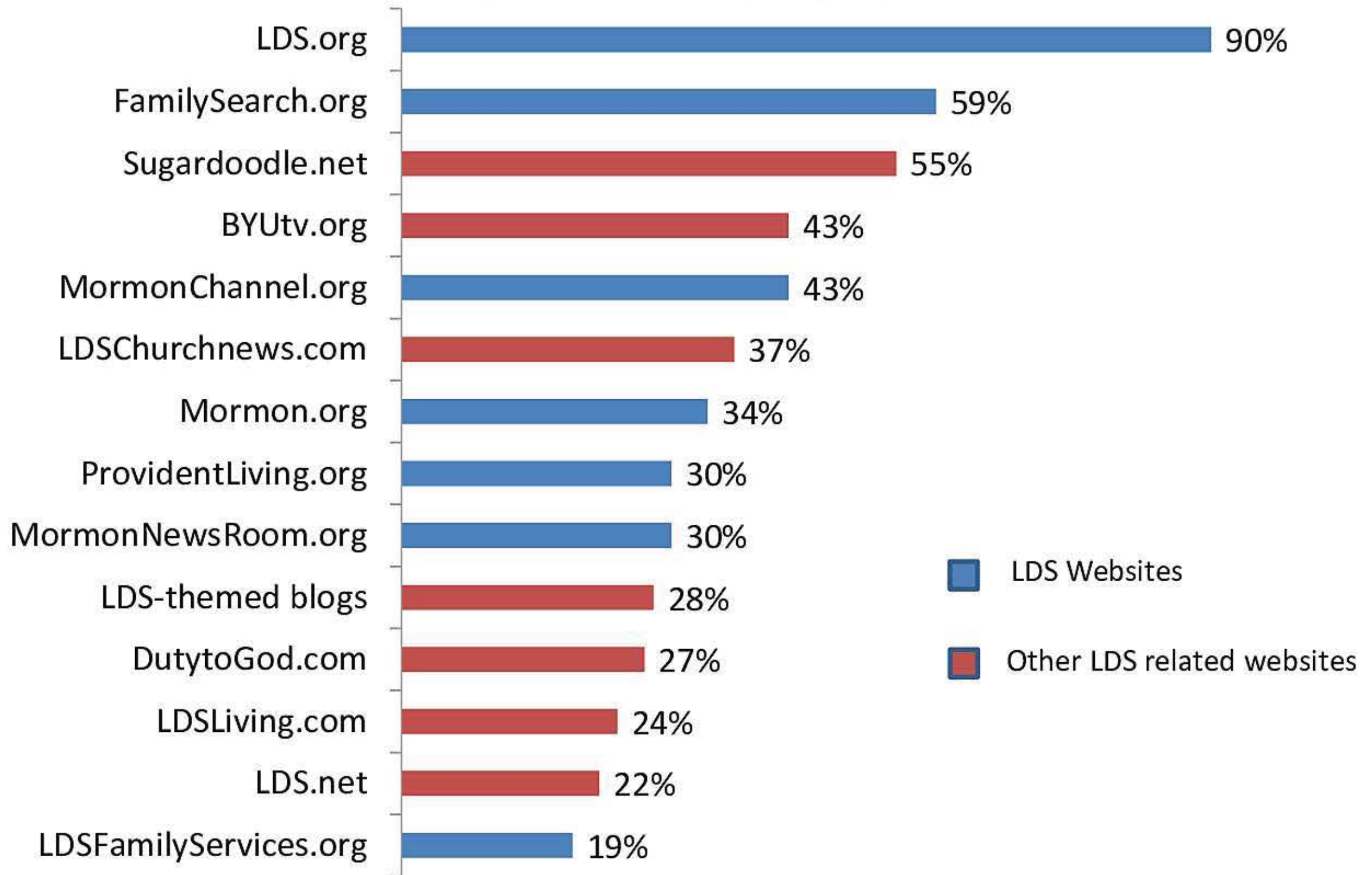
Note: % of those who have visited
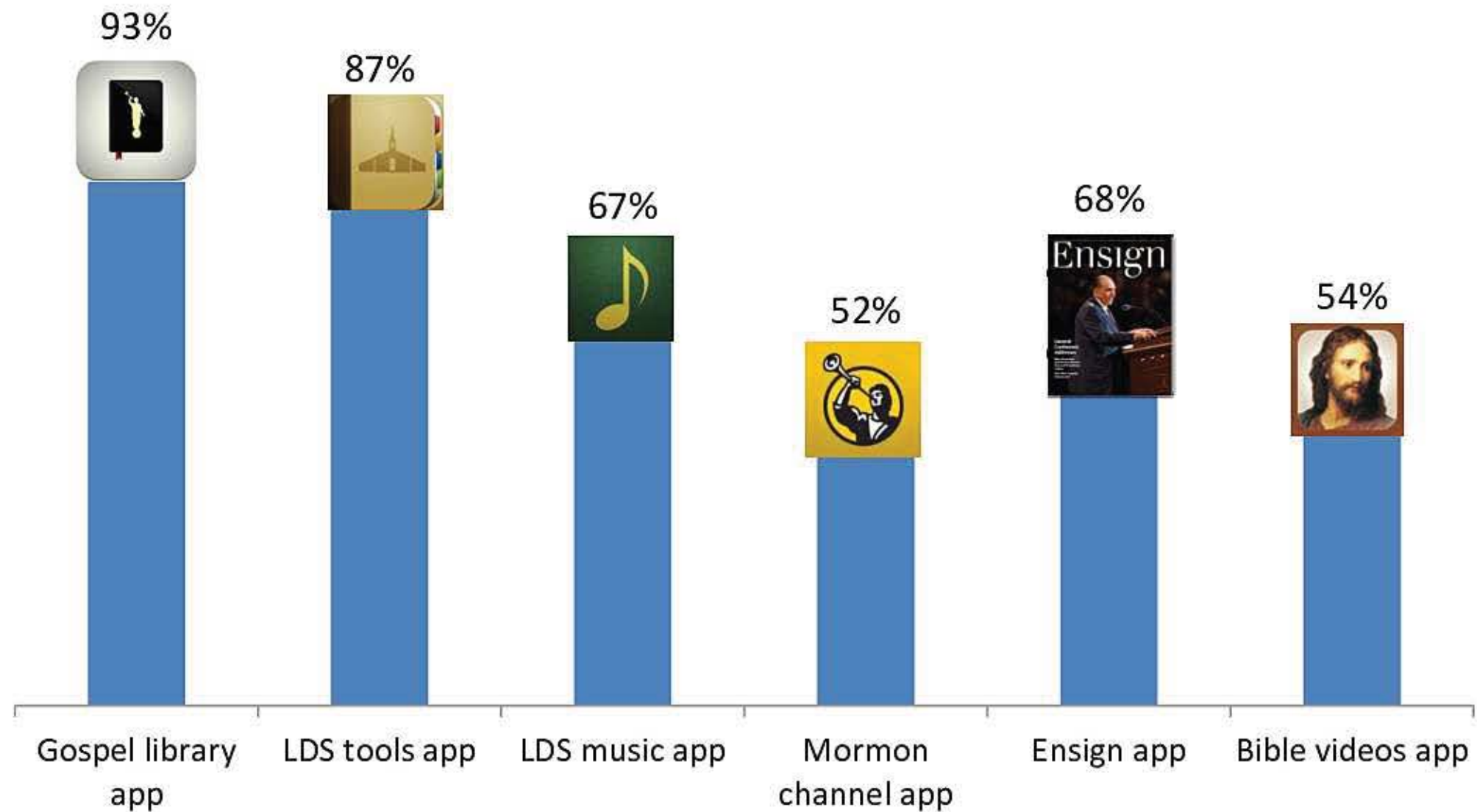
Downloading of LDS Church Applications (2013)
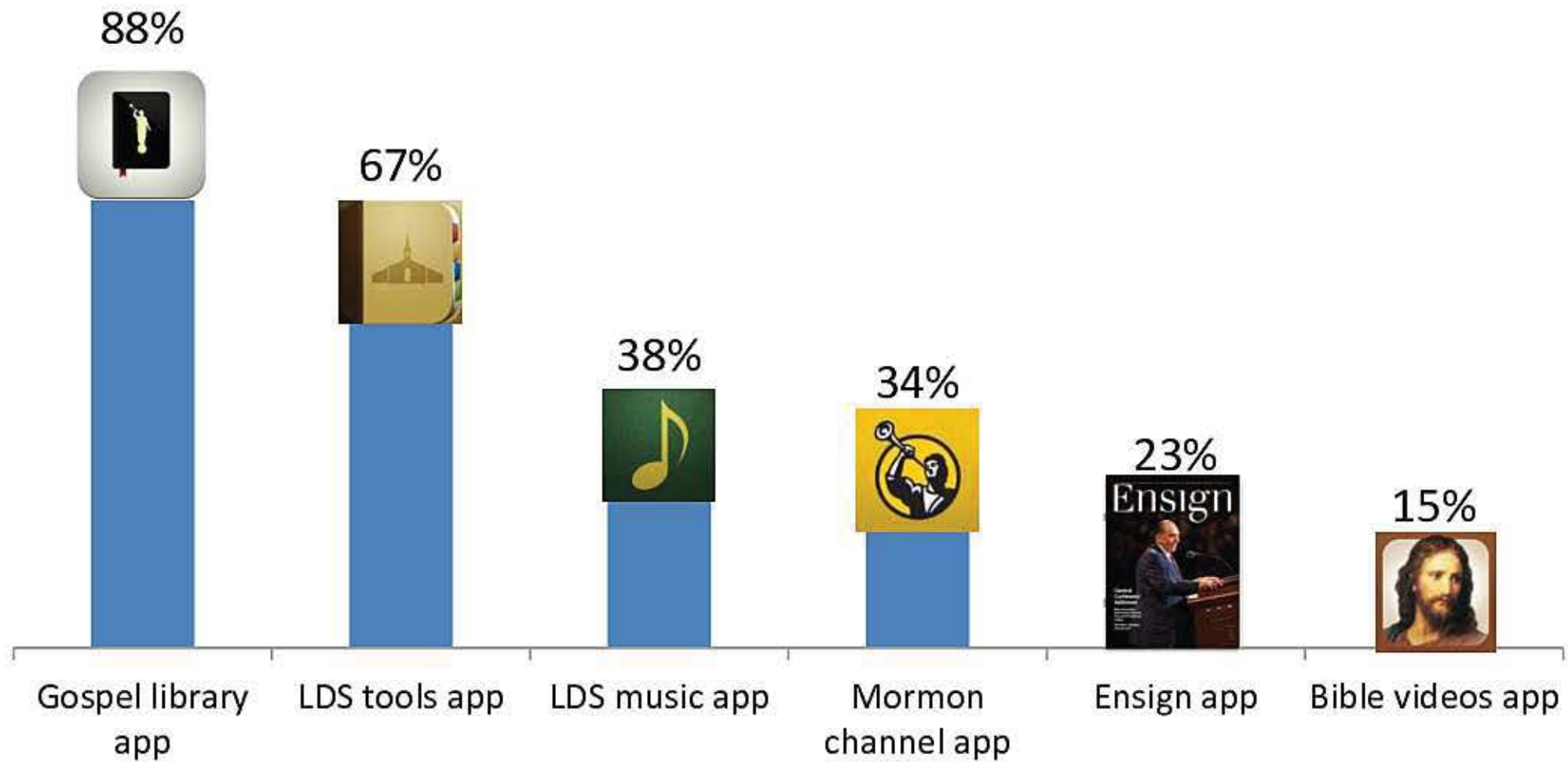
Note: % of those who have a smartphone, tablet, e-reader, iPod/MP3 player

Use of LDS Church Applications, 2013
(once a week or more)

86%

71%

52%

40%

33%

23%

Gospel library app   LDS tools app   LDS music app   Mormon channel app   Ensign app   Bible videos app

Note: % of those who have downloaded Church applications

Helpfulness of LDS Church Applications, 2013
(% that said very helpful)

93% — Gospel library app
87% — LDS tools app
67% — LDS music app
52% — Mormon channel app
68% — Ensign app
54% — Bible videos app

Note: % of those who use Church applications

How might LDS Church websites and applications be more helpful to you?

Open ended response categories	% of comments
Advertise: more information about existing Church websites and applications.	23%
Make websites and apps more user friendly with enhanced search capability and more intuitive navigation.	18%
More useful and relevant content.	17%
Fix the technical issues (compatibility when uploading and downloading).	16%
More education and training on using Church websites and applications.	10%