

[Infographic Summary](#)[Introduction](#)[Rival Devices](#)[Content Consumption](#)[Business Tool](#)[Location & Connection](#)[Purchasing & Satisfaction](#)[Continent Case Studies](#)[Africa](#)[Asia](#)[Australia / New Zealand](#)[Europe](#)[Middle East](#)[North America](#)[South America](#)[Conclusion](#)

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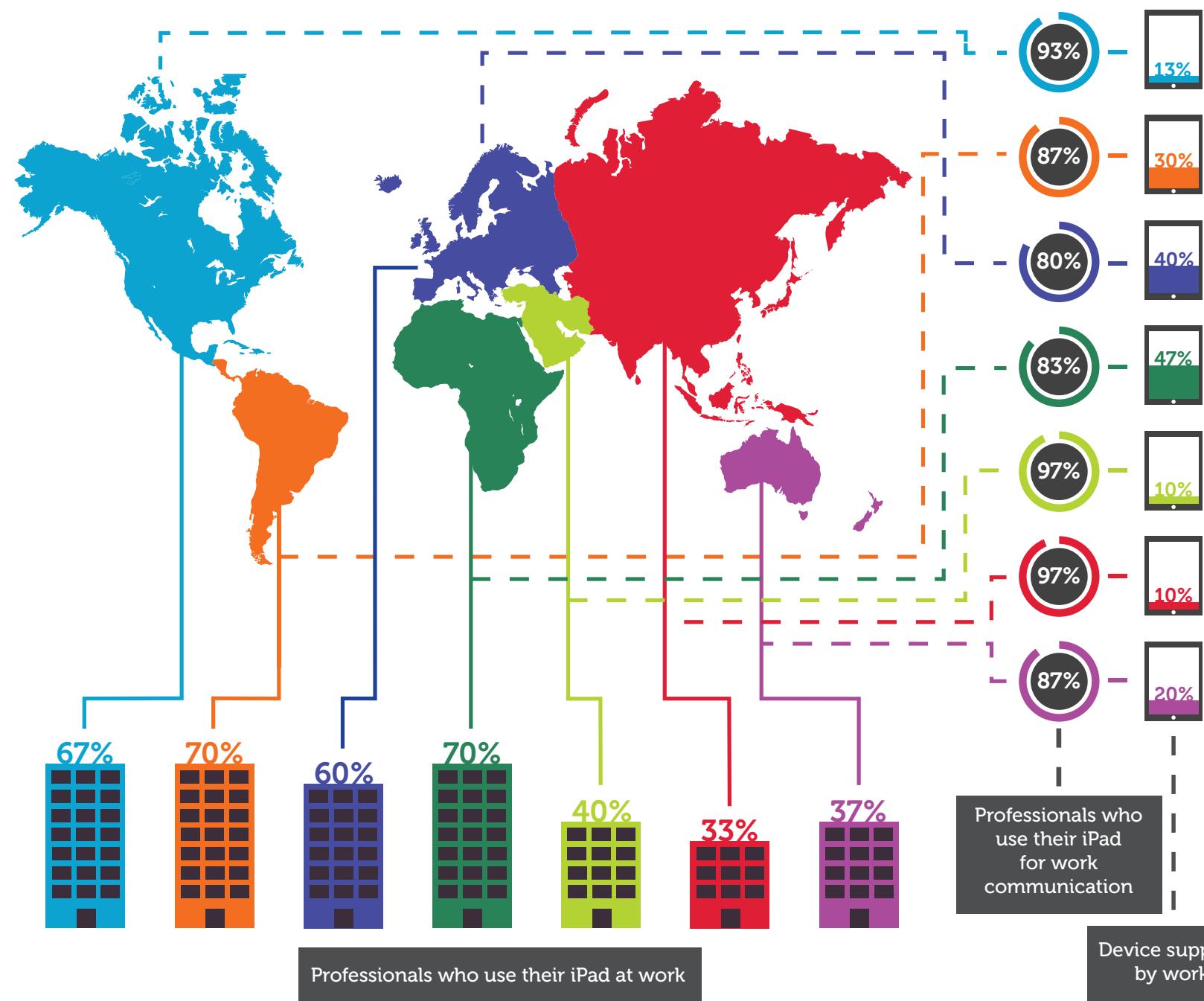
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iPad use at Work



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Introduction

Since its launch in January 2010, the iPad has become part of daily life for up to 60m users worldwide.^(1, 2)

Much has been written about the iPad as a "stay-at-home" device, used predominantly in the living room in a "lean-back" context. According to one recent survey of US consumers, 60% of iPads never leave the home, and 70% of usage occurs in the living room.⁽³⁾

As this global survey of iPad-using IT and business decision-makers suggests, these professionals differ from the broad population of consumers in this respect.⁽⁴⁾

IT and business professionals use their iPads more intensively, across a wider range of scenarios. Fully 51% of IT decision-makers say they "always" use their iPad at work (and a further 40% say they sometimes use it at work). Out-of-home usage is even more intense, with 79% of IT decision-makers saying that they "always" use their iPads "on the move".

By contrast, only 54% say they "always" use their iPad at home. But to what extent is this usage leisure-related? Only 31% say they "always" use their iPad for entertainment; only 42% say they use it for personal communication.

The picture that emerges from this survey involves IT and business professionals using their iPads as dual-purpose work/leisure devices, with a relatively strong emphasis on work functionality, and an extremely heavy emphasis on on the move usage.

Despite this, only 29% say that they "always" connect via mobile networks. This suggests that the iPad has become a tool for IT professionals to consume time-shifted content (previously sideloaded, or app-derived) while in transit between locations. Notably, three-quarters of respondents say they use their iPad for "reading".

Predictably, this survey confirms that iPads are better suited to consumption, rather than generation, of content. Around three-quarters use their iPads for news consumption and web browsing.

Only 54% "always" use iPads for work communication and 42% "always" use them for personal communication. Strikingly, only 44% "always" use their iPads for social media.

Like consumers, IT and business decision-makers are finding that the iPads can be viable replacements for laptops. Over 10% say that their iPad has "completely replaced" a laptop. Over half say it has "partly replaced" their laptop.

Our survey also suggests that tablet computing is transforming patterns of content consumption. iPad-owning IT and business professionals are rapidly migrating away from newspapers and printed books, toward digital alternatives. To a lesser extent, they are moving away from DVD-based audio-visual content towards wholly-digital alternatives.

This transition is taking place with striking speed. As tablet computing emerges into the mainstream, both media owners and marketers who produce content will need to consider the implications carefully.

(1) IDC, IDC's Worldwide Quarterly Media Tablet and eReader Tracker Makes Its Debut, Projects Nearly 17 Million Media Tablets Shipped Worldwide in 2010, 18th January 2011

<http://www.idc.com/about/viewpressrelease.jsp?containerId=prUS22660011>

(2) Charles Arthur, "Tablet sales will be equivalent to 15% of PC market in 2011, says IDC",

The Guardian, 15th September 2011

<http://www.guardian.co.uk/technology/2011/sep/15/ipad-tablet-market-2011-forecast>

(3) This survey is based upon telephone interviews with 210 respondents worldwide, conducted in October 2011 on behalf of IDG Connect.

(4) Bertil Chappius, McKinsey & Company, "Understanding the iConsumer: The Latest Data," Techonomy 2011, 12th-15th November 2011

http://www.livestream.com/techonomy/video?clipId=pla_06447ec5-2af6-49e0-81d8-4aa8fb41ee98&utm_source=lslibrary&utm_medium=ui-thumb

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The iPad as a replacement for rival devices

The iPad hasn't prompted the majority of IT and business professionals to abandon any other device. Only 12% say that their iPad has "completely" replaced their laptop. Just 6% say it has supplanted their PC.

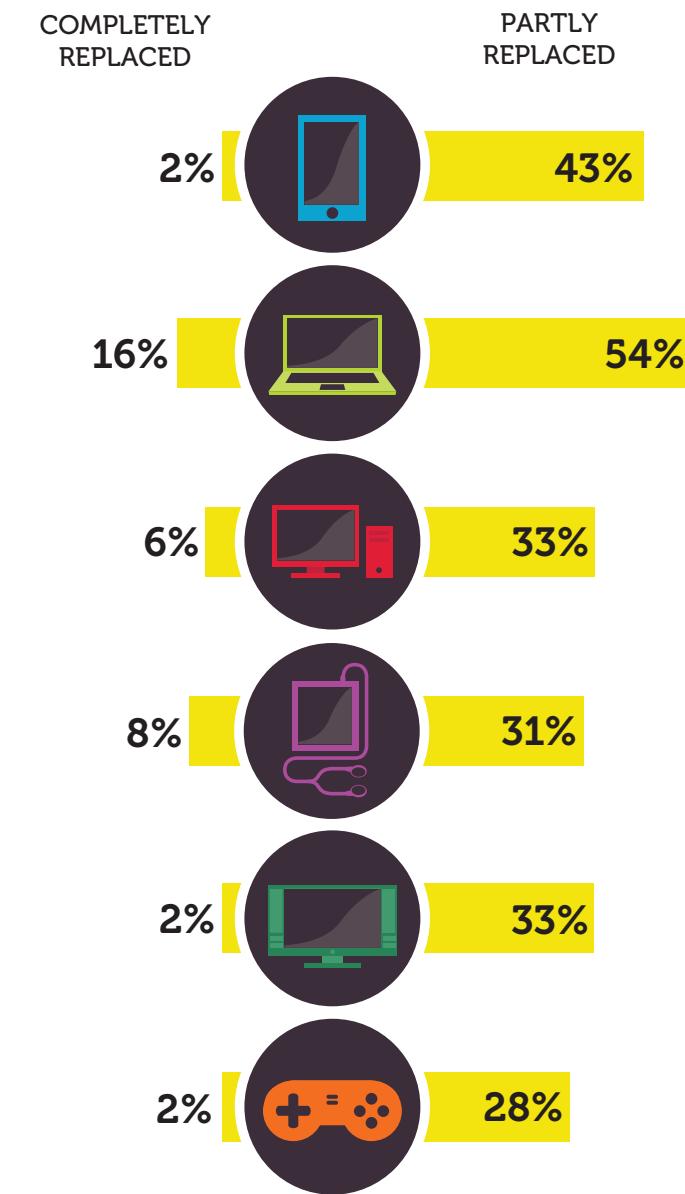
However, beneath these headline figures, evidence exists of much more aggressive switching between form factors in some regions. In South America, 27% of IT professionals have "completely replaced" their laptop with an iPad. In Europe, the figure is 23%.

If a majority of professionals still use laptops, the iPad has certainly curtailed usage levels. Nearly three-quarters of respondents say that they "carry their laptop around less" now that they own an iPad. Over half (54%) say that their iPad has "partly replaced" their laptop. IT professionals in the Middle East (70%) and Asia (63%) are a good deal more likely to say this than their peers in other regions.

For most, the iPad isn't a substitute for an existing tool or device. Instead, it's a supplement, albeit one with functionality that overlaps with other devices. As a result, the iPad seems to have carved out a niche for itself at the partial expense of several rival form factors. Relatively large numbers of respondents say that their iPad has "partly replaced" laptops, PCs, smartphones, MP3 players, TV/DVD recorders and even games consoles.

Interestingly, 43% describe the iPad as a part-substitute for their smartphone, with higher than average substitution levels occurring in South America (67%). Our working assumption is that the iPad – with its much larger screen size – has partially replaced smartphones as a platform for document reading, and to a lesser extent web browsing, while on the move.

Beyond keypad/keyboard devices, levels of partial substitution are lower. The proportion of professionals who describe their iPad as a "complete" or "partial" substitute for TV/DVD players, games consoles and MP3 players ranges between 30% and 40%.



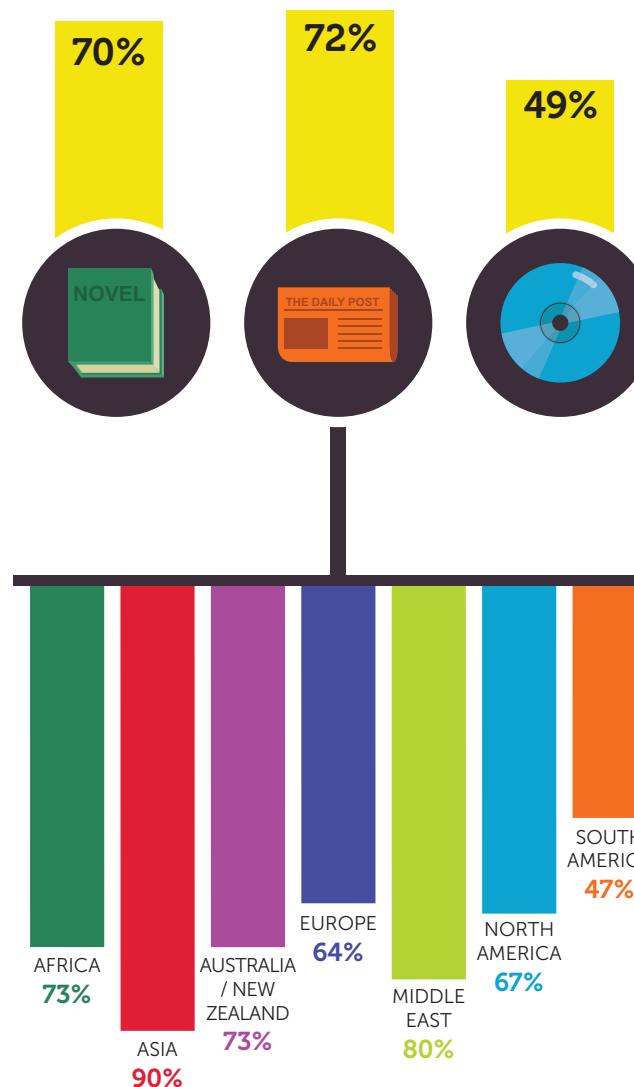
Number of professionals who say the iPad has partly or completely replaced the above devices

(Smartphone, Laptop, PC, MP3 Player, TV/DVD Player and Games Console)

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Professionals who now buy fewer physical books, newspapers and DVDs



Professionals who buy fewer newspapers

The iPad is driving radical changes in content consumption

Clearly, the iPad is disrupting the traditional market definitions of hardware manufacturers. Arguably, however, tablet computing poses even bigger challenges for media owners.

We asked respondents how iPad ownership had affected their propensity to buy newspapers, books and DVDs. Nearly three-quarters say that owning an iPad has reduced the frequency with which they purchase newspapers and books. Half say that owning an iPad means they are less likely to purchase films on DVD.

These markets for physical media are already in decline. On this evidence, tablet computing will hasten their demise. For advertising-funded media (newspapers and magazines), the challenges are particularly substantial. Readers who can afford iPads tend to be more demographically desirable than those who cannot. The danger for media owners is that migration to tablet consumption will "top-slice" their audiences, denying them the opportunity to monetize their most valuable readers via print advertising, which remains relatively lucrative.

Here, too, the regional variations are significant. IT and business professionals in Asia, Africa, the Middle East and South America are least likely to continue buying newspapers once they acquire an iPad. In the US and Europe, owning an iPad results in less of a negative effect on newspaper purchasing – perhaps because professionals in these regions have already shifted much of their reading from print to online media.

The pattern is similar for printed books and – to an extent – for DVD purchasing. iPad-owning IT professionals in Asia and the Middle East have an above-average propensity to stop buying printed books. The proportion of iPad-owning professionals who cease buying DVDs is highest in South America (67%), Asia (60%) and Europe (57%).

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The iPad as a business tool

The iPad was designed for consuming, rather than creating, media. But how do IT and business professionals use the device?

In general, IT and business professionals use their iPads most intensively for tasks that appear to be work-related. Web browsing, reading and news consumption are the top three usage contexts identified by professionals worldwide. In addition, more IT and business professionals "always" use their iPad for work communication (54%) than for personal communication (42%). With a few exceptions, including Australia (where browsing on iPads is less popular than average), and South America (where iPads are used slightly more intensively for personal communication than work communication), these patterns hold true across the board.

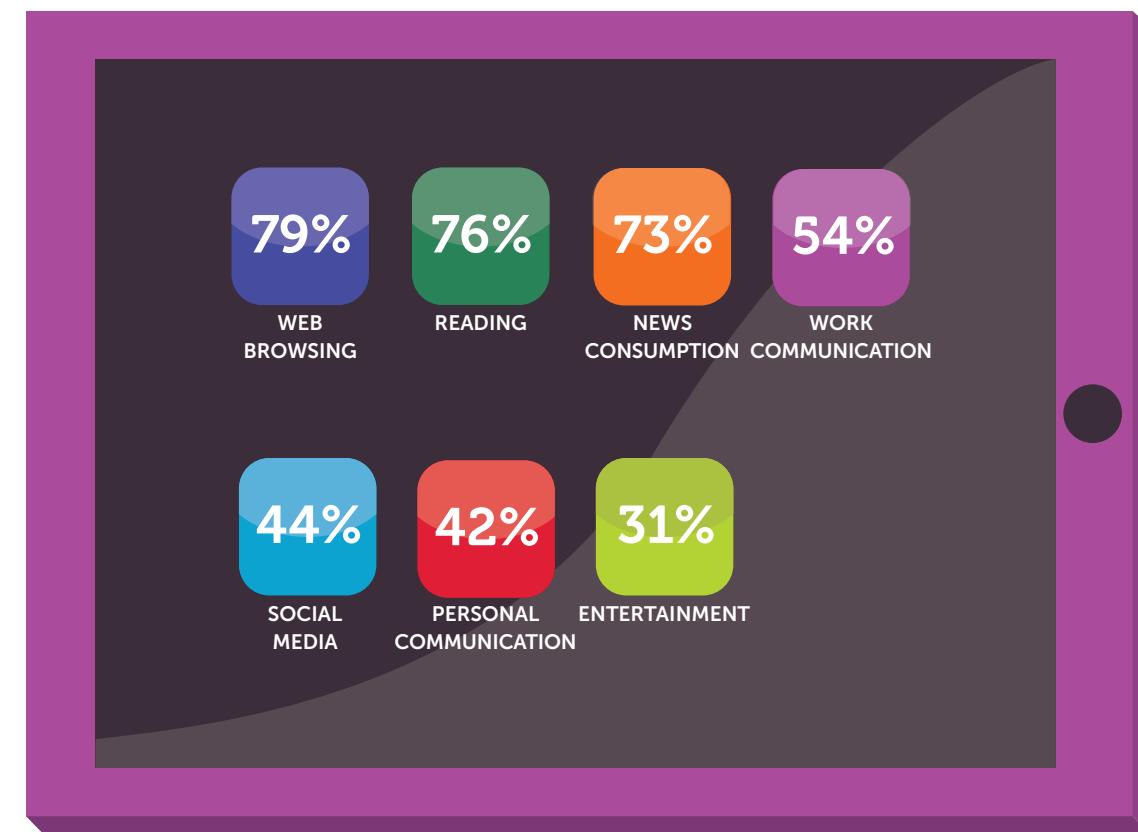
These findings suggest that a substantial number of professionals regard their iPad as a viable business tool.

It's also true that entertainment ranks low as a priority. Although 59% "sometimes" use their iPad for entertainment, only 31% do so regularly. But this doesn't mean that the iPad's leisure potential goes unnoticed. On the contrary, the evidence suggests that the iPad has emerged as a dual-use tool, albeit with the accent on work-based usage scenarios.

Usage patterns may sometimes be influenced by the identity of the purchaser. In Africa, for example, where 47% of iPads are purchased by an employer, levels of usage for work communication are far higher

than for personal communication.

In Europe, where a similarly high proportion of iPads – 40% -- are purchased by employers, the pattern is different. Only 33% of European IT professionals say they "always" use their iPad at work. More than twice that number – 63% -- say they "always" use it at home. Clearly, some of this home-based usage is unrelated to work. For example, an above-average number of European iPad users (37%) say that they "always" use their device for "entertainment". In this context, employer-funded iPads resemble a perk of the job, albeit one that possesses some work-related functionality.



Percentage of professionals who say they "always" use the iPad for the above tasks

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Use location & connection mode

When the iPad made its debut, many media commentators expected its primary use case to involve "lean-back" consumption. Whether this occurred in an arm chair, sofa or even in bed, the expectation was that home usage would be dominant.

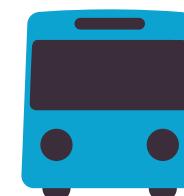
According to McKinsey, this remains the pattern for iPad usage among US consumers. (In November, McKinsey published the results of a survey of 15,000 US consumers, which suggested that 62% of iPads never leave the home, and that 70% of usage takes place in the living room).

Among IT and business professionals, however, usage appears to differ. Fully 79% of professionals say they "always" use their iPad on the road. The numbers who say they "always" use their device at home (54%) or at work (51%) is significantly lower. The numbers who "always" use their iPad "on the move" are highest in Asia (97%), Europe (90%) and Africa (80%).

Some, though by no means all, of the respondents who "always" use their iPad on the move say that they "always" connect to the web using mobile networks (29%). However, given the cost and unreliability of mobile connectivity, as well as the fact that it is unavailable on Wi-Fi only iPads, it's no surprise that so many respondents say they always or sometimes use their iPad in offline mode (59%). The high proportion of respondents who "sometimes" work offline may well be correlated with high levels of on the move usage.

The proportion of IT and business professionals who always or sometimes use their iPad offline is highest in North America and South America. Intriguingly, almost one-quarter of European users say they "always" use their iPad offline, presumably for viewing sideloaded or already downloaded content such as books, PDFs and films.

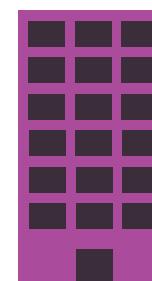
79%



How much do you use your iPad in the following locations?

ALWAYS ON THE MOVE

51%

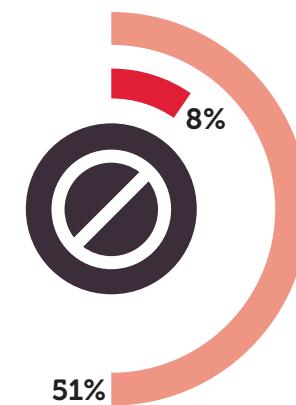
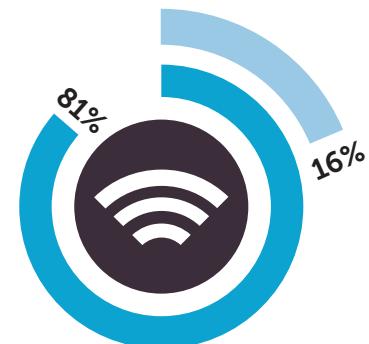


ALWAYS AT WORK

54%



ALWAYS AT HOME



Preferred connection mode

Inner circle - Always
Outer circle - Sometimes

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Purchasing, satisfaction & ownership

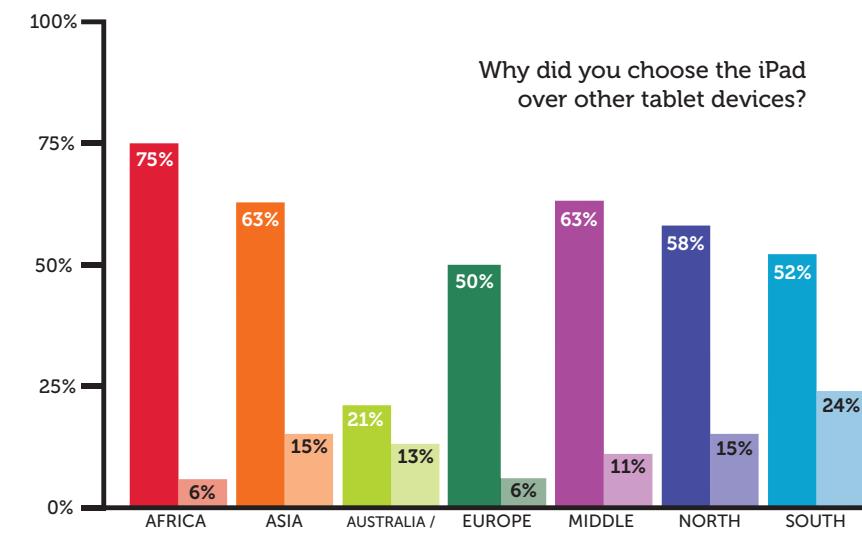
Purchasing

For the most part, the IT and business professionals we surveyed based their purchase decisions around positive assessments of the iPad's functionality. This suggests that prior to purchase, they tested or researched the device and found it good. In every territory except Australia, the percentage of respondents who purchased the iPad because they liked its functionality ranged between 50% and 75%.

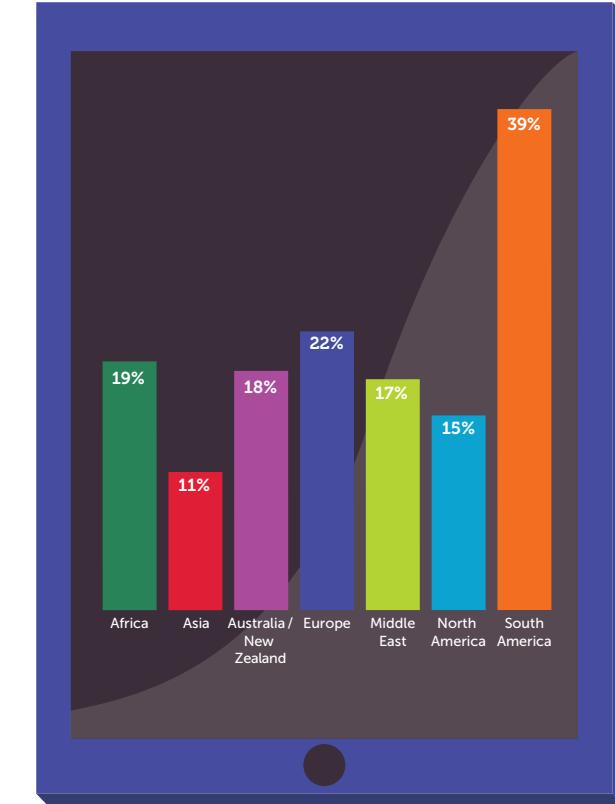
By contrast, the proportion of professionals who said they bought an iPad because they had "read or heard good things about it" was relatively small: just 13%, on average. IT and business professionals in South America relied relatively heavily upon good reactions from others. Yet even in South America, the proportion of professionals who formed their own opinion about the iPad's functionality was strikingly high.

Satisfaction

Measured by propensity to purchase a different tablet next time, IT and business professionals' satisfaction levels with the iPad are extremely high. Among professionals worldwide, only 17% say that they would consider buying a different tablet device next time.



Column 1 - Because they "read or heard good things"
 Column 2 - Because they "liked the functionality"



Professionals who would consider buying a different tablet device next time

Given the vast amount of positive reinforcement Apple has received from media coverage, and the dearth of established alternatives to the iPad, this isn't entirely surprising.

Loyalty to Apple is weakest in South America (where the tendency to buy on the basis of "having read or heard good things" was highest). With the exception of South America, Apple's least loyal iPad customers are in Europe, where 22% say they will consider an alternative next time.

Ownership

Three-quarters of respondents purchased their iPad privately. Only one-quarter were supplied with an iPad by their employer. The regional variations are significant. Levels of private ownership are highest in Asia and the Middle East (90%) and North America (87%). In Europe and Africa, employers are much more likely to purchase iPads on behalf of IT professionals.

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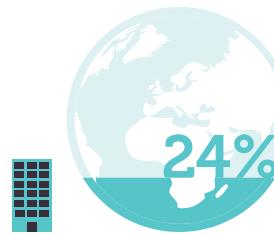
Africa

IT and business professionals in Africa are twice as likely to use an iPad purchased by their employer than their colleagues elsewhere in the world.

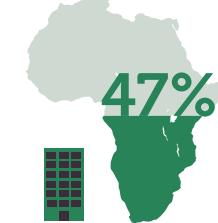
Perhaps as a result, African professionals use their iPad for entertainment and personal communication less frequently than the norm. At 13%, the proportion who say they use their iPad for "entertainment" is the lowest in the world. Levels of iPad-based work communication are higher than average.

Levels of hardware substitution are very close to the global norm. When asked whether owning an iPad has led them to buy fewer newspapers or books, African respondents respond in ways that are similarly close to global norms.

African professionals use the iPad's Wi-Fi connectivity to an extent that's similar to elsewhere. However, African respondents connect to the internet using mobile networks far more frequently. Given the role that mobile connectivity plays on the continent, this shouldn't come as a surprise.



WORLDWIDE



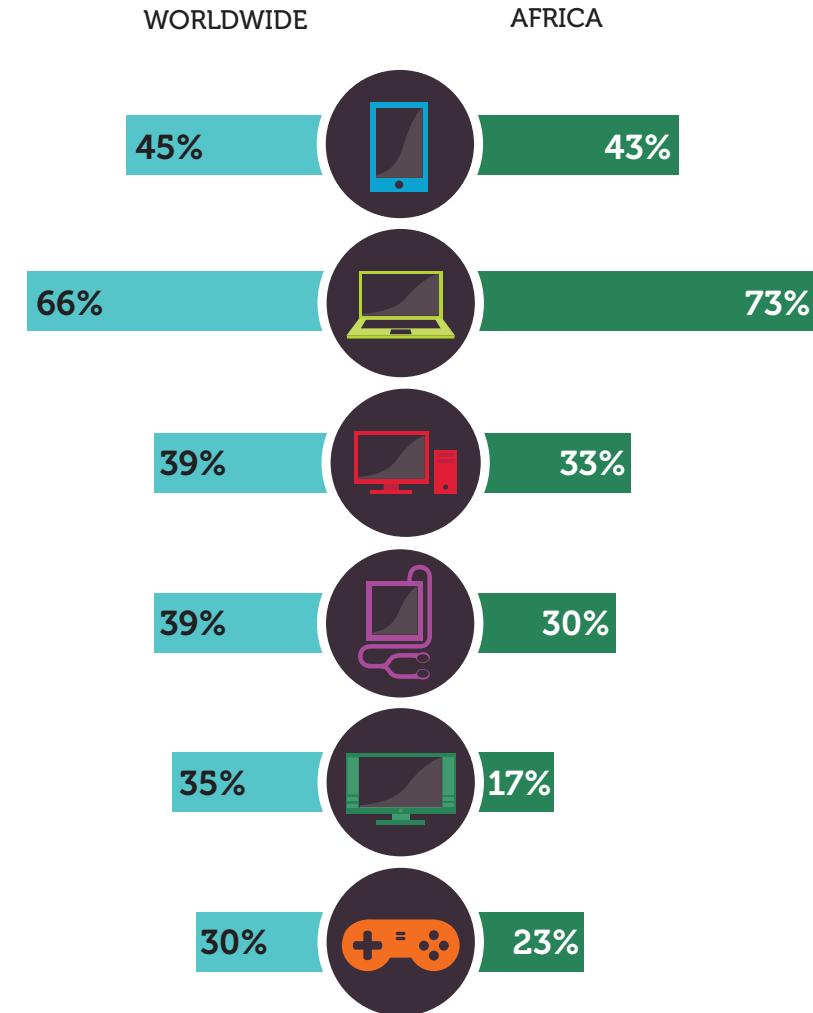
AFRICA

"Yes, my iPad is supplied by my employer"

"I always or sometimes connect my iPad via mobile networks"

Inner circle - sometimes
Outer circle - always

"My iPad has completely or partly replaced the following..."



Would you consider buying a different tablet next time?

11% said yes

"I like the iPad. I think I will stick with it, but it does have a limited functionality."

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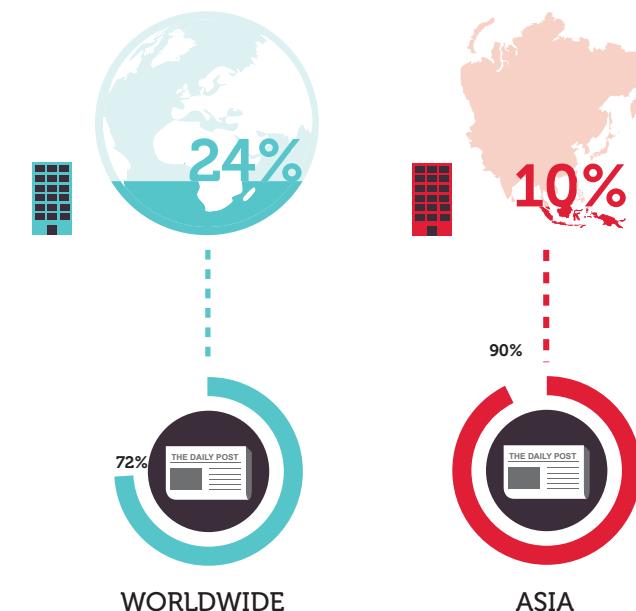
Asia

Asian IT and business professionals are highly likely to fund their own iPad purchases – and then use their device as a work tool. Social media usage on iPads is very high, while usage for personal and work communication (primarily email) is relatively low.

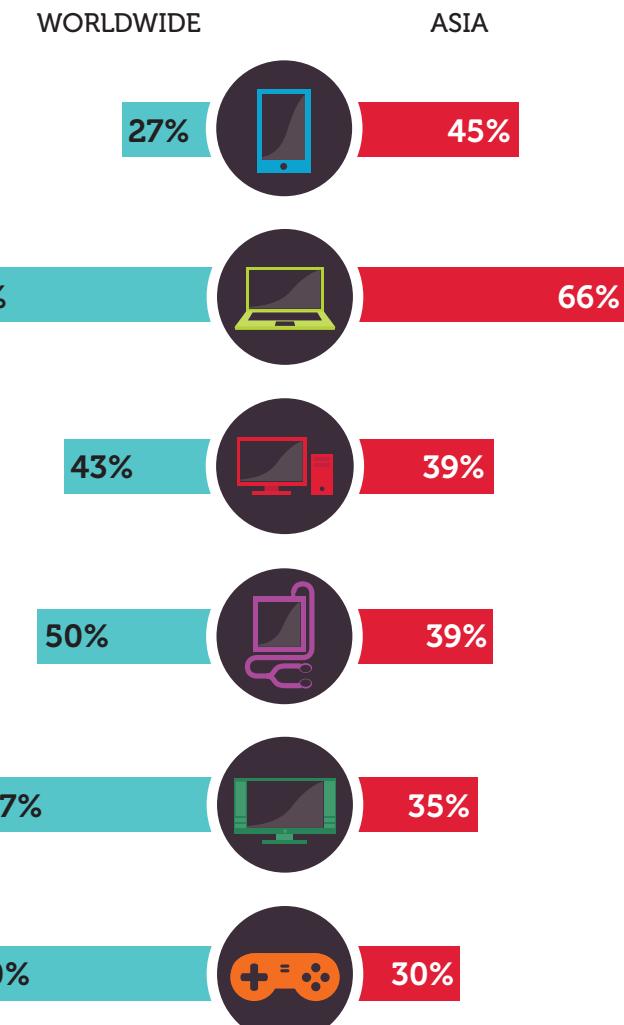
Asian professionals are more likely than the global norm to say that their iPad has "completely" or "partly" replaced a laptop or PC. But when it comes to smartphones, levels of substitution are lower in Asia than elsewhere.

Hardware substitution becomes much more visible in leisure applications. Very high numbers of Asian professionals say that their iPad has become a partial or complete substitute for MP3 players (50%), TV or DVD player (67%) and games consoles (70%).

Asian professionals are fully engaged by the iPad's powerful effects on content consumption patterns. Nine out of ten Asian professionals say they have purchased fewer newspapers and books since taking delivery of an iPad.



"My iPad has completely or partly replaced the following..."



Would you consider buying a different tablet next time?

"I'd like to see what else is out there."
"I don't use the iPad often. I prefer to use my iPhone and MacBook. So at the moment, I'm not interested in replacing the iPad."

11% said yes

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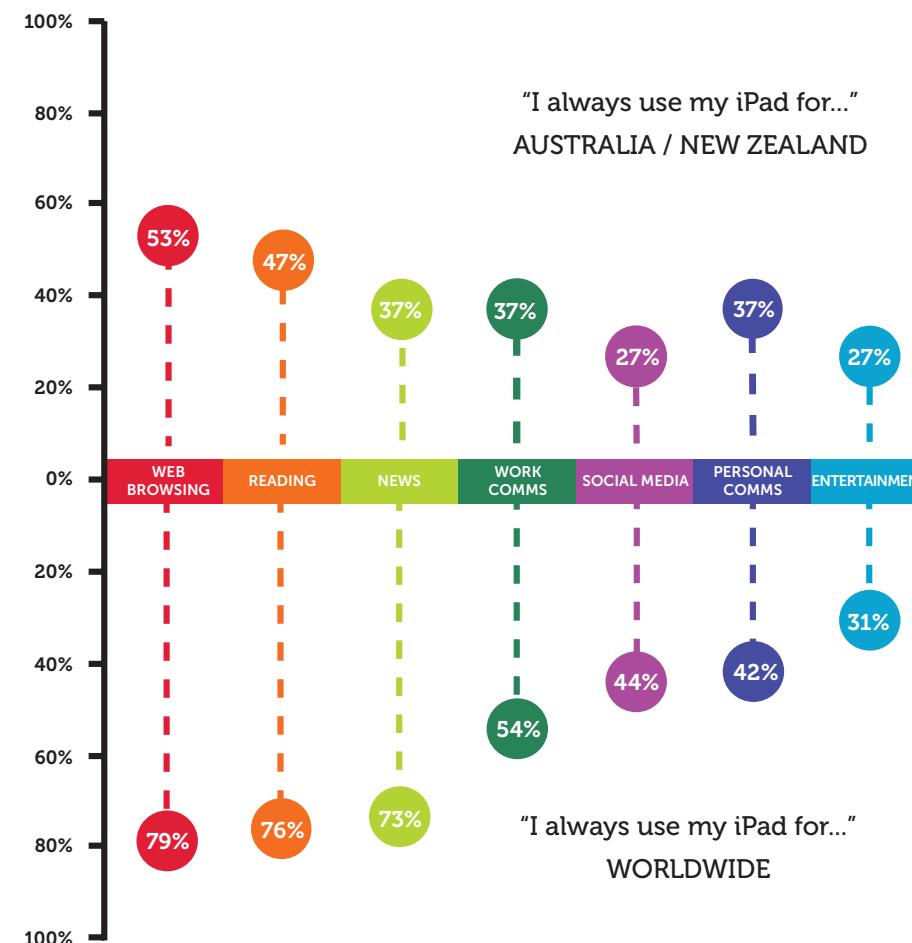
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Australia / New Zealand

In many ways, IT and business professionals in Australia and New Zealand use their iPads conservatively.

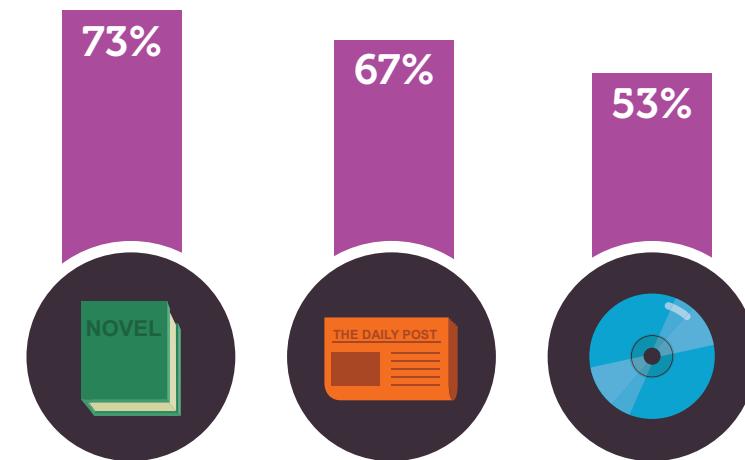
Only 40% see their iPad as a complete or partial replacement for a laptop (compared with 64% worldwide). Professionals in Australia and New Zealand are also far less interested in using iPads as substitutes for PCs. Levels of usage on the move are the lowest in the world.

Low levels of hardware substitution correlate with less intensive use of iPad functionality than in other regions. Worldwide, 73% say they "always" use their iPad for web browsing – the most popular application of all. In Australia and New Zealand, only half of IT and



business professionals "always" browse the web on their iPads.

In this context, it's striking that iPad-owning professionals in Australia and New Zealand feel the impulse to buy fewer newspapers, books and DVDs as strongly as their peers in other regions. Even among light iPad users, it seems, the pressure to change consumption patterns is substantial.



Impact on media consumption: "I buy fewer books, newspapers and DVDs"

"I would like to see what other tablets have to offer. I like the iPad but have found no app outstanding."

"If it was better, e.g. played Flash or had a USB port."

Would you consider buying a different tablet next time?

18% said yes

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Europe

IT and business professionals in Europe are highly likely to possess an iPad paid for by their employer. This is the case for 40% of respondents – the second highest proportion in our survey after Africa (47%)

In Europe, substitution for smartphones and PCs is broadly on a par with the global average. However, relatively high numbers – nearly one-quarter – say that their iPad has “completely replaced” their laptop.

When asked whether owning an iPad resulted in buying fewer newspapers or books, European professionals are less likely than average to respond affirmatively. Either they remain stubbornly committed to print, or (more likely) they made the shift to increased digital consumption prior to acquiring an iPad.

European users have a marked tendency to use their iPads offline. They are more likely than average to connect with the web via mobile networks. Predictably, levels of “on the move” use are extremely high.

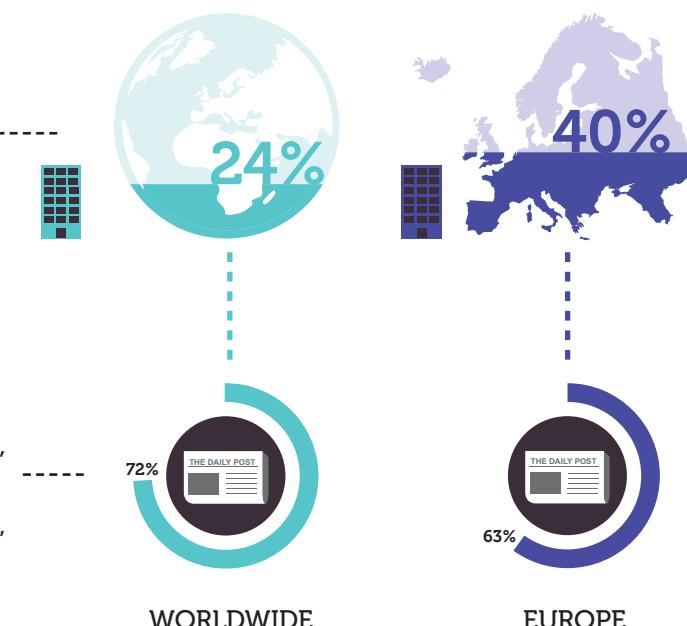
European IT and business professionals are more likely to “always” use their iPad at home (63%) than at work (33%). Taken in connection with other findings, this suggests higher than average levels of personal use. Notably, a higher than average proportion of European respondents say that owning an iPad has resulted in fewer purchases of DVD-based video content.

Would you consider buying a different tablet next time?

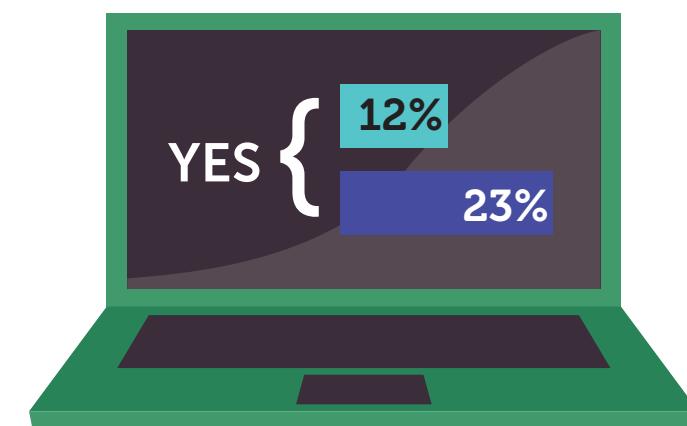
22% said yes

“The iPad doesn’t support Flash and iTunes isn’t sufficiently flexible. If something better comes along, I would buy it.”

“Yes, my iPad is supplied by my employer”



Has your iPad completely replaced your laptop?



● - WORLDWIDE

● - EUROPE

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Middle East

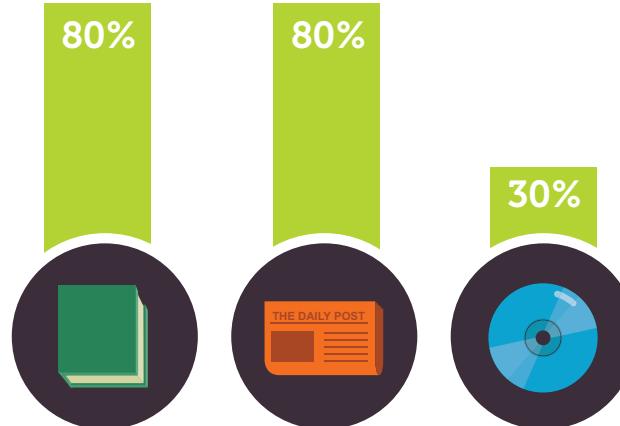
Only 10% of Middle Eastern IT and business professionals say that their employer purchased an iPad on their behalf.

Levels of substitution for other form factors are broadly in line with the global average. However, respondents in the Middle East have an outsized tendency to use their iPad to replace TV and DVD player functionality. Professionals in the Middle East are relatively loyal to their laptops: only 60% say that they carry it around less since they have owned an iPad.

Mirroring this, the number who say they "always" use their iPad "on the move" is less than the global average (as is frequency of connection via mobile networks).

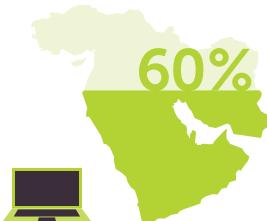
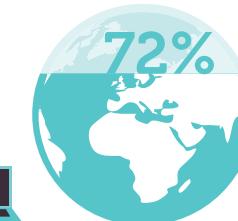
IT professionals in the Middle East are among the least likely to "always" use their iPad for web browsing (only 64% say they do so). Levels of usage for personal and work communication are also below the global average.

Despite this, 80% say they now buy fewer newspapers and books. Notably, however, Middle Eastern IT and business professionals exhibit above-average loyalty to DVD-formatted content.

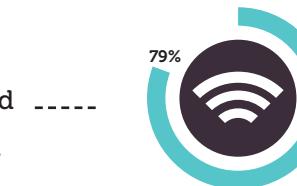


Impact on media consumption: "I buy fewer books, newspapers and DVDs"

"Now that I own an iPad, I carry my laptop around less"

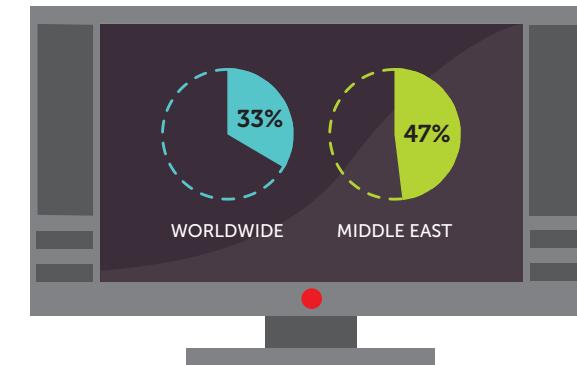


"I always use my iPad for web browsing"



WORLDWIDE

MIDDLE EAST



"Yes, my iPad has partly replaced my TV and DVD player"

"There are lots of options out there. In particular, I dislike the web browser on the iPad."



Would you consider buying a different tablet next time?

IDG Connect is the demand generation division of International Data Group (IDG), the world's largest technology media company. Established in 2005, it utilises access to 35 million business decision makers' details to unite technology marketers with relevant targets from any country in the world. Committed to engaging a disparate global IT audience with truly localised messaging, IDG Connect also publishes market specific thought leadership papers on behalf of its clients, and produces research for B2B marketers worldwide.

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North America

Among North American respondents, the number whose employers provide them with an iPad is low (just 13%).

A broadly average number of North American respondents (57% versus 54% for all respondents) told us that their iPad had become a partial substitute for their laptop. However, the number of North American IT and business professionals who say they have "carried their laptop around less" since acquiring an iPad is the lowest in all of regions we studied.

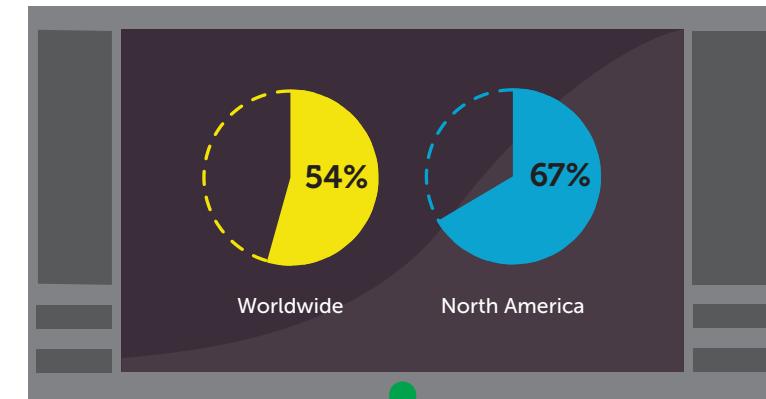
The findings suggest that North Americans use their iPads slightly more intensively than the global norm, with a strong emphasis on web-based functionality. A relatively high proportion of professionals in North America say that they "always" use their iPad for web browsing (87%), work communication (67%) and personal communication (63%). Fewer North American respondents find themselves using their iPad as a substitute for TV and DVD players than in other regions.

The iPad is forcing changes in content consumption patterns in North America. However, the number of North Americans who say that owning an iPad has led them to buy fewer newspapers and books is lower than the global average. In this respect, North Americans resemble Europeans: either they remain stubbornly committed to print, or (more likely) they made the shift to increased digital consumption prior to acquiring an iPad.

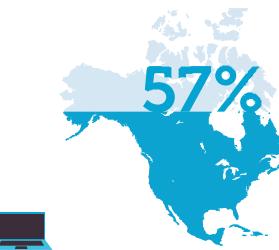
Would you consider buying a different tablet next time?

"I am interested in Android."
 "Kindle is a good alternative to Apple for my needs and interests."

15%
 said
 yes



"My iPad has not at all replaced my TV and DVD player"



"Now that I own an iPad, I carry my laptop around less"



WORLDWIDE



NORTH AMERICA

"I always use my iPad for personal communication"

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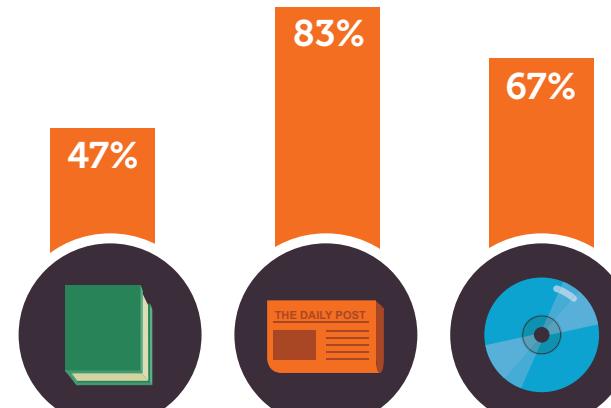
South America

The iPad emerges as an extremely strong substitute for smartphones, laptops and PCs in South America.

More IT and business professionals in South America report that their iPad has partly replaced their smartphone than in any other region. The extent to which South American professionals are using iPads to completely replace laptops and PCs is also very high.

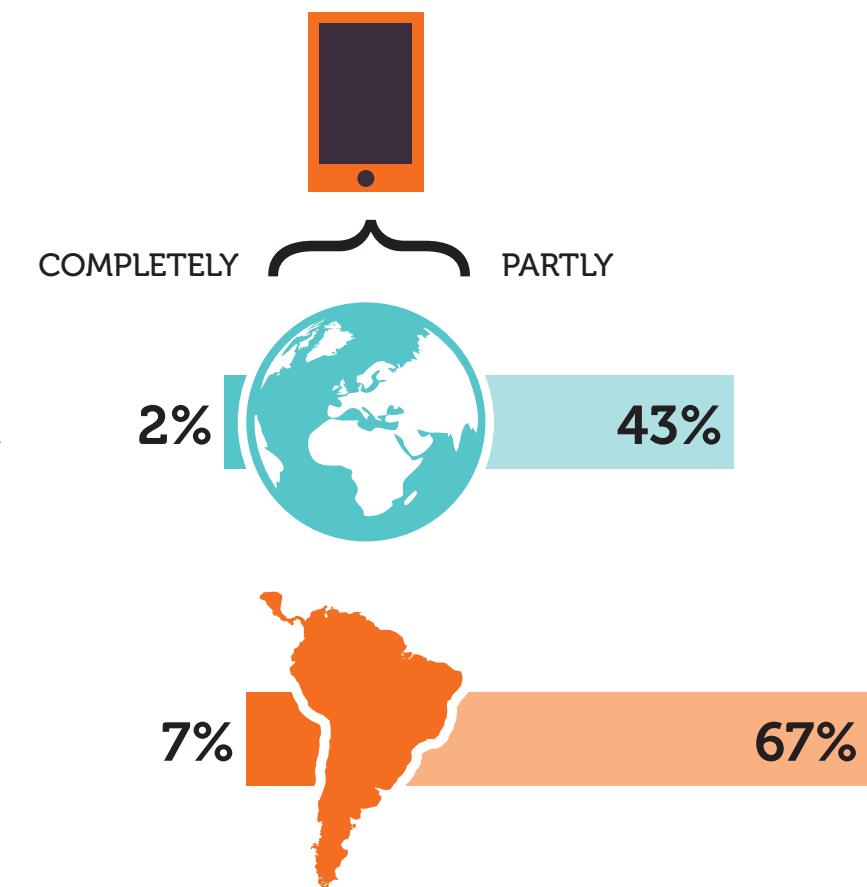
This correlates with intensive patterns of usage, both at work and at home. Twice as many South American respondents use their iPad for entertainment than the global average. Two-thirds of respondents say they "always" use their iPad for social media – significantly more than the global average. Large numbers also report using the iPad for personal and work communication.

The correlation between intensive use and high levels of substitution for laptops and PCs suggests that tablet computing may become an even more profound threat to traditional hardware manufacturers. If intense usage increases substitution, the key priority for Apple must be to encourage developers to build easy-to-use software dedicated to tasks (like email) which traditional PCs, laptops and smartphones currently perform better.



Impact on media consumption: "I buy fewer books, newspapers and DVDs"

To what extent has your iPad completely or partly replaced your smartphone?



Would you consider buying a different tablet next time?

39% said yes

"I live in Sao Paulo - a dangerous city. I would prefer a smaller device."
 "I'm a bit dissatisfied with the iPad. I am looking at alternatives."

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Conclusion

When the iPad made its debut, it was routinely described as a media consumption device. Subsequent research has suggested that a majority of iPads never leave the home and that most are used in the living room.

However, the survey findings contained in this white paper suggest that business professionals use tablet computers very differently.

IT and business professionals certainly use their iPads at home. But unlike most consumers, they also use their devices in a similarly intensive way at work. In a further, decisive, break with consumer usage patterns, IT and business professionals use their devices on the road far more frequently than anywhere else.

In one respect, IT and business professionals do resemble consumers: they mostly use their iPads for media consumption.

What this survey makes clear is that iPad-based media consumption among IT and business professionals is predominantly text-based and work-related. In particular, web browsing, news consumption and reading emerge as the three most intensive usage scenarios, the killer apps that transform the iPad into a viable business tool.

When we start to think about these usage scenarios in the context of location, connectivity becomes an issue.

IT and business professionals most frequently use their iPads on the road: in planes, trains and automobiles; in hotel lobbies, coffee shops, conference halls and meeting rooms. Yet only 40% of iPads sold to consumers incorporate 3G connectivity as well as Wi-Fi.⁽⁵⁾ Mobile connectivity is frequently flaky; and for the 60% who own Wi-Fi only iPads, connections aren't always available. Hence, perhaps, the striking finding that while 79% of IT professionals "always" use their iPads on the move, 59% "always" or "sometimes" use their device in offline mode.

In offline mode, users cannot surf the web. Using the right kind of RSS reader, they can consume news offline, although the flow of stories doesn't update without connectivity. When connectivity is

flaky or non-existent, therefore, this leaves unhindered just one of the three leading media consumption modes: the reading of previously sideloaded or downloaded documents.

What kind of documents do IT and business professionals read on their iPads? Any list would need to include Excel, Word and Powerpoint files sent to them for review by colleagues. Equally, however, it seems likely that many are using their iPads as a filing system for "must-read" PDF-based reports, including vendor white papers.

In general, work-related content consumption is sufficiently high that it's easy to envisage a lot of this kind of reading also taking place, after hours, at home.

In this respect, the iPad may open up significant possibilities for technology marketers. The prospect of gaining access to decision-makers who are in reading (or lean-back) mode while at home or on the move between locations, is intriguing. At the very least, it deserves further investigation.

(5) Josh Lowensohn, "eBay reveals its iPad 2 sales data," CNET, 31st March 2011

http://news.cnet.com/8301-13579_3-20049011-37.html