

iPad Browsing Experience

PR Poll Findings
September 20, 2012



Key Findings | Overall Impressions & Scenarios

On the surface, satisfaction with the iPad and browsing on the iPad is high – users don't necessarily see a problem and are not aware of the possibility of better solutions. But when we look deeper, specific weaknesses emerge.

Web browsing is among users' top favorite iPad activities.

- 50% include web browsing among their top 3 favorite activities to do on the iPad, and nearly all see it as an important part of their overall iPad experience and are satisfied with it.
- Playing games and social networking are also popular iPad activities, while least favorite activities include managing personal finances and IM/texting, educational activities and chat.
 - 5% say web browsing is their least favorite activity on the iPad.

Negative scenarios are common and have the potential to turn users away from web browsing on the iPad.

- Over 8/10 have experienced a negative scenario with their iPad.
 - They point to site/applications not working right or slow, buttons or controls hard to navigate via touch and/or difficulty typing.
- Most users find these scenarios frustrating and want to seek better alternatives.
 - Sites not responding or shutting down and inability to complete an online transaction are the most frustrating experiences.
 - Inability to complete an online transaction or to access work applications drive users to seek out better alternatives the most.

Key Findings | Comparisons to apps and computer browser

Users find some activities easier to do in the iPad browser, but turn to apps for others.

- They choose to use the iPad browser for shopping related activities, entertainment planning, and accessing work applications, but they prefer apps for checking weather, updating and browsing Facebook or Twitter, and playing multiplayer games.
- 1 in 10 say they find it difficult to watch videos (6/10 would prefer to use an equally capable app), play multiplayer online games (a third would prefer an app) and access work applications on their iPad (over 4/10 would prefer an app).
 - They blame the absence of Flash for their difficulty watching videos and playing multiplayer online games; menus and options not appearing correctly hamper online transaction; and applications and sites not working are seen as causing difficulty accessing work applications.

Over half say their browsing experience on the iPad is more limited compared to web browsing on their computer.

- Users find it easier to do most activities on their computer over the iPad.
 - They especially choose the browser on their computer for activities that involve doing or creating something (e.g. online shopping and banking, use of work applications) and watching videos.
 - But the iPad browser is more convenient for consumption activities (e.g. checking weather and Facebook/Twitter news feed).

Satisfaction with Chrome and Safari on the iPad is high, though some see speed as an issue.

- The majority are satisfied with the experience using Chrome or Safari on the iPad and nearly half are very satisfied with it.
- While most don't see much difference in speed or overall experience for either browser, a quarter of Chrome users say Chrome runs slower on their iPad than on their computer (slightly fewer say the same about Safari).

Key Findings | Thoughts on iPad browsing






Overall satisfaction with iPad browsing remains very high at the end of the survey, but users feel less strongly and are open to switching.

- iPad users continue to see browsing as a very important and satisfying part of their overall iPad experience.
- However, fewer consider browsing as a “very” important part of their overall iPad experience and fewer are “very” satisfied with iPad browsing.
- Despite high overall satisfaction, three-quarters of Windows 7 users and two-thirds of Mac users are open to switching if a tablet with a better browsing experience became available.
 - A third of Windows 7 users and a quarter of Mac users are “very likely” to switch.
 - Flash plugin tops the wish list for improvements, followed by increased speed and a browsing experience that more closely mirrors the computer.

Methodology

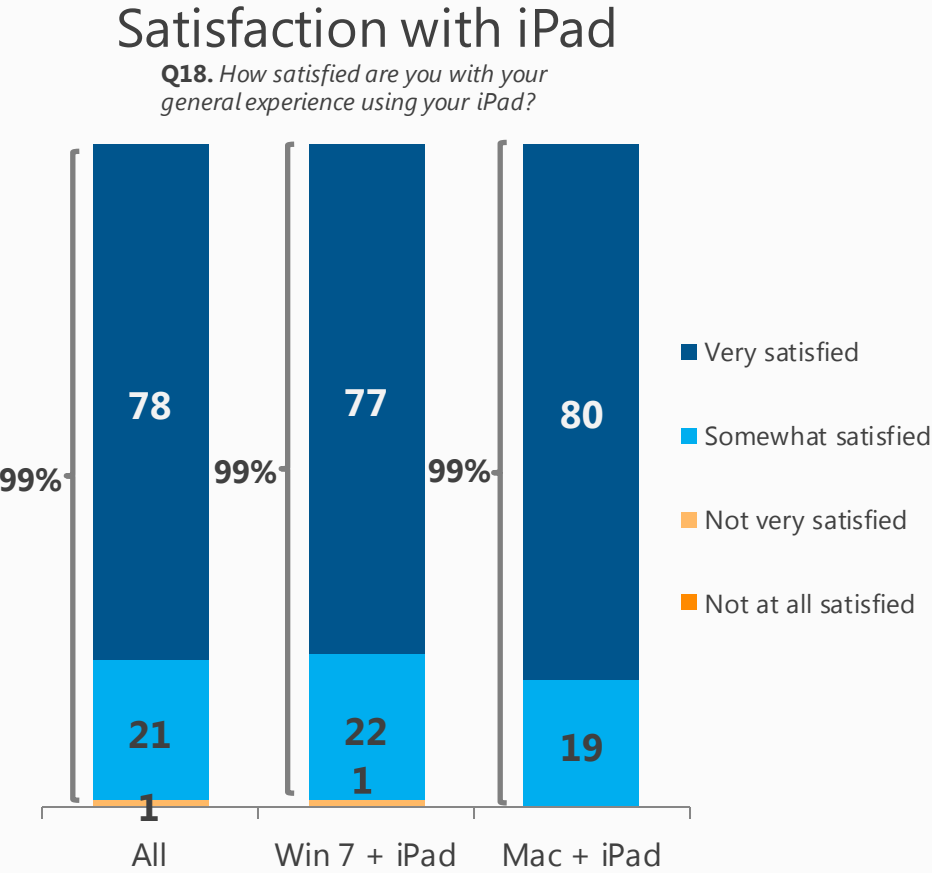
Timing:	September 5-16, 2012														
Research focused on the following topics:	<ol style="list-style-type: none">1. Explore iPad users' overall experiences with browsing on the iPad, including specific likes and pain points2. Compare browsing experience on iPad vs on a Windows 7 PC or a Mac3. Gauge perceptions of Safari and Chrome, including relative strengths and weaknesses														
Audiences:	<p>This project targeted the following consumer audiences:</p> <ul style="list-style-type: none">• Windows 7 + iPad Users (Win 7 + iPad): Respondents who use Windows 7 on their personal or work PC as well as own and use an iPad.• Mac + iPad Users (Mac + iPad): Respondents who use a Mac as their personal or work computer as well as own and use an iPad. <p>PSB targeted 1700 current iPad users (approximately 850 PC users and 850 Mac users) in the U.S. for this research. These sample sizes will provide a sufficiently robust number of completes to be statistically valid for the use of data in a public release.</p>														
Methodology:	<p>Penn Schoen Berland conducted a quantitative online survey in the U.S. among the following respondents:</p> <table><tr><th>Audience</th><th>All</th><th>Win 7 + iPad</th><th>Mac + iPad</th></tr><tr><td>n-size</td><td>1700</td><td>1082</td><td>850</td></tr><tr><td>MoE at 90% confidence</td><td>±1.9%</td><td>±2.4%</td><td>±2.8%</td></tr></table>			Audience	All	Win 7 + iPad	Mac + iPad	n-size	1700	1082	850	MoE at 90% confidence	±1.9%	±2.4%	±2.8%
Audience	All	Win 7 + iPad	Mac + iPad												
n-size	1700	1082	850												
MoE at 90% confidence	±1.9%	±2.4%	±2.8%												

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iPad Satisfaction and Association

- 99% are satisfied with their iPad experience
- 78% are very satisfied
 - Ease of use and convenience are most associated with the iPad



ASSOCIATION WITH IPAD Q23. Which of the following phrases apply the <u>most</u> to your iPad? Please select up to 3. RANKED BY ALL	All	Win 7 + iPad	Mac + iPad
Easy to use	61	58	64
Convenient	60	60	59
Goes with me wherever I go	47	48	45
Variety of apps	46	47	45
Internet access anywhere	27	28	26
Great browsing experience	22	23	21
Simplifies tasks	16	15	17
Other	1	0	1

iPad Likes and Dislikes

Verbatim comments reflect these same preferences: ease of use, portability and convenience are the favorite aspects of an iPad

- While many don't have a specific dislike about their iPad, absence of Flash and high price are among the most common complaints

Like Most about iPad

Q19. What do you like the most about your iPad?



Like Least about iPad

Q20. What do you like the least about your iPad?



Favorite and Least Favorite Activities with iPad

51% say browsing the web is their favorite activity to do specifically on their iPad

- Playing games and social networking are also favored iPad activities
- Least preferred iPad activities include managing personal finances and IM/texting

FAVORITE AND LEAST FAVORITE ACTIVITIES Q21. Which of the following are your top three <u>most</u> favorite activities to do specifically on the iPad? RANKED BY ALL FAVORITE	All		Win 7 + iPad		Mac + iPad	
	Favorite	Least Favorite	Favorite	Least Favorite	Favorite	Least Favorite
Browsing the web	51	5	50	5	53	6
Playing games	37	8	39	8	35	7
Social networking – Facebook, Twitter, MySpace	34	12	36	11	31	13
Email	27	11	25	11	30	11
Watching movies, TV shows and online (like Netflix, Hulu etc.)	26	9	27	10	26	9
Reading books	24	13	23	14	24	12
Watching videos (like YouTube)	19	6	20	5	18	7
Online shopping	12	16	12	15	13	17
Games/Entertainment activities for children	12	13	12	13	12	13
Reading newspapers and magazines online	11	17	10	18	11	16
Chat/Video Chat	9	21	9	22	9	22
Listening to streaming music	8	10	8	9	8	11
Listening to downloaded music	6	10	7	8	4	10
Educational activities (Children/Adult)	6	21	5	22	7	21
Share/Edit Photos	5	19	5	20	5	18
Manage personal finance	4	38	4	37	4	37
IM/Text	3	32	3	32	2	33
Other	2	4	1	3	2	5

Favorite: ■ = 30-49% ■ = 50%+

Least Favorite: ■ = 15-29% ■ = 30%+

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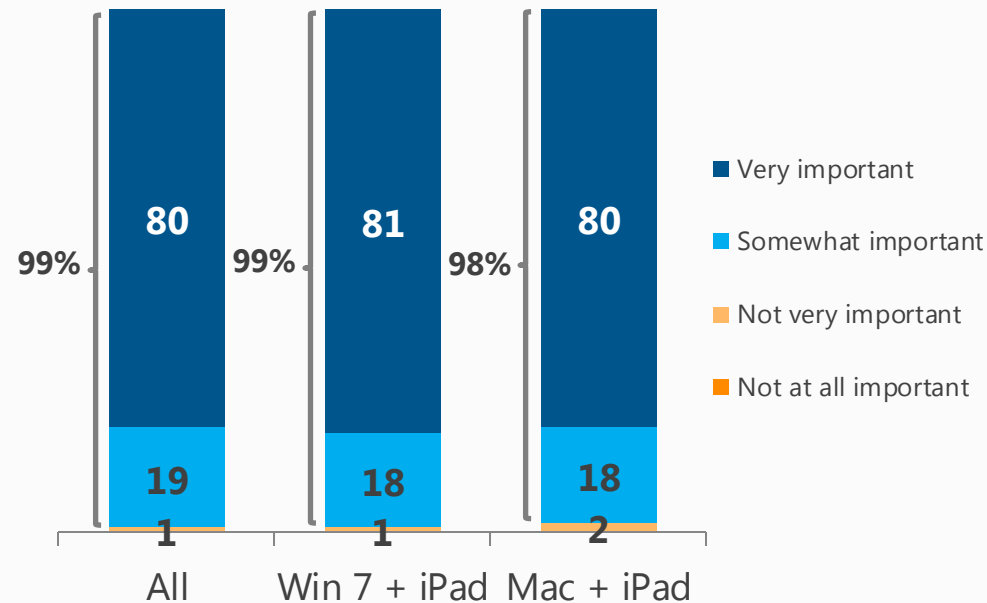
iPad Browsing Experience – Importance and Satisfaction

Internet browsing is an important part of the browsing experience and most are satisfied with it

- 99% say it is important and 80% indicate it is very important
- 42% have some reservations about (are less than very satisfied with) internet browsing as part of their overall iPad experience

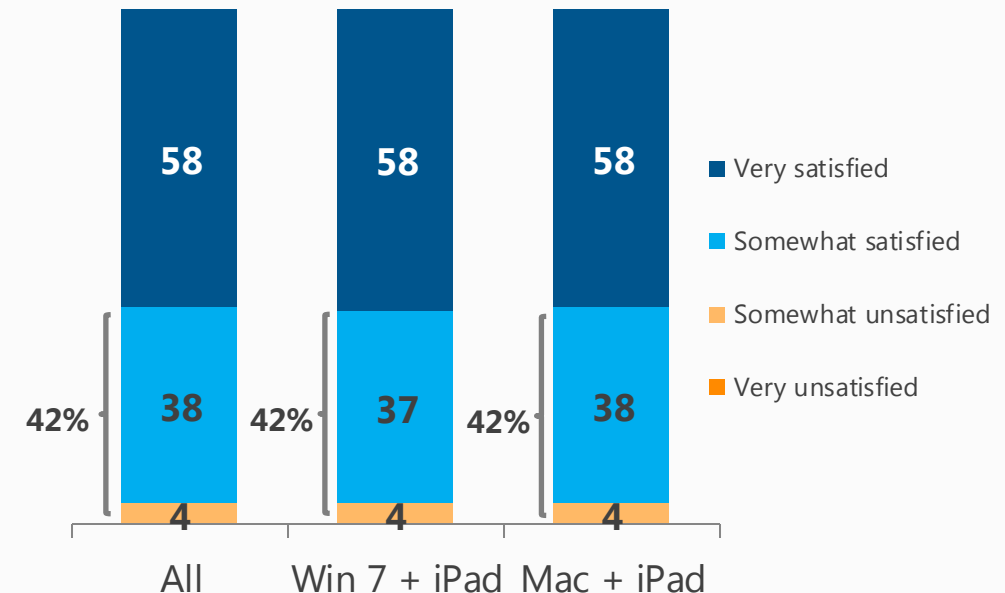
iPad Browser Importance

Q24. How important is the Internet browsing experience on your iPad as part of the overall iPad experience?



iPad Browser Satisfaction

Q25. How satisfied or unsatisfied are you with the Internet browsing experience on your iPad as part of the overall iPad experience?



iPad Preference— Browser or App?

Respondents choose to use an app over the iPad browser for a number of activities

- 72-75% prefer an app for checking weather, updating and browsing Facebook or Twitter, and playing multiplayer games
- Smaller majorities also opt for an app for email, online banking, and watching videos
- The Internet browser on the iPad is the preferred option for shopping related activities, entertainment planning (movie tickets, restaurant bookings), and accessing work applications

PREFERENCE OF APP VS. BROWSER FOR ACTIVITIES Q26-39. Do you prefer to use the Internet browser or an app on your iPad to do each of the following activities? RANKED BY ALL APP ON IPAD	All				Win 7 + iPad				Mac + iPad			
	App on iPad	App on iPad (as % of those who do this activity)	Internet Browser on iPad	Don't do this on my iPad	App on iPad	App on iPad (as % of those who do this activity)	Internet Browser on iPad	Don't do this on my iPad	App on iPad	App on iPad (as % of those who do this activity)	Internet Browser on iPad	Don't do this on my iPad
Check local weather	70	75	24	6	70	74	24	5	71	76	23	6
Update a status on Facebook or Twitter	62	74	22	16	62	74	22	16	63	76	20	17
Check news feed on Facebook or Twitter	61	72	24	15	61	72	24	15	63	75	21	16
Check email	55	57	41	4	53	56	42	4	59	61	38	3
Watch a video	49	53	43	8	49	52	44	7	50	55	41	9
Play a multiplayer online game	42	75	14	43	43	73	16	41	43	78	12	45
Read news	37	42	52	11	38	42	53	9	37	42	52	11
Make an online banking transaction	35	54	29	36	34	53	29	37	38	56	30	32
Check show times for a movie	34	42	48	18	34	41	49	17	36	44	47	17
Check sports scores	33	50	33	34	34	50	34	32	33	52	31	36
Purchase something (buy from an online store, purchase tickets, etc.)	19	24	62	19	19	23	64	17	21	26	60	19
Access work applications or websites	19	31	42	39	19	30	44	37	20	32	43	37
Make a restaurant reservation	19	37	32	49	18	36	32	50	22	40	32	46
Browse online before making a purchase	13	14	79	8	13	14	80	7	14	15	78	8

■ Preferred tool for each activity

iPad Browser Perceptions and Preferences

10-19% find it difficult to use their Internet browser to play multiplayer games, watch videos, access work applications, make banking transactions, restaurant reservations or online purchases, or check email on their iPad

- 60-77% prefer to use the app for social media purposes, checking weather and email, playing multiplayer games and watching videos
- Preference of app vs. browser is less popular for browsing and making online purchases

DIFFICULTY OF BROWSER AND PREFERENCE FOR APP Q40-53. To what extent is it easy or difficult to use an Internet browser to do each of the following activities on your iPad? ["Very" + "Somewhat difficult"] Shown Q54-67. If an iPad app would allow you to do the same thing that you would do on an Internet browser on the iPad, would you prefer to use the app or the Internet browser? RANKED BY ALL DIFFICULT ON INTERNET BROWSER	All			Win 7 + iPad			Mac + iPad		
	Difficult on Internet browser	Difficult on Internet Browser (as % of those who do this activity)	Would prefer to use app	Difficult on Internet browser	Difficult on Internet Browser (as % of those who do this activity)	Would prefer to use app	Difficult on Internet browser	Difficult on Internet Browser (as % of those who do this activity)	Would prefer to use app
Watch a video	13	14	60	13	15	59	11	12	60
Play a multiplayer online game	12	19	67	12	20	66	11	19	68
Access work applications or websites	10	14	43	10	14	43	9	13	45
Make an online banking transaction	9	12	57	7	11	57	9	13	59
Check email	8	10	64	9	9	63	9	10	66
Purchase something (buy from an online store, purchase tickets, etc.)	8	10	37	8	9	37	9	10	36
Update a status on Facebook or Twitter	7	8	72	6	7	72	8	9	73
Check news feed on Facebook or Twitter	7	8	72	7	8	71	7	8	74
Make a restaurant reservation	7	11	49	8	12	47	8	13	51
Check show times for a movie	6	7	57	5	6	55	7	8	60
Read news	5	6	52	5	5	53	6	7	52
Browse online before making a purchase	5	6	29	6	6	29	5	6	30
Check local weather	5	5	77	5	5	76	5	5	78
Check sports scores	4	6	58	5	6	57	4	6	60

Reactions to Browsing Scenarios

85% have experienced a negative scenario with their iPad, often more than one

- 40-43% have experienced sites/applications not working right or slow, buttons or controls hard to navigate via touch and/or difficulty typing
- But the most frustrating experiences are sites suddenly not responding or shutting down and inability to complete an online transactions; it is the latter, along with inability to access work applications, that has the most potential for driving users to seek out better alternatives

SCENARIOS EXPERIENCED ON THE IPAD AND REACTIONS CREATED Q68. Which of the following scenarios have you experienced with your iPad? Please select all that apply. Q69-77. What is typically your reaction to this scenario happening? ["Very" + "Somewhat frustrating"] Shown Q78-86. You previously indicated that the following scenarios were frustrating. Based on each of these scenarios, which of the following are you more likely to do? RANKED BY ALL EXPERIENCED	All			Win 7 + iPad			Mac + iPad		
	Experienced	Frustrated	Seek out better alternatives	Experienced	Frustrated	Seek out better alternatives	Experienced	Frustrated	Seek out better alternatives
Certain sites and applications don't work as intended in the Internet browser <i>n=1082/492/327 850/359/238</i>	43	67	61	45	66	62	42	66	58
Certain sites and applications feel slow <i>n=1082/462/241 850/353/178</i>	42	51	46	43	53	45	42	50	47
Buttons or controls in certain sites are too small or difficult to navigate using touch <i>n=1082/448/257 850/333/197</i>	40	58	47	41	57	45	39	59	49
Difficulty in typing information <i>n=1082/433/268 850/340/184</i>	40	58	44	40	62	43	40	54	45
Sites will suddenly stop responding or shut down without warning <i>n=1082/382/291 850/282/203</i>	34	75	48	35	77	49	33	71	46
Menus and features in certain sites or applications are not responsive to touch <i>n=1082/337/215 850/273/180</i>	31	66	59	31	64	56	32	65	62
Difficulty playing a video in the Internet browser <i>n=1082/348/218 850/233/138</i>	30	62	63	32	62	63	27	60	64
Difficulty playing an online game in the Internet browser <i>n=1082/206/95 850/142/62</i>	18	46	58	19	46	62	17	43	50
Difficulty accessing work applications in the Internet browser <i>n=1082/149/90 850/129/77</i>	13	59	71	14	60	68	15	60	71
Difficulty completing an online transaction (online banking or purchase) in the Internet browser <i>n=1082/132/96 850/109/88</i>	12	76	75	12	73	78	13	81	72
Other	2			2			2		
None of the above	15			15			16		

Difficult Activities– Watching videos

Those who said watching videos is difficult in the browser on the iPad overwhelmingly point to lack of support for Flash as the top reason

- 10% believe videos feel slow on the iPad

REASONS IPAD MAKES WATCHING VIDEOS DIFFICULT <i>Q87. What is the top reason you feel that the iPad browser makes it difficult to watch videos in the Internet browser?</i> RANKED BY WIN 7 + IPAD	All n=514	Win 7 + iPad n=348	Mac + iPad n=233
Cannot play because “Flash is not supported” or “Plugin not available”	77	78	77
Feels slow	10	9	11
Sites and applications don’t work or close without warning	4	5	4
Lack of physical keyboard	4	4	3
Menus and features in the site or applications are not responsive to touch	2	2	2
Menus and features in the site are too small or difficult to navigate using touch	2	2	3
Other	1	1	1

Difficult Activities– Online Gaming

- Similarly, among those who say playing online games is difficult on the iPad, 55% blame the lack of support for Flash
- 9% PC users also point to the lack of a physical keyboard, say online games on the iPad feel slow and game control features don't work as intended
 - Mac users find the lack of a physical keyboard slightly less troublesome

REASONS IPAD MAKES PLAYING ONLINE GAMES DIFFICULT <i>Q88. What is the top reason you feel that the iPad browser makes it difficult to play online games in the Internet browser?</i> RANKED BY WIN 7 + IPAD	All n=303	Win 7 + iPad n=206	Mac + iPad n=142
Cannot play because "Flash is not supported" or "Plugin not available"	55	53	53
Lack of physical keyboard	9	10	6
Feels slow	9	8	11
Game controls and features don't work as intended	9	8	10
Game controls are too small or difficult to navigate using touch	7	8	8
Game stops responding or shuts down without warning	6	7	4
Game controls and features are not responsive to touch	5	5	8
Other	1	0	1

Difficult Activities– Completing Online Transactions

34% of those who find online transactions on the iPad difficult complain that menus and options don't appear or work as intended

- Mac users are slightly less concerned about this than Windows 7 users, but they are more concerned about sites and applications shutting down without warning (19%)

REASONS IPAD MAKES COMPLETING ONLINE TRANSACTIONS DIFFICULT Q89. What is the top reason you feel that the iPad browser makes it difficult to complete online transactions? RANKED BY WIN 7 + IPAD	All n=208	Win 7 + iPad n=132	Mac + iPad n=109
Menus and options do not appear properly or don't work as intended on this site	34	39	31
Sites and applications shut down without warning	16	13	19
Menus and features in the site are too small or difficult to navigate using touch	13	11	12
Lack of physical keyboard	12	11	9
Menus and features in the site or applications are not responsive to touch	11	13	10
Feels slow	11	10	13
Other	4	2	6

Difficult Activities– Accessing Work Applications

For those who find accessing work applications on the iPad difficult, sites and applications not working are the top reason (26%)

- Menus not working as intended and sites not responding and shutting down are cause for concern among about 15%

REASONS IPAD MAKES ACCESSING WORK APPLICATIONS DIFFICULT <i>Q90. What is the top reason you feel that the iPad browser makes it difficult to access work applications?</i> RANKED BY WIN 7 + IPAD	All n=226	Win 7 + iPad n=149	Mac + iPad n=129
Sites and applications don't work	26	26	22
Menus and options do not appear properly or don't work as intended on this site	16	16	17
Sites and applications stop responding or shut down without warning	15	17	16
Feels slow	12	12	12
Lack of physical keyboard	12	11	9
Menus and features in the site are too small or difficult to navigate using touch	9	9	9
Menus and features in the site or applications are not responsive to touch	8	5	12
Other	3	3	2

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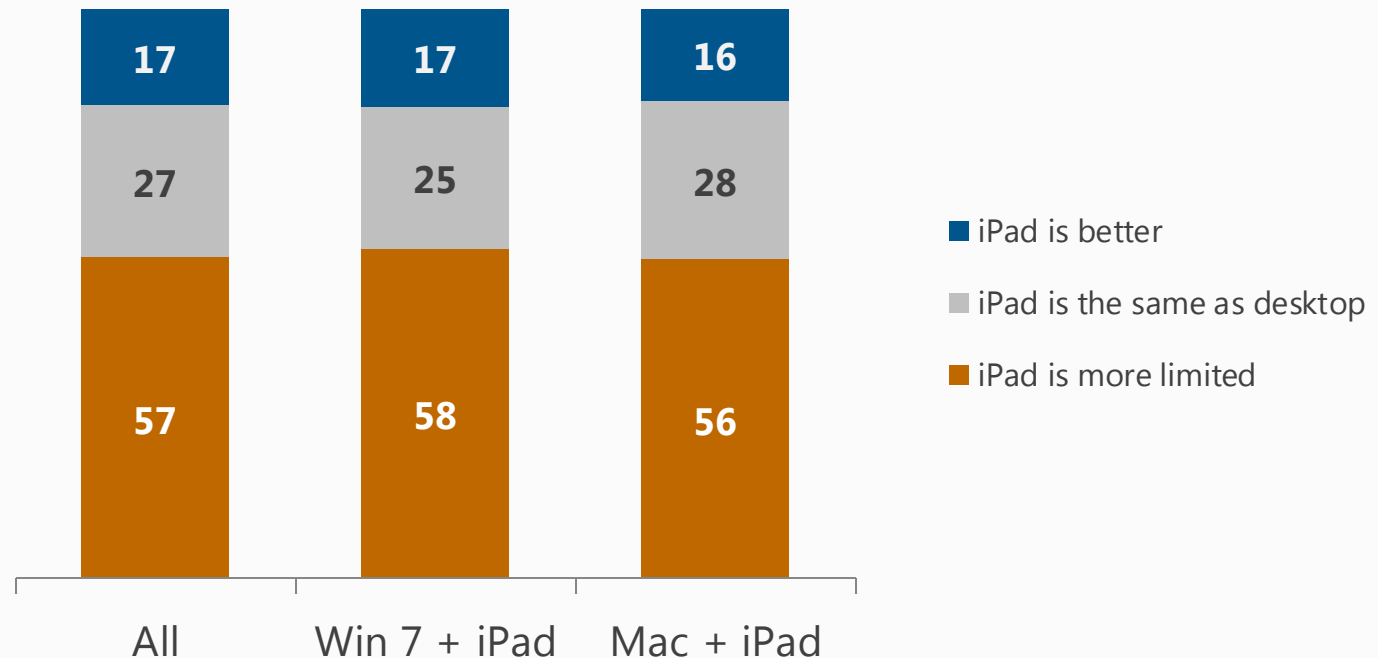
Technology Profiling / Demographics

iPad vs. Computer Browsing— Does Experience Compare?

Their favorite websites in mind, 57% say their browsing experience is more limited on their iPad than their computer browser

COMPARING IPAD TO DESKTOP EXPERIENCE WHEN VISITING FAVORITE SITES

Q91. Overall, comparing the mobile experience of your favorite websites on your iPad compared to the desktop experience on your PC or Mac, which of the following is true?



iPad vs. Computer– Which is Easier?

Users find most activities easier to accomplish in their computer browser rather than the iPad browser

- 60-78% say their computer browser makes it easier to make online purchases, banking transactions or restaurant reservations, access work applications, browse while shopping, play multiplayer games or watch videos
- Checking weather and Facebook/Twitter news feed are the only areas where the iPad browser offers any notable advantage

DEVICE EASIER TO USE FOR THE FOLLOWING ACTIVITIES Q92-105. Which device makes it easier to do each of the following activities? RANKED BY ALL EASIER ON PC/MAC	All			Win 7 + iPad			Mac + iPad		
	Internet Browser on my PC/Mac	Internet Browser on my PC/Mac (as % of those who do this activity)	Internet Browser on my iPad	Internet Browser on my PC/Mac	Internet Browser on my PC/Mac (as % of those who do this activity)	Internet Browser on my iPad	Internet Browser on my PC/Mac	Internet Browser on my PC/Mac (as % of those who do this activity)	Internet Browser on my iPad
Purchase something (buy from an online store, purchase tickets, etc.)	77	78	21	76	77	22	77	79	21
Make an online banking transaction	70	77	22	70	76	22	70	75	23
Browse online before making a purchase	69	70	29	66	67	32	72	74	26
Access work applications or websites	59	75	19	61	75	20	59	76	18
Watch a video	59	61	38	58	60	39	59	61	37
Check email	55	55	45	53	53	47	56	56	43
Read news	48	51	47	46	48	50	50	53	45
Play a multiplayer online game	47	66	24	51	67	25	43	64	24
Update a status on Facebook or Twitter	45	49	46	44	48	48	45	50	45
Make a restaurant reservation	45	62	28	43	60	29	47	63	27
Check show times for a movie	45	49	46	43	47	48	46	51	44
Check news feed on Facebook or Twitter	40	45	50	39	43	52	41	46	48
Check local weather	36	36	62	34	35	64	37	38	60
Check sports scores	34	46	40	34	45	42	35	48	37

■ Easiest device for each activity

iPad vs. Computer– Which is Preferred?

Similarly, users generally prefer to use the Internet browser on their iPad for activities limited to consuming information, while they turn to the browser on their PC/Mac for activities that require more active involvement

- 62-72% prefer the PC/Mac browser for activities such as online shopping/browsing, online banking or accessing work applications
- For many other activities, including some of those they find easier on the PC/Mac, users opt for the browser on their iPad

DEVICE PREFERRED TO USE FOR THE FOLLOWING ACTIVITIES Q106-119. Which device would you prefer to use to do each of the following activities? RANKED BY ALL PREFER BROWSER ON PC/MAC	All			Win 7 + iPad			Mac + iPad		
	Internet Browser on my PC/Mac	Internet Browser on my PC/Mac (as % of those who do this activity)	Internet Browser on my iPad	Internet Browser on my PC/Mac	Internet Browser on my PC/Mac (as % of those who do this activity)	Internet Browser on my iPad	Internet Browser on my PC/Mac	Internet Browser on my PC/Mac (as % of those who do this activity)	Internet Browser on my iPad
Purchase something (buy from an online store, purchase tickets, etc.)	70	72	28	69	70	30	72	73	26
Make an online banking transaction	65	70	27	63	69	28	66	71	26
Browse online before making a purchase	61	62	37	60	61	39	64	65	35
Access work applications or websites	54	68	25	55	68	26	53	68	25
Check email	49	49	50	47	48	52	50	51	49
Watch a video	47	49	50	47	48	51	47	49	49
Play a multiplayer online game	42	57	31	45	59	31	38	56	30
Read news	41	43	54	40	42	55	42	45	52
Make a restaurant reservation	39	53	35	37	50	37	41	54	35
Update a status on Facebook or Twitter	38	42	52	37	40	55	39	44	50
Check show times for a movie	38	42	53	37	40	55	40	44	51
Check news feed on Facebook or Twitter	36	40	55	34	38	57	37	42	52
Check local weather	32	33	66	31	32	67	34	35	64
Check sports scores	29	39	45	30	40	46	29	40	43

■ Preferred device for each activity

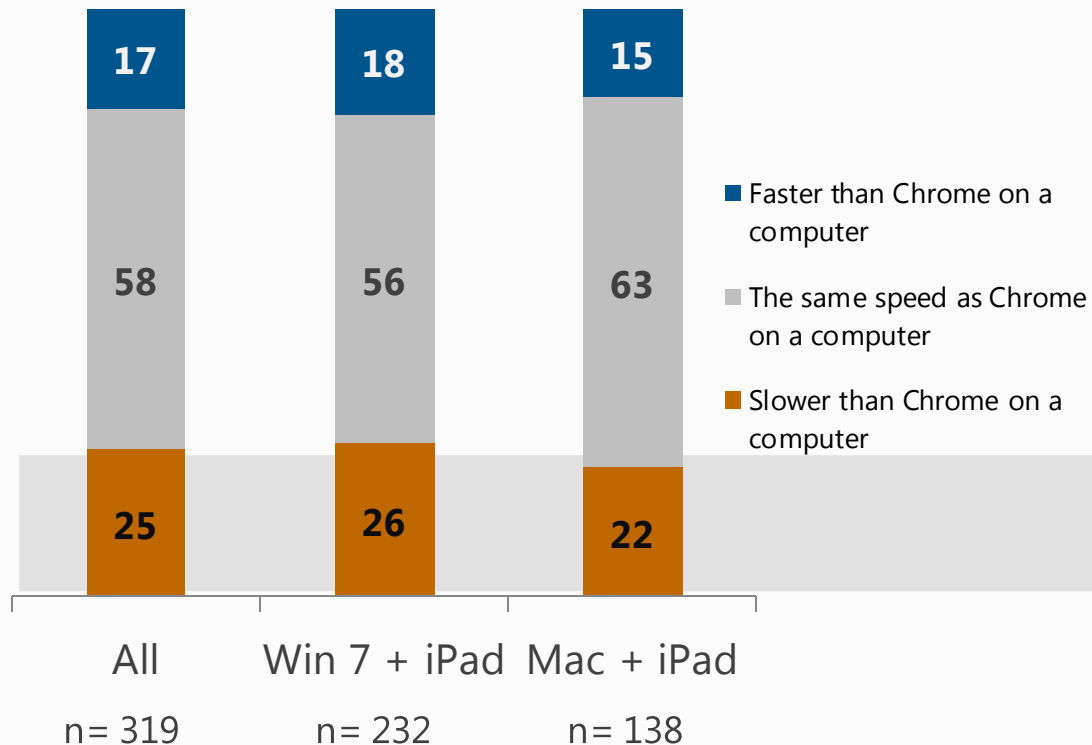
Chrome Speed on iPad vs. Computer

25% Chrome users consider Chrome on their iPad slower than Chrome of their PC or Mac

- Among these, 66% consider it somewhat or much slower

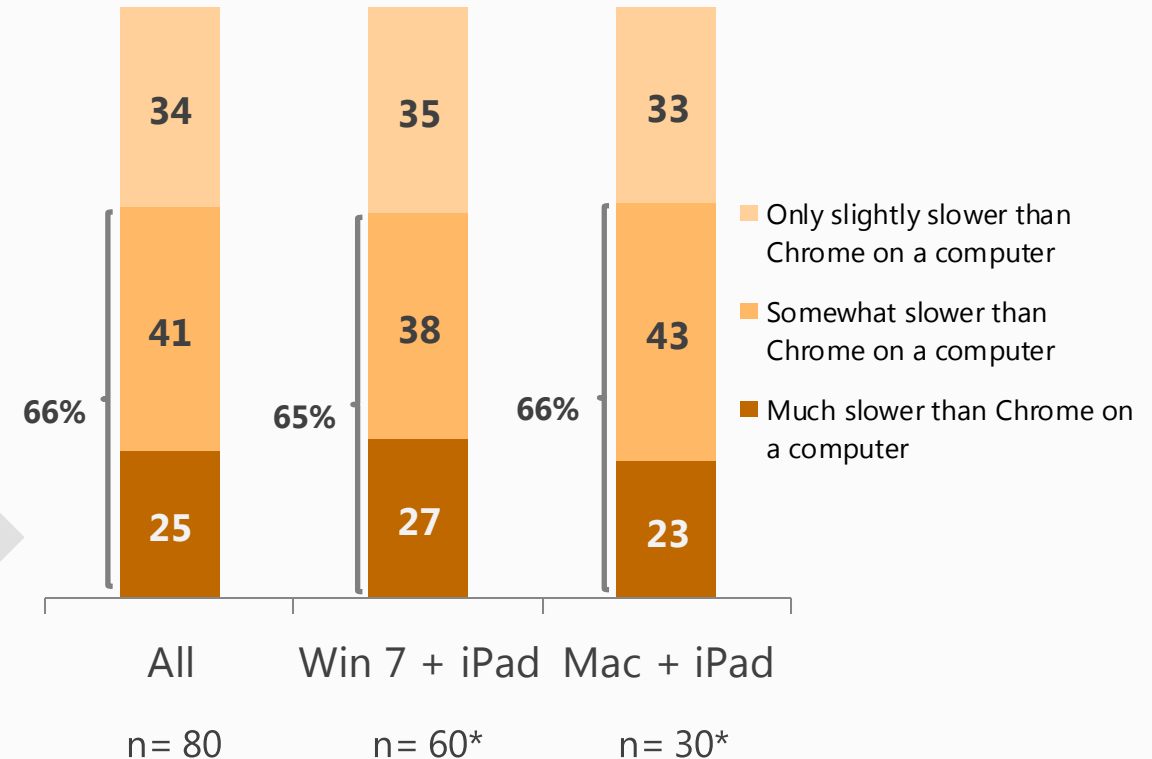
Speed of Chrome on iPad vs. Computer

Q120. How does your experience using Chrome on your iPad compare with your experience using Chrome on your computer? Would you say Chrome on iPad is...?



Chrome Slower on iPad vs. on Computer

Q121. You mentioned that you find the using Chrome on an iPad slower than using it on a computer. To what degree do you find Chrome on an iPad slower?



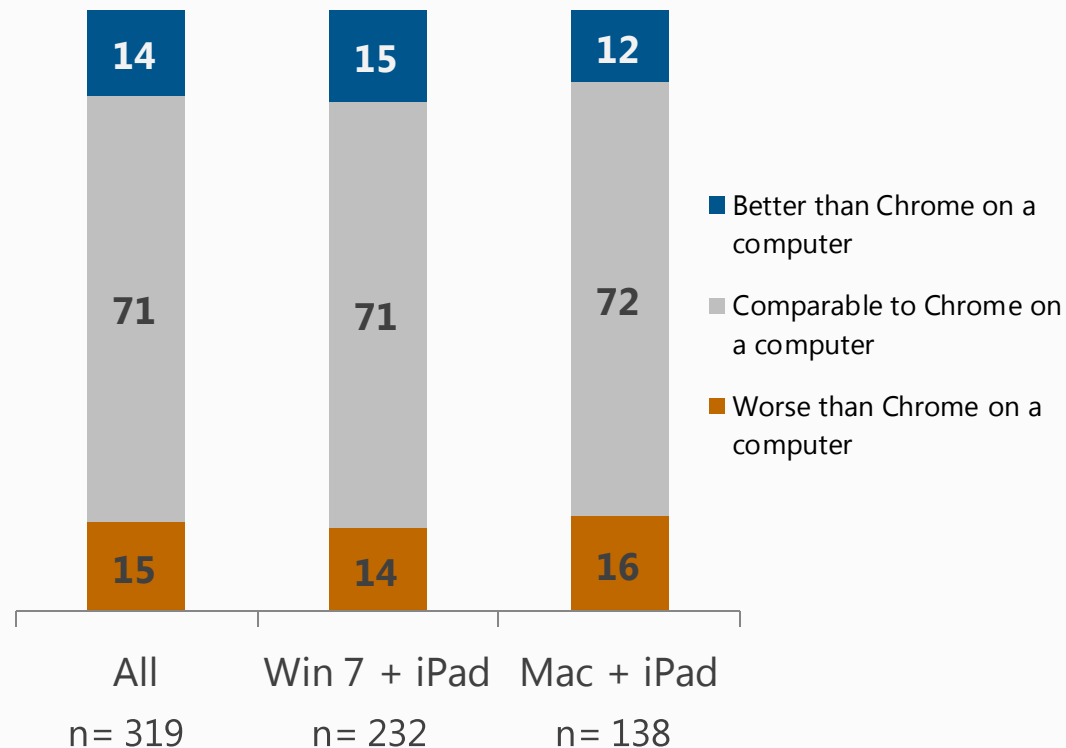
Chrome Experience on iPad vs. Computer

Few find the Chrome experience on their iPad inferior to the Chrome experience on their computer, but just as few find it better

- Overall, most are satisfied with their Chrome experience on their iPad, and 48% are very satisfied with it

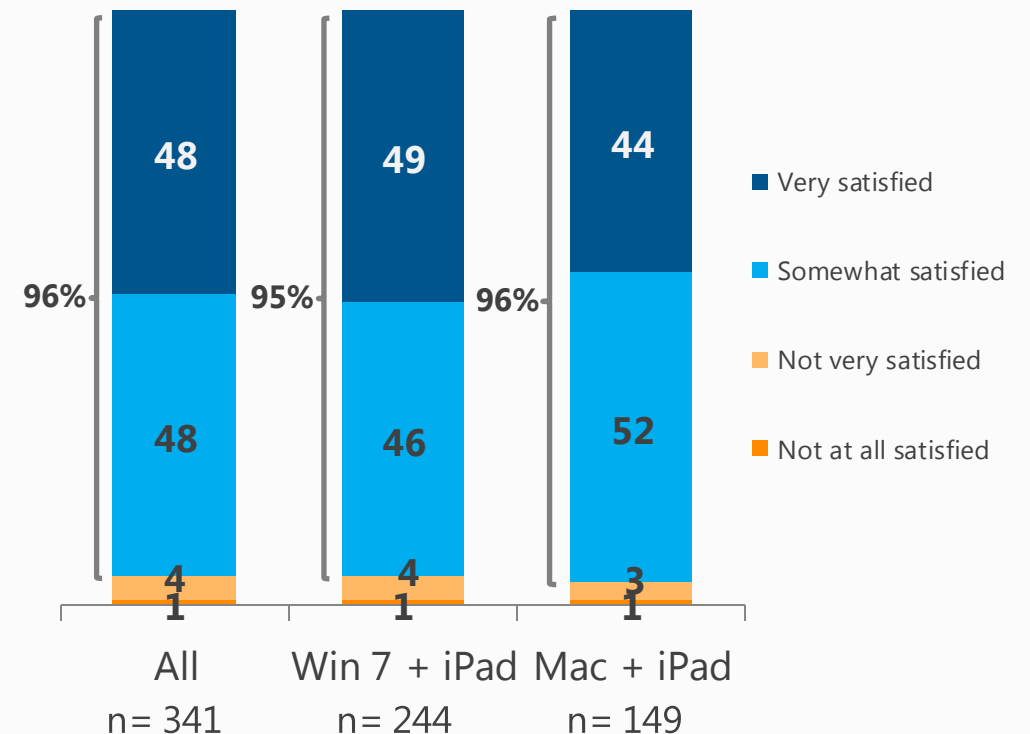
Chrome Experience on iPad vs. Computer

Q122. How does your experience using Chrome on your iPad compare with your experience using Chrome on your computer? Would you say Chrome on iPad is...?



Satisfaction with Chrome Experience on iPad

Q123. How satisfied are you with your experience using Chrome on your iPad?



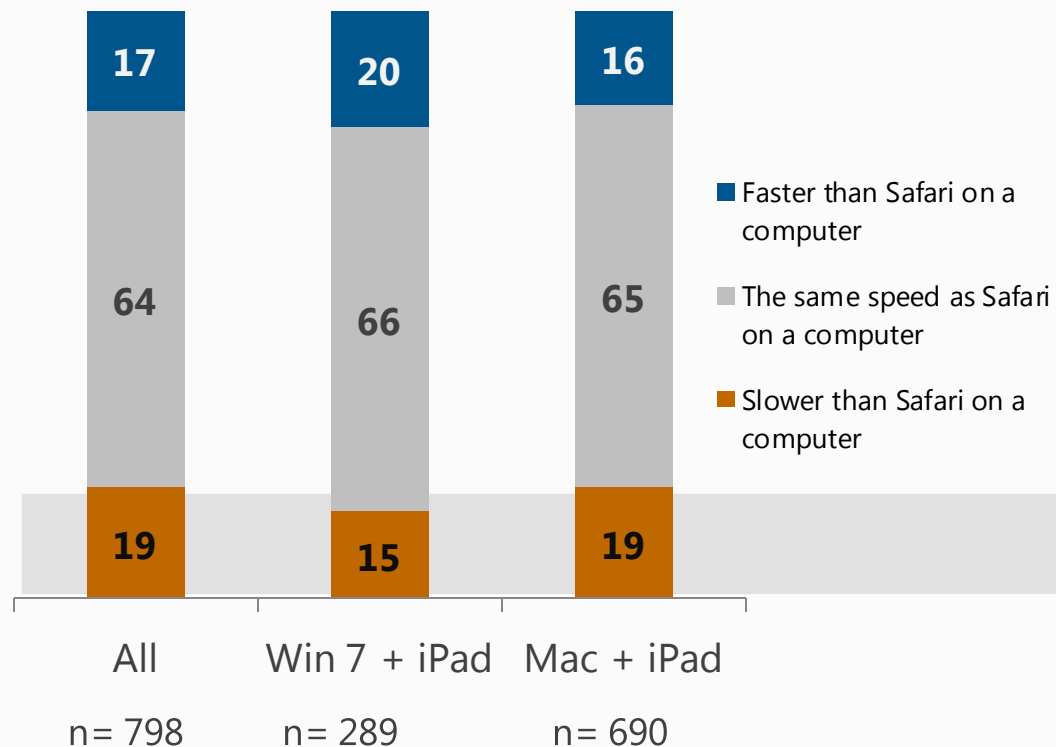
Safari Speed on iPad vs. Computer

64% don't see a difference in speed between their Safari browser on the computer and on the iPad

- The rest are split among those who see one or the other device as faster
- Among those who say Safari on the iPad is slower, 64% consider it is somewhat or much slower

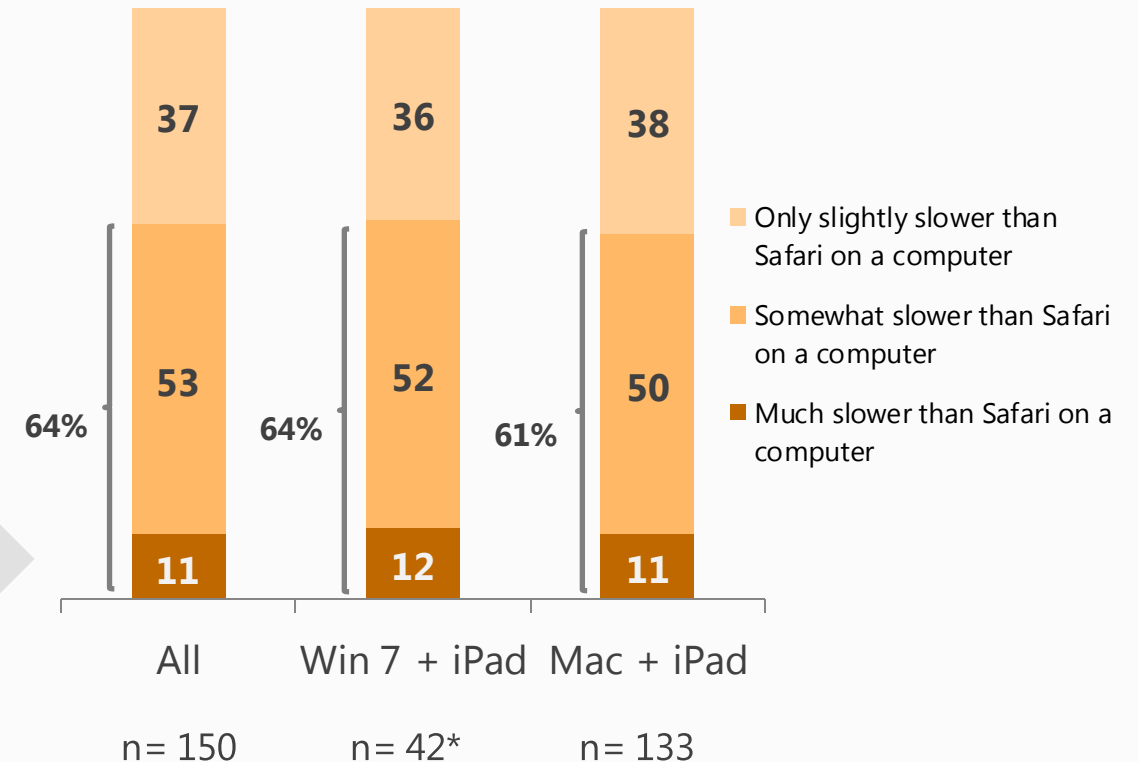
Speed of Safari on iPad vs. Computer

Q124. How does your experience using Safari on your iPad compare with your experience using Safari on your computer? Would you say Safari on iPad is...?



Safari Slower on iPad vs. on Computer

Q125. You mentioned that you find using Safari on an iPad slower than using it on a computer. To what degree do you find Safari on an iPad slower?



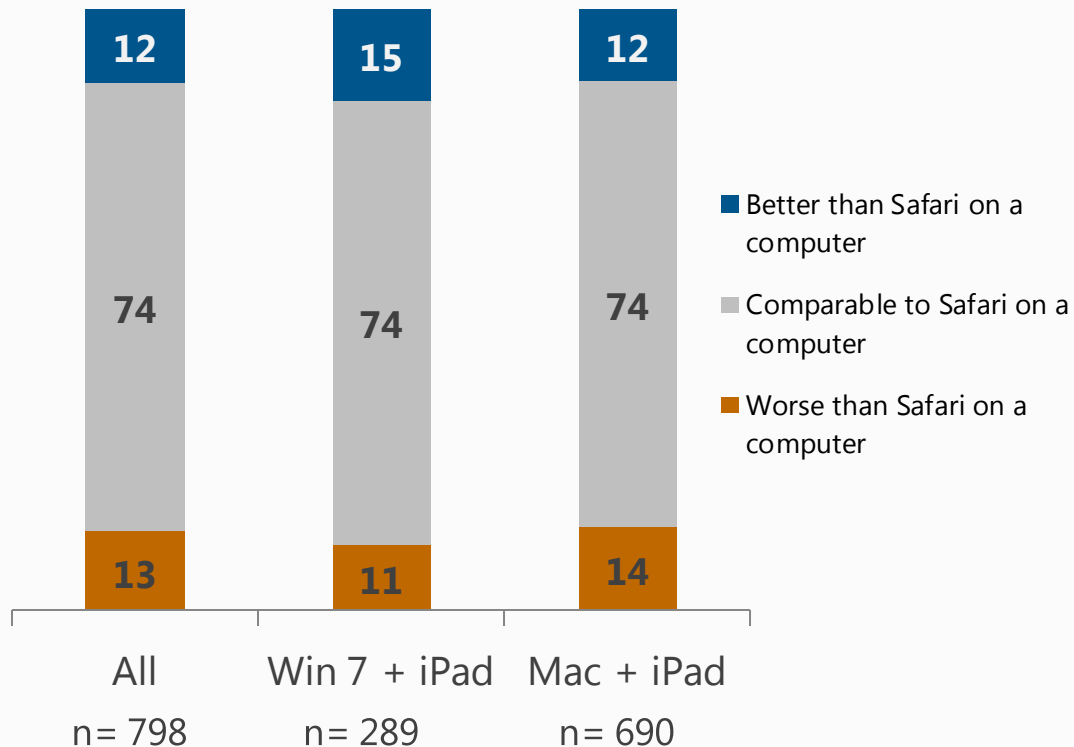
Safari Experience on iPad vs. Computer

Few find the Safari experience on their iPad inferior to the Safari experience on their computer, but just as few find it better

- Overall, most are satisfied with their Safari experience on their iPad, and 45% are very satisfied with it

Safari Experience on iPad vs. Computer

Q126. How does your experience using Safari on your iPad compare with your experience using Safari on your computer? Would you say Safari on iPad is...?



Satisfaction with Safari Experience on iPad

Q127. How satisfied are you with your experience using Safari on your iPad?

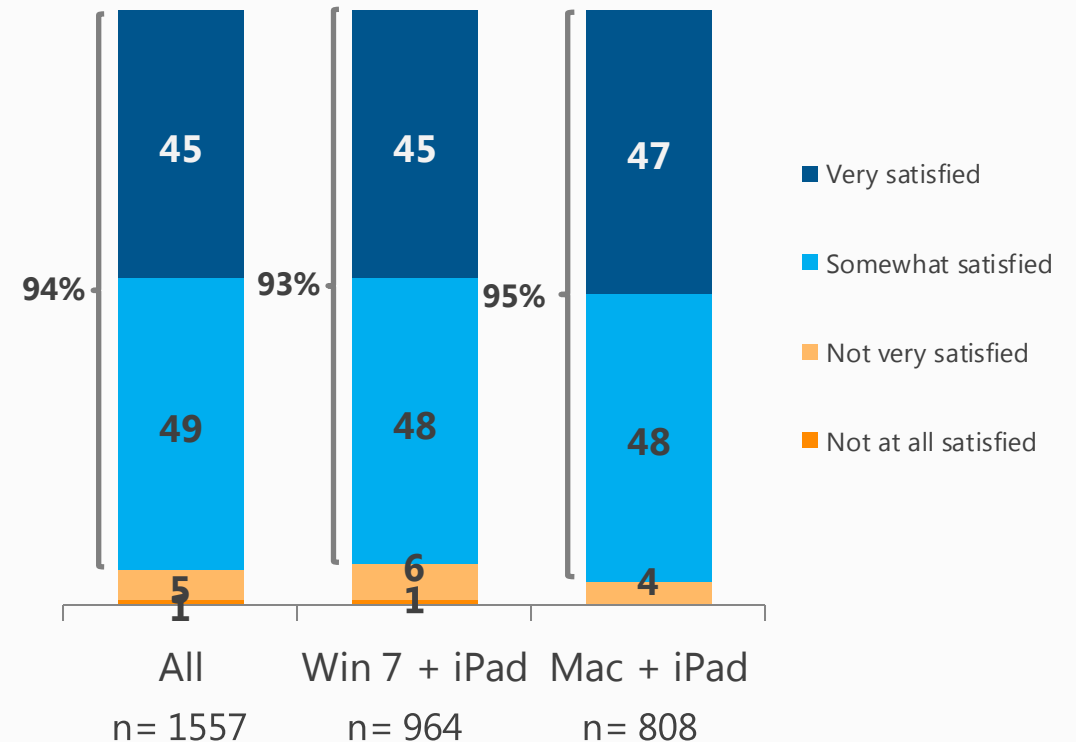


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Interest in New Tablet

Flash plugin is one of the most desired improvement ideas for the iPad, as well as increased speed and an overall similar browsing experience to a computer.

- While respondents are satisfied with their iPad browsing experience, 72% are open to switching if a tablet with a better browser became available
 - In fact, 29% are “very likely” to switch
 - Likelihood to switch is higher among Windows 7 users than among Mac users

Improvement Ideas for iPad Browsing Experience

Q130. If you were able to design a tablet with an improved Internet browser experience, what would you improve about the current iPad browsing experience?

Allow Flash so more website functions can work properly.- **Win 7 + iPad User**

The internet browsing should be the same as a laptop or desktop.- **Mac + iPad User**

ALLOW FLASH PLUG IN!- **Mac + iPad User**

I would have a different look for the browser because websites on the computer don't necessarily translate well to the iPad given different dimensions.- **Win 7 + iPad User**

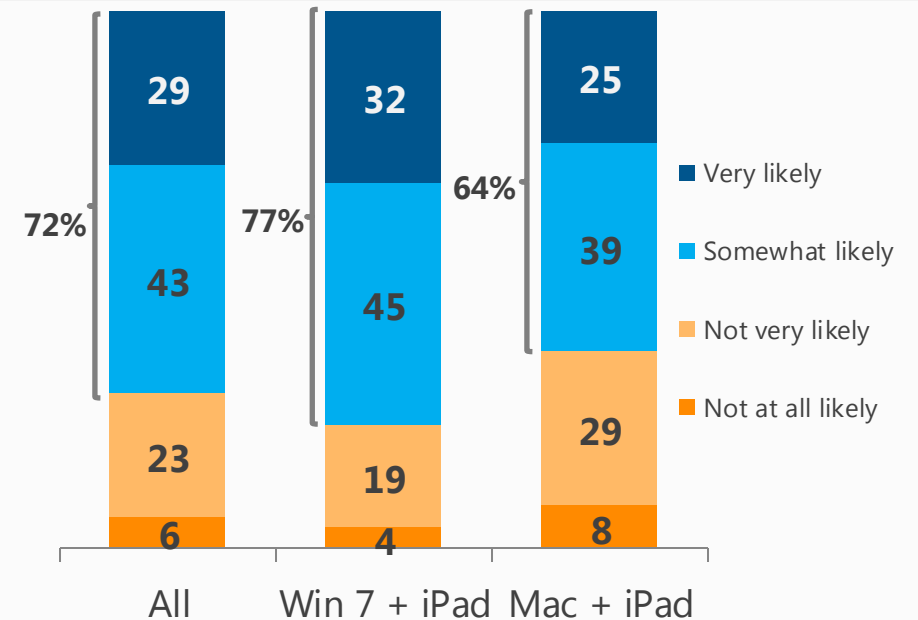
I would like it to move faster. Easier to type.- **Mac + iPad User**

It would work sites like a PC.- **Win 7 + iPad User**

I would have a different look for the browser because websites on the computer don't necessarily translate well to the iPad given different dimensions.- **Win 7 + iPad User**






Fast speed and available plug-ins to access all the videos and other technology, plus not cause issues with trying to print wirelessly.- **Mac + iPad User**

Likelihood to Switch to Tablet with Better Browsing Experience



Q131. If a tablet were released that proved to have a better Internet browsing experience than the current experience on the iPad, how likely would you be to switch to this new tablet?

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Technology Profiling—Email Usage

Gmail is the most commonly used personal email service for both audiences, followed by Yahoo! and Hotmail.

- Outlook and Gmail are the top two most common email services for work purposes, Outlook being #1 for Windows 7 users and Gmail #1 for Mac users

PERSONAL EMAIL USAGE Q133. Which of the following do you currently use for your personal email? Q134. Which of the following is your primary email for personal purposes? Please select only one. RANKED BY WIN 7 + IPAD USE AS EMAIL	All		Win 7 + iPad		Mac + iPad	
	Use as Email	Use as Primary	Use as Email	Use as Primary	Use as Email	Use as Primary
Gmail	62	41	61	41	63	43
Yahoo!	45	29	47	30	44	26
Hotmail	26	12	28	14	23	11
MSN	6	2	7	3	5	1
Live	5	1	5	1	4	2
Other	17	14	15	12	18	17
None of the above	1		0		1	

WORK EMAIL USAGE Q135. Which of the following do you currently use for your work email? Q136. Which of the following is your primary email for work purposes? Please select only one. RANKED BY WIN 7 + IPAD USE AS EMAIL	All		Win 7 + iPad		Mac + iPad	
	Use as Email	Use as Primary	Use as Email	Use as Primary	Use as Email	Use as Primary
Outlook	28	27	33	32	24	24
Gmail	31	30	30	29	33	31
Yahoo!	14	12	14	13	14	11
Hotmail	8	5	8	6	8	5
MSN	3	2	3	2	4	2
Live	2	1	2	1	2	1
Other	9	22	7	16	11	26
None of the above	20		16		21	

Technology Profiling— Mobile and Tablet Device Usage

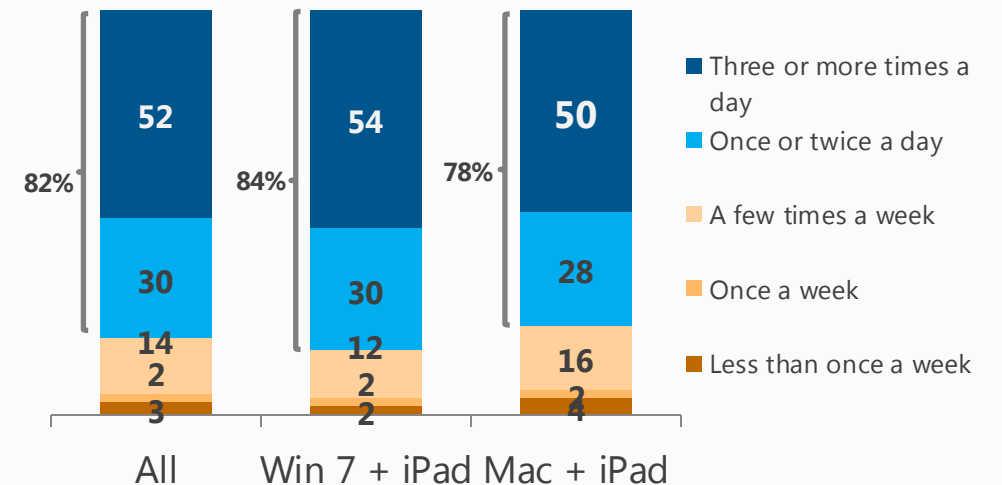
The iPhone is the most commonly used smartphone for both audiences, although even more popular among Mac users

- Although the Android OS places second for both audiences, it is more commonly found among Windows 7 users than Mac users
- Both Windows 7 and Mac users use their iPad frequently, however Windows 7 users are more likely than Mac users to use their iPad at least once a day (84% vs. 78%)

SMART PHONE Q132. You previously stated you own or use a smartphone. Which operating system runs on the mobile phone you use most often? RANKED BY WIN 7 + IPAD	All (n=1471)	Win 7 + iPad (n=945)	Mac + iPad (n=741)
iPhone OS	63	57	75
Android OS	27	32	18
Blackberry OS	5	5	4
Windows Phone	2	3	1
Windows Mobile	1	2	1
Palm OS	0	0	1
Symbian OS	0	0	0
Other	1	1	0

Frequency of Internet Browser Use on iPad

Q137. How frequently do you use the Internet browser on your iPad?



Demographics

GENDER Q1. Please indicate your gender:	All	Win 7 + iPad	Mac + iPad
Male	36	39	33
Female	64	61	67
AGE Q2. What is your age?			
18-24	18	17	18
25-34	39	40	40
35-44	21	23	18
45-54	11	12	10
55-64	8	7	8
65+	3	2	5
PARENT Q141. Do you have children under the age of 18 living in your home?			
Yes	49	52	44
No	51	48	56

EMPLOYMENT STATUS Q138. Which of the following best describes your employment status?	All	Win 7 + iPad	Mac + iPad
Employed by someone else, working 30 hours or more per week	55	60	55
Employed part-time by someone else, working less than 30 hours per week	10	10	10
Self-employed	7	7	8
Student	8	6	10
Retired	4	3	6
Not currently employed, but seeking employment	4	4	2
Other (stay at home parent, etc.)	11	11	9
ANNUAL HOUSEHOLD INCOME Q139. Could you please indicate which of the following categories best represents your total <i>annual household income before taxes and deductions</i> ?			
Less than \$39,999	15	15	13
\$40,000-\$49,999	12	12	13
\$50,000-\$74,999	24	26	21
\$75,000-\$99,000	21	22	20
\$100,000-\$149,999	19	18	19
\$150,000-\$199,999	5	6	7
\$200,000 and above	4	3	6

Demographics

MARITAL STATUS Q140. What is your marital status?	All	Win 7 + iPad	Mac + iPad
Currently married, or living as married	69	70	68
Widowed	1	1	2
Divorced	3	3	3
Separated	1	1	0
Never married	26	25	27
RACE/ETHNICITY Q142. Which of the following do you consider yourself?			
White / Caucasian	79	78	79
Black / African American / Caribbean-American	6	6	6
Asian	10	11	9
American Indian	1	1	1
Pacific Islander	0	0	0
Other	3	3	3
Prefer not to say	1	1	2
HISPANIC / SPANISH / LATINO? Q143. Would you consider yourself to be Hispanic, Spanish or Latino?			
Yes	11	11	11
No	89	89	89