The State of the User Experience

The State of the User Experience is Limelight Networks' first in a series of new annual surveys that explores consumer perceptions around their website experiences.

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Executive Summary

"The State of the User Experience" is Limelight Networks' first in a series of new annual surveys that explores consumer perceptions around their website experiences.

The survey report is based on responses that Limelight Networks received from 1,115 consumers ranging in demographics, gender, and education. Key findings from the survey include:

- Performance Is Key to a Great Web Experience
- Consumer Web Use is Increasingly Mobile
- The Value of Web Experience Personalization Remains to be Seen

Performance Is Key To a Great Web Experience

Website performance is key to a successful digital experience. In fact, data from Google, Amazon, and Bing have shown that even the slightest slow down can have demonstrable impact on the bottom line. In our survey, we found that a high-performing website is top of mind with consumers.

The majority of survey respondents (52%) indicated that a high-performing website (streaming with no buffering, pages loading quickly, etc.) was the most important expectation for a digital experience while 60% indicated that they aren't willing to wait more than five seconds for a webpage to load before becoming frustrated and leaving the site (just over 20% aren't willing to even wait three seconds for the webpage to load before they leave the site).

What does that mean for the bottom line? Survey results indicated that over 30% of respondents would leave and buy a product from a competitor if a website is slow while 82% of respondents indicated that they would likely recommend a brand to a friend if they had a positive experience with the website1.

Together, these survey results point to an interesting trend about the importance of website performance to business success—if businesses want to win and retain business, they must provide a digital experience that exceeds consumer expectations for performance. Businesses need to educate themselves on the challenges and intricacies of delivering a high performance digital experience to ensure hidden latency issues don't disrupt a user's interaction with the brand.

Consumer Web Use is Increasingly Mobile

Web access was once shackled to desktop computers but consumers are increasingly mobile with their access. According to our survey, over 50% indicated that most of the time they use either a smartphone or a tablet to access websites. Over 85% use a mobile device at least some of the time to access websites.

And this is where the challenge arises—over 40% of respondents expected websites to be equally fast whether on mobile or desktop.

Delivering great website experiences to mobile devices is inherently more complicated. There are a multitude of considerations that businesses must keep in mind when designing and delivering experiences to smaller screens. This finding exacerbates the first trend, demanding that organizations implement strategies not only to handle delivering a high-performance website but to address mobile in particular.

Executive Summary

The Value of Web Experience Personalization Remains to be Seen

Many organizations today are moving towards creating a more personalized web experience. And yet, when compared with the desire for performance, respondents ranked the need for a personalized experience last from three other choices.

In addition, almost 40% of respondents indicated that they didn't want a website to remember them from previous visits.

Part of the problem may stem from what consumers perceive personalization will cause—perhaps they inherently understand that it may produce an additional slow down in website performance (especially on mobile) or perhaps they feel that it will infringe on their privacy. What remains unclear is the extent of personalization. Is it product recommendations? Is it specific content? Is it tailoring the web experience in some other way? Do consumers even know when the experience is being personalized?

It's important to keep in mind, though, that the value of personalization to an organization and marketer is clear— better, more qualified leads. Our survey wasn't measuring that and although questions remain, it's clear that extensive personalization may not be the best place for organizations to invest.

Key Findings

Performance Is Key to a Great Web Experience

	1	2	3	4	Total	Average Rating
Fresh and updated content	**39%** 400	**29%** 295	**19%** 191	**13%** 127	1,013	2.04
Performance (streaming with no buffering, pages loading quickly, etc.	**52%** 523	**26%** 266	**9%** 87	**14%** 137	1,013	1.84
Consistent experience on mobile and desktop	**20%** 205	**27%** 274	**35%** 356	**17%** 177	1,012	2.50
Personalized content	**12%** 117	**18%** 182	**26%** 259	**44%** 447	1,005	3.03

Figure 1: Rank in order of importance what you expect from a website experience

Data from HTTP Archives has shown that between November 2010 and May 2013(1) websites doubled in size[2], a clear indication that they are becoming more complex and more interactive. And yet consumer expectations remain high as indicated by the survey results above (Figure 1), which depict the average rating (on a scale of 1="most important" to 4="least important") for what users find most important to their website experience. The results seem to point to a growing need for organizations to formulate and implement strategies to specifically improve the performance of their digital experiences.

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Key Findings

LESS THAN 1 SECOND
1.67% (17)

1-3 SECONDS
18.92% (192)

MORE THAN 5 SECONDS
40.79% (414)
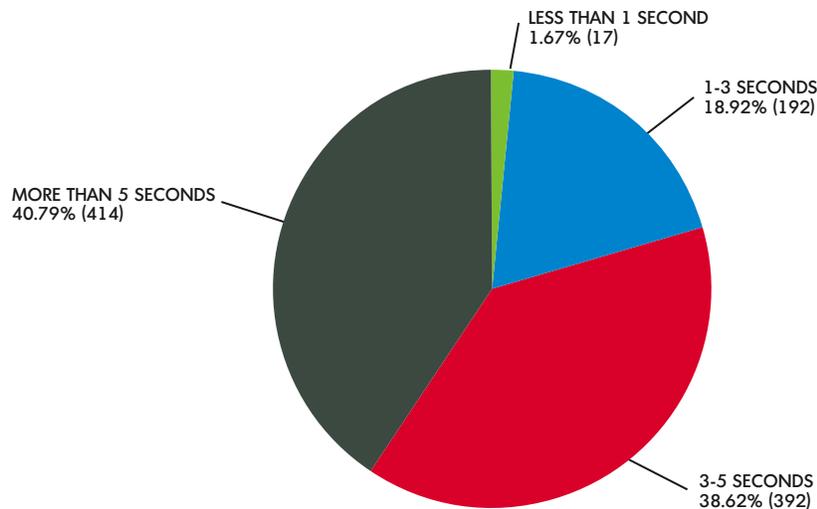
**3-5 SECONDS**
38.62% (392)

Figure 2: How long are you willing to wait for a website to load before you get frustrated and leave the site?

Consumers aren't willing to wait for websites to load (Figure 2) Whether it's one second, three seconds, or five seconds, survey results clearly indicate that patience is lacking This kind of intolerance for any delivery latency exacerbates the need for organizations to ensure the high performance of their website.
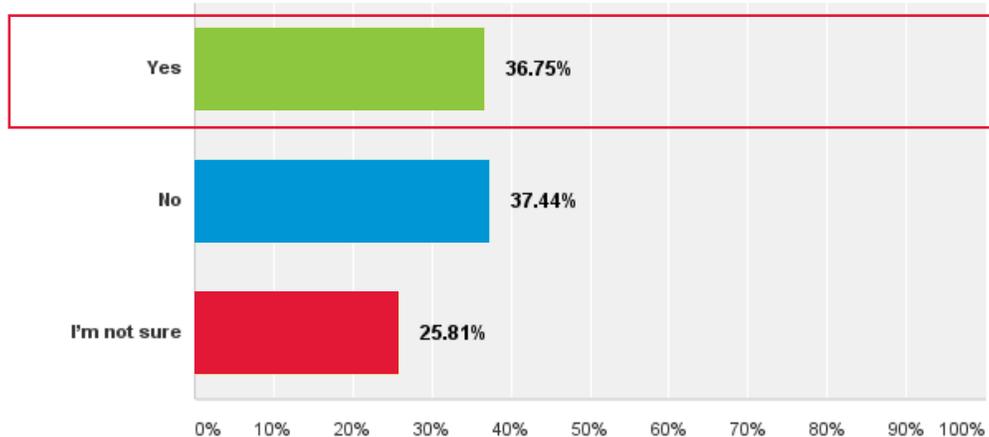
Figure 3: When you shop online, do you leave a page and buy the product from a competitor if you have to wait too long for the page to load?

Perhaps the most interesting indicator of consumer perception around performance is that almost 40% would leave to buy a product from a competitor if the web page takes too long to load (Figure 3) This points to a demonstrable business impact from poor performance

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Key Findings

I'm not sure
12% (121)

No
6% (60)

Yes
82% (834)
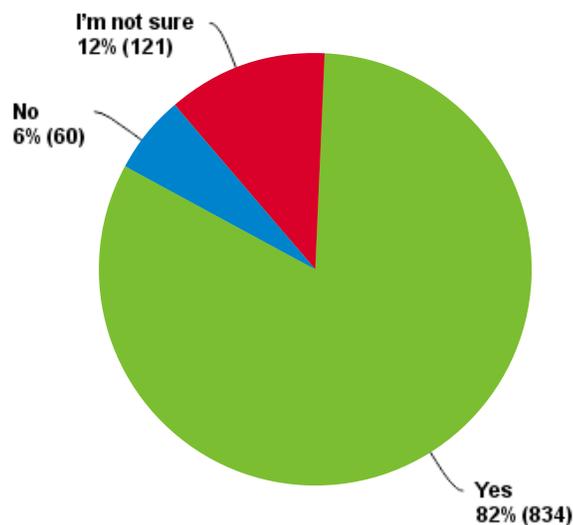
Figure 4: Are you likely to recommend a brand to a friend if you had
a positive experience with its website?

But poor performance isn't all doom and gloom On the opposite side of the spectrum, consumers are willing to share brands with friends and followers when they've had a positive experience with the website (Figure 4) Although a positive experience can mean a lot of things, it's safe to infer that part of that positivity results from a high performing website.

Consumer Web Use is Increasingly Mobile

| | 1 | 2 | 3 | 4 |
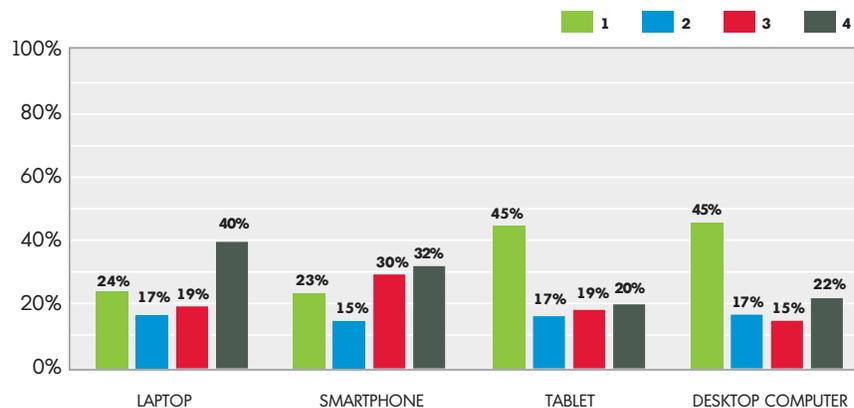
Figure 5: Which type of device do you use to access the website?

In Figure 5, respondents were asked to rate their usage (1="don't use at all to" 4="use most of the time") for each device It seems clear that Internet usage is shifting away from the desktop Consumers no longer want to be tied to a desk to browse the web but PC usage is still strong (indicated by the fact that laptops ranked the highest for using most of the time), perhaps underpinning that consumers find mobile devices (and mobile Internet access) still too unreliable for primary access.

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Key Findings
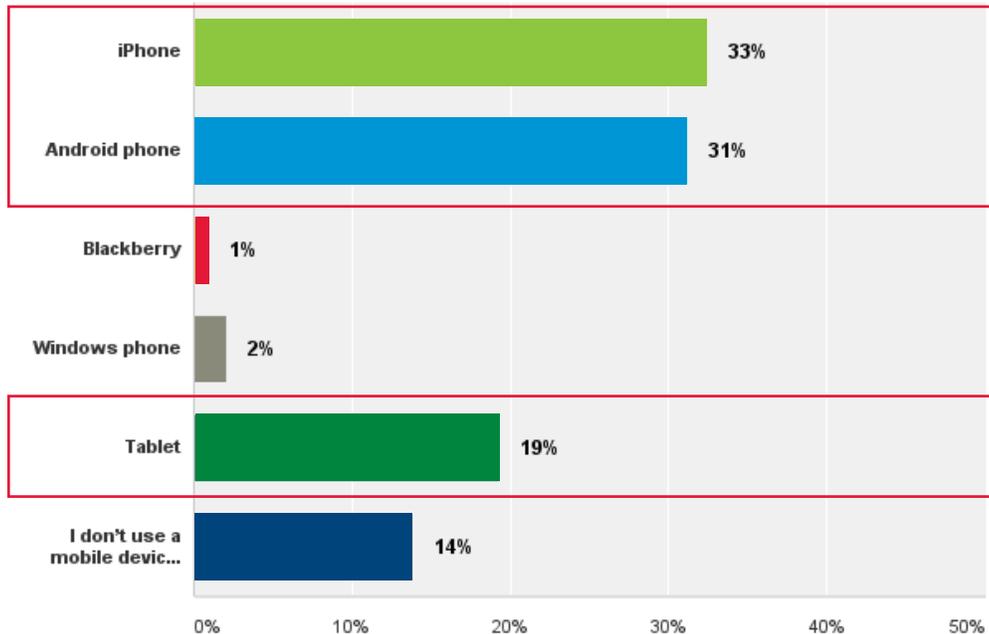
Figure 6: What kind of mobile device do you use most often to access the Internet?

Despite Apple's claim over the smartphone market, it's clear that they only hold a slight advantage over Android-based phones (Figure 6).
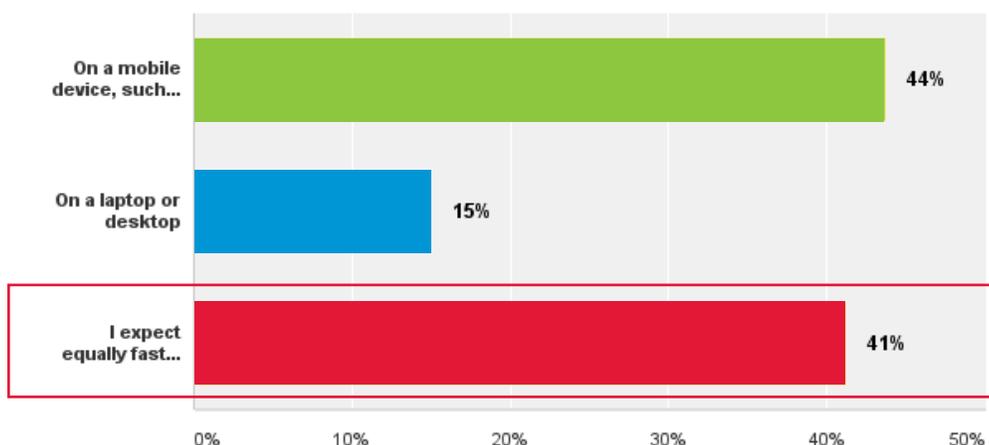

Figure 7: Are you willing to wait longer for a page to load...

Delivering high-performing websites to mobile devices is tricky and complicated There are simply more things with which to contend than delivering the same website experience to a PC And yet consumers are increasingly using smartphones and tablets for their Internet access with the expectation that the experience will be the same (Figure 7).

Key Findings

The Value of Web Experience Personalization Remains to be Seen
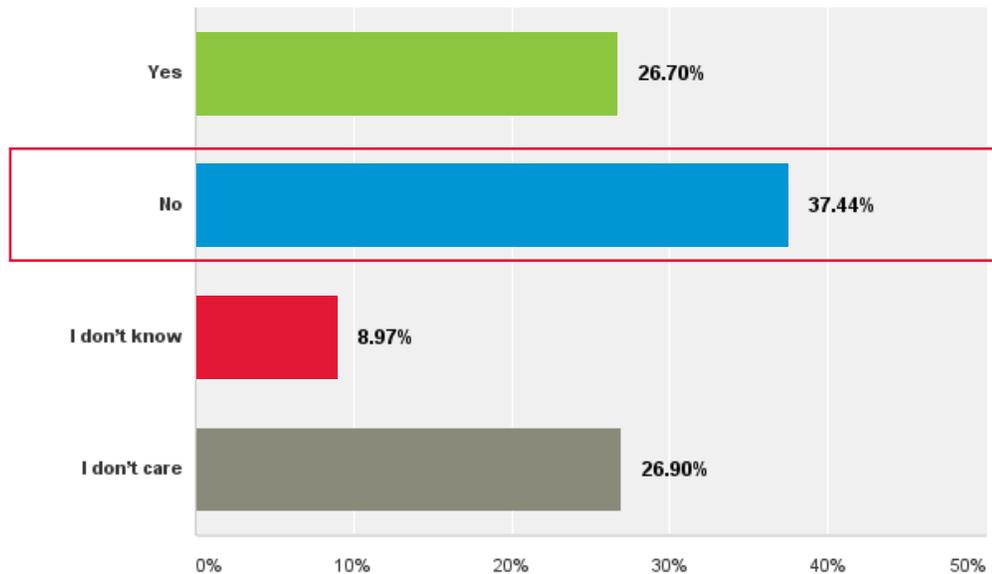

Figure 8: Do you want a website to remember that you've come there before, and make recommendations based on your previous visits?

Despite the push by organizations and marketers to personalize the web experience, consumers don't seem to want websites to know anything about them (Figure 8) This could be a result of recent high-profile data breaches or just a general feeling of distrust (exacerbated by the recent Facebook admission of data experimentation)
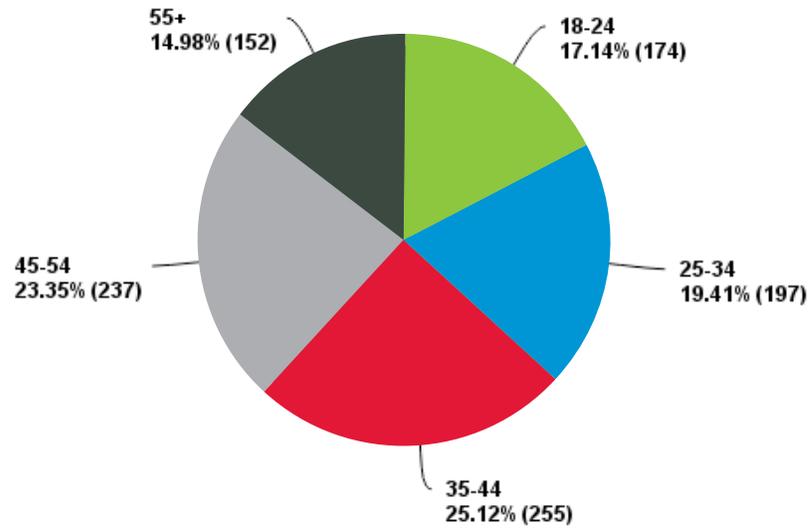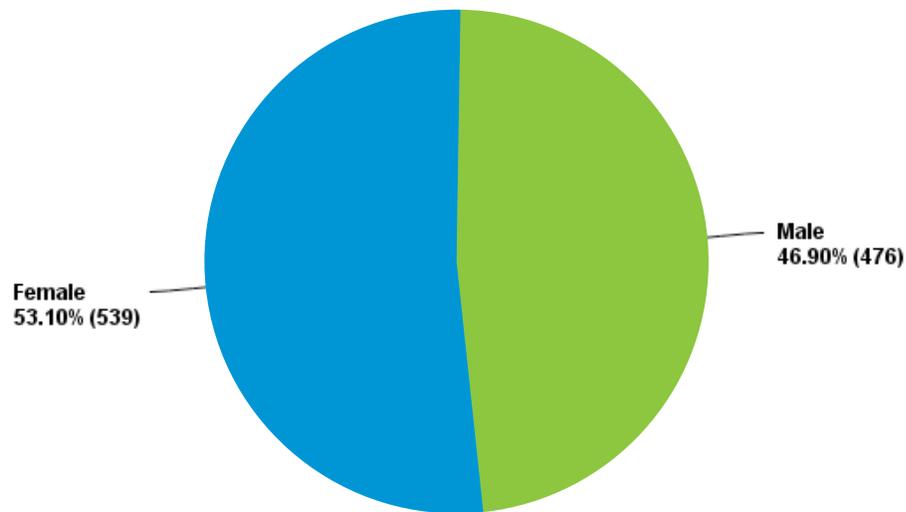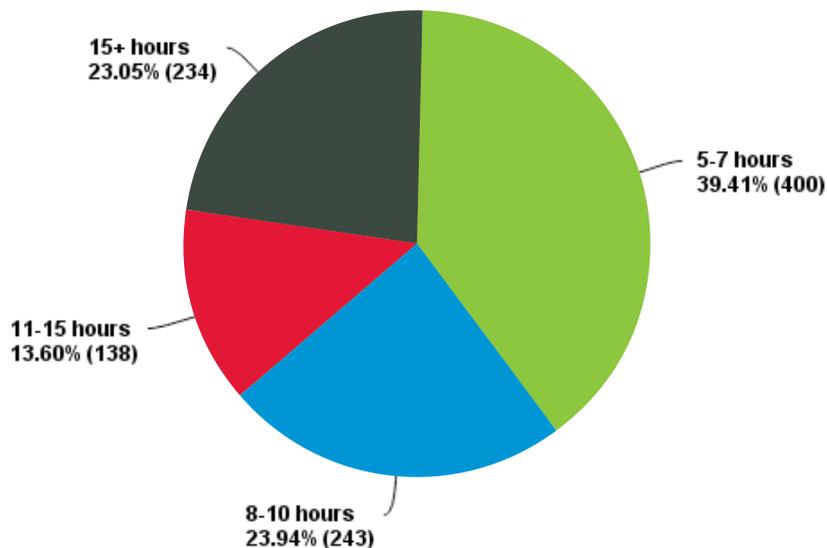
Appendix

Figure 11: How much actual time do you spend online each week, outside of work?
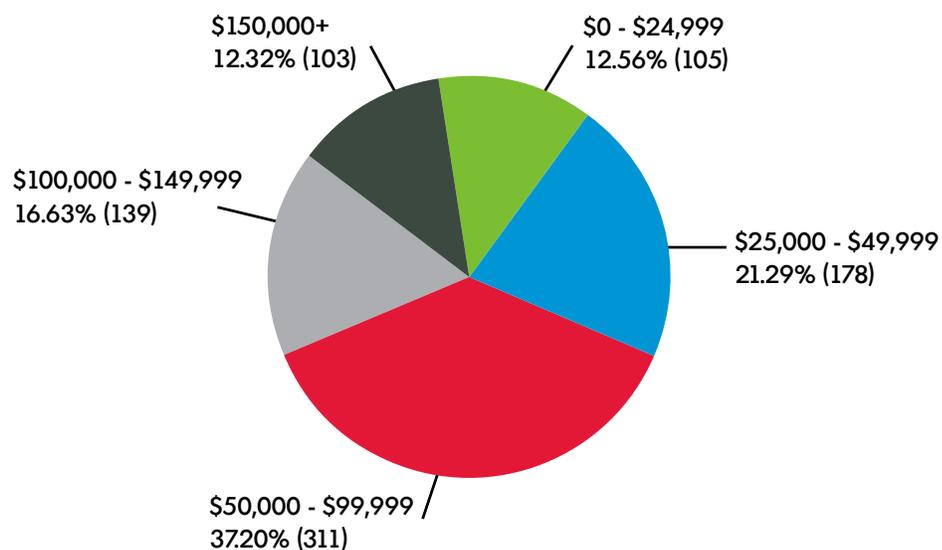
Figure 12: Household income

## Appendix

Less than high school degree
1.39% (14)

Graduate degree
23.21% (234)

High school degree
10.32% (104)

Some college or
Associate degree
29.66% (299)

Bachelor degree
35.42% (357)

Figure 13: Education

New England
6.05% (61)

Pacific
16.47% (166)

Middle Atlantic
14.48% (146)

Mountain
7.34% (74)

West South Central
8.73% (88)

East North Central
18.55% (187)

East South Central
3.97% (40)

South Atlantic
16.47% (166)

West North Central
7.94% (80)
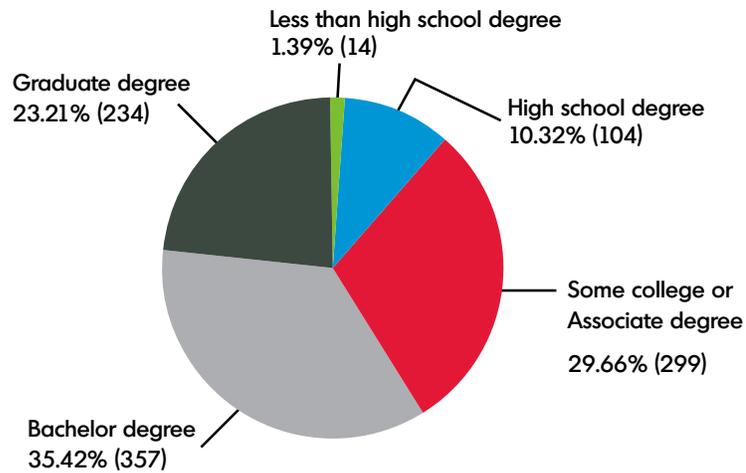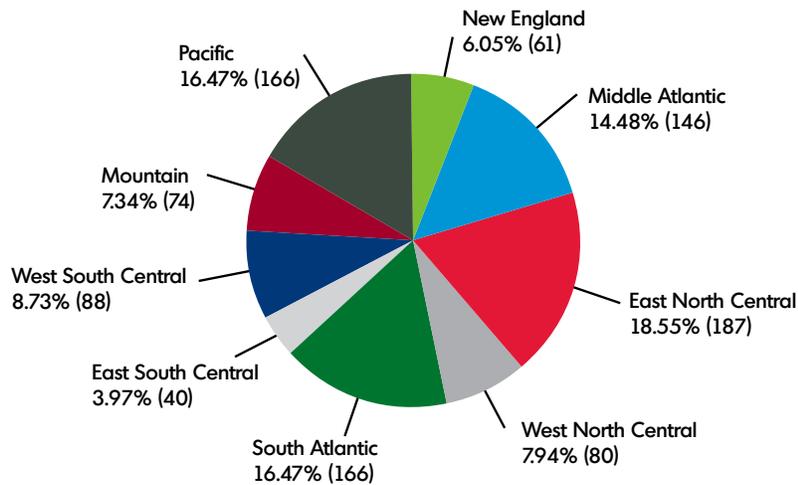
Figure 14: Location (Census region)

[1] We equate "positive experience" with one that satisfies consumer needs and expectations, one of which is a high-performing website.

[2] http://www.webperformancetoday.com/2013/06/05/web-page-growth-2010-2013/

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