The second annual *The State of the User Experience* is Limelight Networks’ latest in a series of surveys that explore consumer perceptions and behaviors around digital content.

This report is based on responses Limelight Networks received in July 2015 from 1,302 consumers located in the United States, United Kingdom, Canada, and Singapore ranging in demographics, gender, and education.
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What’s Changed from 2014?

We conducted this survey for the first time in 2014 and uncovered interesting findings:

- Consumer web usage is increasingly mobile.
- The value of web experience personalization remains to be seen.
- Performance is key to a great web experience.

In just one year, things have definitely changed. Key findings from this year’s survey include:

- Dramatic surge in time spent online with Baby Boomers, not Millennials, leading the way.
- Social networking is rapidly becoming the most popular online activity, beating out reading news.
- For Millennials, video is the most important aspect of their online experience.
- Performance is still key to a great web experience, but patience is growing.
- Consumers want a more personalized Web experience.
- Consumers expect more performance from the mobile Web.

Dramatic Surge in Time Spent Online

Intuitively, we know that people are spending more time online. But how much more time? In 2014, we reported that 23% of respondents spent more than 15 hours per week online outside of work (Figure 1). That number increased dramatically in 2015 with 45% indicating they spend more than 15 hours per week online outside of work (Figure 2).

What is even more interesting, though, is when we split our 2015 data along demographic lines—where we might expect that Millennials are spending the most time connected (41% spending 15+ hours), it is actually the Baby Boomers (51% spending 15+ hours) leading the way.
Social Networking is Rapidly Becoming the Most Popular Online Activity

In 2014, we asked respondents about their time online by requiring them to rate online activities in terms of how much time they spent performing them (with 1 being “little time” and 5 being “a lot of time”). The results clearly showed that users had a very diversified attention span with “reading news” eking out a narrow margin of victory (Figure 3).

In 2015, though, we decided to ask this question in a slightly different manner. Instead of letting respondents rate activities, we asked them to rank them according to how much time they spent on each activity with “1” representing the activity on which they spent the least amount of time and “7” the activity on which they spent the most time. The results painted a much different picture (Figure 4):

When we asked respondents which activity they spent the most time on, “on social media sites” ranked first, with “reading news content” coming in second and “watching video content” following close by in third. It is apparent from the 2015 findings that there is a clear distinction in user activities while spending time online. It is not surprising then to see “watching live video (sports)” coming in last given that there is limited live sporting event content available online. However, between commerce and content, there is no question as to the winner—users spend more time consuming content online than they do shopping.
For Millennials, Online is Becoming All About Video

Perhaps equally interesting is that when the 2015 online activity data is filtered by Millennials, the rank of “watching video online” grew tremendously, rivaling social media activity for the top spot. For Millennials, then, it’s clear that time spent online isn’t just about social networking.

Performance is Still Key to a Great Web Experience, but Patience is Growing

From our 2014 survey, we reported that website performance is a key to successful digital experiences (Figure 7). The majority of the respondents (52%) had indicated that a high-performing website was the most important expectation for a digital experience.

The results of our 2015 survey reinforce those findings (Figure 8).

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>Total</th>
<th>Weighted Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh and updated content</td>
<td>39%</td>
<td>29%</td>
<td>19%</td>
<td>13%</td>
<td>1,013</td>
<td>2.04</td>
</tr>
<tr>
<td>Performance (streaming with no buffering, pages loading quickly, etc.)</td>
<td>52%</td>
<td>26%</td>
<td>9%</td>
<td>14%</td>
<td>1,013</td>
<td>1.84</td>
</tr>
<tr>
<td>Consistent experience on mobile and desktop</td>
<td>20%</td>
<td>27%</td>
<td>35%</td>
<td>17%</td>
<td>1,012</td>
<td>2.50</td>
</tr>
<tr>
<td>Personalized content</td>
<td>12%</td>
<td>18%</td>
<td>26%</td>
<td>44%</td>
<td>1,005</td>
<td>3.03</td>
</tr>
</tbody>
</table>
However, perhaps more surprising is the fact that consumers are appearing to develop much more patience for slow web experiences. For example, in 2014, 41% of users reported that they would wait longer than 5 seconds for a website to load (Figure 9). In 2015, that percentage increased to 52% (Figure 10).

What’s important is that how long a user will wait for a website to load has a measurable impact on an organization’s brand. In 2014, 37% of respondents indicated that they would leave a website to buy a product from a competitor if that website failed to load quickly (Figure 11). Yet in 2015, we saw that number decrease to 34% (Figure 12), perhaps indicating that consumer impatience might not have as much of a negative impact on brand reputation as it has in the past. However, even though consumers’ patience may be rising, approximately 4 out of 10 would still leave a page to buy a product from a competitor if they have to wait too long for the page to load, highlighting the continued importance of maintaining a high-performing website.

Figure 9: How long are you willing to wait for a website to load before you get frustrated or leave the site? (Everyone, 2014)

Figure 10: How long are you willing to wait for a website to load before you get frustrated or leave the site? (Everyone, 2015)

Figure 11: 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? (Everyone, 2014)

Figure 12: 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? (Everyone, 2015)
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In addition, although less of a difference, when asked if consumers would give a website another try in the future (if the website loaded slowly today), more consumers are indicating that they would.

Users Want a More Personalized Web Experience

In 2014, we wrote that “the value of web experience personalization remains to be seen” as only 27% indicated that they wanted a website to remember them from a previous visit (Figure 15). In 2015, though, the feeling has dramatically changed to 43% (Figure 16).

Not only did the number of respondents answering “no” decrease (from 37% to 25%) and the number of respondents answering “yes” increase (from 27% to 43%), but the number of respondents answering “I don’t care” also decreased (from 27% to 21%) indicating that consumers are clearly forming more of a positive opinion about website personalization.
Users Expect More from the Mobile Web

It’s clear that across the globe, mobile Web usage is on the rise. According to venture capital firm Kleiner Perkins Caufield Byers (KPCB), it has actually surpassed desktop Web usage\(^1\).

In our 2014 report, we asked respondents if they would wait longer for a website to load on a mobile device or desktop. The results (Figure 17) show that consumers expected a website to operate faster on their desktop than on a mobile, perhaps a result of the growing adoption of broadband Internet access.

![Figure 17: Percent willing to wait longer for a page to load (Everyone, 2014)]

But in 2015, the results are startlingly different (Figure 18).

![Figure 18: Percent willing to wait longer for a page to load (Everyone, 2015)]

Only 35% of respondents are willing to wait longer for a webpage to load on a mobile device (as compared to 44% in 2014) while 26% would wait longer for a webpage to load on their desktop computer (as compared to 15% in 2014). The flip-flop between 2014 and 2015 clearly indicates that performance for the mobile Web has become top-of-mind for consumers.
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**Conclusion**

Consumers expect more from their online experiences. Whether it’s personalized content or faster performance, they are clearly voicing an opinion throughout the data that the experience matters, especially when it comes to purchasing a product. This should be a call-to-action for brands. To an increasingly discerning user in a more demanding digital world, it’s ever more important to ensure that online experiences, whether they happen on a small or large screen, meet these rising expectations.
Appendix—Demographics

Respondent Age

How old are you?

- Millennials
  18-33

- Generation X
  34-50

- Baby Boomer
  51-69

Respondent Income Bracket

What is your average annual income?

- Less than $35,000
- $35,001 to $75,000
- $75,001 to $100,000
- $100,001 to $135,000
- $135,001 to $175,000
- Greater than $175,001
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Highest Level of Education

What is your highest level of education?

- High school
- Community college
- Undergraduate University
- Graduate school

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