The State of the User Experience is part of Limelight Networks’ series of annual surveys that explore consumer perceptions and behaviors around online activities.
# The State of the User Experience

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Overview

This research report takes a close look at trends in how U.S. consumers behave online. It revisits questions we asked one year ago. Key findings include:

- People are spending slightly less time online, as compared to a year ago
- Consuming news content leads the way for online activities, followed closely by social media
- Smartphones dominate as the device to access online content
- Patience for slow websites is waning
- Consumers expect high-performing web experiences across all devices
- Website performance has a demonstrable impact on e-commerce sales
- Consumers are less forgiving about poor-performing websites
- A positive web experience can translate to word-of-mouth referrals
- Consumers employ social media for a variety of activities while shopping online

In this 2016 report, we have provided a special "Millennials section" exploring behaviors and perceptions specific to that demographic:

- Millennials are not spending as much time online as Boomers
- For Millennials, being online is mostly about watching video and social media
- Millennials are the most apt to use smartphones to access online content
- Millennials are more patient and willing to wait longer for poorly-performing websites
- For Millennials, slow websites don’t have as much of an impact on the shopping experience
- More often, Millennials want a personalized web experience
- When shopping online, Millennials often employ social media (especially to find out what their friends think)

To help companies apply the insights from this report, we have included a section detailing strategies to provide viewers with a better digital experience:

- Optimize website performance
- Integrate social media into the shopping experience
- Focus on mobile experiences
Executive Summary

It seems that everything is moving online—from shopping to watching video—yet it appears consumers are bucking that trend in terms of where they’re spending time. According to our survey data, from 2015 to 2016, there was a considerable drop in the time spent online. But that doesn’t mean people aren’t engaging in online activities. In fact, perhaps equally as interesting as the drop in time spent online, is what’s becoming the most important online pastime—reading news. Given the current political and social climate in both the U.S. and abroad, it’s not surprising that people are looking online to find instant answers to charged topics.

Notably, the dominant device for online access shifted from the laptop to the smartphone in the past year. This implies people are using more applications and the mobile web to carry out the various activities that have been tracked in our study—social networking, online shopping, watching videos, researching products, and more—which coincides with Cisco’s Visual Network Index Report predictions about the growth of the mobile web.

Consumers are still hypersensitive to performance. They want fast online experiences and are becoming less patient for slow-loading websites and applications. When online activities slow down, it has a demonstrable impact on the bottom line—consumers are less likely to recommend brands or revisit websites to purchase.

Millennials, for the most part, aren’t much different than their demographic counterparts. They want fast websites (although they show slightly more patience with slow-loading web experiences), use their smartphones to access online activities, and heavily favor social media. The most significant difference is in how much time they spend online.
Key Findings

People Are Spending Slightly Less Time Online, as Compared to a Year Ago

Contrary to what was discovered in 2015, people are spending less time online in 2016 (figures 1 and 2).

As indicated in the figures above, there was a large redistribution of time from 2015 during which nearly half (46 percent) of consumers spent more than 15 hours online each week. That amount fell by nearly 20 percentage points in 2016 to 28 percent. At the same time, the number of consumers who spend 5-7 hours online each week nearly doubled (30 percent in 2016 as compared to 17 percent in 2015).
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Consuming News Content Leads the Way for Online Activities, Followed Closely by Social Media

In 2015, online activity centered on social media (Figure 3). However, in 2016 consumer behavior has shifted to news content (Figure 4).

Given the current political and social unrest in the U.S., it seems logical that people are using their time online (especially from their smartphones, as we will discuss later) to understand and keep track of those issues. Given how close social media was as the second most popular online activity, it’s possible that consumers are employing social networks as their primary sources of news content.
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Smartphones Dominate as the Device to Access Online Content

In 2015, the laptop computer was the dominant device by which to access online content (Figure 5) for U.S. consumers. In 2016 that has changed dramatically (Figure 6).

This data coincides with what Cisco reports in its Visual Network Index Report⁴—that mobile usage around the world is skyrocketing and more people are using mobile devices to engage with websites and the internet.

Patience for Slow Websites Is Waning

Even as consumers enjoy faster broadband speeds in the U.S.⁵ they are becoming hypersensitive to slow-performing websites.

Figures 7 and 8, show the number of consumers who would wait longer than 5 seconds for a website to load has shrunk from 51 percent to 44 percent. This indicates that consumer patience for poor-performing websites is dwindling.
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Consumers Expect High-Performing Web Experiences Across All Devices

Coinciding with consumer sensitivity around website performance as well as the surge in smartphone usage, people are increasingly expecting high-performing web experiences across all of their devices.

Figures 9 and 10 show a dramatic increase in the number of consumers who expect equally fast performance on a computer as well as a mobile device (38 percent in 2015 compared to 50 percent in 2016). This may be a result of mobile carriers investing heavily in cell coverage and density resulting in more stable, consistent, and faster mobile connections.

Consumer insistence on high-performance web experiences is further illustrated in Figures 11 and 12.

As the figures above illustrate, website performance is not only top-of-mind but it’s becoming even more important. Although in 2015, performance was the highest expectation (Figure 11), it has grown considerably in 2016 (Figure 12)—1.91 compared to 1.58, an approximate 20 percent increase. It’s possible that growing broadband speeds (both for fixed and wireless networks) as well as a growing demand for quality content are helping to drive consumer expectations around performance.
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Website Performance Has a Demonstrable Impact on E-commerce Sales

As indicated in Figures 13 and 14, consumers are more apt to abandon a poorly-performing website and buy a product from a competitor and 49 percent said “no, they wouldn’t” in 2015 compared to only 36 percent indicating the same in 2016. As e-commerce has matured, with more competitors entering the market every day, it is increasingly imperative that sites perform well. Failing to do so can spell disaster for sales as consumers leave and don’t return to make purchases.

Consumers Are Less Forgiving About Poor-Performing Websites

As would be expected by the shift in consumer attitudes revealed in Figures 15 and 16, they are generally less forgiving about poor-performing websites.

In 2015 (Figure 15), almost 73 percent of consumers responded that they would give a website another chance. This number declined to less than 68 percent in 2016 (Figure 16) indicating a growing impatience when websites don’t load or perform quickly.
Consumers Want Less Website Personalization

As seen in Figure 12, personalized content is the lowest priority for consumers when evaluating a web experience. That is further borne out in the graphs below.

As indicated in Figures 17 and 18, between 2015 and 2016, consumer desire for websites remembering them (and offering personalized content) has significantly dropped (from 43 percent to 31 percent). This isn’t surprising in the U.S. given the preference towards privacy.

A Positive Web Experience Can Translate to Word-of-Mouth Referrals

When it all comes down to it, the benefits of a good web experience can have a positive, measurable impact on the business. Consumers are more willing to recommend a brand to friends and family with which they’ve had a favorable web experience over a brand that provides a poor web experience.

As Figures 19 and 20 illustrate, the majority of consumers are willing to recommend a brand based on a positive experience with its website. This trend is changing slightly—fewer consumers (79 percent compared with 83 percent) were willing to make this recommendation in 2016.
Consumers Employ Social Media For a Variety of Activities While Shopping Online

This year we added a new question to determine how consumers employ social media while shopping online.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Agree (%)</th>
<th>Sometimes (%)</th>
<th>Never (%)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find product-related information</td>
<td>15.96%</td>
<td>46.66%</td>
<td>37.38%</td>
<td>1,078</td>
</tr>
<tr>
<td>Engage with a company’s customer service to get help buying the product,</td>
<td>6.03%</td>
<td>42.58%</td>
<td>51.39%</td>
<td>1,078</td>
</tr>
<tr>
<td>for pricing, etc.</td>
<td>65</td>
<td>459</td>
<td>554</td>
<td></td>
</tr>
<tr>
<td>Find out what my friends, family, and other social connections think</td>
<td>10.02%</td>
<td>44.25%</td>
<td>45.73%</td>
<td>1,078</td>
</tr>
<tr>
<td>about a product</td>
<td>108</td>
<td>477</td>
<td>493</td>
<td></td>
</tr>
<tr>
<td>Look for online coupons</td>
<td>20.32%</td>
<td>46.01%</td>
<td>33.67%</td>
<td>1,078</td>
</tr>
<tr>
<td>Post pictures and videos of products</td>
<td>6.86%</td>
<td>32.37%</td>
<td>60.76%</td>
<td>1,078</td>
</tr>
<tr>
<td></td>
<td>74</td>
<td>349</td>
<td>655</td>
<td></td>
</tr>
</tbody>
</table>

Figure 21: How do you use social media while shopping online? (Everyone, 2016)

In this question, we asked how often they performed each social activity while shopping online. As indicated in Figure 21, the majority of respondents (66 percent) use social media to search for online coupons followed closely by finding product-related information (63 percent). However, most consumers (60 percent) do not post pictures and videos of products nor engage with a brand’s representatives (51 percent).
Millennials Section

- Millennials are not spending as much time online as Boomers
- For Millennials, being online is mostly about watching video and social media
- Millennials are the most apt to use smartphones to access online content
- Millennials are more patient and willing to wait longer for poorly-performing websites
- For Millennials, slow websites don’t have as much of an impact on the shopping experience
- More often, Millennials want a personalized web experience
- When shopping online, Millennials often employ social media (especially to find out what their friends think)
Millennials Are Not Spending As Much Time Online as Boomers

You might expect younger demographics who have grown up with the internet, to spend more time online. Yet that is not necessarily the case.

As can be seen in Figures 22 through 24, Baby Boomers spend a greater amount of time online, with 31 percent online for more than 15 hours per week (as compared to 27 percent for Millennials and 24 percent for Gen X). Is this surprising? Probably not when you consider that Boomers have the most disposable time (with many of them closer to, or actually in, retirement) and most likely see the internet as a way to stay connected with friends and family. This bears out in the online activities most popular with Boomers—as Figure 25 below illustrates. Reading news is the most popular amongst Boomers, while social media ranks second.

**Figure 22: How much time do you spend online each week, outside of work? (Millennials, 2016)**

**Figure 23: How much time do you spend online each week, outside of work? (Gen X, 2016)**

**Figure 24: How much time do you spend online each week, outside of work? (Baby Boomers, 2016)**

**Figure 25: How do you spend the majority of your time online?**

Please rank in importance with one being the least and 10 being the most. (Baby Boomers, 2016)
For Millennials, Being Online Is Mostly about Watching Video and Social Media

As we uncovered in Figure 4, the majority of consumers are now spending their time online reading news content while social media comes in a close second. That is not the case for Millennials.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Score (Everyone Else, 2016)</th>
<th>Score (Millennials, 2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching video content</td>
<td>4.12</td>
<td>4.82</td>
</tr>
<tr>
<td>Reading news content</td>
<td>5.36</td>
<td>4.52</td>
</tr>
<tr>
<td>Watching live video (sports)</td>
<td>2.67</td>
<td>2.78</td>
</tr>
<tr>
<td>Shopping on e-commerce sites</td>
<td>4.05</td>
<td>3.71</td>
</tr>
<tr>
<td>Researching products</td>
<td>4.36</td>
<td>3.97</td>
</tr>
<tr>
<td>On social media sites</td>
<td>4.80</td>
<td>5.35</td>
</tr>
<tr>
<td>On gaming sites</td>
<td>2.63</td>
<td>2.86</td>
</tr>
</tbody>
</table>

As indicated in Figures 26 and 27, Gen X and Baby Boomers are the most likely to spend their time online reading news content. However, Millennials are mostly using social media and watching online video. If our original premise is correct—that reading news online is a by-product of a politically charged environment—then the results illustrated in Figure 27 could indicate a general Millennial apathy towards politics. However, Millennials could simply be consuming their news (which ranks third in online activities) through video or social media.
Millennials Are the Most Apt to Use Smartphones to Access Online Content

Millennials grew up with not only internet access, but with mobile devices as well. They were privy to the explosive growth of the mobile phone and the birth of the smartphone (1992). It comes as no surprise that they lead the charge for using mobile phones as their primary means of internet access.

As demonstrated in Figures 28 and 29, while the majority of consumers use their smartphones more often to access the internet, Millennials do so by a wider margin (4.30 for smartphones compared with 3.62 for laptops).
Millennials Are More Patient and Willing to Wait Longer for Poorly-Performing Websites

Millennials are considerably more patient towards online experiences. They grew up accessing the web, streaming online video and playing games. They are more familiar with the technologies. It’s similar to Baby Boomers being more accepting of interruptions in their broadcast television because they grew up with static and rabbit ears.

As we can see in Figures 30 and 31, Millennials are the most willing to wait more than 5 seconds for a page to load. Perhaps this is a result of their natural inclination to utilize multiple screens—they might engage with a smartphone for social media, for example, while a web page loads on a laptop.

For Millennials, Slow Websites Don’t Have as Much of an Impact on the Shopping Experience

Going along with their increased patience with slow-loading websites, Millennials are also far more likely to try a website again in light of a bad experience.

As Figure 33 indicates, Millennials are 15 percentage points more likely to give a website another chance when it performs poorly. Again, this might point to the fact that Millennials are generally more forgiving about web-based technologies and experiences.
More Often, Millennials Want a Personalized Web Experience

Many web experiences today are pushing towards personalization\(^1\). Does that mean that consumers want a website to remember they have been there before or to recommend products, services, or content? That is where Millennials differ.

As illustrated in Figures 34 and 35, Millennials are the most apt to want a personalized web experience (33 percent as compared to 30 percent indicating “yes” and 27 percent compared to 37 percent indicating “no”).

As illustrated in Figures 36 and 37, which show a minor, albeit marked, difference between the importance of personalized content to Millennials versus everyone else.

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\(^1\) Limelight Networks, “The State of the User Experience”

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**Figure 34:** Do you want a website to remember that you have come there before, and make recommendations based on your previous visit? (Everyone Else, 2016)

**Figure 35:** Do you want a website to remember that you have come there before, and make recommendations based on your previous visit? (Millennials, 2016)

**Figure 36:** Please rate each item in terms of importance (1 being most important) of what you expect from a website experience. (Everyone Else, 2016)

**Figure 37:** Please rate each item in terms of importance (1 being most important) of what you expect from a website experience. (Millennials, 2016)
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When Shopping Online, Millennials More Often Employ Social Media (Especially to Find out What Their Friends Think)

Social media is becoming an active element in the buying process. More consumers are employing it for a variety of reasons as uncovered in Figure 21. How are Millennials using it specifically?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Agree</th>
<th>Sometimes</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find product-related information</td>
<td>14.81%</td>
<td>45.71%</td>
<td>39.48%</td>
</tr>
<tr>
<td>Engage with a company’s customer service to get help buying the product, for pricing, etc.</td>
<td>5.19%</td>
<td>43.90%</td>
<td>50.91%</td>
</tr>
<tr>
<td>Find out what my friends, family, and other social connections think about a product</td>
<td>7.92%</td>
<td>42.86%</td>
<td>49.22%</td>
</tr>
<tr>
<td>Look for online coupons</td>
<td>19.35%</td>
<td>44.29%</td>
<td>36.36%</td>
</tr>
<tr>
<td>Post pictures and videos of products</td>
<td>5.58%</td>
<td>29.61%</td>
<td>64.81%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity</th>
<th>Agree</th>
<th>Sometimes</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find product-related information</td>
<td>18.83%</td>
<td>49.03%</td>
<td>32.14%</td>
</tr>
<tr>
<td>Engage with a company’s customer service to get help buying the product, for pricing, etc.</td>
<td>8.12%</td>
<td>39.29%</td>
<td>52.60%</td>
</tr>
<tr>
<td>Find out what my friends, family, and other social connections think about a product</td>
<td>15.26%</td>
<td>47.73%</td>
<td>37.01%</td>
</tr>
<tr>
<td>Look for online coupons</td>
<td>22.73%</td>
<td>50.32%</td>
<td>26.95%</td>
</tr>
<tr>
<td>Post pictures and videos of products</td>
<td>10.06%</td>
<td>39.29%</td>
<td>50.65%</td>
</tr>
</tbody>
</table>

**Figure 38**: How do you use social media when shopping online? (Everyone Else, 2016)

**Figure 39**: How do you use social media when shopping online? (Millennials, 2016)

As illustrated in Figures 38 and 39, Millennials are using social media more often (comparing the “Always” columns between the two figures) across the board. It is especially prevalent in the activity to “find out what my friends, family, and other social connections think about a product.” In that category, Millennial respondents are almost twice as likely to do so compared to everyone else (15.6 percent versus 8 percent). It is clear from these findings that Millennials see social media as a means of engagement during the online shopping experience process.
Conclusion

- Optimize website performance
- Integrate social media into the online shopping experience
- Focus on mobile experiences

Optimize Website Performance
The single most impactful action companies can take is to ensure they are providing the best possible web experience. In most cases this involves employing a Content Delivery Network (CDN) to deliver content (webpages, online video, etc.) closer to the end-user. And although Millennials showed a greater penchant for patience than their demographic counterparts, many consumers will still abandon a website experience and may not recommend it to a friend if it performs poorly.

Integrate Social Media into the Online Shopping Experience
As indicated in Figures 21, 38, and 39, social media plays an important part in the shopping experience for all demographics. As such, it’s critical that organizations integrate social networking into their shopping process, aiding in product research, purchasing, engagement with social network connections, and customer service, rather than having separate e-commerce and social experiences.

Focus on Mobile Experiences
It’s clear across the board that smartphones are the preferred device for accessing the internet. Because of this, organizations need to design online web experiences with mobile in mind. It is vital to ensure that websites including video content load quickly, render well, and perform optimally on mobile devices.
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Footnotes

1 Note: the comparison we make between the 2016 survey and the 2015 survey for these key findings is based on U.S. responses only
2 We define Millennials as those aged 18-35
5 U.S. broadband speeds have tripled over the past 3.5 years according to the FCC. http://bgr.com/2016/01/02/us-internet-speeds-average/
6 In 2015, U.S. e-commerce grew 14.6%. https://www.internetretailer.com/2016/02/17/us-e-commerce-grows-14-6-
7 "A 2-second delay in load time during a transaction results in abandonment rates of up to 87%. This is significantly higher than the average abandonment rate of 70%" https://blog.radware.com/application-delivery/application-acceleration-optimization/2014/01/55-web-performance-stats-youll-want-to-know/
9 According to the Pew Research Center, Millennials, "continue to have the lowest voter turnout of any age group. Only about 46 percent voted in the last presidential election..." (http://www.npr.org/2016/05/16/478237882/millennials-now-rival-boomers-as-a-political-force-but-will-they-actually-vote)
10 https://www.statista.com/topics/2531/second-screen-usage/
11 http://www.forbes.com/sites/forbesinsights/2016/02/11/how-marketers-are-driving-growth-through-personalized-content#17e3521e28cc
Appendix—Demographics

Age

<table>
<thead>
<tr>
<th>Generation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials</td>
<td>28.57%</td>
</tr>
<tr>
<td>Generation X</td>
<td>33.21%</td>
</tr>
<tr>
<td>Baby Boomer</td>
<td>38.22%</td>
</tr>
</tbody>
</table>

![Figure 40: How old are you? (Everyone, 2016)](image)

Level of Education

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>High school</td>
<td>14.29%</td>
</tr>
<tr>
<td>Community college</td>
<td>19.42%</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>38.10%</td>
</tr>
<tr>
<td>University</td>
<td>28.20%</td>
</tr>
</tbody>
</table>

![Figure 41: What is your highest level of education? (Everyone, 2016)](image)
Appendix—Demographics

Gender

Figure 42: What is your gender? (Everyone, 2016)
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Methodology
This survey was fielded by a third-party company with access to domestic U.S. respondents through consumer panels. The survey includes respondents in the U.S. Based on the sample size, the confidence interval is approximately 2.8 with a 95 percent confidence level or 3.7 with a 99 percent confidence level.

About Limelight Networks
Limelight Networks Inc., (NASDAQ: LLNW), a global leader in digital content delivery, empowers customers to better engage online audiences by enabling them to securely manage and globally deliver digital content, on any device. The company’s award winning Limelight Orchestrate™ platform includes an integrated suite of content delivery technology and services that helps organizations secure digital content, deliver exceptional multi-screen experiences, improve brand awareness, drive revenue, and enhance customer relationships — all while reducing costs. For more information, please visit www.limelight.com, read our blog, follow us on Twitter, Facebook and LinkedIn and be sure to visit Limelight Connect.