

EXECUTIVE REPORT
JULY 2017

DIGITAL DESERTION

The Rise of Consumer
Expectations on
Website and Application
Performance and the
Impact of Negative
Digital Experiences

APICASYSTEMS.COM



EXECUTIVE SUMMARY

Apica, the global performance monitoring and testing solutions provider, conducted a survey with global research agency 3Gem among web and app users in the US, UK and Sweden, to explore their expectations and experiences, and what impacts their opinion of brands.

Overall, the themes to emerge showed that today's online users expect a greater level of performance than they did three years ago; that digital disappointment will drive them to turn to competitors' offerings, and that brands will be further impacted as consumers are likely to tell friends and colleagues about unsatisfactory online experiences.

Data was generally consistent across the geographies, with some nuances. In general, those in Sweden are slightly less forgiving when it comes to slow webpage or app loading times, and those in the US are a little more patient.

However, most agree that they find slow webpage loading a source of frustration. As many as one third agree that the impact is significant, and leads them to abandon sites quickly. Users expect webpages and apps to load faster than they did three years ago—three quarters of respondents have this expectation, in all three markets.

Brands can be negatively impacted by poor web or app performance. Nearly two thirds of UK and US users say that poor web or app performance affects their brand loyalty, and in Sweden this rises to almost three quarters.

Users are likely to mention poor website or app performance to friends or colleagues, and those in Sweden are the most likely to do so.

Over half of users believe that several hours of planned downtime during scheduled maintenance were unacceptable—these users have an 'upper limit' of one hour. One in ten users now expects 100% uptime.

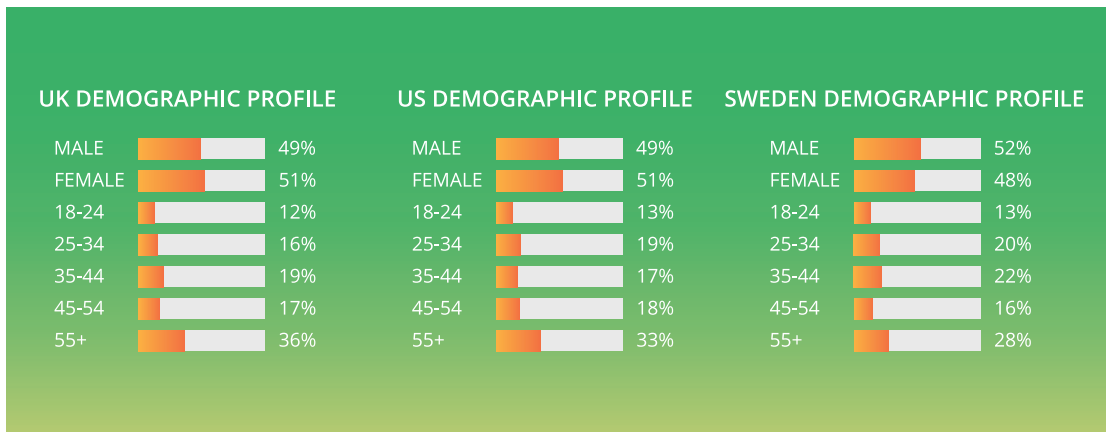


BACKGROUND AND METHODOLOGY

- Apica commissioned global research agency 3Gem to conduct an independent online survey among web and app users to measure their opinions on website and app performance.
- Data was not weighted, so results have been reported on an individual country basis.
- Combined country results (i.e. total sample) are largely influenced by the UK (n=1,000) and the US (n=1,000), who dominate the sample over Sweden (n=250).
- Percentages in the report are rounded to the nearest 1%.

SAMPLE

- Internet users in the US, UK, and Sweden were surveyed online, with a total sample size of 2,250. These comprised a demographically representative sample by age, gender, and region by market. The below table details the numbers and demographics by market.



BASE: UK n=1,000, USA n=1,000, Sweden n=200

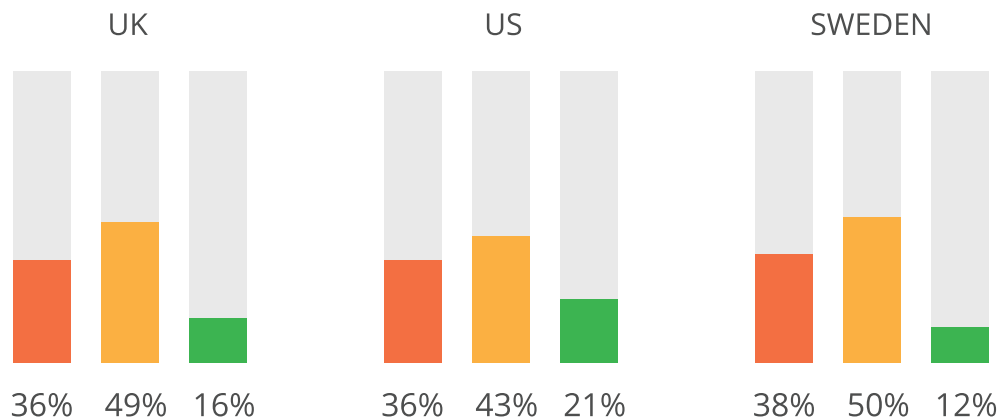


QUESTION 1

WHAT IMPACT DO WEBSITE OR APP LOADING DELAYS HAVE ON YOUR WILLINGNESS TO BUY PRODUCTS AND SERVICES ONLINE?

- Over one third of respondents say that slow loading times mean they abandon sites quickly.
- Around one half of respondents say that page loading delays are slightly likely to affect their willingness to buy products and services—due to losing patience.
- Well over three quarters of consumers in all markets are affected negatively by poor website or app loading delays.

Results by Region



- Significantly, I tend to abandon slow websites quickly
- Slightly, I can lose patience
- Not at all, for the right brand I am prepared to wait

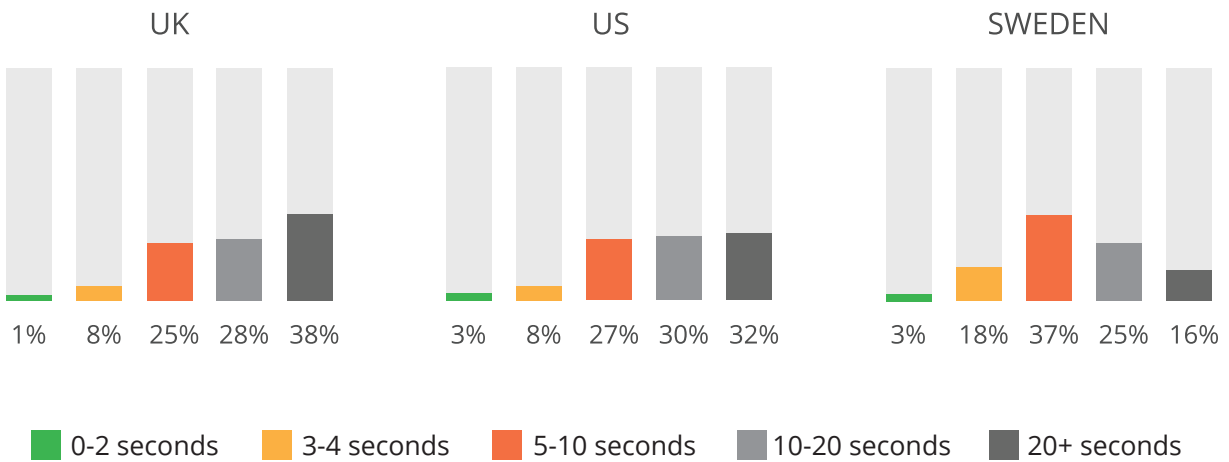


QUESTION 2

WHAT'S THE GREATEST AMOUNT OF TIME YOU WOULD WAIT FOR A WEBPAGE OR APP TO LOAD BEFORE YOU MOVE TO AN ALTERNATIVE?

- 40% of users won't wait more than ten seconds for a website to respond before navigating away.
- 11% of consumers won't even give a website five seconds before moving onto another site.
- Around two thirds of those in the UK and the US are willing to wait for 10 seconds or longer for a webpage or app to load before moving to an alternative. However, in Sweden, this proportion is only 41%—showing Swedish users are less patient.

Results by Region

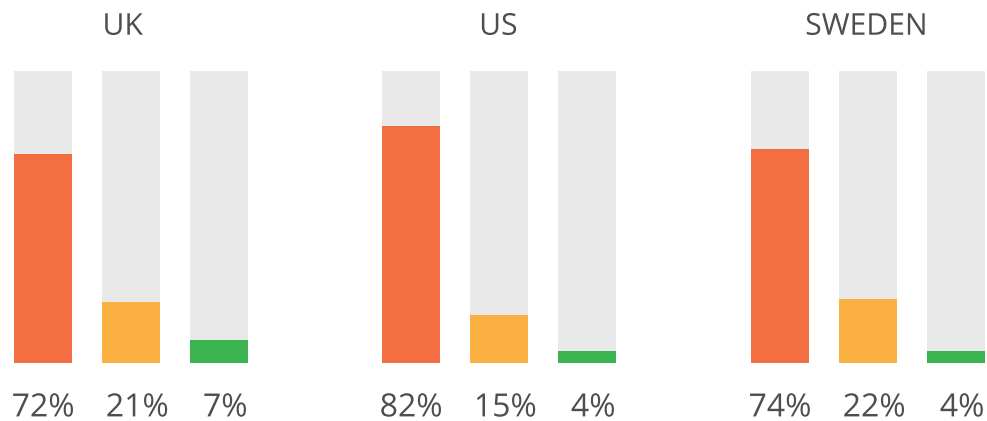


QUESTION 3

DO YOU EXPECT WEBSITES AND APPS TO LOAD FASTER TODAY THAN YOU DID THREE YEARS AGO?

- Expectations of page loading speed have increased in all three markets surveyed.
- The vast majority of respondents expect websites and apps to load faster than they did 3 years ago.
- The US has the highest expectations of the three markets.

Results by Region



■ Yes, my expectations have gone up significantly

■ I have the same expectations

■ I have no expectations/ I don't know

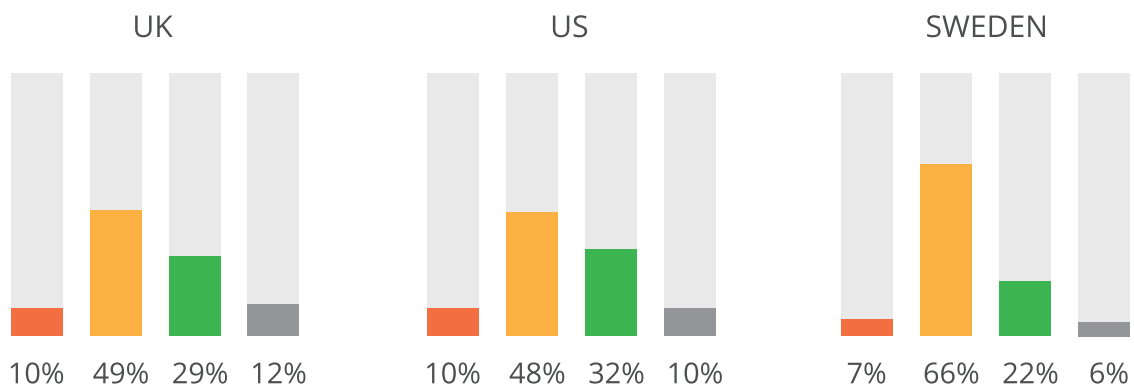


QUESTION 4

HOW DOES POOR WEB OR APP PERFORMANCE AFFECT HOW YOU FEEL ABOUT A BRAND?

- Poor web or app performance undermines people's relationship with a brand, with a significant impact on loyalty. Overall, 60% of consumers would be less loyal towards a brand if they experience poor website or app performance.
- When it comes to market contrasts, users in Sweden are the least forgiving of brands. If web or app performance is poor, then two thirds of Swedish consumers will be less loyal.

Results by Region



- I would never go back to that brand for goods or services
- I'm likely to be less loyal towards the brand but I'd still buy from them
- I'm disappointed but it doesn't impact my brand loyalty
- I have no particular feeling/ I don't care

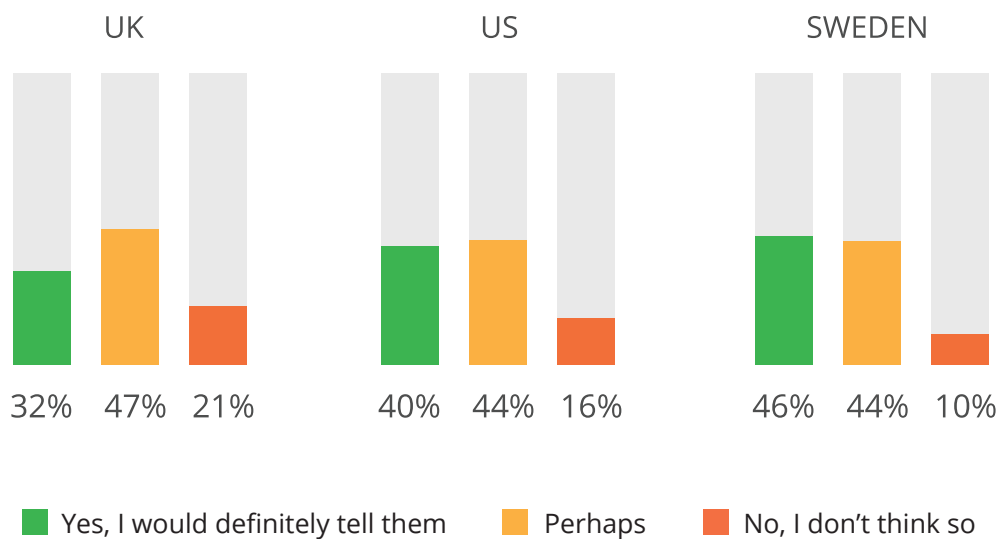


QUESTION 5

IF YOU EXPERIENCED POOR WEBSITE OR APP PERFORMANCE THAT PREVENTED YOU FROM BUYING A BRAND'S PRODUCTS OR USING ITS SERVICES, WOULD YOU TELL YOUR FRIENDS OR COLLEAGUES?

- The vast majority of consumers will mention poor webpage or app performance to friends or colleagues, with 83% of respondents admitting they would share a poor website or app experience.
- Almost 4 in 10 (37%) would definitely share a poor experience.
- Swedish consumers are the most likely to share a negative experience (46%).

Results by Region

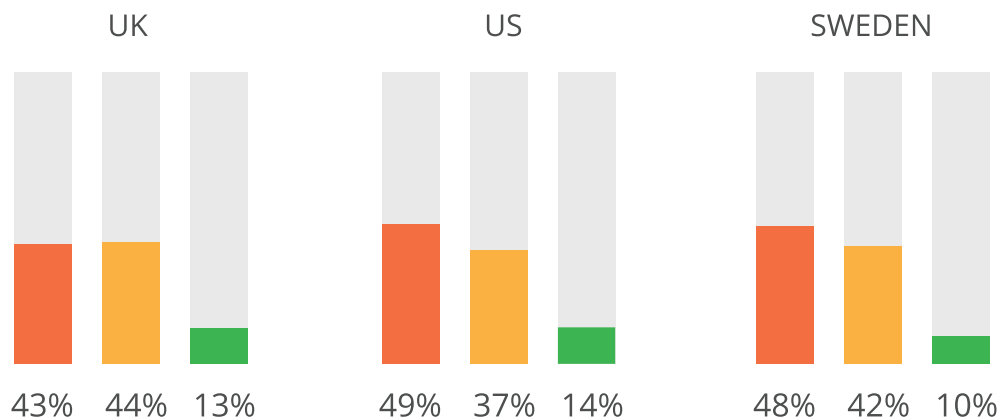


QUESTION 6

DO YOU THINK IT IS ACCEPTABLE FOR WEBSITES/APPS TO BE UNAVAILABLE DUE TO SCHEDULED MAINTENANCE?

- Users are generally realistic about the need for website or app downtime—only about a tenth of users expect online services to be in action 24-7.
- However, 54% of users said that several hours of planned downtime were unacceptable. These respondents had an ‘upper limit’ of one hour.
- 46% would accept extended downtime only if reasons were made clear for the outage.
- More than 1/10 (13%) expect 100% uptime.

Results by Region



- Yes, as long as the downtime is communicated, it is acceptable for a brand to be offline to its customers for several hours in a day
- Yes, but more than 1 hour is unacceptable
- No, I expect 100% uptime in today's tech environment



REPORT SUMMARY

The results of this survey show that consumers are ever more demanding and are becoming less forgiving when it comes to website and app performance. With three quarters of users expecting sites and apps to perform faster than they did three years ago, brands have to recognize that they need to manage the peaks and troughs of online traffic and deliver better customer experiences.

The survey also highlights 'Digital Desertion' syndrome; that if users are disappointed by their digital experience, the majority of them are likely to be less loyal to the brand, or worse still, move over to competitors' websites.

Most importantly, negative digital experiences are also likely to have an impact on brand reputation with almost 4 in 10 consumers admitting they would be likely to share a poor experience.

In this environment, the pressure is on businesses to continuously monitor and optimize their online performance to ensure they deliver a digital experience that meets today's user expectations.



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Apica monitors ecommerce websites and publishes an annual Black Friday Web Performance Index. The 2017 index is due to be published late November after Black Friday and Cyber Monday.

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