

PERFORMANCE MATTERS

CONSUMER INSIGHTS FROM THE UNITED KINGDOM

3



In the new hyperconnected world, we no longer go online, we are online. The ubiquity of mobile devices, the increase in WiFi availability and new technological advancements have fundamentally changed the consumer web experience. In response, companies must keep pace with ever-changing consumer expectations to deliver rich, engaging quality web experiences to end users across devices, networks, platforms and operating systems. Akamai launched the Performance Matters series to identify key web consumer performance insights in the e-commerce and financial services industries in the form of page load expectation, device preference, reactions to dissatisfying web experiences and more.

How we got here:

The Performance Matters series was developed based on findings from the 2014 Consumer Web Performance Expectation Survey conducted for Akamai by Taylor Nelson Sofres (TNS). The survey consisted of 3,487 respondents located in the United States, United Kingdom (U.K.), France, Germany and Japan. All respondents were above the age of 18 and had accessed the Internet in the past three months. This report will focus specifically on consumers in the United Kingdom.

What Do U.K. Consumers Want?

To provide consumers with web experiences that satisfy them and encourage them to return, companies must know what consumers expect when they visit a site. Fortunately, consumer expectations are abundantly clear and consistent across surveyed countries – that websites be secure, user friendly and fast. U.K. consumers' top website expectations are:

My personal information to be kept secure and private

76%

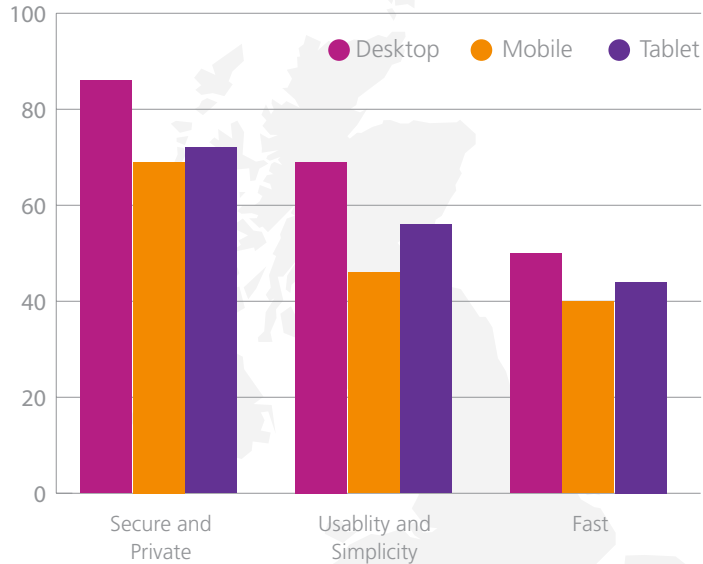
The website must be easy to use and simple to understand

57%

The website must be fast

45%

Top Website Expectations By Device



U.K. consumers also rank first of all countries with **86%** of desktop users and **72%** of tablet users who expect secure web experiences.

Desktop users have the highest expectations for all of the below categories.

- 86% secure web experiences
- 69% expect sites to be user friendly
- 50% expect sites to be fast

What Causes U.K. Consumer Dissatisfaction?

In order to solve the web performance problems facing consumers, companies must first understand what exactly is causing visitors to have bad experiences. The leading two problems causing dissatisfaction among U.K. consumers are “website slow to respond” and “website not available.”



57%
Slow Response



55%
Lack of availability

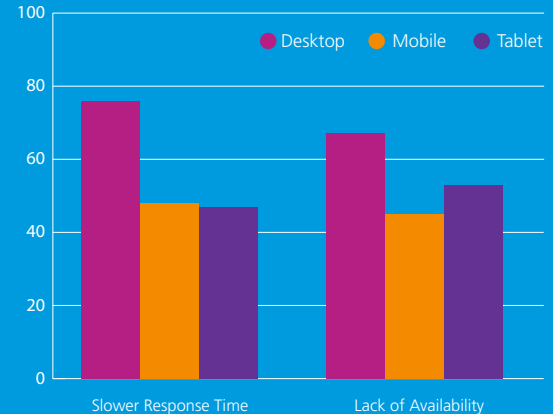
Website Dissatisfaction By Device

The percent dissatisfied by lack of availability is correlated to web application attack metrics in the U.K. Akamai's State of the Internet report and shows that U.K. websites were the third most targeted for web application attacks. In regards to DDoS attacks, there has been a notable rise in attack IP's originating from the U.K. over the last 6 months.

By device, a higher percentage of desktop users than mobile or tablet users consider the above top problems - 76% cite slow response and 67% cite lack of availability as the leading causes of bad website experiences. This ranks first of any country in both categories and is as much as 30% higher than mobile and tablet users.

The reason for the disparity is that a higher percentage of mobile and tablet users cite usability issues, such as "could not do task I wanted to," as a top problem. By country, U.K. tablet users are tied for first with the U.S., with 53% who see lack of availability as a top problem. The business impact of poor website performance is very real. Take the following statistic from the Aberdeen Group: If a site averages \$100,000 a day in revenue; a one-second delay costs \$2.5 million in sales every year.

TOP PROBLEMS CAUSING WEBSITE DISSATISFACTION



DESKTOP USERS

76%: Slow Response

67%: Lack of Availability

How Do U.K. Consumers React to Bad Web Experiences?

U.K. consumers respond to bad web experiences in a variety of ways, and all of them are bad for business. One bad website experience can have an impact far beyond one lost sale or transaction. In addition to abandoning sites, U.K. consumers are less likely to return to a site, will second-guess making a transaction or have a more negative view of the company after a single bad experience. U.K. consumers react to bad web experiences in the following ways:

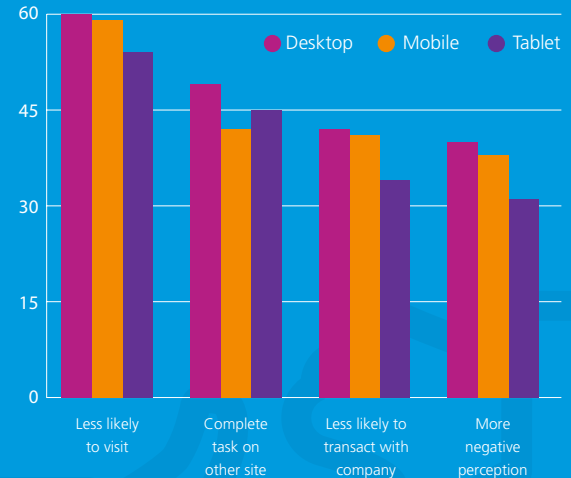
58%: less likely to visit website again

45%: abandon and complete task on another site

39%: less likely to complete transactions with the company online

36%: will have a more negative perception of the company

REACTIONS TO BAD EXPERIENCES BY DEVICE



These reactions have real implications for companies looking to attract and retain customers. Consumers want fast, user-friendly websites, and dissatisfaction is primarily caused by a website's slow response and/or lack of availability. In response to these web experiences, consumers abandon websites and lose faith in the company.

To gain a better understanding of the impact of website performance on consumer behavior, our survey gathered industry-specific data in the e-commerce and financial services (including banking and investing) space. While analyzing data on engagement, web performance expectation and device preference, we identified three key takeaways prevalent across industries.


A person is holding a white tablet computer in their hands. The background is a blurred outdoor scene with warm, golden light, suggesting a sunset or sunrise. A large, semi-transparent number '1' is on the left side of the image. A dark horizontal bar is overlaid across the middle of the image, containing white text.


U.K. Mobile and Tablet Users are More Active than Desktop Users Across Industries

U.K. Mobile E-Commerce Consumers are the Most Engaged Researchers.

Online shoppers' top three weekly activities across devices are search, compare prices and read reviews. Purchasing products was the fourth most-frequent activity for U.K. shoppers, with more than one-third doing so once a week or more, as shown in the following data.

 **Search**
50% weekly | 12% daily

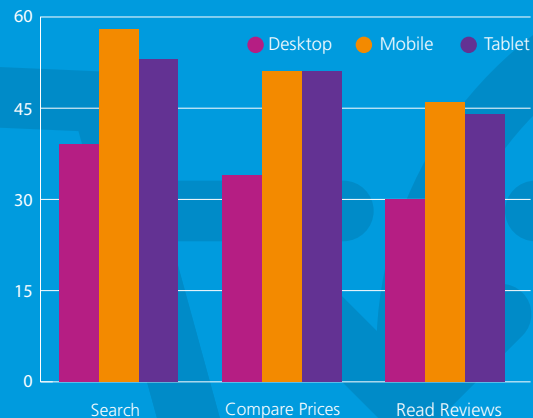
 **Compare Prices**
45% weekly | 9% daily

 **Read Reviews**
40% weekly | 7% daily

 **Buy**
36% weekly | 5% daily

Clearly, U.K. shoppers on the whole are engaged e-commerce consumers. In the diagram to the right we see the frequency of their research activity varies significantly depending on what devices they use.

TOP WEEKLY E-COMMERCE ACTIVITIES



Across activities, mobile users are most engaged in e-commerce research activities, with tablet users a close second. Desktop activity rates lag behind significantly at a range of 16% to 19%, depending on activity. Thanks to the “always on you” nature of mobile devices, users can accomplish these activities without the same limitations desktop users face, such as physical location or requiring a connection.

Whether a consumer is visiting a website for research purposes or with the intent to buy, providing a [quality experience across devices](#) is essential. As we saw in the consumer response to dissatisfaction, one bad website experience can have a significant negative impact on consumer behavior. These reactions aren’t just felt in online revenue, either – they are seen in brick-and-mortar stores. The increase of omni-channel web experiences and rise of emerging in-store technology, like ibeacons and other personalization efforts, emphasize the necessity of providing end users with great website experiences on any device.

It's important to take into account that many shoppers visit websites multiple times before actually making a purchase. Retail sites aren't only tasked with providing fast, reliable and secure web experiences once, they must do so repeatedly before shoppers convert to make a single purchase, then continue to do so for future visits to nurture a loyal customer base.

80%: Webroom

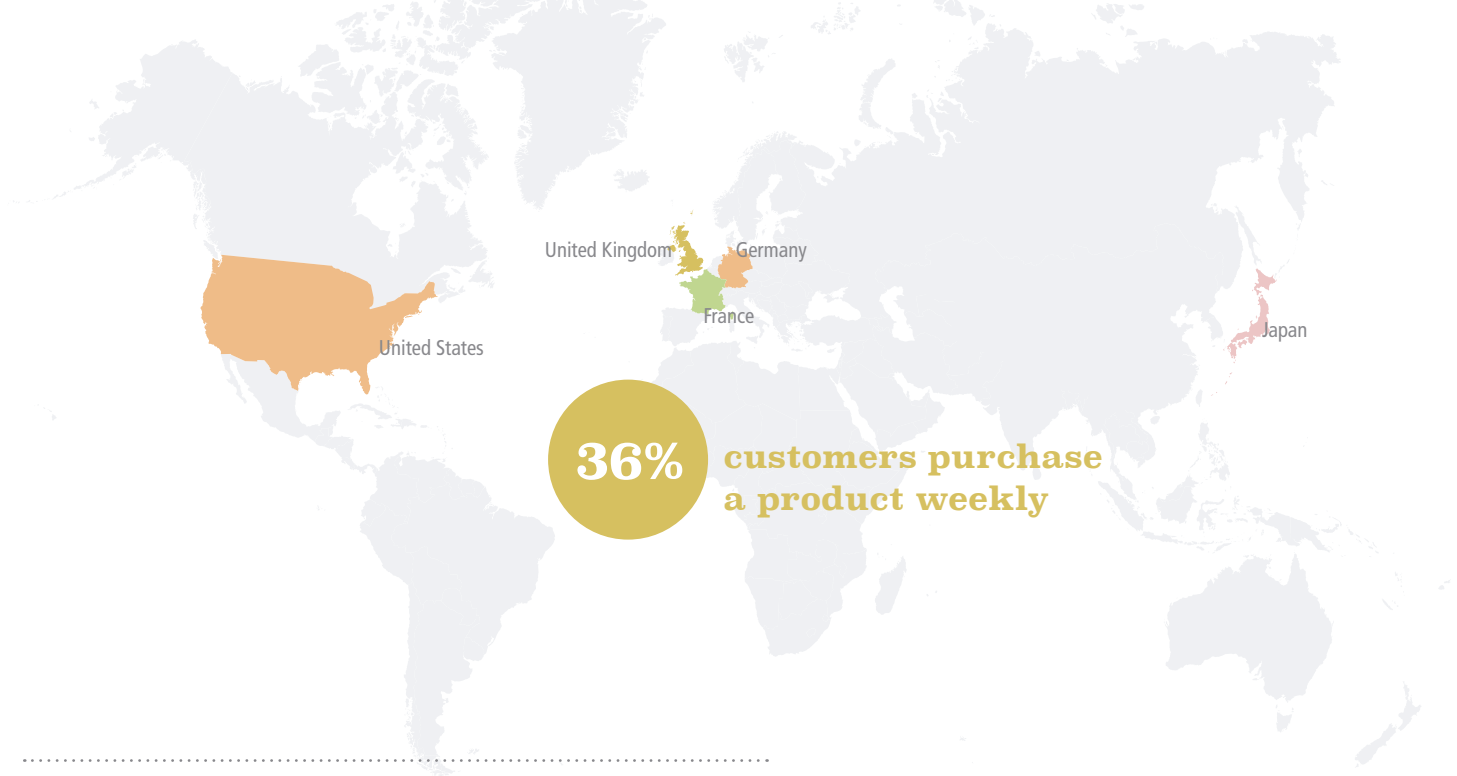
(research a product online and purchase in-store)

68%: Showroom

(research a product in-store and purchase online)

U.K. Shoppers Buy the Most of Any Surveyed Country.

Purchasing products is an area where U.K. shoppers stand out when compared to other countries. With 36% of customers purchasing a product weekly, the U.K. ranks first among all surveyed countries — 5% higher than the next-highest country.



36%

**customers purchase
a product weekly**

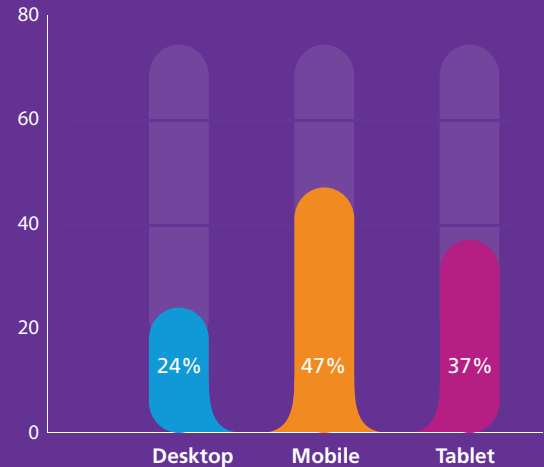
Mobile Shoppers Buy More Than Tablet or Desktop Shoppers

By device, mobile users buy the most frequently by a significant margin— double the frequency of desktop users and 10% more than tablet users. Nearly half of U.K. users on mobile purchase a product weekly – representing the highest mobile buying frequency for any country surveyed, 10% more than the second-highest country. While the 24% of users who purchase a product weekly on desktop seems low as compared to mobile, it is the highest weekly desktop buy of any country.

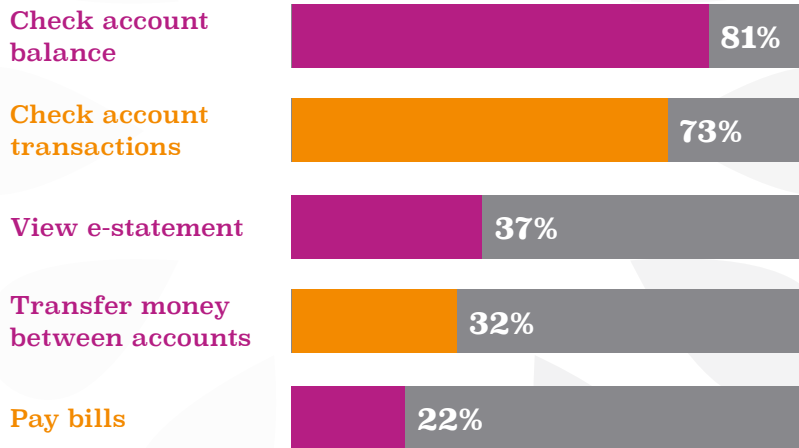
What we can gather from the above is that U.K. consumers are very decisive buyers. Their research rates are actually lower than other countries, yet their frequency of purchasing ranks first. These decisive, highly engaged users represent a huge opportunity for e-commerce sites; companies can't take chances and let these consumers abandon their site to make purchases on a competitor's due to website performance issues.

Shoppers on mobile and tablet spend an average of \$750-\$850 more per year than desktop-only shoppers and are 2x more likely to make a purchase of \$250 or more.

WEEKLY PURCHASE PRODUCT BY DEVICE

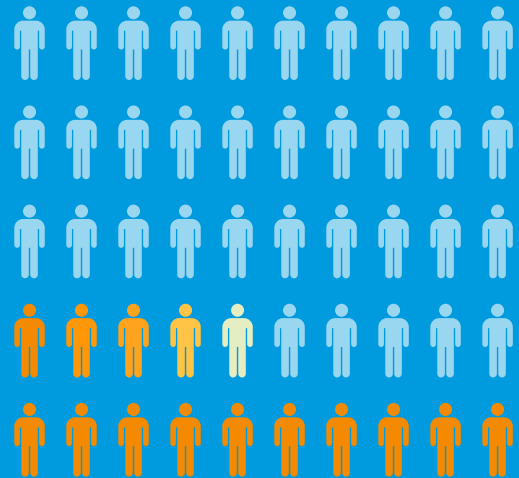


Online bankers in the U.K. are very active in weekly account monitoring activities such as checking balances or transaction history. Across surveyed industries these two activities are the most frequently completed by U.K. consumers. U.K. bankers participate in account monitoring 23-30% more often than online shoppers search, which is the third most frequent activity for U.K. consumers.



Compared to other countries, U.K. online bankers rank first for checking transactions and viewing e-statements and second in checking balance and transferring money.

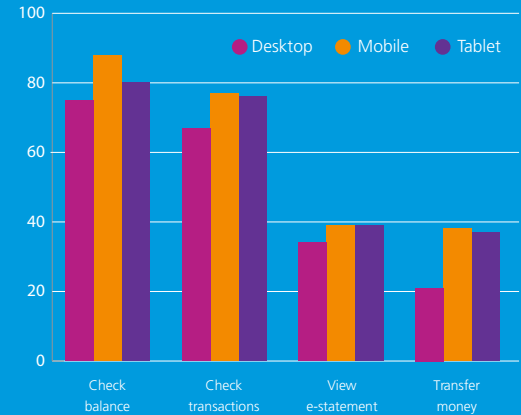
U.K. BANKERS PARTICIPATE
IN ACCOUNT MONITORING
23-30% MORE OFTEN THAN
U.K. SHOPPERS SEARCH.



Mobile Users Are The Most Engaged Online Bankers

Mobile and tablet users are more active online bankers than desktop users. Evaluating the top four weekly activities by device, checking account balance, checking account transactions, viewing e-statements and transferring money between accounts, mobile users rank first in all categories, 5-17% higher than desktop. Tablet users rank a close second to mobile users in all categories.

TOP WEEKLY ONLINE BANKING ACTIVITIES



Mobile Users Rank First for Online Banking Activity.

Mobile users' daily activity is also notably high in several categories, with 37% checking a balance daily and 23% checking transactions daily. Tablet users rank first of all countries for checking transactions and viewing e-statements, while desktop users rank first for viewing e-statements.

U.K. consumers are embracing the "always on you" nature of mobile devices, and the impact is prevalent, especially for account monitoring activities such as checking a balance or transaction history. The high engagement level of online bankers, both compared to other industries and other countries, displays the opportunity for growth as U.K. consumers continue to adopt online financial services tools. We expect this growth to continue increasing as we see brick-and-mortar bank branches becoming more automated and disappearing from our high streets.

U.K. Online Investors Are the Least-Involved Consumers Across Industries, but Active Compared to Other Countries

While e-commerce and online banking are well-established practices, investing is one of the next up-and-coming online consumer industries. While not quite as engaged as their e-commerce or banking counterparts, U.K. online investors do frequently perform a myriad of investing activities on their devices, specifically account monitoring activities. Viewing an e-statement and checking a portfolio balance are the top two weekly activities completed by U.K. investors.



46%: Viewing an e-statement



34%: Check trading history



42%: Check a portfolio balance



27%: Research stocks/bonds/mutual funds



36%: Transfer money between accounts



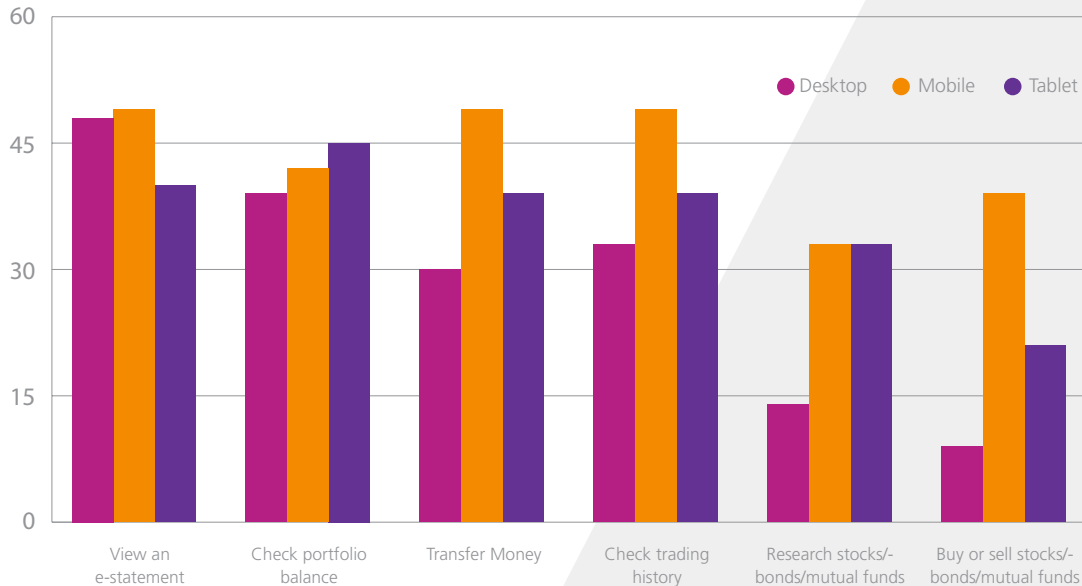
23%: Buy or sell stocks/bonds/mutual funds

U.K. investors are quickly adopting online investing compared to other surveyed countries. Consider the following: U.K. investors rank first of all surveyed countries, with 45% who view e-statements weekly and 36% who transfer money between accounts weekly.

Online Investors Are More Engaged on Mobile and Tablet Than Desktop.

Similar to e-commerce and financial services users, mobile and tablet investors are more active than desktop users.

Top Weekly Online Investing Activities



The largest disparity above is between mobile and desktop users buying or selling stocks, bonds, and mutual funds -

mobile users doing so 30% more frequently. Other disparities between activities are still significant, ranging between 19% and 25%. U.K. mobile users ranked first in several investment categories across countries, including 49% who check trading history and 49% who transfer money weekly. Of mobile users, 18% also transfer money daily, which is 2x more than any other country.

These statistics reinforce that online investing is a new industry that is fast becoming commonplace. Consumers want more personal control to monitor and handle their investments rather than simply trusting third parties to manage everything. Online investing sites must act now to capitalize on this opportunity to provide the same fast, secure, reliable web experiences consumers expect — before the competition does.

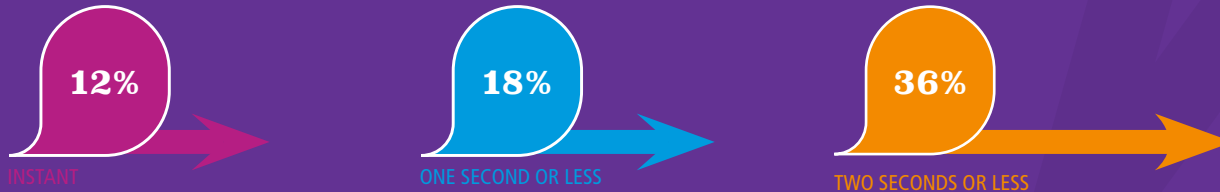
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Mobile and Tablet Users Have Higher Page Load Expectations than Desktop Users

As we've learned, mobile and tablet users are more active consumers across e-commerce, banking and investing industries than desktop users. While it stands to reason that most engaged consumers have higher web performance expectations, conventional wisdom and data show us that desktop has the fastest web performance. But what do consumers think? We hone in on three key page load speed categories — instant expectation, one-second-or-less expectation and two-seconds-or-less expectation — to better understand consumer website performance expectations by industry and device.

36% OF U.K. ONLINE SHOPPERS EXPECT PAGES TO LOAD IN 2 SECONDS OR LESS

Across devices, U.K. online shoppers expect pages to load in the following speeds:



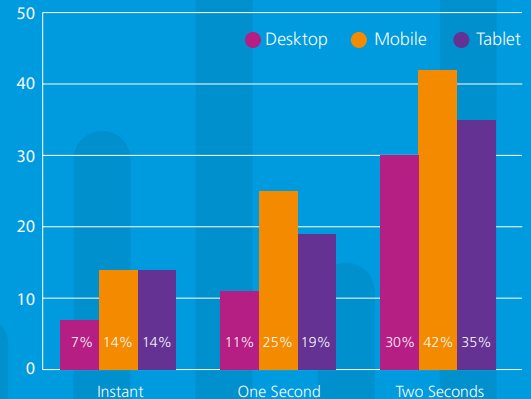
Online Shoppers Expect Pages to Load Fastest on Mobile, Followed by Tablet and Desktop

We learn a little more about U.K. shoppers' web performance expectations when we see them broken down by device. As you can see in the diagram to the right, U.K. mobile users have the highest page load expectation for websites in all three speed categories, with tablet either tied for first or in second place, and desktop last.

Particularly notable is the one second and instant expectations for mobile and tablet compared to desktop. Only 11% expect one second page load on desktop, while 14% expect instant on mobile and tablet. As page load expectation continues to increase, expect mobile and tablet consumers to be at the forefront of that increase.

The increasing page load expectation is important in context. Many sites are unable to provide the high web performance experiences than consumers expect on mobile and tablet, and we have seen the negative reactions consumers have when experiencing dissatisfaction. Considering findings in our e-commerce report Performance Matters – 9 Key Consumer Insights, that shoppers on mobile and tablet are more engaged, purchase products more frequently and spend more money than their desktop counterparts -- companies simply can't risk these shoppers having a bad experience on their site.

E-COMMERCE CONSUMERS PAGE LOAD EXPECTATION BY DEVICE

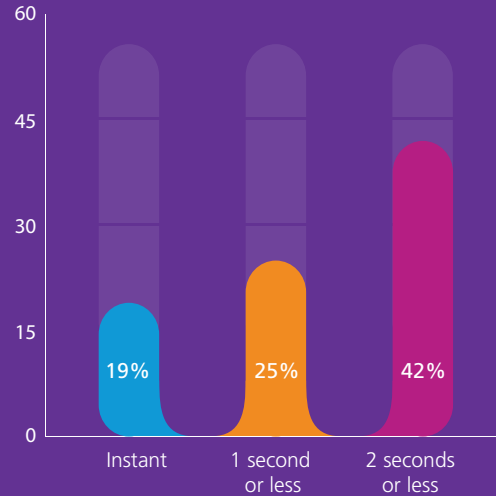


U.K. Financial Services Consumers Have Higher Expectations Than E-Commerce Consumers

The chart to the right displays financial services consumers (bankers and investors) page load expectations when visiting a website.

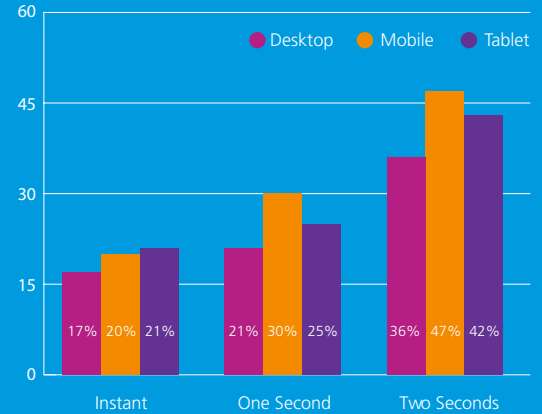
[Financial services consumers](#) have higher page load expectations than e-commerce consumers in all three speed categories, 7% more expect instant, 7% more expect one second, and 6% more expect two seconds. Similarly to e-commerce consumers, by device, mobile and tablet users expect pages to load faster than desktop users.

FINANCIAL SERVICES CONSUMERS PAGE LOAD EXPECTATIONS




In every speed and device category, financial services consumers have higher expectations than their e-commerce counterparts. Mobile users have the highest expectation for one second and two second page load, while tablet users have the highest expectation for instant. While financial services consumers on desktop have slightly higher expectations than e-commerce consumers, they still lag behind expectations on mobile and tablet. As we've learned, when faced with bad web experiences consumers abandon websites, don't return and lose faith in the company.

What can we take from this? Even though data shows desktop is a faster device than mobile or tablet, the more engaged, active, decisive consumers are found on mobile and tablet. These consumers, being more likely to participate in e-commerce and financial services activity on sites, represent a more discerning audience, and expect a higher level of [website performance](#) than those who access websites on desktop only. This is particularly important when you consider our next conclusion.



MOBILE USERS HAVE THE HIGHEST EXPECTATION FOR ONE SECOND AND TWO SECOND PAGE LOAD

A photograph showing several people's hands holding and using various mobile devices like smartphones and tablets. The background is slightly blurred, focusing on the devices. A large, semi-transparent, stylized number '3' is overlaid on the left side of the image. A dark horizontal band is positioned across the middle of the image, containing white text.

While Highly Engaged on Mobile and Tablet,
UK Consumers Still Prefer Desktop Experience

U.K. Consumers Device Preference

When asked which device U.K. consumers prefer for e-commerce and financial services, they cite preference for the desktop experience – by a considerable margin. Considering we've seen how U.K. consumers have embraced the "always on" nature of mobile devices based on their research, account monitoring, and buying habits across industries...why is this the case? Consider the high web performance expectations U.K. consumers have for mobile and tablet, higher even than users on desktop. It's our conclusion that companies are failing to meet the rising expectations of mobile and tablet users and provide them with fast, secure, reliable web experiences regardless of device or location. With these expectations consistently not being met, consumers cite a significant preference for the desktop experience.

What does this mean?

UK consumers expect the high performing, rich desktop experience on their mobile and tablet devices.



7 in 10
PREFER THE DESKTOP EXPERIENCE
FOR ONLINE SHOPPING

BUT...

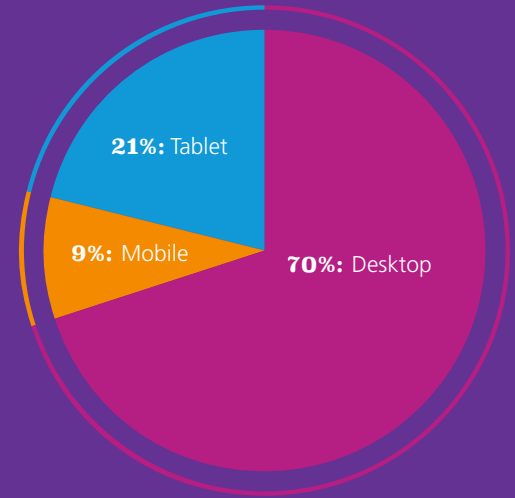


2x INCREASE
IN CONSUMERS
MAKING A PURCHASE
ON **MOBILE** SINCE **2009**

U.K. E-Commerce Consumers Prefer Desktop Experience, But Less So Than Other Countries

Mobile use in e-commerce has increased dramatically in recent years – the amount of consumers making a purchase on a mobile device has jumped 2.5x since 2009. Yet even with this increase in mobile browsing, 7 in 10 U.K. e-commerce consumers still cite desktop as their preferred device for online shopping.

Mobile and tablet experiences need to be improved to drive conversations and capture more purchases. Inroads are already being made in the U.K. to provide mobile and tablet users great web experiences regardless of device, platform, or network, and we see the effect its already having on consumers. Though the 70% who prefer the desktop experience significantly outstrips mobile and tablet preference, it is actually the lowest percent of e-commerce consumers who prefer the desktop experience of any surveyed country. In addition, the 21% who cite tablet as their preferred device is highest of any country.



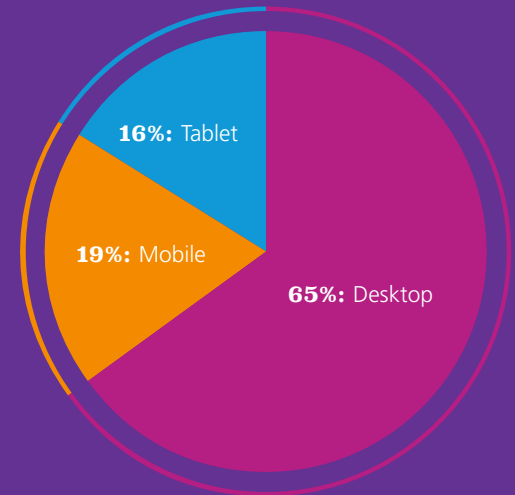
U.K. Financial Services Customers Prefer Desktop Experience, But Less Than E-Commerce Consumers & Other Countries

While U.K. financial services customers also vastly prefer the desktop experience to mobile or tablet, they do so at slightly lower rates compared to e-commerce consumers and to other surveyed countries.

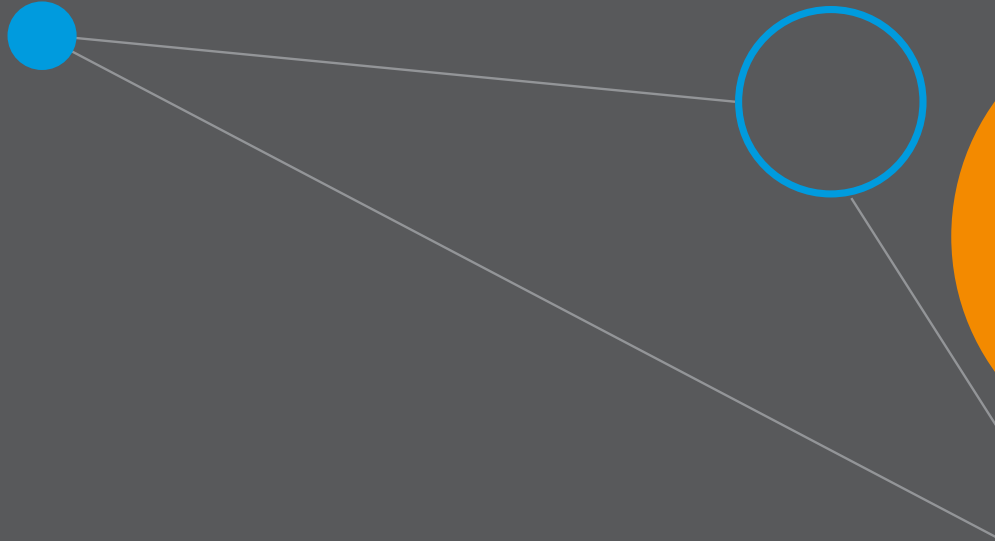
Like their e-commerce counterparts, U.K. financial services customers prefer desktop less than other countries. The 65% who prefer the desktop experience for financial services activities is the lowest percentage who prefer that device of any country or industry.

In addition, with 19% who prefer mobile and 17% who prefer tablet, U.K. financial services consumers have the highest preference for those devices of any country or industry. This is a clear indicator for U.K. financial services organizations that have not made optimizing for mobile a priority – you're already behind your competition, which is employing Responsive Web Design techniques coupled with [web performance optimization solutions](#). You risk alienating your most active and engaged consumers to competitors that have already made strides to ensure they provide end users with fast, reliable and secure web experience on any device, anywhere.

65% WHO PREFER DESKTOP EXPERIENCE FOR FINANCIAL SERVICES IS LOWEST



So what?





We know why the mobile revolution is taking place.

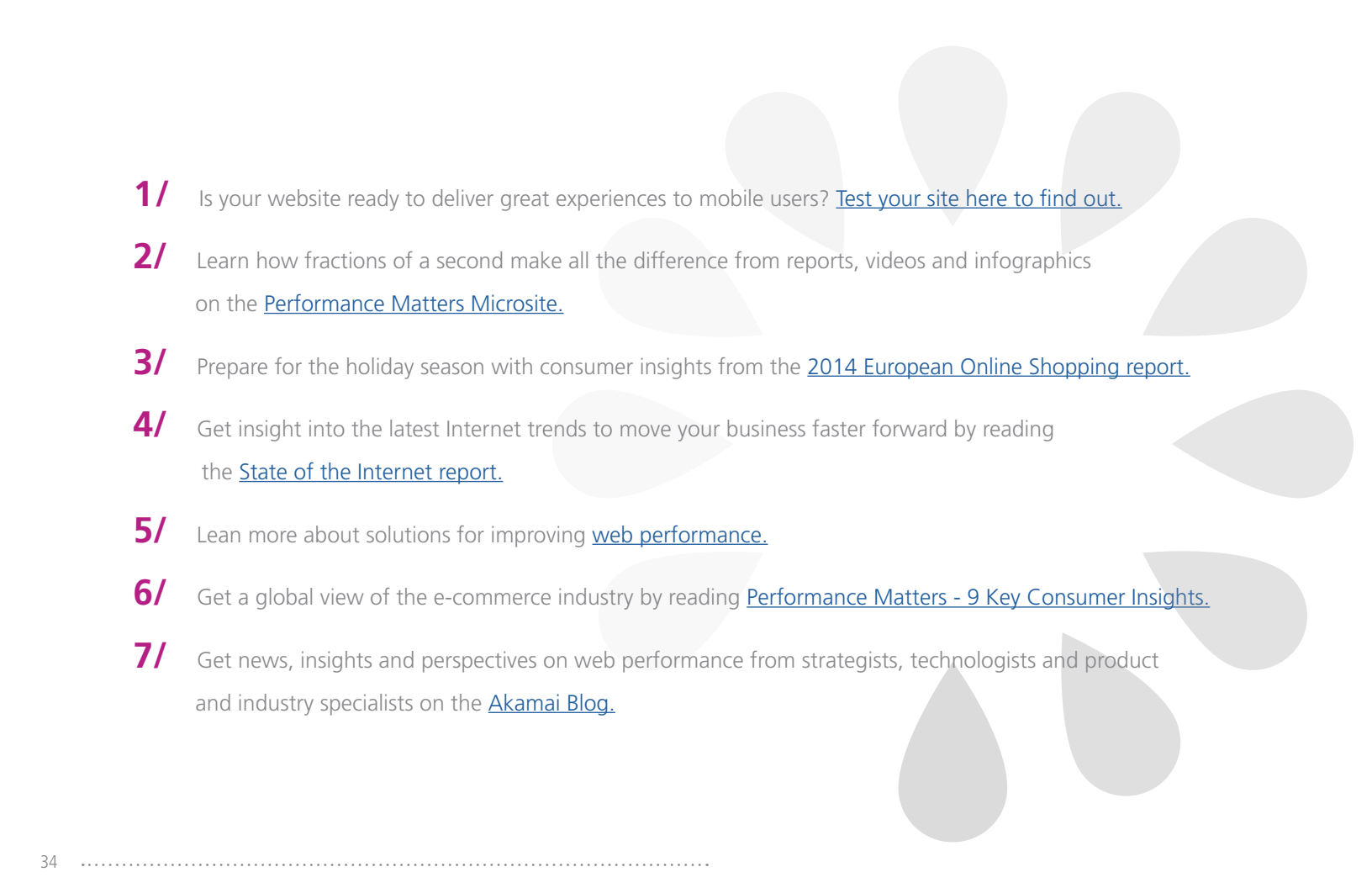
Mobile devices offer unprecedented convenience; access to the Internet is no longer limited by location like it was only a few years ago. However, mobile and tablet users are limited in a different way. They are subject to the massive web performance bottlenecks, spotty availability and a lack of inherent security on the public Internet. When you factor in inconsistent connectivity of mobile networks and the variety of devices, operating systems, browsers and locations consumer are trying to access information from – it's no surprise they have dissatisfying web experiences that lead them to distrust both their mobile or tablet device and the company whose site they visit.

Keeping mobile consumers happy is essential. They represent the greatest source of future revenue. They are more engaged, more decisive and spend more money than their counterparts on desktop. So, how do companies ensure they can provide end users with high quality web experiences today and in the future? Partnering with a [next generation CDN](#) to help overcome the challenges of content delivery in a holistic way is a key piece of the puzzle. By trusting a CDN that offers web performance, reliability, web security and scale to deliver their content, companies will be better prepared to face and embrace the hyperconnected world.

Now

What?



- 
- 1/** Is your website ready to deliver great experiences to mobile users? [Test your site here to find out.](#)
 - 2/** Learn how fractions of a second make all the difference from reports, videos and infographics on the [Performance Matters Microsite.](#)
 - 3/** Prepare for the holiday season with consumer insights from the [2014 European Online Shopping report.](#)
 - 4/** Get insight into the latest Internet trends to move your business faster forward by reading the [State of the Internet report.](#)
 - 5/** Learn more about solutions for improving [web performance.](#)
 - 6/** Get a global view of the e-commerce industry by reading [Performance Matters - 9 Key Consumer Insights.](#)
 - 7/** Get news, insights and perspectives on web performance from strategists, technologists and product and industry specialists on the [Akamai Blog.](#)



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