

“When Seconds Count”

National Consumer Survey on Website and Mobile Performance Expectations



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> Design and Methodology

Overview

- Gomez Inc. engaged Equation Research to conduct an online study to better understand consumer tendencies and practices around website speed and functionality.
- Interviews were conducted from June 25-29, 2010.

Methodology

- Ten minute online quantitative survey.
- Respondents recruited from Equation's nationally representative panel partner via email.
- Survey results may have a margin of error of plus or minus 3% at a 95% level of confidence.

Sample

1004 total respondents

- Must have done at least three different activities on the Internet (e.g., online banking).
- Survey invitations sent matching US census data representation for age, gender and income.



Key Findings

Speed makes a difference when it comes to accessing a website:

- Nearly one-third (32%) of consumers will start abandoning slow sites between 1 and 5 seconds

Slow websites are common and users feel frustrated with the recurring experience:

- Two thirds (67%) of web users say they come across slow websites at least weekly
- Over a third (37%) say it makes them less likely to return to the site
- 27% says it makes them more likely to visit a competitor's site

Most web users have visited sites and been unable to accomplish their goals:

- More than 80% of users say they have been unable to accomplish their goals – such as completing a purchase or a financial transaction – on a specific website at least once
- Nearly half (47%) say they have frequently abandoned sites where they couldn't finish their tasks in the past three months



Key Findings on Mobile Devices



MOBILE: Speed makes a difference when it comes to accessing a mobile website:

- 67% of all web users are also using a mobile device to surf the internet
- 17% of consumers will wait no longer than 5 seconds for a webpage to load before giving up

MOBILE Expectations: Half of users expect websites to load as quickly, almost as quickly or faster on their mobile phone, compared to their home computer. (Previous surveys have shown this number to be as high as 58%)

MOBILE: Problems unique to mobile devices include...

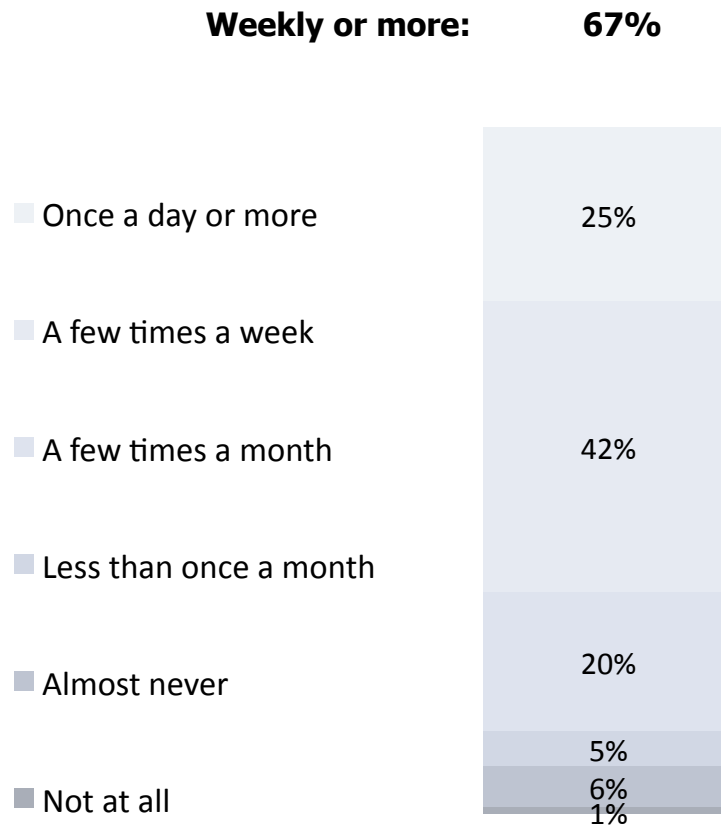
- Users say the two biggest mobile website problems are formatting, which makes sites difficult to read or use, and slow load time
- 20% of mobile users say their biggest mobile website problems are sites that crash or sites that are unavailable



Detailed Findings

Frequency of visiting slow loading sites

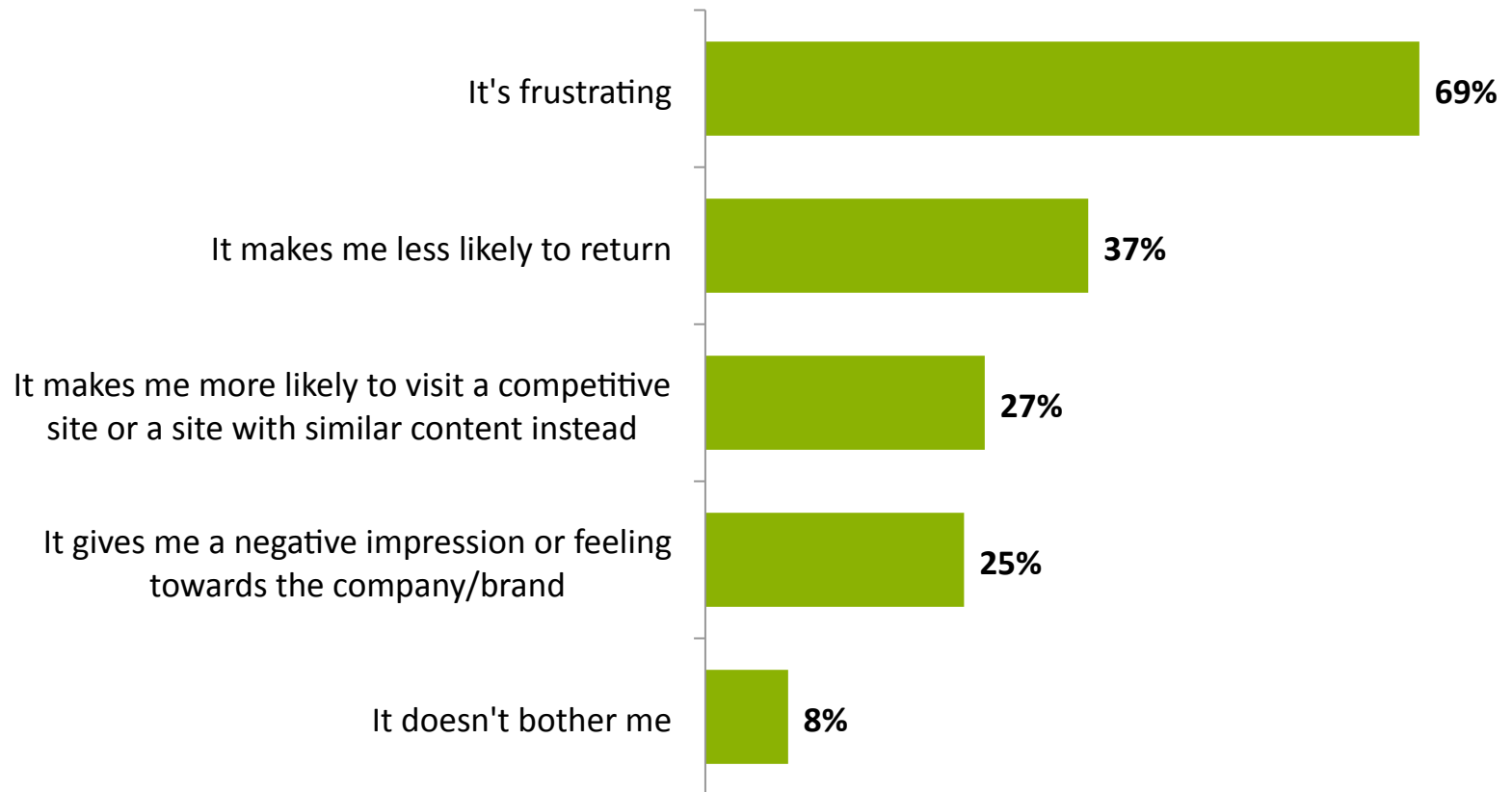
- Two-thirds of web users encounter slow loading sites on a weekly, or more frequent, basis. Very few say they never come across slow websites



Q2. How often have you visited a website recently and found that the web pages of that site loaded slower than you would expect? Base: Total Sample (N=1004)

Attitudes toward slow loading websites

- The majority of web users say they feel frustrated by slow loading websites. Over a third say it makes them less likely to return to the site

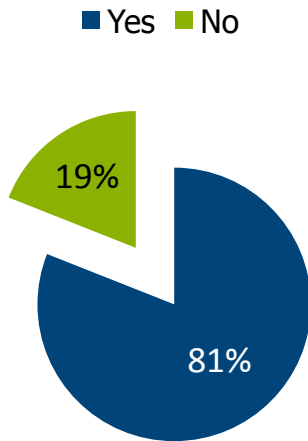


Q3. How do you feel when a website loads more slowly than you expect? Please select all that apply.
Base: Total Sample (N=1004)

Problems accessing websites

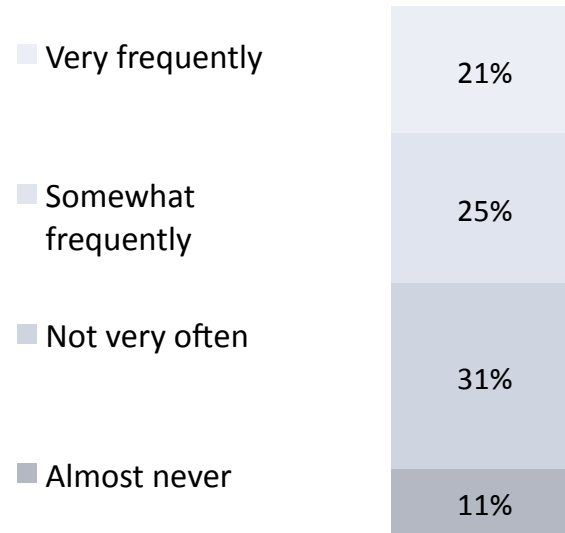
- Nearly all web users have visited a website and been unable to accomplish their goal
- Half say they frequently abandoned slow-loading sites in the past 3 months

Have visit a website and been unable to accomplish goal



Frequency of abandoning slow loading sites

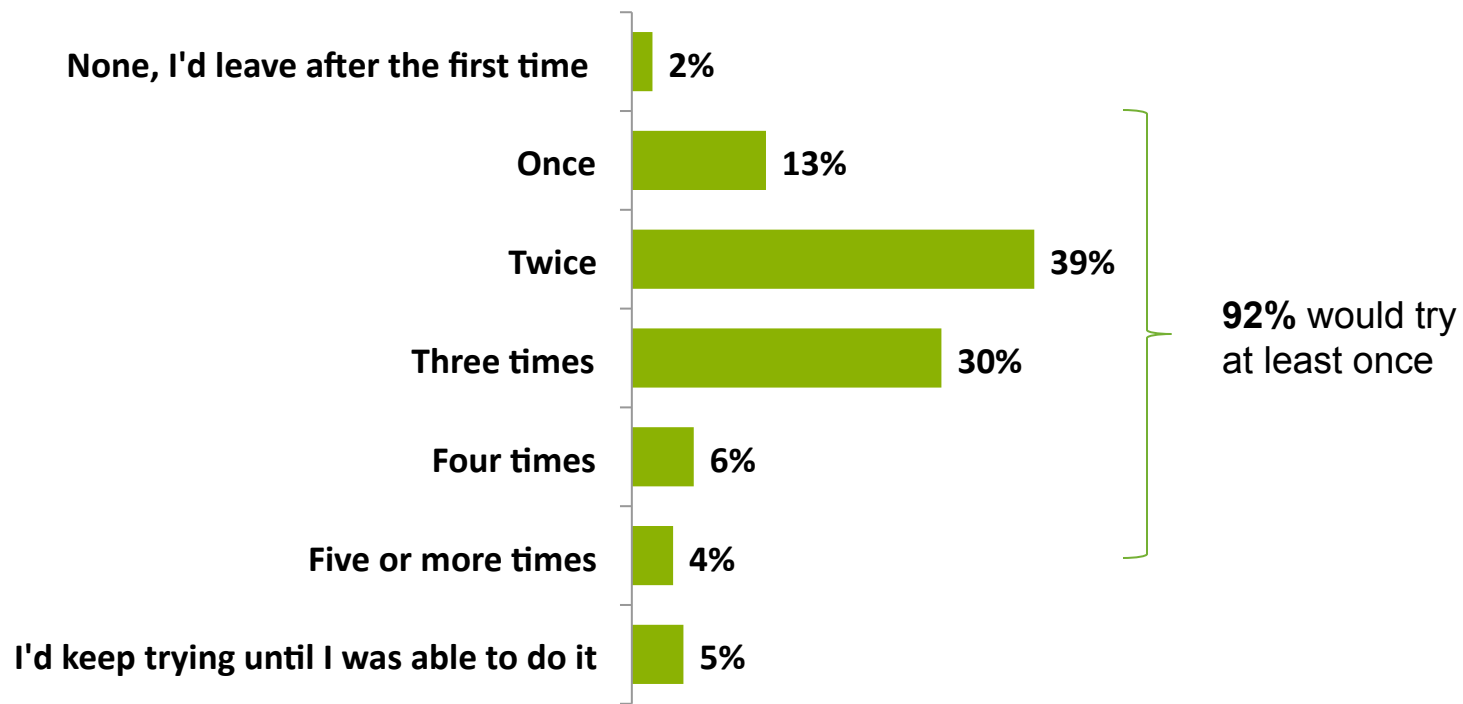
Very/somewhat frequently: 46%



Q4. Have you ever visited a website and been unable to accomplish your goal (for examples, complete a purchase or financial transaction)? Q5. How often have you abandoned a website in the past three months because it would not let you do what you were supposed to be able to do on that site?
Base: Total Sample (N=1004)

> Times willing to retry a website if it does not work on the first try

- Although the vast majority of web users are willing to retry a site if it doesn't work on the first try, most would only retry 1-3 times before giving up

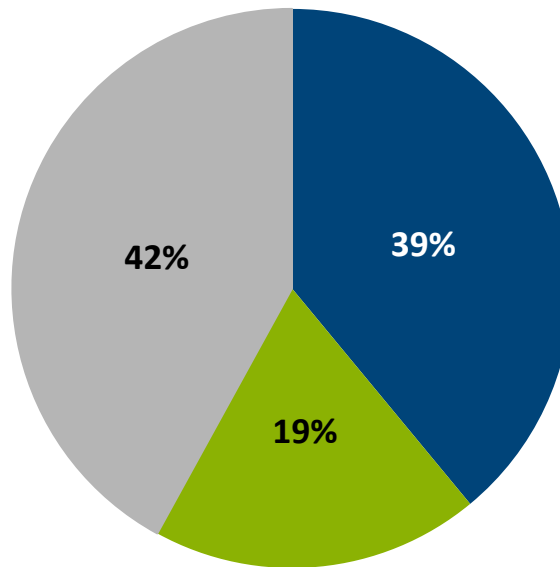


Q6. How many times would you re-try to do a specific task on a website (search, purchase, transaction etc) before giving up and abandoning the site? Please select one answer. Base: Total Sample (N=1004)

Website preference – speed vs. functionality

- Web users are evenly split between having faster sites and saying it depends on the site. Only one in 5 users would prefer a site with more functionality

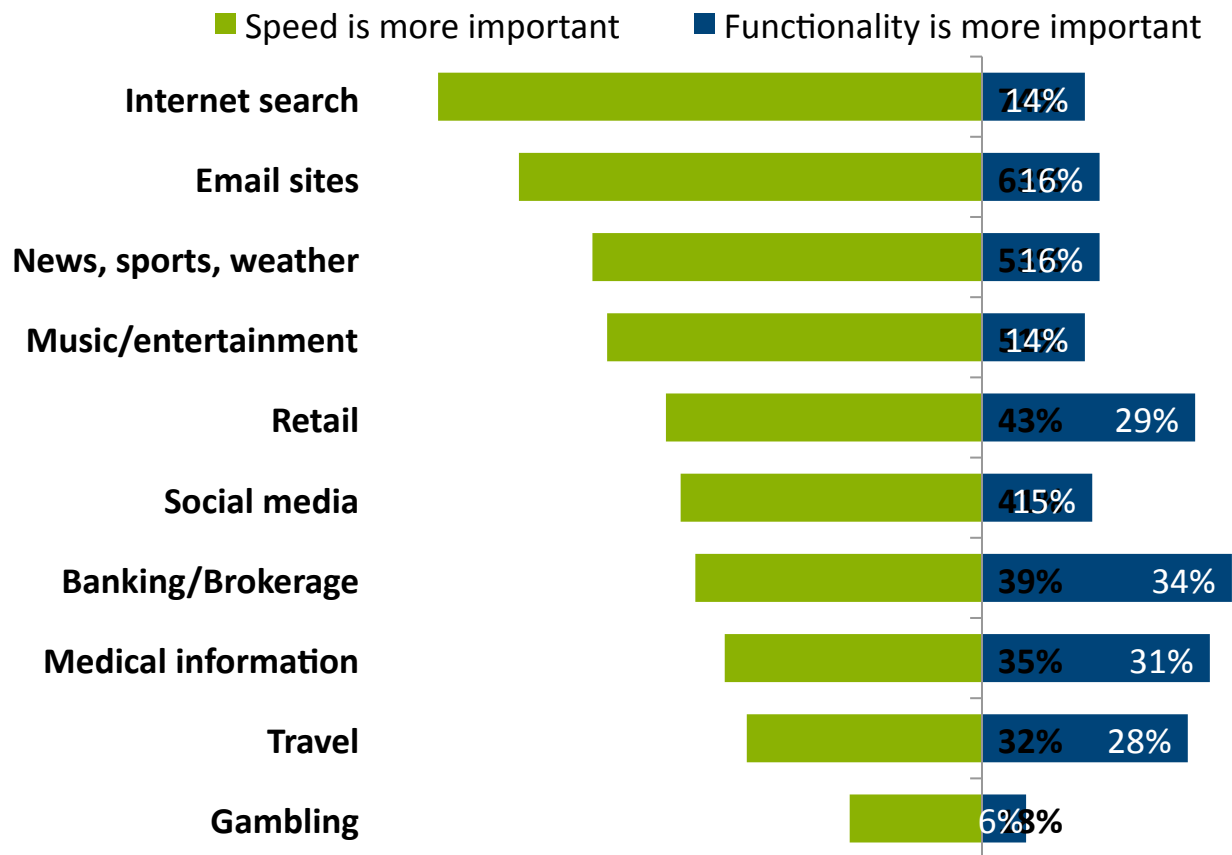
■ Faster site ■ More functionality ■ Depends on the site



Q14. If websites loaded faster and worked as reliably on your mobile phone as they do from your home or work pc/ laptop, would you use your mobile phone to access websites?
?Base: Experienced a problem (N= 602)

Speed vs. Functionality by type of site

- Web users say that speed is much more important than functionality for most sites. Only banking, medical and travel sites are evenly split between the two
- Three-quarters of users say that speed is more important than functionality for internet search sites. Two-thirds also want email sites to be faster rather than more functional



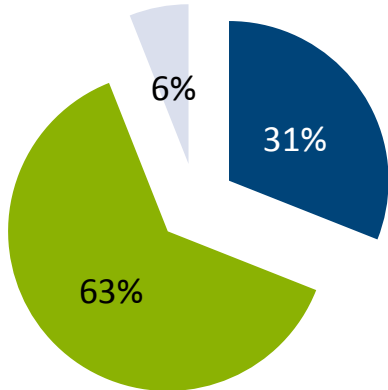
Q8. For the following types of websites, please let us know how important speed is compared to functionality?
 Base: Total Sample (N=1004)

Mobile website usage and willingness to wait for load

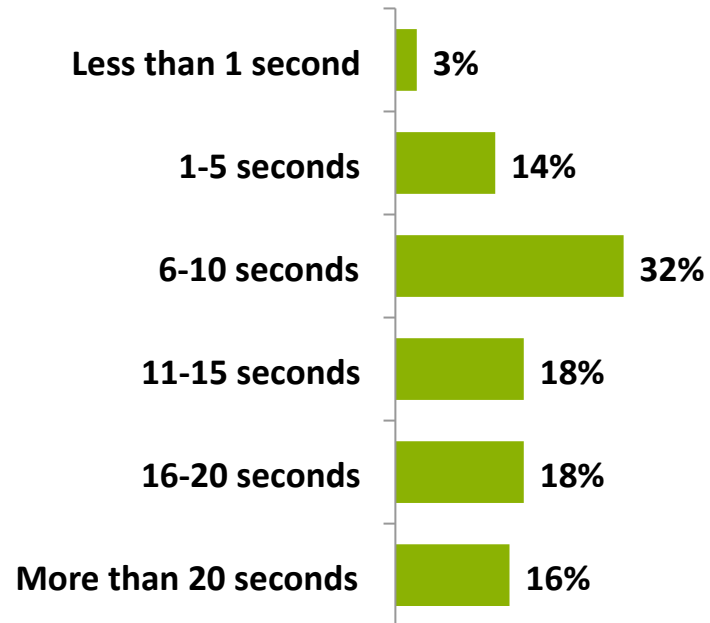
- Close to one-third of web users are also using a mobile device to surf the internet
- 17% will wait no longer than 5 seconds for a site to load

Access the Internet on mobile device

■ Yes ■ No ■ Don't own



Willingness to wait for website to load

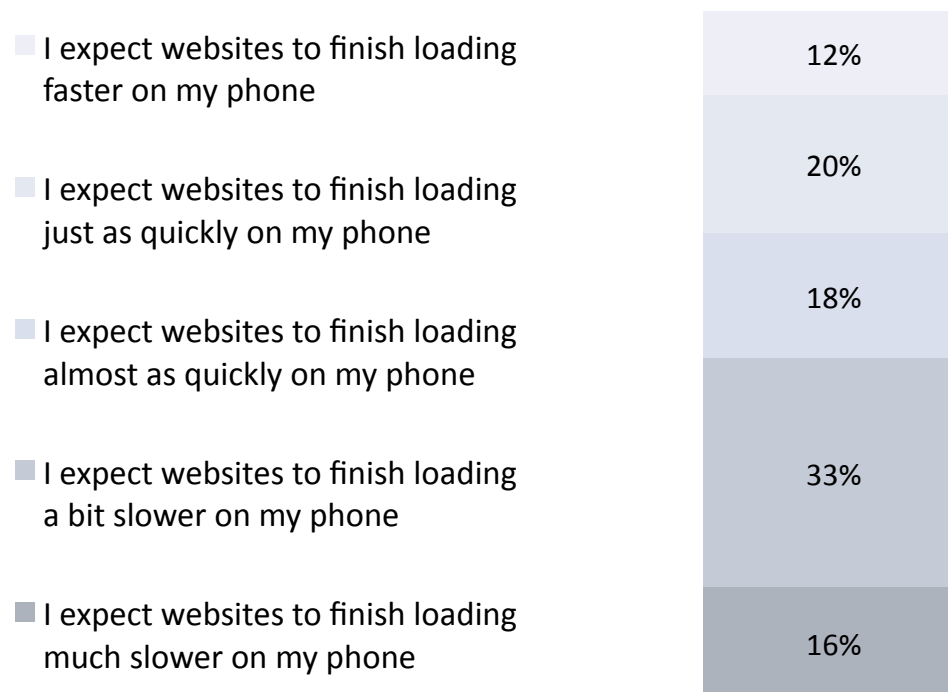


Q9. Have you used your mobile phone in the last months to access/surf the internet? Q11. When viewing a website on your mobile phone, how long are you willing to wait for the website to load before giving up and exiting the page? Base: Total Sample (N=1004), Use internet on mobile device (N=315)

> Webpage load expectation – mobile vs. home/laptop computer

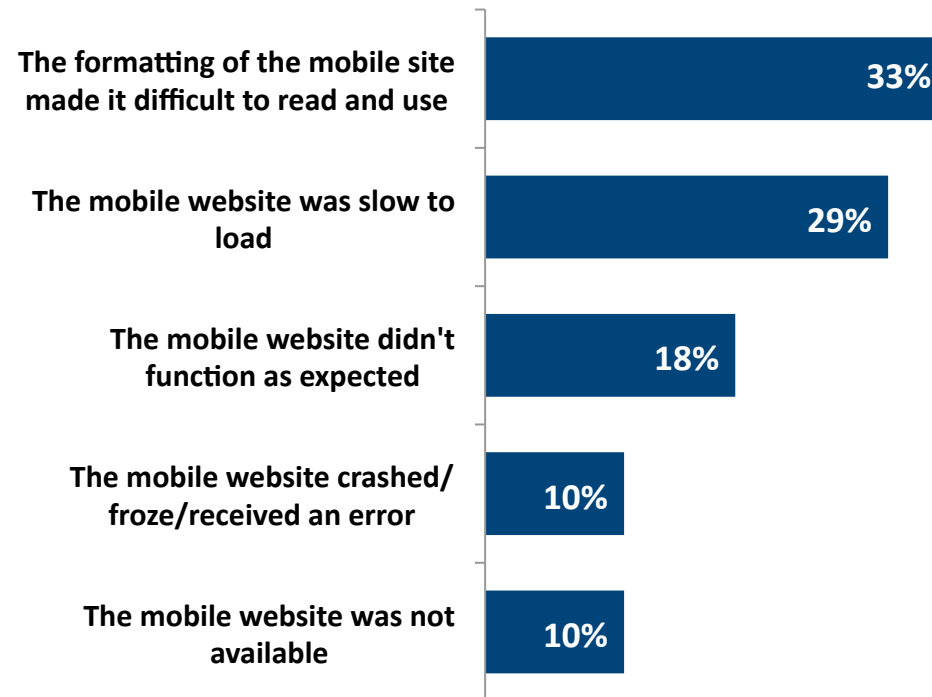
- **Half of mobile phone users expect websites to load as quickly, almost as quickly or faster on their mobile phone, compared to the computer they use at home**

Almost/just as quickly or faster: 50%



Q12. Compared to websites that you access from your home computer or laptop, how quickly do you expect websites to finish loading on your mobile phone? Base: Use internet on mobile device (N=315)

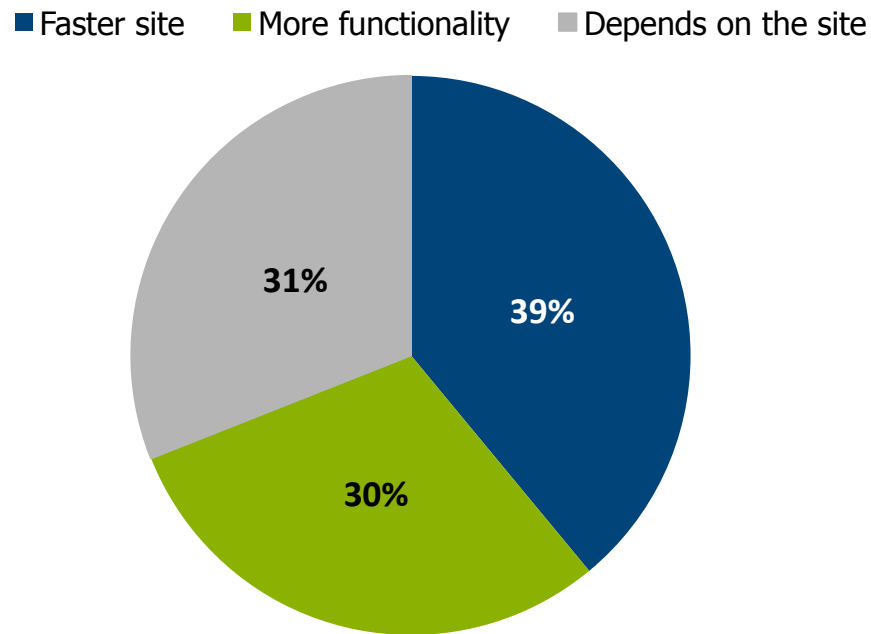
Most common problems accessing Internet from mobile phones



Q13. What is the most common problem you've encountered accessing websites on your mobile phone? Base: Use internet on mobile device (n=315)

Mobile website preference – speed vs. functionality

- Web users are split between wanting more functionality or more speed on mobile websites. Speed is slightly further ahead, but by a small margin



Q14. What is more important speed or functionality for mobile websites?
Base: Use internet on mobile device (N= 315)



Appendix I

Additional Measures

> Online web activities

	Non-Mobile	Mobile
Sending and receiving email	95%	70%
Internet search	95%	71%
Looking at maps and directions	78%	59%
Shopping	75%	20%
Reading news, sports, entertainment stories	74%	51%
Online banking/investing	73%	30%
Posting on Twitter, Facebook, MySpace, etc.	56%	53%
Travel arrangements	50%	12%
Finding local restaurants/entertainment	49%	43%
Downloading/streaming music	40%	26%
Downloading/streaming videos	38%	24%
Gamble	10%	NA
Use Smartphone applications	NA	31%

QS1. Which of the following activities do you typically do on the Internet? Q11. Which of the following activities do you typically do on the Internet from your mobile phone?
 Base: Total Sample (N=1004), Use internet on mobile device (n=315)



Appendix II

Sample Profile



Sample Profile

	Gender
Male	49%
Female	51%
	Age
16-20	5%
21-24	6%
25-34	18%
35-44	24%
45-54	19%
55-60	12%
61+	17%
	Income
Under 25K	22%
25-50K	31%
50-75K	21%
75k-100K	14%
100K+	11%



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