User Testing®

2017

UX AND USER RESEARCH INDUSTRY SURVEY REPORT
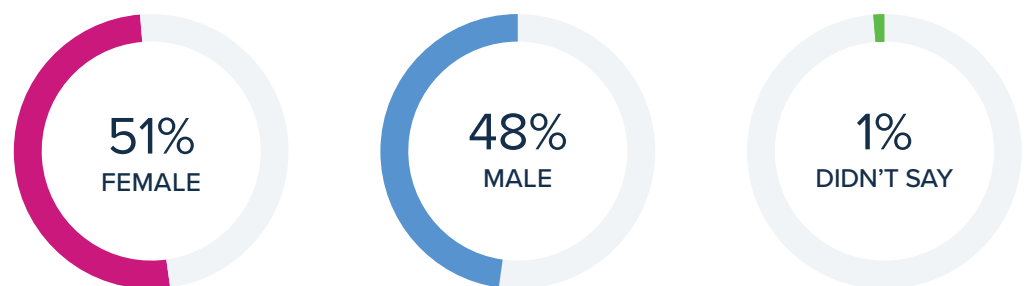
Our 4th annual industry survey.

The fields of user experience and user research have taken a new shape over the past few years. No longer relegated to a few lone champions in any given organization, the user experience has become the concern of everyone from product designers to senior executives.

In today's highly competitive market, customers have come to expect excellent experiences from digital products, and companies that aren't delivering can quickly become irrelevant. Organizations are racing to understand their customers' behavior and attitudes so they can meet their needs and earn their business. Because of growing customer expectations and increased pressure from competitors, organizations are starting to invest in user research early and often throughout development and beyond.

In this fourth annual UX and User Research Industry Survey, we asked 2,238 professionals across a wide variety of industries how their organizations are approaching user experience and conducting user research.

Here are the responses and key insights from this year's survey.

1. What is your gender?

51%
FEMALE

48%
MALE

1%
DIDN'T SAY

2. What is your age?

13%	40%	29%	17%	0.3%	1%
18 - 25	26 - 34	35 - 45	46 - 69	70 +	RATHER NOT SAY
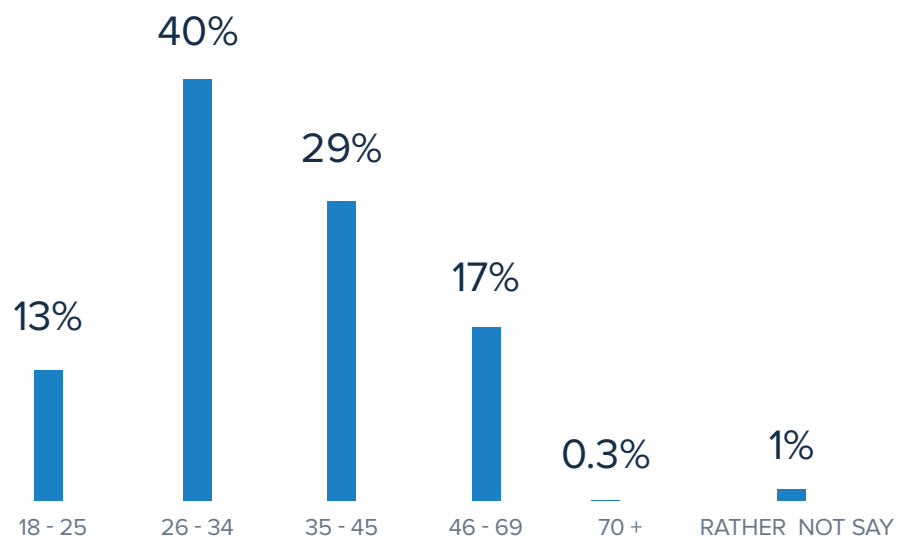
3. What is your country of residence?

57%	UNITED STATES
21%	OTHER
7%	UNITED KINGDOM
5%	CANADA
4%	INDIA
2%	GERMANY
2%	SPAIN
1%	AUSTRALIA
1%	FRANCE
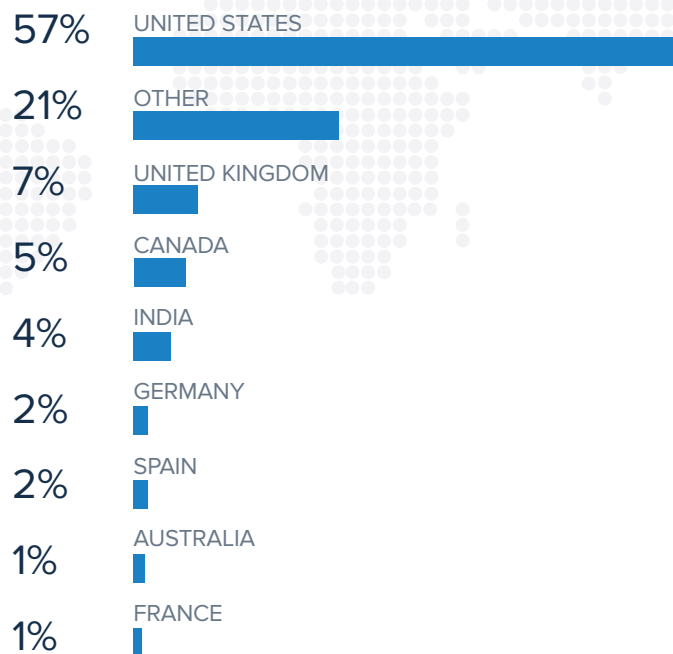
4. What's the highest level of education you've achieved?

- LESS THAN HIGH SCHOOL
- HIGH SCHOOL/GED
- SOME COLLEGE
- 2-YEAR COLLEGE/ASSOCIATE'S DEGREE
- 4-YEAR COLLEGE/ BACHELOR'S DEGREE
- MASTER'S DEGREE
- DOCTORAL DEGREE
- PROFESSIONAL DEGREE
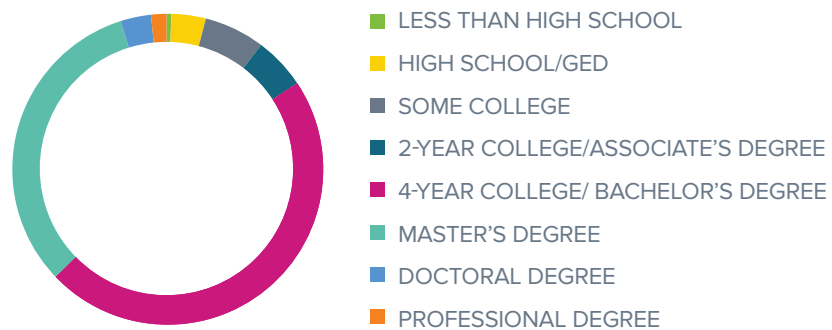
5. Which of the following best describes the principal industry of your organization?

%	Industry
19%	BUSINESS HIGH TECH SERVICES & SOFTWARE (E.G. BOX)
12%	ADVERTISING & MARKETING
12%	CONSUMER HIGH TECH SERVICES & SOFTWARE (E.G. GOOGLE)
7%	FINANCE & FINANCIAL SERVICES
7%	EDUCATION
6%	RETAIL
6%	HEALTHCARE & PHARMACEUTICALS
6%	OTHER
4%	MEDIA
3%	TRAVEL / LEISURE / HOSPITALITY
3%	BUSINESS SUPPORT & LOGISTICS
3%	TELECOMMUNICATIONS
2%	CONSUMER GOODS (BRANDS)
2%	NONPROFIT
2%	GOVERNMENT
2%	VIDEO & MOBILE GAMING
2%	INSURANCE
2%	MANUFACTURING

6. How many people are employed at your company?

1 - 10	11 - 100	101 - 500	501 - 1000	1001 - 5000	5001 +
18%	25%	19%	7%	13%	18%
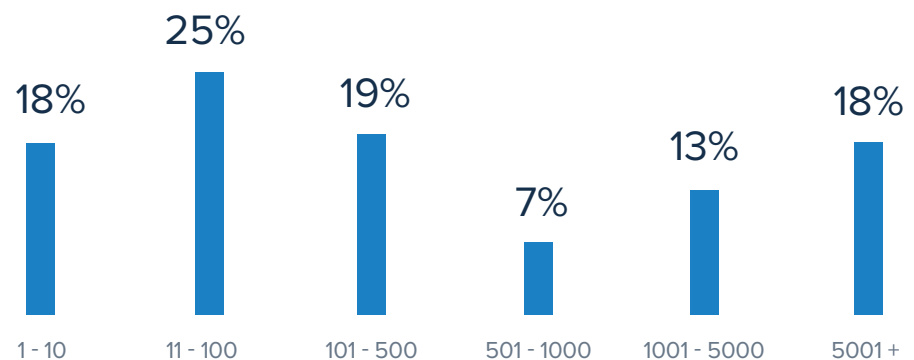
7. Which of these choices best describes your role?

- IN-HOUSE
- CONSULTANT AT AN AGENCY
- INDEPENDENT CONSULTANT / FREELANCE
- BUSINESS OWNER

67%
14%
9%
10%
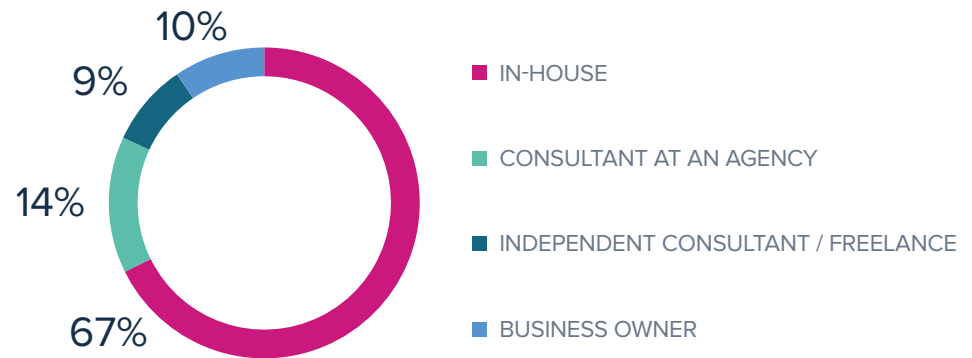
8. What level of seniority is your role?

INDIVIDUAL CONTRIBUTOR	MANAGER	DIRECTOR	VICE PRESIDENT	C-LEVEL/SENIOR EXECUTIVE
54%	25%	11%	2%	8%
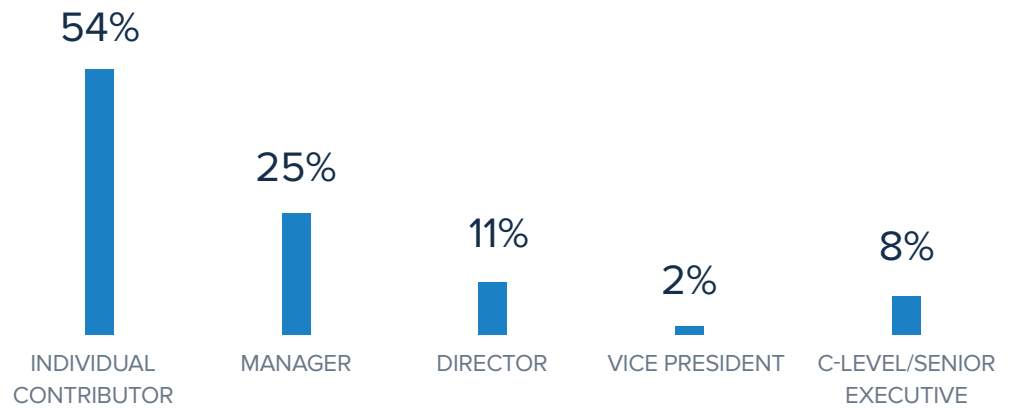
9. What is your primary job function?

38% DESIGN/UX

20% RESEARCH

12% OTHER
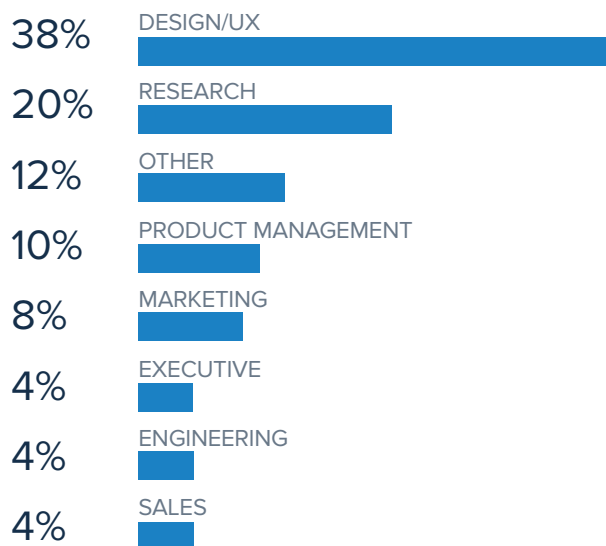
10% PRODUCT MANAGEMENT

8% MARKETING

4% EXECUTIVE

4% ENGINEERING

4% SALES

10. At what stages of development do you (or your team) conduct user research? Select all that apply.

72%	76%	38%	48%	52%
BEFORE BEGINNING ANY DESIGN OR DEVELOPMENT	DURING THE DESIGN/ PROTOTYPING PHASE	DURING THE DEVELOPMENT/ CODING PHASE	AFTER DEVELOPMENT IS COMPLETE, BEFORE LAUNCHING	AFTER LAUNCHING
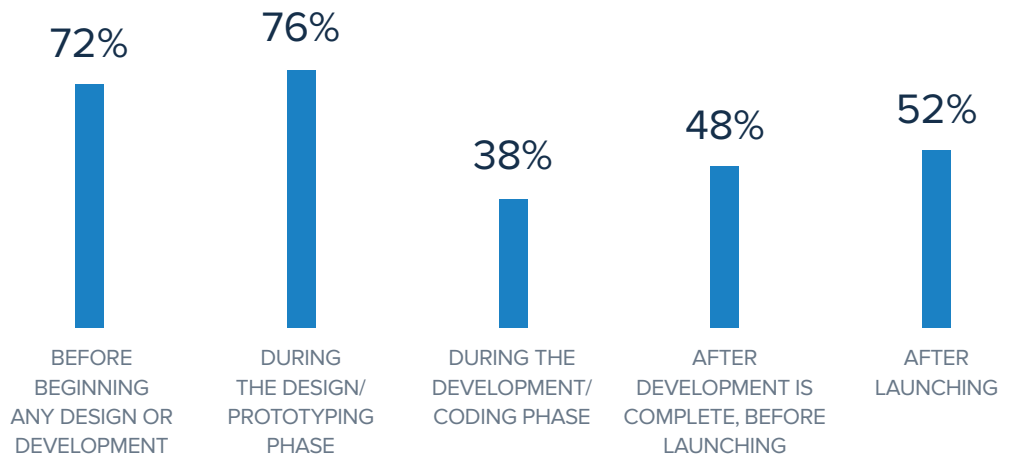
Traditionally, product teams occasionally performed exploratory research using methods like in-person interviews and focus groups prior to the design phase, and then they ran usability tests immediately before or after launch. These days, however, there's a shift toward getting user insights earlier and more frequently during development. Product teams are finding that continuous user feedback during the prototyping phase helps them refine their concepts quickly before investing in development. This ultimately saves them the time, cost, and hassle of doing rework—and it helps to ensure product adoption.

Organizations are also pursuing more early-stage research before they even develop a product concept, looking to their target users to identify needs in the market. There's a growing interest in testing to understand users' needs and attitudes, not just their ability to use an interface. In addition, companies are incorporating more frequent competitive research to understand customer expectations and benchmarking to measure the impact of changes to the customer experience.

11. How does your team use the results of your user research?

87% UNDERSTAND CUSTOMER NEEDS AND ATTITUDES

72% TEST PROTOTYPES OR WIREFRAMES

53% EDUCATE UPPER MANAGEMENT OR OTHER STAKEHOLDERS

50% TEST SKETCHES OR CONCEPTS

42% SETTLE DISPUTES WITHIN THE TEAM

35% VALIDATE CHANGES WITHIN SPRINTS

31% ENHANCE OR PRIORITIZE A/B TESTS

23% EXPLAIN TRENDS IN OUR ANALYTICS

5% TEST APP STORE LISTINGS
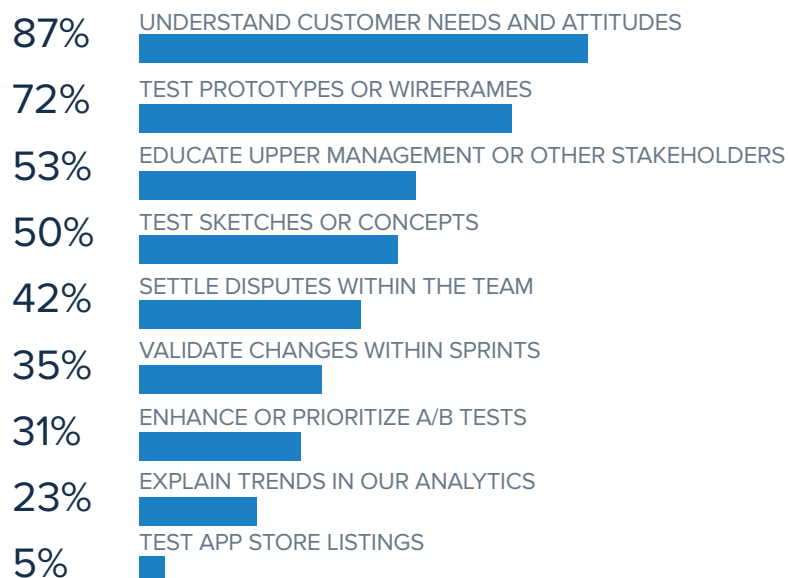
12. How does your team review the results of your usability tests?

55% — 1+ PEOPLE ON THE TEAM REVIEW RESEARCH AND REPORT TO REST OF THE TEAM

36% — TEAM REVIEWS RESEARCH TOGETHER

6% — ANOTHER TEAM IN THE ORGANIZATION REVIEWS RESEARCH AND SENDS US A REPORT

3% — OTHER

13. Please indicate how strongly you disagree or agree with the following statements:

- ■ USER RESEARCH MAKES OUR COMPANY MORE EFFICIENT
- ■ USER RESEARCH IMPROVES THE QUALITY OF OUR PRODUCTS/SERVICES
- ■ I WANT TO ENABLE MORE PEOPLE IN THE COMPANY TO DO USER RESEARCH
- ■ VOICE OF THE CUSTOMER IS AN IMPORTANT FACTOR IN OUR DECISIONS

56%
56%
49%
46%

STRONGLY DISAGREE | DISAGREE | SOMEWHAT DISAGREE | SOMEWHAT AGREE | AGREE | STRONGLY AGREE

Whereas user experience used to be relegated to one or two designers within a company, it's now becoming a way of life for forward-thinking organizations. Executive support for UX, user research, and end-to-end customer experience is on the rise. Business leaders who have invested in UX are realizing the ROI of their user research dollars. Buy-in from the C-suite could be one reason for the growing user research budgets we've seen in this survey over the last four years.

Tangible change in organizations' approach to user experience can take time, especially in larger and more established companies. Still, this attitude indicates that businesses are growing more mature from a UX standpoint.
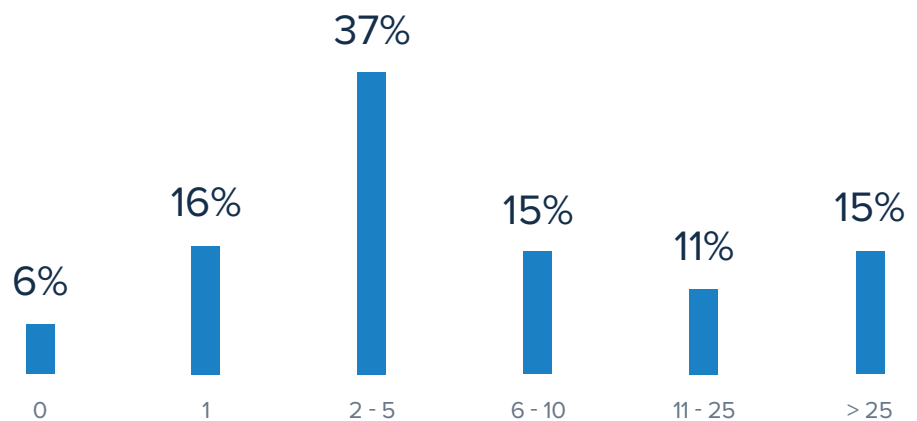
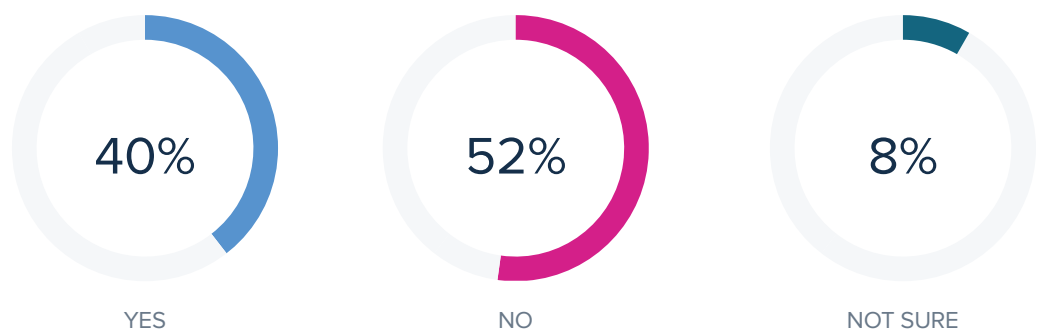## 14. Please indicate how strongly you disagree or agree with the following statements:

- **■** WHEN THE CUSTOMER EXPERIENCE IS BAD, MARKETING GETS BLAMED
- **■** USER RESEARCH HELPS US CREATE EFFECTIVE MARKETING CAMPAIGNS.

48%

29%

STRONGLY DISAGREE	DISAGREE	SOMEWHAT DISAGREE	SOMEWHAT AGREE	AGREE	STRONGLY AGREE
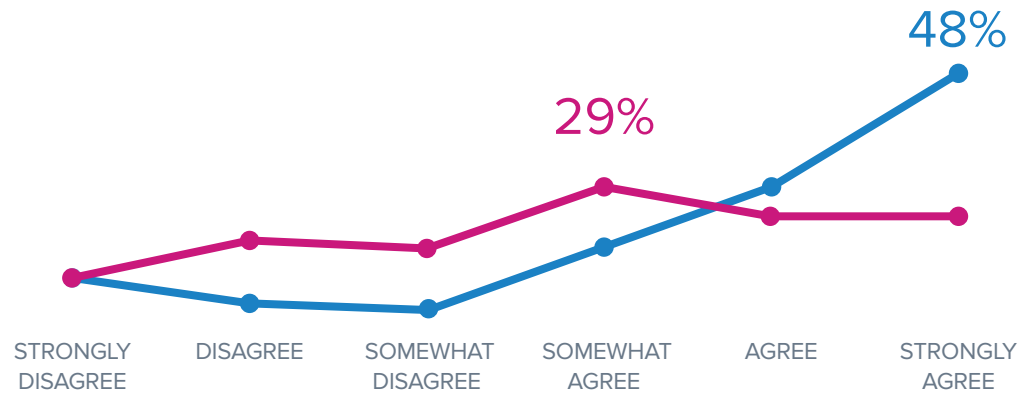
15. How many people in your company, part-time and full-time, work on user experience?

37%

16%

15%

6%

11%

15%

0	1	2 - 5	6 - 10	11 - 25	> 25

16. Does your company have a dedicated team for UX research?

40%

52%

8%

YES	NO	NOT SURE

17. Which team in your company finds the most value in user research?

Team	Percentage
UX	35%
PRODUCT	26%
MARKETING	15%
NOT SURE	13%
OTHER	7%
ENGINEERING	5%
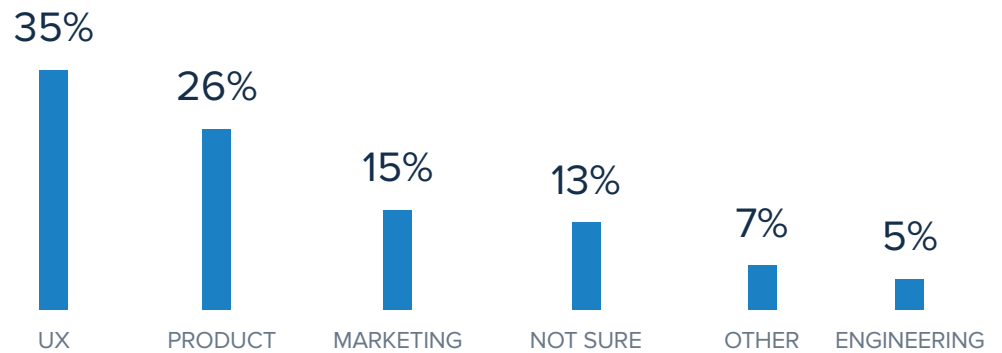
18. Which team is ultimately responsible for the customer experience at your company?

Team	Percentage
UX	30%
PRODUCT	25%
MARKETING	13%
OTHER	11%
NOT SURE	11%
EXECUTIVE	10%
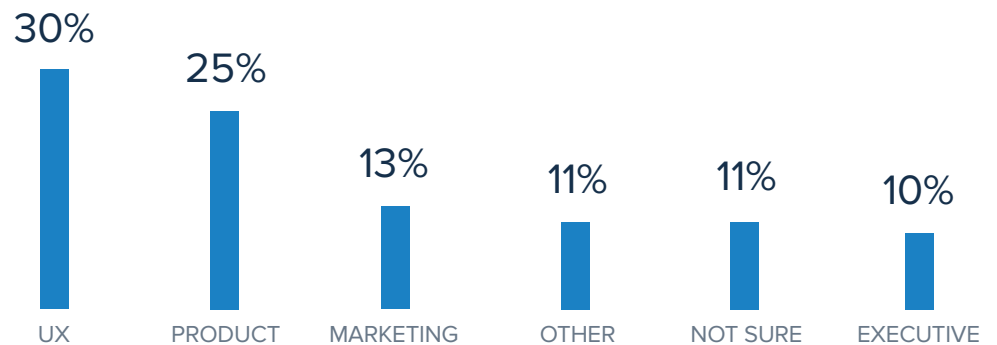
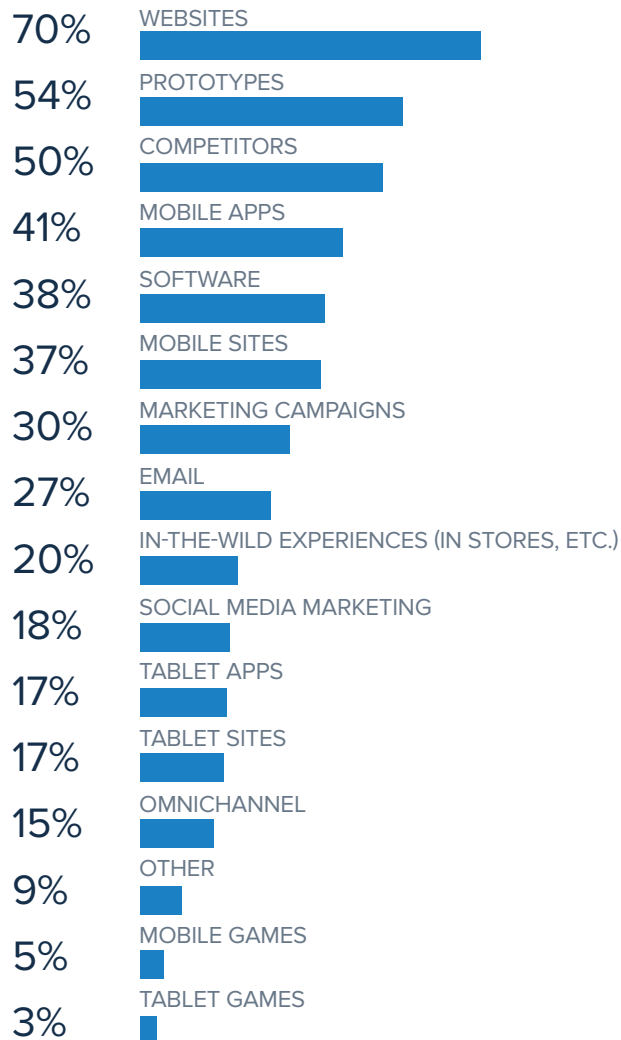## 19. Please indicate how strongly you disagree or agree with the following statements:

- OUR OVERALL CUSTOMER EXPERIENCE IS VERY GOOD
- IT'S EASY FOR US TO OPTIMIZE ALL OF THE ELEMENTS IN OUR CUSTOMER EXPERIENCE
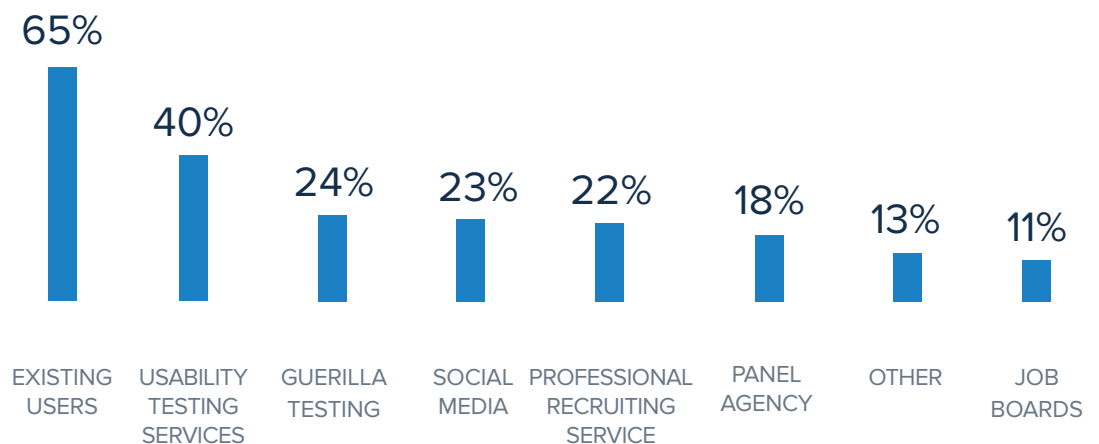- WE UNDERSTAND OUR CUSTOMERS' JOURNEYS ACROSS ALL DEVICES AND DISTRIBUTION CHANNELS

29% 28% 24%

STRONGLY DISAGREE | DISAGREE | SOMEWHAT DISAGREE | SOMEWHAT AGREE | AGREE | STRONGLY AGREE
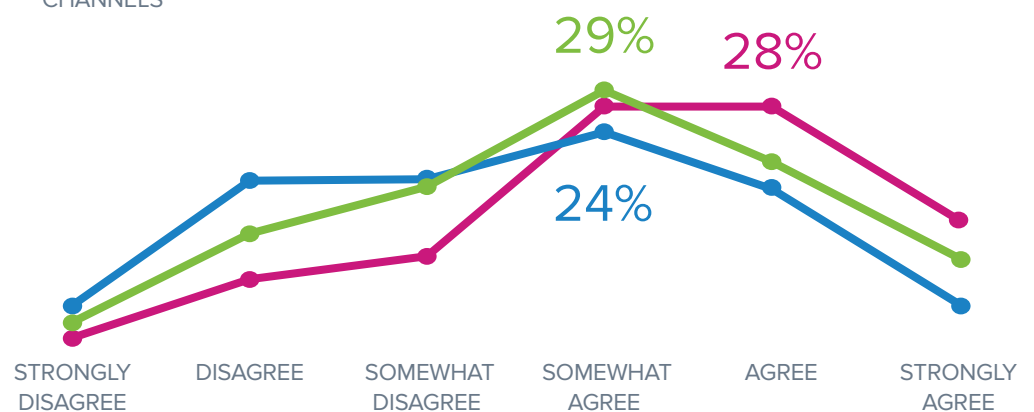
The number of respondents who do user research on their competitors more than doubled year-over-year.

20. What does your company currently do user research on? Select all that apply.

70%	WEBSITES
54%	PROTOTYPES
50%	COMPETITORS
41%	MOBILE APPS
38%	SOFTWARE
37%	MOBILE SITES
30%	MARKETING CAMPAIGNS
27%	EMAIL
20%	IN-THE-WILD EXPERIENCES (IN STORES, ETC.)
18%	SOCIAL MEDIA MARKETING
17%	TABLET APPS
17%	TABLET SITES
15%	OMNICHANNEL
9%	OTHER
5%	MOBILE GAMES
3%	TABLET GAMES

21. How does your company recruit participants for your user research? Select all that apply.

65%	40%	24%	23%	22%	18%	13%	11%
EXISTING USERS	USABILITY TESTING SERVICES	GUERILLA TESTING	SOCIAL MEDIA	PROFESSIONAL RECRUITING SERVICE	PANEL AGENCY	OTHER	JOB BOARDS

22. What percent of your time is spent conducting usability tests?

10%	67%	16%	5%	2%
0%	1 - 25%	26 - 50%	51 - 75%	76 - 100%

23. What percentage of your company's usability testing is done remotely/online?

				26%
0%	1 - 25%	26 - 50%	51 - 75%	76 - 100%

24. What percentage of your company's remote usability testing is moderated?

29%	28%	14%	10%	19%
0%	1 - 25%	26 - 50%	51 - 75%	76 - 100%
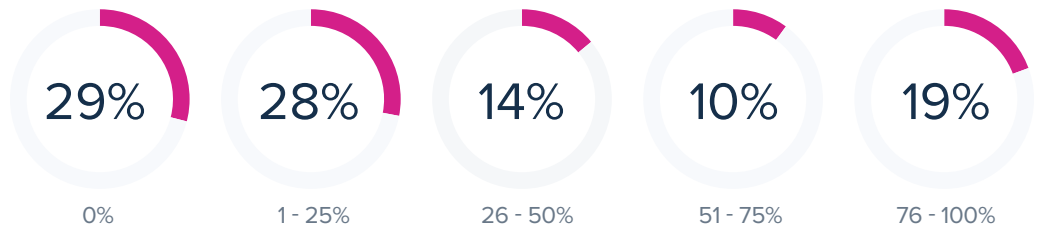
25. On average, how many users does your company recruit per usability study?

33%	41%	14%	5%	3%	1%	1%	2%
1 - 5	6 - 10	11 - 20	21 - 50	51 - 100	101 - 200	201 - 500	500 +
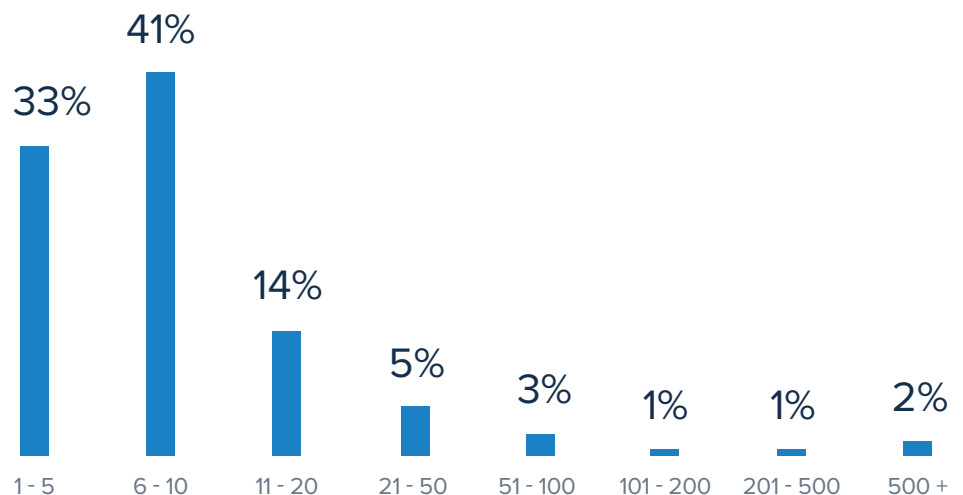
26. On average, what is your company's monthly budget for user research?

Category	Percentage
NO FIXED BUDGET	40%
0	7%
$1 - $500	11%
$501 - $1,000	5%
$1,001 - $5,000	7%
$5,001 - $10,000	4%
$10,001 - $50,000	3%
$50,001 +	2%
NOT SURE	22%
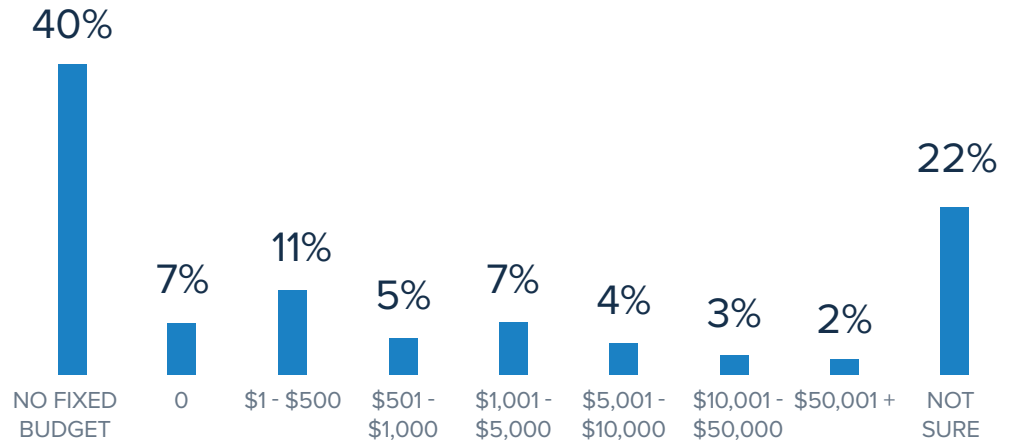
27. How would you compare your company's user research budget in 2016 to 2015?
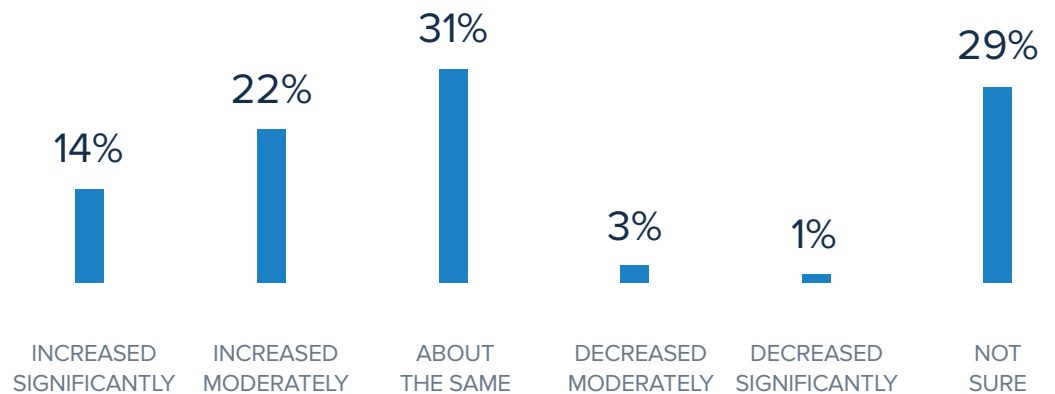
Category	Percentage
INCREASED SIGNIFICANTLY	14%
INCREASED MODERATELY	22%
ABOUT THE SAME	31%
DECREASED MODERATELY	3%
DECREASED SIGNIFICANTLY	1%
NOT SURE	29%

28. What was the reason for the change in your company's user research budget?

- 11% INCREASE OR DECREASE IN PROJECTS
- 27% CHANGE IN ATTITUDE TOWARD UX RESEARCH
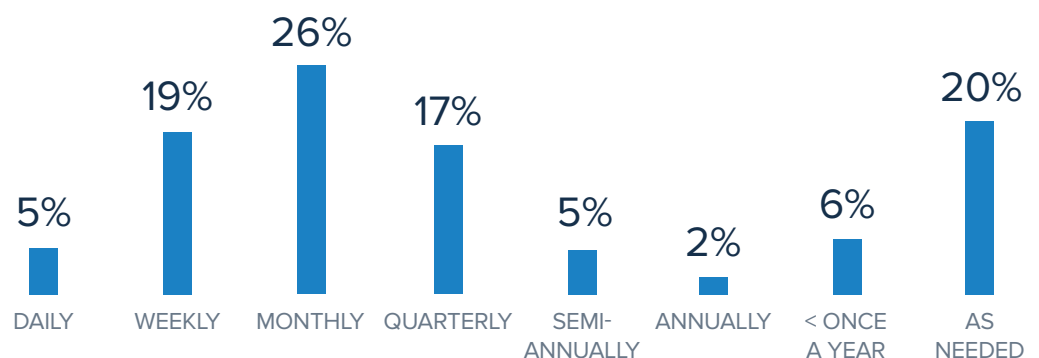- 7% INCREASE OR DECREASE IN PERSONNEL
- 47% NO CHANGE
- 8% OTHER
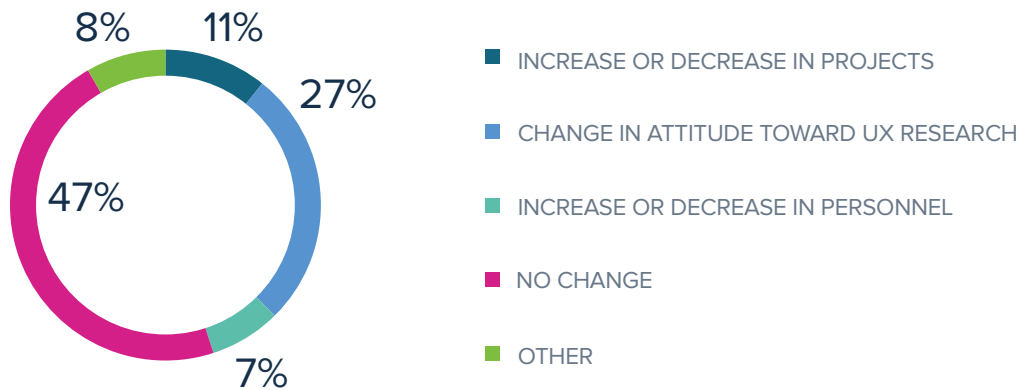
29. Out of the budget you just indicated, which of the following methodologies do you invest in? *(Select all that apply.)*

79%	USABILITY TESTING
65%	SURVEYS
59%	INTERVIEWS
31%	CARD SORTING
30%	FIELD STUDIES
28%	FOCUS GROUPS
22%	FIRST CLICK TESTING
21%	PREFERENCE TESTING
18%	TREE TESTING
14%	DIARY STUDIES
11%	TABLET APPS
8%	LONGITUDINAL STUDIES
7%	OTHER
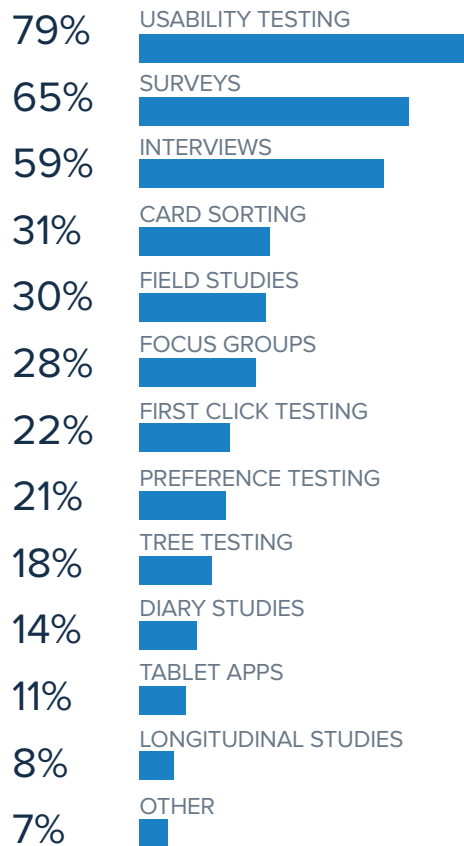
A well-rounded research strategy includes a variety of methodologies, including qualitative, quantitative, attitudinal, and behavioral research. Organizations that diversify their data sources end up with a more complete picture of their user experience than organizations that stick with only one method.
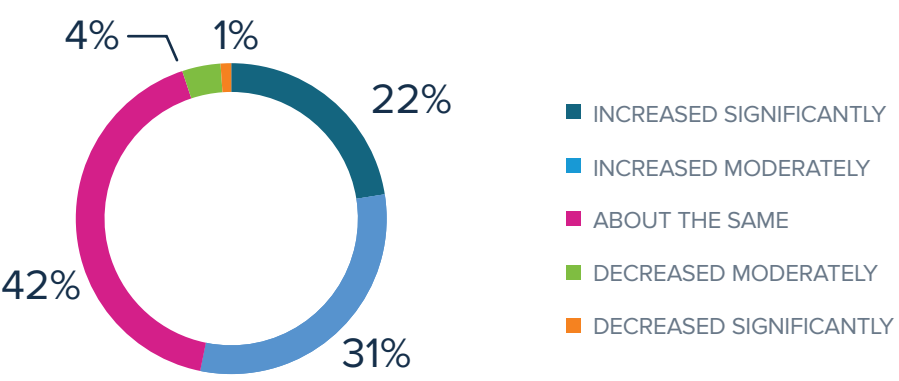
This year, the majority of survey respondents indicated that they invest in three or more of these research methodologies. The fact that so many respondents have the bandwidth and resources to invest in multiple methodologies indicates that companies are maturing their user experience and customer experience practices.

30. How frequently does your company run usability tests?

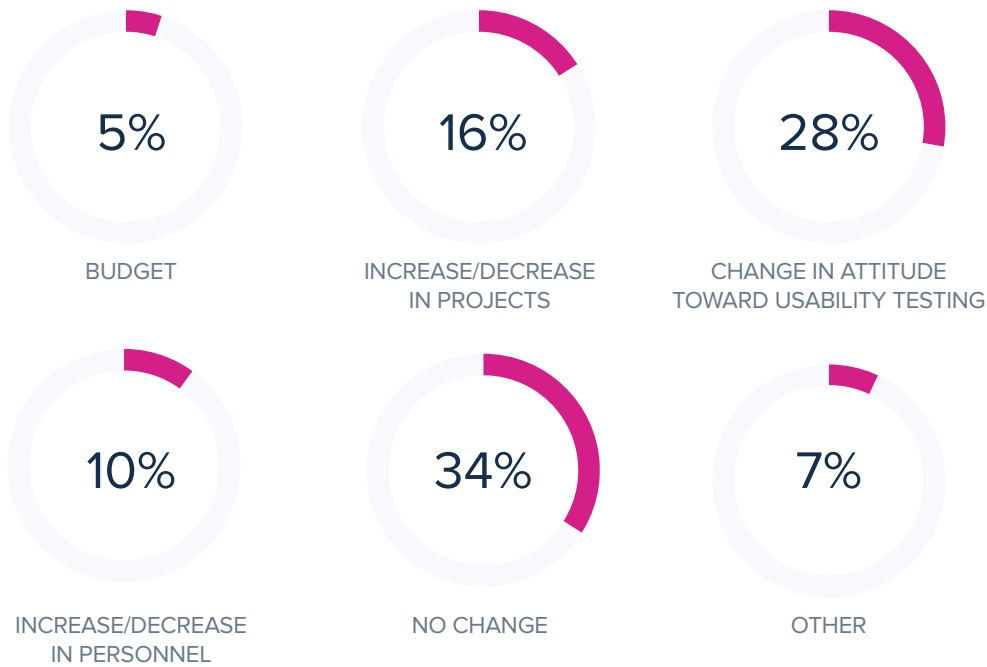| DAILY	WEEKLY	MONTHLY	QUARTERLY	SEMI-ANNUALLY	ANNUALLY	< ONCE A YEAR	AS NEEDED
5%	19%	26%	17%	5%	2%	6%	20%

For the fourth year in a row, the majority of our survey respondents reported that their testing frequency has increased moderately or significantly.
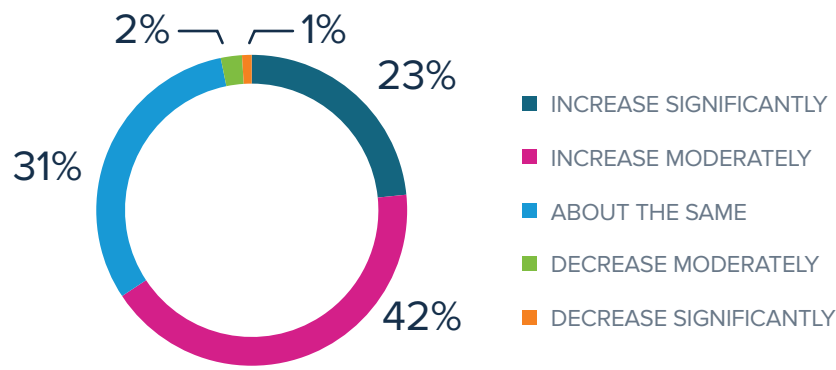
31. How does the frequency of your company's usability testing in 2016 compare to 2015?

4% — 1%
22%
42%
31%

- INCREASED SIGNIFICANTLY
- INCREASED MODERATELY
- ABOUT THE SAME
- DECREASED MODERATELY
- DECREASED SIGNIFICANTLY

32. What was the reason for the change in your company's usability testing frequency?

5%
BUDGET

16%
INCREASE/DECREASE IN PROJECTS

28%
CHANGE IN ATTITUDE TOWARD USABILITY TESTING

10%
INCREASE/DECREASE IN PERSONNEL

34%
NO CHANGE

7%
OTHER

33. Looking ahead into 2017, how do you think the frequency of your company's usability testing will change?

2% — 1%
23%
31%
42%

- INCREASE SIGNIFICANTLY
- INCREASE MODERATELY
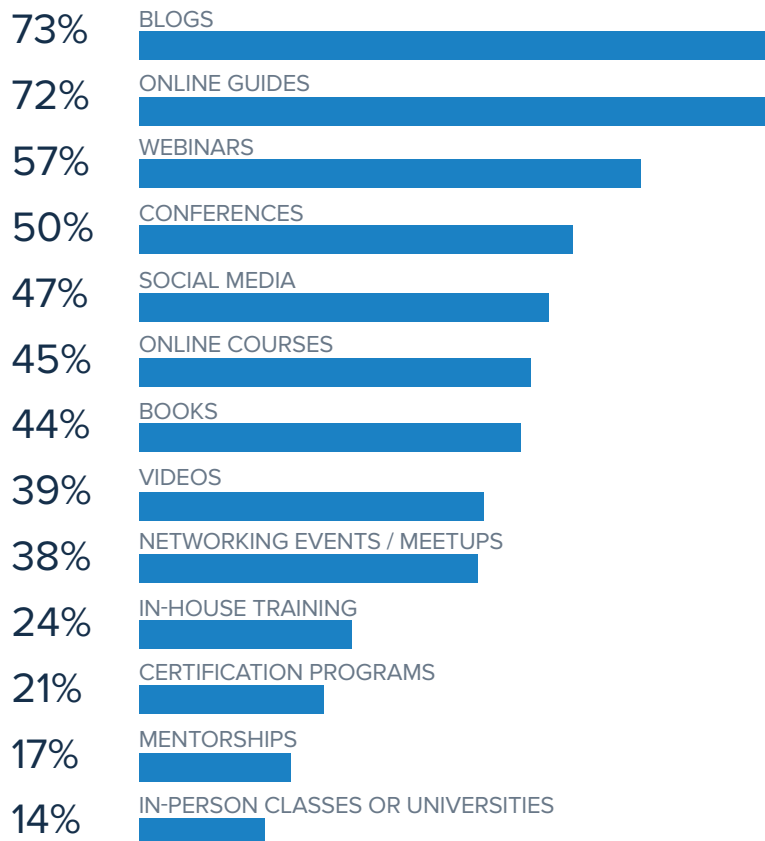- ABOUT THE SAME
- DECREASE MODERATELY
- DECREASE SIGNIFICANTLY

34. When launching a new digital product (website, mobile app, feature, etc.), describe your greatest concerns. What keeps you up at night as you get ready to launch?
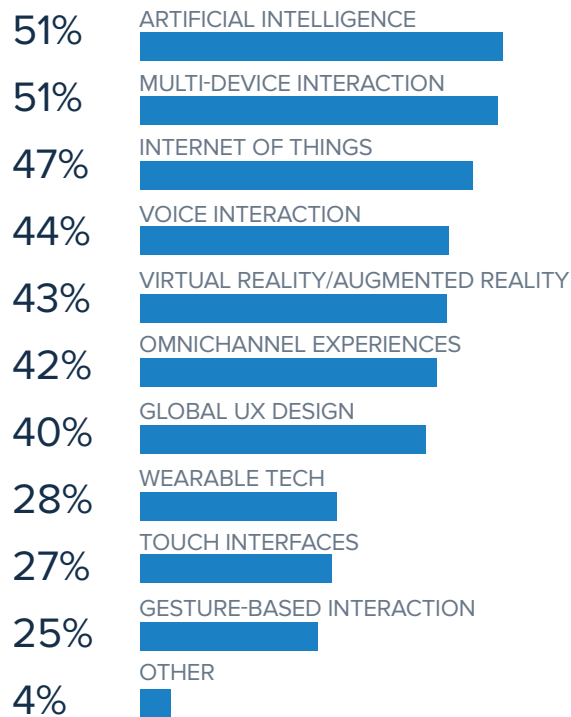
Note: This was an open response question. Below are the top five most common responses based on text analysis.

- USERS' UNDERSTANDING OF THE PRODUCT
- KPIS AND BUSINESS METRICS
- NOT ENOUGH RESEARCH/TESTING
- BUGS AND TECHNICAL PERFORMANCE
- PRODUCT-MARKET FIT

35. What sources do you use to improve your user experience knowledge? Select all that apply.

73%	BLOGS
72%	ONLINE GUIDES
57%	WEBINARS
50%	CONFERENCES
47%	SOCIAL MEDIA
45%	ONLINE COURSES
44%	BOOKS
39%	VIDEOS
38%	NETWORKING EVENTS / MEETUPS
24%	IN-HOUSE TRAINING
21%	CERTIFICATION PROGRAMS
17%	MENTORSHIPS
14%	IN-PERSON CLASSES OR UNIVERSITIES

36. What do you think will be the most important online trends affecting user experience in the next 5 years?

51%	ARTIFICIAL INTELLIGENCE
51%	MULTI-DEVICE INTERACTION
47%	INTERNET OF THINGS
44%	VOICE INTERACTION
43%	VIRTUAL REALITY/AUGMENTED REALITY
42%	OMNICHANNEL EXPERIENCES
40%	GLOBAL UX DESIGN
28%	WEARABLE TECH
27%	TOUCH INTERFACES
25%	GESTURE-BASED INTERACTION
4%	OTHER

What once seemed like science fiction is now top-of-mind for leading companies. Artificial intelligence, virtual/augmented reality, and voice interaction are three top trends that made headlines in the past year, and organizational leaders are rushing to determine how those technologies will impact their business. Meanwhile, the now-commonplace trends of touch interfaces and wearable technology have dropped in importance year-over-year among survey respondents.

Notably, multi-device interaction and omnichannel experiences have remained high on the list over the last two years. This indicates that businesses are anticipating a more connected world in which they will need to meet the needs of their customers and provide a consistent experience across multiple channels if they want to remain competitive.

Conclusion

This year's survey responses indicate a positive trend toward early, frequent research throughout the design, development, and optimization of digital products. Instead of relying on internal opinions, organizations are bringing the voice of the customer to their decision-making process from the earliest stages of product development. The result? More customer-centered products, better user experiences—and an increasingly competitive market in which companies that don't invest in UX become extinct.

Create great experiences

UserTesting is the fastest and most advanced user experience research platform on the market. We enable product managers, UX researchers and designers, and digital executives to create better customer experiences.

More than 35,000 companies leverage UserTesting to deploy actionable customer insights throughout the design and development of prototypes, websites, mobile apps, and more.

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