The 2018 UX INDUSTRY Report

Presented by Loop11

Introduction

The 2018 UX Industry Study was run from November 2017 to February 2018. Participants were recruited through industry newsletters, large online communities and social media. The vast majority of participants came through third party channels not affiliated with Loop[11]. Over 750 respondents participated in the study.

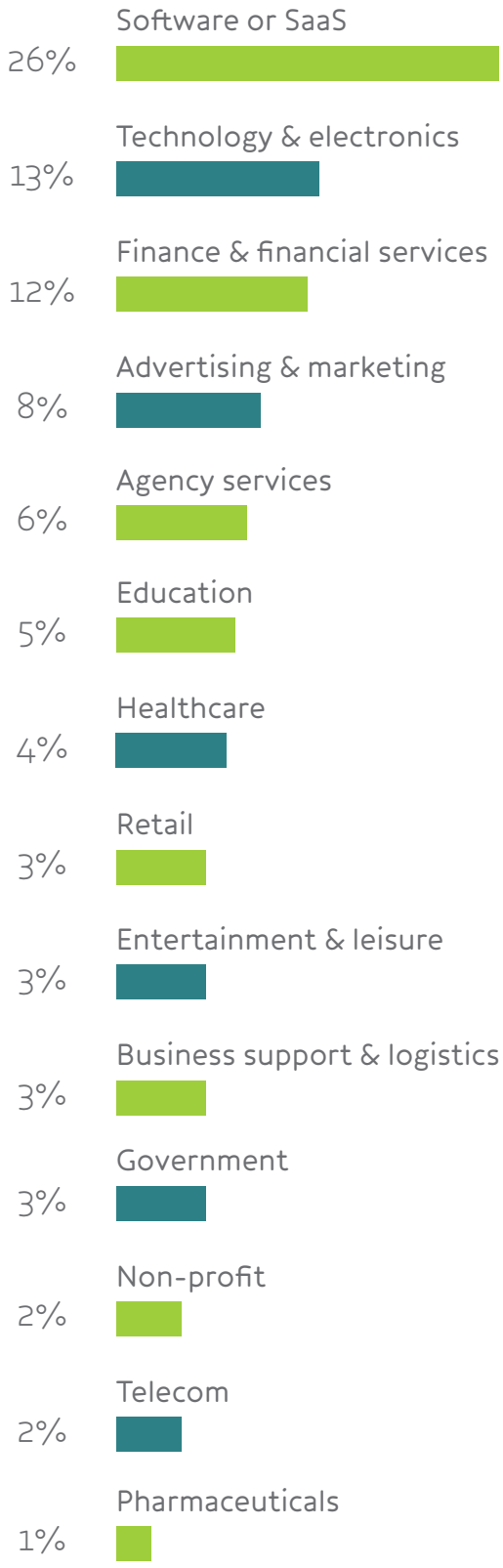
Our intention was to sample a significant cross section of the global user experience and design community. A noted limitation of this study was that it was only in English and required at least 15 minutes to complete which caused consternation amongst some. Despite this, 52 countries are represented in the sample.

With a wide array of questions our goal was to take the pulse of the UX industry, it's changing perceptions, tools, information sources, trends and key measures such as salary.

The first question in the survey was an open ended response which asked the participant for their definition of UX. Our summary is on the following page.

An interesting result to come out of the study was that "UX Research" was the most participated task (page 7) yet, for the second year running, "determining a research plan" (page 10) was the area of least confidence in terms of execution and the top rated skill valued in a graduate (page 22) was "research and analysis experience". This raises the question, that while the importance of research is understood, why does the community at large lack confidence in its execution and how can this be addressed? Page 23 contains a summary of areas of further study respondents reported having a desire to participate in.

Industries Represented



What is Your Definition of UX?

There are two basic streams in how the survey respondents went about giving their definition of UX. In some cases respondents embraced both streams.

The first stream focused solely upon the user (or customer):

28% consider UX as referring to all the touch points or experiences a user has with a product, service or interface.

14% simply described UX as the 'user experience', sometimes going on to mention contact points or interactions.

13% believe UX refers to the emotions and attitudes a user displays or feels about a product, service or interface.

The second stream of definitions dealt with the processes an organization might employ in creating products, services or interfaces.

19% feel that UX is a series of methodologies aimed at understanding the users and their requirements, then designing responses to satisfy them.

15% simply stated that UX is the aim to fulfill users' needs.

9% felt that UX is focused upon user experiences within digital interfaces.

The majority (67%) felt there had been at least some change or evolution in their definition of UX in the past 12 months. A tenth (11%) felt the change had been significant.

What do you believe today about UX which you didn't believe or understand 12 months ago?

The range of "beliefs" about changes in their understanding of UX were quite differently expressed. The most common themes on their belief changes were:

17% thought that UX is a broader concept than they previously recognized, covering a variety of dimensions.

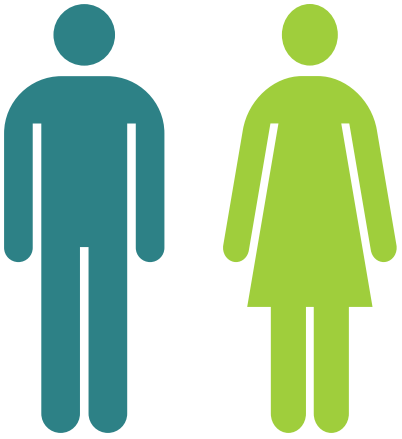
17% now have a much greater appreciation for the need to have the user at the center of the design process.

11% spoke about an understanding of how important it is to educate those in their organization about UX in order to generate a greater understanding.

10% talked about a new found appreciation of the need to recognize business requirements within their organization.

Respondent Profile

Respondents came from 52 countries this year, up from 44 in 2017. Of these, 33% of respondents were located outside of the top 5 countries. Compared to last year only 23% were from outside the top 5 countries. This year 47% were from North America, 31% from Europe and 17% from Asian/Pacific countries. The age range has become more focused within the 25 - 44 range, increasing from 66% 2017 to 72% of respondents, with all other ages decreasing.



In the 2017 study men accounted for 52% of participants.

United States 43%

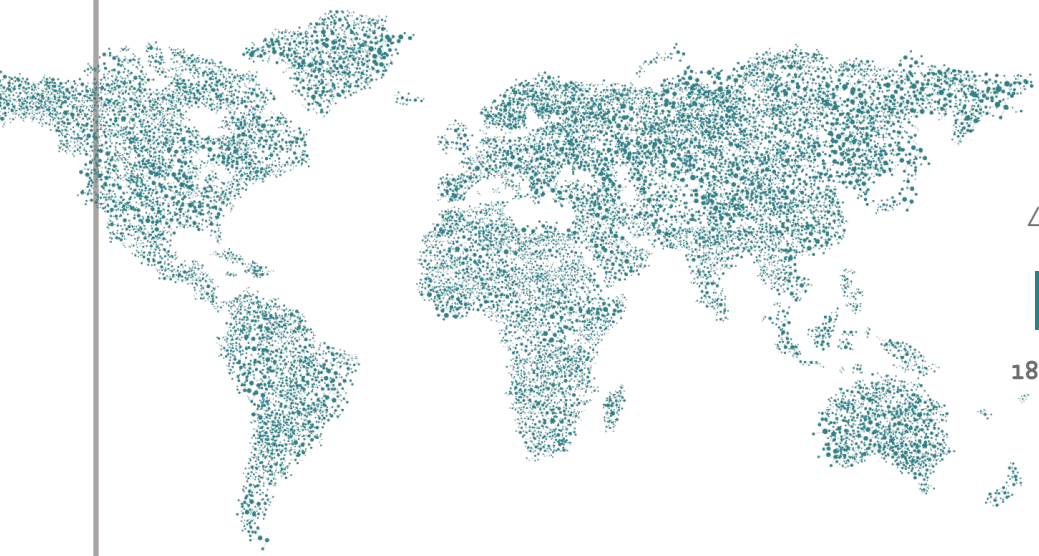
United Kingdom 7%

Australia 7%

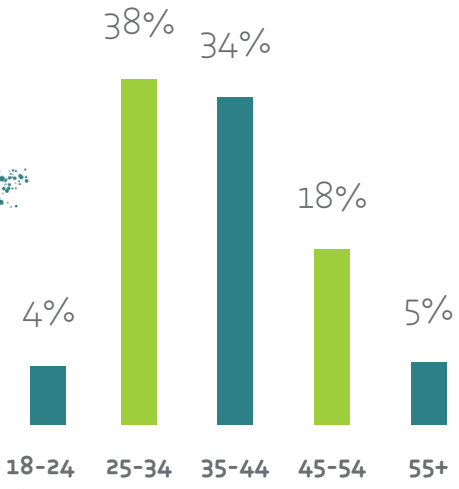
India 6%

Canada 4%

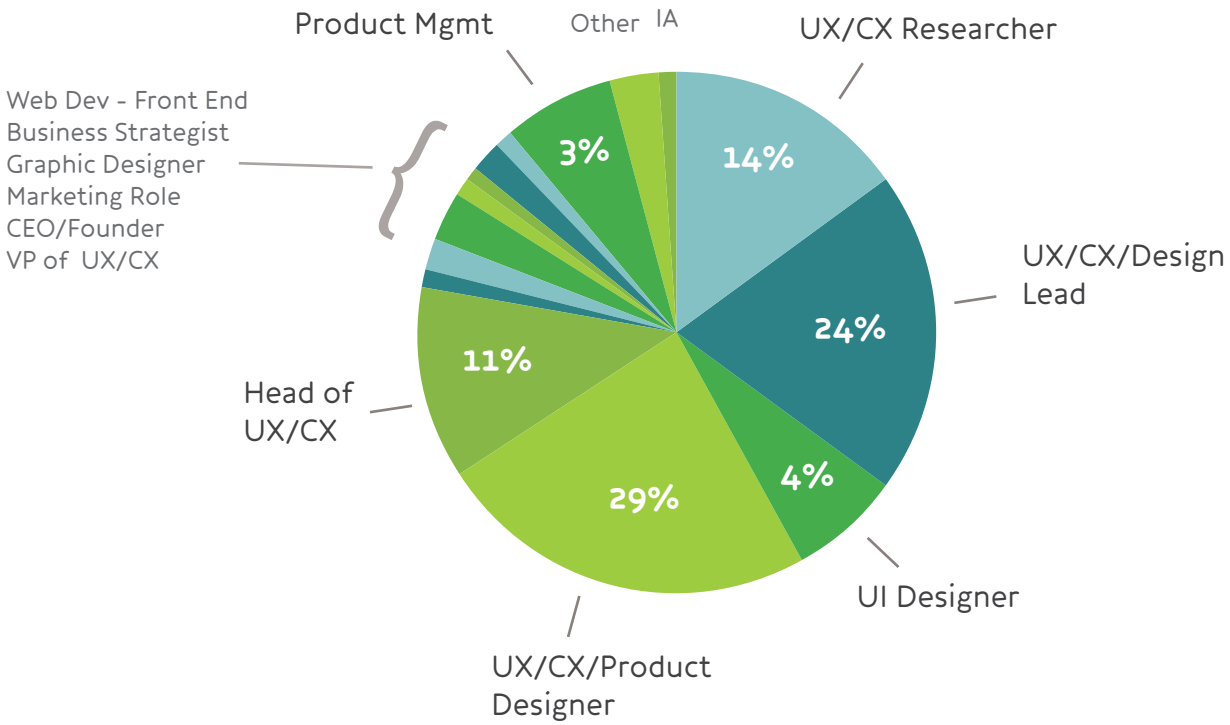
Germany 4%



Age

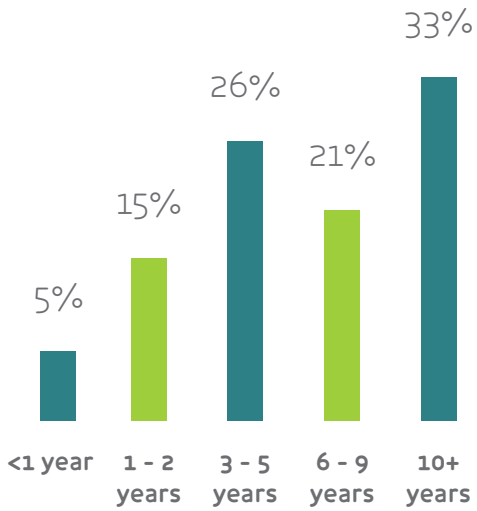


Respondent Profile continued



Company Size

Years in UX



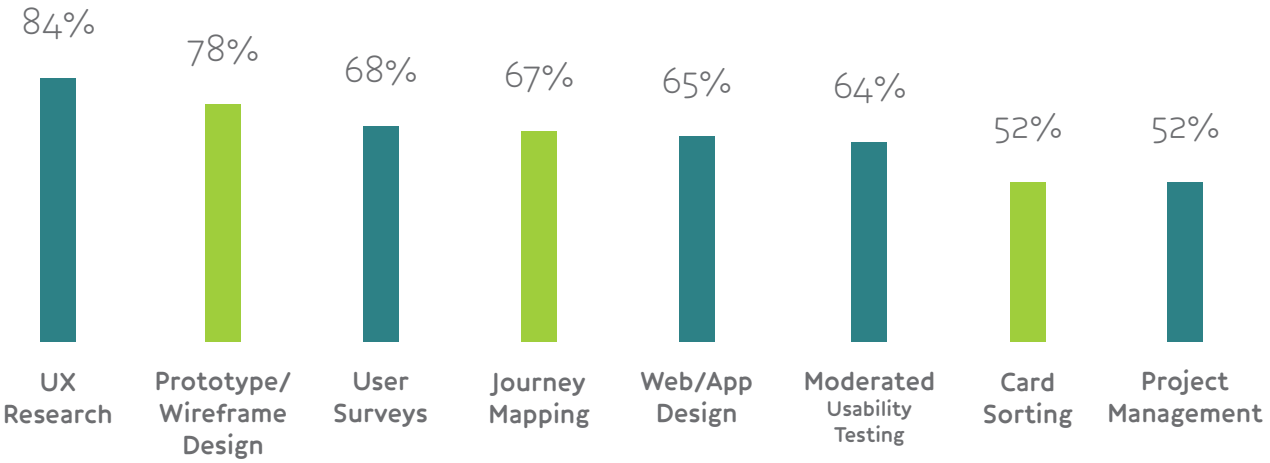
Respondent Profile continued

In 2018 we have a greater number of respondents in medium sized companies with those over 1,000 employees decreasing from last years 37% representation to 31% this year, and 1 to 10 person companies decreasing from 11% to 7%. The greatest increase was seen in 101 to 500 employee companies rising from 17% in 2017 to 24% of respondents in 2018.

We also saw a general evening of experience in terms of years within UX, however, the order remained unchanged from 2017 with 10+ being the most represented category and under 1 year being the least represented

In terms of roles, we saw an 8% increase in respondents identifying as a UX/CX/ Product designer. All other major categories decreased slightly.

Which of the following tasks are you involved with in your role?

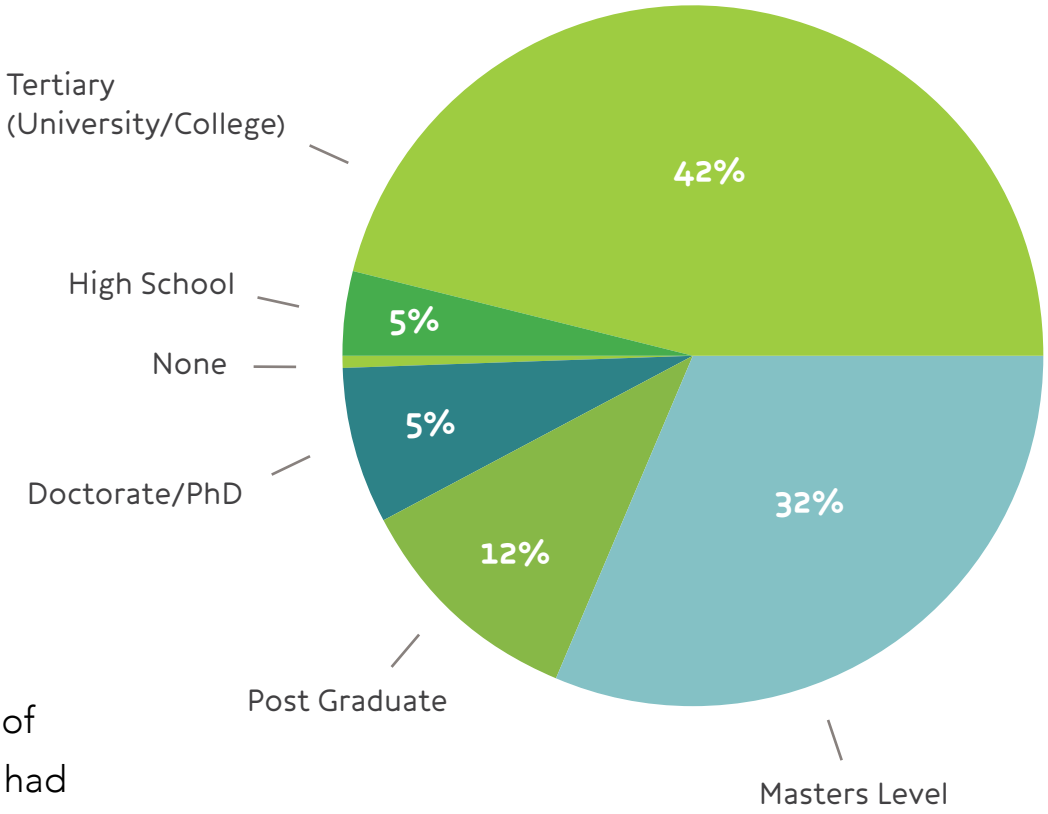


Looking at the changes between roles reported in 2017 versus 2018, 'Website/App Design' increased the most (**+14%**), followed by 'Moderated Usability Testing' (**+6%**), 'UX Research' (**+4%**), 'User Surveys' (**+4%**) and 'Prototype/Wireframe design' (**+3%**).

Respondent Education

Respondents appear to be quite highly educated. Females were significantly more likely than males to have masters level qualifications .

What is the highest level of education have you completed?



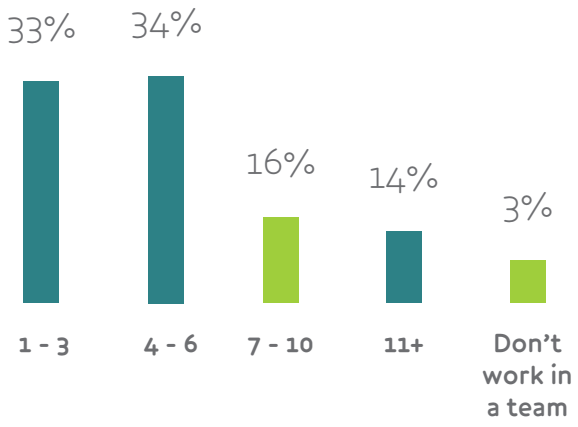
The great majority of respondents (77%) had received UX specific training in their education. Some had received it from multiple sources, 31% mentioned short courses, 36% as a part of a tertiary qualification and 20% had training within "my company". However, nearly one quarter (23%) stated they had not had any such training.

Respondent Teams

The average size of a team approximates 6 - 7 members. Two thirds of teams had 6 or less members.

Comparing 2018 to 2017 there was an increase in all team sizes except for those in the 4 – 6 member range which saw a 7% decrease. Most of it's decrease appears to have been picked up by 1 – 3 member range which increased by 6%.

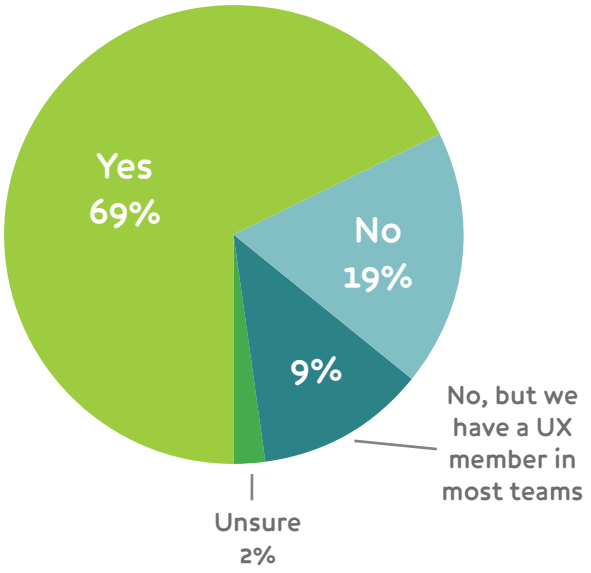
Team Size



Dedicated Usability or UX Teams

Nearly seven in ten (69%) of the respondents claim their company has "dedicated usability teams for usability or UX testing". A further 9% have a "UX member in most teams".
A fifth (19%) claim "not to have dedicated teams". Publicly listed companies were especially likely to have such teams (84%). Agencies were the most likely to not have a team, but rather have a UXer embedded in teams.

Dedicated Usability / UX Team



Methodology Used by Teams

The dominant framework used by teams was ***Scrum*** (Agile) at 37% followed by it's cousin ***Kanban*** (Agile) 16%. ***Lean*** came in third at 14%, 7% nominated ***Waterfall*** while another 6% nominated ***other.*** Within the ***others*** many noted "Agile-fall", stating their company's failure to execute Agile and thus falling into Waterfall practices. 10% said they weren't sure of their methodology while a further 8% said it depended on the job, predominantly agencies.

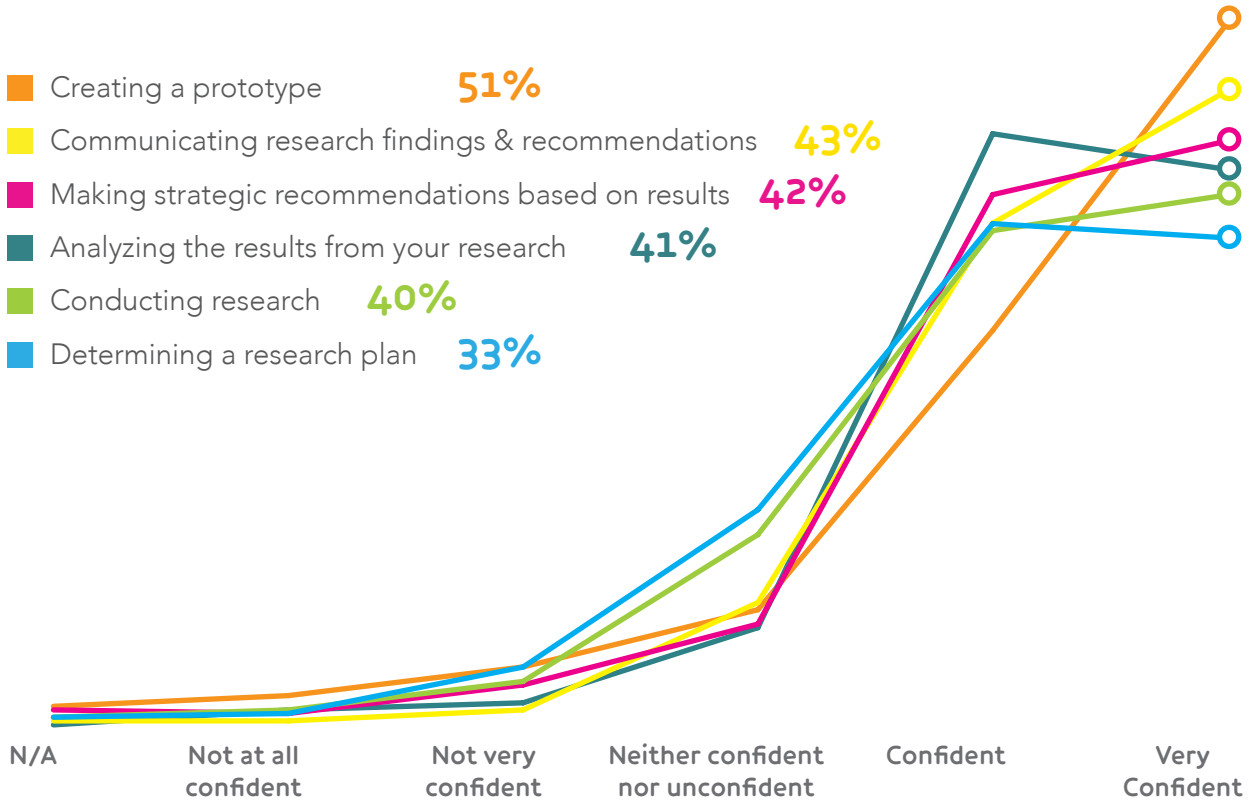
Managing UX Projects

As in 2017 six in ten (61%) respondents claim it is they who determine the approach and tools used in UX projects. Three in ten (31%) have some influence but the final decision is made by others. Only 3% of respondents profess to having no influence on the approach or tools used.

Responses to their level of confidence in handling UX projects were also similar to 2017, with a majority claiming to be "very confident" or "confident" for each component. However, it was again noteworthy that for only one component – "creating a prototype" - did at least half claim to be "very confident".

"Determining a research plan" was again the component where the fewest respondents expressed confidence, and there was an especially low number of "very confident" responses. So, the weakest areas, such as they exist, relate to the research role – planning and conducting.

How confident were participants at handling the following components of a UX project?



Managing UX Projects continued

Please rank the following attributes in order of influence when you or your team analyses an experience.

While opinions are diverse it would appear data, be it qualitative or quantitative, was most likely to influence the analysis of an experience.

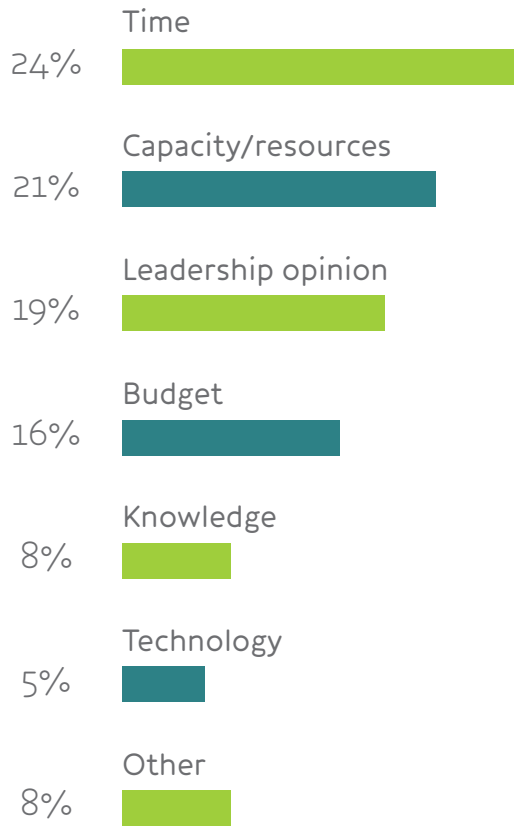
Clearly qualitative, where 40% stated it being the most influential and 23% second most influential, was the most common influence with six in ten rating it first or second.

Quantitative data (21% and 23%) was the next most widely nominated influence.

Suggesting "political" influences, 22% named internal leadership opinion as the strongest influence, with a further 12% rating it second. Less common influences were internal team opinion (11% and 20%) and competitive analysis / benchmarking (7% and 13%).

"Quantitative data" was less likely to be ranked highly by businesses in the size range 26-500 employees.

Which one of the following constraints has the biggest impact on your UX projects?



Project Constraints

Time constraints reign supreme for the second year running, though it has decreased by 4% from the 2017 mark. *Budget* constraints seem to not be as big as a concern as the year prior with a 7% drop when reporting elements which have the biggest constraints on a UX project at their company. This correlates with the increase in reported budgets from 2017 (page 19).

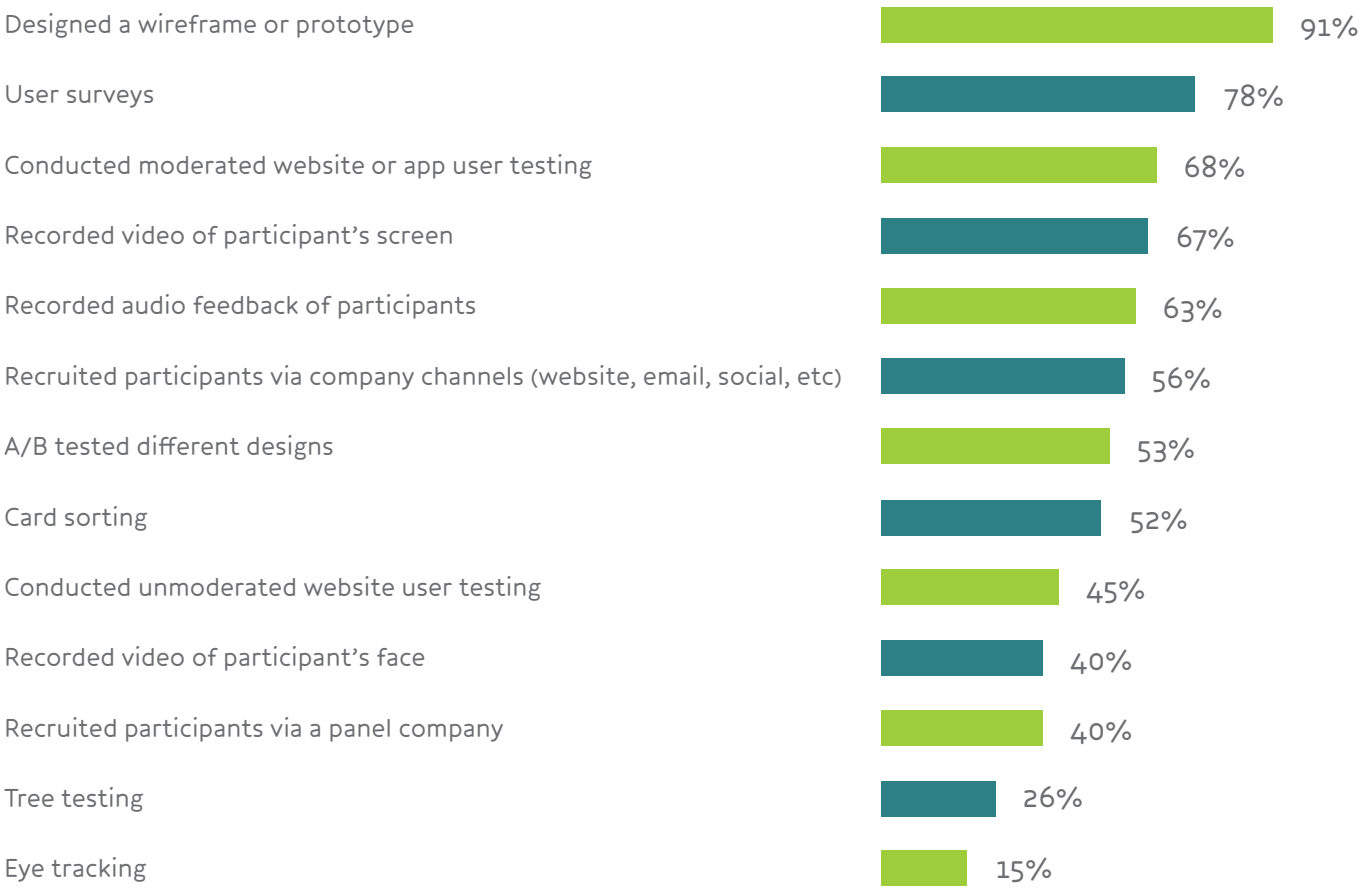
Conversely, *leadership opinion* leapt from 7% in 2017 to 19% to be a leading constraint. *Knowledge* and *Technology* dropped 3% and 4% respectively. 'Other' was listed by 8% of respondents, many of whom listed a version of company culture or structure being the blocker for their UX work. Others couldn't separate just one, however, budget and leadership opinion frequently surfaced as a pairing among these responses.

Research Actions

Respondents were asked to nominate which of 13 different elements of research they had used in the last twelve months. On average, respondents identified 7 elements, up from 6 in 2017.

Clearly the most commonly undertaken activity amongst these respondents was "designing a wireframe or prototype" followed by "user surveys". 2018 saw a notable increase in "moderated website or app user testing" (**+7%**), "record audio feedback of participants" (**+6%**), "card sorting" (**+6%**) and "unmoderated website or app user testing" (**+3%**).

Thinking specifically about the last 12 months, which of the following did you or your team execute?

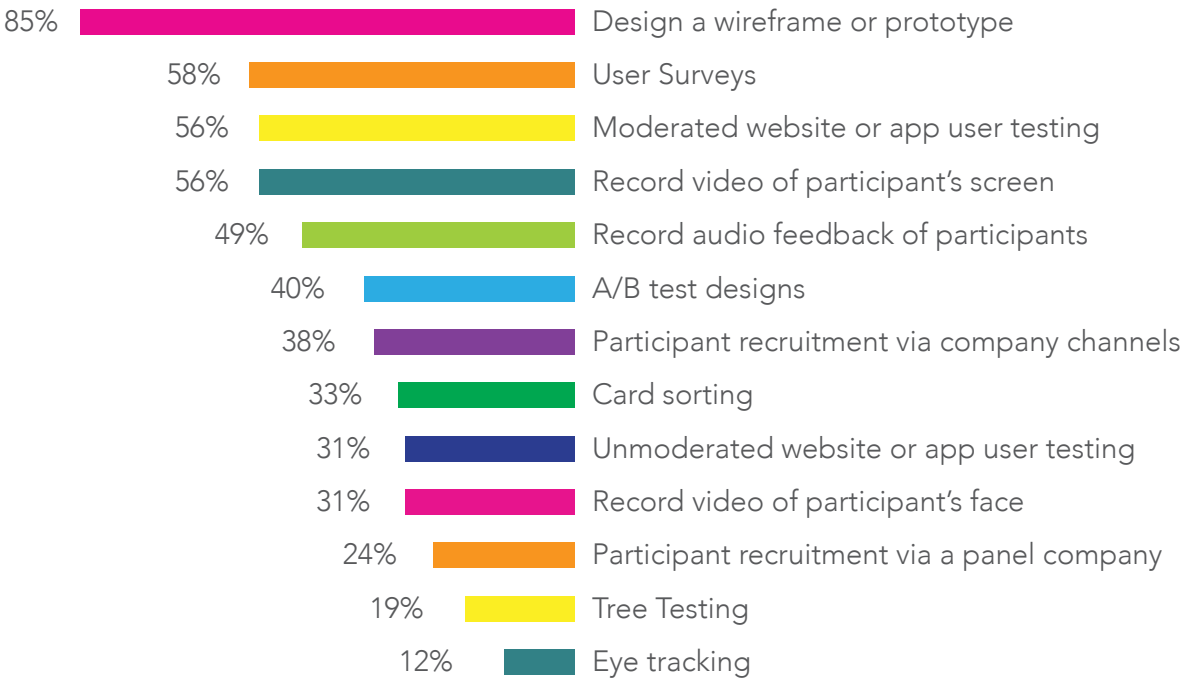


Research Actions continued

One action stood out as a clear intention amongst the majority of respondents when asked to rate the likelihood of performing certain research actions in their UX projects over the next twelve months. 85% said they would be "very likely" to "design a wireframe or prototype".

In general when looking retrospectively (2017 study) at the likelihood of performing tasks over the "next 12 months" respondents underestimated the likelihood by 15% - 30%. This is when compared to the 2018 (page 12) research actions they had reported performing in the prior 12 months. This behavior is somewhat mirrored when the participants were again asked to rate their likelihood of conducting the same list of research actions in the next 12 months their estimates were significantly lower than what they had just reported doing in the prior 12 month period.

Top research actions for the next 12 months, based on 'Very Likely'



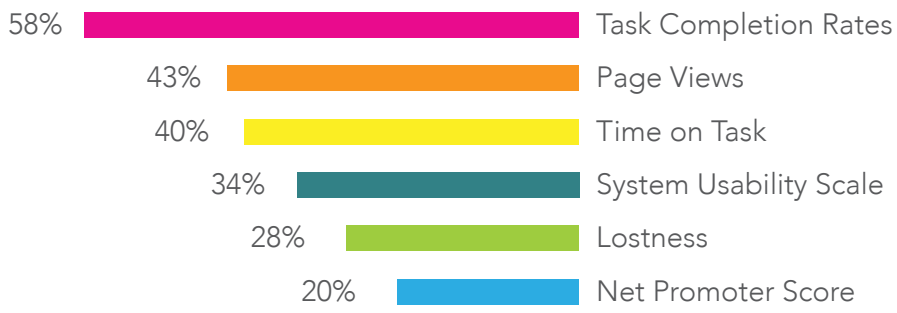
Research Actions continued

During research, how frequently do you utilize the following metrics?

For this question participants were asked to rate the frequency in which they use a series of quantitative metrics on a per project basis.

Using a weighted average 'Task Completion Rates' were the most widely used metric with over 58% of respondents reporting its use on "most" or "every" project. The least used metric 'NPS', narrowly edged out "Lostness". "NPS" has come under fire recently from a number of industry leaders which could help explain it low popularity. Conversely, the clear reason for the low rating of "Lostness" was due to 27% of respondents professing not to know what it was. To learn more about "Lostness" visit the article by Tomer Sharon.

Metric popularity based on use within 'most' or 'every' project



Please rank the following attributes in order of influence when you or your team analyses an experience.

When 1st and 2nd place were combined the gap between Quant and Qual closed with Quant clearly being the number two preference. Interestingly, when isolating respondents who noted Qual as being the most influential, the results changed, clearly elevating Competitor analysis / benchmarking into the third position.

1. Qualitative responses **(38%)**
2. Quantitative data **(21%)**
3. Internal leadership opinion **(21%)**
4. Internal team opinion **(12%)**
5. Competitor analysis / benchmarking **(8%)**

Percentages relate to instances of the attribute being ranked as the most influential.

Design Tools

Most Used Design Tools

1. Sketch (63%)
2. InVision (60%)
3. Axure (39%)
4. Adobe Photoshop (37%)
5. Adobe Illustrator (31%)

Most Common Pairings

1. InVision / Sketch (41%)
2. Axure / Sketch (19%)
3. Axure / InVision (19%)
4. Sketch / Photoshop (19%)
5. InVision / Photoshop (18%)
6. InVision / Illustrator (16%)

Top Prototyping Tools

1. InVision
2. Axure
3. Adobe XD
4. Marvel
5. Proto.io
6. Figma

Which of the following tools do you use for designing prototypes?

Respondents were presented with a list of 10 popular design tools, plus given the ability to enter 'other' for any tools they use which were not listed. The two main tools listed in 'other' were Balsamiq and Principle which equated to 4% and 3% respectively.

Some of the tools which rated highest when looking at pairings suggest that designers will use different tools for different use cases. For example, Axure/Sketch are not a pairing with an obvious integration that allow the two to work together seamlessly. Sketch/Photoshop would be viewed as competing alternatives and the fact they turn up as a pair could indicate that many designers are in the middle of a transition or are at least comparing the two.

In terms of company size the use of InVision and Sketch was quite even across all company sizes. However, in Axure's case it was significantly more likely to be used by companies with 500 employees or more. Figma and Marvel also saw a significantly increased likelihood of use but in their case it was in the 1 – 10 employee range.

India is the only country which uses Photoshop at a higher rate than Sketch, with the UK the most likely to spurn Photoshop in favor of Sketch. India was also the most likely to use JustInMind as their prototyping tool, though JustInMind was still significantly behind InVision, Adobe XD and Axure in overall use within India.

Information Sources

On average respondents utilize seven different channels of information among the 14 they were asked to consider. The most common channel was "industry news sites and blogs" (**79%**), followed by "email newsletters" (**72%**), "books" (**71%**), "attend conferences" (**71%**) and "articles in industry magazines" (**60%**) .

All channels appear to be well used with at least a third mentioning each source. The least popular were "online conferences" (**35%**), "membership to professional group" (**35%**), and "read articles in academic journals" (**35%**).

When comparing the 2017 report to this year "email newsletters" (**+9.5%**) saw the largest increase, followed by "listen to podcasts" (**+7.4%**), "books" (**+4.5%**) and "attend conferences" (**+4.5%**). "Membership to professional group" (**-8.5%**) and "read articles in academic journals" (**-6.5%**) saw the largest decreases.

Top 5 Podcasts

1. Design Matters
2. UX Podcast
3. DesignBetter.co **(NEW)**
4. UIE Brain Sparks **(2017 3rd)**
5. True North **(NEW)**

Top 5 Newsletters

1. InVision Weekly Digest
2. UX Design Weekly
3. UX Notebook **(2017 4th)**
4. UX Essentials **(2017 3rd)**
5. Designer Hangout **(NEW)**

Top 5 Communities/Groups

1. IXDA (**45%**)
2. UXPA (**38%**)
3. Ladies That UX (**26%**)
4. UX Designer Hangout (**21%**)
5. Designers + Geeks (**8%**)

'Other meetup.com groups' was selected by 42% of respondents.

Top 6 Books

1. Don't Make Me Think (Steve Krug)
2. Design of Everyday Things (Don Norman)
3. Lean UX (Jeff Gothelf)
4. About Face - V4 (Alan Cooper) **(NEW)**
5. The UX Team of One (Leah Buley)
6. UX Strategy (Jaime Levy) **(NEW)**

(NEW) - Denotes a first appearance on this list. Other green text denotates a ranking change from the prior year.

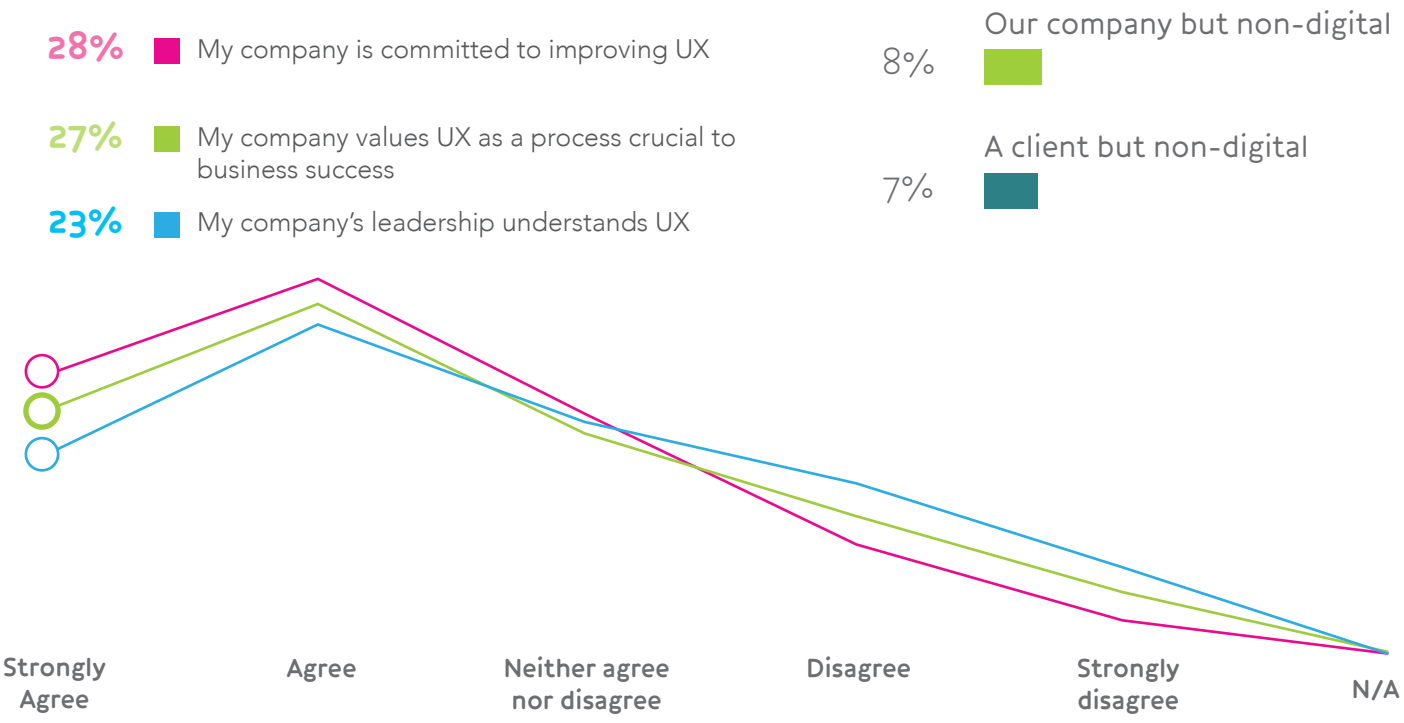
Internal UX Focus

It is clear that a majority of respondents work in companies and teams who create experiences for users of their own product. This is slightly different from 2017 where "client's product" and "client's website" were rated 2nd and 3rd respectively.

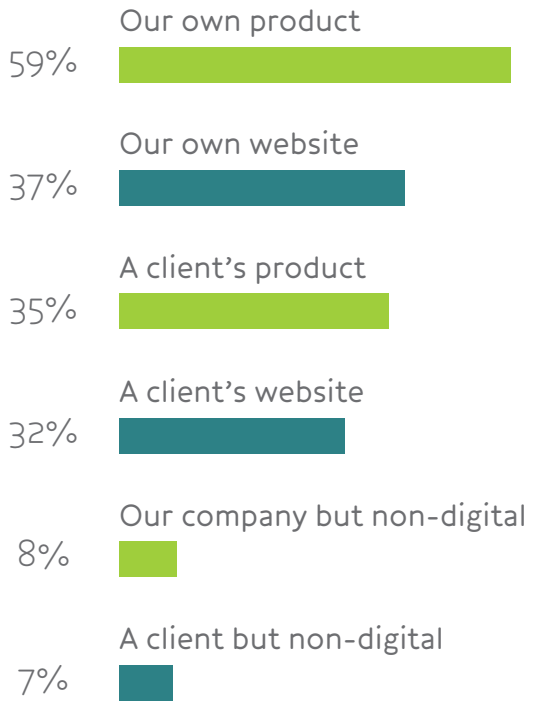
Outsourcing

In a near identical result to 2017, 42% of respondents claim their company outsources UX at times.

To what extent do you agree or disagree with the following statements:



Which of the following are the focus of your UX work?



This year respondents were less effusive with their agreement in the views of their company's support for UX. 'Strongly Agree' decreasing across all three statements. That said, 'Agree' picked up the slack so the combined agreement numbers were nearly identical to 2017.

Challenges Facing UX

For nearly a third (31%) of respondents **the single biggest frustration they experienced was related to leadership**, specifically the difficulties in gaining support conveying an understanding of UX. This frustration with 'leadership' also flowed in to other departments, such as, sales, marketing and engineering.

A further 8% of comments specifically criticized the lack of the leadership support for the UX role in their organization.

This absence of support or understanding is further reflected in the constraints of limited budgets/resources (14% of respondents) and time availability (15%) for effectively conducting projects.

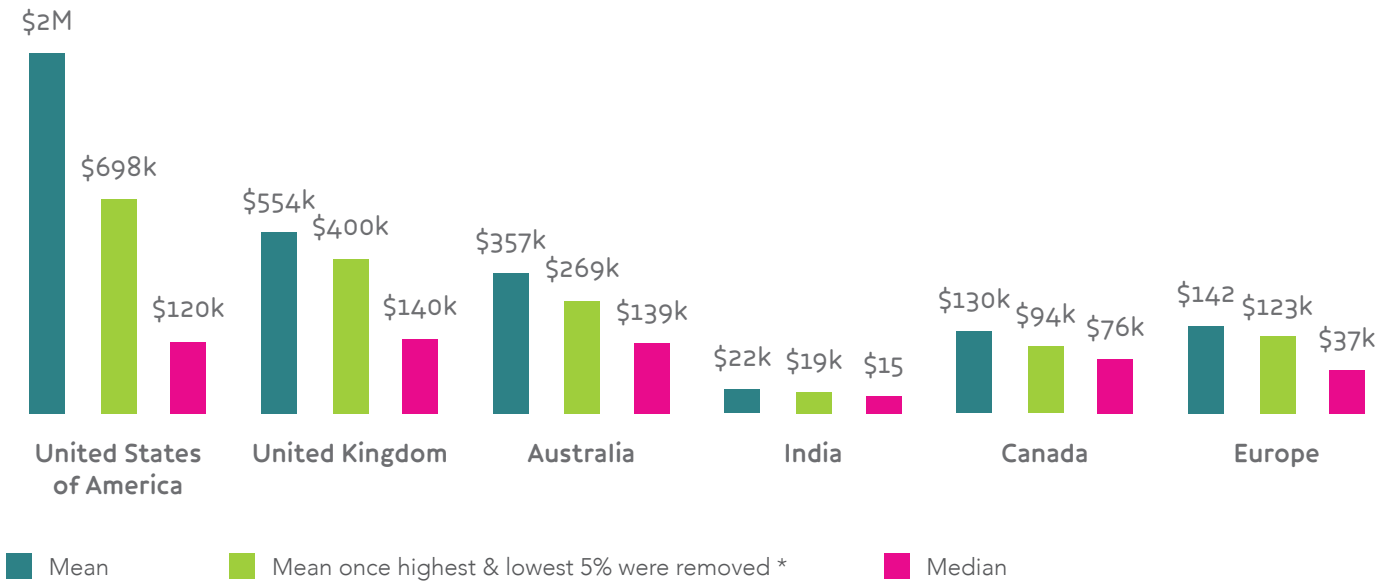
For a tenth (11%) of respondents **this absence of support was also manifested in the minimal or total lack of user research**, making their jobs infinitely more difficult. In this context 2% commented upon difficulties in recruiting users as participants in their research.

Ten percent commented on "business problems" within organizations including politics, interdepartmental conflicts and lack of strategic direction as frustrations in their role.

Looking at another dimension – **9% spoke of their isolation in the organization** – either as the single UX person or small teams – unable to share ideas, access a mentor or build knowledge. This was highlighted within the difficulties of team building (6%) due issues including a lack of training, struggles to find and recruit people with the relevant skills and experience. These issues also combined to increase the workload on the isolated UXers.

Budgeting For UX

What would you estimate your company's average annual budget for UX research or usability testing is?



Respondents were asked to report their estimation of budget using their local currency. This was then translated into USD to normalize the above chart for comparative purposes.

Over half (55%) the respondents expect their investment in UX to "increase" in 2018. Only 5% expect it to "decrease", while 27% believe their budget will "remain unchanged". A further 14% were "unsure" what will happen to their budget.

The main reason given for budgetary increase was "organizational attitude change towards UX" (43%) which was down 9% on the 2017 results. The big movers this year were "increase in projects" (28%) , up 16%, and "increase in UX services offered" (14%) down from 28% in 2017.

* While, strictly speaking, not a standard approach, we felt this metric provided some interesting insight, especially due to the presence of some extremely large budgets which dramatically elevated the standard mean when included.

UX Salaries

The rate of pay by position plays out much like you would expect. The positions with the greatest variance in reported pay were the UX/CX Researchers, followed by the UX/CX/ Product Designers and then the UI Designers.

CEO's and Founders would have sat just below UI Designer's, however, we decided not to include them in the listing as it was clear that half of the participants in this category were paying themselves only a token amount.

Other countries displayed a similar remuneration hierarchy to the USA. Interestingly the title of VP of UX/CX was only recorded once outside of the USA, in the UK. The more common senior title elsewhere in the world tended to be UX or CX Lead.

Top Paid Positions (USA)

1. **Head of UX/CX**
   $135,000 **(2017 = $134,000)**
2. **VP of UX/CX**
   $122,500 **(2017 = $130,000)**
3. **UX/CX Design Lead**
   $120,000 **(2017 = $125,500)**
4. **UX/CX Researcher**
   $106,600 **(2017 = $102,000)**
5. **Web Developer**
   $99,000 **(2017 = $80,000)**
6. **UI designer**
   $97,000 **(2017 = $81,000)**
7. **UX/CX/Product Designer**
   $95,800 **(2017 = $95,000)**
8. **Product Manager**
   $95,000 **(2017 = $124,000)**

The following page indicates the salary ranges for the main geographic groupings, irrespective of job title. The grouping of 'Europe' consists of Austria, France, Germany, Italy, Netherlands and Spain where the currency is the Euro. Comparing this year's results to 2017 we added an extra tier of salary, $150K+ and changed last year's top value from $120K+ to $120K - $150K. This contributed to the appearance of a leveling out of salaries, however the results were consistent when analyzing the participants who reported a salary above $120K/year. The notable exception was Canada where this grouping decreasing from 21% to 8% of respondents.

UX Salaries continued

Annual salary / compensation ranges from top responding countries.

Ranges relate to each country's specific currency. For example USD for the United States of America and the British Pound for the United Kingdom. The exception here is India, who's graph is in USD.

Attributes of UX Activity

Skills required of Graduates for UX Teams

There was a disparity of views upon what are the most important skills required for graduates entering a UX team. The three most common skills rated as most important were:

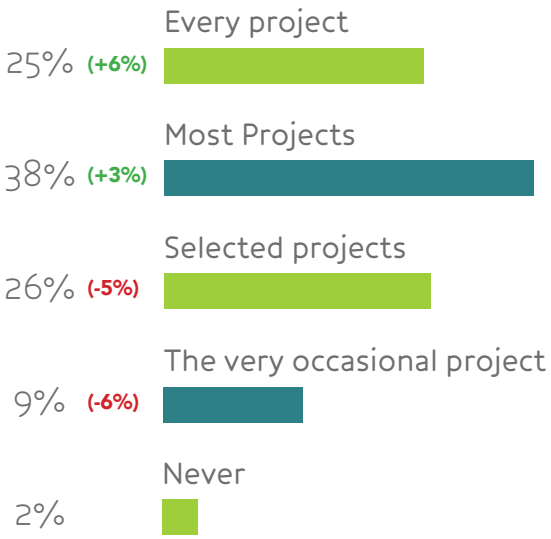
- Research and analysis experience (26%)
- Experience working within a team (21%)
- Prototyping and wireframing skills (19%)

When examining the overall importance ratings, other significant skills also valued highly were:

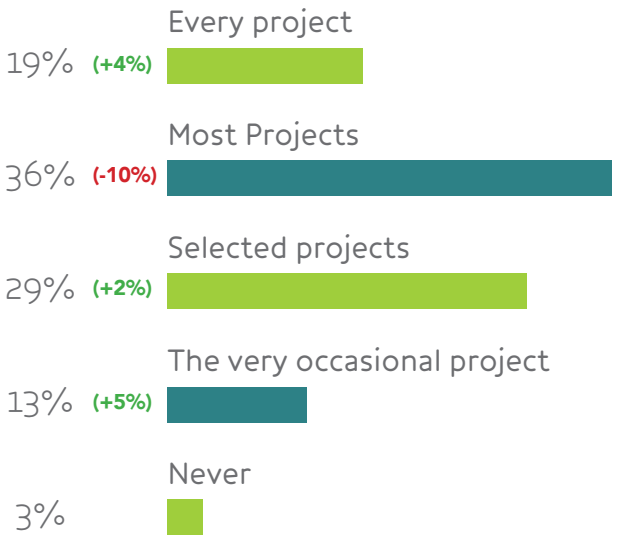
- Industry experience (via internships or placed project work)
- Information architecture
- Usability testing experience with common software/tools

There was little emphasis placed upon 'programming skills' (2%) and 'experience in leading a team' (3%). Females tended to place a greater emphasis on team experience where as males placed higher value on industry experience and programming skills.

How frequently do you or your team conduct UX research?



How frequently does your team conduct usability testing on your prototypes as part of your design process?



The Desire for UX Courses

A wide diversity of course themes were named as being sought after and useful for those in the UX arena.

The strongest demand was for courses on survey research, covering all aspects of research methodology, reporting and communicating results. A quarter (27%) of respondents sought training in this area.

Fifteen percent were seeking courses offering case studies and hands on training. The emphasis was upon practical lessons, possibly provided by industry leaders and mentors.

A tenth (11%) spoke specifically about training for both design and design thinking.

A further tenth (11%) spoke of training in the basics of UX and also new trends relating to the application of UX.

Eight percent indicated the need for training on how to collaborate, work as a team and demonstrate leadership. This was both within teams and across organizations. Inherent in this was a desire for courses that help to 'sell' UX and educate stakeholders on the importance of process.

There was a further demand for courses about data management and analysis amongst 8% of respondents. Some respondents (5%) spoke generally of the need for more courses be they online, at meet-ups, conferences or seminars.

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