



Actinic Web Design and Ecommerce Report 2004

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1. Introduction

This document comprises a summary and data from part II of the 2004 Annual Ecommerce Survey commissioned by Actinic. Part II monitors web site-building and ecommerce trends among web designers.

The research was based on interviews with 76 web design companies. The sample was selected at random from an independent database and not restricted to web design companies involved in ecommerce, so some general conclusions about the web design market can be drawn.

The research was conducted by pfa Research, www.pfa-research.com

2. Summary

2.1. Web designers and their clients

- Across the board, around 70% of web sites built are still new – unchanged from 2003.
- The proportion of web designers' clients having 50-99 employees fell by more than a half across the board. This may indicate a move towards in-house development on the part of larger companies, and suggests that SME clients are becoming increasingly important to web designers.
- 49% of web designers have never advised anyone other than their clients on their choice of ecommerce solutions.

2.2. Web site design and tools

- 70% of web designers use Macromedia Dreamweaver to build web pages.
- Most web designers run their web design software on a PC.
- Although still the preferred type of server for most web designers, the popularity of Microsoft.Net has declined since 2003.

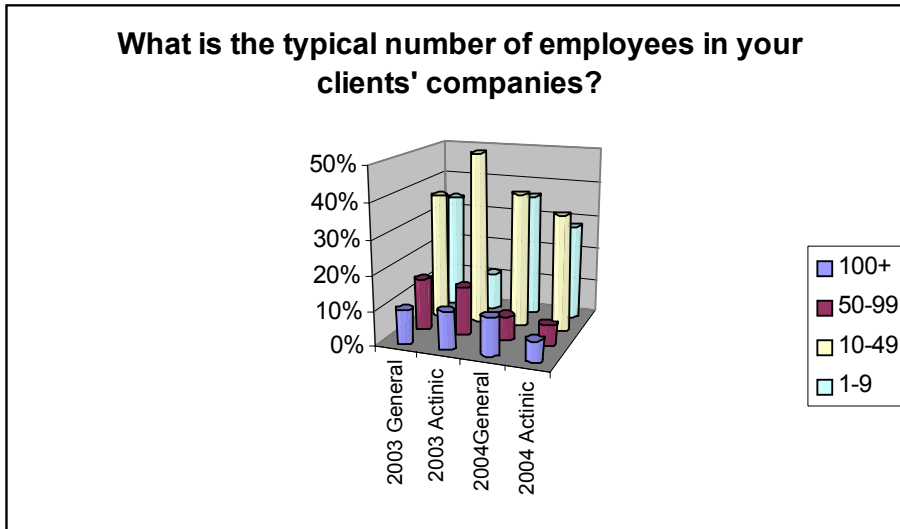
2.3. Ecommerce sites

- Ecommerce is becoming increasingly popular, with an increase in the number of websites enabled for selling online, from 17% last year, to 23% in 2004.
- The average price charged by a web designer to build an online store for a client decreased from £3,825 in 2003, to £2,293 in 2004. The decreasing average return from site building will favour continued growth in the use of packaged solutions, which enable developers to deploy sites more quickly and at lower cost.
- On average, only 8% of the web sites that designers built with online stores were deployed using a packaged solution.
- 33% of web designers perceived Actinic as a leading supplier of ecommerce solutions for the professional web design industry. Before they were interviewed, 76% had heard of Actinic already, up from 63% in 2003.

3. Web Designers and their clients

Web design companies build an average of 24.4 sites a year, 70% of which are new.

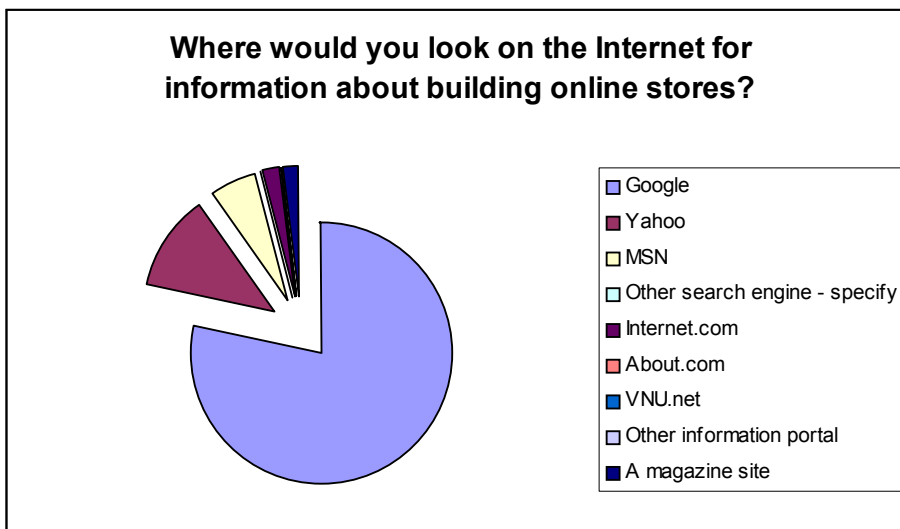
The proportion of web designers' clients having 50-99 employees fell by more than a half across the board, from 15% to 7% in general.



In general the average number of websites built by web designers in a year has slightly decreased (26.1 in 2003 to 24.4 in 2004).

3.1. Sources of information

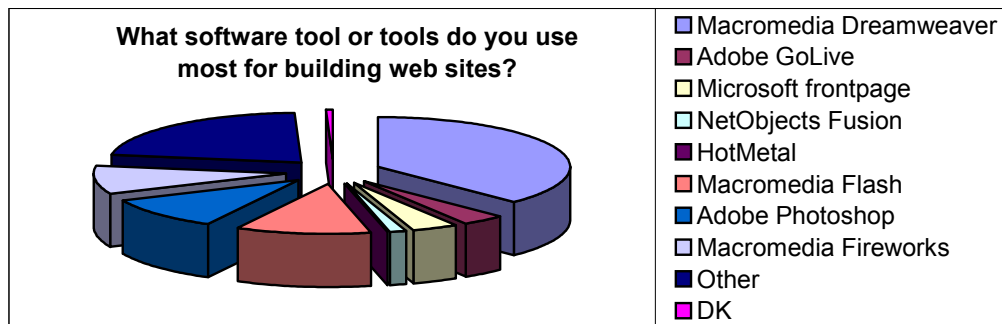
Google was by far the most popular starting point on the Internet (80%), with Yahoo and MSN proving the most popular alternatives (12% and 6% respectively).



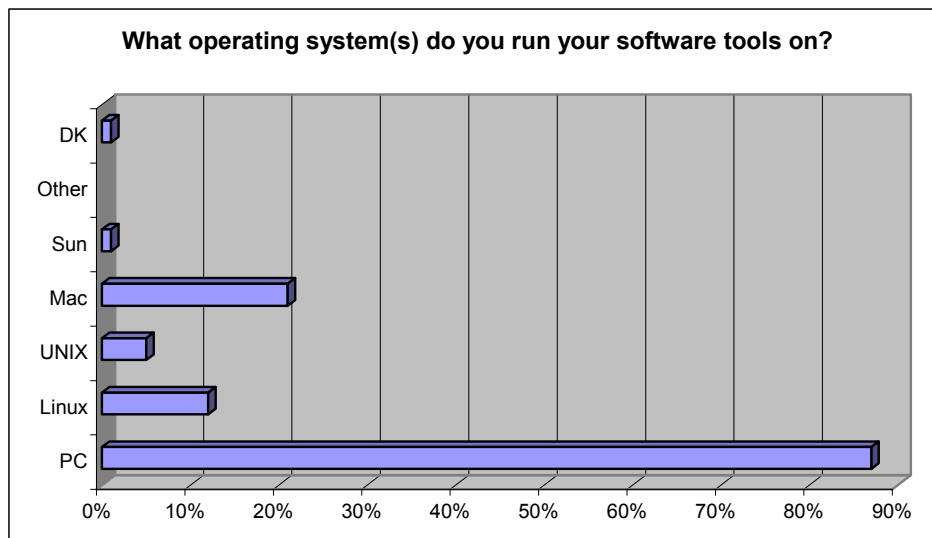
4. Website design and tools

4.1. Preferred Technology

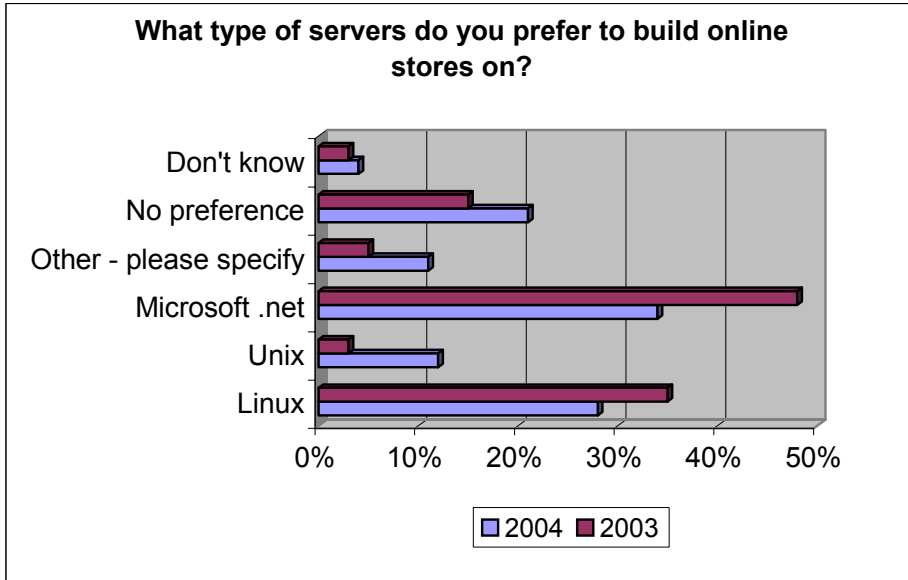
Software tools used by web designers include Macromedia Dreamweaver (70%), Macromedia Flash (21%), Adobe Photoshop (20%), and Macromedia Fireworks (17%). 41% of responders also chose 'other' as their answer or one of their answers. 'Others' included HTML, Macromedia Homeside and Eclipse.



There has been a slight decrease since 2003 in the number of web designers using their chosen software tools on a PC (91% 2003, 87% 2004). There has been a fairly significant increase in the number of web designers using Linux and Unix.



Although still the preferred type of server for most web designers, the popularity of Microsoft.Net has decreased from 48% in 2003, to 34% in 2004. The popularity of Linux has also declined, from 35% in 2003, to 28% in 2004. However, the popularity of Unix has increased from 3% in 2003, to 12% in 2004.

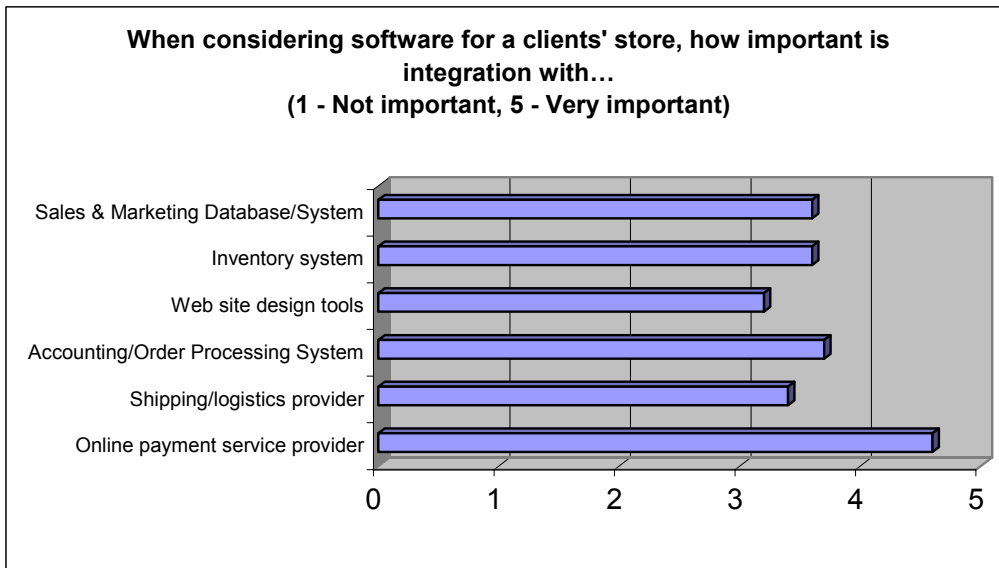


MySQL (59%) was by far the web designers' most popular choice for databases to drive online stores, with Microsoft SQL server (25%) and Access (20%) also proving popular.

4.2. Factors in Choosing

In choosing software to drive a client's store, the ease of being able to implement their own designs (4.7 out of 5), the product having industrial strength security (4.5), ease of use for the clients (4.4), and value for money (4.3) were the most important considerations for the designer. This has not changed from last year.

Designers considered integration with an online payment service provider (4.6) as the most important integration consideration.



5. Ecommerce sites

5.1. Ecommerce use and costs

The average number of websites developed by web designers which were enabled for selling online increased from 4.5 in 2003 to 5.6 in 2004, indicating that **the ability to sell online is becoming increasingly popular**.

In general, the amount charged by a designer to build an online store for a client has fallen from £3,825 in 2003, to £2,293 in 2004.

5.2. Use of packages

The majority of designers (53%) have used packaged solutions to deploy online stores. This percentage has declined very slightly from 2003, when 55% of designers had used a package solution. Only 8% of the web sites that designers built with online stores were deployed using a packaged solution.

Overall, the web designers seemed to agree that 'ecommerce packages let you develop online stores faster' (mean score 3.9 out of 5), 'it's good that a customer can go back to the supplier if you moved on and couldn't help them' (3.8), and 'it's easier to build an online store using an ecommerce package' (3.7). They most strongly disagreed with the statement that 'using an ecommerce package is a waste of money' (2.4).

33% of web designers perceived Actinic as a leading supplier of ecommerce solutions for the professional web design industry. Before they were interviewed, 76% had heard of Actinic already, up from 63% in 2003.