



# 2010

# OPEN SOURCE CMS MARKET SHARE REPORT



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# EXECUTIVE SUMMARY

## Overview

This report assesses 20 Open Source Content Management Systems on a variety of metrics related to Rate of Adoption and Brand Strength. The analysis looks at a broad range of indicators -- both direct and indirect -- with the goal of synthesizing trends and patterns that define the market leaders.

## Principal Conclusions

The final section of this paper discusses in detail the conclusions reached in this Report. The most significant conclusions being:

- The Big Three -- **WordPress**, **Joomla!** and **Drupal** -- remain firmly in command of the market.
- **WordPress** has taken the lead in brand strength after a strong growth year.
- The gap continues to narrow between .NET market leader **DotNetNuke** and contender **Umbraco**. This continues the trend observed in the 2009 Report.
- **Liferay** leads the Java WCM market, though **Alfresco** is not far behind and in fact leads in several metrics.
- Up and coming systems to watch include: **Concrete5** and **Umbraco**.
- Systems possibly at risk include: **Textpattern** and **Xoops**.

This paper is about the brand strength and market share of 20 open source web content management systems. As such, it contains important information relevant to selecting a CMS, but it should not be read as a final judgment on the feature quality, stability, or a particular system's suitability for any project.

With that said, our goal is to provide a body of useful data that can help you make informed decisions about the wide assortment of products in today's market.



# PRELIMINARY MATTERS

## What's Covered

### Top 20 Open Source CMS - 2010

(listed in alphabetical order)

- Alfresco WCM
- CMSMadeSimple
- Concrete5
- DotNetNuke
- Drupal
- e107
- eZ Publish
- Joomla!
- Liferay
- MODx
- Movable Type
- OpenCms
- Plone
- SilverStripe
- Textpattern
- Tiki
- Typo3
- Umbraco
- WordPress
- Xoops

This year's selection process began with 29 systems<sup>1</sup>. Based upon the research collected and the survey responses, the list was narrowed to a final set of 20 we believe accurately represents the Top 20 Open Source Content Management Systems<sup>2</sup>.

## What's Different This Year?

The following systems were present in last year's survey, but have been dropped this year:

- **Jahia** - In the 2009 Report, Jahia came in at the bottom of the list in a number of important metrics. We included the system in this year's preliminary research, and in the Survey, but upon compilation of the results we found the system had not managed to hold on to a Top 20 position in terms of brand strength.

- **phpWebSite** - phpWebSite was included in both the 2008 and the 2009 Open Source CMS Market Share Reports. In both Reports the system struggled and in both it was listed among the "Systems at Risk" section of those Reports. Again, for 2010, we included the system in our preliminary research and in the Survey, but in the end we felt that the phpWebSite project has not managed to match the vitality and market share of the other systems and it was dropped from this year's Report.

New to the Report this year:

- **Concrete5** - Concrete5 was on the shortlist for selection last year but did not make the final cut. This year, we felt the system had shown strong growth in several key metrics and deserved to be included in the Report.

- **Movable Type** - Though the system has always shown good market strength, we had excluded Movable Type in the past largely due to the system's emphasis on use as a blogging platform. In 2009 that began to shift and the trend has continued through the present. As a result, we looked again at the system this year and decided that it was an appropriate member of the survey.

---

<sup>1</sup> Among the systems that were considered (and participated in the survey), but ultimately eliminated: **Bricolage**, **dotCMS**, **Hippo CMS**, **Jahia**, **Magnolia**, **mojoPortal**, **nuxeo**, **phpWebSite** and **SPIP**. All excellent systems, but all unfortunately not reaching the level of adoption and brand strength that allowed them into the Top 20. It was, in several cases, very close and I expect we will see some of those same systems in next year's survey.

<sup>2</sup> A complete list of all the projects in the 2010 Report, with URLs to their primary project sites, can be found on the last page of this paper.

## Methodology

The survey data is grouped into two categories:

- **Rate of Adoption**
- **Brand Strength**

In each of the categories we use a multi-faceted approach. By assessing a wide variety of measures, we strive to identify broad trends and patterns from which we can draw conclusions with some degree of confidence.

At the end of each of the major sections of this paper, we summarize the findings and indicate which projects we deem to be "Leaders," "Movers," or "Laggards." This classification, though obviously subjective, indicates our interpretation of the data gathered in that particular area.

As a final note before we get started: Please keep in mind that several of the products in our sample group present unique challenges, from a research perspective. **WordPress**, **Alfresco**, **MODx** and **Movable Type** in particular are problematic. The problem lies in accurately identifying data points specific to the appropriate product.

- In the case of the CMS product known as **WordPress**, the difficulty occurs due to the existence of the hosted blogging service that is also branded **WordPress**. As the two products both lack naming distinction, the **WordPress** numbers are sometimes susceptible to distortions. In an attempt to filter out results of the term that are not related to **WordPress** (the open source content management system) we have sometimes used very specific searches, e.g., formulating queries that use the word "wordpress" together with the string "cms." While this approach tends to knock out references to **WordPress** the hosted blogging service, it also tends to kill off a certain number of relevant references, hence resulting in under-reporting. It's a balancing act and one that we footnote in the text when we feel it impacts the analysis.
- In the case of **Alfresco**, the issue is also related to the need to filter out irrelevant references. The problem here is that the company name is also a generic term that is in common usage. As with **WordPress**, above, this problem results in over-reporting. In an attempt to filter out results of the term that are not related to **Alfresco** the open source content management system, we have sometimes used very specific queries, e.g., searching for the word "alfresco" with the string "cms." Again, the approach can result in a degree of under-reporting. We footnote this issue when we feel it impacts the analysis.
- In the case of **MODx**, the possibility for confusion arises from the existence of another served-based software product: AMX Mod X. The similarly-named software product is aimed to the gaming sector (specifically to Half-Life) and we have tried to exclude these results by filtering **MODx** searches for "gaming." Given that the AMX Mod X target market is narrow, we do not believe this product has had significant impact on the validity of the results concerning **MODx**, the CMS.
- The situation with **Movable Type** is similar to that with **Alfresco**: we are dealing with a generic term in common usage. We dealt with it by combining searches for the term "movable type" with the string "cms."

Throughout, we footnote this issue when we feel it impacts the analysis.

## What's Different This Year?

This is the third year of this report and as a result, this year's report benefits from a richer data set and the existence of comparative metrics. We have also worked to refine our measurement techniques and where technology improvements exist, we tried to apply them.

Like last year, we sought direct evidence of market share and brand sentiment through the use of a targeted survey. We created an online questionnaire that would allow us to judge directly adoption patterns, brand recognition, and brand sentiment. More than 5,000 persons responded to the survey, of which more than 2,800 completed the entire question set<sup>3</sup>.

size of firm	% of respondents
1 only	21.1%
2 - 10	35.1%
11-20	8.0%
21-50	8.5%
51-100	7.0%
101-250	6.3%
251-500	3.2%
501-1,000	2.9%
more than 1,000	7.8%

Due to the large number of participants, this year's survey showed a remarkable diversity. It was truly global in nature, though the majority of the respondents came from North America and Europe, people from 98 countries participated. While most of the participants in this year's survey came from small firms, there was a significant variety in the firms involved, as the chart at left shows.

Aside from the improvements in the survey coverage, there are also changes to some of the measurements used in this Report. We felt last year's Report had grown to the point where it was ungainly and we desired to trim things down a bit. Accordingly, we consolidated some areas. Among the most noteworthy:

- We have dropped MySpace, due to diminishing relevance.
- We have also dropped Google Groups and Facebook Groups; Google Groups due to difficulties in counting and

Facebook Groups due to their decreasing vitality.

- We have re-focused our measurement of social media metrics to narrow our assessment to a set of share of voice measures for Blogs, Social Bookmarking, Twitter and Facebook posts.
- We have dropped the Awards section, as we questioned the usefulness of the metric and felt we had strongly indicators of reputation from other sources.

A final point needs to be noted concerning the comparative metrics in this report: As this year's survey set is different from last year's, comparative metrics are not available on the new set members. This is not fatal to the analysis as the survey is not dependent upon the comparative metrics. Where available, the comparative data is displayed in tabular format, making it clear when one of the new systems lacks historical figures.

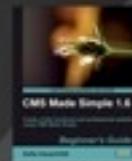
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<sup>3</sup> The survey was promoted by (1) press release; (2) announcement to the various projects involved in the survey; (3) email to last year's participants; (4) announcements on [PacktPub.com](http://PacktPub.com); (5) announcements on [CMSWire.com](http://CMSWire.com). We would like thank Packt Publications and CMSWire for their continued support of this project.

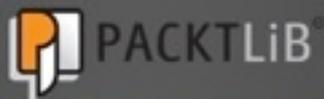
# Measuring Rate of Adoption

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# Measuring Rate of Adoption

We began our examination of the open source CMS market by attempting to measure the rate of adoption for each of the systems in our sample set. To gain insights into actual adoption rates, we looked at a variety of metrics. Data was gathered on each of the following topics:

- **Downloads**
- **Installations**
- **Third Party Support**

## Downloads

### Which system sees the most downloads?

Insight into download rates should be one of the most compelling facts in assessing the popularity of a software product. Unfortunately, the download data for open source CMS products reveals much less than one would hope.

Comparing the download figures is problematic, for the following reasons:

- data is not available on all of the systems<sup>4</sup>
- some download sites are mirrored and the statistics are not automatically aggregated
- download rates are not constant over time, a new release will generate a large amount of excitement and an accelerated download rate for the period immediately following the release, hence skewing the weekly averages (which we tend to rely upon).
- web host automated installation packages (e.g., cPanel, Plesk, Fantastico), are not considered in the counts
- installation packages included in Linux distros (e.g., Debian or Gentoo) are also excluded from this analysis

Exhibit 1, on the next page, provides a comparison of the download numbers for the most recent major releases from each of the systems.

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<sup>4</sup> This is, however, our best year yet in terms of download data; we have data we feel is reliable for 15 of the 20 projects in this year's Report. [See](#), Exhibit 1.

	Average Weekly Downloads '10	Source	Trend
<b>WordPress</b>	983,625	<a href="http://wordpress.org/download/counter/">http://wordpress.org/download/counter/</a>	<b>126.8%</b>
<b>Joomla!</b>	113,836	spokesperson	<b>-39.9%</b>
<b>Drupal</b>	33,671	spokesperson	<b>-46.1</b>
<b>DotNetNuke</b>	13,000	spokesperson	unknown
<b>CMSMadeSimple</b>	9,948	spokesperson	<b>102.9%</b>
<b>Liferay</b>	9,435	spokesperson	unknown
<b>TYPO3</b>	7,461	Sourceforge	unknown
<b>eZ Publish</b>	7,031	spokesperson	<b>25.3%</b>
<b>Alfresco</b>	7,000	spokesperson	unknown
<b>Umbraco</b>	5,420	<a href="http://umbraco.codeplex.com/stats">http://umbraco.codeplex.com/stats</a>	<b>-4.4%</b>
<b>MODx</b>	4,500	spokesperson	<b>-18.2%</b>
<b>Tiki</b>	2,500	spokesperson	<b>570.2%</b>
<b>SilverStripe</b>	2,414	spokesperson	unknown
<b>e107</b>	1,617	Sourceforge	<b>-27.9%</b>
<b>Xoops</b>	1,388	Sourceforge	<b>14.8%</b>

## Exhibit 1: Notes on Interpretation

- Information was unavailable on the following systems: **Concrete5, Movable Type, OpenCms, Plone, Textpattern**
- All projects were contacted with requests for this data; those projects that responded are noted above with *Source: spokesperson*.
- The **Alfresco** numbers represent the Community Edition (the open source product).
- Trend: Strong growth numbers from **WordPress** and **Tiki**. It should, however, be noted that the source of our data for **Tiki** changed from 2009 to 2010, which may account for some of the difference.
- Trend: Decreasing average download rates are seen for **Joomla!, Umbraco** and **MODx**. It should, however, be noted that the source of the data for **Joomla!** and **MODx** was different this year (this year's data came from the Projects themselves, whereas last year was calculated from publicly available data). It is possible that the change in the calculation method accounts for at least some of the differences noted.

## Installations

While information regarding the number of downloads for each system is useful, the simple fact is that downloads do not equate with installations. People may download for trial purposes and never adopt, and, as noted above, the download numbers fail to account for third party installers. Shared web hosts offering their clients use of installation systems like Plesk and Fantastico account for a meaningful number of installations that are not included in the download numbers we saw above.

In an attempt to gain evidence of the number of actual installations in the market, we turned to multiple sources:

- **Survey Data**
- **Third Party Analysis**

While the information gathered from the survey is our most direct indicator of market share, the survey data may not be the most representative. Accordingly, we have also included data from third parties in an attempt to provide a balanced perspective.

## Survey Data

### **What system are you using now?**

As part of this year's survey we asked the participants what CMS they are using now. More than 4,000 people responded. Their responses are shown in Exhibit 1, on the next page.

Exhibit 2 - Installations as per Survey

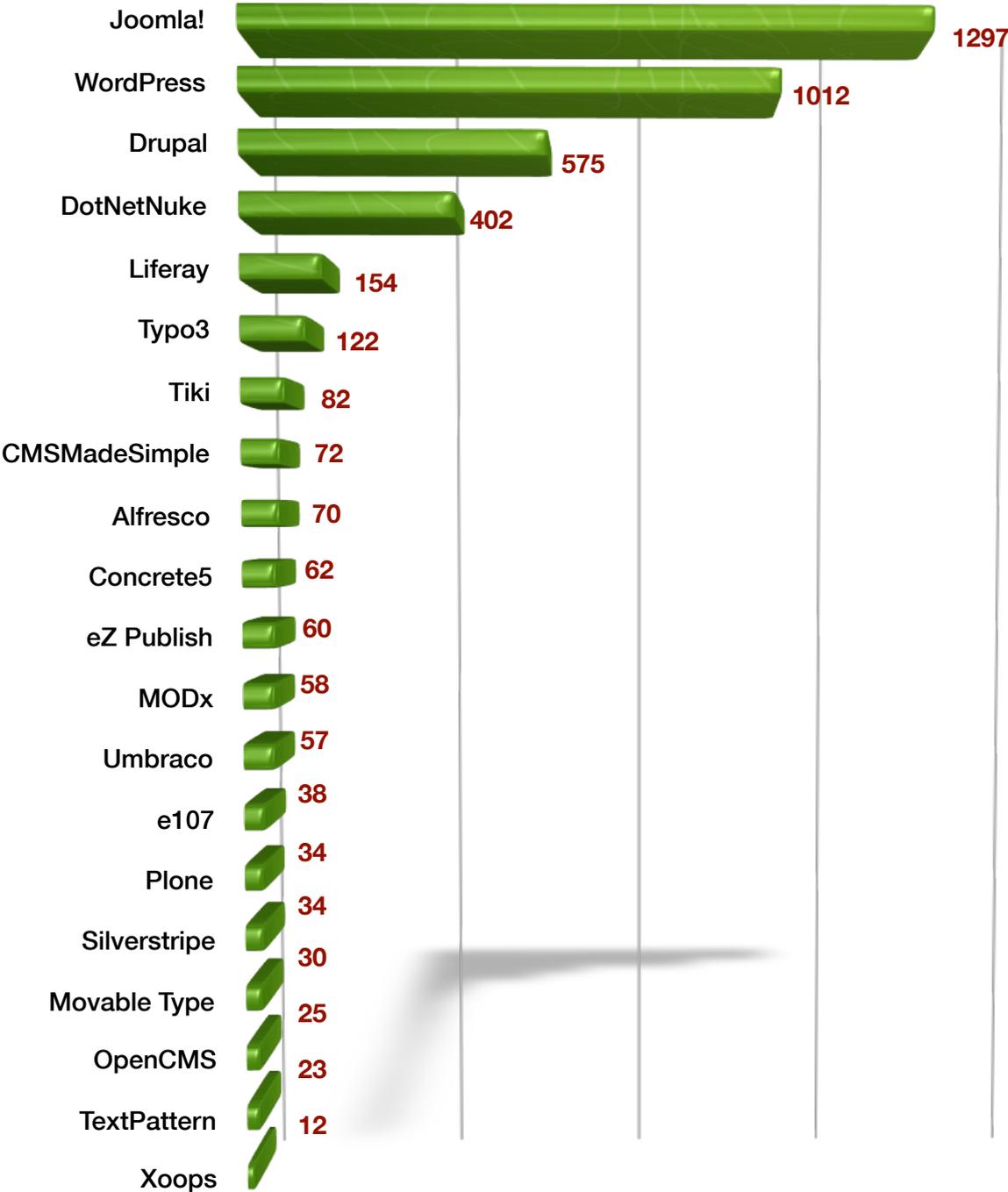


Exhibit 2: Notes on Interpretation

- Survey respondents were instructed to skip this question if they were using none of the systems in the survey set.
- We have concerns about the representativeness of this data set. We feel the survey data is likely slanted towards the projects with more active communities, as those communities made an effort to publicize the existence of the survey to their members. **Joomla!**, **Tiki** and **DotNetNuke** all engaged in promotion of the survey, to one extent or another. Compare e.g., the data in the next two charts.

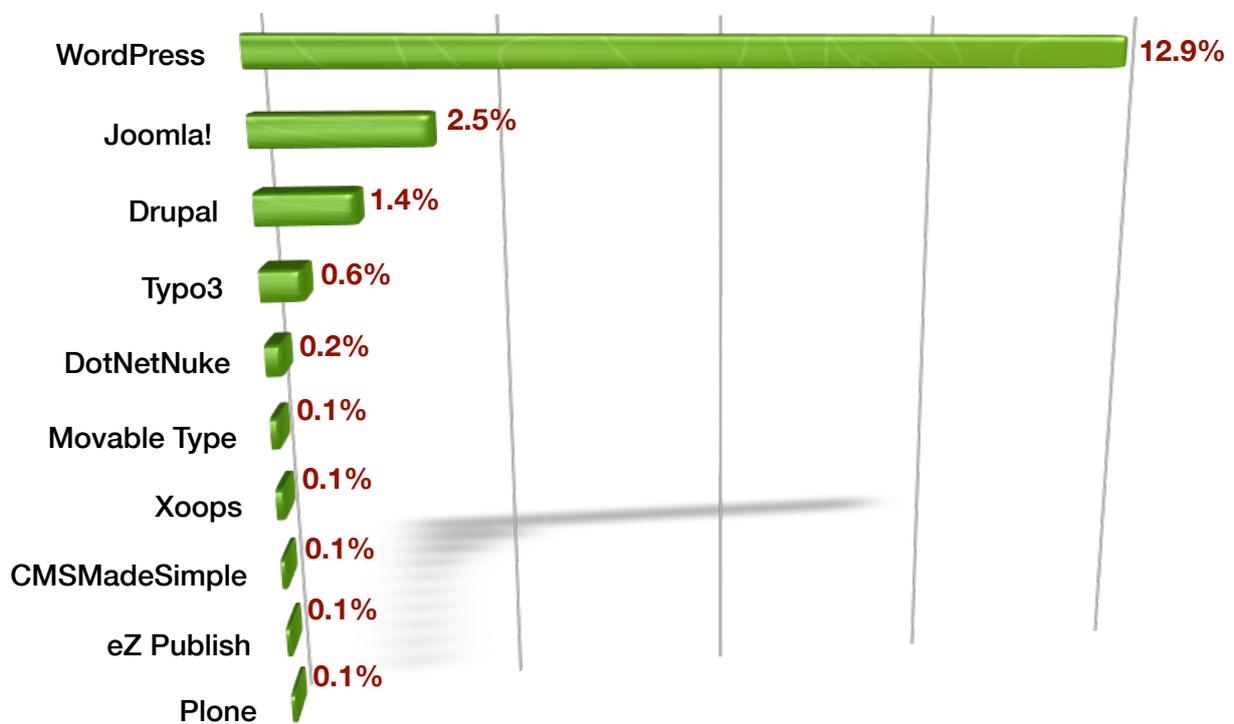
## Third Party Analysis

### What do the most popular sites run?

As a means of gaining further insights into the representativeness of our survey results, we turned to a group of third party sites who address similar issues.

**W3Techs** analyzes the top one million websites in Alexa's rankings in terms of the technologies used on those sites. Including in their analysis is a look at content management systems. Their analysis covers a number of the systems in our survey and has the added advantage of objectivity and a large sample set. Exhibit 2 shows their assessment of market share.

Exhibit 3 - The Alexa One Million



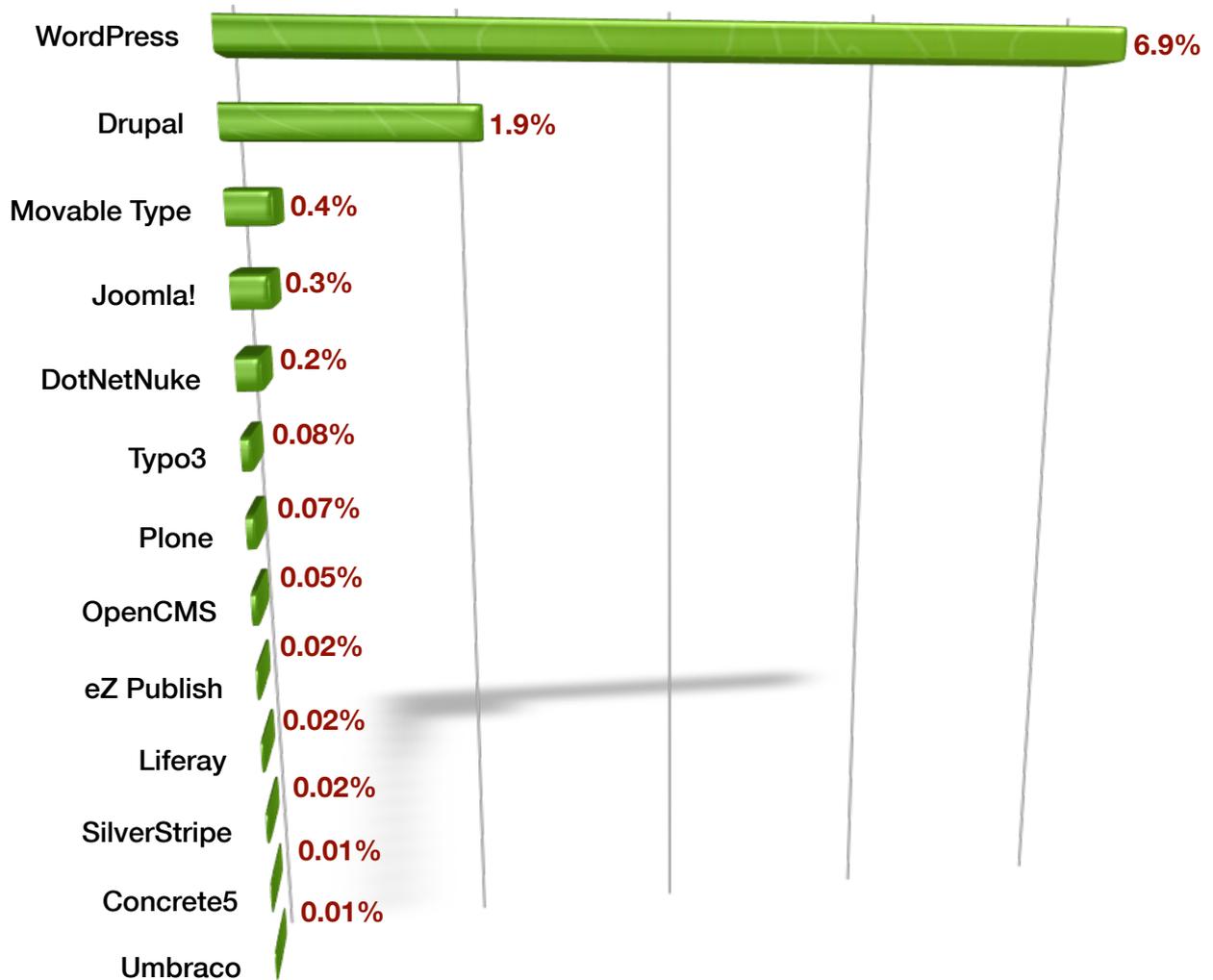
Source: **W3 Techs**, [http://w3techs.com/technologies/overview/content\\_management/all](http://w3techs.com/technologies/overview/content_management/all) (8 Dec 10).

### Exhibit 3: Notes on Interpretation

- The **W3Techs** system does not assess **Alfresco** and **Textpattern**.
- **e107**, **Liferay**, **Concrete5**, **MODx**, **SilverStripe**, **OpenCms**, **Tiki** and **Umbraco** were listed as having “less than 0.1% market share.”

**BuiltWith** is another group that analyzes the technology behind today's websites. **BuiltWith** looks at a different group of sites than **W3Techs**: where **W3Techs** assesses the top one million sites according to Alexa, **BuiltWith** looks to the top one million websites in Quantcast's rankings, along with other websites that have been registered at the **BuiltWith** website. Exhibit 4 shows their assessment of market share.

Exhibit 4 - Quantcast One Million



Source: **BuiltWith**, <http://trends.builtwith.com/cms> (30 Nov 10).

#### Exhibit 4: Notes on Interpretation

- The numbers represent a % of sites in the **BuiltWith** selection set that use each system.
- The chart represents a combination of two separate sets of data at **BuiltWith**.
- The results did not show occurrences of **Alfresco**, **CMSMadeSimple**, **e107**, **MODx**, **Textpattern**, **Tiki** or **Xoops**.

## Third Party Support

Next we look at third party support as an indicator of adoption. By looking at the number of third parties who offer services targeting the users of a specific system, we can make inferences about the system's popularity.

For this metric we will look at two groups of service providers:

- **Developers**
- **Publishers**

Commercial developers and publishers are two of the easiest and most meaningful groups to assess.

- In the case of developers, the question is: How many developers are offering services for each system?
- In the case of publishers, the question is: How many books are in print, or scheduled for publication, for each of the systems?

In both situations, as the parties have commercial interests, the results should give us some idea where third parties are putting their money and effort and where they think there is market share worth capturing.

## Developer Support

### **How many developers are offering services for each system?**

Eance<sup>5</sup> and Guru<sup>6</sup> provide similar online services designed to help buyers locate freelance professionals.

Eance is focused on web, programming, writing and related professions. More than 306,000 providers are registered on the site, of which more than 81,000 claim to offer web and programming services. We visited Eance for a quick look at how many providers were offering services for each of the systems in our survey.

Guru provides a service similar to Eance, though their focus is less on technology professionals. Guru does however claim to be "the world's largest online service marketplace" with more than 250,000 active freelance profiles (more than 42,000 freelancers are listed in the "Websites and Ecommerce" category).

We searched each for developers offering services for each of the systems in our survey set. The results are shown in Exhibit 5, on the next page.

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<sup>5</sup> See, <http://www.elance.com>

<sup>6</sup> See, <http://www.guru.com>

	Elance	Trend	Guru	Trend
WordPress	16,321	576%	3,758	202%
Joomla!	12,857	319%	3,745	142%
Drupal	6,500	300%	2,043	162%
DotNetNuke	794	227%	342	95%
TYPO3	238	205%	84	47%
MODx	198	296%	69	97%
Liferay	139	248%	59	79%
Plone	110	197%	84	265%
Alfresco	98	238%	41	116%
Xoops	87	123%	62	63%
SilverStripe	87	444%	21	91%
Umbraco	81	479%	16	167%
Movable Type	69	unknown	44	unknown
Concrete5	42	740%	12	500%
OpenCms	37	363%	10	25%
e107	35	192%	19	73%
Textpattern	32	129%	24	26%
eZ Publish	25	56%	9	13%
CMSMadeSimple	11	120%	7	250%
Tiki	7	75%	13	63%

### Exhibit 5: Notes on Interpretation

- Trend column shows % increase over figures shown in the 2009 Report. As **Movable Type** was not included in the 2009 Report, there is no trend data for that system. Note that although **Concrete5** was not included in last year's Report, we did gather data on the system last year, hence a trend number is included for this system.
- Trend: Note significant percentage increases by **WordPress**, **SilverStripe**, **Concrete5** and **Umbraco**.
- Laggards: **Tiki** and **CMSMadeSimple**, both in terms of actual numbers of providers and in growth trend.

## Books in Print

### **How many books are in print, or scheduled for publication, for each of the systems?**

To gain further insights into the extent that each system enjoys support from fans and third parties, we looked at books in print.

For this metric we sought to learn three things: First, who has the largest number of books in print, second, which systems have been the subject of publishing activity in the last 12 months and finally, which systems are currently the subject of books yet to be printed. The search was restricted to English language books only.

A visit to Amazon<sup>7</sup> produced the information contained in Exhibit 6 on the next page.

Note that the data in Exhibit 6 is sorted according to publishing activity in the last year.

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<sup>7</sup> See, <http://www.amazon.com>

	Total in Print	Released in 2010	Announced
WordPress	161	72	8
Joomla!	88	19	11
Drupal	71	17	14
Plone	19	8	0
DotNetNuke	23	3	0
TYPO3	10	3	0
Alfresco	6	3	0
Liferay	10	1	2
OpenCms	4	1	0
Xoops	4	1	0
CMSMade Simple	1	1	0
eZ Publish	5	0	0
Movable Type	2	0	0
MODx	1	0	0
SilverStripe	1	0	0
e107	1	0	0
Textpattern	1	0	0
Umbraco	0	0	1
Concrete5	0	0	0
Tiki	0	0	0

### Exhibit 6: Notes on Interpretation

- A comparison with the figures released in 2009 shows an explosion of new titles for the Big Three. We attribute this to the rise of ebooks, which have brought to market a large number of speciality titles and small press titles. Still, that said, the number of **WordPress** titles released in the last twelve months is very impressive -- averaging 6 new titles a month!
- 9 of our systems showed no publishing activity in the last 12 months.
- **Umbraco** is a relatively young system. We find it encouraging that there is one title in the works for the system and expect that next year may see more.
- Laggards: **Tiki** and **Concrete5**. This is more troubling for **Tiki**, given the age of the system. **Concrete5**, in contrast, is a new comer and it may be too early to expect attention from publishers.

# Measuring Brand Strength



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# Measuring Brand Strength

In this section we turn to assessing the intangible -- brand strength. In response to this challenge, we cast our net wide and captured a broad sampling of data. We grouped the results into the following categories:

- **Search Engine Visibility**
- **Project Site Popularity**
- **Mindshare**
- **Reputation**

## Search Engine Visibility

How easy is it to find each system on the search engines? How competitive is each project in terms of search marketing? Insight into these issues gives us information on the visibility and the prominence of each of the projects in our survey. We assess search engine visibility by examining the following statistics:

- **Search Engine Ranking**
- **Google Page Rank**

## Search Engine Ranking

### How do the project sites rank?

Search engine rankings are a competitive business as good performance on the search engines is often a key to driving traffic to a site. In an effort to discern the visibility of each of the systems in the sample group, we queried Google, Yahoo! and Bing with a set of likely keyword combination then checked to see which of our project systems made it into the first three pages of results (top 30 results). The results are summarized in Exhibit 7, below.

The keywords chosen were:

- **content management system**
- **open source content management system**
- **open source cms**
- **cms**
- **web cms**
- **web content management system**

	Top 5	Top 10	Top 20	Trend
Alfresco	6	12	14	+19
Drupal	5	9	13	-2
Joomla!	4	6	12	-11
CMSMadeSimple	1	5	8	-2
OpenCms	2	3	7	+6
Concrete5	1	2	7	+35
eZ Publish	1	1	3	+21
Plone	0	3	4	-4
MODx	0	2	4	+6
DotNetNuke	0	0	3	+13
TYPO3	0	0	1	0
Umbraco	0	0	0	-1
WordPress	0	0	0	-2
Textpattern	0	0	0	-6

### Exhibit 7: Notes on Interpretation

- We are looking here at the change in ranking for each of the primary project sites between 1 December 2009 and 30 November 2010.
- The numbers in the first three columns of numerical data indicate the number of pages in each grouping.
- The Trend data is the net gain or loss in position within the Top 30 results, *i.e.*, the trend score of **+19** for **Alfresco** indicates that over the last year the **Alfresco** site has enjoyed a net gain in position of 19 places.
- Trend: The big winner here is **Alfresco**, which last year showed the greatest deterioration in rank over 2008. The trend has been completely reversed, with **Alfresco** showing not only the most pages in the Top 20, but also the most improvement.
- **Umbraco**, **WordPress** and **Textpattern** both appeared briefly in the Top 30, but have dropped out again by the time the data was finalized.
- **e107**, **Liferay**, **Movable Type**, **SilverStripe**, **Tiki** and **Xoops** showed no ranking in the Top 30 for any of the terms in during the 12 month period.
- The lack of visibility of the **WordPress** project site comes as a surprise, but the result was the same in 2009. A quick look at the code for the wordpress.org site shows little effort has been made to optimize the site for search engines.

PageRank	
9	<p>Drupal</p> <p>Joomla!</p> <p>Plone</p> <p>WordPress</p>
8	<p>DotNetNuke</p> <p>eZ Publish</p> <p>Movable Type</p> <p>TYPO3</p> <p>Xoops</p>
7	<p>Alfresco</p> <p>CMSMadeSimple</p> <p>Concrete5</p> <p>e107</p> <p>Liferay</p> <p>MODx</p> <p>OpenCms</p> <p>Textpattern</p> <p>Tiki</p>
6	<p>SilverStripe</p> <p>Umbraco</p>

## Google PageRank

### How does Google rate the project sites?

PageRank is an analysis and ranking algorithm created by Larry Page and used as part of the way Google assesses the relative importance of websites. The algorithm assigns a numeric weighting from 0-10 (where 10 is the highest ranking) for each webpage on the Internet; thus PageRank denotes a site's importance in the eyes of Google<sup>8</sup>.

We look to the PageRank of the primary project sites for each of the systems in the survey, in an attempt to gain some insight into Google's perception of the relative importance<sup>9</sup> of each of those sites.

### Exhibit 8: Notes on Interpretation

- Trend: **CMSMadeSimple** improved from 5 to 7.
- Trend: **Drupal** improved from 8 to 9,

<sup>8</sup> The PageRank is derived from a theoretical probability value on a logarithmic scale like the Richter Scale. The PageRank of a particular page is roughly based upon the quantity of inbound links as well as the PageRank of the pages providing the links. It is known that other factors, e.g. relevance of search words on the page and actual visits to the page reported by the Google toolbar also influence the PageRank. See, <http://en.wikipedia.org/wiki/PageRank>

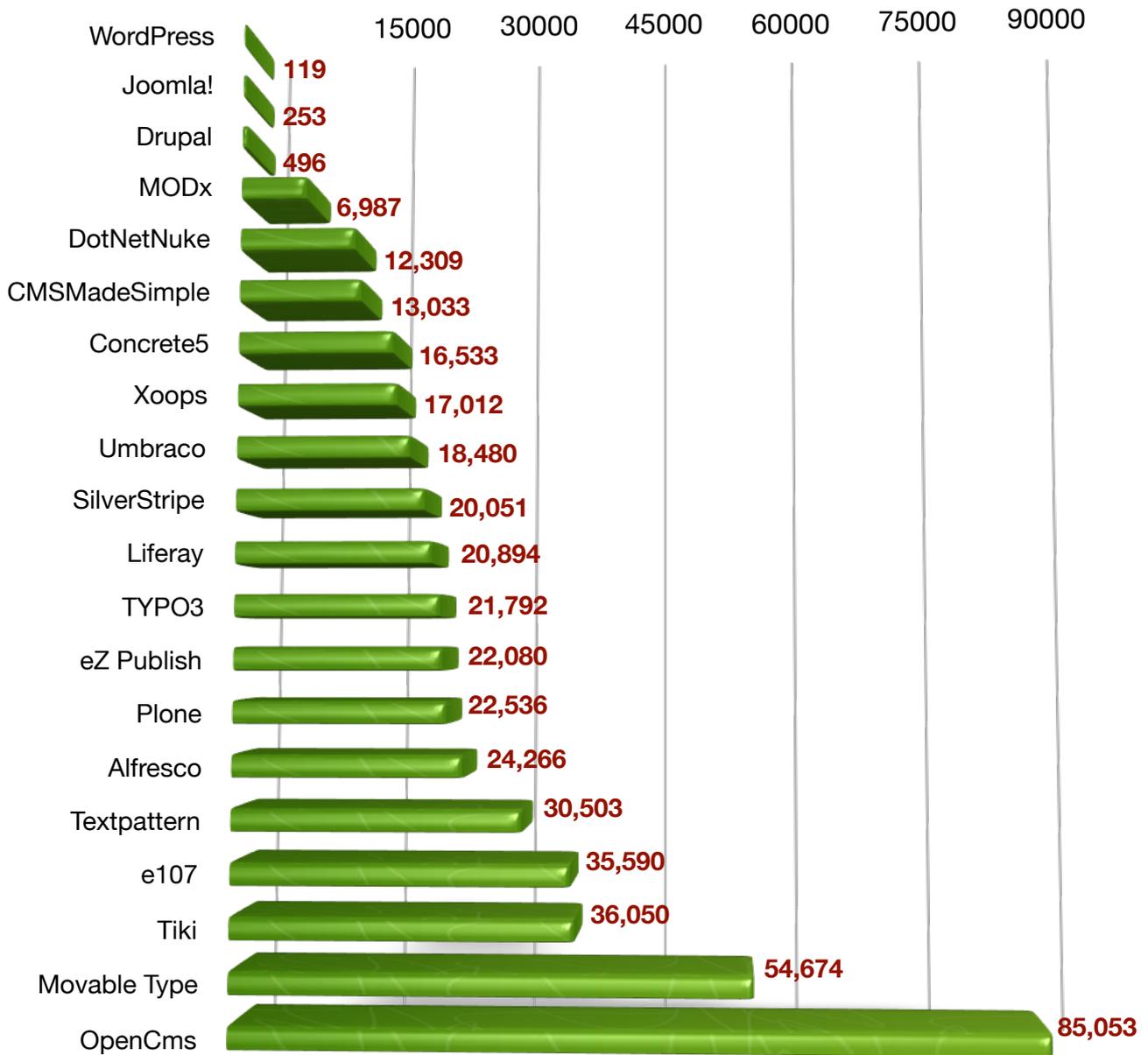
<sup>9</sup> We would hasten to add that the value of PageRank as a meaningful measure of relevance is doubtful. There are well-documented cases where PageRank and search ranking do not correlate well.

# Project Site Popularity

## How popular are the project sites?

To gain insight into the relative popularity of each of the projects, we took a look at each of the system's primary project website, with the goal of determining which project site has the most traffic. To reach this determination we turned to the ranking services provided by Alexa<sup>10</sup>. The Alexa ranking of a site provides a measurement of a site's popularity relative to other sites. While the Alexa metric is not 100% accurate, it does provide a convenient tool with a standardized approach to comparing site popularity.

Exhibit 9 - Alexa Rank



### Exhibit 9: Notes on Interpretation

- The lower the value, the higher the ranking.
- Trend: Since 2009, there is no change in ordering for top five systems.
- Trend: Significant improvement in position by **CMSMadeSimple**, **Umbraco**.

<sup>10</sup> See, <http://www.alexa.com>

## Mindshare

Which systems are in the forefront of the public's mind? How well known are the brands in this year's survey? To gain insights into this issue we looked at a mix of metrics:

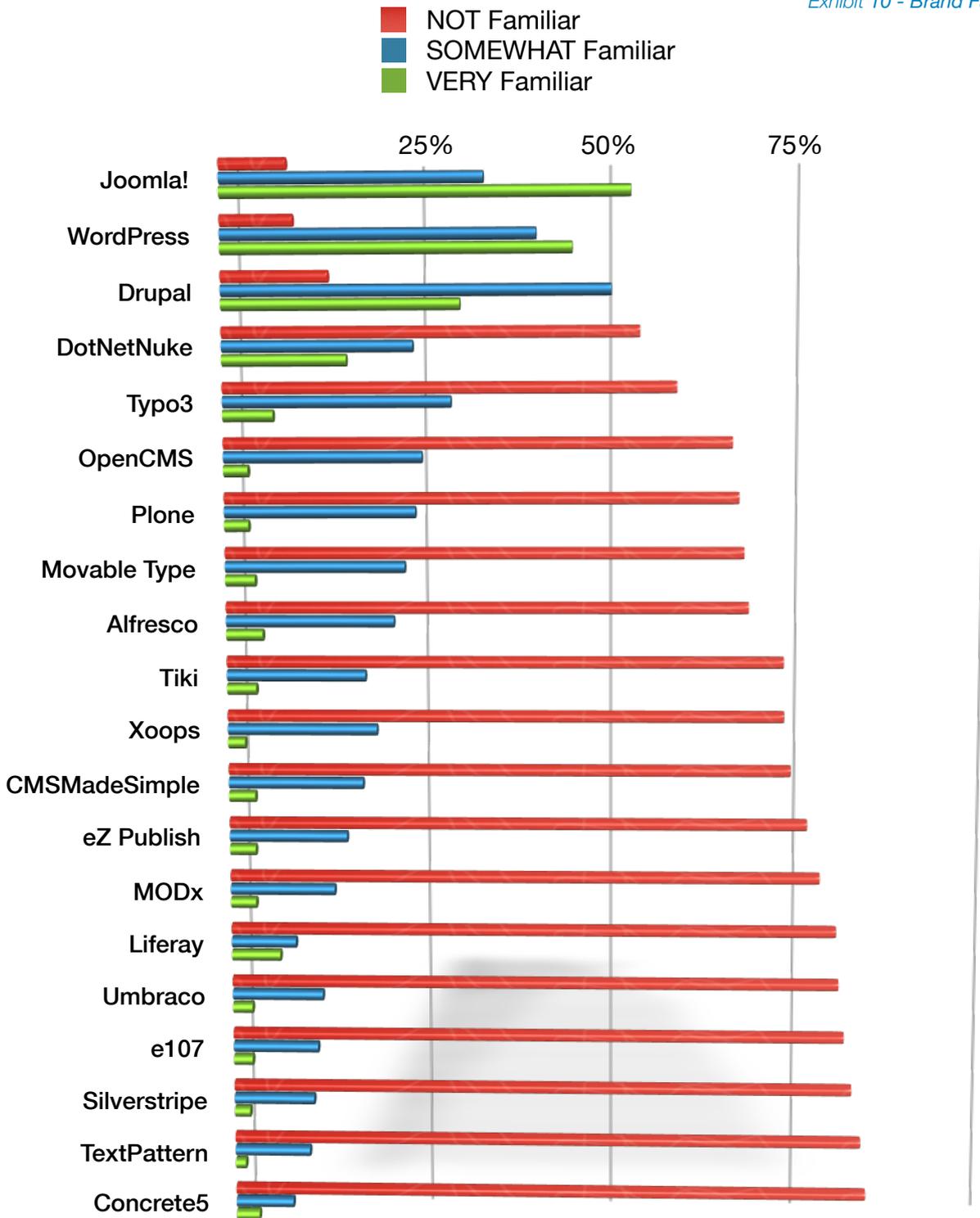
- **Brand Familiarity**
- **Search Engine Query Volume**
- **Share of Voice**

## Brand Familiarity

### **How recognizable are the brands in our survey?**

Familiarity with a product derives from either experience with the product or exposure to the brand and product message. As such, familiarity gives us a strong indicator of mindshare.

Our survey queried the participants on their familiarity with each of the brands in the survey set. For this question, we gave the survey respondents three answers choices to chose from: *Not Familiar*, *Somewhat Familiar*, and *Very Familiar*. The results appear in the chart on the next page.



### Exhibit 10: Notes on Interpretation

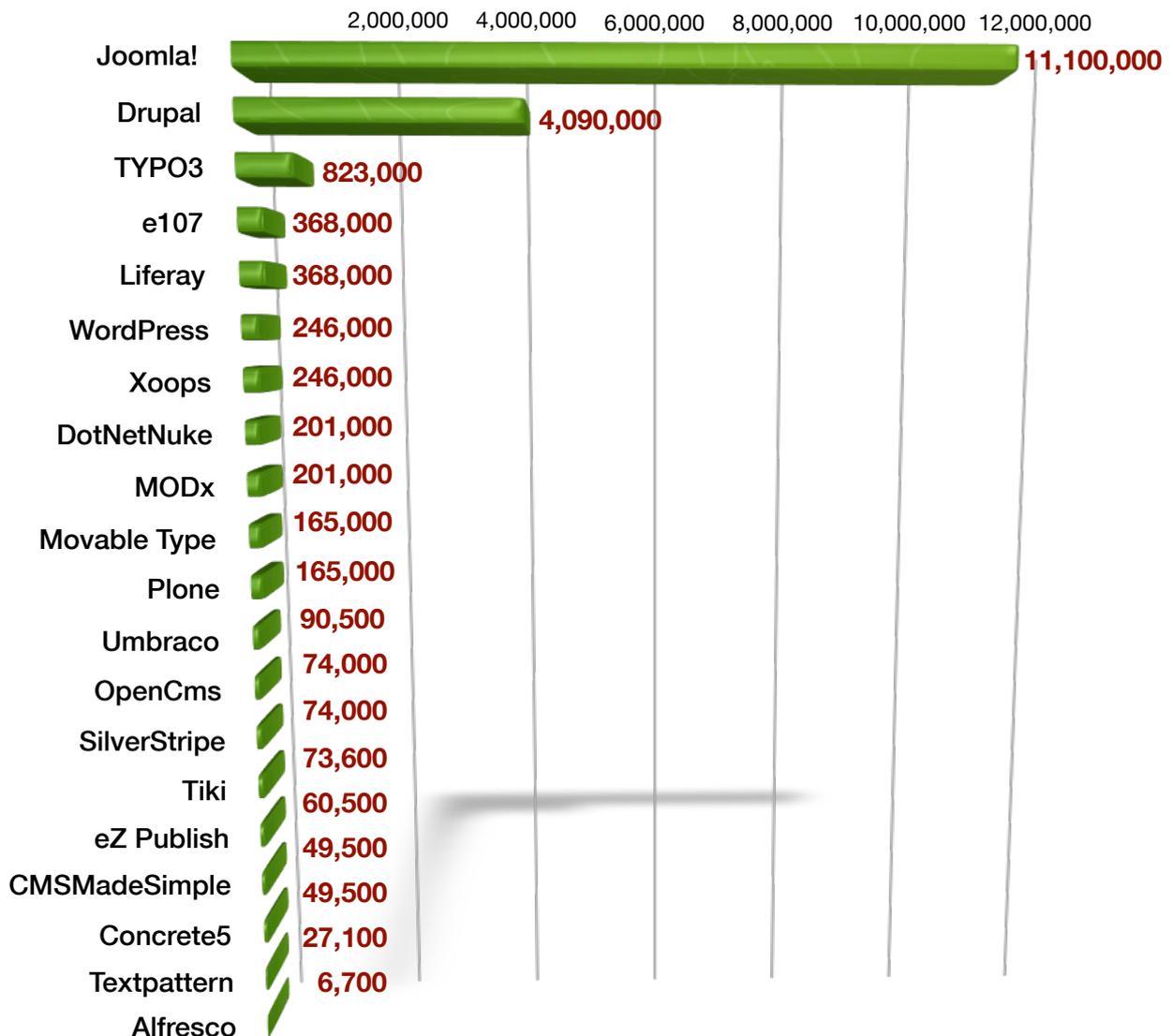
- Number of respondents: 2,833
- Only the Big Three show familiarity by more than 50% of the survey respondents.
- Only 9.2% said they were not familiar with **Joomla!**. **WordPress** ranked very closely at 10.0%. **Drupal** came in at 14.7%
- The gap between the Big Three the nearest performing brand, **DotNetNuke**, is huge, with 57.2% of respondents saying they are not familiar with the system ranked fourth, **DotNetNuke**.

## Search Engine Query Volume

### Which brand are people searching for?

Search engine activity levels provide another indicator of interest levels and mindshare. Given Google's dominant role in the global search market in general and in English in particular, we looked to user behavior on Google for this metric<sup>11</sup>.

Exhibit 11 - Google Query Volume



### Exhibit 11: Notes on Interpretation

- Limitations: **WordPress**, **Alfresco**, **MODx** and **Movable Type** are likely under-represented here due to the issues outlined in the Methodology section of this paper.
- Trend: **CMSMadeSimple** volume is up 234% over the 2009 Report.
- Trend: **Drupal**, **eZ Publish** and **Umbraco** volume has nearly doubled since 2009 Report.
- Trend: **DotNetNuke**, **OpenCMS**, **Textpattern**, **Tiki**, **Xoops** all show decreases in query volume over 2009.

<sup>11</sup> Google captured over 65% of total global search volume for the month of July, 2009. See, [http://comscore.com/Press\\_Events/Press\\_Releases/2010/9/comScore\\_Releases\\_August\\_2010\\_U.S.\\_Search\\_Engine\\_Rankings](http://comscore.com/Press_Events/Press_Releases/2010/9/comScore_Releases_August_2010_U.S._Search_Engine_Rankings)

## Share of Voice

### What brands were people talking about in 2010?

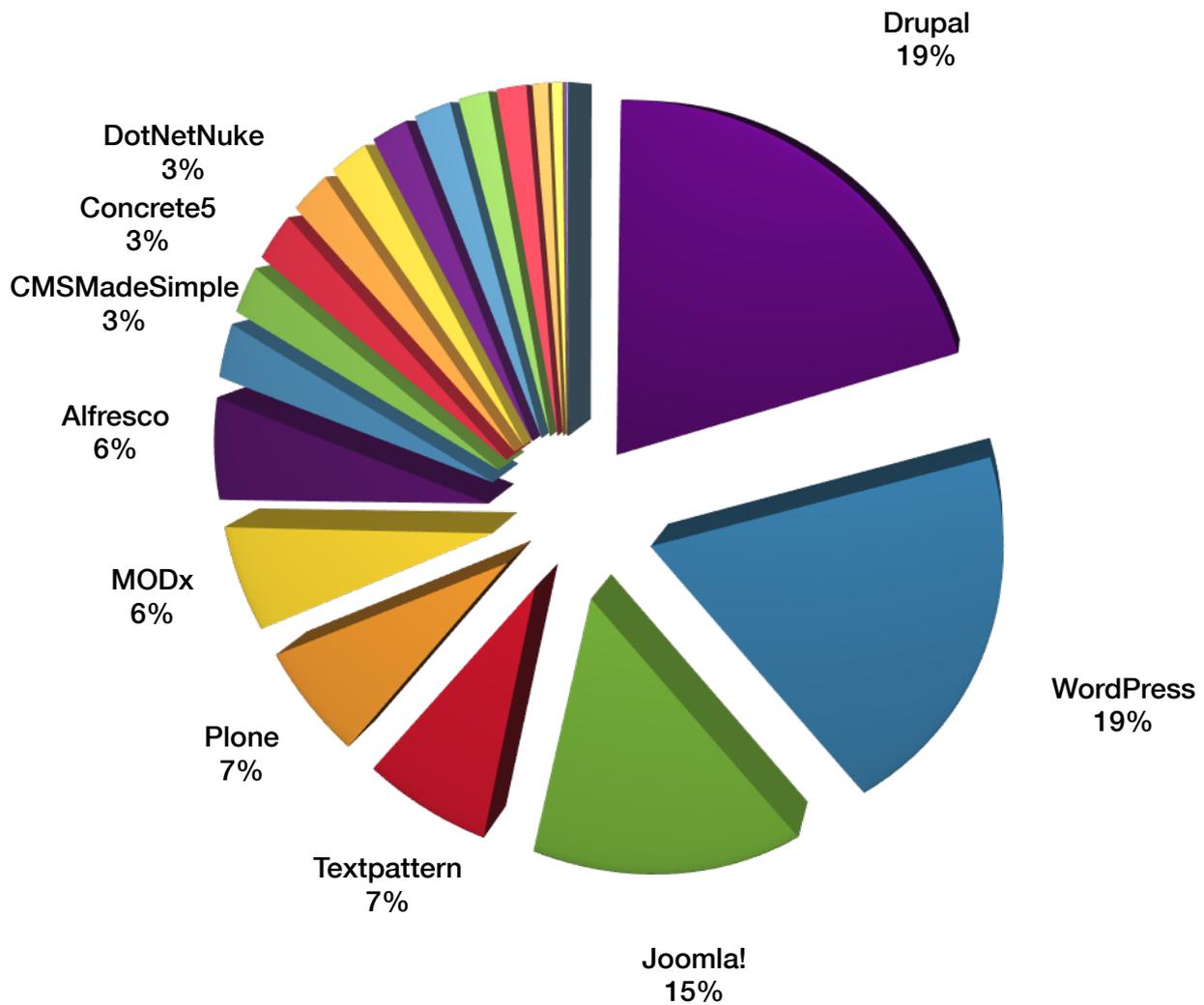
Traditional media metrics looked to column inches to gauge press coverage. To determine media exposure today, particularly in light of the increasing emphasis on social media, we need to look instead at mentions. In this section we try to discover which of our systems are receiving the greatest number of mentions across a variety of social media channels. The charts below cover the following areas:

- **Social Bookmarking**
- **Blogs**
- **Twitter**
- **Facebook**

## Social Bookmarking

To determine share of voice in the social bookmarking space we aggregated total bookmarking activity for the project sites on Delicious<sup>12</sup>, Digg<sup>13</sup> and Reddit<sup>14</sup>. The results are shown in Exhibit 12, below.

Exhibit 12 - Share of Voice: Social Bookmarking



### Exhibit 12: Notes on Interpretation

- The Big Three dominate this metric, with **Drupal** and **WordPress** essentially tied.
- Systems not shown had less than 3% share of voice.
- Laggards: **e107**, **OpenCms**

<sup>12</sup> See, <http://www.delicious.com/>

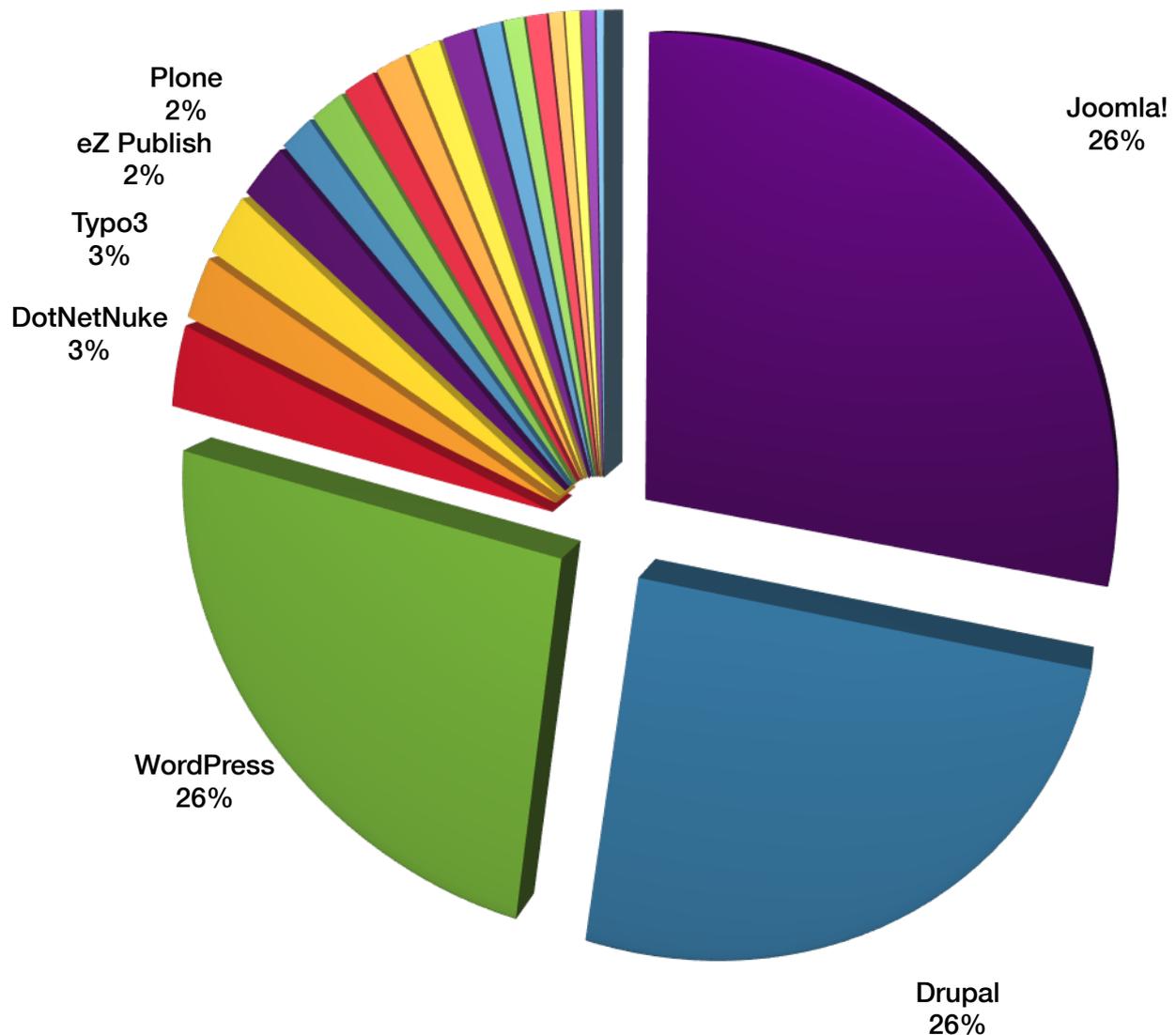
<sup>13</sup> See, <http://www.digg.com>

<sup>14</sup> See, <http://www.reddit.com>

## Blogs

The chart below shows the share of voice of each of the brands in the blogosphere in 2010.

Exhibit 13 - Share of Voice: Blogs



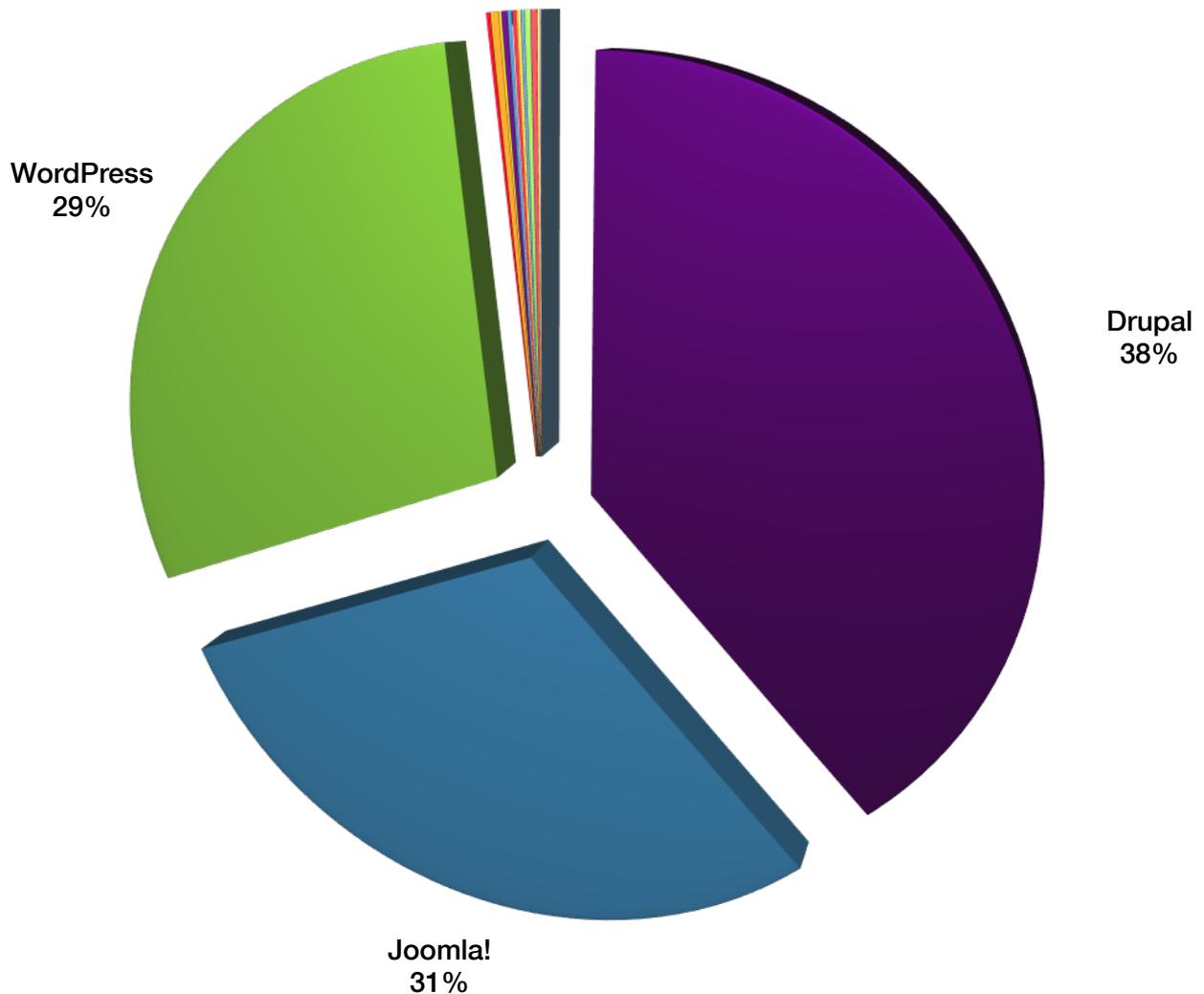
### Exhibit 13: Notes on Interpretation

- Data is from Google Blog Search, worldwide, in English only, for the 12 months period ending 1 December 2010. Blogs originating from wordpress.com were excluded from the search results to avoid distortion from the WordPress hosted blogging service.
- The Big Three were essentially tied for this 12 month period. **Joomla!** enjoyed a slight lead in raw numbers.
- Systems not listed in the chart above had less than 2% share of voice.

## Twitter

In 2010, Twitter retained its dominance of the micro-blogging category. We looked to Google search to provide us with insight into the prominence of each the various open source CMS brands on Twitter in 2010. The results are shown in Exhibit 14, below.

Exhibit 14 - Share of Voice: Twitter



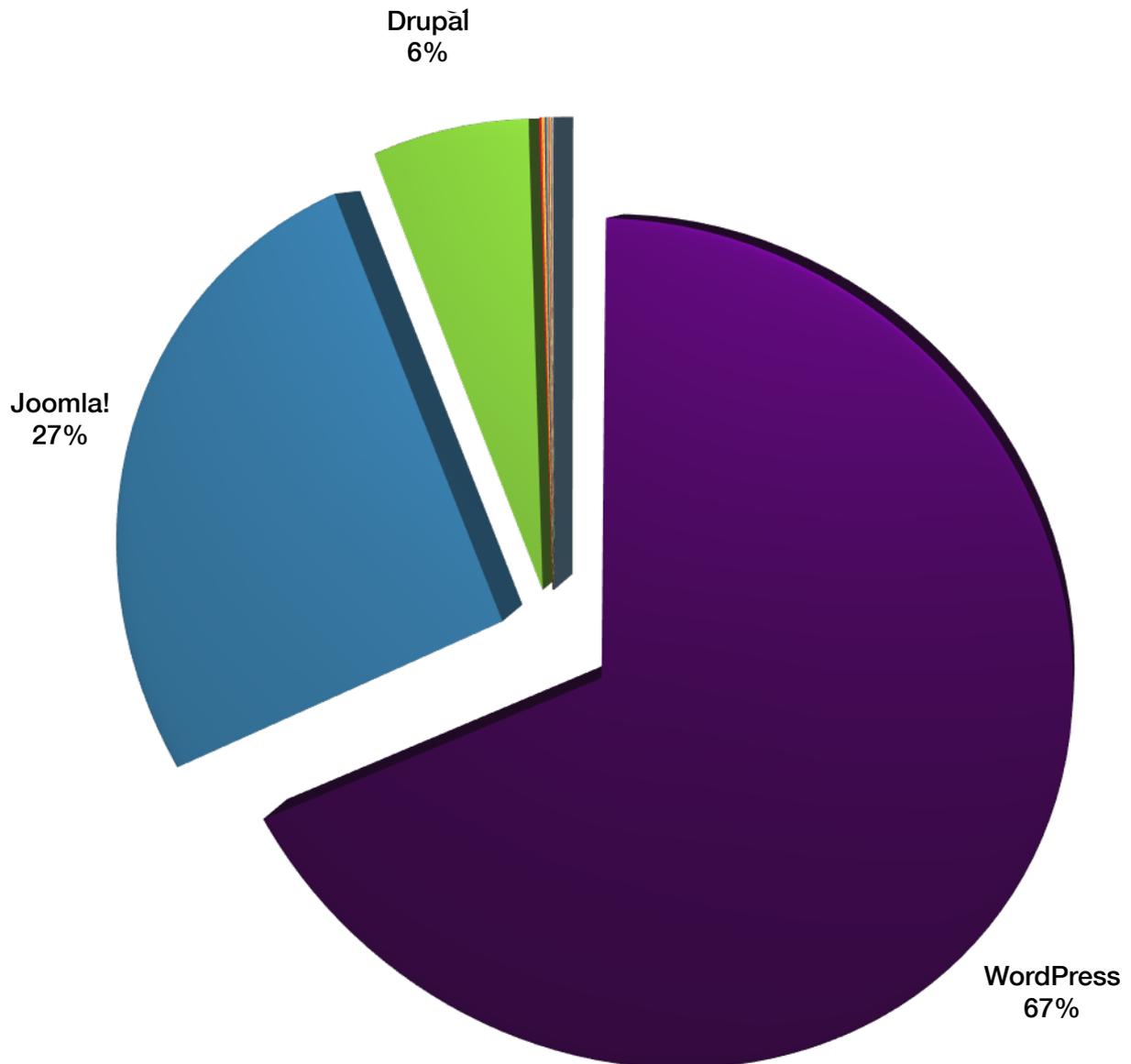
### Exhibit 14: Notes on Interpretation

- Data is from a domain-specific search on Google, worldwide, in English only, for the 12 months period ending on 1 December 2010.
- The Big Three completely dominate this metric, accounting for 98% of mentions during the preceding 12 months.
- The other 17 systems account for the remaining 2% of mentions.

## Facebook

In terms of social media, 2010 belonged to Facebook. We searched Facebook for mentions of the brands in this year's survey, in an attempt to see who had captured the attention of this large and diverse population.

*Exhibit 15 - Share of Voice: Facebook*



### Exhibit 15: Notes on Interpretation

- Data is from a domain-specific search on Google, worldwide, in English only, for the 12 months period ending on 1 December 2010.
- **WordPress** leads **Joomla!** by a margin of better than 2:1. **Drupal** is a distant third. The other systems fare even worse.
- The other 17 systems share less than 1% of mentions on Facebook during the period.

## Reputation

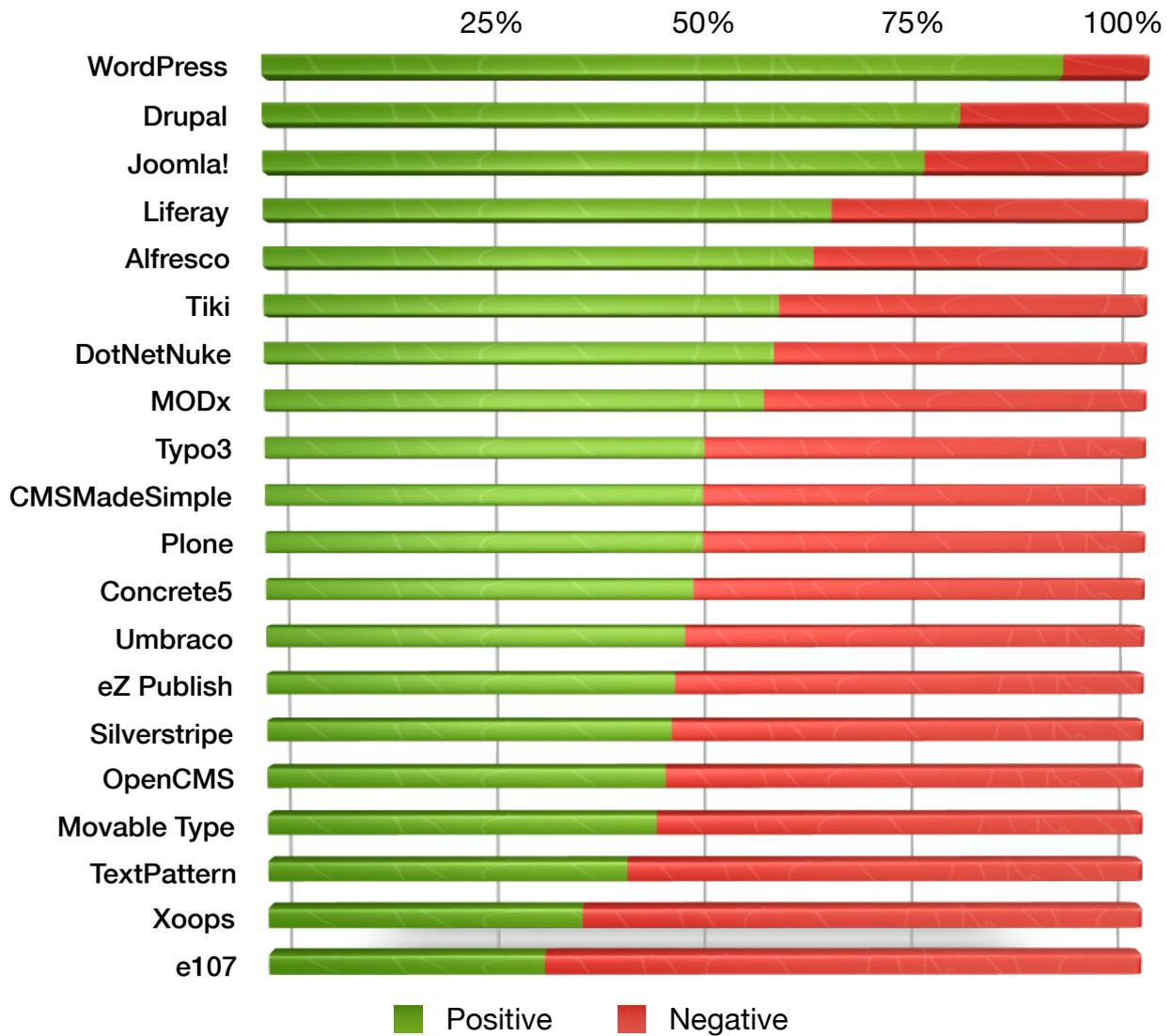
The relative reputation of the systems gives significant insight into the strength of the various brands. For indicators of project reputation, we looked at:

- **Brand Sentiment**
- **Conversion Rate**
- **Abandonment**
- **Product Preference**
- **Inbound links**

## Brand Sentiment

This year's survey allowed us to query respondents directly about their feelings toward each of the brands in our sample set.

Exhibit 16 - Brand Sentiment



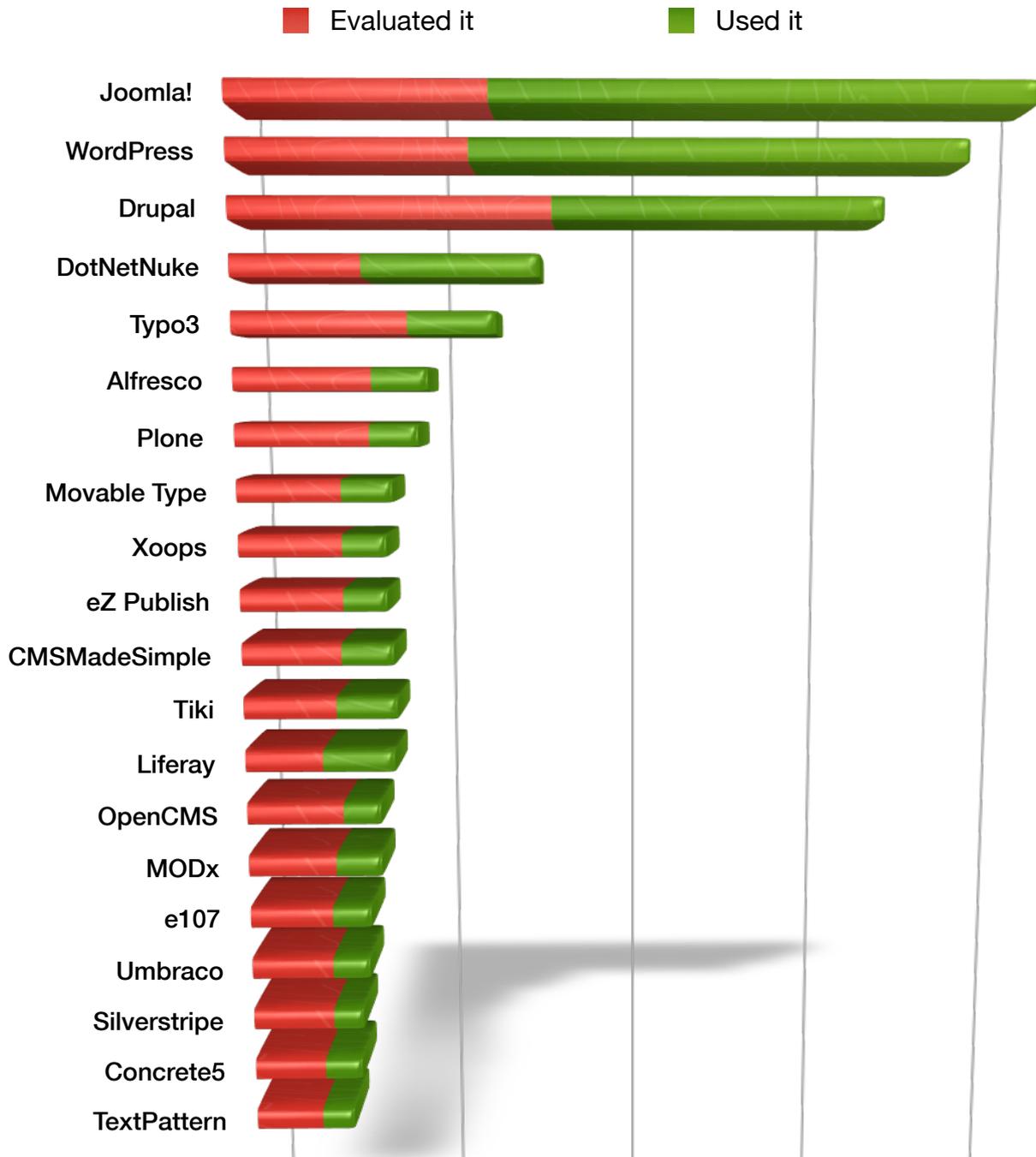
### Exhibit 16: Notes on Interpretation

- Number of respondents: 2,833
- Respondents were asked to indicate for each system whether their feelings toward it were *Positive*, *Negative* or *Neutral*. Respondents were instructed to respond *Neutral* if they were not familiar with the brand.
- The chart above removes all *Neutral* responses and shows as a ratio the number of *Positive* to *Negative* responses.
- **WordPress** enjoyed a significant lead over all systems, with almost 9 out of 10 respondents indicating they felt *Positive* about the brand.
- Laggards: **e107** and **Xoops**.

## Conversion Rate

In an attempt to find out which of the systems were most successful in converting trial users to actual users, we asked our respondents how many had evaluated each system and whether they had subsequently used it, either now or in the past.

Exhibit 17 - Conversion Rate



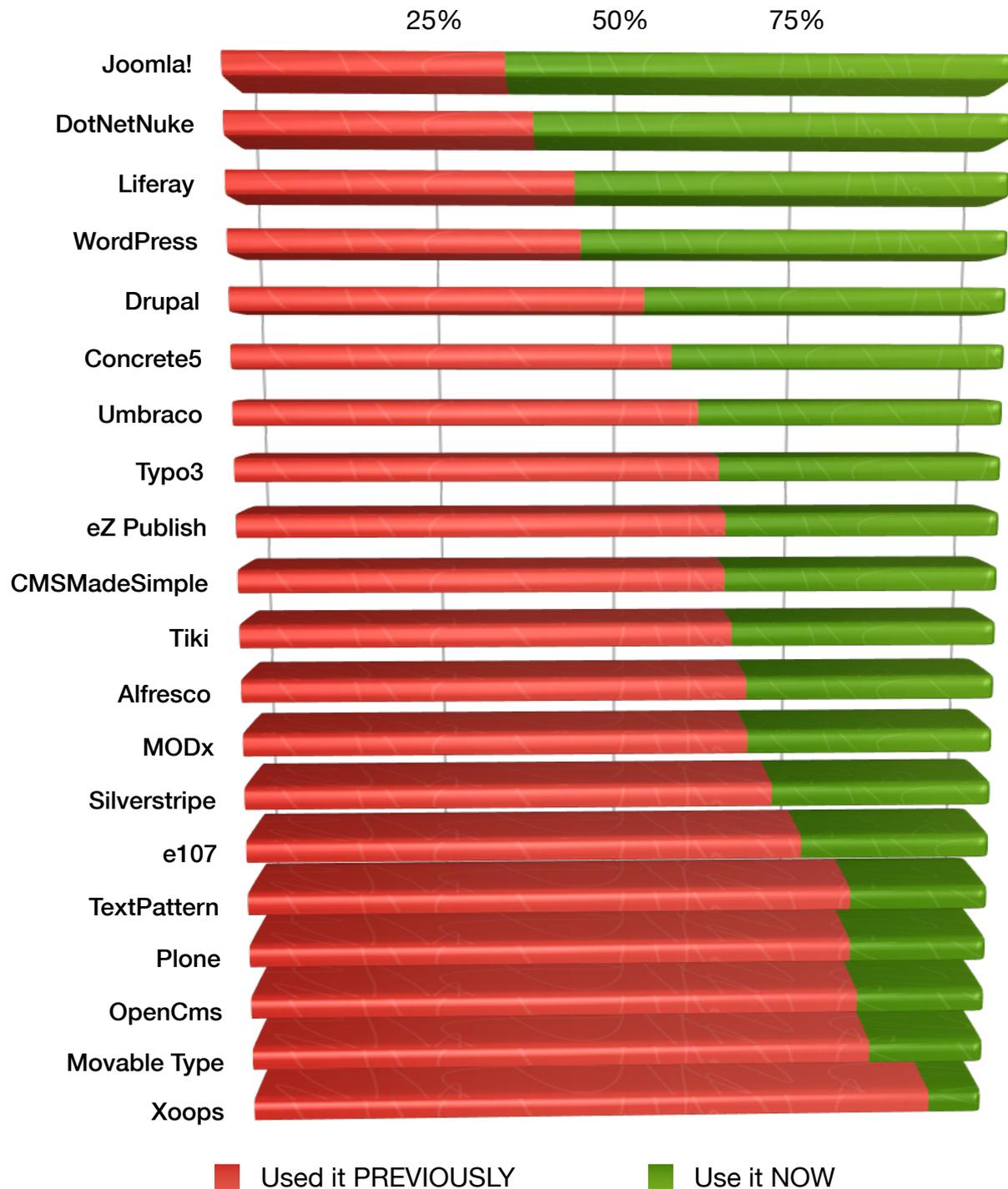
### Exhibit 17: Notes on Interpretation

- Number of respondents: 2,833.
- Laggard: **Plone**, by a significant margin.

## Abandonment

In an attempt to ascertain brand loyalty, we asked whether the respondents had used each system in the past and whether they continue to use that system at present.

Exhibit 18 - Abandonment Rate



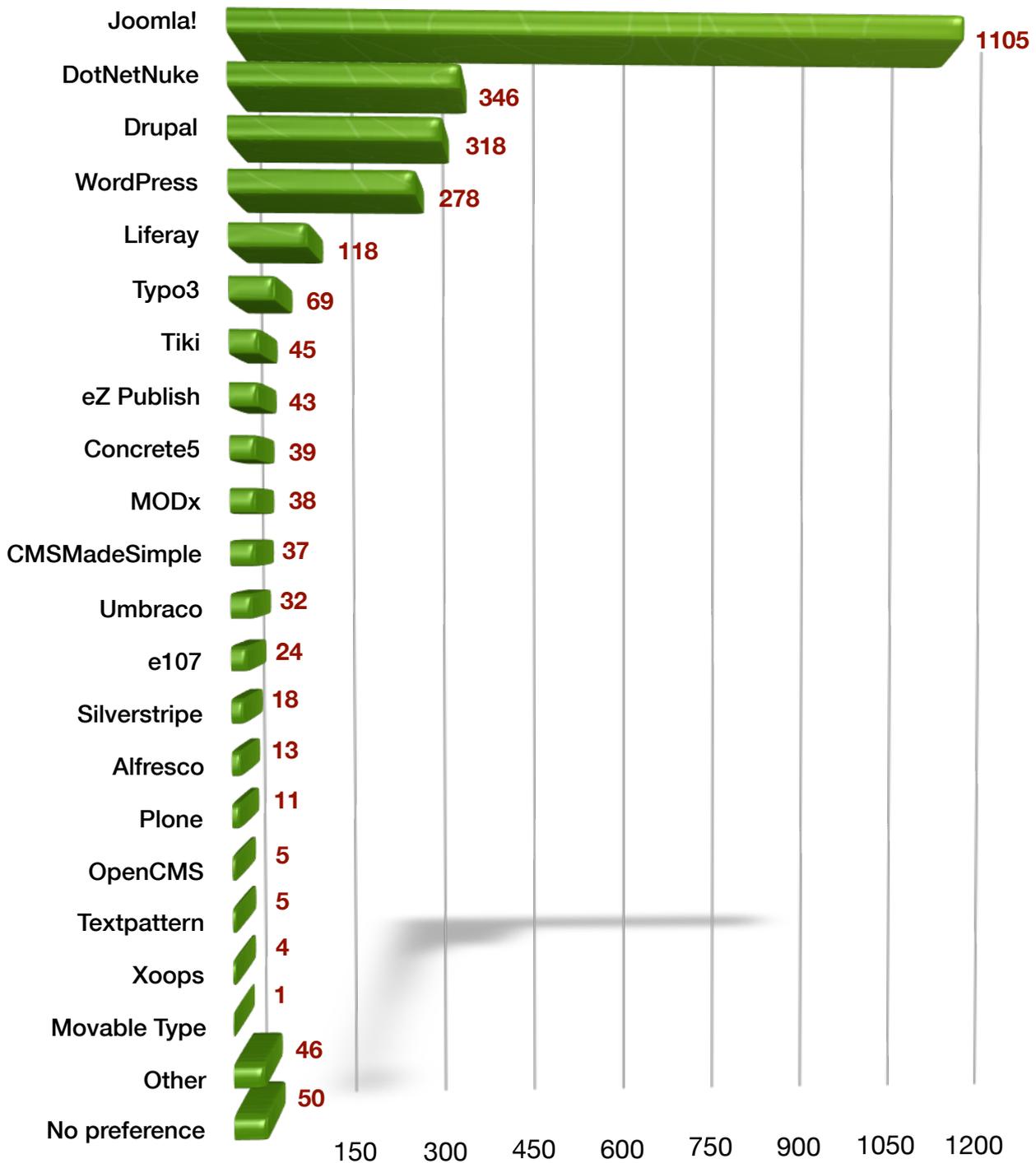
### Exhibit 18: Notes on Interpretation

- Note the number of respondents vary from 359 (**Textpattern**) to 2,358 (**Joomla!**). The numbers above are normalized to express a ratio.
- Laggards: **Movable Type, OpenCms, Plone, Textpattern, Xoops.**

## Product Preference

We asked our survey participants if they had a preferred CMS and if so, which one. The results are shown below.

Exhibit 19 - Preference



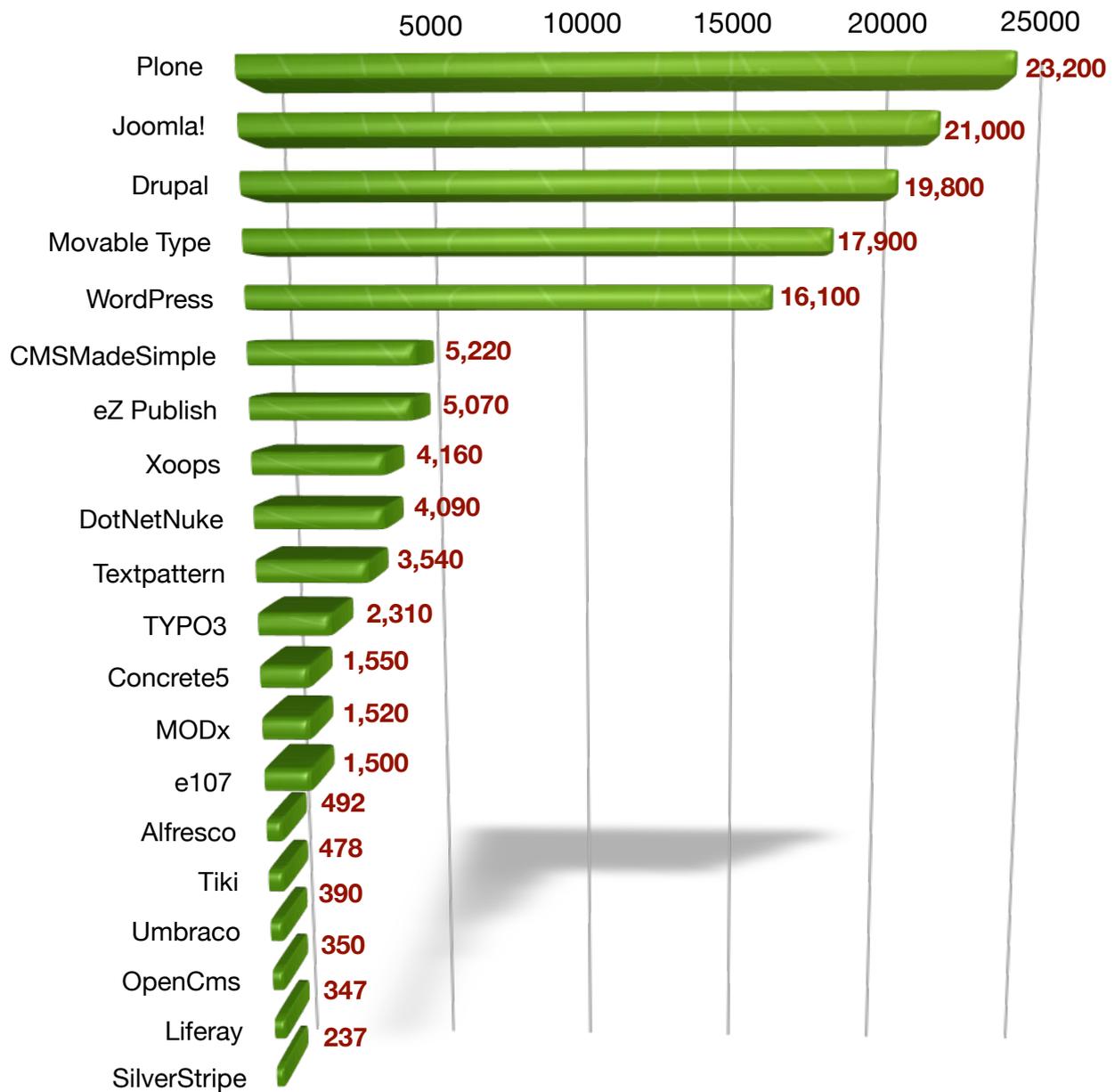
### Exhibit 19: Notes on Interpretation

- 46 of the respondents indicated they preferred a system not included in the final selection set.
- 50 of the respondents had no preference among the systems listed.
- Compare these results with those shown in Exhibit 19.
- Laggards: **Alfresco, Plone, OpenCms, Textpattern, Xoops, Movable Type**

## Inbound Links

We view inbound links as a measure of good will. No one is forced to add links to another site; it is done in response to a request or because the site owner finds value in being associated with the project.

Exhibit 20 - Inbound Links



### Exhibit 20: Notes on Interpretation

- Link totals are significantly different than in the 2009 report, due to changes Google made in May 2010 to the method they use to calculate inbound links.
- Laggards: **Alfresco, Tiki, Umbraco, OpenCms, Liferay, SilverStripe**

# Conclusions

**AD** FULL SERVICE  
**Digital Agency**

- web design
- print design
- corporate ID & branding
- online marketing
- social media marketing
- search engine optimization



# Conclusions

The final part of this Report is concerned with synthesizing the data from the previous sections and putting that data into context with the historical trends that show the evolution of the market. The discussion is broken into two parts:

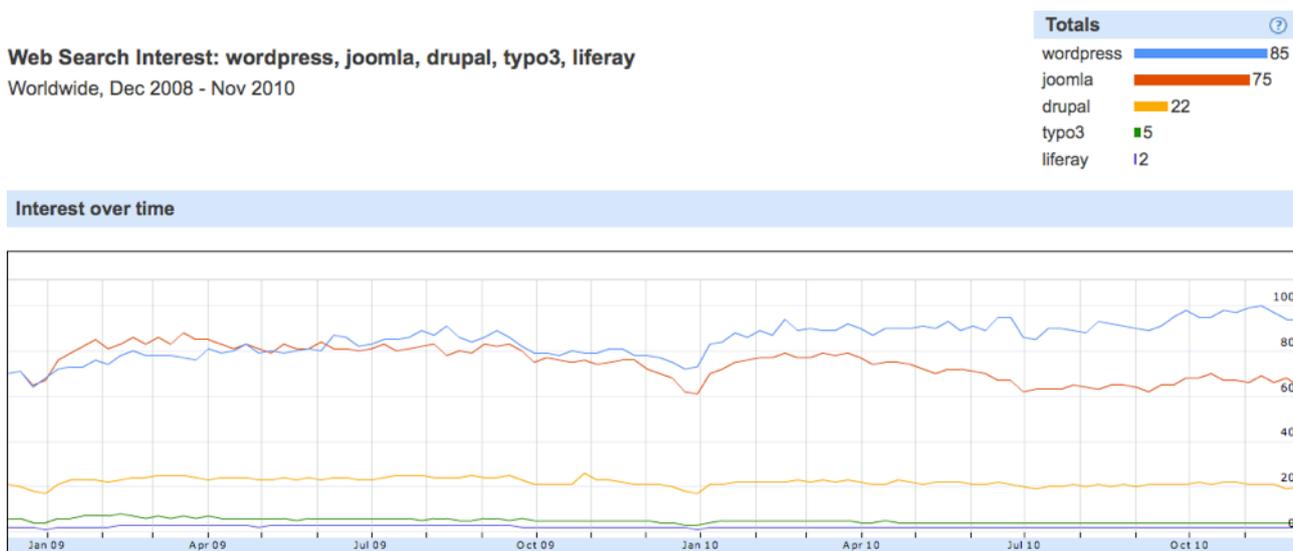
- **The Market Leaders**
- **Systems to Watch**

## The Market Leaders

For the third year running, **WordPress**, **Joomla!** and **Drupal** dominate the market share and brand strength ratings in the open source CMS market. The Big Three lead in almost every metric and we have seen little this year to indicate that their leadership is being challenged in the near term.

A look at Exhibit 21, immediately below, shows a clear example of the sort of dominance enjoyed by the Big Three. In this chart, we see the levels of search interest for the five highest ranked systems<sup>15</sup> over the last 24 months. Note that the weakest of the Big Three -- **Drupal** -- still enjoys a four to one lead over the nearest competitor, **TYPO3**, and a more than TEN to ONE lead over the fifth ranked system, **Liferay**.

*Exhibit 21 - Top 5 Search Interest*



### Exhibit 21: Notes on Interpretation

- The variance between the top 5 in the chart above and the top 5 in Exhibit 11 is due to the different time frames involved.
- View this online: <http://goo.gl/vy8iu>

<sup>15</sup> That is, ranked in terms of query volume on Google.

The sort of dominance we see in Exhibit 21 is typical across the entire data set, with only a few exceptions. Within the Big Three there was one noteworthy shift: **WordPress** has taken a lead in several key metrics, including:

- search interest
- daily website traffic
- daily unique visitors
- daily page views
- downloads

Of that group of factors, search interest is probably the least persuasive, given the co-existence of the WordPress hosted blogging service. Nonetheless, what is interesting is the trend: In Exhibit 21, above, you will note that **WordPress** passed **Joomla!** in query volume in June of 2009 and the gap has continued to widen since that time. Exhibit 22, below, shows that the trend continued in 2010, with **WordPress** extending the lead over both **Joomla!** and **Drupal**.

*Exhibit 22 - Big 3 Search Interest*

**Web Search Interest: wordpress, joomla, drupal**  
Worldwide, Last 12 months

Totals	
wordpress	90
joomla	69
drupal	21



### Exhibit 22: Notes on Interpretation

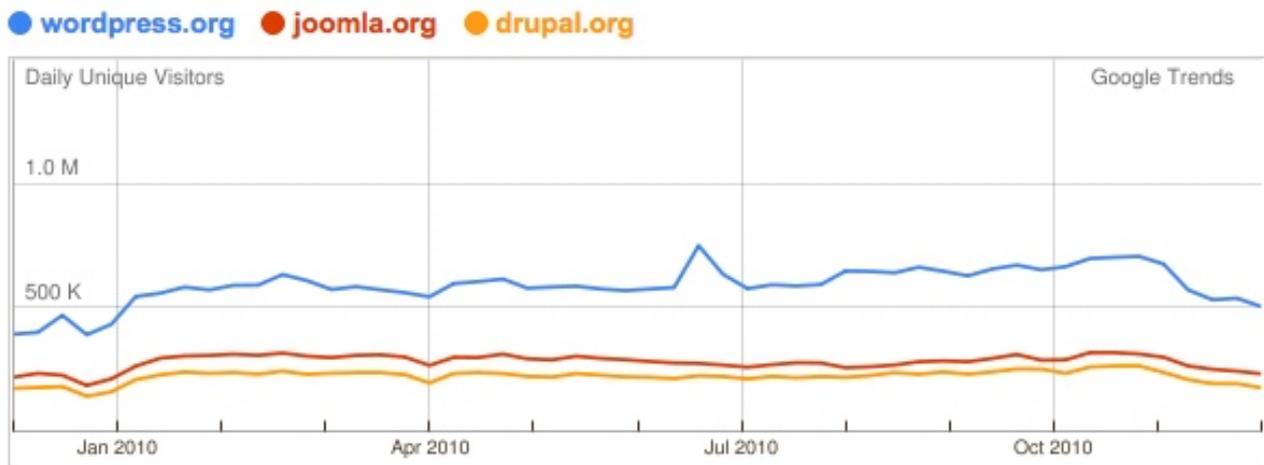
- Trend: WordPress interest increasing.
- Trend: Joomla! interest decreasing (slightly)
- View this online: <http://goo.gl/cd8Lq>

Of more significance are the statistics that relate directly to the traffic for the primary project sites. As seen in Exhibits 23, 24 and 25, below, wordpress.org traffic and pageviews outstrips both joomla.org and drupal.org. Most dramatic is Exhibit 25, which shows an increase of nearly 200% in pageviews for wordpress.org in 2010.



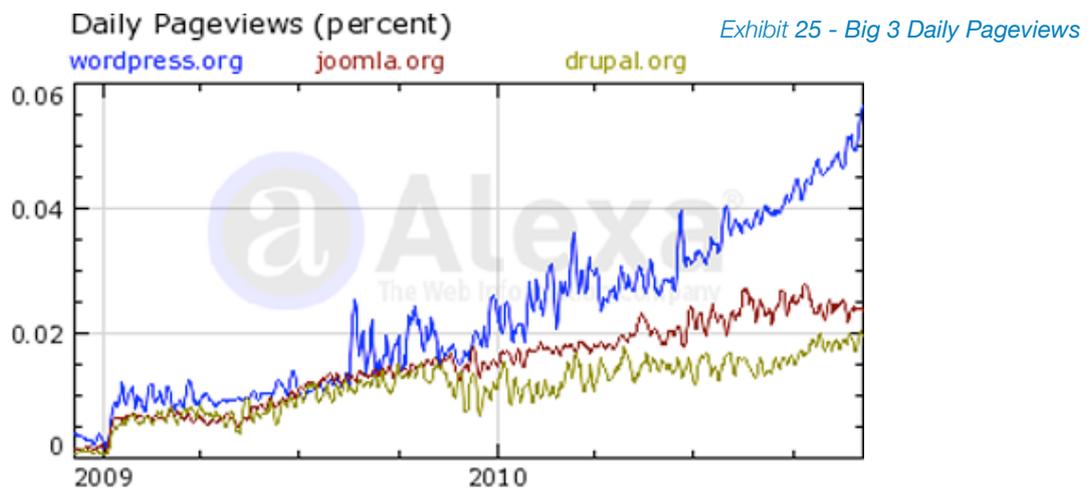
### Exhibit 23: Notes on Interpretation

- Trend: 2010 WordPress.org site traffic increasing significantly.
- Trend: 2010 Drupal.org site traffic increasing
- Trend: 2010 Joomla.org site traffic increasing (slightly)
- Source: Alexa.com



### Exhibit 24: Notes on Interpretation

- Differences are more subtle here, but you can still see a positive increase in the Wordpress.org numbers.



### Exhibit 25: Notes on Interpretation

- Trend: WordPress.org daily pageviews increasing significantly - up nearly 200% in 2010.
- Source: Alexa

The statistics on project site popularity need to be read in conjunction with other key numbers in this Report.

- **Downloads: WordPress** leads **Joomla!** by a rate of 8:1
- **Downloads (Trend):** The **WordPress** average weekly download rate more than doubled since last year, while **Joomla!'s** average rate appears to have decreased.
- **Third Party Support: WordPress** growth outpaces **Joomla!** in both the developers & publishers metrics.
- **Brand Sentiment: WordPress** leads the entire survey group by a significant margin.

When we add all this up, we reach the conclusion that for 2010, **WordPress** has moved into market leader role in the Open Source CMS space. We conclude that the system leads in key metrics for both rate of adoption and brand strength.

What accounts for the surge in **WordPress** brand strength this year? There is likely no single factor explaining the change, but we would attribute the success at least in part to the following:

- The success of **WordPress 3**. The newest major version release occurred in June of 2010. You can see clear spikes in activity in each of the Exhibits, above.
- The continuing popularity of the WordPress hosted blogging service.<sup>16</sup>
- A growing awareness in the market that **WordPress** is suitable for more than blogging.

<sup>16</sup> We speculated in last year's report that the release of Drupal Gardens may give Drupal a similar foothold in the market, but as of this date that system has yet to make an impact.

## The .NET Race

We see this year the continuation of a trend noted in last year's Report, that is, while **DotNetNuke** is clearly the .Net market leader, **Umbraco** is closing the gap.

**DotNetNuke** shows notable strength in a number of areas in this Report, particularly in the rate of adoption metrics. We see a significant number of Installations and developer support is very strong.

Nonetheless, the gap between **DotNetNuke** and **Umbraco** is narrowing in several areas. While **Umbraco** still lags significantly in Downloads and Installations, their numbers are growing. **Umbraco** is discussed further in the section below on *Projects to Watch*.

Google web search interest provides us with one of the most dramatic visual indicators of the trend. Exhibit 26, below shows search interest in **DotNetNuke** and **Umbraco** across the last 24 months.

Exhibit 26 - .NET Search Interest

**Web Search Interest: dotnetnuke, umbraco**  
Worldwide, Dec 2008 - Nov 2010

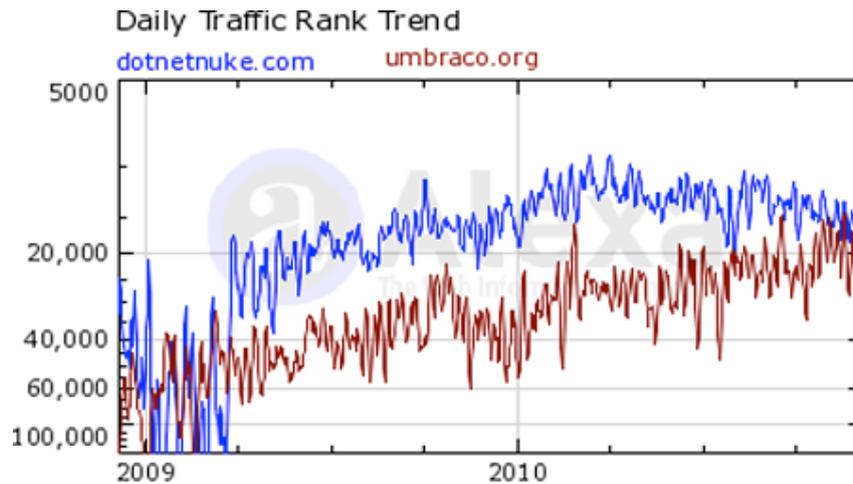
**Totals** ⓘ  
dotnetnuke 70  
umbraco 27



### Exhibit 26: Notes on Interpretation

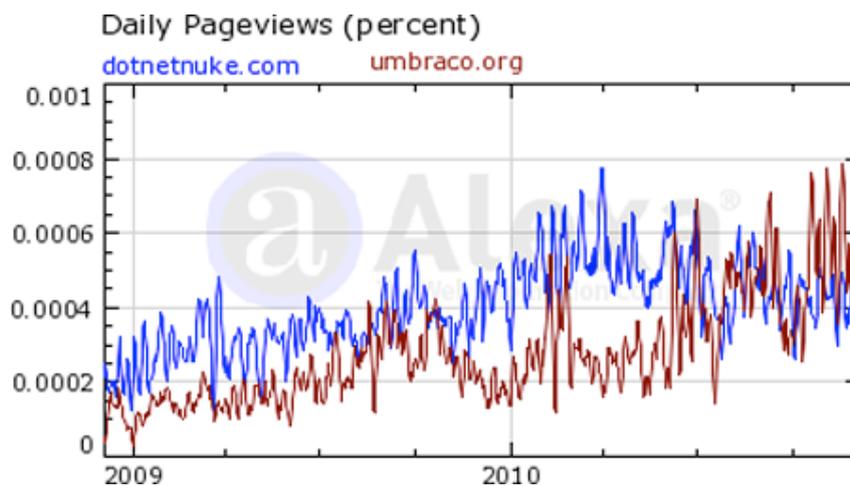
- Across the last two years, the gap between **DotNetNuke** and **Umbraco** has nearly closed; significantly, this appears to be largely due to a decrease in interest in **DotNetNuke**.
- View this chart online: <http://goo.gl/pOZ62>

Exhibits 27 and 28, shown on the next page, show similar trends in terms of daily traffic and pageviews for the primary project sites.



### Exhibit 27: Notes on Interpretation

- Source: Alexa.com.



### Exhibit 28: Notes on Interpretation

- Source: Alexa.com.

Despite the trends shown above, **DotNetNuke** remains in firm control over several key brand strength metrics. In terms of brand familiarity, **DotNetNuke** retains a significant lead over **Umbraco**: **DotNetNuke** finished fourth in that metric; Umbraco finished 17th. Share of voice metrics favored **DotNetNuke** across the board, but many of the gaps between the two were not significant.

Reputation metrics also favor **DotNetNuke**. One particularly bright area for **DotNetNuke** this year was brand sentiment. After finishing very poorly in that metric last year, **DotNetNuke** showed significant improvement in this Report.

In conclusion, the .NET race remains one of the most interesting in terms of changes from year to year. We will be looking carefully at this space across the next 12 months to see whether **Umbraco** is able to continue to close the gap and whether **DotNetNuke** can continue to grab and retain market share.

## The Java Race

This year's Report includes three Java-based content management systems: **Alfresco**, **Liferay** and **OpenCms**. Of the three, **Alfresco** and **Liferay** showed good strength across a number of metrics. **OpenCms**, however lagged in many categories. Given that these systems are focused on enterprise customers, they showed impressive strength in the web content management market. The WCM market is dominated by smaller companies (and individuals) who typically favor simpler, less powerful systems on the more accessible LAMP stack. Yet, despite an environment that does not play to their strengths, **Alfresco** and **Liferay** fared very well.

Exhibit 29, below, allows us to compare search interest in the three Java systems across the last two years. While **Alfresco** enjoys a very slight lead over **Liferay**, **OpenCms** finishes a distant third.

Exhibit 29 - Java Search Popularity

**Web Search Interest: alfresco, liferay, opencms**  
Worldwide, Dec 2008 - Nov 2010



### Interest over time



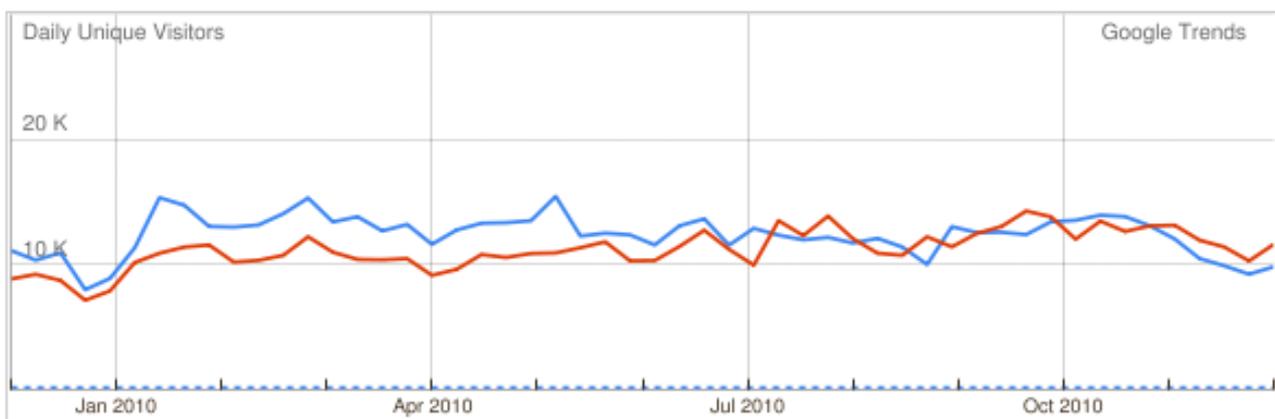
### Exhibit 29: Notes on Interpretation

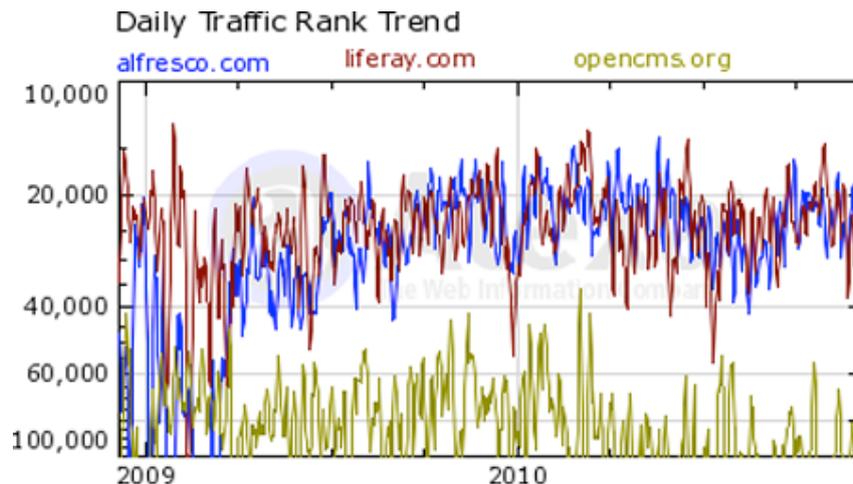
- **OpenCms** lags significantly behind **Liferay** and **Alfresco** across the entire period.
- Trend: **OpenCms** also shows signs of deterioration in interest levels.
- View this chart online: <http://goo.gl/FDoJl>

The pattern seen in Exhibit 29 remains consistent when we look at daily unique visitors to the three system's project sites (Exhibit 30, below) and also when we look at daily traffic on those sites (Exhibit 31, below).

● **alfresco.com** ● **liferay.com** ● **opencms.org**

Exhibit 30 - Java Project Site Unique Visitors





### Exhibit 31: Notes on Interpretation

- Source: Alexa.com.

While we feel comfortable concluding the **OpenCms** is the laggard in this group, the comparisons between **Alfresco** and **Liferay** are more complex. Though the project site traffic statistics, above, clearly show a close race between the two systems, when we look at other metrics, a leader begins to emerge.

- **Downloads:** **Liferay** leads **Alfresco** by more than 30%
- **Installations:** Our survey data shows **Liferay** leading **Alfresco** by a margin of 2:1
- **Third Party Support:** **Liferay** leads **Alfresco** in Developer Support, but the systems are too close to call in the Publishers metric.
- **Reputation:** Two key metrics -- Brand Sentiment and Abandonment -- give a clear advantage to **Liferay**.

Taken as a whole, we feel that **Liferay** comes out ahead in this analysis and accordingly, we conclude that **Liferay** leads the Java Web CMS Race in 2010. The margin is narrow and we will be watching this race in 2011 for signs of a shift.

## Projects to Watch

The survey revealed a number of systems that deserve to be watched in the near to medium term. Several of the systems in our survey group showed weakening in market share over time that force us to ask whether their day has passed. We also found several systems that showed increased brand recognition and improved market share.

We discuss briefly each of the three categories, below:

- **Gathering Strength**
- **A Closing Window of Opportunity?**
- **Projects at Risk?**

## Gathering Strength

Looking beyond The Big Three for a moment, we found two other systems in our survey that exhibit strength, growing interest, and in some cases solid market share.

In the section we look briefly at:

- **Concrete5**
- **Umbraco**

*Exhibit 32 - Search Interest: Concrete5 and Umbraco*



### Exhibit 32: Notes on Interpretation

- Shows historical search query interest on Google.com since 2004
- View this chart online: <http://goo.gl/hTWDo>

## Concrete5

**Concrete5** is one of the newcomers to this year's Report. We looked at the system in 2009, but it failed to make the final 20 that were selected for the Report. Over the course of the last 12 months, the system has continued to grow in prominence and market share. While it came it at the bottom of many of this year's metrics, there were numerous growth indicators:

- **Installations:** Our survey data showed **Concrete5** ranked 10th in the number of total current installations. The system also appeared in the data gathered by both of the third party installation assessments<sup>17</sup>. A very strong showing for a young system.
- **Third Party Support:** **Concrete5** showed the largest growth of any system in the Report in the Developer Support metric<sup>18</sup>.
- **Search Engine Visibility:** The project site shows the largest gain of any system in the survey.
- **Project Site Popularity:** **Concrete5** finished 7th, a further indicator of strong market interest.

<sup>17</sup> CMS installations among the Alexa One Million (see Exhibit 3) and the Quantcast One Million (see Exhibit 4).

<sup>18</sup> Significantly, it was the leader on on both Elance and Guru (see Exhibit 5).

- **Mindshare:** Despite being a newcomer, **Concrete5** finished 9th in the blog share of voice metric.

Though the system finished in the middle to the bottom of the pack in many metrics in the Brand Strength category, we think this is more likely a by-product of the relative youth of this system -- it has only been in the market in its present form since 2008<sup>19</sup>. We feel the future looks bright for **Concrete5**.

## Umbraco

Another system worth watching is the .NET contender **Umbraco**. In addition to the trend we highlighted in *the .NET CMS Race* section, above, the following factors cause us to label **Umbraco** as a CMS that is gathering strength:

- **Third Party Support:** **Umbraco** is also one of the three fastest growing systems in the developer support metric.
- **Project Site Popularity:** As seen in Exhibits 27 and 28, above, daily visitor traffic and pageviews show strong growth. This is corroborated by the trend in PageRank and Alexa stats seen earlier in this Report. Since the 2009 Report, Umbraco.org's PageRank increased from 5 to 6<sup>20</sup> and the site's Alexa ranking improved significantly: from 17th position in last year's survey set to 9th in this year's<sup>21</sup>.

The field of competitors for mindshare in the .NET open source CMS market is, admittedly, limited. Nonetheless, we feel **Umbraco** continues to make progress and will become an increasingly strong competitor for market leader **DotNetNuke** in 2011.

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<sup>19</sup> See, <http://www.concrete5.org/about/history/>

<sup>20</sup> See, Exhibit 8.

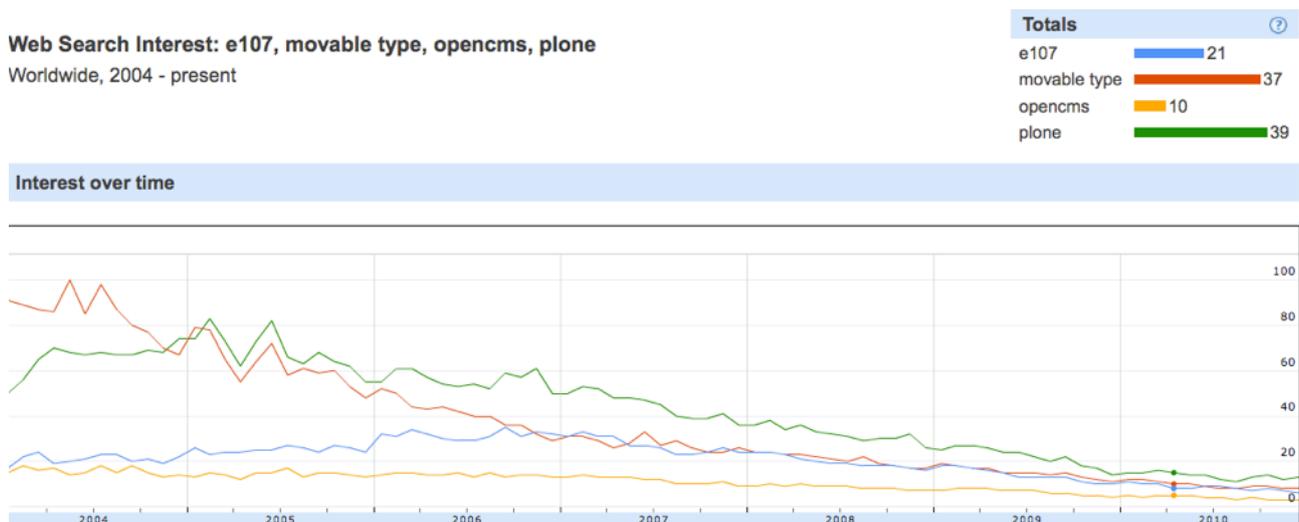
<sup>21</sup> See, Exhibit 9.

## A Closing Window of Opportunity?

Survey data indicated that several systems were struggling to maintain market share. In the section we look briefly at:

- **e107**
- **Movable Type**
- **OpenCms**
- **Plone**

Exhibit 33 - Fall in Search Interest Levels



### Exhibit 33: Notes on Interpretation

- Shows historical search query interest on Google.com since 2004
- View this chart online: <http://goo.gl/R1PuM>

### e107

**e107** fared poorly in a number of metrics in this year's Report. In terms of rate of adoption we saw the following:

- **Downloads:** A drop of over 27% from last year's numbers.
- **Installations:** Compared with last year's survey results, **e107** installations dropped by over 50%
- **Third Party Support:** Figures show low to no growth compared to 2009.

Brand strength indicators were no better, with the system finishing in the bottom five for both project site popularity and brand familiarity. Search query volume, however, remained strong -- the one bright spot in the report. Reputation indicators were the most troubling area for **e107**:

- The system finished last in brand sentiment, with 70% of the respondents indicating that they felt *negative* about the system.
- **e107** also had one of the higher abandonment rates reported, with more than 75% of the respondents who had used the system previously indicating that they no longer use the system.

## Movable Type

This was the first year in the Report for **Movable Type**. Unfortunately, the data we gathered showed signs of deteriorating market share. We feel the system faces challenges in several areas.

- **Project Site Popularity:** **Movable Type** finished 19th out of the 20 systems -- next to last.
- **Brand Sentiment:** The system finished in the bottom 5.
- **Abandonment:** **Movable Type** had the second highest abandonment rate.
- **Product Preference:** **Movable Type** was rated last by the survey respondents -- only 1 person out of more than 2,000 indicated that **Movable Type** was their preferred CMS<sup>22</sup>.

On the positive side of things, **Movable Type** retains a significant number of installations, finishing well in both of the third party measures of adoption<sup>23</sup>. The question would seem to be whether the project is able to turn around the negative trends related to the brand's reputation and remain a player in the present market<sup>24</sup>.

## OpenCms

We list **OpenCms** in this section due to two factors:

- The system is being squeezed by **Alfresco** and **Liferay**, who are, at present, dominating the Java CMS race.
- **OpenCms** project site popularity was the lowest of any in the system -- by a significant margin. Our concerns on this point are reinforced by indications of decreasing search query interest, as shown in Exhibit 33, above.

In short, the system is in a highly competitive space and is faced with two strong competitors. It's a rough spot to be in and one that will challenge **OpenCms** in the near to medium term.

## Plone

For the third year running, we include **Plone** in this section of the Report<sup>25</sup>. As noted last year, in a world dominated by PHP, .NET, and Java, **Plone's** reliance on Python and the Zope framework limits the system's broader appeal.

We include **Plone** in this year's *Closing Window of Opportunity* due to two key metrics in this Report:

- **Conversions:** **Plone** showed the lowest conversion rate of any system in the survey, by a significant margin. Put another way, people tried it, but didn't like it enough to adopt it for their use. This failure to convert evaluation users into installations presents a significant challenge for the project.

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<sup>22</sup> See, Exhibit 19.

<sup>23</sup> See, Exhibits 3 and 4.

<sup>24</sup> At this point we should also mention the presence of a fork of the **Movable Type** code. The new project, named **Melody**, seems to have absorbed a great deal of the community. The impact of this fork on **Movable Type** market share will become clearer across the next 12 months. To learn more, visit <http://openmelody.org/>

<sup>25</sup> We're actually thinking about making it a tradition...

- **Abandonment: Plone** showed the fourth highest abandonment rate in the survey, with more than 75% of the respondents who reported using the system previously indicating that they no longer use the system. This bodes poorly for the system's future.

We feel are certain that **Plone** has a dedicated cadre of die-hard fans, we feel it is going to take something more than that for the system to maintain it's place in today's market.

## Projects at Risk

In this section of the paper we raise the issue of whether one or more of our systems are at risk of being reduced to irrelevance -- at least in the big picture of market share. This year we single out two systems as projects that are potentially at risk:

- **Textpattern**
- **Xoops**

### Textpattern

Exhibit 34 - Textpattern Historical Query Volume

#### Web Search Interest: textpattern

Worldwide, 2004 - present

Totals  
textpattern 47

#### Interest over time



### Exhibit 34: Notes on Interpretation

- Shows historical search query interest on Google.com since 2004
- View this chart online: <http://goo.gl/GqY4o>

We listed **Textpattern** as a Project at Risk in the 2009 Report<sup>26</sup>; we re-iterate that rating in this Report. Looking at the data set this year, we find **Textpattern's** slide has continued. We found low adoption rates, little growth in third party support, poor search engine visibility and surprisingly, low brand familiarity. The system also finished in the bottom five in other metrics, including project site popularity, brand sentiment, abandonment and product preference. There was, in short, little if any good news for the system in this Report. While **Textpattern** has

<sup>26</sup> In that report, we noted that the one bright spot was social media mentions. What we discovered in this course of this year's research was that the social media statistic reported in 2009 was distorted by a Textpattern widget that included links to Textpattern in every post. In other words, the one bright spot we thought existed was in fact rather less persuasive.

enjoyed good success in the past, we have to wonder about its continued vitality in this increasingly competitive market.

## Xoops

Exhibit 35 - Xoops Historical Query Volume



### Exhibit 35: Notes on Interpretation

- Shows historical search query interest on Google.com since 2004
- View this chart online: <http://goo.gl/wyoac>

In the 2009 Report, we raised the question of whether **Xoops** faced a closing window of opportunity, stating: “**Xoops** has lost much ground since 2005, and one has to wonder whether the trend is irreversible. Certainly there are positive signs and the system does retain some strength, but clearly something has to change at **Xoops** before it is too late.”

The 2010 research data did not to alleviate our concerns. Indeed, with **Xoops** finishing dead last in key metrics like downloads and installations, as well as having the highest reported abandonment rate, we fear the worst. There remain bright points -- good recognition and project site traffic figures -- but if nothing is done, that will not save this once successful project<sup>27</sup>.

<sup>27</sup> There is also an active fork of Xoops, ImpressCMS. This may be responsible for siphoning away some of the vitality of the original project. See, <http://www.impresscms.org>

# Project Sites

Project	Primary Project Site
Alfresco	<a href="http://alfresco.com">http://alfresco.com</a>
CMSMadeSimple	<a href="http://www.cmsmadesimple.org">http://www.cmsmadesimple.org</a>
Concrete5	<a href="http://www.concrete5.org/">http://www.concrete5.org/</a>
DotNetNuke	<a href="http://www.dotnetnuke.com">http://www.dotnetnuke.com</a>
Drupal	<a href="http://www.drupal.org">http://www.drupal.org</a>
e107	<a href="http://e107.org">http://e107.org</a>
eZ Publish	<a href="http://ez.no">http://ez.no</a>
Joomla!	<a href="http://www.joomla.org">http://www.joomla.org</a>
Liferay	<a href="http://www.liferay.com">http://www.liferay.com</a>
MODx	<a href="http://modx.com">http://modx.com</a>
Movable Type	<a href="http://www.movabletype.com/">http://www.movabletype.com/</a>
OpenCms	<a href="http://www.opencms.org">http://www.opencms.org</a>
Plone	<a href="http://plone.org">http://plone.org</a>
SilverStripe	<a href="http://www.silverstripe.org">http://www.silverstripe.org</a>
Textpattern	<a href="http://textpattern.com">http://textpattern.com</a>
Tiki CMS Groupware	<a href="http://info.tiki.org">http://info.tiki.org</a>
TYPO3	<a href="http://typo3.com">http://typo3.com</a>
Umbraco	<a href="http://umbraco.org">http://umbraco.org</a>
WordPress	<a href="http://wordpress.org/">http://wordpress.org/</a>
Xoops	<a href="http://www.xoops.org">http://www.xoops.org</a>

# About the Publisher

water&stone is a full service digital agency, located in Bali, Indonesia. The company is focused on helping clients realize increased value from the implementation of open source tools, in particular open source content management systems.

water&stone was formed in 2003, specifically in response to the growth and maturation of open source CMS solutions. Since that time, the team has delivered more than 400 web projects to clients located all over the world. As an indication of their expertise, many of the firm's clients are other web development and design studios located in Australia, the UK, North America and Europe.

In addition to web design and development, water&stone provides consultancy services, search marketing services, print design, logo design and branding.

## About the Author

The lead analyst on this report is Ric Shreves, who authored both the 2008 and 2009 Reports. Ric is one of the partner's at water&stone where he runs the consultancy and marketing disciplines. Ric is also a published author. In the past four years he has published books on the Mambo, Joomla! and Drupal content management systems.

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