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2011

OPEN SOURCE CMS

Market Share Report

4th annual report on the industry leaders

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TABLE OF CONTENTS

Executive Summary	7
Overview	7
Principal Conclusions	7
Preliminary Matters	8
What's Covered	8
What's Different This Year?	8
Methodology	8
What's Different This Year?	9
About the Survey	10
Measuring Rate of Adoption	12
Downloads	12
Installations	15
Survey Data	15
Third Party Analysis	17
Third Party Support	19
Developer Support	19
Books in Print	21
Measuring Brand Strength	24
Search Engine Visibility	24
Search Engine Ranking	24
Google PageRank	26
Project Site Popularity	27
Mindshare	28

Brand Familiarity	28
Search Engine Query Volume	30
Share of Voice	31
Social Bookmarking	32
Blogs	33
Twitter	34
Facebook	35
Reputation	36
Brand Sentiment	36
Conversion Rate	37
Abandonment	38
Product Preference	39
Inbound Links	40
Conclusions	42
The Market Leaders	42
The .NET Race	44
The Java Race	47
Projects to Watch	50
Gathering Strength	50
Concrete5	51
Cause for Concern	53
Joomla!	53
Plone	54
Projects at Risk	56
e107	56
Movable Type	57
Textpattern	59
Xoops	60

Project Sites	61
About the Publisher	62
About the Author	62
Contact Details	62

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, though **Joomla!** shows some a troubling decline in several key metrics
- In the .NET market, **DotNetNuke** continues to hold off contender **Umbraco**.
- The Java CMS race is too close to call, with **Liferay** and **Alfresco** fighting for market leadership.
- **Concrete5** had an exceptional year and remains a system to watch.
- Systems possibly at risk include: **e107**, **Movable Type**, **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 - 2011

(listed in alphabetical order)

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

This year's selection process began with 35 systems¹. Based upon our research and the survey responses, the list was narrowed to a final set of 20 systems that we believe accurately represents the Top 20 Open Source Content Management Systems².

What's Different This Year?

Despite expanding the preliminary set of systems under consideration, the final 20 systems that were selected stayed the same this year as last. We don't view that as indicating that the market has stagnated, or that there is no room for new players. Rather, as you will see in the data below, there was a significant amount of movement within the Top 20. Moreover, if you look beyond the market leaders, there is increasing competition. Indeed, the selection of the Final 20 this year was more difficult than in years past, with a number of systems showing improvements in market share. It seems to us that the market is both deeper and broader this year, and that open source is now clearly the rule of the day, rather than the exception.

Methodology

The data in this Report 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 a degree of confidence.

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

¹ Among the systems that were considered but ultimately eliminated: **Bricolage**, **dotCMS**, **Frog**, **Hippo CMS**, **Jahia**, **Magnolia**, **mojoPortal**, **nuxeo**, **phpWebSite**, **Pimcore**, **Radiant**, **SPIP**, **Squiz**, **Symphony**, and **Tomato**.

² A complete list of all the projects in the 2011 Report, with URLs to their primary project sites, can be found on the last page of this paper.

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 lack naming distinction, the **WordPress** numbers are sometimes susceptible to distortion. 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."
- In the case of **Alfresco** and **Movable Type** the issue is also related to the need to filter out irrelevant references. The problem here is that the company names are also terms in common usage. As with **WordPress**, above, if unchecked, this problem would result in over-reporting. In an attempt to filter out results of the term that are not related to the open source content management systems, we have sometimes used very specific queries, e.g., searching for the word "alfresco" with the string "cms."

Our approach to these problems is of mixed effectiveness. While the modified query strings tend to knock out irrelevant references, they also invariably 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.

What's Different This Year?

This is the fourth year we've produced this report. Over time, we have worked to refine our measurement techniques, and where technology improvements exist, we have tried to apply them.

There are changes to some of the measurements used last year. Among the most noteworthy:

- BuiltWith Trends³ has been monitoring the technology behind websites since 2008. We sampled BuiltWith Trends data for the 2010 report. Over the last year, their data set has become richer and broader and we have added their data to our adoption metrics and in our conclusion section.
- W3Techs⁴ is a service similar to BuiltWith. We use some of their data in the adoption section of the report.
- We changed the way we're counting publications in Amazon. The change is motivated by the proliferation of self-publishers. The books metric is intended to indicate publisher support for various systems, hence counting self-published titles was not entirely consistent. Accordingly, we eliminated all self-published titles, focusing exclusively on titles from publishing houses.

³ <http://trends.builtwith.com/cms>

⁴ <http://w3techs.com/>

About the Survey

Again this 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 2,500 persons responded to the survey⁵.

The survey was truly global in nature. Though the majority of the respondents came from North America and Europe, people from 86 countries participated.

size of firm	% of respondents
1 only	20.3%
2 - 10	32.9%
11-20	8.5%
21-50	9.1%
51-100	7.8%
101-250	6.2%
251-500	4.3%
501-1,000	2.4%
more than 1,000	8.4%

As the chart at left shows, most of the participants in this year's survey came from small firms⁶. Also of note:

- 84.3% of our respondents indicated that they were responsible for the selection of the CMS they currently use.
- 43.5% were die-hard loyalists, having used their present system for more than 3 years.
- 94.8% said that they would recommend their present system to others.

⁵ 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; (5) announcements on CMSWire.com. We would like thank Packt Publications and CMSWire for their continued support of this project.

⁶ This year's survey saw a slight shift towards larger firms. 53.1% of this year's participants came from firms with less than 10 persons; last year that number was slightly higher - 56.2%

2

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**

Of the three, the first two metrics give us a direct measure; the third, an indirect measure.

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 systems⁷
- 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
- downloads from Git are not considered, which leaves developer-centric systems (like Drupal), at a disadvantage
- not all systems count their secondary language distributions

⁷ This is, however, our best year yet in terms of download data; we have data we feel is reliable for 18 of the 20 projects in this year's Report. [See](#), Exhibit 1.

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

Exhibit 1 - Project Downloads

	Average Weekly Downloads '11	Source	Trend
WordPress	644,880	http://wordpress.org/download/counter/	-34.4%
Joomla!	86,547	spokesperson	-24.0%
Drupal	22,836	spokesperson	-32.2%
DotNetNuke	16,000	spokesperson	23.1%
Plone	9,250	spokesperson	n/a
TYPO3	9,043	spokesperson	21.2%
Liferay	7,038	spokesperson	-25.4%
eZ Publish	7,031	spokesperson	-
Alfresco	6,115	spokesperson	-12.6%
MODx	6,047	spokesperson	34.4%
Umbraco	5,135	http://umbraco.codeplex.com/stats	-5.3%
Concrete5	3,017	spokesperson	517%
CMSMadeSimple	2,658	spokesperson	-73.3%
e107	1,501	Sourceforge	-7.2%
SilverStripe	1,266	spokesperson	-47.6%
Xoops	999	Sourceforge	-28.0%
Tiki	889	spokesperson	-26.7%
Textpattern	641	spokesperson	n/a

Exhibit 1: Notes on Interpretation

- Trending: Strong growth from **Concrete5**. Note, however, that we believe our numbers for **Concrete5** in 2010 were probably low, which would account for some of the very steep increase we see in the 2011 trend.
- Trending: **e107** is the only system in the survey to show three consecutive years of decreasing downloads
- Information was unavailable on the following systems: **Movable Type, OpenCms**.
- All projects were contacted with requests for this data; those projects that responded are noted above with *Source: spokesperson*.
- **Drupal** numbers are likely under-reported as a number of developers download from Git, which is not included in the total above. The **Drupal** spokesperson describes the Git downloads as “significant.”
- According to the spokesperson for **eZPublish**, recent changes in their tracking systems make an accurate measurement impossible this year. They state, however, that they believe the numbers are steady since 2010, accordingly, we have reported the 2010 number, above.
- **Joomla!** figures are for the English language release only. Second language distributions are not included in the total, leading to a under-reporting of the **Joomla!** numbers.
- **Tiki Wiki** numbers represent the most recent release. They system, however, also offers a Long Term Support release, whose figures are not included. Note also that, that request of **Tiki**, we have revised the 2010 **Tiki** numbers for calculating the trend.
- **TYPO3** also maintains a long terms support release, whose numbers may not be accurately represented in the above totals.
- The **WordPress** figures, though sourced from their online counter, were also corroborated by a spokesperson from Automattic.
- Note that Trend data is missing for **Plone** and **Textpattern** as we did not have download data for 2010.

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 a variety of external installers.

In an attempt to gain evidence of the number of actual live installations on the web, we turned to additional indicators:

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

The information gathered from the survey is our most direct indicator of market share, however, it may not be the most representative. Some projects made significant efforts to publicize the survey to their communities⁸, and therefore have had an impact on the survey. 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. Their responses are shown in Exhibit 2, on the next page. To provide context, we show the figures for 2010 in addition to the results from this year's survey. The percentages shown in the chart indicate the percentage of survey respondents who reported using each of the systems.

⁸ In particular, **DotNetNuke**, **Tiki** and **Liferay**.

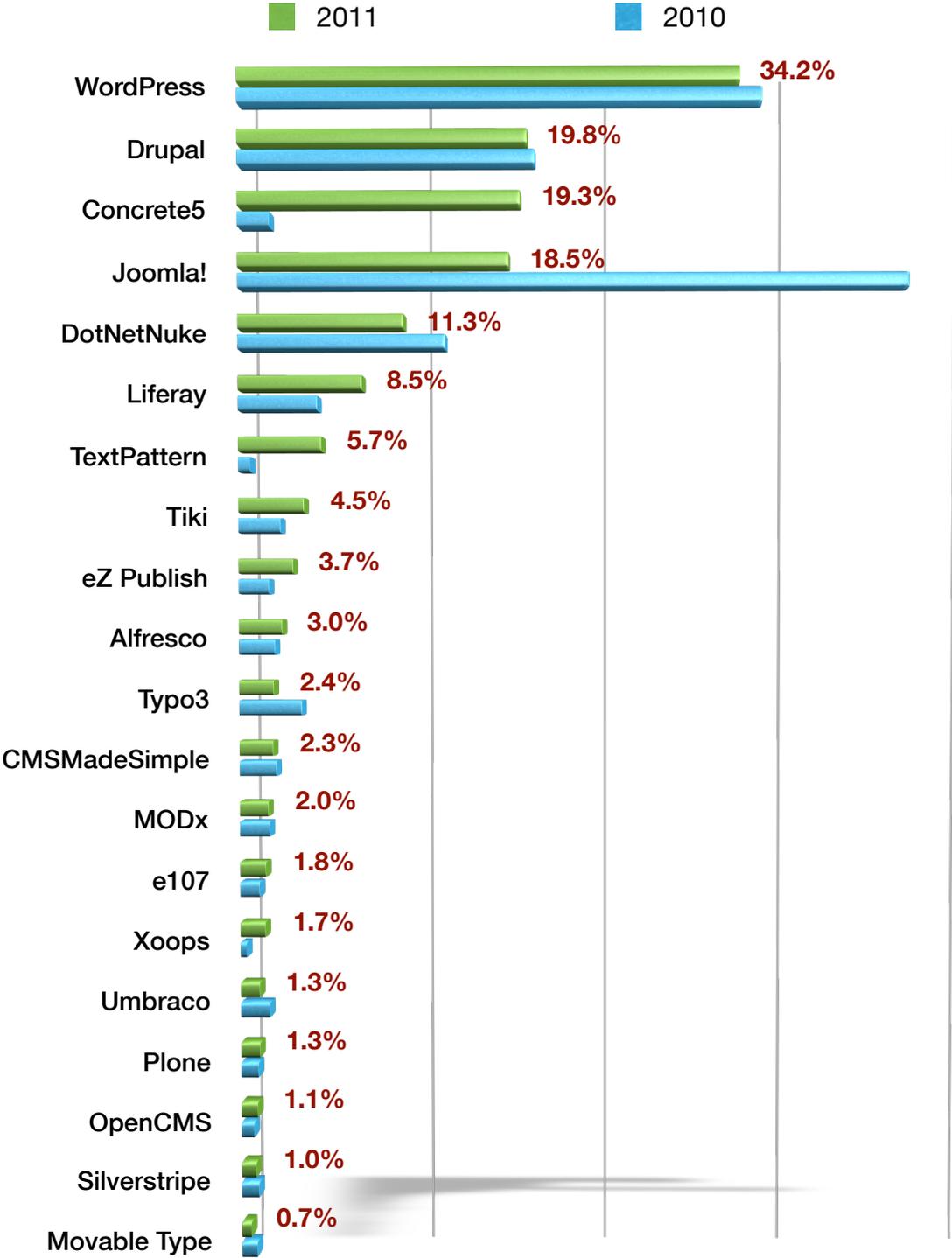


Exhibit 2: Notes on Interpretation

- Percentages may add up to more than 100% as some respondents reported using more than one system.
- We have concerns about the representativeness of this data set. [Compare e.g.](#), the data in the next two charts.
- **Concrete5** is clearly the big winner this year, with a dramatic increase in share.
- Significant growth is also shown by **Liferay**.
- The dramatic drop in **Joomla!** is likely largely due to the fact that the **Joomla!** community aggressively promoted the survey within the community last year. This year, the promotion efforts were not coordinated and less influential.
- Despite very aggressive promotion, **DotNetNuke** actually dropped significantly this year.

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.

W3Techs⁹ analyzes the top one million websites in Alexa's rankings in terms of the technologies used on those sites. Included in their analysis is a look at content management systems. The W3Techs data set covers a number of the systems in our survey and has the added advantage of objectivity and a large sample set. Exhibit 3 shows their assessment of cms market share in the Alexa One Million¹⁰.

Exhibit 3 - The Alexa One Million

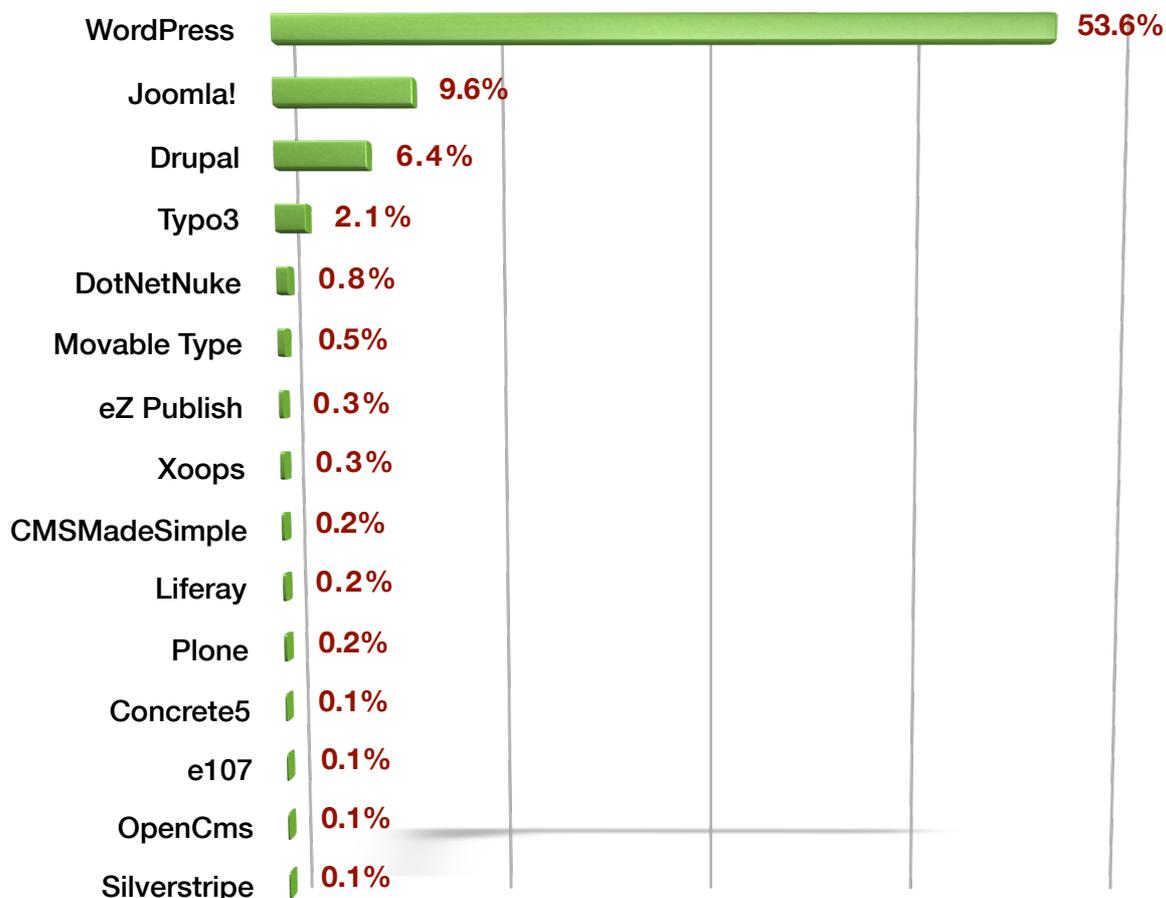


Exhibit 3: Notes on Interpretation

- The **W3Techs** data set does not include occurrences of **Alfresco**.
- **MODx**, **Textpattern**, **Tiki** and **Umbraco** were listed as having “less than 0.1% market share.”

⁹ <http://w3techs.com>

¹⁰ For their purposes, W3Techs calculates market share relative to the number of sites using any of the systems they measure. They note that among their sample group, “71.5% of the websites use none of the content management systems that we monitor.” See, http://w3techs.com/technologies/overview/content_management/all

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** uses a much larger sample set¹¹. Exhibit 4 shows **BuiltWith**'s assessment of market share.

Exhibit 4 - Live installations, as per BuiltWith

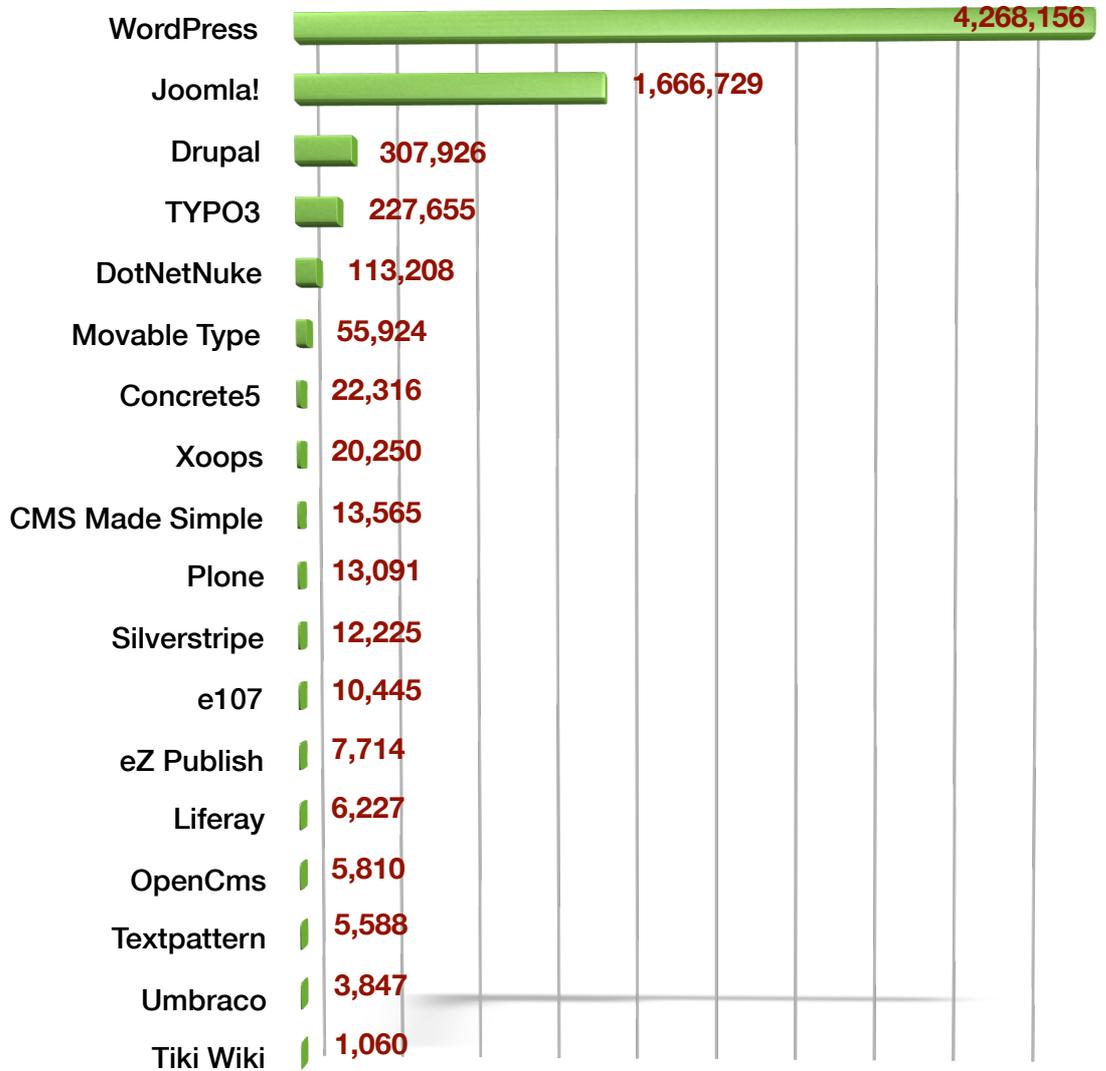


Exhibit 4: Notes on Interpretation

- The numbers represent the number of sites in the **BuiltWith** selection set that use each system.
- The results did not show occurrences of **Alfresco** or **MODx**.

¹¹ According to BuiltWith, the sample group is comprised of the Quantcast One Million, the Alexa One Million, the Google Top 1,000, The Internet Retailer 500, the Fortune 2,000 and approximately 130 million other sites.

Third Party Support

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

For this metric, we 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?

Eance¹² and Guru¹³ provide similar online directories designed to help buyers locate professional service providers.

Eance is focused on web, programming, writing and related professions. More than 538,000 providers are registered on the site, of which more than 129,000 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, along with the trend since the 2010 report.

¹² See, <http://www.elance.com>

¹³ See, <http://www.guru.com>

	Elance	Trend	Guru	Trend
WordPress	19,215	18%	4,536	21%
Joomla!	15,253	19%	4,650	24%
Drupal	8,258	27%	2,784	36%
DotNetNuke	863	9%	396	16%
TYPO3	326	37%	326	24%
MODx	271	37%	90	30%
Liferay	179	29%	66	12%
Plone	140	27%	88	5%
Alfresco	135	38%	42	2%
Umbraco	123	52%	20	25%
Movable Type	116	68%	33	-25%
Xoops	107	23%	64	3%
Concrete5	88	110%	18	50%
SilverStripe	83	- 5%	29	38%
eZ Publish	48	92%	19	111%
e107	37	6%	18	- 5%
Textpattern	34	6%	57	138%
OpenCms	23	- 38%	12	20%
Tiki	19	171%	13	0%
CMSSMadeSimple	10	- 9%	10	43%

Exhibit 5: Notes on Interpretation

- Trend column shows % increase over figures shown in the 2010 Report.
- Average growth on Elance: 35.85%
- Average growth on Guru: 28.4%
- Trending: **Concrete5**, **eZ Publish** and **MODx** exceeded average growth rates on both Elance & Guru.
- Trending: **DotNetNuke** and **e107** were significantly below the average on both Elance & Guru.

Books in Print

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

To gain further insight into the extent 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 that have been announced, but not yet released. The search was restricted to English language books only. A visit to Amazon¹⁴ produced the information contained in Exhibit 6.

Exhibit 6 - Books in Print

	Total in Print	Released in 2011	Announced
WordPress	83	23	4
Drupal	64	22	7
Joomla!	65	13	1
Tiki	7	6	0
Plone	14	3	0
Alfresco	9	3	0
Concrete5	2	2	0
DotNetNuke	15	1	0
Liferay	11	1	1
Movable Type	5	1	0
Xoops	4	1	0
eZ Publish	4	1	0
CMSMade Simple	2	1	0
e107	2	1	0
MODx	2	1	0
SilverStripe	1	1	0
Umbraco	1	1	0
TYPO3	8	0	0
OpenCms	3	0	0
Textpattern	2	0	0

¹⁴ See, <http://www.amazon.com>

Exhibit 6: Notes on Interpretation

- The data in Exhibit 6 is sorted according to publishing activity in the last year (the middle column).
- 3 of our systems showed no publishing activity in 2011; a significant improvement over the same period last year, where 9 systems had no publishing activity in the prior 12 months.
- **Tiki** shows the most dramatic improvement in this metric. Last year's survey found no titles in print for **Tiki**. This year, **Tiki** lags behind only the Big Three in terms of publishing activity in the last 12 months and is in the Top 10 in total number of titles in print.
- Trending: **OpenCms** and **TextPattern**. **OpenCms** exhibits a decline in publishing activity over the previous year. Even more worrying is **TextPattern**, which shows no new titles published since 2007.
- We also find cause to wonder if **Joomla!** publishing activity has peaked. Consider the trend: Titles published in 2009 = 22. Titles in 2010 = 19. Titles in 2011 = 13. Add to that the fact that only 1 title has been announced for 2012 and we seem to have a clear pattern of declining interest on the part of commercial publishers. Note that this pattern does not exist for either **WordPress** or **Drupal**.



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Measuring Brand Strength

In this section we turn to assessing the intangible -- brand strength. To support this analysis, we captured a broad sampling of data from the survey, from search engines, from social media and from various third parties. We then 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 examined the following statistics:

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

Search Engine Ranking

How do the project sites rank?

In an effort to discern the search engine visibility of each of the systems in the sample group, we queried Google, Yahoo! and Bing with a set of likely keyword combination. We measured which of our project systems made it into the first two pages of results (top 20 results), and to what extent their visibility had improved or decreased over the past 12 months. The results are summarized in Exhibit 7, on the next page.

The keywords chosen were:

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

- cms
- web cms
- web content management system

Exhibit 7 - Search Engine Visibility

	Pages in the Top 5	Pages in the Top 10	Pages in the Top 20	Change since 2010 Report
Drupal	6	6	8	+3
Joomla!	5	6	7	-1
Alfresco	2	7	9	-10
Concrete5	1	9	10	+11
DotNetNuke	1	4	7	+6
Plone	1	3	5	+1
SilverStripe	0	1	4	+3
OpenCms	0	0	4	-1
CMSMadeSimple	0	0	1	-4
MODx	0	0	1	-3

Exhibit 7: Notes on Interpretation

- The table displays the number of pages that appear for the primary project sites. (The one exception to the “primary project site” rule is **Silverstripe**. The rankings shown above are for Silverstripe.com, not Silverstripe.org; while the latter is the primary project site, anyone searching for any of the terms we sampled will find a Silverstripe site that links directly to the CMS, therefore the .com domain is relevant.)
- The numbers in the first three columns of numerical data indicate the number of pages in each grouping.
- The data in the right column is the net gain or loss in position within the Top 20 results, *i.e.*, the trend score of **+11** for **Concrete5** indicates that over the last year the **Concrete5** site has moved up a total of 11 places within the Top 20 results. The trend compares 6 November 2011 to 6 November 2010.
- Trending: The big winners here are **Concrete5** and **DotNetNuke**, which both show considerable improvement over last year.
- **eZ Publish** appeared briefly in the Top 20 during the measurement period, but had dropped out again by the time the data was finalized.
- **e107**, **Liferay**, **Movable Type**, **Textpattern**, **Tiki**, **TYPO3**, **Umbraco**, **WordPress** and **Xoops** showed no ranking in the Top 20 for any of the terms in during the 12 month period.
- For the third year running, the **WordPress** project site fails to appear in the Top 20 results for any of the keyphrases.

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

Google PageRank

How does Google rate the project sites?

PageRank is an analysis and ranking algorithm created by Larry Page and used in part by Google to assess 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 Google¹⁵.

We looked at the PageRank of the primary project sites in the survey in an attempt to gain some insight into Google's perception of the relative importance¹⁶ of each of those sites.

Exhibit 8: Notes on Interpretation

- Trending: **Liferay** improved from 7 to 8.
- Trending: **Umbraco** improved from 6 to 7.
- Trending: **Alfresco** dropped from 7 to 6.

¹⁵ 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>

¹⁶ 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 systems, we looked at the traffic to each of the primary project websites. Traffic statistics were derived from the ranking services provided by Alexa¹⁷. The Alexa ranking of a site provides a measurement of a website's popularity, relative to other websites. While the Alexa metric is not 100% accurate, it does provide a convenient tool with a standardized approach for comparing site popularity.

Exhibit 9 - Alexa Rank

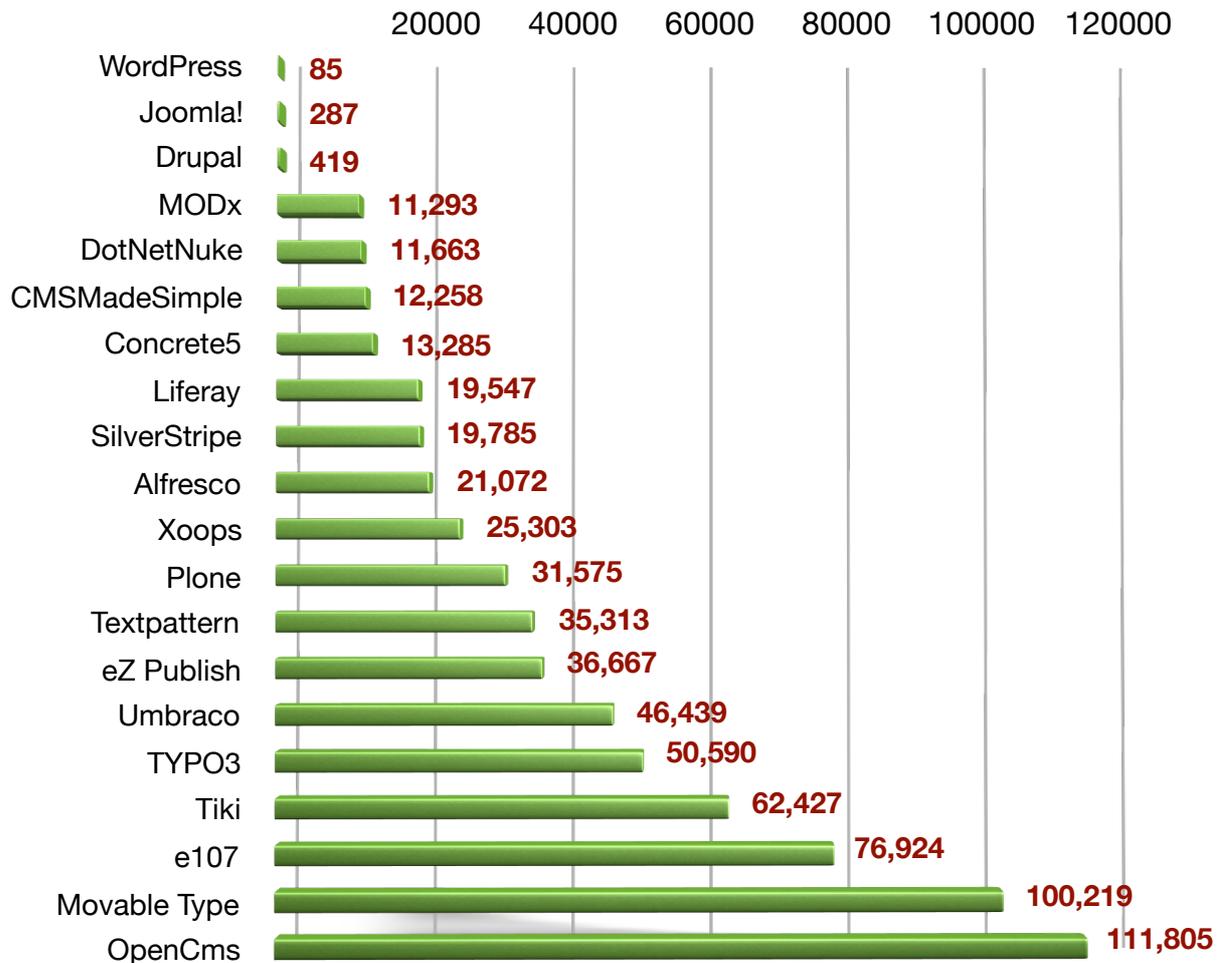


Exhibit 9: Notes on Interpretation

- The lower the value, the higher the ranking.
- Trending: Since the 2010 Report, the gap between the Top 3 and the rest of the pack increased by over 60%
- Trending: Since 2009, there is no change in ordering for top five systems.
- Trending: Largest increases in site ranking were for **WordPress** (+29%), **Concrete5** (+20%), **Drupal** (+16%) and **Alfresco** (+13%).
- Trending: Largest decreases in site ranking were for **Umbraco** (-151%), **TYPO3** (-132%), **e107** (-116%), and **Movable Type** (-83%).

¹⁷ 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? In an attempt to answer these questions, we look 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 CMS brands. 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.

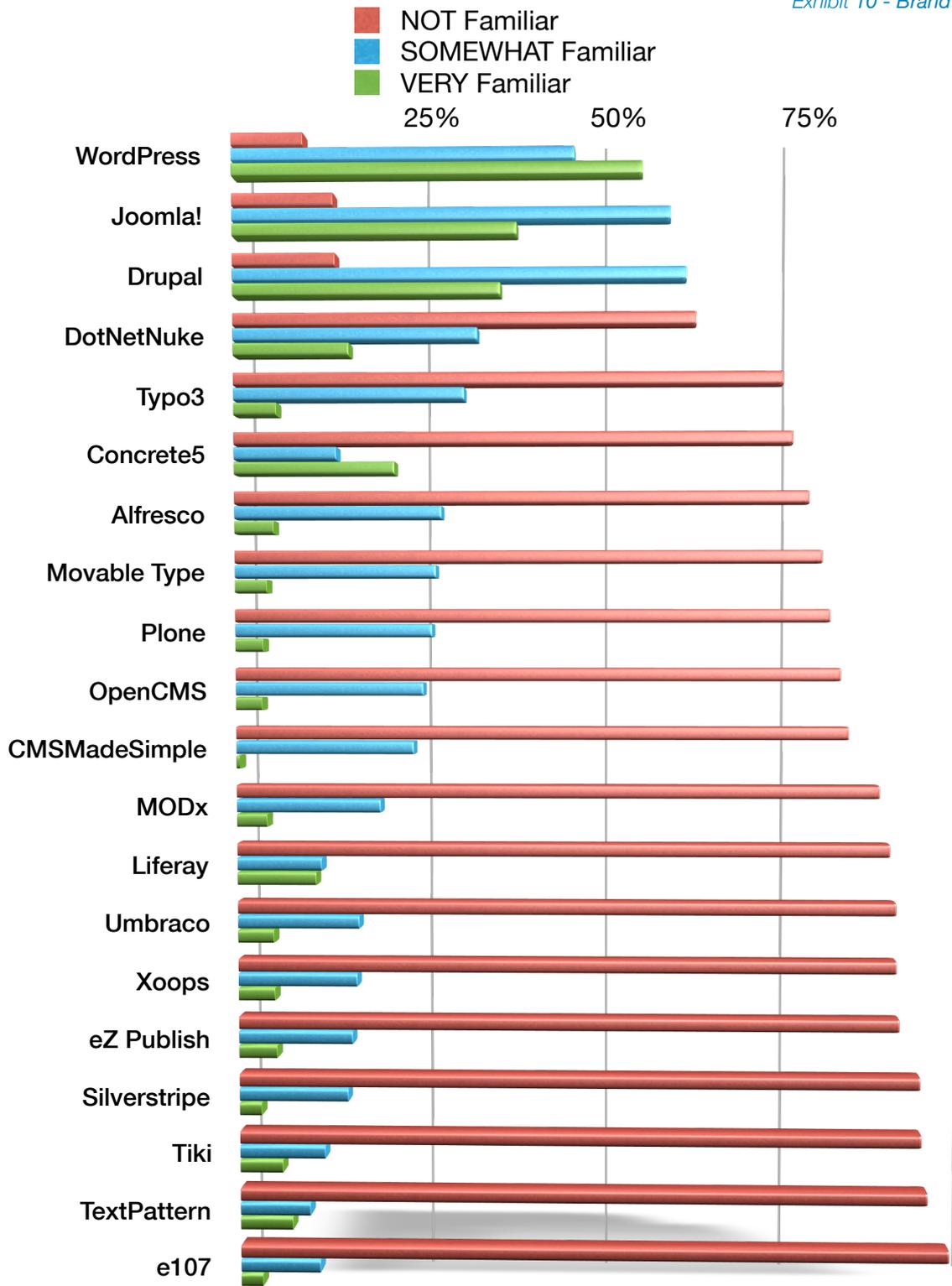


Exhibit 10: Notes on Interpretation

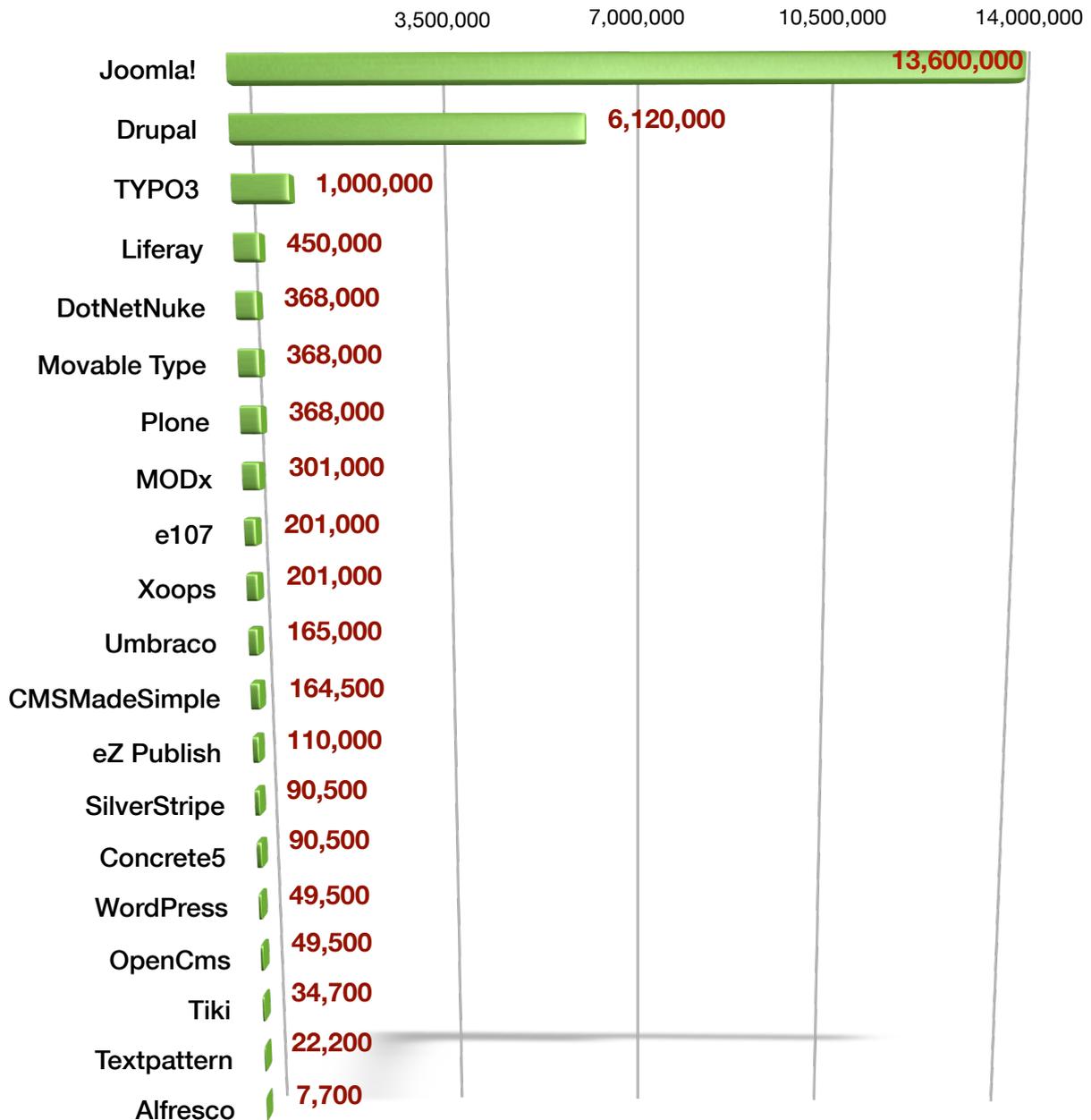
- Only the Big Three show familiarity by more than 50% of the survey respondents; this is the same result seen last year.
- The gap between the Big Three and the fourth rated brand is huge, with 56.2% of respondents saying they are not familiar with the system ranked fourth, **DotNetNuke**. (Only a slight improvement from last year, when 57.2% indicated they were Not Familiar with **DotNetNuke**)
- Trending: **Concrete5**, which moved UP from #20 last year to #6 this year.
- Trending: **Tiki**, which moved DOWN from #10 last year to #18 this year.

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 ¹⁸, we looked to average monthly query volume on Google. See our Notes on Interpretation on the following page.

Exhibit 11 - Google Query Volume



¹⁸ According to the most recent comScore metrics, Google holds 66.2% market share for the U.S. search market. [see, http://www.comscore.com/Press_Events/Press_Releases/2011/11/comScore_Releases_October_2011_U.S._Search_Engine_Rankings](http://www.comscore.com/Press_Events/Press_Releases/2011/11/comScore_Releases_October_2011_U.S._Search_Engine_Rankings)

Exhibit 11: Notes on Interpretation

- The chart display the average monthly global query volume in all languages.
- Limitations: (1) **WordPress** and **Alfresco** are likely under-represented here due to the issues outlined the Methodology section of this paper. (2) **MODx** and **Movable Type** are likely over-represented here due to the issues outlined the Methodology section of this paper.
- Trending: **CMSSMadeSimple** volume is up 232% over the 2010 Report, the system's second year of triple digit growth.
- Trending: Significant increases in query volume for **CMSSMadeSimple** (+232%), **Plone** (123%), **Concrete5** (83%) and **DotNetNuke** (83%).
- Trending: **OpenCMS**, **Textpattern**, **Tiki** and **Xoops** all showed double digit decreases for the second year in a row; the only systems that posted consecutive year-on-year declines.

Share of Voice

What brands are people talking about this year?

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 aggregate total bookmarking activity for the project sites on Delicious¹⁹, Digg²⁰ and Reddit²¹. The results are shown in Exhibit 12, below.

Exhibit 12 - Share of Voice: Social Bookmarking

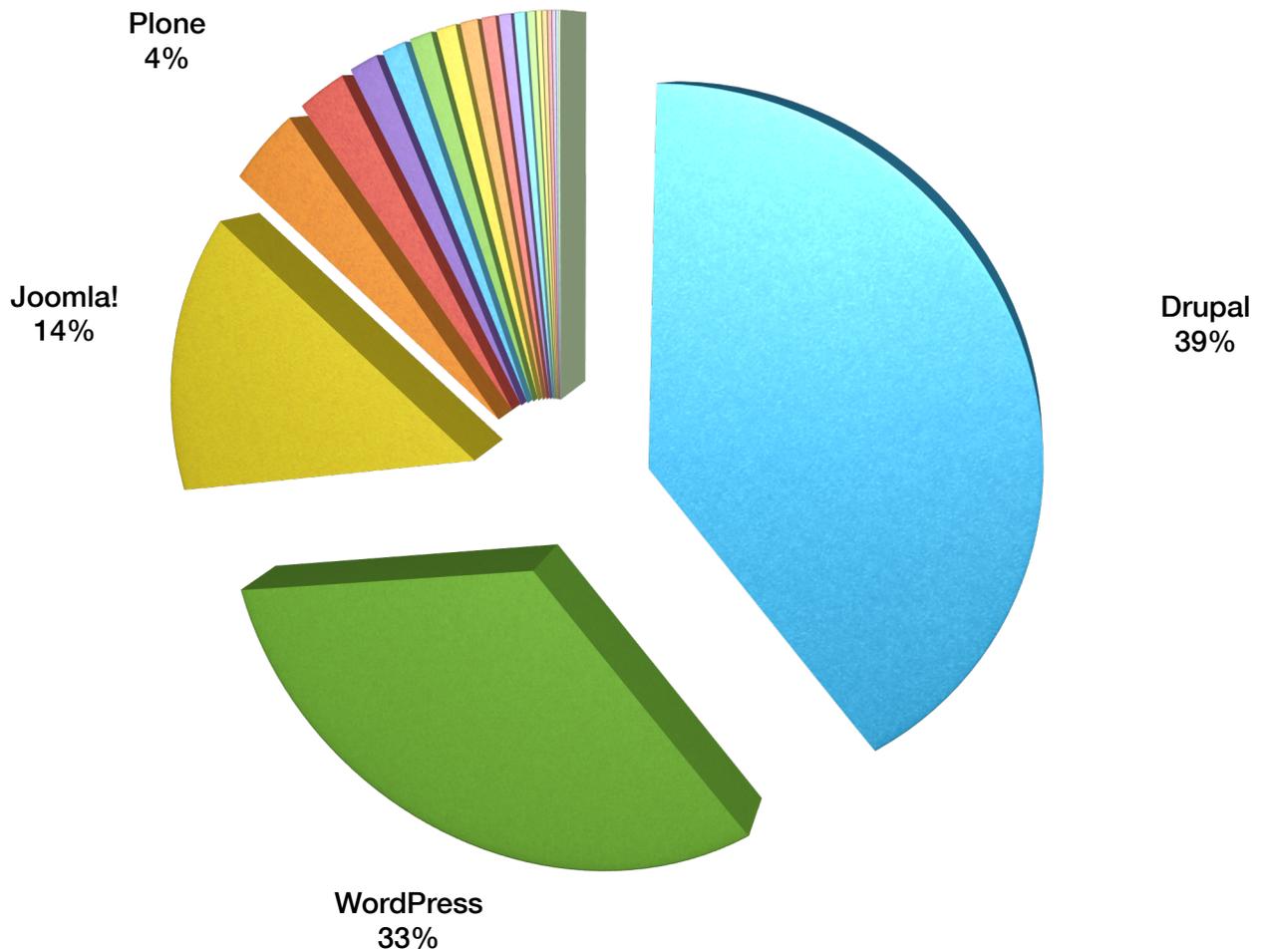


Exhibit 12: Notes on Interpretation

- The Big Three dominate this metric, with **Drupal** and **WordPress** enjoying a considerable lead over **Joomla!**.
- Systems not shown had less than 4% share of voice.
- Laggards: **e107**, **Liferay**

¹⁹ See, <http://www.delicious.com/>

²⁰ See, <http://www.digg.com>

²¹ See, <http://www.reddit.com>

Blogs

The chart below shows the share of voice of each of the brands in the blogosphere in 2011.

Exhibit 13 - Share of Voice: Blogs

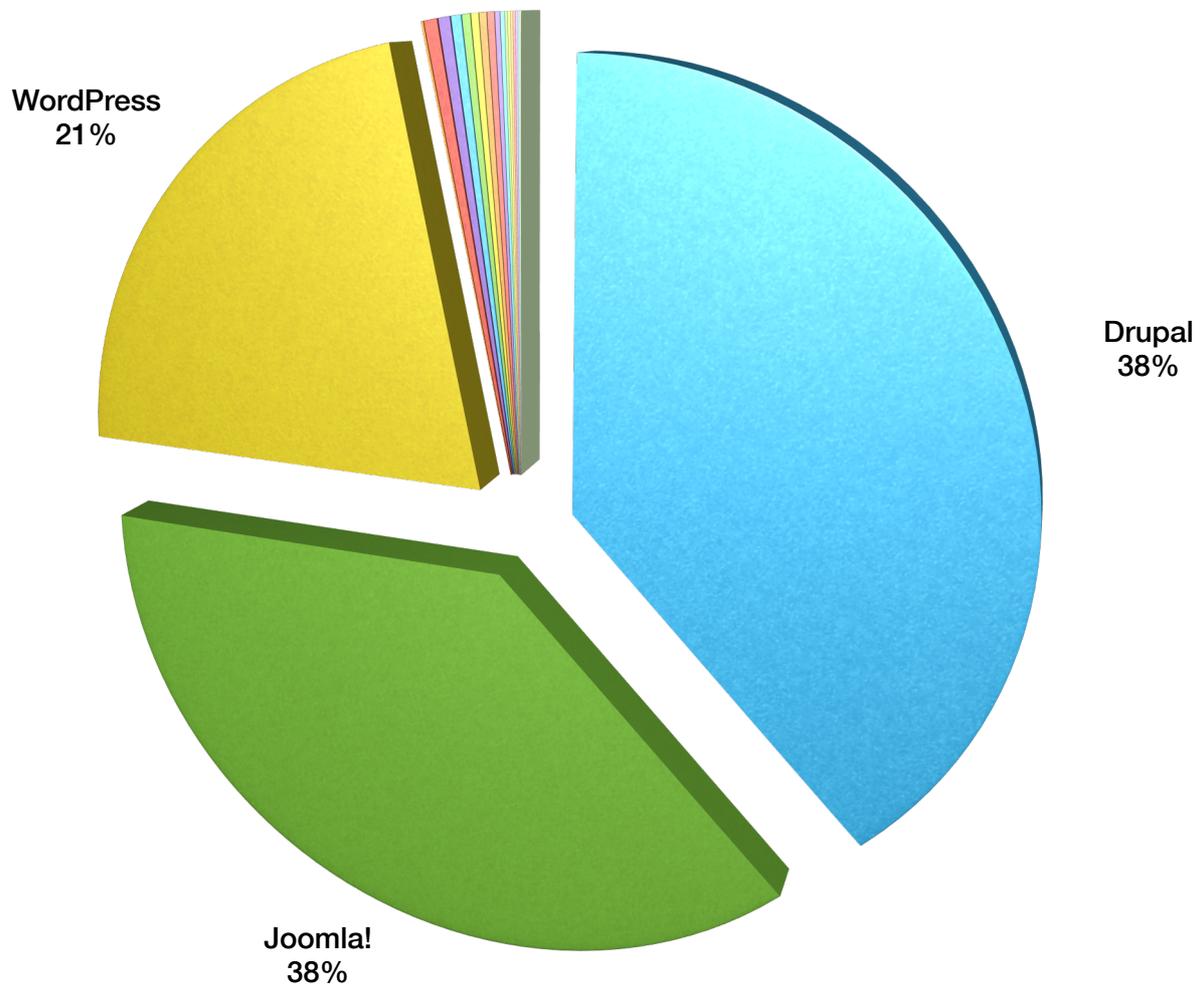


Exhibit 13: Notes on Interpretation

- Data is from Google Blog Search, worldwide, in English only, for the 12 months period ending 1 November 2011. Blogs originating from wordpress.com were excluded from the search results to avoid distortion from the WordPress hosted blogging service.
- The Big Three dominated this metric again in 2011, with **Drupal** & **Joomla!** essentially tied. In a reverse of last year's numbers, **Drupal** enjoyed a slight lead in raw numbers.
- Systems not listed in the chart above had less than 2% share of voice.
- Laggards: **Alfresco**, **CMSMadeSimple**

Twitter

In 2011, Twitter retained its dominance of the micro-blogging category. We employed Google search to provide us with insight into the prominence of each the various open source CMS brands on Twitter in 2011. The results are shown in Exhibit 14, below.

Exhibit 14 - Share of Voice: Twitter

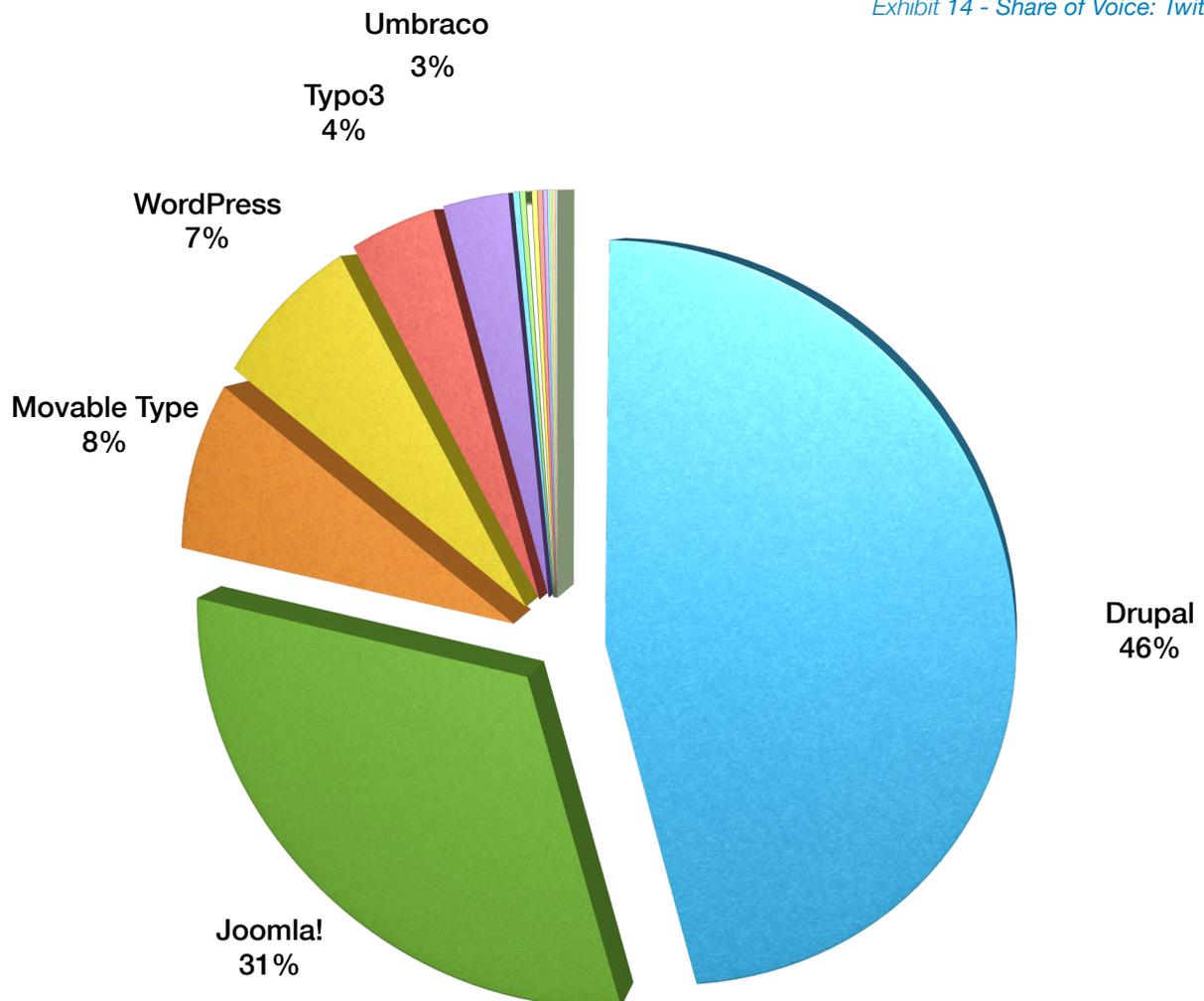


Exhibit 14: Notes on Interpretation

- Data is from a domain-specific search on Google, worldwide, for the 12 months period ending on 1 November 2011.
- **Drupal & Joomla!** completely dominate this metric, accounting for 77% of mentions during the preceding 12 months.
- Laggards: **CMSMadeSimple, e107**

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

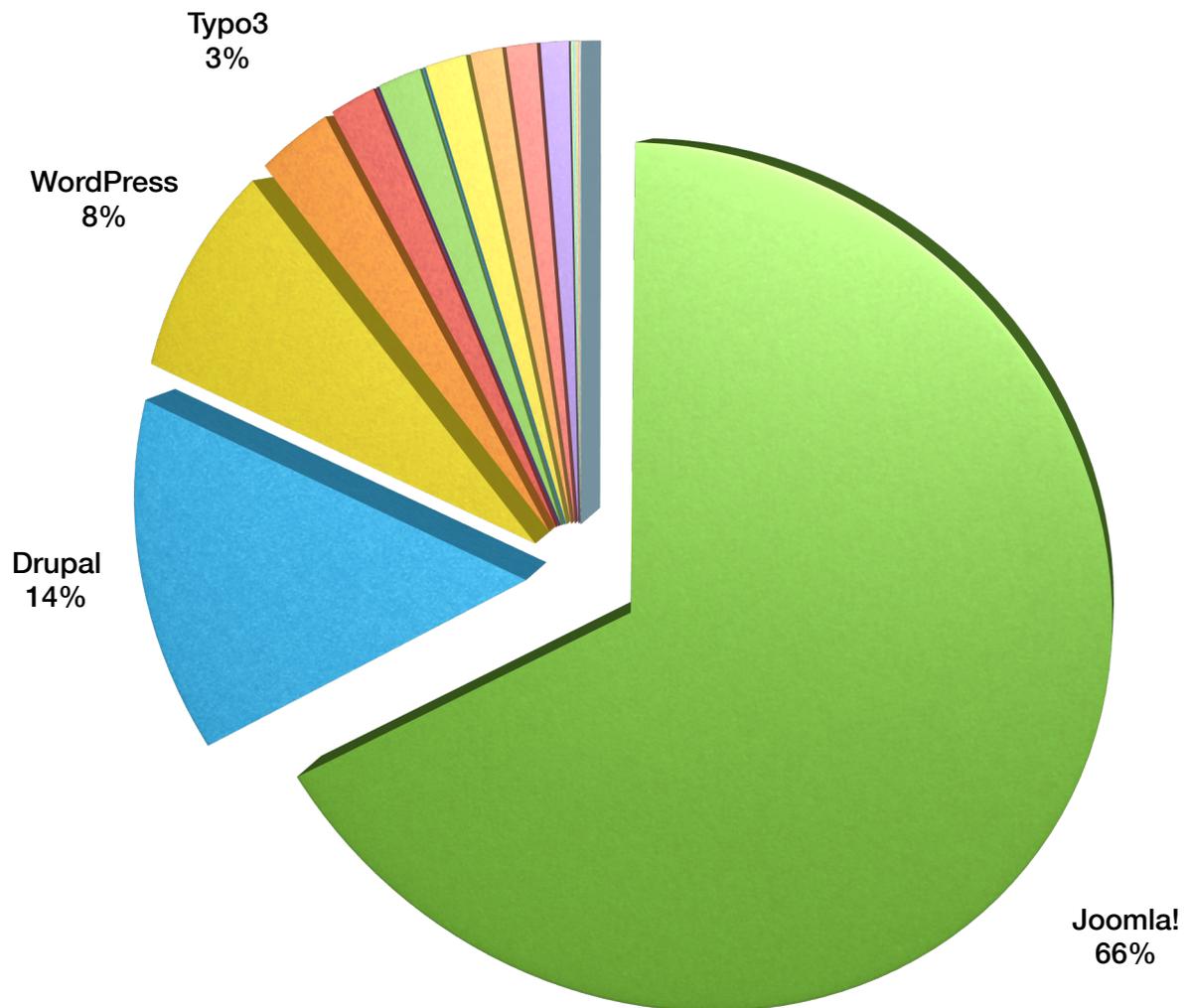


Exhibit 15: Notes on Interpretation

- Data is from a domain-specific search on Google, worldwide, in English only, for the 12 months period ending on 1 November 2011.
- **Joomla!** dominated the discussion on Facebook by a margin of better than 5:1. **Drupal** is a distant second.
- The Big Three account for 89% of the share of voice.
- Laggards: **Alfresco**, **Tiki**

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

We queried the survey respondents about their feelings toward each of the brands in our sample set. The results are shown, below. See our Notes on Interpretation on the following page.

Exhibit 16 - Brand Sentiment

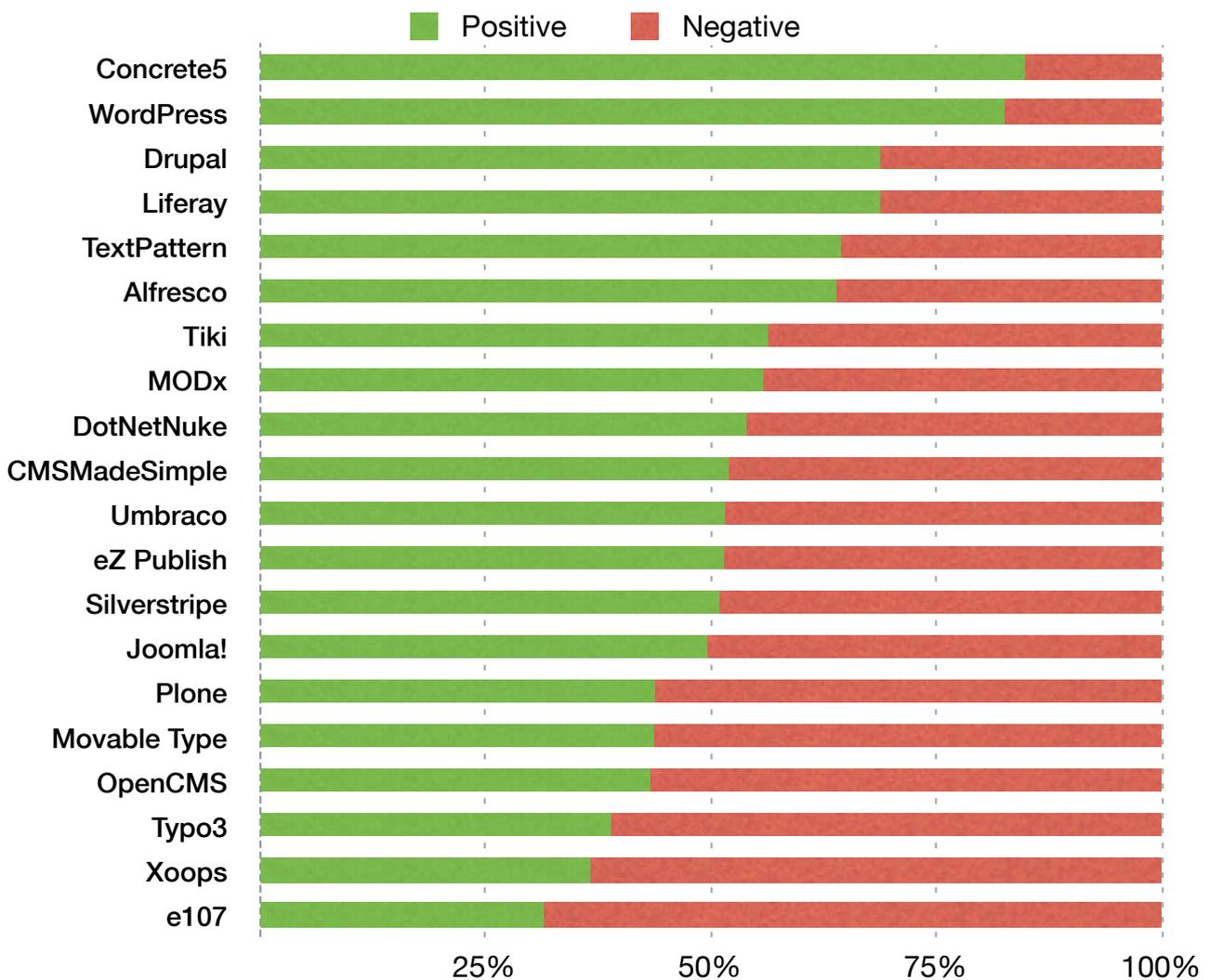


Exhibit 16: Notes on Interpretation

- 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.
- Trending: **Concrete 5** moved up from #12 last year, to #1 this year.
- Trending: **Joomla!** moved down from #3 last year to #14 this year.

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.

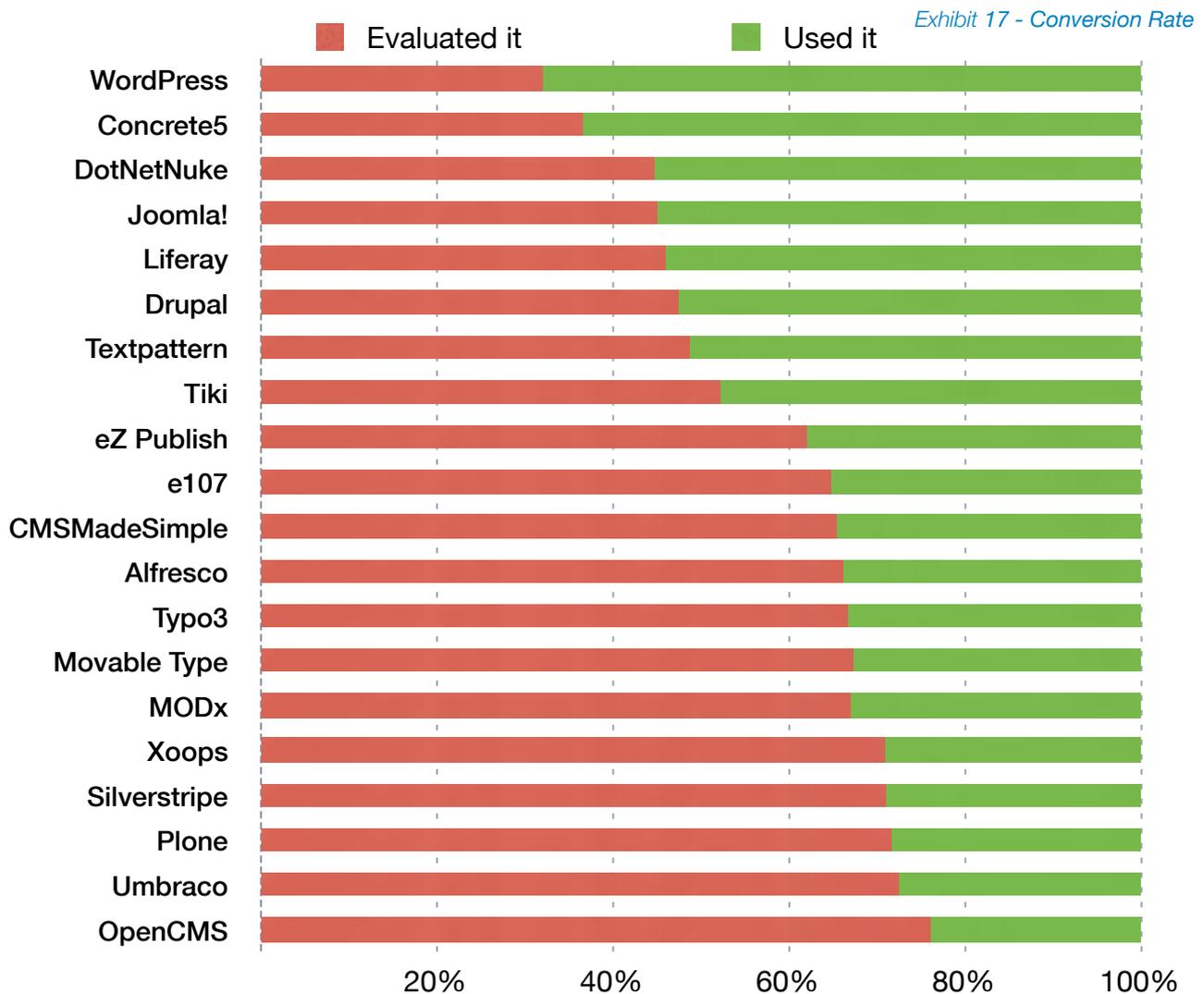


Exhibit 17: Notes on Interpretation

- Note the number of respondents vary. The data has been normalized to express a ratio.
- **WordPress** and **Concrete5** enjoy a comfortable lead in this category.
- Trending: **Joomla!** saw a significant deterioration in position this year compared to last.

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

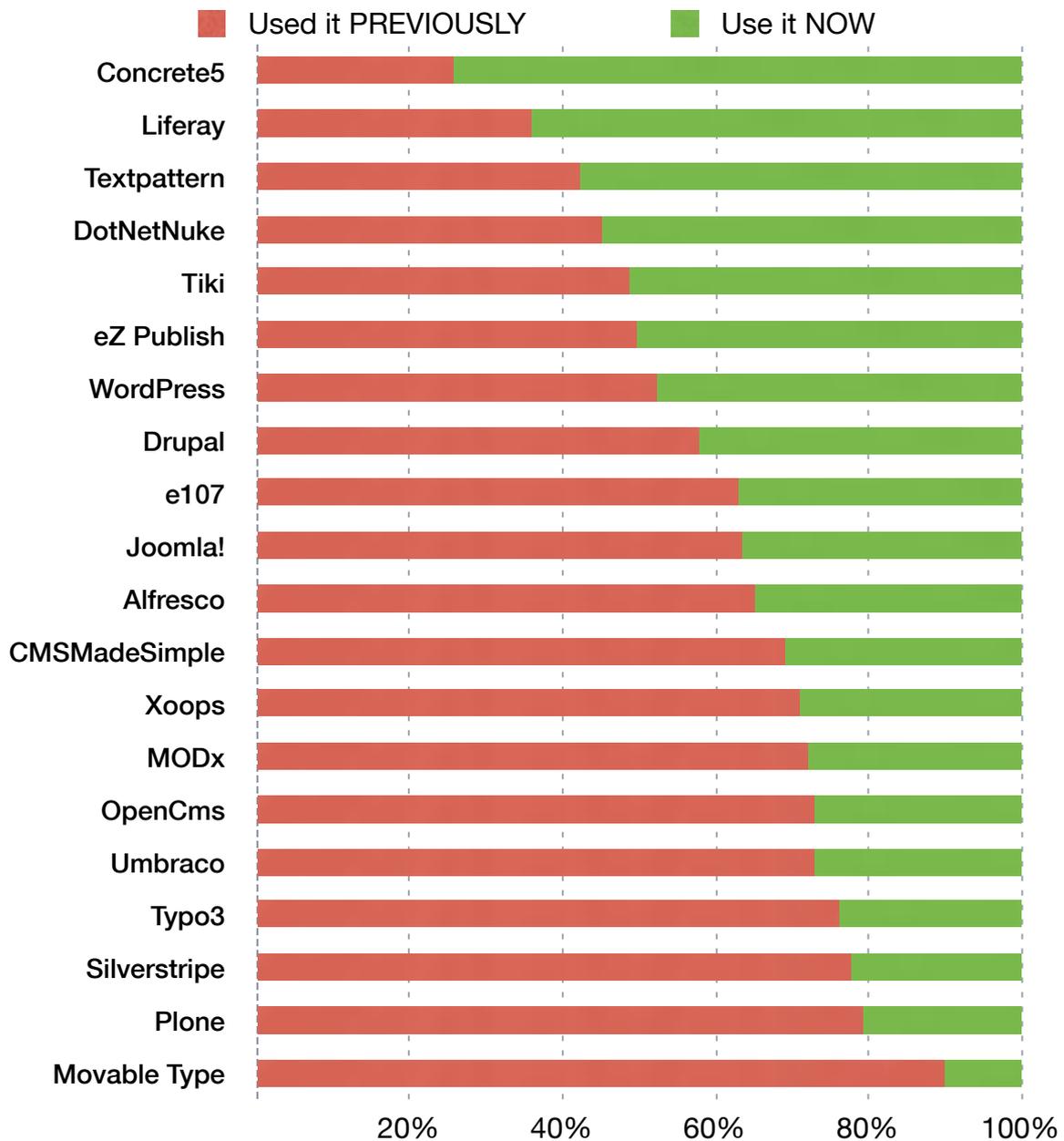


Exhibit 18: Notes on Interpretation

- Note the number of respondents vary. The data has been normalized to express a ratio.
- Trending: **Concrete5** moved up from #6 last year, to #1 this year, with Abandonment dropping by half.
- Trending: **Tiki** moved up from #11 last year to #5 this year.
- Trending: **Joomla!** moved down from #1 in 2010, to #10 in 2011, with the reported Abandonment rate doubling.
- Trending: **Umbraco** moved down from #7 last year, to #16 this year.
- Trending: **TYPO3** moved down from #8 last year, to #17 this year.

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

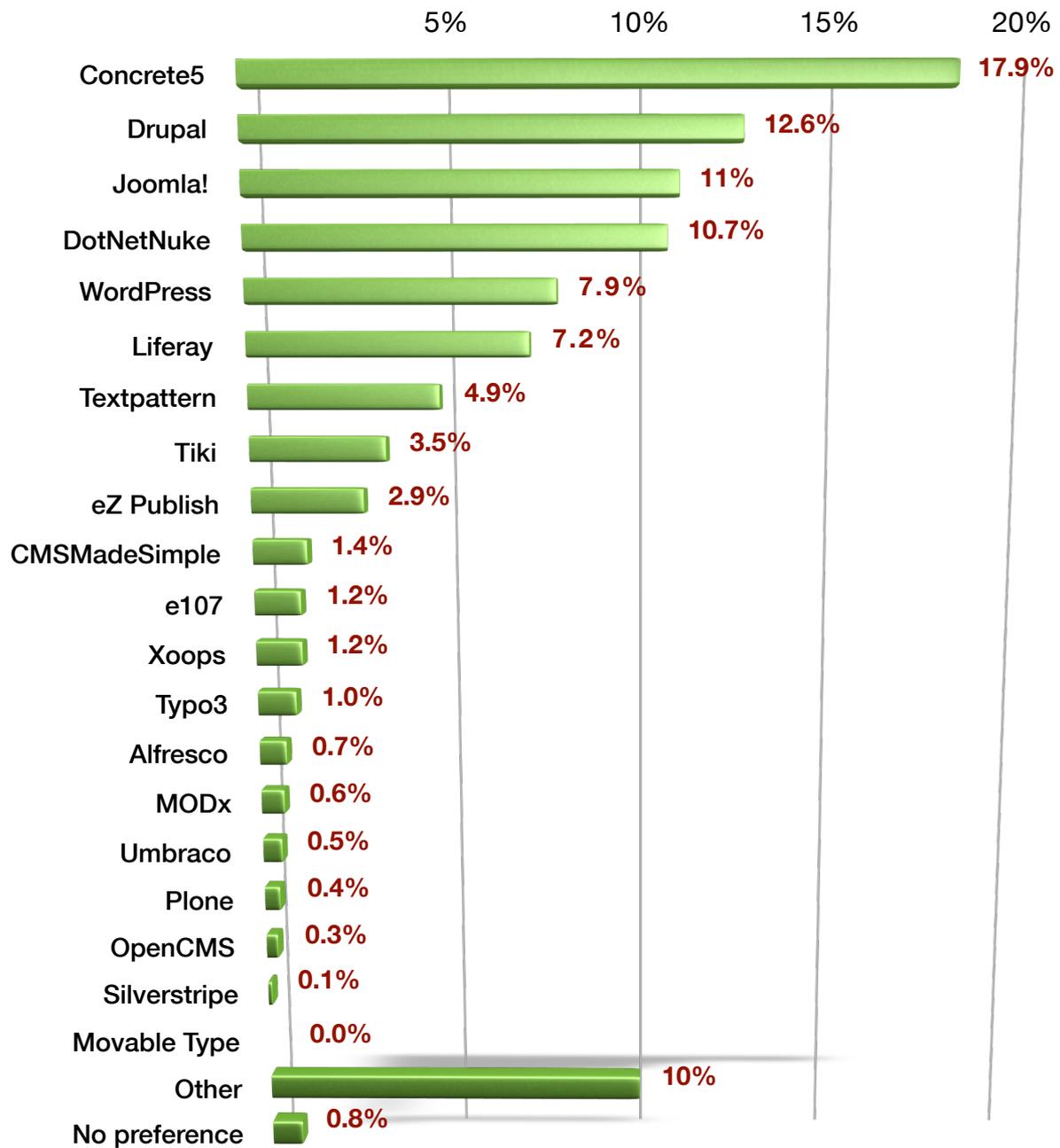


Exhibit 19: Notes on Interpretation

- None of the respondents indicated a preference for **Movable Type**.
- Trending: **Concrete5** moved up from #9 last year, to #1 this year.
- Trending: **Textpattern** moved up from #18 last year to #7 this year.
- Trending: **Joomla!** was ranked as #1 last year and enjoyed a significant lead - by a margin of 3 to 1 - over the #2 system; this year **Joomla!** has dropped to #3.
- The number of people indicating a preference for OTHER increased significantly this year.

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

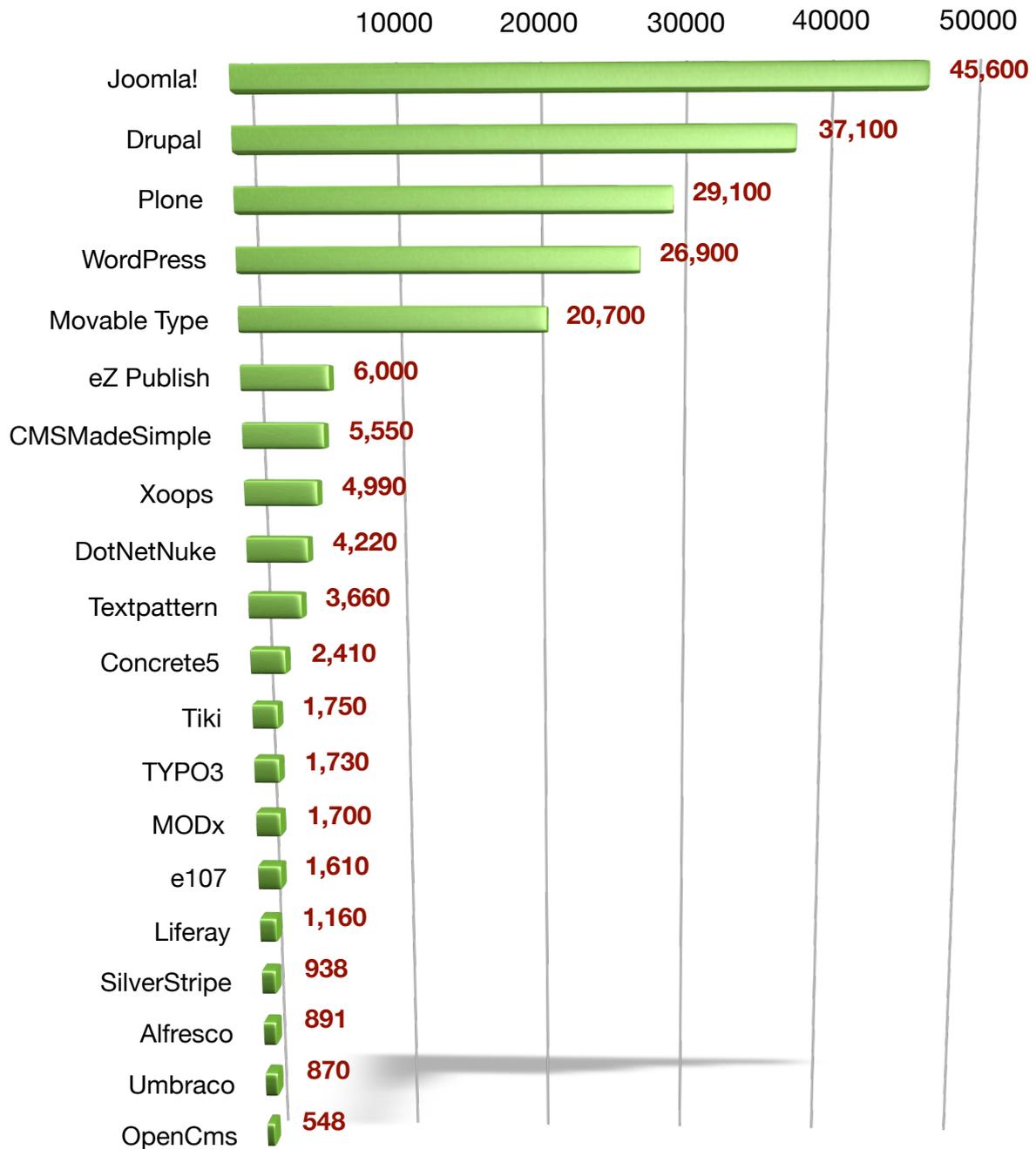
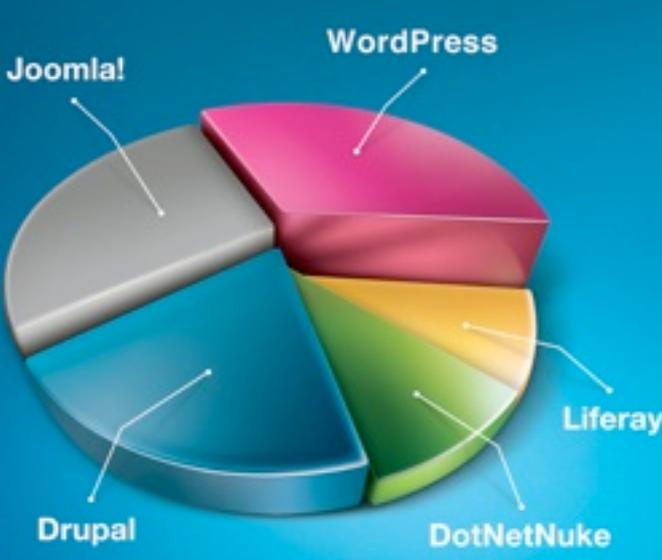


Exhibit 20: Notes on Interpretation

- Trending: Significant growth this year for **Silverstripe** (+296%), **Tiki** (+266%), and **Liferay** (+234%).
- Trending: **TYPO3** was the only system to show a decreasing inbound link count (-25%).

4 CONCLUSIONS



What's the right choice?

The answer: It depends

No one has more insights into the open source CMS market. Contact us to find the right fit for your business requirements.

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contactus@waterandstone.com



water & stone
a full service digital agency

Conclusions

The final section of this Report is concerned with synthesizing the data from the previous sections and putting it into context with the market's historical trends. The discussion is divided into two parts:

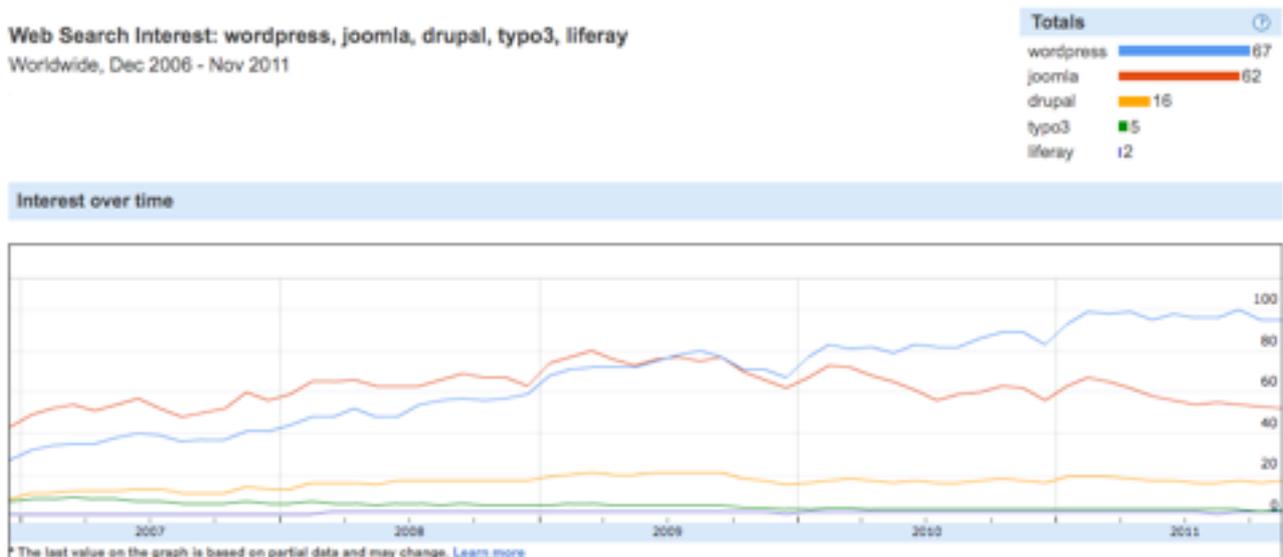
- **The Market Leaders**
- **Systems to Watch**

The Market Leaders

For the fourth year in a row, **WordPress**, **Joomla!** and **Drupal** dominate the market share and brand strength ratings in the open source CMS market. The Big 3 lead a majority of the metrics we reviewed.

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 systems²² over the last 24 months. Note that the weakest of the Big Three -- **Drupal** -- still enjoys a 3:1 lead over the nearest competitor, **TYPO3**, and an 8:1 lead over the fifth ranked system, **Liferay**²³.

Exhibit 21 - 5 year Trend - Top 5 Search Query Levels



²² That is, ranked in terms of query volume on Google.

²³ Note that the slide seen in **Joomla's** rankings is discussed in the next section.

Of the Big 3, WordPress is the clear market leader. As you can see in the chart below, the WordPress brand dominated search query volume on Google over the last 12 months.

Exhibit 22 - 12 month Trend - Big 3 Search Query Levels



Exhibit 22: Notes on Interpretation

- Trending: **WordPress** interest increasing.
- Trending: **Joomla!** interest decreasing (slightly), continuing a consistent downwards trend that began in early 2009 (see, Exhibit 21, above).
- **Drupal** down slightly, but essentially flat year-on-year.

The chart below shows the traffic to the primary project sites of the Big 3 over the last 24 months. wordpress.org clearly outstrips both joomla.org and drupal.org.

Exhibit 23 - Big 3 Daily Traffic



It is our opinion that the Big 3 will remain in firm control of the market in the near to medium term. **WordPress** continues to grow and extend its lead. **Drupal** remains steady. Of the three, only **Joomla!** shows signs of deteriorating market strength²⁴.

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 trend in Installations and in developer support.

Nonetheless, the gap between **DotNetNuke** and **Umbraco** is narrowing in several areas. While **Umbraco** still lags significantly in Downloads and Installations, their numbers are growing²⁵.

Google web search interest provides us with one of the most dramatic visual indicators of the convergence in interest in the two systems. Exhibit 24, below shows search query interest in **DotNetNuke** and in **Umbraco** across the last 12 months.

Exhibit 24 - DNN & Umbraco Search Query Volume



Exhibit 24: Notes on Interpretation

- The chart above shows the most recent 12 months.
- The trend seen has continued steadily across the last last three years.

Exhibits 25 and 26, shown on the next page, show a convergence in daily traffic and pageviews for the primary project sites. The convergence appears to have peaked in the fourth quarter of 2010, and since that time, **Umbraco** has slowly lost share, while **DotNetNuke** has remained steady, with some signs of improving position.

²⁴ See, *Cause for Concern*, supra, for further discussion of **Joomla!**

²⁵ **Umbraco** is discussed further in the section below, *Projects to Watch*.

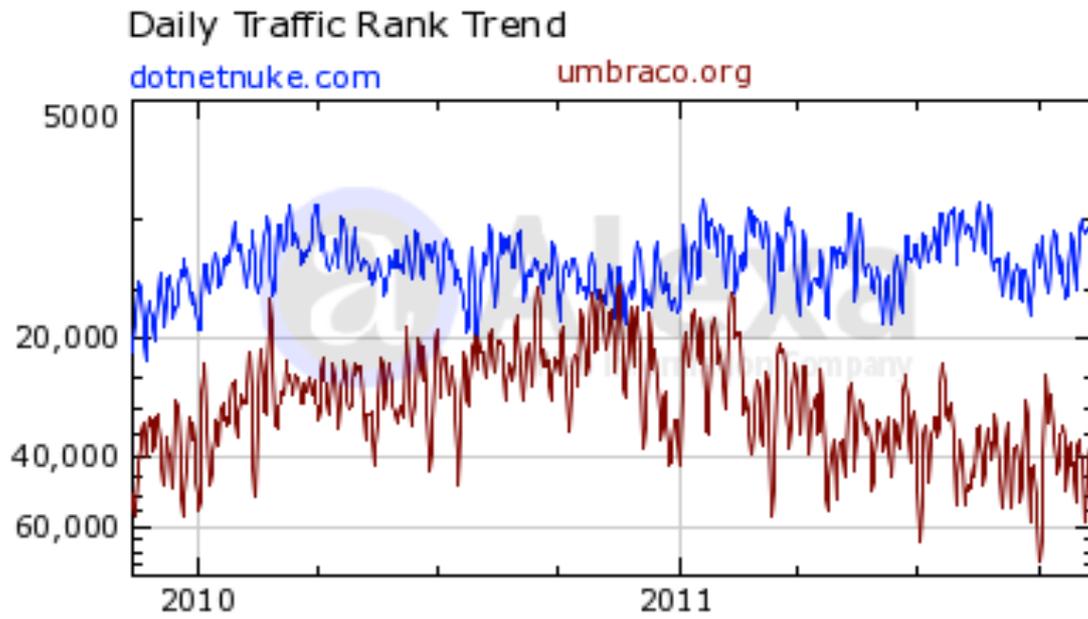


Exhibit 25: Notes on Interpretation

- Source: Alexa.com.

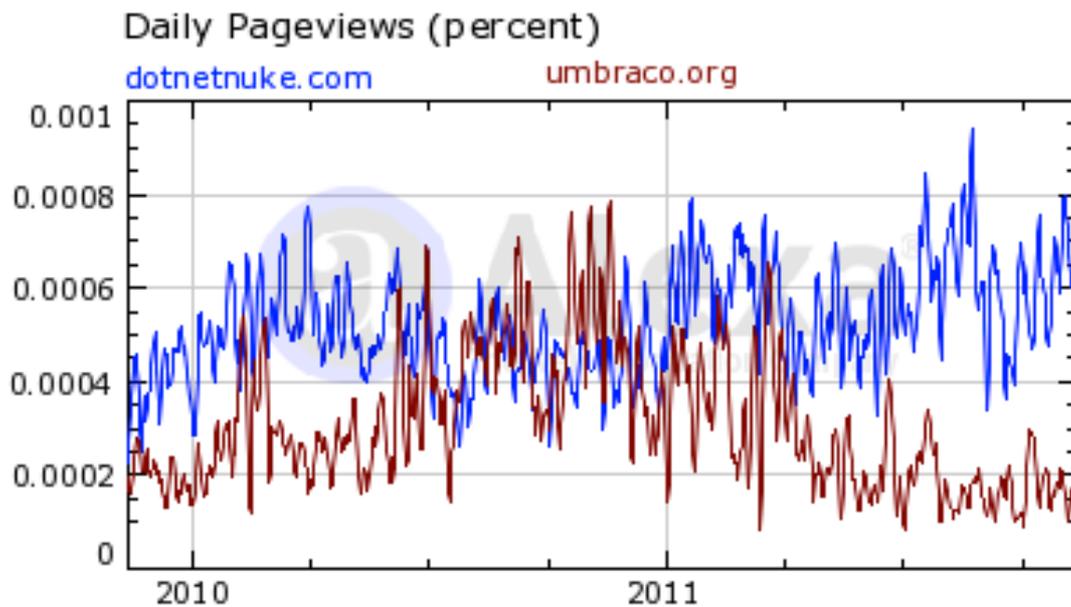


Exhibit 26: Notes on Interpretation

- Source: Alexa.com.

Despite the trends shown above, **DotNetNuke** remains in firm control over several key brand strength metrics.

- **DotNetNuke** adoption levels far outstrip with **Umbraco**.
- Download numbers favor **DotNetNuke** by better than three to one²⁶.
- Looking at the Alexa One Million, we find **DotNetNuke** in fifth place in our survey set, while **Umbraco** is one of the four lowest ranked systems²⁷.
- The numbers are even more dramatic according to BuiltWith, who found over 100,000 **DotNetNuke**-powered sites, in comparison to less than 4,000 **Umbraco**-powered sites²⁸.
- In terms of brand familiarity, **DotNetNuke** retains a significant lead over **Umbraco**: **DotNetNuke** finished fourth in that metric; **Umbraco** finished 14th²⁹.

Not all metrics, however, favor **DotNetNuke**. In a change from last year, share of voice metrics have shifted in favor of **Umbraco**. While last year **DotNetNuke** lead that metric across the board, this year **Umbraco** lead in both Twitter mentions and in Social Bookmarking. **DotNetNuke** retained a lead in Blog Mentions and on Facebook, though in the case of the latter, the lead was slim. In reputation metrics, the two systems are essentially tied.

In conclusion, the .NET race remains one of the most interesting in terms of changes from year to year. We will continue to watch this race carefully across the next 12 months.

²⁶ See, Exhibit 1, Project Downloads.

²⁷ See, Exhibit 3, The Alexa One Million.

²⁸ See, Exhibit 4, Live Installations, as per BuiltWith

²⁹ See, Exhibit 10, Brand Familiarity. It is also worth noting that **Umbraco** showed improvement in this metric in 2011.

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.

Exhibit 27, below, allows us to compare search interest in the three Java systems over the last 5 years. While **Alfresco** and **Liferay** show an ongoing and vital battle for market share, **OpenCms** continues to struggle to gain a toe hold in a market dominated by two strong players.

Exhibit 27 - Java Search Query Volume over 5 years

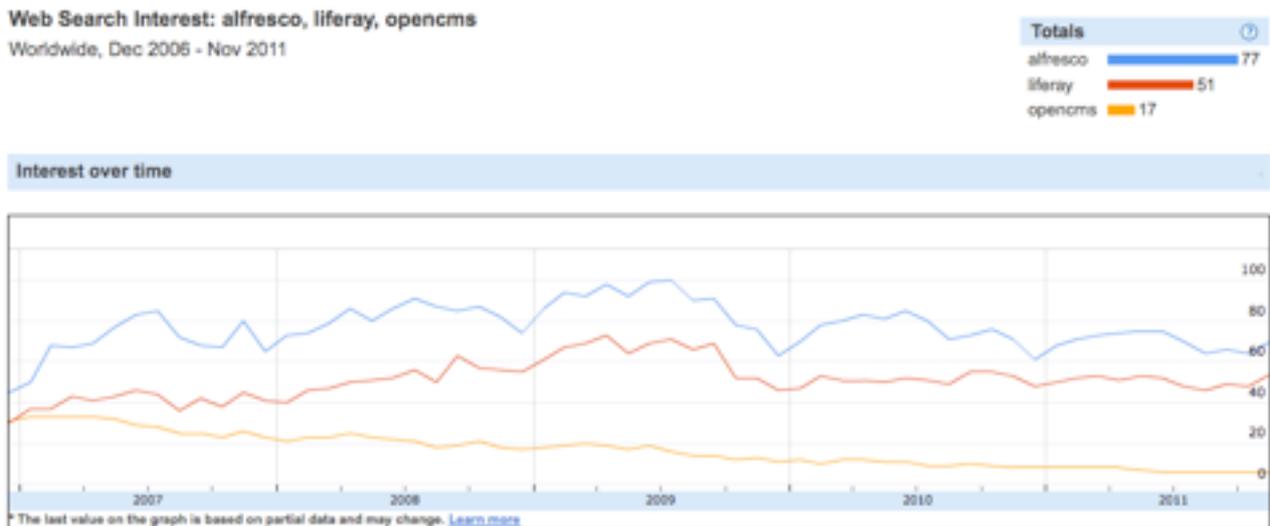


Exhibit 27: Notes on Interpretation

- **OpenCms** has seen consistent decreases in search interest since mid-2007.
- The gap between Alfresco and Liferay has remained fairly constant since early 2009, though, as you can see more clearly in Exhibit 28, below, the gap narrowed somewhat in Q3 of 2011.

Exhibit 28 - Java Search Query Volume over 12 months



Project site traffic patterns seem to indicate that **Alfresco** and **Liferay** are very closely matched.

Exhibit 29 - Java Project Site Daily Traffic

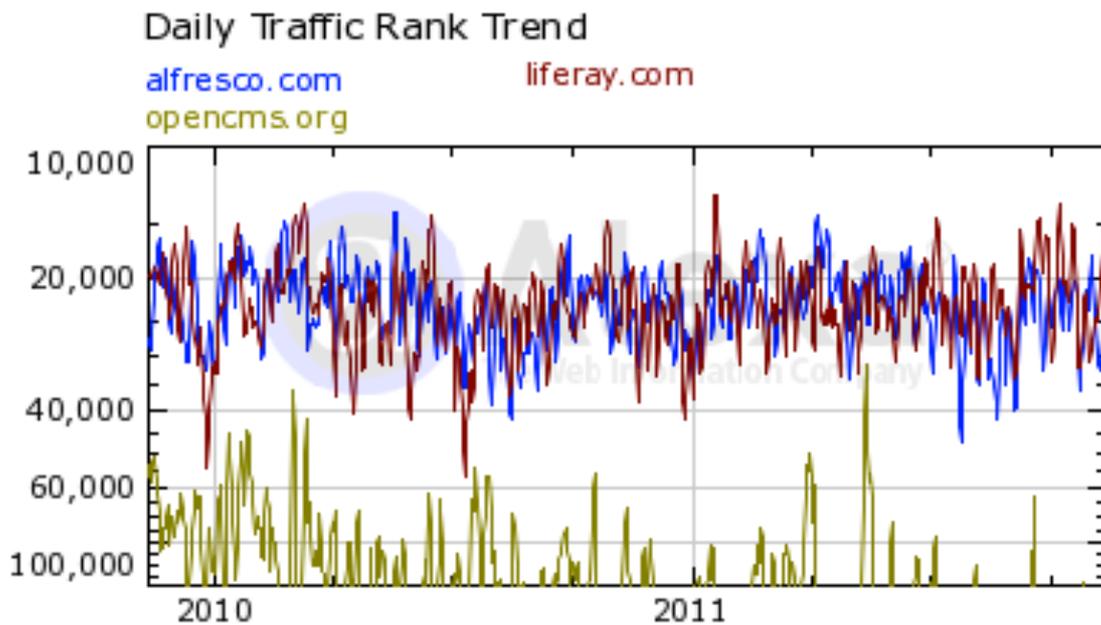
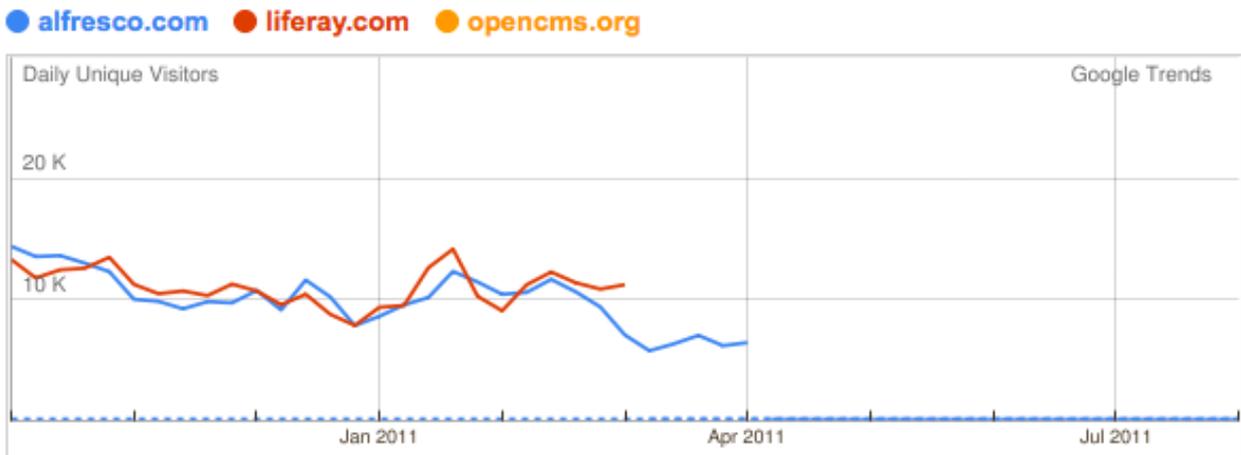


Exhibit 29: Notes on Interpretation

- Source: Top chart, Google. Bottom chart: Alexa.com.
- This Alexa chart also implies decreasing traffic at **OpenCms** during 2011.

While we feel comfortable concluding the **OpenCms** is the laggard in this group, the comparisons between **Alfresco** and **Liferay** are more complex.

- **Downloads: Liferay** leads **Alfresco** by 15%; this is a much narrower gap (by 50%) than was seen in the 2010 Report³⁰.

³⁰ See, Exhibit 1, Project Downloads.

- **Installations:** According to the survey³¹, **Liferay** has a considerable lead in installations, but given a lack of third party data to corroborate this, it is difficult to reach a firm conclusion on this point³².
- **Third Party Support:** The systems are too close to call.
- **Familiarity: Alfresco** enjoys a clear lead over **Liferay** in this metric³³.
- **Reputation:** Brand Sentiment is too close to call³⁴. However, **Liferay** clearly leads in both Conversion Rates and Abandonment³⁵.

While, in the 2010 Report, we declared **Liferay** the leader in the Open Source Java CMS race, this year we have to say that the race is too close to call. While there is no doubt that **Liferay** retains the lead in several key metrics, the gap between the systems has narrowed, and in some places closed.

³¹ See, Exhibit 2, Installations as per Survey.

³² It should also be noted at this point that **Liferay** did promote the survey much more extensively to their community than **Alfresco**.

³³ See, Exhibit 10 Brand Familiarity.

³⁴ See, Exhibit 16, Brand Sentiment.

³⁵ See, Exhibits 17 and 18, respectively.

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 market share and cause us to express concern. We also found several systems that showed increased brand recognition and improved market share and are well-positioned to perform well in 2012.

We group the systems into three categories:

- **Gathering Strength**
- **Cause for Concern**
- **Projects at Risk**

Gathering Strength

Looking beyond The Big 3 for a moment, we found other systems that exhibit strength, growing interest, and in some cases solid market share.

In the section we highlight:

- **Concrete5**

Exhibit 30 - Concrete5 Search Query Volume over 3 Years

Web Search Interest: concrete5
Worldwide, Nov 2008 - Oct 2011



Exhibit 30: Notes on Interpretation

- Shows search query interest on Google.com since Q4 2008

Concrete5

Concrete5 had the best 12 month period of any CMS in this survey:

- **Installations:** Though **Concrete5** was only #12 in weekly downloads, they showed the most year-on-year improvement of any system in the survey - up 517%³⁶. The system also came in at #3 in total installations, as per the survey³⁷ -- up from #10 last year. Installation data from the survey was also validated by the BuiltWith data which showed **Concrete5** in 7th position³⁸, a remarkably strong performance for such a young system.
- **Third Party Support:** **Concrete5** showed a second year of strong growth in the Developer Support metric³⁹.
- **Search Engine Visibility:** The project site shows the largest gain of any system in the survey - for the second year running⁴⁰.
- **Project Site Popularity:** **Concrete5** showed the second largest increase in Alexa rank⁴¹.
- **Mindshare:** **Concrete5** placed last in Brand Familiarity last year; this year, the system came in 6th.
- **Reputation:** In this section of the Report, **Concrete5** excelled, leading the group in Brand Sentiment⁴², Abandonment⁴³ and Product Preference⁴⁴ and coming in 2d in Conversion Rate⁴⁵.

Though **Concrete5** still lags the Big 3 in terms of total market share, no other system we looked at came close to showing the growth seen by **Concrete5**. The fact that the system also performed well in the 2010 Report leads us to the conclusion that **Concrete5** is a contender, and bears close watch.

³⁶ See, Exhibit 1, Downloads.

³⁷ See, Exhibit 2, Installations as per Survey.

³⁸ See, Exhibit 4, Live Installations, as per BuiltWith.

³⁹ #2 on Elance, #3 on Guru (see, Exhibit 5).

⁴⁰ See, Exhibit 7. Up 11 places this year; up 35 places last year.

⁴¹ See, Exhibit 9, Alexa Rank,

⁴² See, Exhibit 16, Brand Sentiment

⁴³ See, Exhibit 18, Abandonment

⁴⁴ See< exhibit 19, Preference

⁴⁵ See, Exhibit 17, Conversion Rate

Concrete5 Usage Trends

concrete5 is a free open source content management system.

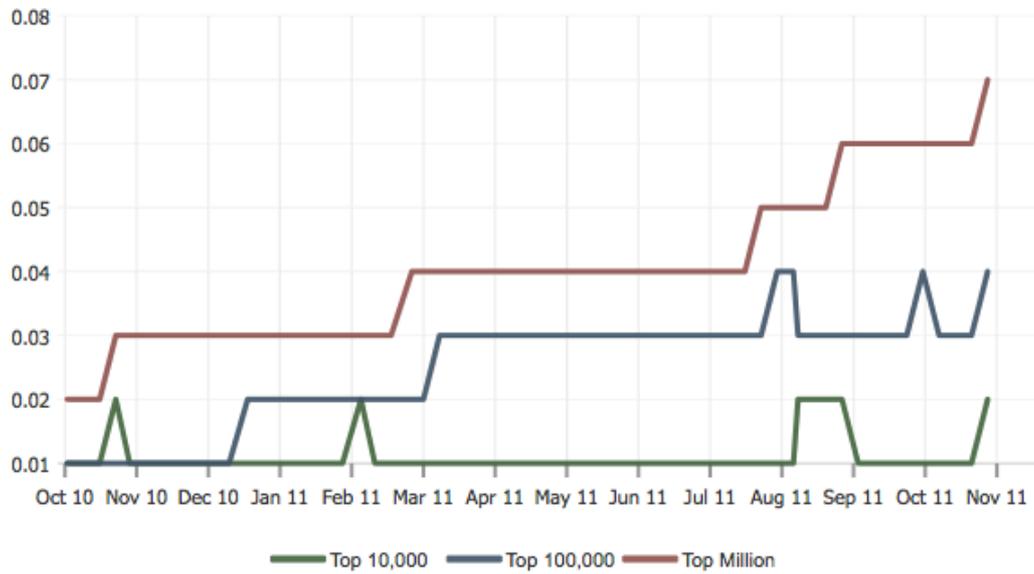


Exhibit 31: Notes on Interpretation

- Shows 12 month trend in live installations, as per BuiltWith.
- The scale on the left represents the percentage of sites in their sample set that are running Concrete5.
- Note that there are 3 scales: The Top 10,000 sites, the Top 100,000 sites, the Top Million sites.

Cause for Concern

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

- **Joomla!**
- **Plone**

Joomla!

We include Joomla! in this section out of concern over serious deterioration in several metrics:

- **Adoption: Joomla!** downloads decreased for the second year running, falling a total of 54.3% across the last 2 years⁴⁶. Though that number is limited to English-language core downloads, and hence does not consider the system's strength in secondary languages, the number -- and the trend -- is significant. Moreover, in the survey, the number of respondents reporting that they currently use **Joomla!** showed the largest decrease of any system in the survey - a startling 75.3% drop over the 2010 levels⁴⁷.
- **Third Party Support:** Publishing activity is down for the third year in a row.
- **Reputation: Joomla!** suffered a major drop in Brand Sentiment, falling 11 places -- the largest drop of any system in the survey by a significant margin⁴⁸. Conversion rates also fell by approximately 50%⁴⁹. Abandonment more than doubled -- the largest drop in the survey⁵⁰. In the 2010 Product Preference metric, Joomla! lead the field by a margin of 3:1. This year, the system had not only lost it's enormous lead, but had fallen to third place, just barely ahead of **DotNetNuke**⁵¹.

While we do not doubt that **Joomla!** is one of the market leaders, we add them to this section of the Report out of concern for the negative factors listed above. The Reputation indicators, in particular, are troubling. It is our opinion that if steps are not taken to address the underlying issues that are leading to these trends, the system's market share is likely to slide in the near to medium term.

⁴⁶ See, Exhibit 1, Downloads

⁴⁷ See, Exhibit 2, Installations, as per Survey

⁴⁸ See, Exhibit 16, Brand Sentiment

⁴⁹ See, Exhibit 17, Conversion Rate

⁵⁰ See, Exhibit 18, Abandonment

⁵¹ See, Exhibit 19, Preference

Web Search Interest: Joomla!
Worldwide, Nov 2006 - Oct 2011

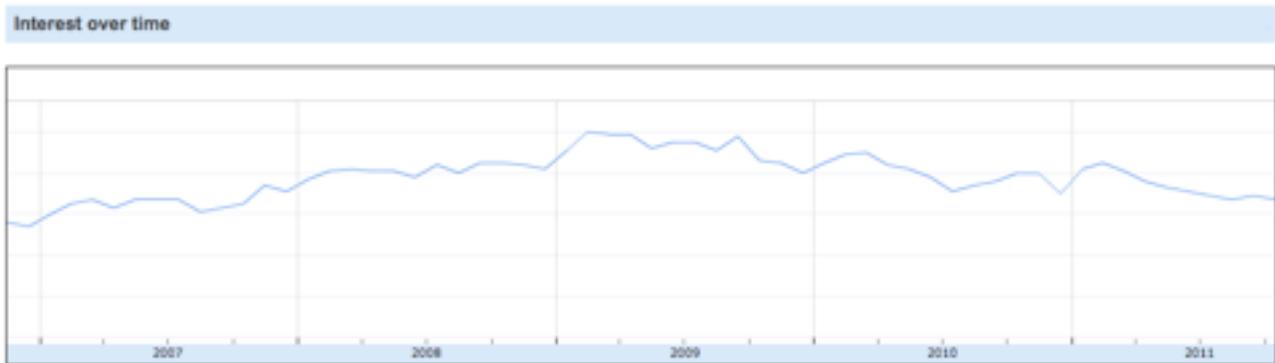


Exhibit 32: Notes on Interpretation

- Search query interest in Joomla! peaked in early 2009 and has consistently trended downwards since; present levels are the lowest since mid-2007.

Plone

In what has become an annual tradition, for the fourth year running, we list **Plone** in this section of the Report. We believe **Plone** has cause for concern due to the following:

- **Brand Sentiment:** **Plone** finished 15th in this ranking, down 4 places from last year's Report.
- **Conversions:** For the second year running, **Plone** performed very poorly in this metric. The system was ranked 17th this year⁵².
- **Abandonment:** Only **Movable Type** showed a higher abandonment rate than **Plone**. In last year's survey, the system was ranked 17th.

Additionally, as the chart on the next page demonstrates, interest levels in the system continue to slip.

In fairness to the system, not all the news is bad:

- **Plone** shows the fourth highest weekly download figures⁵³.
- **Plone** installations were up slightly, according to the survey⁵⁴. Similarly, live installation figures from BuiltWith show **Plone** ranking in the Top 50% of the survey set⁵⁵.

⁵² Admittedly, an improvement over last year, when the system placed last in this metric.

⁵³ See, Exhibit 1, Downloads. Unfortunately, as this is the first year we've been able to obtain the download stats, we do not have any insight into the trend.

⁵⁴ See, Exhibit 2, Installations as per Survey

⁵⁵ See, Exhibit 4, Live Installations, as per BuiltWith

- **Plone** continues to see growth in support from developers and publishers, albeit at rates lower than the average⁵⁶.
- **Plone** Brand Familiarity ranks in the top 50% of the survey set⁵⁷.
- **Plone** ranks #4 in the Social Bookmarking metric⁵⁸.

While we don't think **Plone** is going to go away any time soon, we are concerned that the slide in rankings has not abated.

Exhibit 33 - 5 year Trend in Plone Search Query Levels

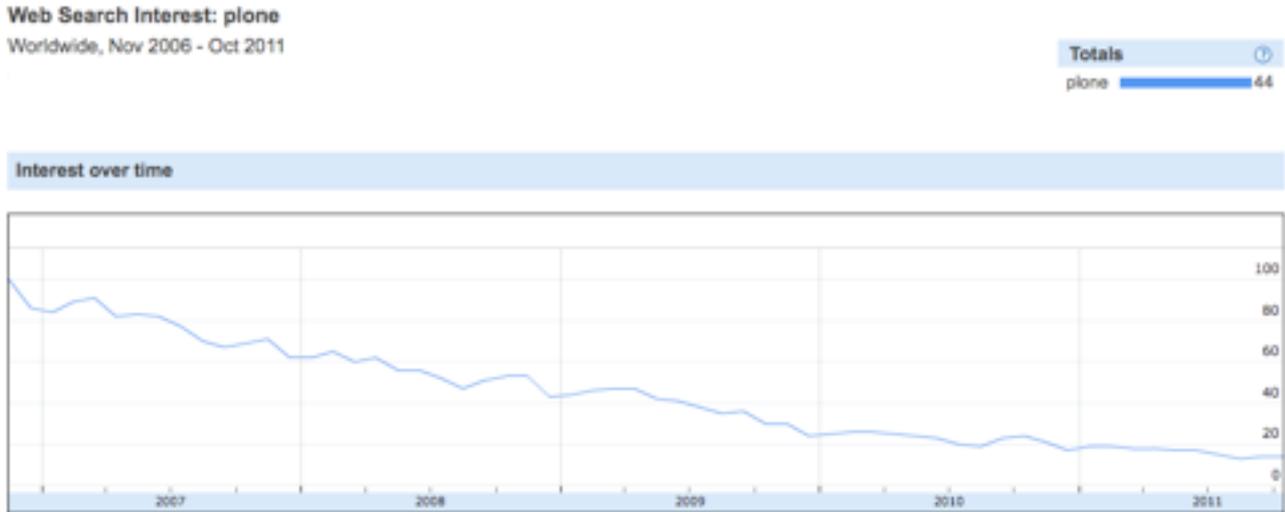


Exhibit 33: Notes on Interpretation

- Shows historical search query interest on Google.com over the last 5 years.

⁵⁶ See, Exhibits 5 & 6.

⁵⁷ See, Exhibit 10, Brand Familiarity

⁵⁸ See, Exhibit 12, Share of Voice: Social Bookmarking

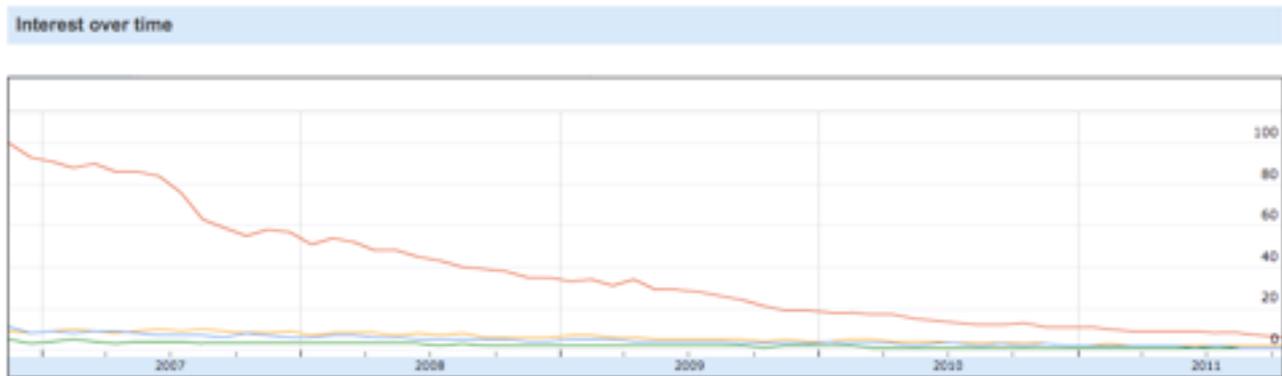
Projects at Risk

In this section of the paper we raise the question of whether one or more of our systems are at risk of falling out of the Top 20. This year we single out four systems as projects that are potentially at risk:

- **e107**
- **Movable Type**
- **Textpattern**
- **Xoops**

Exhibit 34 - Search Interest in At Risk Projects

Web Search Interest: e107, xoops, movable type, textpattern
Worldwide, Nov 2006 - Oct 2011



e107

e107 finished last in Brand Familiarity and Brand Sentiment and placed in the bottom 50% of all but three⁵⁹ of the metrics in this Report. Additionally, the system showed a general drop in interest levels over last year. There was a lag in Share of Voice indicators and a 116% drop in Alexa ranking. Significantly, e107 also showed the lowest growth rates in developer support⁶⁰.

Perhaps the most negative indicator, however, is the average weekly downloads statistic: **e107** is the only system in the Report to show three consecutive years of decreasing downloads.

The chart on the next page shows a decrease in live installations over the last 12 months, as per W3Techs.

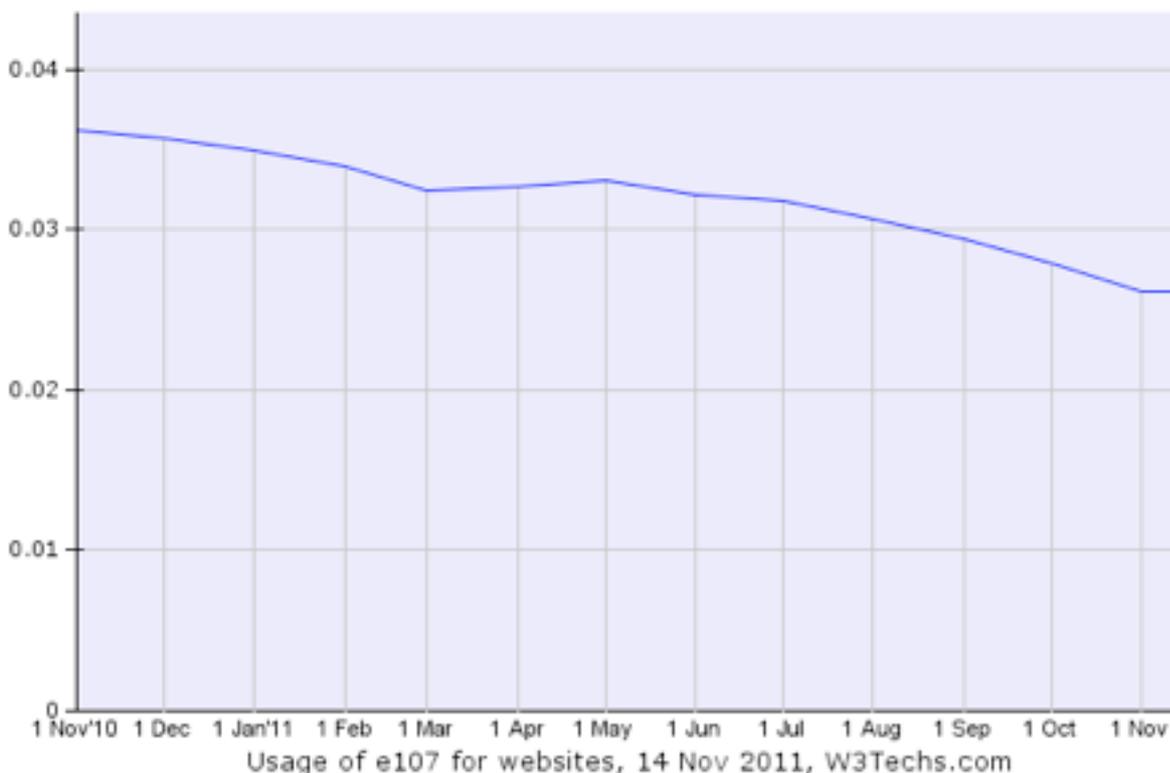
⁵⁹ Query Volume (9th), Conversion Rate (10th), Abandonment (9th)

⁶⁰ See, Exhibit 5, Developer Support

Historical trend

Exhibit 35 - e107 Installations Figures

This diagram shows the historical trend in the percentage of websites using e107.



Movable Type

The recent history of **Movable Type** shows a degree of disruption. SixApart, the company behind **Movable Type** was sold, and the **Movable Type** codeset was also the subject of a fork. Both events are impacting the system.

The fork, known as Melody, is gathering strength, apparently (at least to some extent) at the expense of the original system. While **Movable Type** continues to develop and release code, the project seems to be waning in vitality. The chart on the next page, from Ohloh.net⁶¹, gives some idea of the relative activity levels of the two projects. Since the launch of the Melody project in 2009, a number of developers appear to have shifted their efforts away from **Movable Type**.

⁶¹ Ohloh is an open source project database and analytics service maintained by Black Duck Software.

Number of contributors who made changes to the project source code each month.

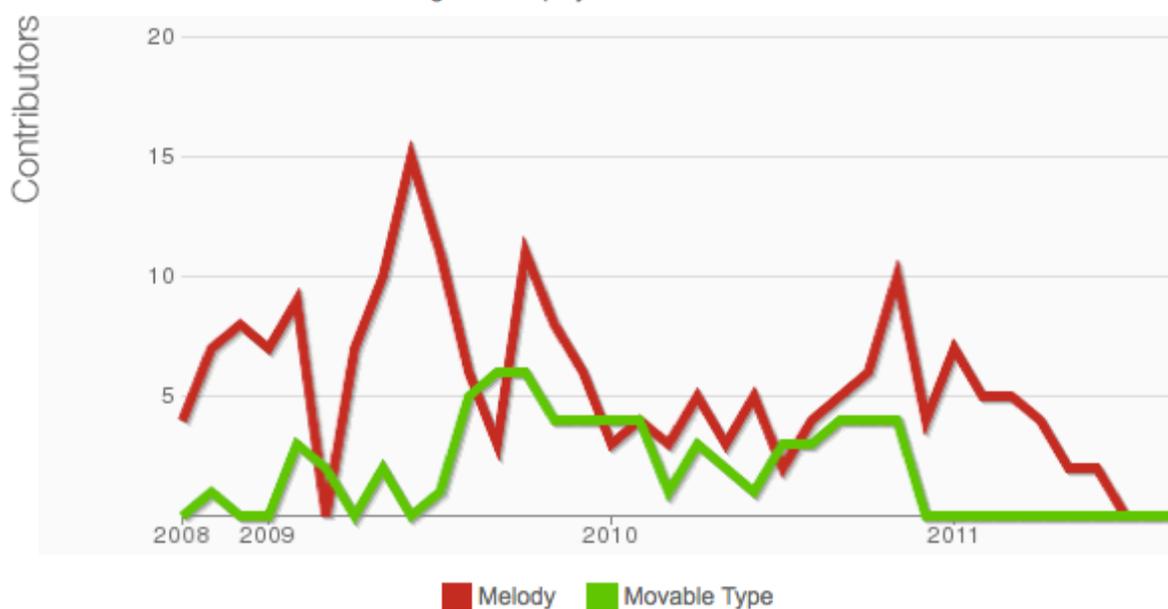


Exhibit 36: Notes on Interpretation

- The large drop in **Movable Type** activity seen in the chart above, appears to coincide with the sale of Movable Type's backing firm, SixApart⁶².

Of even larger concern for **Movable Type**: It appears that the users are also moving away from the system. **Movable Type** showed the highest abandonment figures of any system in the survey - by a considerable margin⁶³. In our survey, out of over 2,500 respondents, not a single person indicated that they preferred **Movable Type**.⁶⁴

Taking all of those facts into account, we have to wonder whether **Movable Type** will remain in the Top 20 in 2012.

⁶² See, <http://www.sixapart.com/blog/2011/01/sixapart-japan-to-be-acquired.html>

⁶³ See, Exhibit 18, Abandonment.

⁶⁴ According to Google Insights, interest in **Movable Type** remains strong in Japan. We had very few survey respondents from Japan, which may also help explain the lack of interest reflected in the survey results.

Textpattern

We listed **Textpattern** as a Project at Risk in both the 2009 and 2010 Reports; we re-iterate that rating in this Report. Looking at the data set this year, we find **Textpattern's** slide has continued.

In terms of adoption metrics, the system had the lowest average weekly downloads.

Third Party support remains very low⁶⁵. Search interest levels were next to last in both this year and last year's Reports. Similarly, in terms of Brand Familiarity, the system has come in next to last in the last two Reports.

Despite the negative factors, there are some bright spots:

- The number installations found in the survey set increased dramatically⁶⁶.
- Brand Sentiment remains solid (#5)⁶⁷.
- Conversions Rates are quite good (#7)⁶⁸.
- Abandonment: The system ranks #3, behind only **Concrete5** and **Liferay**⁶⁹.
- Product Preference ranking is good (#7)⁷⁰.

Given the longevity of this system, the evidence seems to point to a diehard cadre of fans who have tried it, like it, and aren't inclined to switch. The challenge, will be whether **Textpattern** can break out of this coterie and into a larger role in this highly competitive market.

⁶⁵ See e.g., Exhibits 5 & 6.

⁶⁶ See, Exhibit 2, Installations as per Survey.

⁶⁷ See, Exhibit 16, Brand Sentiment.

⁶⁸ See, Exhibit 17, Conversion Rate.

⁶⁹ See, Exhibit 18, Abandonment.

⁷⁰ See, Exhibit 19, Preference.

Xoops

We listed **Xoops** as “at risk” in the 2010 Report. In 2011, we find that the project’s position has not improved⁷¹. Indeed, in several indicators it has continued to decline:

- **Downloads:** Only two systems showed lower weekly download averages than **Xoops** this year. Moreover, **Xoops** downloads figures were down 28% over last year. While the download averages were up slightly in 2010, in the 2009 Report, we also found a significant decrease⁷². Looking at system across the four years we have gathered data, we see a decrease in downloads of 40.6%.
- **Search Engine Query Volume:** Since 2009, **Xoops** shows the largest decrease of any system, down 73%.
- **Developer Support:** Growth numbers are well below the averages⁷³.
- **Brand Familiarity:** Xoops ranked #11 in the 2010 Report; they have fallen to #15 in this Report⁷⁴.

Xoops is an older project, and retains market share in parts of Asia⁷⁵. The systems still shows a significant number of installations⁷⁶ and indeed, in this year’s survey, more respondents reported installations than in 2010. However, we think it clear that the downwards trend we have reported in the previous two years continues.

⁷¹ See e.g., Exhibit 16, Brand Sentiment. The project is next to last - the same position as last year.

⁷² We reported in the 2009 Report at 28.2% decrease in **Xoops** downloads over 2008.

⁷³ See, Exhibit 5, Developer Support

⁷⁴ See, Exhibit 10, Brand Familiarity

⁷⁵ Japan and Taiwan, in particular. See, Google Insights.

⁷⁶ See e.g., Exhibits 3 & 4.

Project Sites

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

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 500 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. 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 six years he has published books on the Mambo, Joomla!, Drupal and WordPress content management systems.

You can contact Ric about this report using the details below, or by email at: ric@waterandstone.com

Contact Details

23a Jalan Raya Semer

Kerobokan, Kuta

Bali, Indonesia

80361

T 62 361 739 969

contactus@waterandstone.com

Web: www.waterandstone.com

Facebook: www.facebook.com/waterandstone

Twitter: www.twitter.com/waterandstone