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CMS Survey Report 2009

in association with Squiz.net

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CMS Survey Report 2009

Squiz.net



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1. Executive Summary and Highlights

This is Econsultancy's first Content Management Systems (CMS) survey report, which has been produced in association with Squiz. There were more than 800 respondents to our research request, which took the form of an online survey¹ live in March and April 2009.

Respondents included both client-side (in-house) organisations currently using a CMS and supply-side respondents (i.e. those working for CMS vendors or for third parties implementing CMS). The majority of respondents are based in the UK.

Key findings:

- Companies are investing heavily in CMS. A third of responding organisations (35%) are spending at least £10,000 a year on their CMS licence, and this goes up to 70% for the largest organisations (more than 1,000 employees). Almost half (48%) of the largest companies are spending more than £50,000 annually and 5% are paying more than £1m.
- The majority of companies say their spending on CMS *licences* and *support* will remain the same over the next 12 months. Companies are most likely to be increasing their spending on *implementation*, with 45% of companies planning a budget increase in this area.

Other findings:

Purpose of CMS and key features

- Just over a quarter (26%) of companies surveyed use their CMS primarily for *publishing*, while slightly fewer (23%) use it mainly for *marketing purposes*.

Spending and Value

- Just over half of companies (53%) are spending less than £5,000 on their CMS licence annually, and this percentage increases to 70% of companies with fewer than 100 employees.

Type of CMS and vendor selection

- Over half of companies surveyed (54%) have used their CMS for up to two years, of whom 30% say they have used their software for one year or less.

Barriers to success

- The *difficulty of using CMS* is deemed to be the biggest reason for an unsuccessful implementation.

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2. Introduction by Squiz (survey sponsor)

In tandem with Econsultancy, we're delighted to bring you the 2009 CMS Survey Report. We hope you find it valuable as a pulse check on buying patterns and an inside view on what your peers are up to.

Clearly, in the midst of a recession, any buying study of this nature will focus on keeping a lid on costs. Where Web Content Management is concerned it's interesting to see how the market is reacting to these needs. Sunk, fixed spends – on items like software licences and support – are flat lining (or being reduced), whilst the appetite for more flexible items like implementation is on the rise.

This is good news for the CMS vendor community. But, crucially, it speaks to one big difference to yesteryear's market. When budgets are being slashed, the focus rightly shifts to getting value for money. Recessions have a habit of doing this. Customers examine their costs harder and ask the kind of questions that really ought to have been raised before. Consequently, 'corrections' occur. Fads disappear, pricing is adjusted, and – as we're seeing now – alternative methods are blessed.

At Squiz we welcome this kind of change. (We know a thing or two about thriving in a recession - we were born in the eye of a storm, back in the heady days of the dotcom bubble.) In reality, this focus on implementation isn't a new trend. Over the past couple of years we've seen more and more software development being outsourced in more sustainable ways - making it more cost-effective and flexible to ramp development efforts up or down. At the same time, the world is enjoying an explosion in Software-as-a-Service (SaaS) - making it far easier to rapidly deploy fit-for-purpose, standard application types...

Both of these things point to the fact that companies are becoming more comfortable with new ways of 'owning' software. Ultimately, these new('ish) modes of software acquisition have helped large organisations like EMAP and Royal Mail to ask new questions about how they build and maintain their web sites ... and, as a result, rather than lump all their resources together in a mammoth round of complex licence schemes, they've chosen to deploy our Supported Open Source Content Management System, MySource Matrix.

Like EMAP and Royal Mail, the fundamental questions most customers are asking today are 'what does it really cost to build a new web site?' and 'which budget line items are the most essential to the success of the project?'

Unfortunately for vendors whose licence schemes typically cost hundreds of thousands of dollars, this line of enquiry can get a bit uncomfortable ...because, in and of itself, a licence fee buys nothing more than the ability to put a CD on the shelf.

So our message to you is: implementation of a CMS is everything. Save some money for things like design, custom development, and training by evaluating an Open Source CMS (and Supported Open Source in particular) and taking the licence fee out of the equation. After all, it's what you do with it that really counts.

Ben Wales, General Manager, Squiz UK

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3. About Econsultancy

Econsultancy is the leading source of independent advice and insight on digital marketing and e-commerce.

Our reports, events, online resources and training programmes help a community of over 80,000 registered marketers make better decisions, build business cases, find the best suppliers, look smart in meetings and accelerate their careers.

Econsultancy is an [award-winning online publisher of reports](#) covering best practice, user experience benchmarking, market data, trends and innovation, and supplier selection aimed at internet professionals that want practical advice on all aspects of e-business.

Econsultancy also operates a highly popular [training](#) division, used by some of the world's most prominent brands for staff education, both in-house and via public courses. We provide training across all areas of digital marketing and at all levels from one day courses to diplomas to Masters in Digital Marketing.

In addition, we host more than 100 [conferences and events](#) a year, such as The Online Marketing Masterclass, regular Supplier Showcases and Roundtables, an annual Future of Digital Marketing event, Digital Cream and a range of social events.

The [Econsultancy](#) site now attracts 175,000 unique users per month where they access research, read the blog and take part in discussions in the forums. And as a portal to the digital marketing community, Econsultancy members can also link up with other members and digital suppliers through our directories, as well as find a new job or new digital talent using the job listings.

Some of Econsultancy's client-side members include: Google, Yahoo, MSN, MySpace, BBC, BT, Shell, Vodafone, Yell.com, Dell, Oxfam, Virgin Atlantic, TUI, Barclays, Carphone Warehouse, IPC Media, Deloitte, T-Mobile and Estée Lauder.

[Join Econsultancy](#) today to learn what's happening in digital marketing – and what works.

Call us to find out more on +44 (0)20 7681 4052 or [contact us online](#).
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4. About Squiz

Squiz is a 'Supported Open Source' enterprise software company, founded in Sydney, Australia in 1998.

We produce the enterprise-class Open Source Content Management System (CMS), MySource Matrix, and deliver progressive MySource Matrix CMS service solutions to customers around the world from our network of sales and support centres in Australasia and Europe.

Many of the world's leading brands - including Boots, Oxford University, EMAP, The Australian Federal Government, Royal Mail and the UK's Electoral Commission and National Health Service - use the MySource Matrix Open Source CMS to drive their web strategy forwards.

The Squiz business model is deliberately different. Whilst the product itself is open source (and therefore free), we earn money by providing a warranted, supported version of the product and through the provision of surrounding services such as enterprise-class implementation, support, SLAs and training.

Unlike proprietary software vendors, our goal is not simply to offload Matrix and charge customers for its acquisition (e.g. the licence fee model). Instead, we're compensated on the successful completion of customer projects – on time, on budget and to an acceptable standard. As a result, every penny of our customer spending contributes to the delivery of a finished solution, making our outlook, software and services perfectly aligned with the needs of our customers.

As a Supported Open Source product, MySource Matrix enables customers to realise new value in their web content management processes by focusing budgets and development work on those things that contribute most to project success, such as custom development, training, project management, system design, SLAs and product lifecycle support.

<http://www.squiz.co.uk/>

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5. Methodology and Sample

5.1. Methodology

This is Econsultancy's first CMS survey report, which has been produced in association with Squiz. There were more than 800 respondents to our research request, which took the form of an online survey² live in March and April 2009.

Respondents included both client-side (in-house) organisations currently using a CMS and supply-side respondents (those working for CMS vendors or for third parties implementing CMS). The findings are shown for both client-side (or 'company respondents') and supply-side ('agency respondents') separately.

Information about the survey, including the link, was emailed to Econsultancy's user base and promoted online via Twitter and other channels. The incentive for taking part was access to a complimentary copy of this report just before its publication on the Econsultancy website.

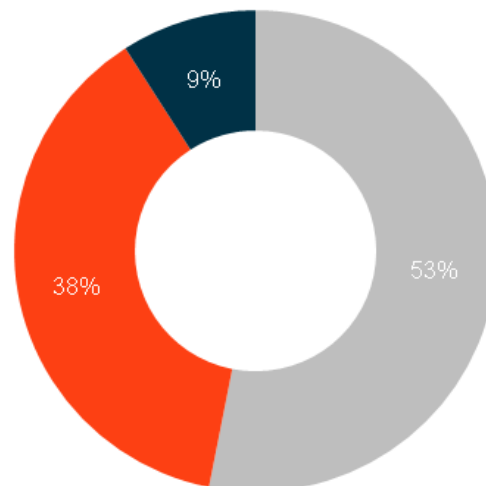
If you have any questions about the research, please email Econsultancy's Research Director, Linus Gregoriadis (Linus@econsultancy.com).

5.2. Respondent profiles

5.2.1. Role within responding organisation

More than 400 of respondents surveyed (just over half) work for organisations currently using a CMS. The remaining respondents work for either a CMS vendor or for companies advising on or implementing a CMS system.

Figure 1: Which of the following most accurately describes your job role?



- Client-side - My organisation uses a content management system
- Supply-side - I work for a CMS vendor or for a company advising on, or implementing, CMS
- Neither

Response: 838

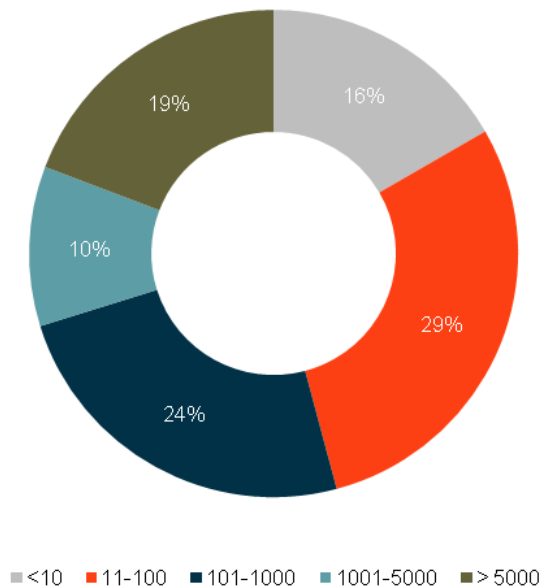
² Econsultancy uses Clicktools for its online surveys

5.2.2. Size of organisation

Figure 2 shows the spread of companies according to how many employees they have. Some 45% of companies have up to 100 employees, compared to 53% who have more than 100 staff members. The supply-side organisations taking part in this survey are typically smaller, with the vast majority (87%) hiring under 100 employees.

Companies

Figure 2: How many employees are there in your organisation?



Response: 318

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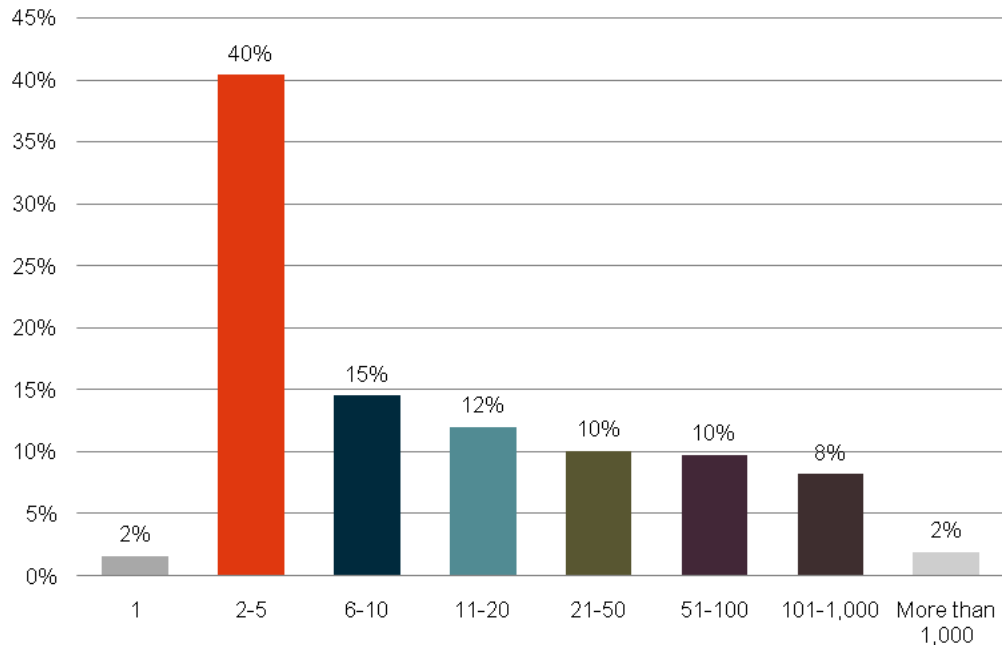
<http://econsultancy.com/reports/cms-survey-report>



5.2.3. Number of employees contributing to content

Some 40% of companies surveyed have between two and five employees within their organisation currently contributing to content on their website. At the higher end of the scale, 10% have more than 100 people contributing to content on the site. *Figure 5* shows this split by company size.

Figure 3: How many people within your organisation contribute to the content on your site?



Response: 317

Figure 4: How many people within your organisation contribute to the content on your site?

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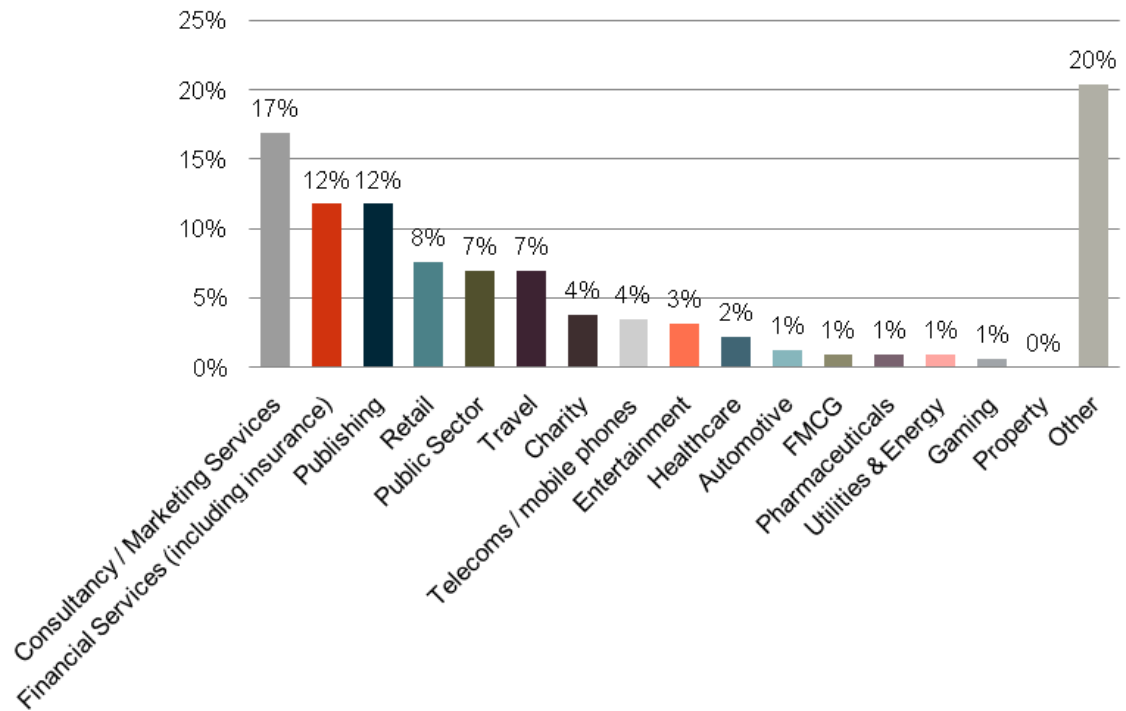
5.2.4. Business sector

The most strongly represented sectors among the in-house respondents are consultancy and marketing services (53 respondents), financial services (37), publishing (37), retail (24) and the public sector (22).

'Other' in this context includes educational services, professional services and software vendors.

Companies

Figure 5: In which business sector is your organisation?



Response: 314

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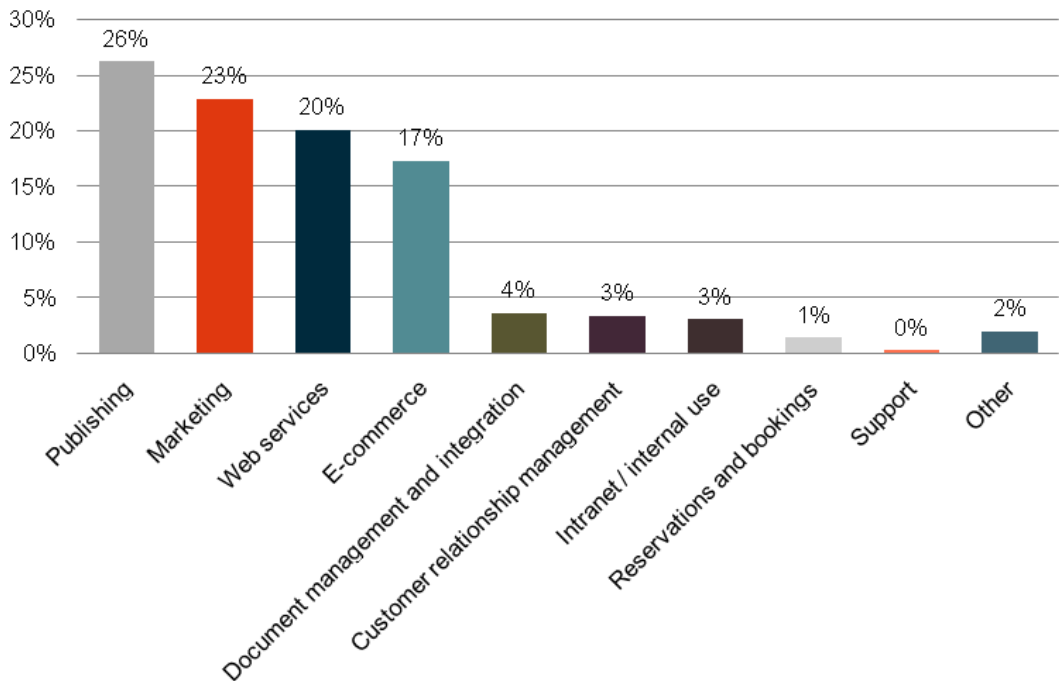
6. Findings

6.1. Purpose of CMS and key features

6.1.1. Main purpose of CMS

Just over a quarter (26%) of companies surveyed use their CMS primarily for *publishing*, while slightly fewer (23%) use it mainly for *marketing purposes*. Approximately a fifth of companies use their CMS for *web services* (20%) or for *e-commerce* (17%).

Figure 6: What is the main purpose of your CMS?



Response: 359

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Figure 10 shows the breakdown of results by company size. Larger companies (those with more than 1,000 employees) are most likely to use their CMS primarily for marketing (29%) or for web services (24%).



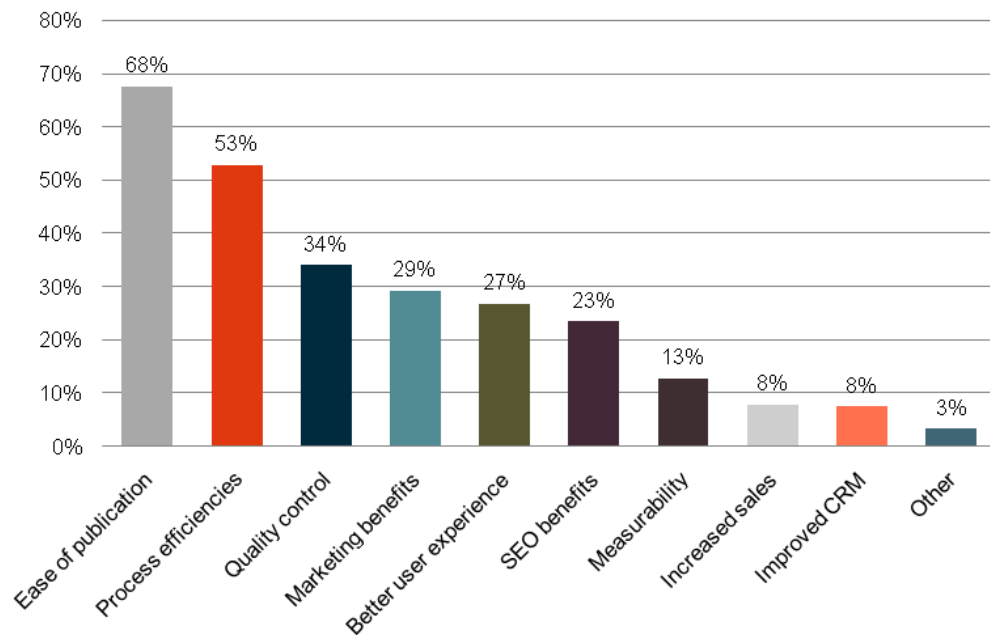
6.1.2. Advantages of using a CMS

Ease of publication is deemed to be a major advantage of using a CMS by two thirds of organisations surveyed (68%), while over half (53%) cite *process efficiencies* as a key benefit. A third of respondents (34%) cite *quality control* and 29% cite *marketing benefits* (29%) as main advantages of using a CMS.

Note: Respondents could check up to three options.

Companies

Figure 7: What are the main advantages of using a CMS?



Response: 358

6.1.3. Web 2.0 channels incorporated in web content management strategy

Companies and agencies are mostly in agreement about the digital marketing and 'Web 2.0' channels that are most important for web content management strategy, with *SEO* (86%), *personalisation of content* (75%) and *blogging* (61%) deemed by company respondents as most significant.

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6.2. Spending and value

6.2.1. Annual spend on CMS licence

Just over half of companies (53%) are spending less than £5,000 [Figure 22] on their CMS licence annually, and this percentage increases to 70% of companies with fewer than 100 employees.

6.2.2. Change in annual CMS spend

The majority of companies say that their spending on CMS *licences* and *support* will remain the same over the next 12 months.

6.2.3. Rating of CMS for value for money

More than half of companies (55%) surveyed rate their CMS as 'excellent' (27%) or 'good' (28%) for value for money, whilst another quarter (26%) rate it only as 'average'.

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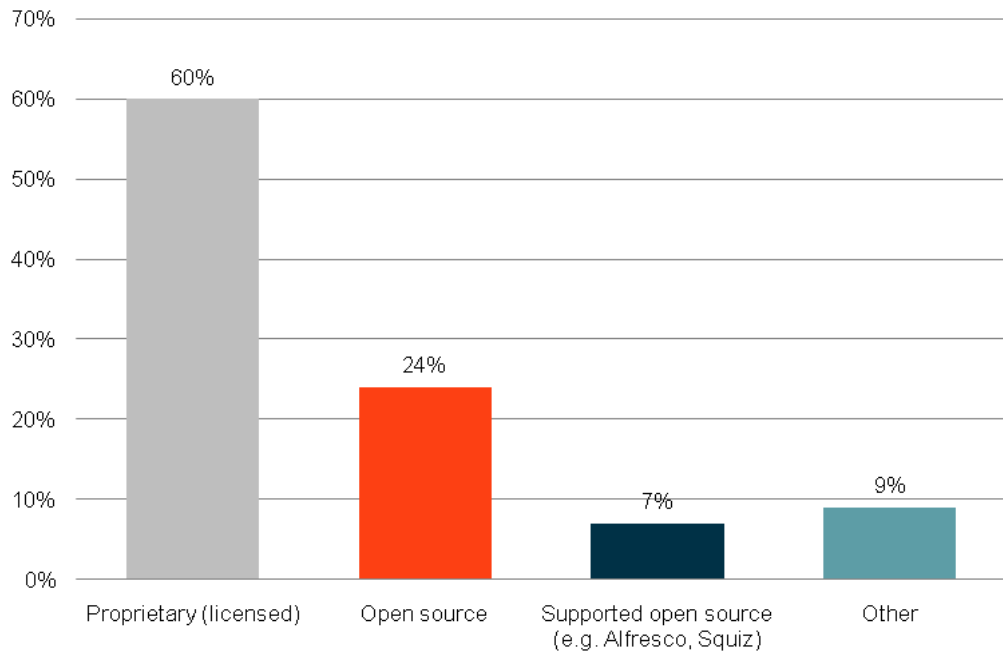
6.3. Type of CMS and vendor selection

6.3.1. Type of CMS

The majority of companies (60%) use *proprietary* software as their CMS, while 31% use either *open source* software (24%) or *supported open source* (7%).

Companies

Figure 8: What type of CMS do you use?



Response: 327

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6.4. Barriers to success

6.4.1. Reasons for an unsuccessful CMS implementation

The fact that a CMS system is *too difficult to use* is deemed to be the biggest reason for an unsuccessful CMS implementation, mentioned by 49% of company respondents [Figure 46] and 45% of agencies [Figure 46] as a top-three problem.

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6.4.2. Downsides of current CMS

The *lack of support for Web 2.0 functionality* is thought to be the most negative aspect of current content management systems, with nearly half of organisations surveyed (47%) regarding this as a downside.

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6.4.3. Additional features sought in a CMS

Companies were asked *what they would most like their CMS to do that it currently can't*. Compatibility with Web 2.0 functionality was mentioned by several responding companies. This will become even more crucial as companies further integrate Web 2.0 features into the main website.

Integration with Web 2.0, social networking and mobile

“Global editing, SEO and Web 2.0 functionality support.”

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Company respondents

6.4.4. Main problems in a CMS enterprise project lifecycle

Companies were asked what the main problems were in an enterprise project lifecycle.

From analysis of verbatim answers, it is clear that many companies struggle with aligning their business needs with the requirements of the CMS implementation.

It is important to understand that business needs may evolve through the lifetime of the CMS enterprise project, and hence it is crucial to continually review and update business objectives.

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