Evaluating the Landscape of Drupal Competition

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Drupal Camp New Jersey 2022

About Me

- Liker of
  - Running
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© Media Mode

About This Talk

- The CMS Market

- Survey of CMS Products

- Drupal as a Product

- Field Analysis

- Future Drupal Positioning

WARNING:

Opinions ahead

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Approach

- Defined the CMS market around Drupal and products that compete in market

- Identified criteria used by the field to evaluate CMS products

- Identified at supporting data to explain CMS product positioning in the market

- Read many online sources to identify product similarities and differences

- Attempts to validate findings with supporting evidence
  - Identify supporting data or product details that tries to justify positions
  - Relevant community and/or product documentation

- Provide potential opportunities for Drupal

SECTION 1:

The CMS Market

Personas

Who works with CMS products?

Implementers

- Developers
- Builders (Configuration)
- Themers (Visual Styling)
- IT Staff

Users

- Content Editors/Managers
- Marketers
- Purchasers

$123B in TAM

Total addressable CMS market by 2026 according to CMS Market Share

A **growth market** due to rise in businesses going digital

Source: https://www.tooltester.com/en/blog/cms-market-share/

Evaluation criteria

Field Criteria

What does the field look for in a product?

- Accessibility
- Multi-lingual
- Usability
- SEO
- Theming
- Security
- Content Modeling
- APIs/web services
- 3rd Party Integrations
- Vibrance
- Documentation
- Workflows
- Analytics
- Performance

- Extensibility
- Time-to-value
- Out-of-the-box
- Access Control
- Updates
- EoL Policy
- Community
- Support channels
- Partners/Vendors
- Learning curve
- Migration
- Regulatory
- DevOps
- Authoring

Market Segments

Potential adoption categories

- SMB and Enterprise

- Traditional CMS, Headless CMS, E-Commerce CMS
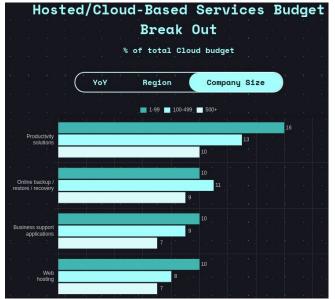
- PaaS or SaaS delivered

99.9% are SMB

The U.S. Small Business Administration Office of Advocacy generally defines a small business as "an independent business with fewer than 500 employees."
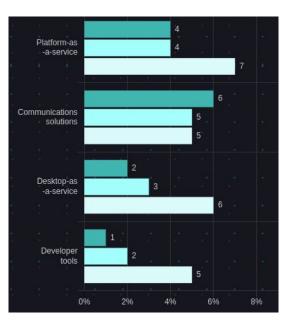
31.7 million businesses classify as small business

Source: https://www.hourly.io/post/number-of-small-business-in-the-us

IT budget analysis

"By company size, we assessed that **larger companies will allocate a greater portion of their budgets towards platform-as-a-service**, desktop-as-a-service, **and developer tools than smaller companies**."

Source:

CLAIMS:

Enterprise favors PaaS

SMB favors SaaS

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Mapping CMS criteria to market segments

PaaS experience

- Customizable and extensible, unassuming
- Requires more investment and potentially platform expertise
- Can address enterprise complexity with lower time to value but more
- Regulatory and system integration needs

SaaS experience

- Specific and common place features with predictable configurations
- Less extensible but more usable
- Commonly has usage-based pricing that is cost-effective for small businesses
- Great documentation and support

Enterprises have PaaS demands and can afford it

SMB can't afford PaaS and SaaS works for them

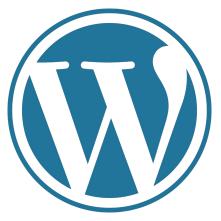# Businesses still choose a CMS based on their distinct needs

SECTION 2:

Survey of CMS Products

There are both niche and generic CMS products

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Content Management Frameworks (PaaS-based)

Common Criteria (General Purpose)

- Base level CMS capabilities/features
- Focus on developer ecosystem and/or open source communities
- Extensible and configurable for large number of use cases (not niche)
- Ecosystem of plugins

Traditional CMS Products (SaaS-based)

Common Criteria (Niche)

- Paid, proprietary offerings sometimes with free-tiered, limited usage
- Highly refined content editorial experience
- Commonly promotes omni-channel content delivery
- Specific set of low or no-code capabilities/features tied to traditional CMS page building
- Emphasizes out-of-the-box experience and fast time-to-value
- Well documented and readily available training/support material
- Feature Add-Ons with less vibrant developer ecosystems
- Common third party integrations often tied to partnerships with complementary products
- Focuses on SMB and may not be extensible enough for enterprise

Headless CMS Products (SaaS-based)

Common Criteria (Niche)

- Paid, proprietary offerings sometimes with free-tiered, limited usage
- Highly refined content editorial experience
- Focus on structured content modeling, interoperability, and unassumed consumers
- Specific set of low or no-code capabilities/features tied to API-based content delivery
- Emphasizes out-of-the-box experience and fast time-to-value
- Well documented and readily available training/support material
- Feature Add-Ons with less vibrant developer ecosystems
- Common third party integrations often tied to partnerships with complementary products
- Focuses on SMB and potentially part of a composable enterprise

e-Commerce CMS Products

Common Criteria (Niche)

- Paid, proprietary offerings sometimes with free-tiered, limited usage
- E-commerce features, like product or inventory management and purchasing
- Basic content editorial features, some paid add-ons, but more niche focus on commerce needs
- Limited or no structured content modeling
- Some interoperability for commerce backend API services with decoupled front-end
- Tailored out-of-the-box experience for commerce use-case and fast time-to-value
- Well documented and readily available training/support material
- Commonly required add-ons for third-party integrations: payment gateways or PIMs
- Common third party integrations often tied to partnerships with complementary products
- Vibrant partner and developer ecosystems
- Focuses on SMB and potentially a composable enterprise

SECTION 3

Drupal as a Product

A missing perspective

- A heavy focus on the developer community
  - Lots of community-specific conventions and practices
  - Issue queues are heavily dominated by technical discussion
  - A steep learning curve that hurts adoption

- Some basic questions seem missing from the community discourse:
  - What is the market seeking?
  - How is Drupal competitive?
  - Where is Drupal behind?

Drupal is not really looked at as a Product

Product Positioning

Ambitious Digital Experience

- What differentiates ambitious versus non-ambitious?
- Does ambitious imply complex?
- Does ambitious suggest investment?
- Is the market more niche?
- Considerations tied to **extensibility** and **lack of opinionation**
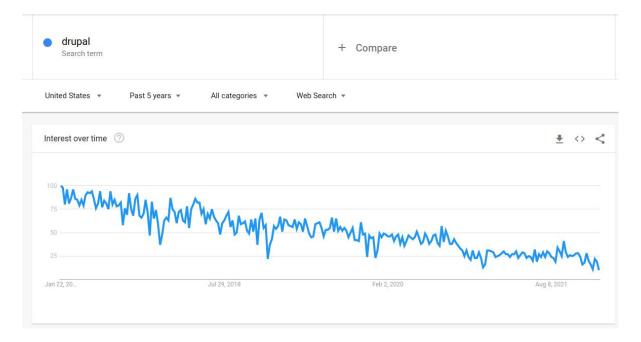
Key Logos

Adopters of Drupal

Spans many verticals

Market Data - W3Techs Usage and Positioning

- Drupal is used by 2.0% of known CMS and 1.3% of all websites
- 59% D7, 22% D8, 15% D9, and 4% older
- **Less adoption** than competitors
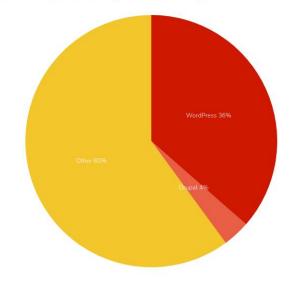- Positioned for **high traffic sites**

Drupal Market Position, 19 Jan 2022, W3Techs.com

Market Data - Google Trends

Market Data - BuiltWith

Top In CMS Usage Distribution in the Top 1 Million Sites

Technology	Websites	%
WordPress	364,510	36.45
Drupal	34,991	3.5
Plesk	28,493	2.85
WP Engine	27,984	2.8
Google Search Appliance	27,959	2.8
My Salesforce	26,866	2.69
CPanel	22,827	2.28
Joomla!	18,103	1.81
Atlassian Cloud	17,853	1.79
HubSpot CMS Hub	16,585	1.66
Unbounce	13,002	1.3

CMS Usage Distribution in the Top 1 Million Sites

Distribution for websites using CMS technologies

WordPress 36%

Other 60%

Drupal 4%

Drupal Product Summary

- Strong in enterprise and PaaS markets
- Adoption and market buzz is trending down
- Strong positioning in a niche market ("high traffic" which likely means enterprise)
- Potential confusion on market positioning and identity ("ambitious")
- Heavy adoption in older, end-of-life Drupal version is a risk
- Lack of opinionation and broad extensibility may stagger time-to-value or require adopters to perform configuration/development

SECTION 4

Field Analysis

WordPress and Drupal are often compared

WordPress Profile

Closest Drupal Competitor

- Open source, PHP-based CMS framework

- Has traditional CMS features out-of-the-box and add-ons for headless and commerce

- Large community ecosystem and contributed tools

- Has similar addressable market as Drupal

- Significantly more adoption than Drupal

64.9% and rising

WordPress share of CMS market as of June 2021

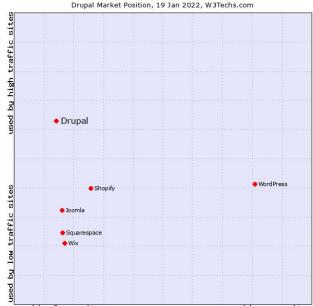Source: https://www.tooltester.com/en/blog/cms-market-share/

Market Data - W3Techs Usage and Positioning

DRUPAL

- Drupal is used by 2.0% of known CMS and 1.3% of all websites
- **Less adoption** than competitors
- Positioned for **high traffic sites**

WORDPRESS

- WordPress is used by 65.3% of known CMS and 43.4% of all websites
- **More adoption** than competitors
- Positioned for **low traffic sites**

Drupal Market Position, 19 Jan 2022, W3Techs.com

- used by high traffic sites
- used by low traffic sites
- Drupal
- Shopify
- WordPress
- Joomla
- Squarespace
- Wix
- used by fewer sites
- used by many sites

Market Data - BuiltWith

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CMS Usage Distribution in the Top 1 Million Sites

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COURT OF PUBLIC OPINION

What are people saying?

Drupal
Field Criteria

Trends for strengths and weaknesses

- **Accessibility**
- **Multi-lingual**
- **Usability**
- SEO
- **Theming**
- **Security**
- **Content Modeling**
- APIs/web services
- 3rd Party Integrations
- Vibrance
- Documentation
- Workflows
- Analytics
- **Performance**

- **Extensibility**
- **Time-to-value**
- Out-of-the-box
- Access Control
- **Updates**
- EoL Policy
- Community
- Support channels
- Partners/Vendors
- **Learning curve**
- Migration
- **Regulatory**
- DevOps
- Authoring

Strength of Drupal

Explanation of strengths

- Drupal framework extensible and can scale to meet enterprise demands
  - 48,239 community projects (modules)
  - Modern developer experience with broader Composer ecosystem of integrations

- Strong security posture
  - Drupal Security Team, security release policies, and update cadence

- Robust CMS out-of-the-box features
  - Multi-lingual, Migrate, Caching
  - Structured content: Content Types, Views, and Taxonomy for modeling

Weaknesses of Drupal

Explanation of weaknesses

- Steep learning curve - it's hard!
  - Often requires past experience or developer
  - Lack of non-technical paths to learn fast

- Drupal requires development and a lot of configuration
  - No opinionation requires configuration of need
  - Has so many features and lots of configuration, but hurts time-to-value
  - Distributions can address common use cases but requires code changes

- Lack of extensive theme market for low/no-code visual styling
  - Most Drupal applications require theming
  - Lack of out-of-the-box styling ability

WordPress Field Criteria

Trends for strengths and weaknesses

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- **Usability**
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- DevOps
- **Authoring**

Strength of WordPress

SWOT Analysis with evidence

- Focused on usability, not development
  - Faster time to value for common use cases
  - Opinionated out of the box configuration and features helps WordPress be more intuitive
  - Ability to install and update modules through the UI

- "Ready made" theming
  - No development experience needed
  - Configurable

- Discovery catalog of themes and features
  - Presented without technical jargon
  - Easy to install features

- Authoring experience
  - Gutenberg page editor aimed at usability

Weaknesses of WordPress

SWOT Analysis with evidence

- "Less secure" - unclear if this is true
  - Security team focuses on core only, contributed projects covered less
  - More adoption may make security issues more visible to people
  - Greater adoption from non-technical audience could suggest WordPress updates are less valued or not maintained (down-market, 70% sites as of 2019)

- Less out of the box than Drupal, requires plugins for additional features
  - Some plugins are paid, some free

- Performance and SEO requires deeper expertise

Future Drupal Opportunities

Empower non-developer persona

Usability Initiative

Drupal opportunity

Lower the barrier of entry to use Drupal

- Onboarding initiative with focus how Drupal can be leveraged without existing knowledge

- Improved documentation, free training, and onboarding for new adopters

- Usability study of Drupal itself tied to more inline help and targeted improvements

- Automated paths from sandbox (SimplyTest) to hosting and/or paid consultation

Value-Based Marketing

Drupal opportunity

Drupal needs to better promote its story

- Perform a market study on which features deliver the most value

- Create compelling videos and collateral that promotes Drupal's most compelling capabilities

- Clear and frictionless call-to-actions that enable people to start their Drupal journey

Be more competitive in Small and Medium market

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Automatic Updates

Drupal opportunity

Drupal should natively have a way to update without developer intervention

- Beyond "automatic updates" initiative

- Improved out-of-the-box update tooling

- Opinionated and automated DevOps tools

- Automated backup, restoration, and error reporting

- Awareness of VCS and configuration management

Vetted Top-20% Extensions

Drupal opportunity

Invest in top 20% of contributed modules to ensure the experience is great

- If people use them, others will want them

- Resolve all critical issues

- Add documentation for common use cases

- Improve language of project page and documentation toward ease-of-use

Stronger out-of-the-box, faster time-to-value

Configurable Theme

Drupal opportunity

Deliver an out-of-the-box theme that can be readily configured to style 80% of a website without development

- Settings to control logo, colors, fonts, and sizing through the UI

- Clean integration with other out of the box Drupal features like Views, Layout Builder, and Media support

Turnkey Headless and Commerce

Drupal opportunity

Imagine *Umami* but for additional use cases

- Position Drupal as a readily available solution for emerging CMS markets

- Avoid added Drupal overhead of Distribution management

- Focus on experience of getting Drupal set up to meet most common Headless and Commerce features as fast as possible

- Documentation and configuration quickstarts

DrupalCon 2022

Shift toward Ambitious Site Builder is an acknowledgement of addressing less technical market

Examples: **Project Browser** and **Starter Template** initiatives

Thank you!

Sources

All sources were added as annotations in the slides or the slide notes. Additional ones were added to this slide for reference.