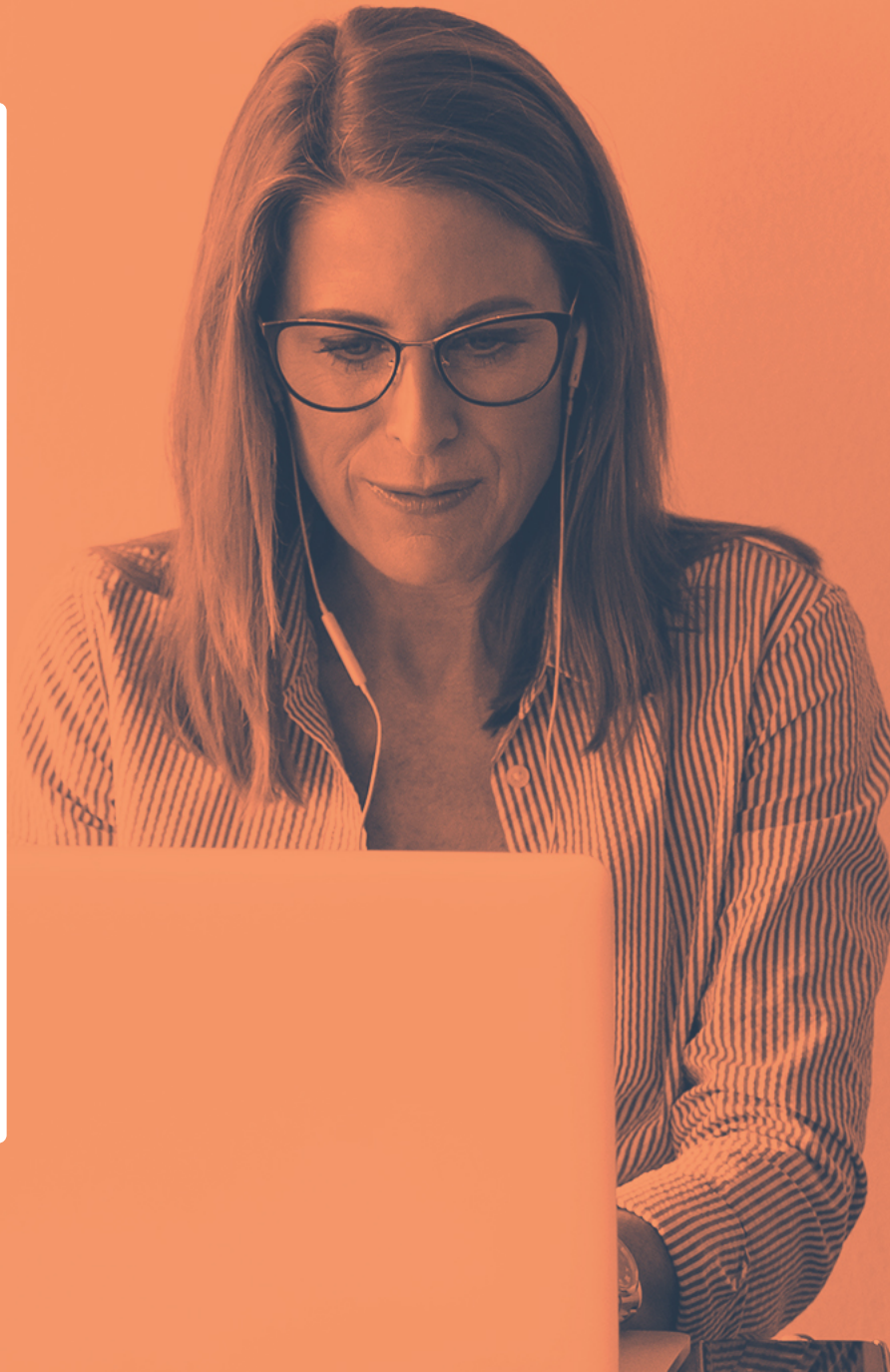


HubSpot Research

State of Inbound 2018

Global Report



The State of Inbound 2018

Welcome to HubSpot's comprehensive resource on the current state of inbound marketing and sales strategy and operations. This year's edition is clear, concise, and designed to be your go-to resource for strategic data.

The world is becoming more inbound. HubSpot's goal is to provide the benchmarks and insights to help businesses everywhere

Grow Better.

What's inside

1. The State of Marketing
2. The State of Sales
3. Sales and Marketing Alignment
4. Reaching buyers
5. Trend Data
6. Who we surveyed

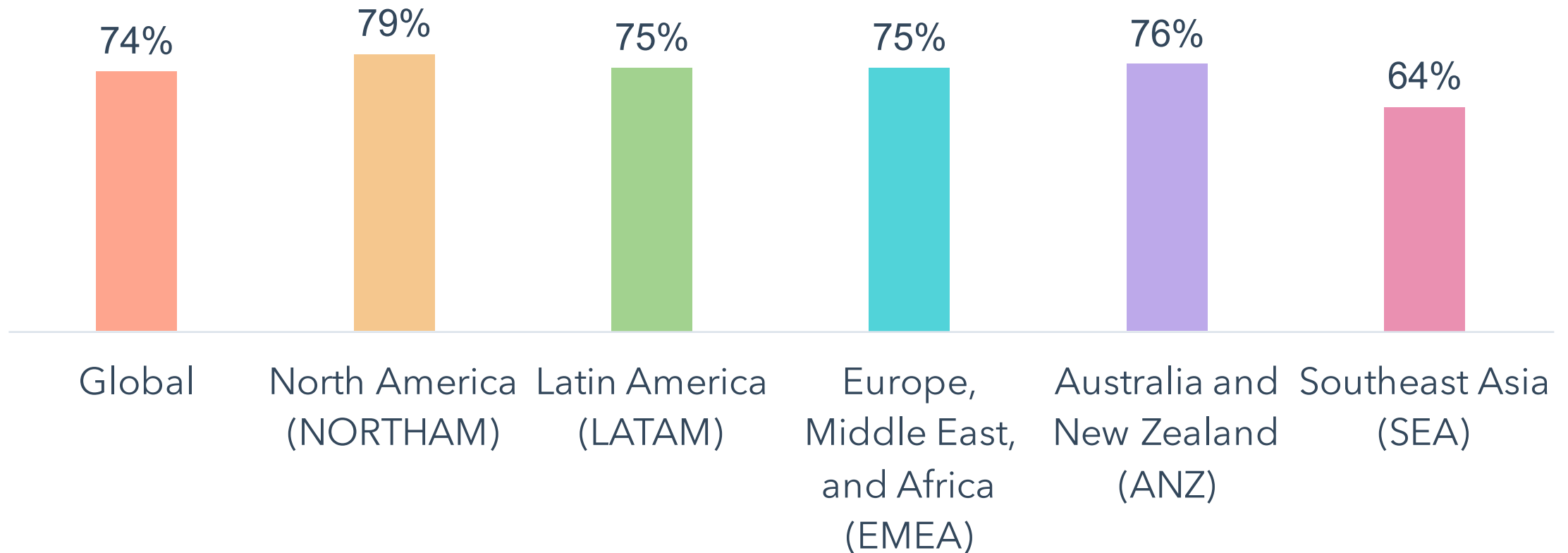
The State of Marketing

Inbound marketing is the primary marketing approach for the majority of businesses worldwide. Our respondents are confident in their marketing strategy and see higher ROI as a result of their inbound marketing practices.

Marketers today are investing more in video channels, social networks such as Instagram, and messaging applications such as Facebook Messenger, in a bid to reach customers and prospects where they prefer to be online.

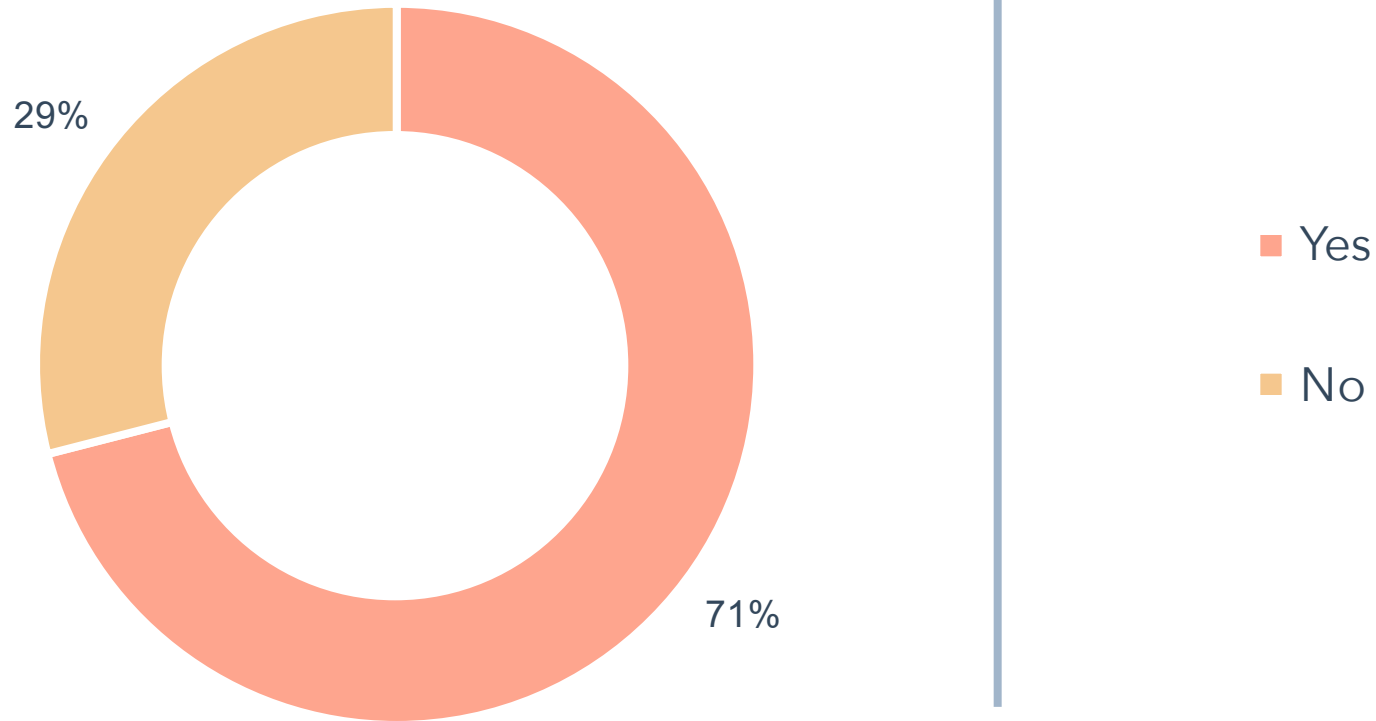
Inbound is a global methodology

What is your organization's primary approach to marketing?
"We primarily conduct inbound marketing"



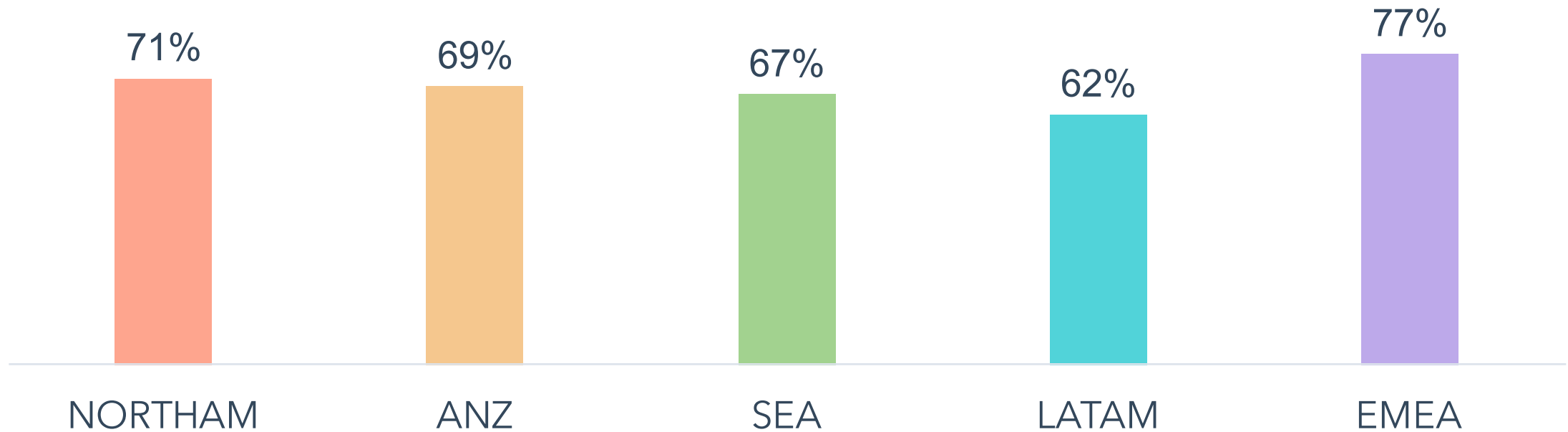
71% of marketers believe in their marketing strategy

Do you feel that your organization's marketing strategy is effective?



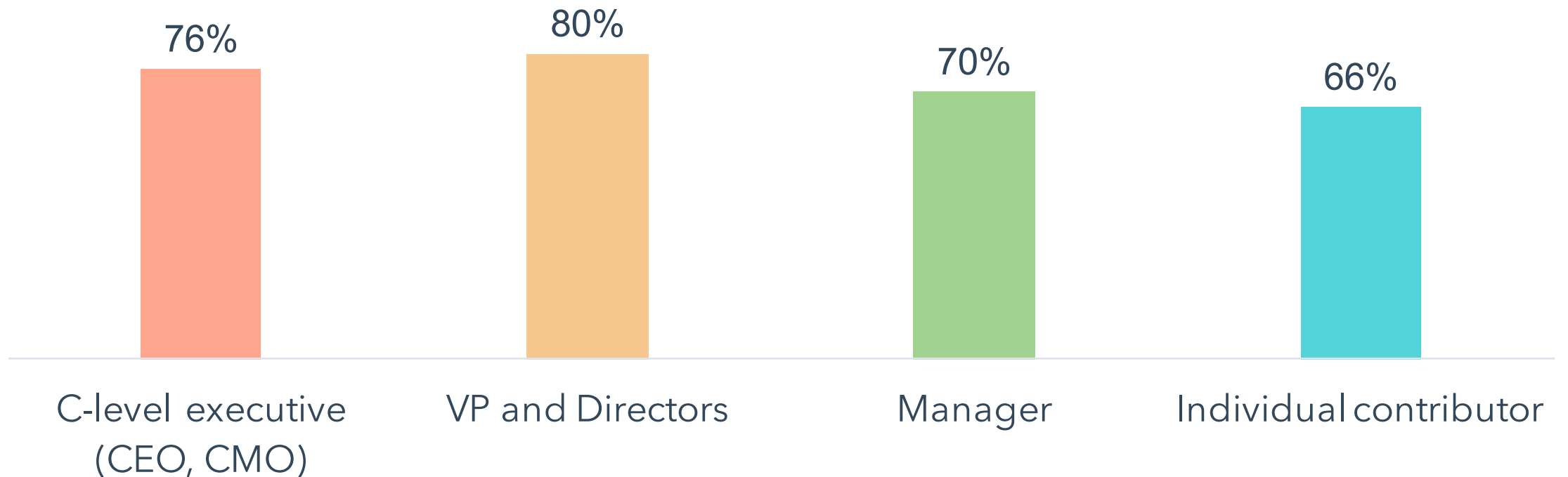
Marketers in EMEA (Europe, Middle East, and Africa) are most confident in their strategy

“Our organization's marketing strategy is effective”
(by Region)



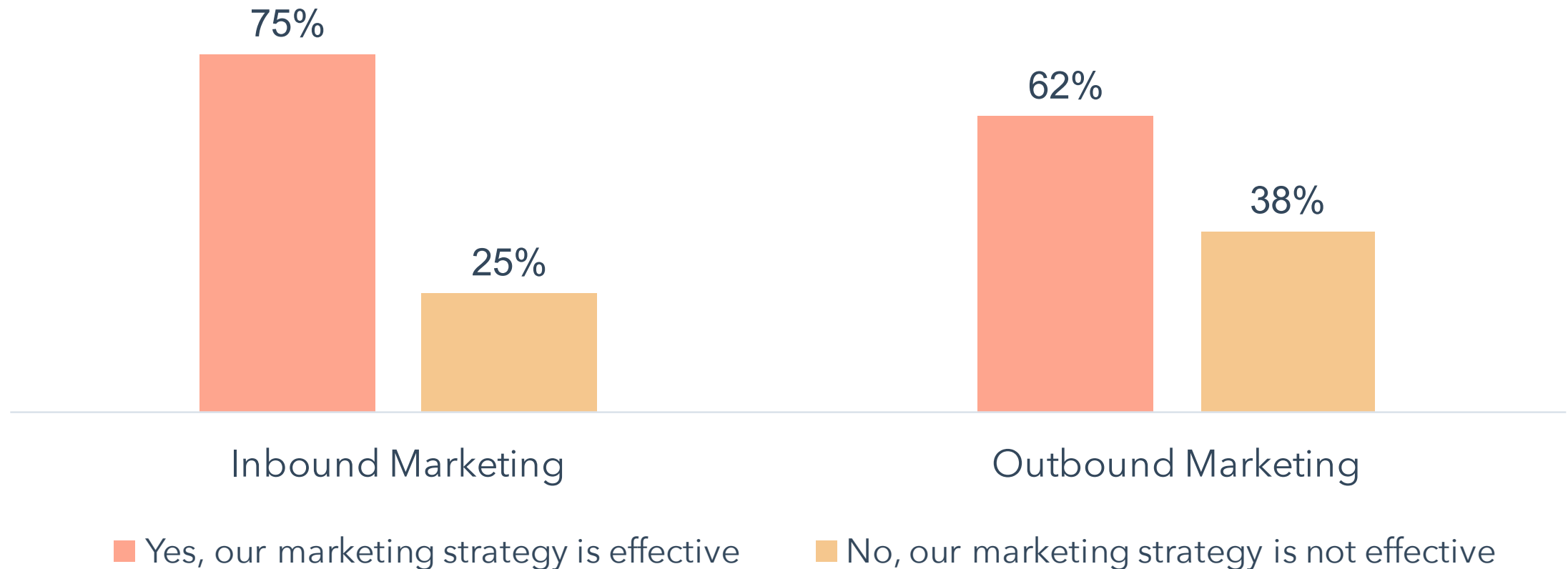
While junior marketers have less faith in the strategy set out by managers

“Our organization's marketing strategy is effective”
(by Title)



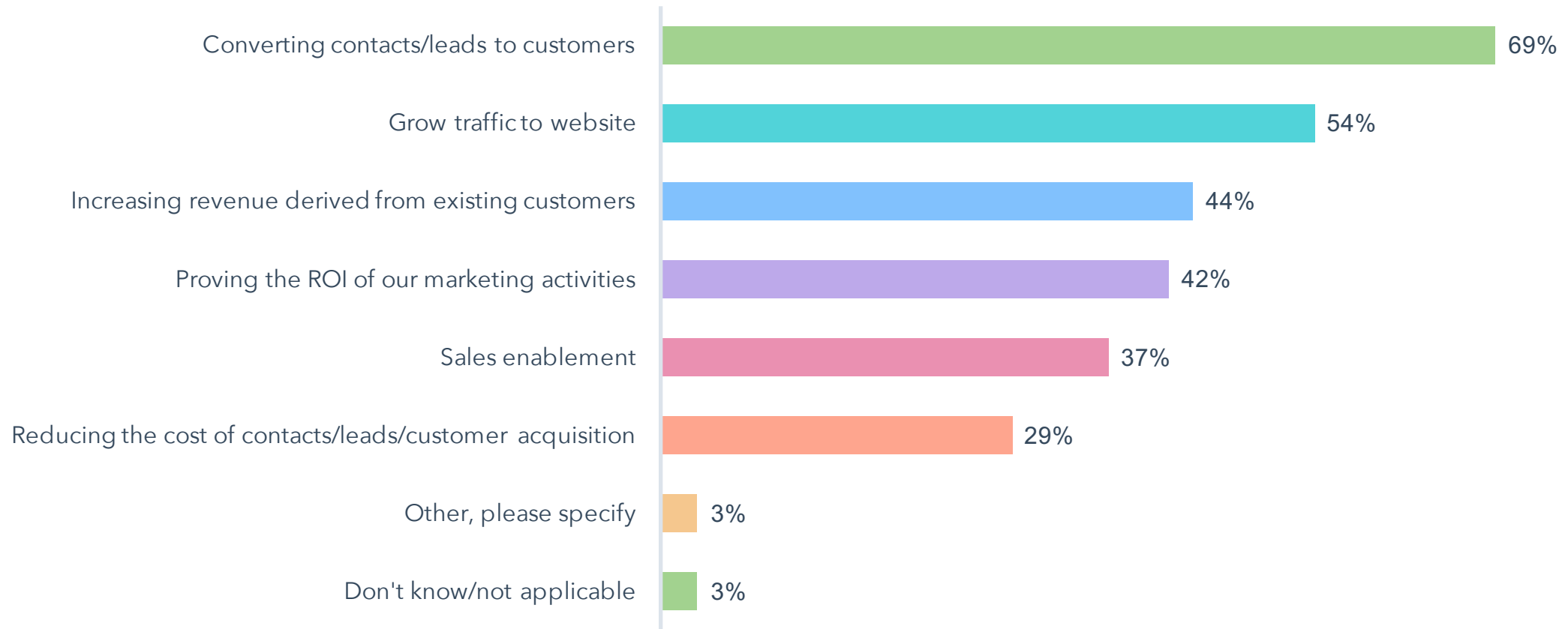
Inbound teams are more likely to rate their marketing strategy as effective

Do you feel that your organization's marketing strategy is effective? by What is your organization's primary approach to marketing?



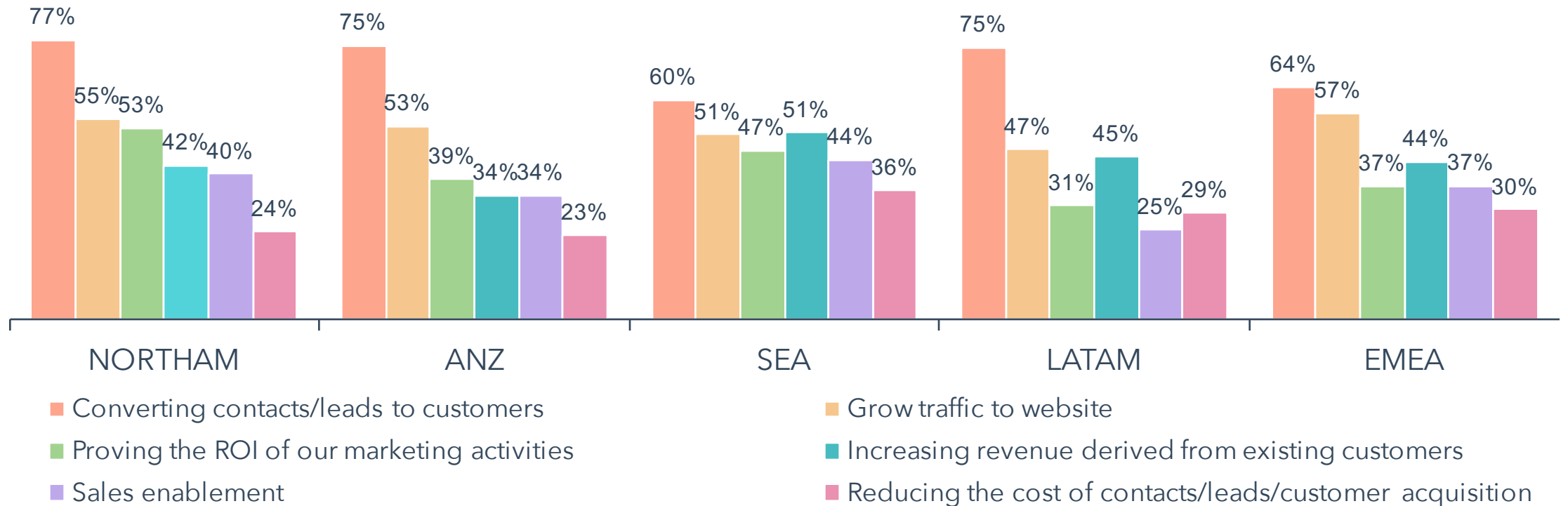
Marketers prioritize converting leads into customers - BOFU content is crucial

What are your company's top marketing priorities over the next 12 months?



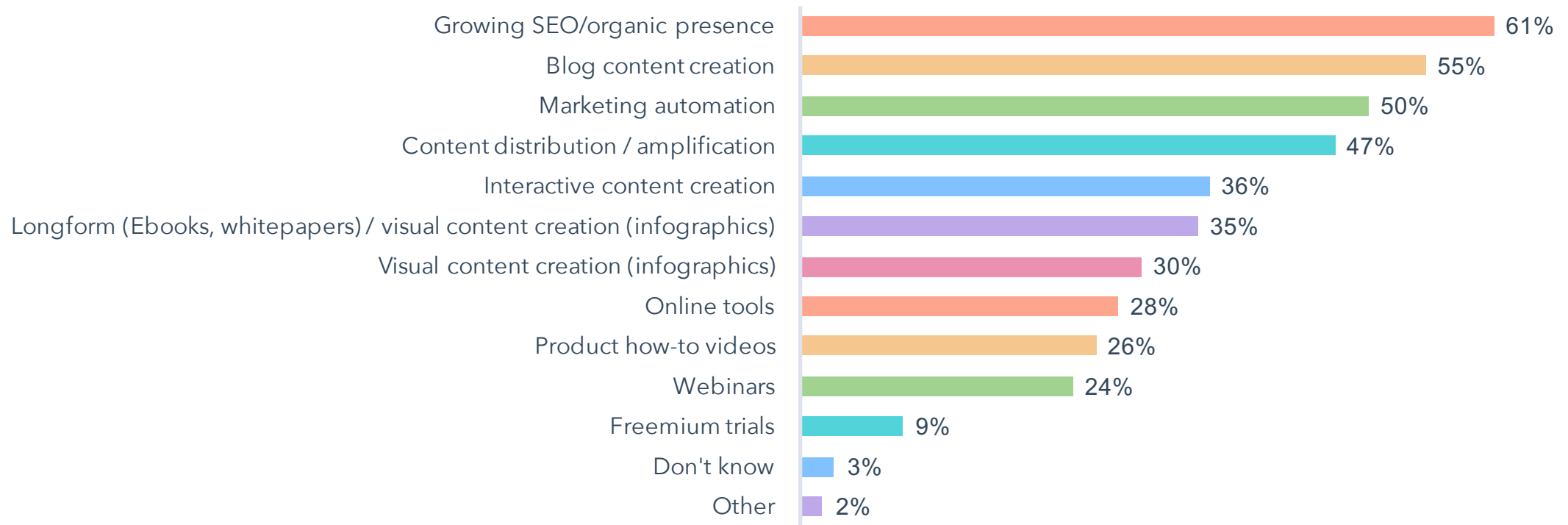
Marketing priorities around the world

What are your company's top marketing priorities over the next 12 months?
(by Region)



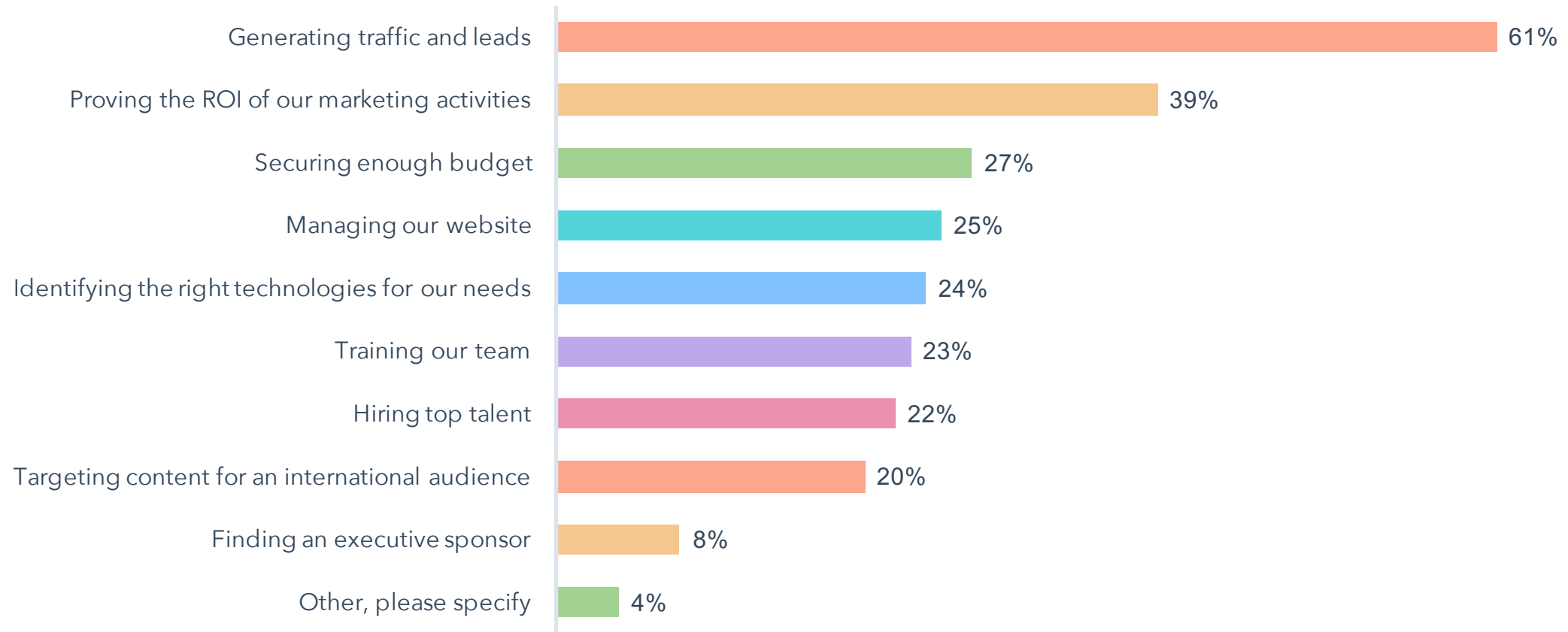
Inbound marketing goals include SEO, content creation, and automation

Thinking specifically about inbound marketing projects, what are your company's top priorities?



Generating traffic is a constant challenge

What are your company's top marketing challenges?

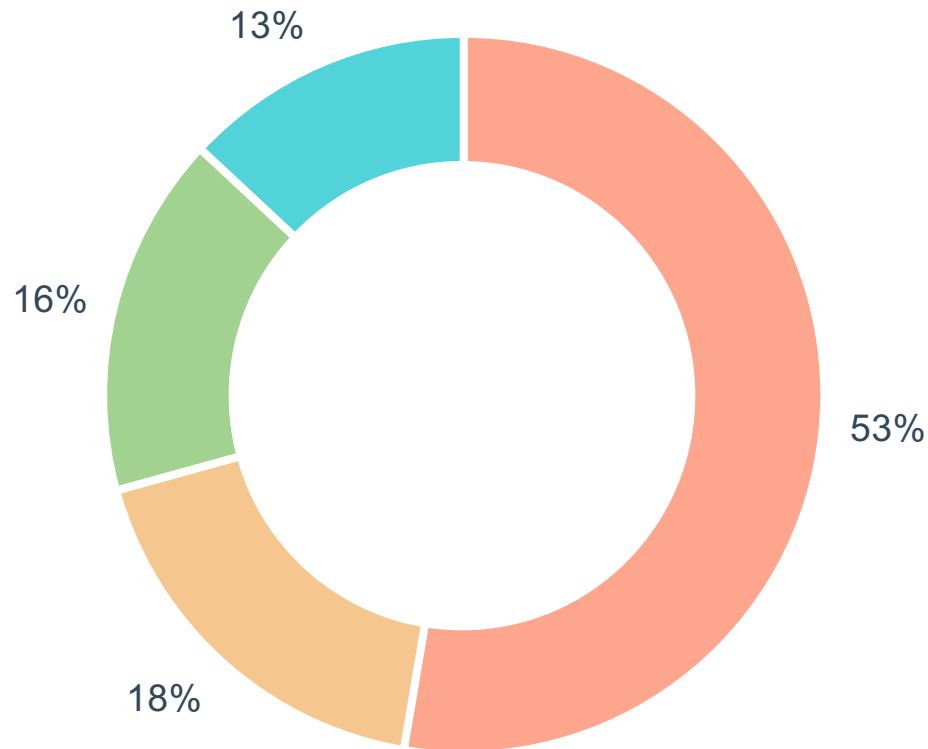


Top 5 marketing challenges in each region

Rank	NORTHAM	ANZ	SEA	LATAM	EMEA
1	Generating traffic and leads 62%	Generating traffic and leads 63%	Generating traffic and leads 59%	Generating traffic and leads 66%	Generating traffic and leads 62%
2	Proving the ROI of our marketing activities 46%	Proving the ROI of our marketing activities 40%	Proving the ROI of our marketing activities 39%	Proving the ROI of our marketing activities 37%	Proving the ROI of our marketing activities 40%
3	Securing enough budget 25%	Securing enough budget 25%	Targeting content for an international audience 37%	Identifying the right technologies for our needs 32%	Managing our website 27%
4	Managing our website 24%	Managing our website 19%	Securing enough budget 29%	Securing enough budget 29%	Securing enough budget 25%
5	Identifying the right technologies for our needs 19%	Identifying the right technologies for our needs 18%	Identifying the right technologies for our needs 26%	Managing our website 28%	Targeting content for an international audience 23%

Marketers see higher ROI from inbound marketing tactics

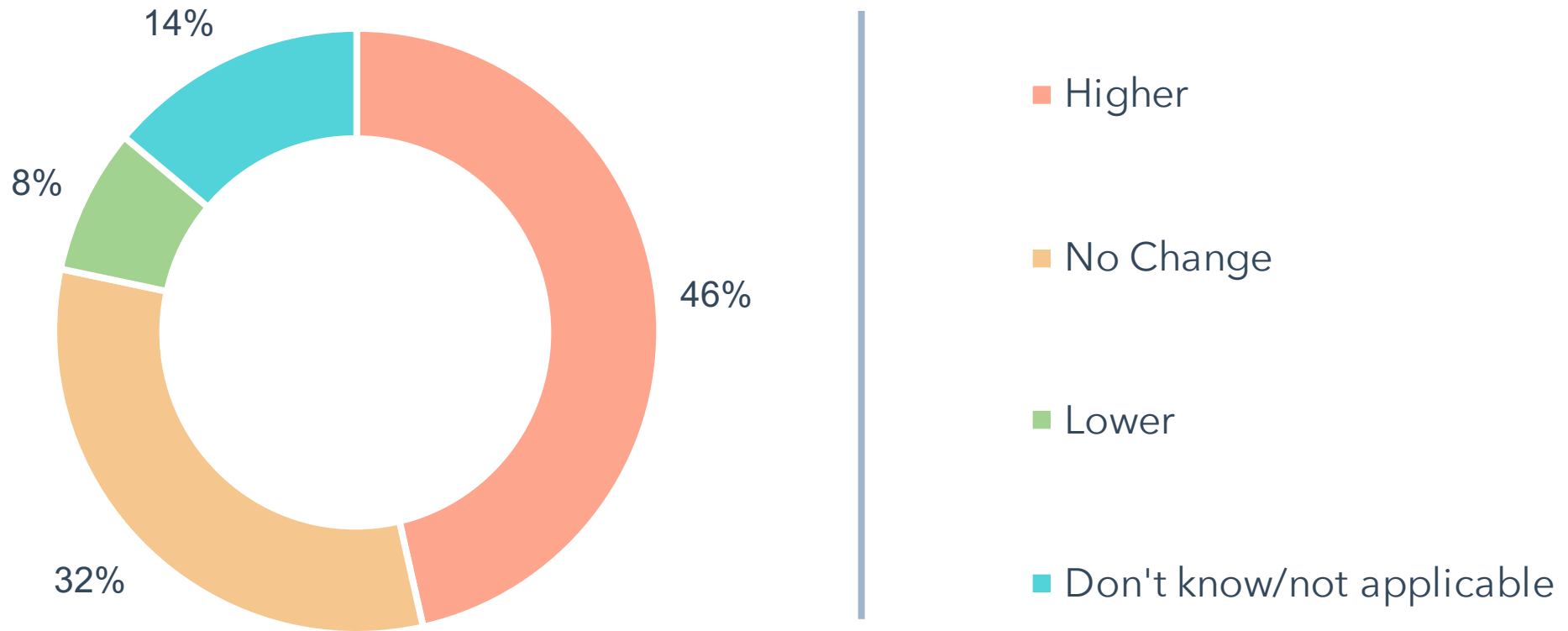
Which marketing approach has given your organization higher ROI: inbound marketing or outbound marketing?



- Inbound marketing gives us higher ROI
- Could not or do not calculate ROI
- Outbound marketing gives us higher ROI
- Don't know/not applicable

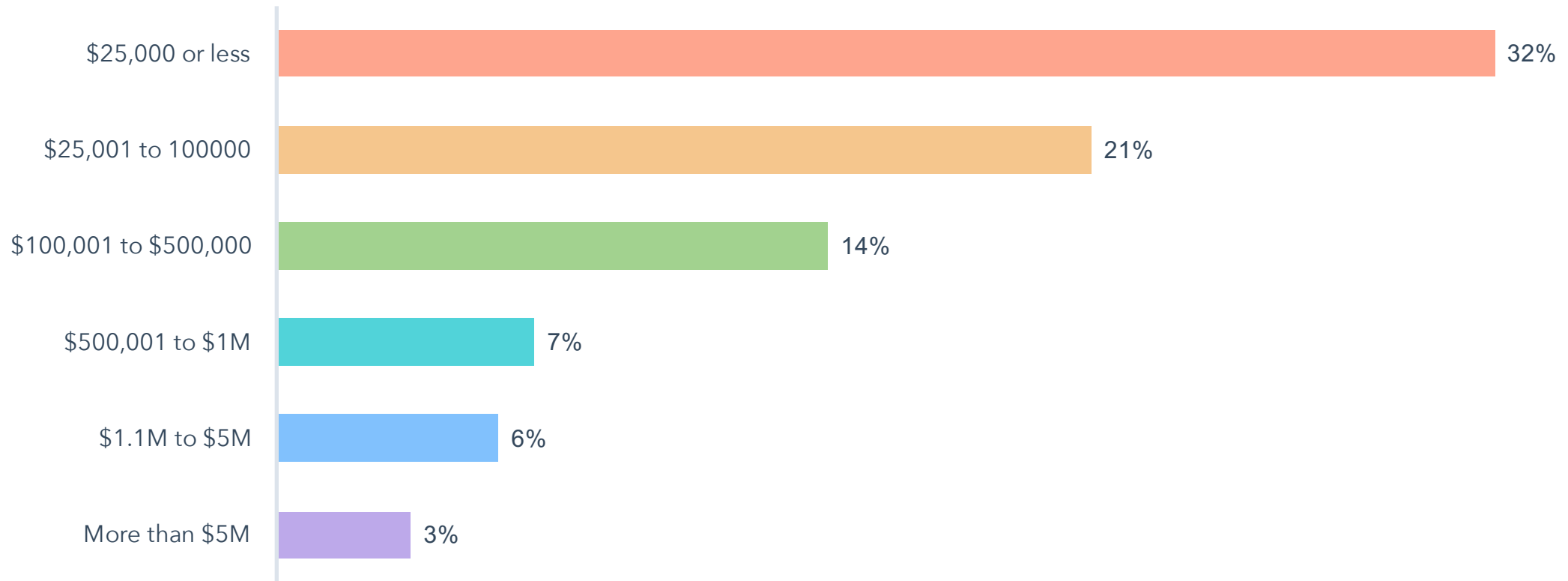
46% of teams have higher budgets in 2018

How does your company's current budget for inbound marketing compare to last year's?



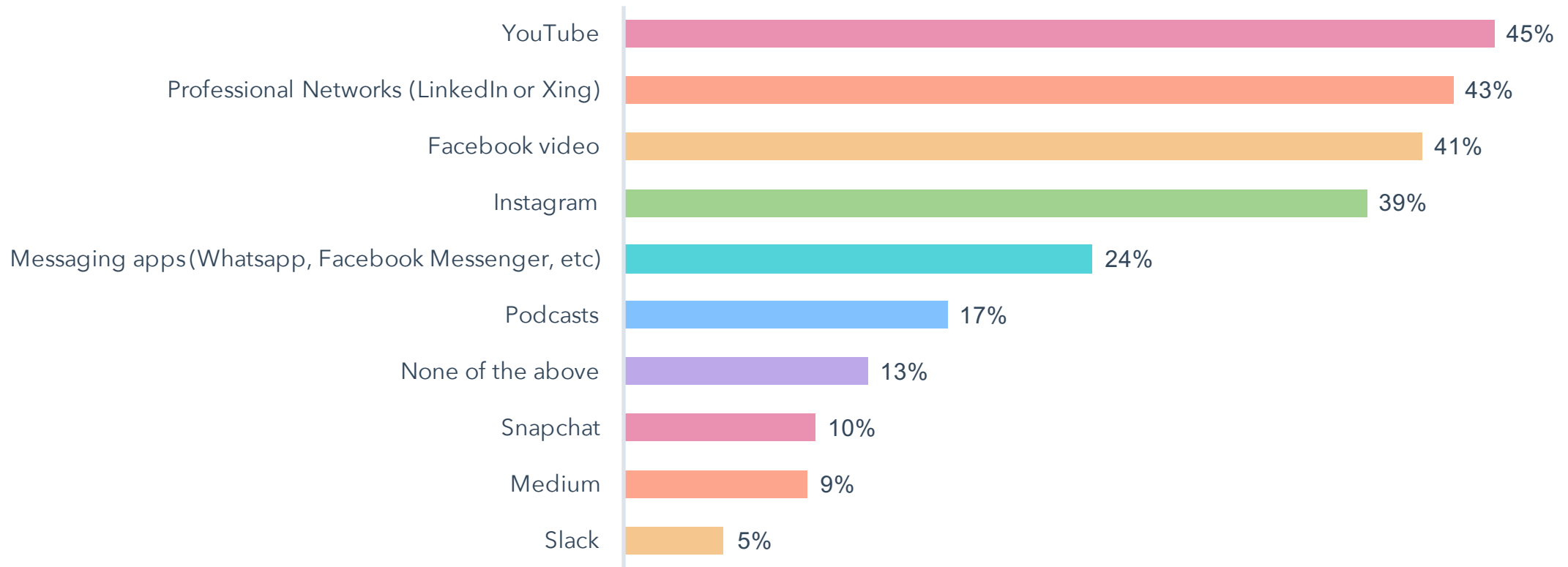
Marketing spend distribution

How much will your company spend on marketing over the next 12 months?
(Please do not include salary for staff)



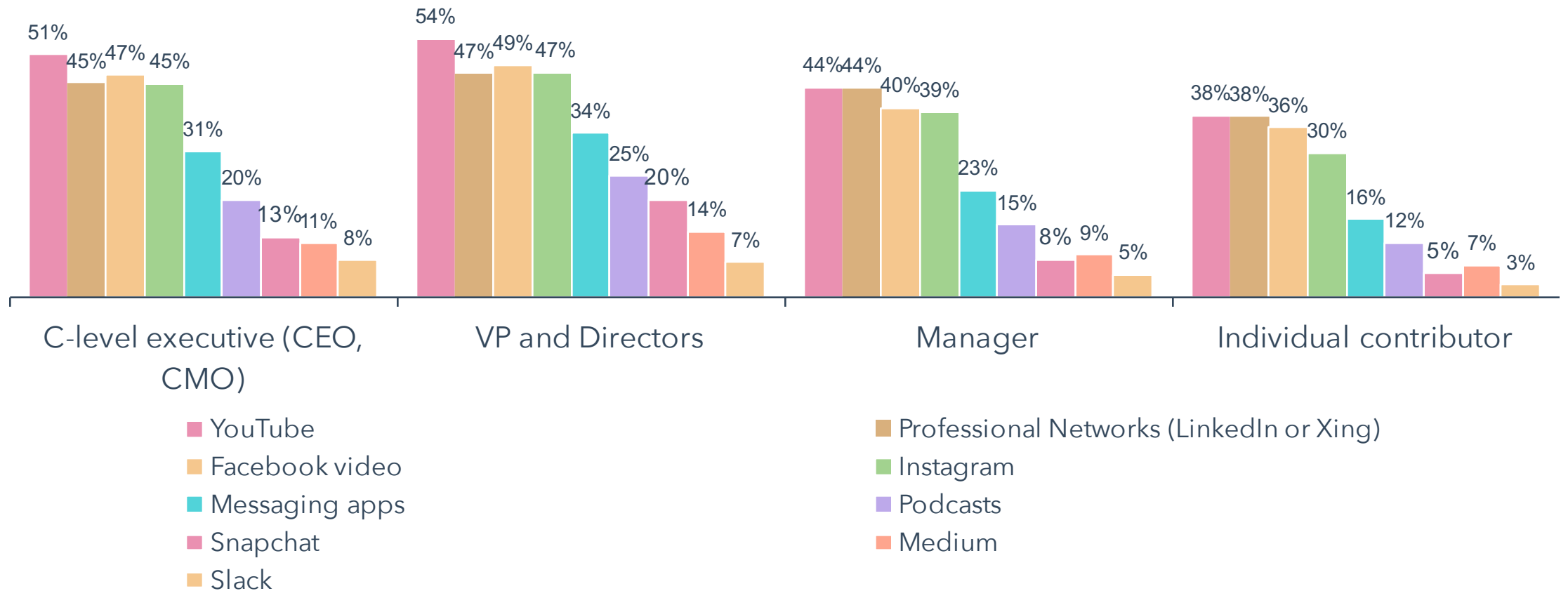
Marketing is investing in video channels

What content distribution channels do you plan to add to your marketing efforts in the next 12 months?



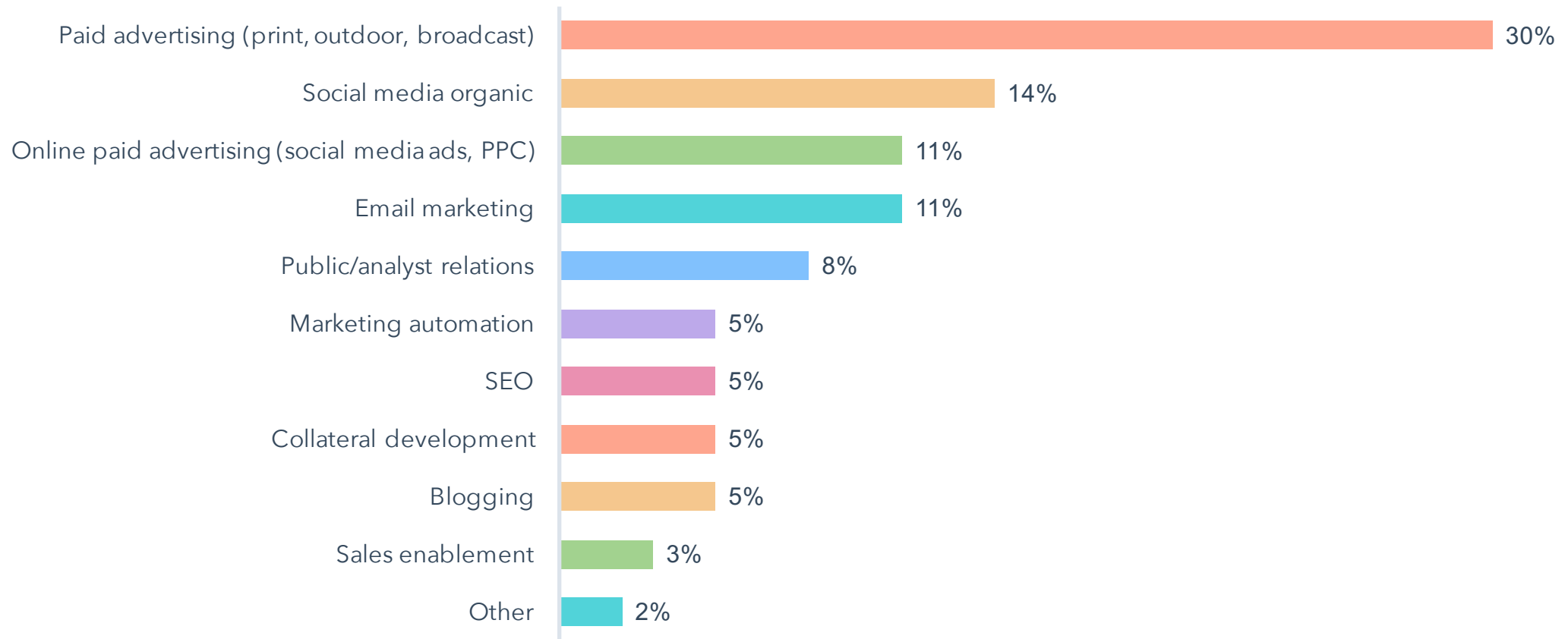
Senior marketing leaders are more enthusiastic about video

What content distribution channels do you plan to add to your marketing efforts in the next 12 months? (by Title)



Marketers rate paid advertising as overrated

In your opinion, what's the most overrated marketing tactic?



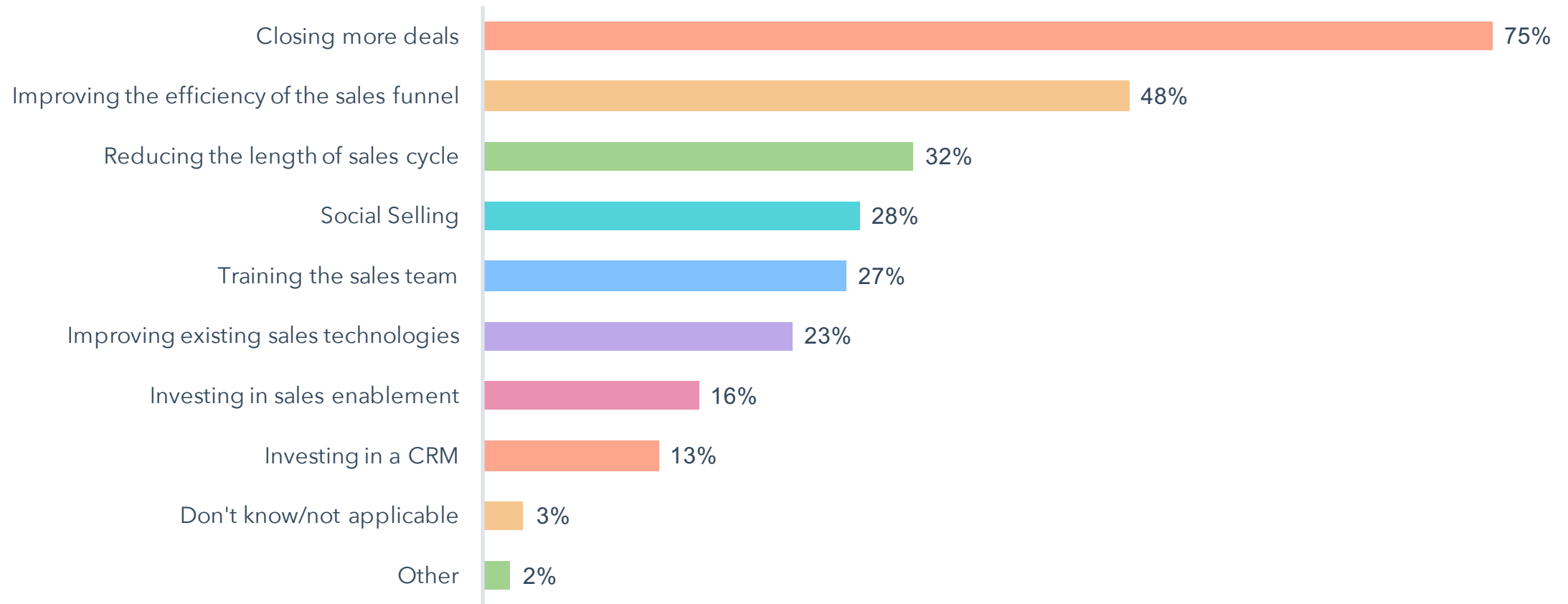
The State of Sales

Sales is always focused on closing more, but prospecting is getting harder and harder. Salespeople say they source the most leads themselves, showing a potential rift between marketing, who should generate the most leads for sales teams to work.

Additionally, 27% of salespeople are spending over an hour a day on data entry work instead of selling, meaning critical time is lost to administrative work.

Sales always wants to close deals, which requires making the funnel more efficient

What are your company's top sales priorities for the next year?



Top 5 sales priorities in each region

Rank	NORTHAM	ANZ	SEA	LATAM	EMEA
1	Closing more deals 85%	Closing more deals 76%	Closing more deals 76%	Closing more deals 70%	Closing more deals 70%
2	Improving the efficiency of the sales funnel 56%	Improving the efficiency of the sales funnel 59%	Improving the efficiency of the sales funnel 49%	Social Selling 40%	Improving the efficiency of the sales funnel 47%
3	Reducing the length of sales cycle 37%	Reducing the length of sales cycle 31%	Training the sales team 35%	Improving the efficiency of the sales funnel 39%	Reducing the length of sales cycle 33%
4	Training the sales team 22%	Social Selling 22%	Reducing the length of sales cycle 32%	Training the sales team 29%	Social Selling 28%
5	Improving existing sales technologies 21%	Training the sales team 19%	Social Selling 27%	Reducing the length of sales cycle 29%	Training the sales team 27%

Prospecting has gotten harder

What is more difficult to do in sales compared to 2 to 3 years ago?

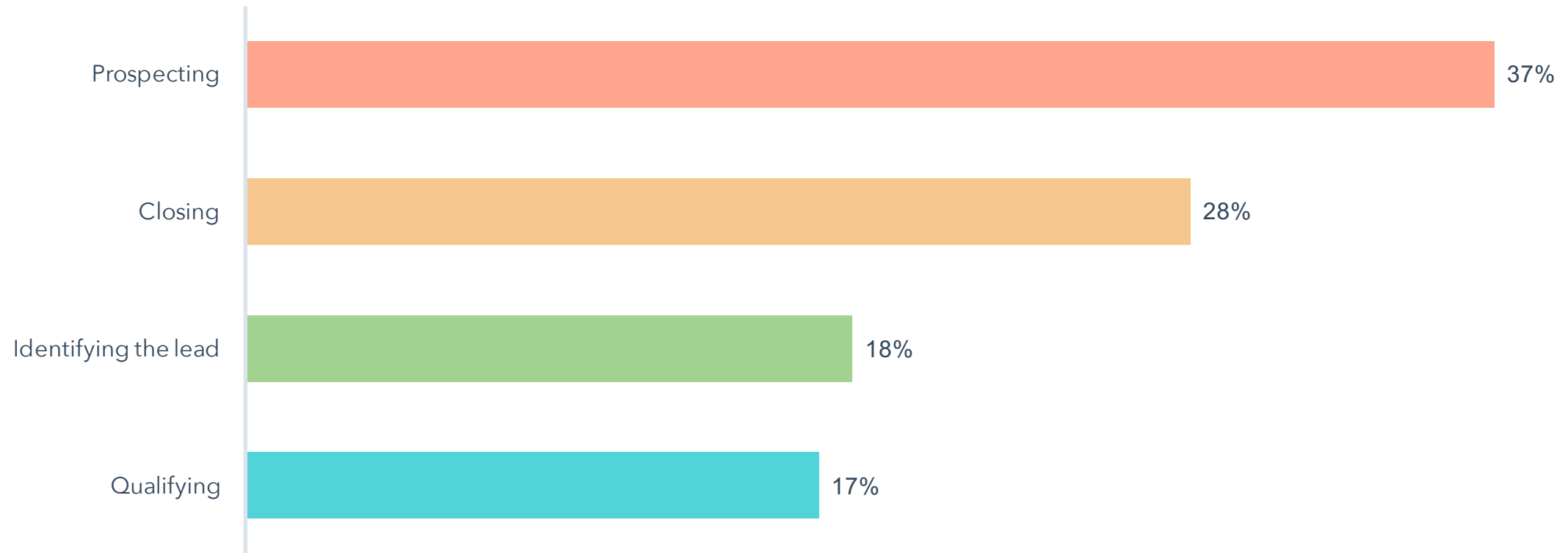


Top 5 sales challenges in each region

Rank	NORTHAM	ANZ	SEA	LATAM	EMEA
1	Getting a response from prospects 46%	Getting a response from prospects 43%	Getting a response from prospects 47%	Closing deals 36%	Getting a response from prospects 34%
2	Connecting via phone 42%	Connecting via phone 33%	Identifying/prospecting good leads 35%	Getting a response from prospects 36%	Closing deals 31%
3	Engaging multiple decision makers at a company in the buying process 28%	Engaging multiple decision makers at a company in the buying process 29%	Closing deals 34%	Engaging multiple decision makers at a company in the buying process 36%	Connecting via phone 29%
4	Identifying/prospecting good leads 25%	Closing deals 28%	Engaging multiple decision makers at a company in the buying process 33%	Identifying/prospecting good leads 31%	Engaging multiple decision makers at a company in the buying process 29%
5	Connecting via email 25%	Avoiding discounting/negotiation 25%	Avoiding discounting/negotiation 30%	Avoiding discounting/negotiation 25%	Identifying/prospecting good leads 25%

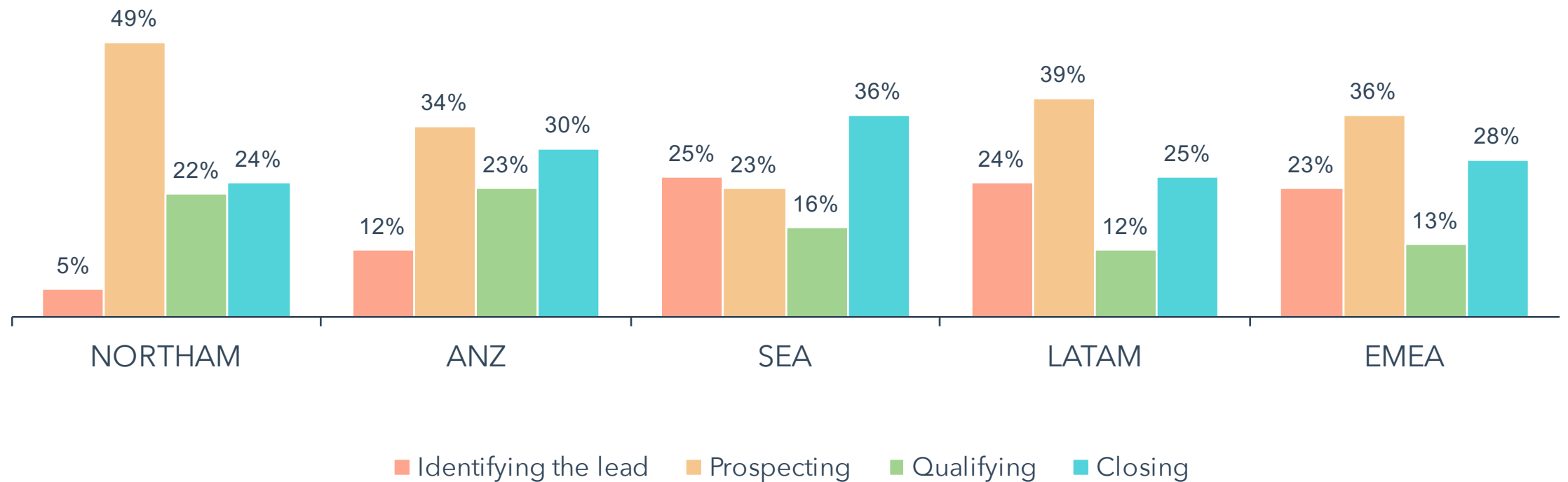
Presale activities stump 55% of salespeople today

In your opinion, what part of the sales process do reps struggle with most?



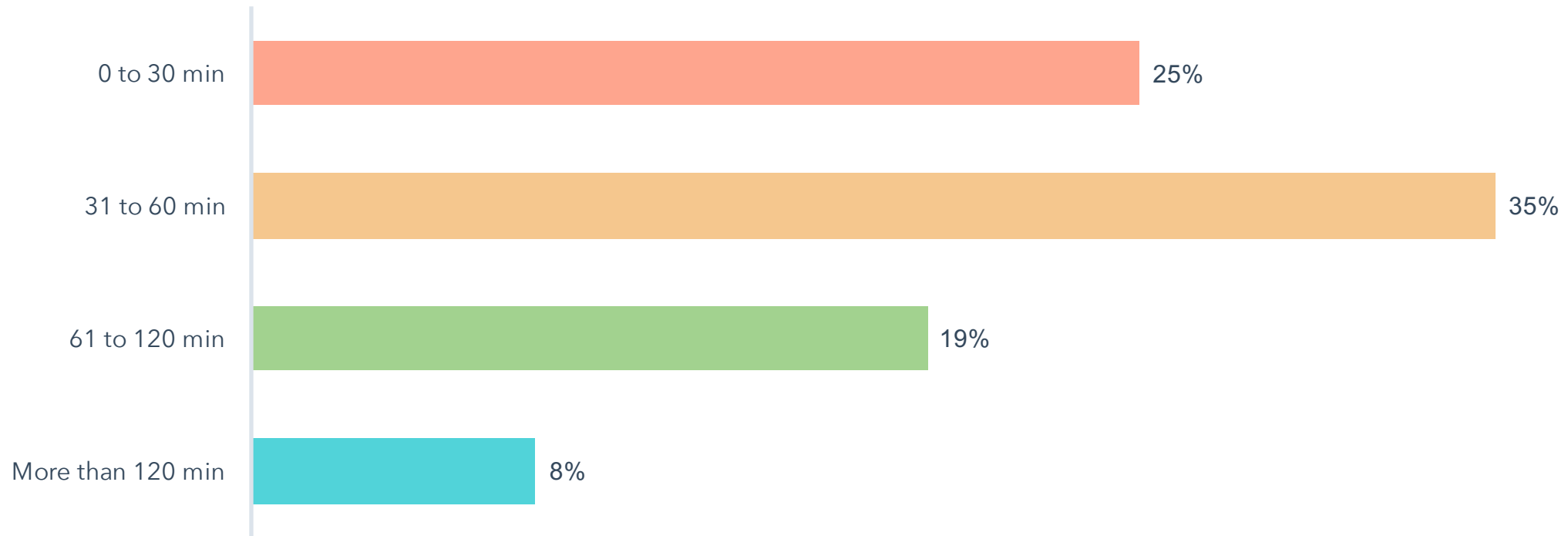
Salespeople in Southeast Asia struggle to close deals, prospecting is painful in North America

In your opinion, what part of the sales process do reps struggle with most?
(by Region)



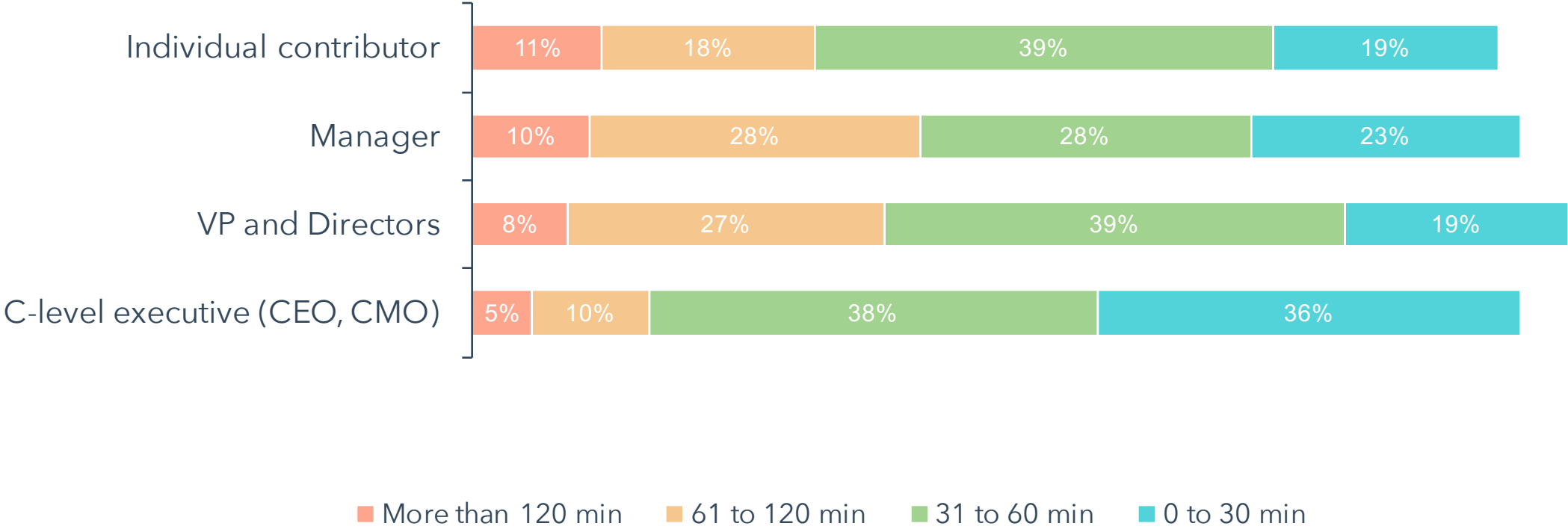
Many reps are spending their time on data entry instead of prospecting or selling

On average, how much time per day does your sales team spend performing data entry or other manual tasks?



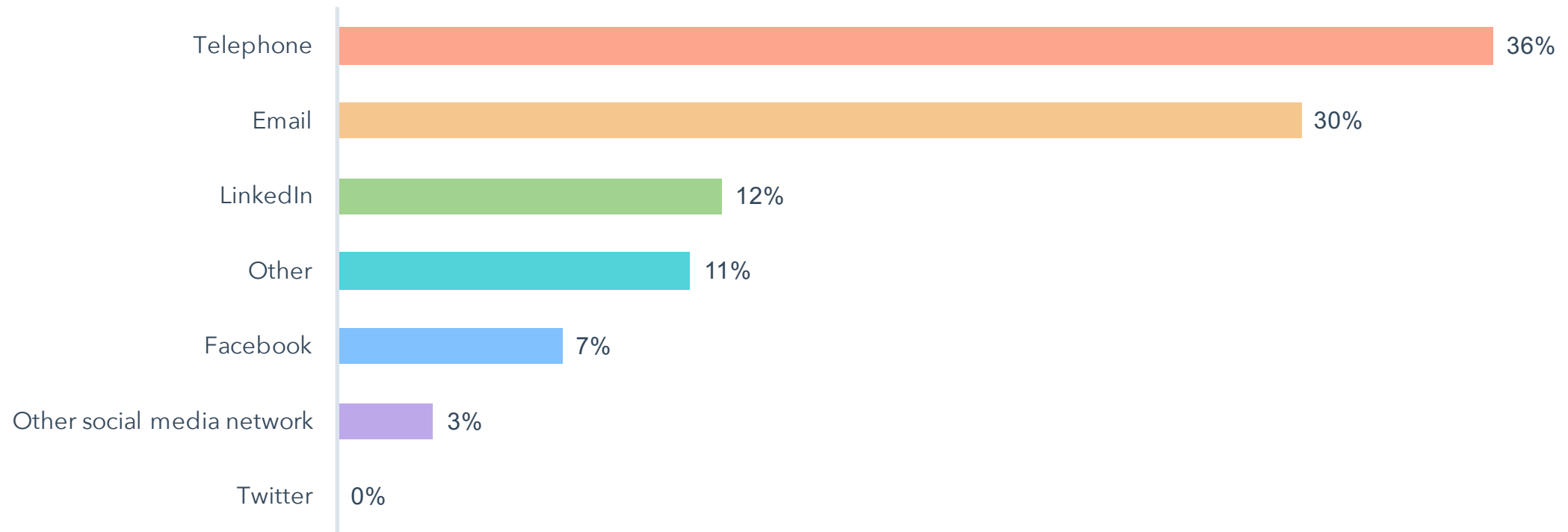
Senior leaders underestimate the the amount of time salespeople spend on data entry

On average, how much time per day does your sales team spend performing data entry or other manual tasks?



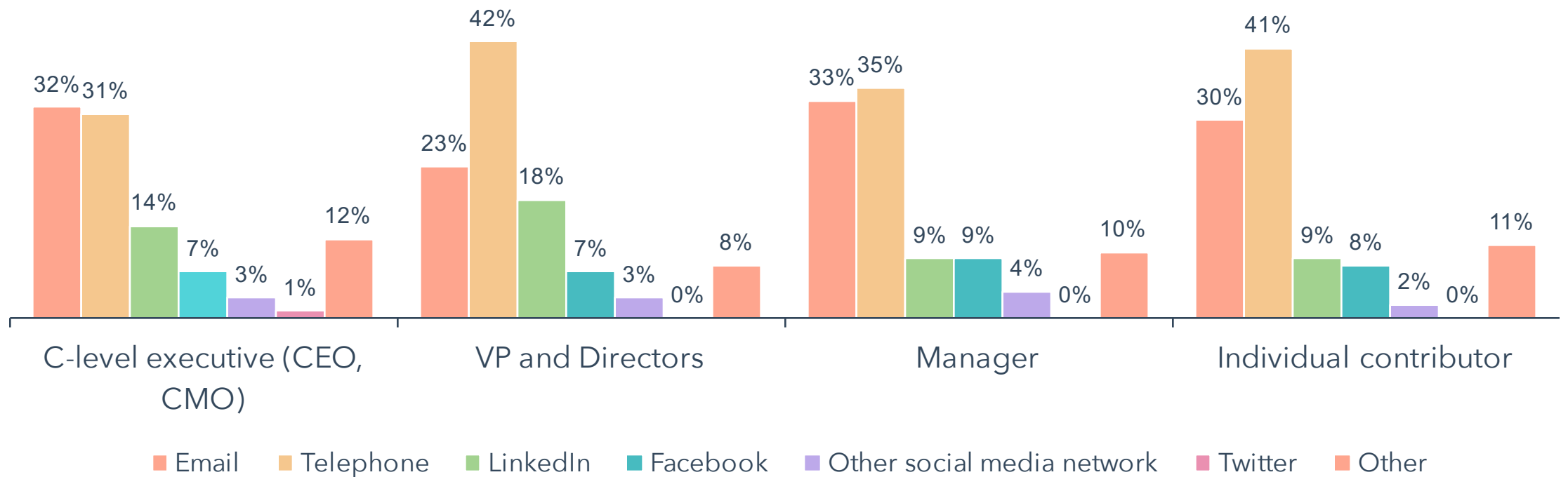
Phone and email are the best channels for sales, but GDPR may impact those in Europe

What has been the most successful channel for your sales representatives to connect with a prospect?



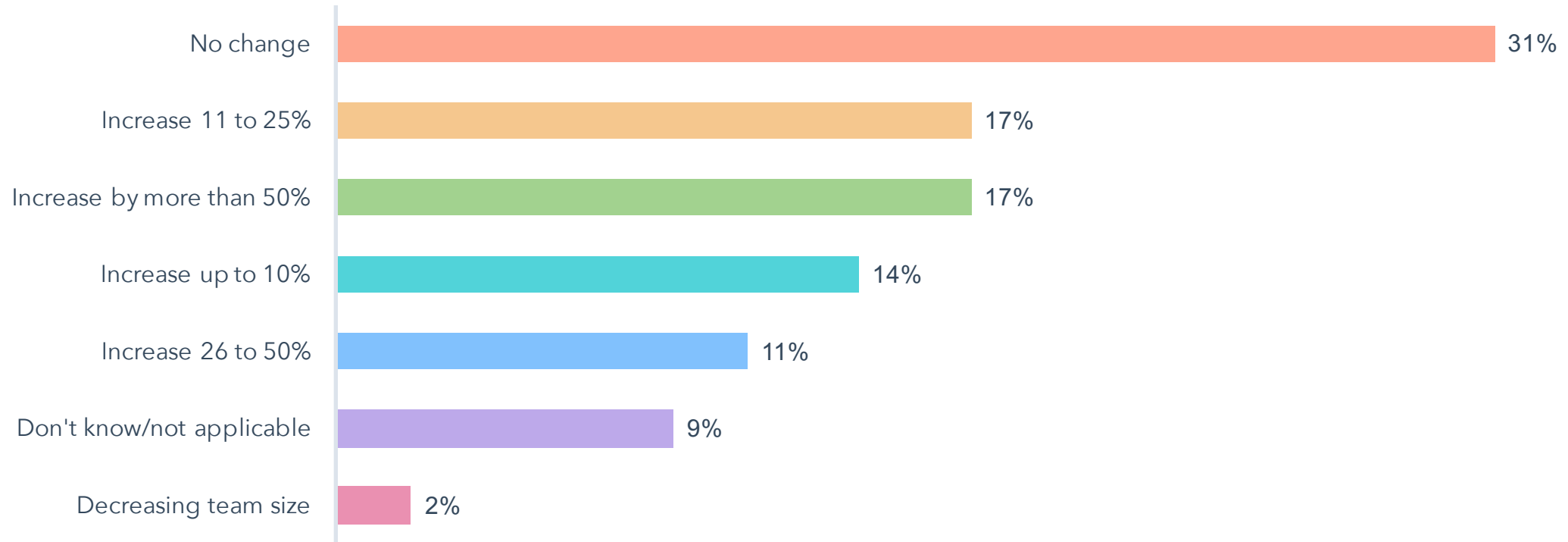
C-level respondents connect via email, but other roles rely on phone calls to prospect

What has been the most successful channel for your sales representatives to connect with a prospect? (by Title)



58% of sales teams are increasing in size

Is your company increasing or decreasing the size of the sales team over the next 12 months?



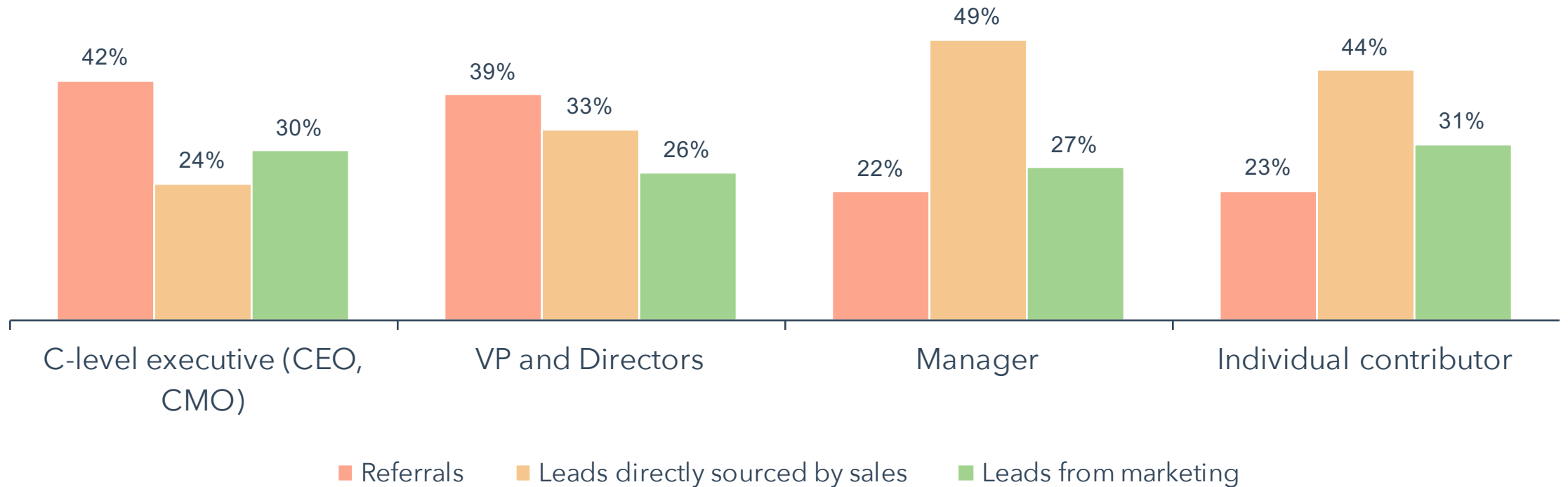
Salespeople say they source the most leads overall

Which is the top source of leads for your sales organization?



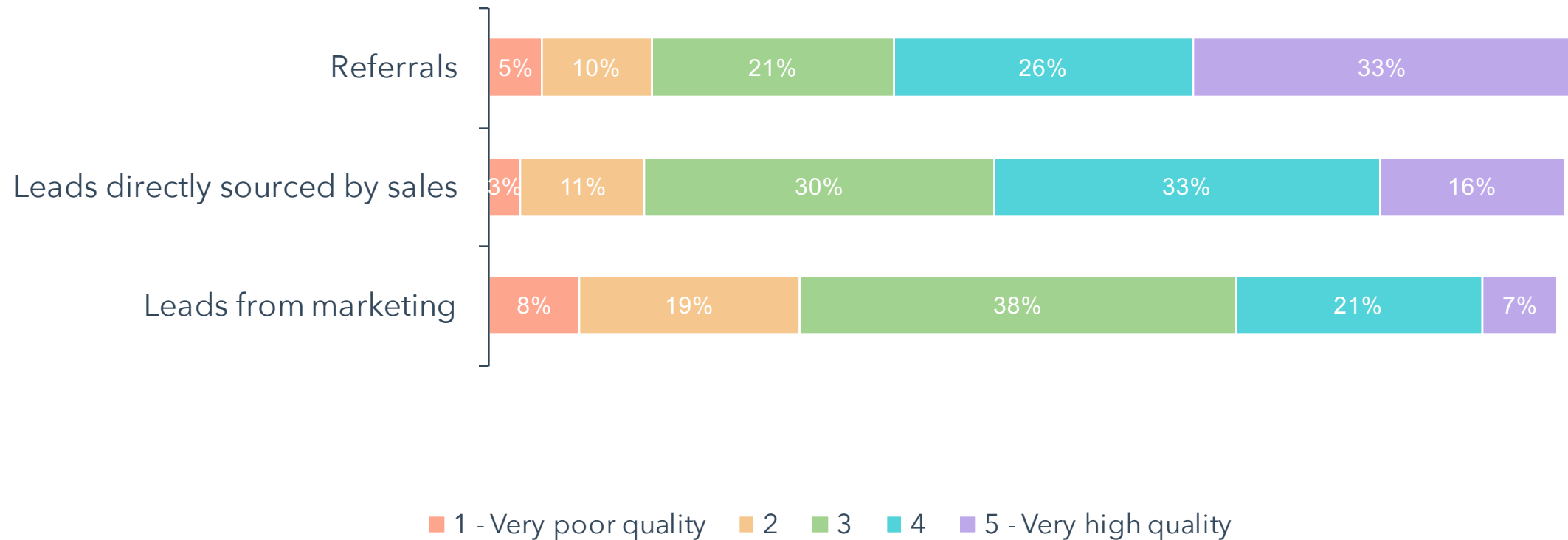
But senior leaders and ICs disagree on the top source of leads

Which is the top source of leads for your sales organization? (by Title)



On the whole, referrals are rated as the highest quality leads

Rate the quality of your leads from the following sources (1 to 5 scale)

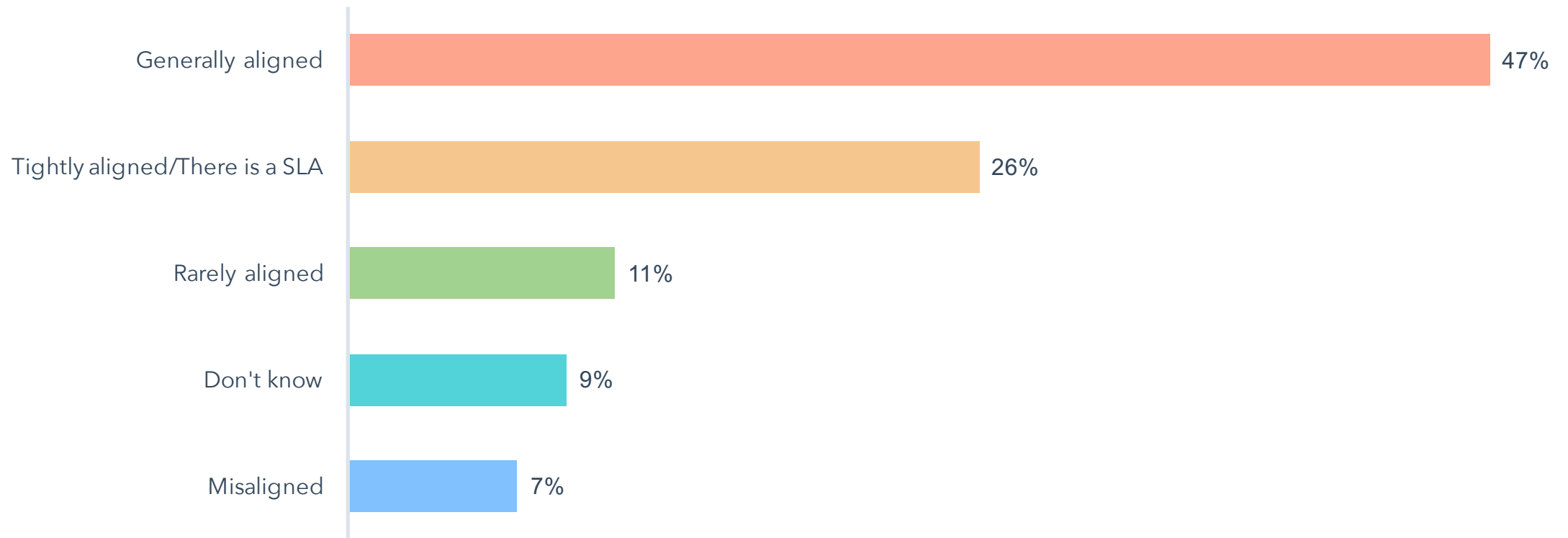


Sales and Marketing Alignment

Teams with SLAs between sales and marketing have better cooperation and performance. Marketing teams understand the impact of their strategy, and sales appreciates the leads they receive from marketing. Joint SLA efforts lead to growth.

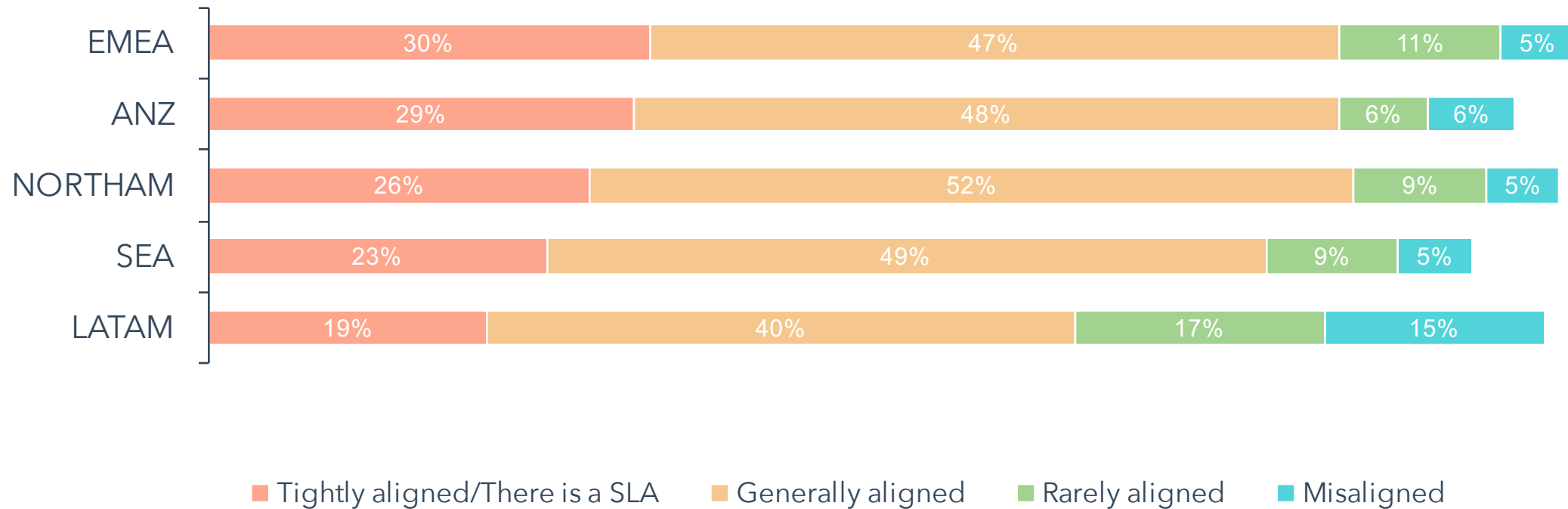
Just 26% of respondents operate under a marketing and sales SLA

How would you characterize your company's sales and marketing relationship?



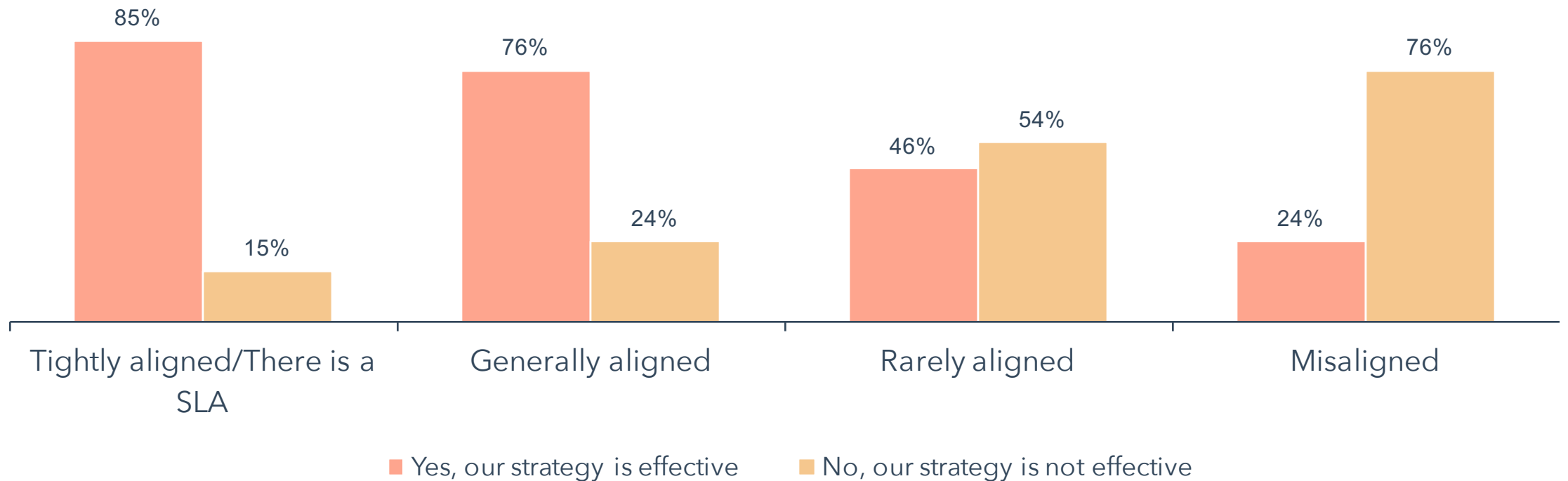
Teams in EMEA and ANZ have the most alignment

How would you characterize your company's sales and marketing relationship? (by Region)



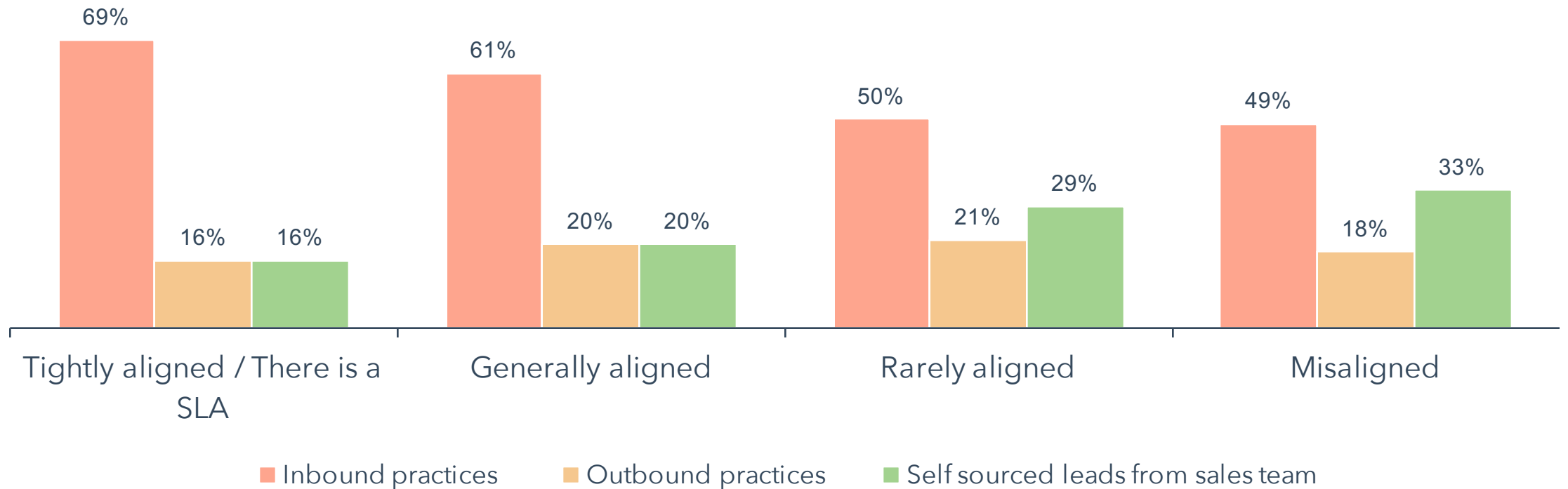
Marketers with SLAs have faith in their strategy

Do you feel that your organization's marketing strategy is effective?
(By the company's sales and marketing relationship)



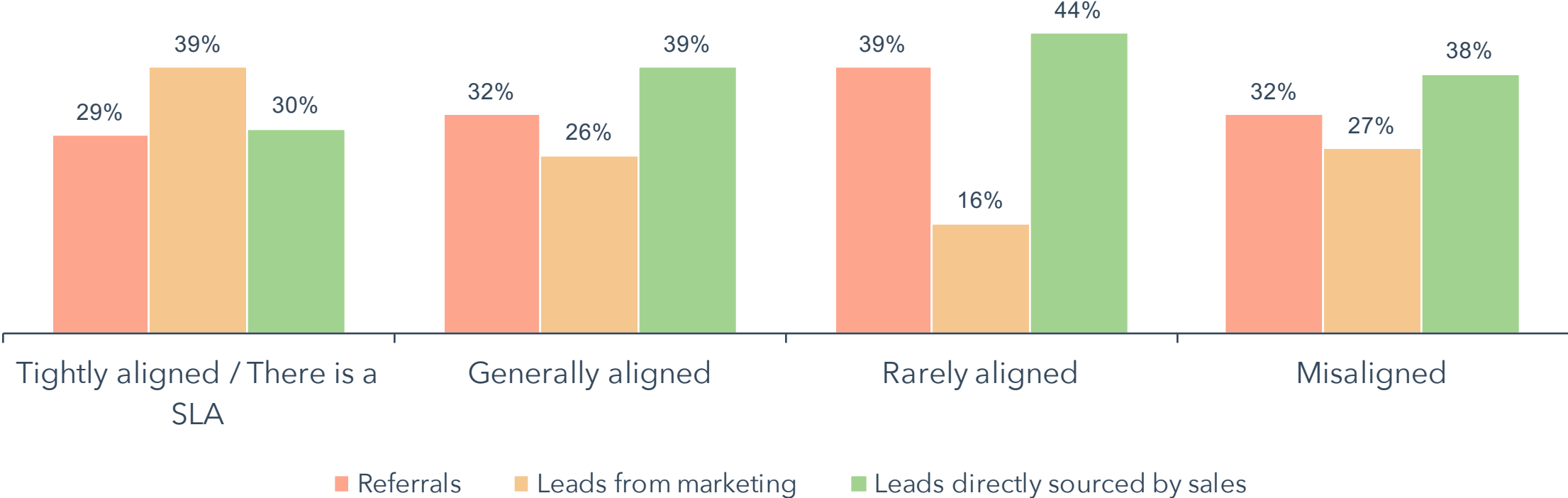
Marketers with SLAs say they provide high quality leads to sales

Which source provides the highest-quality leads for your sales team?
(By the company's sales and marketing relationship)



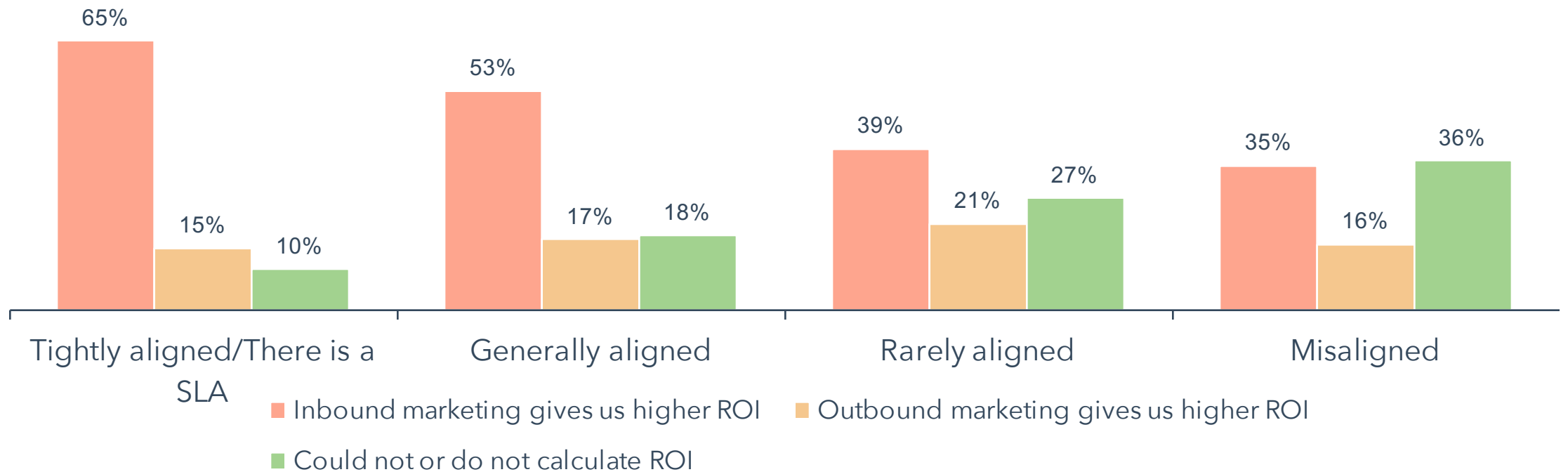
Salespeople with SLAs call out marketing as the top generator of leads

Which is the top source of leads for your sales organization?
(By the company's sales and marketing relationship)



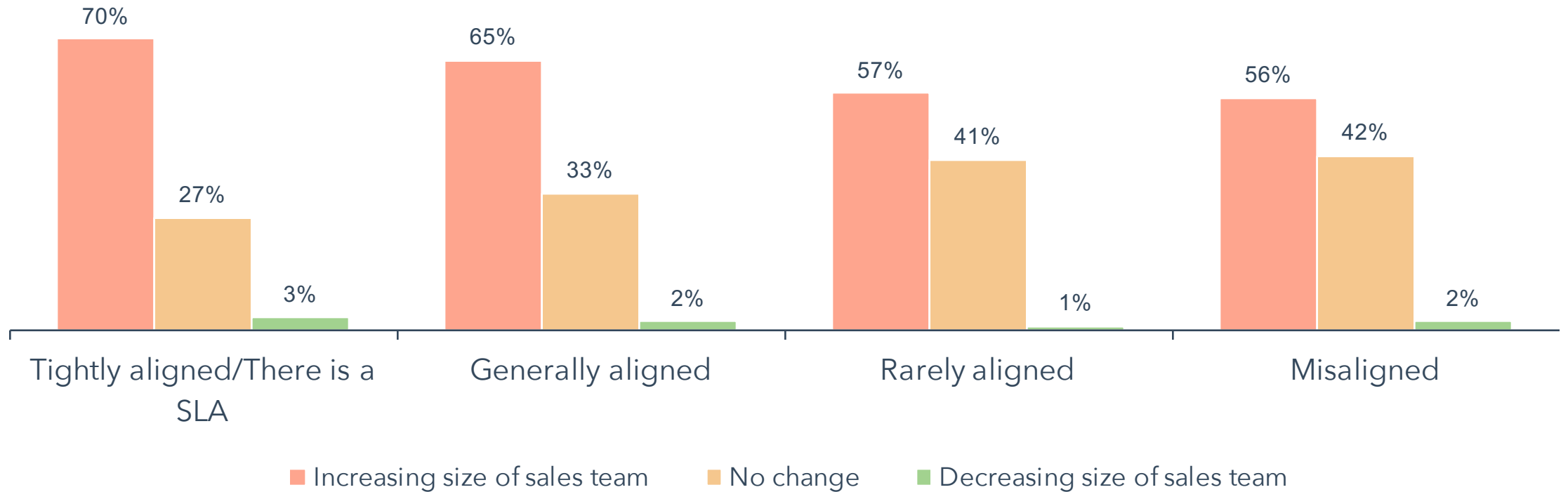
Teams with SLAs see higher ROI from inbound marketing

In your opinion, which marketing approach has given your organization higher ROI? (By the company's sales and marketing relationship)



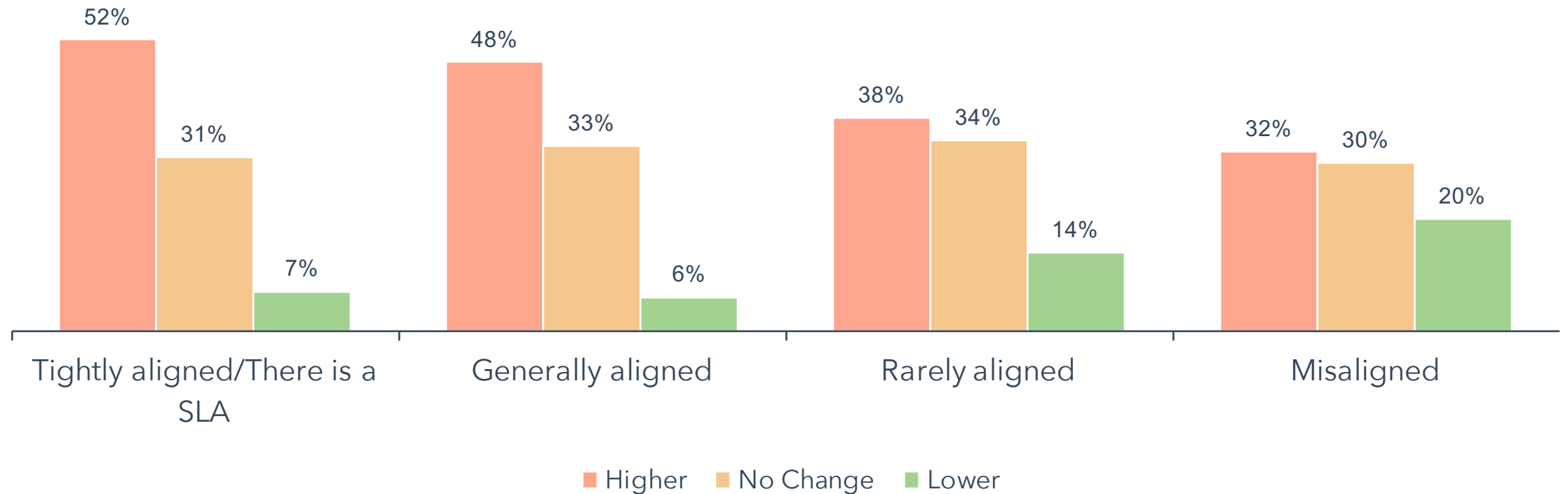
SLAs means growth: Sales teams more likely to grow when there's an SLA

Is your sales team increasing or decreasing size next year? (By the company's sales and marketing relationship)



SLAs means growth: Marketing teams with SLAs are more likely to get increased budgets

How does your company's current budget for inbound marketing compare to last year's? (By the company's sales and marketing relationship)



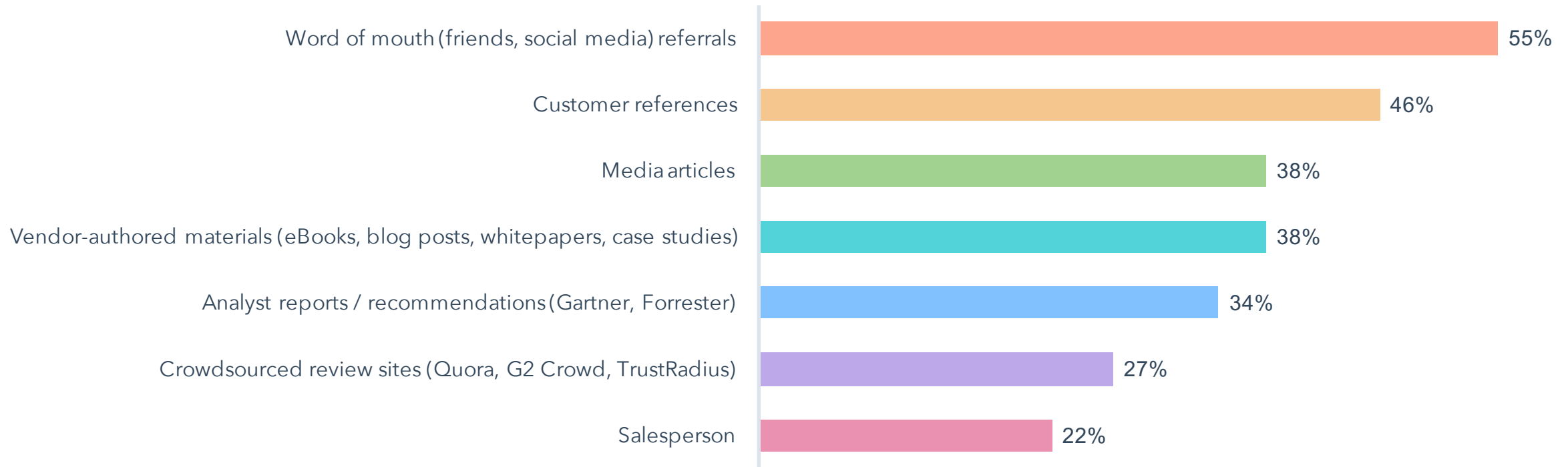
Reaching Buyers

Your customers are your best salespeople and brand ambassadors – everyone from the most senior executive to an individual contributor trusts the recommendations of friends, family, and customer references to business purchases.

More and more, buyers are going to social networks and messaging applications to engage with businesses – especially those in Latin America and Asia.

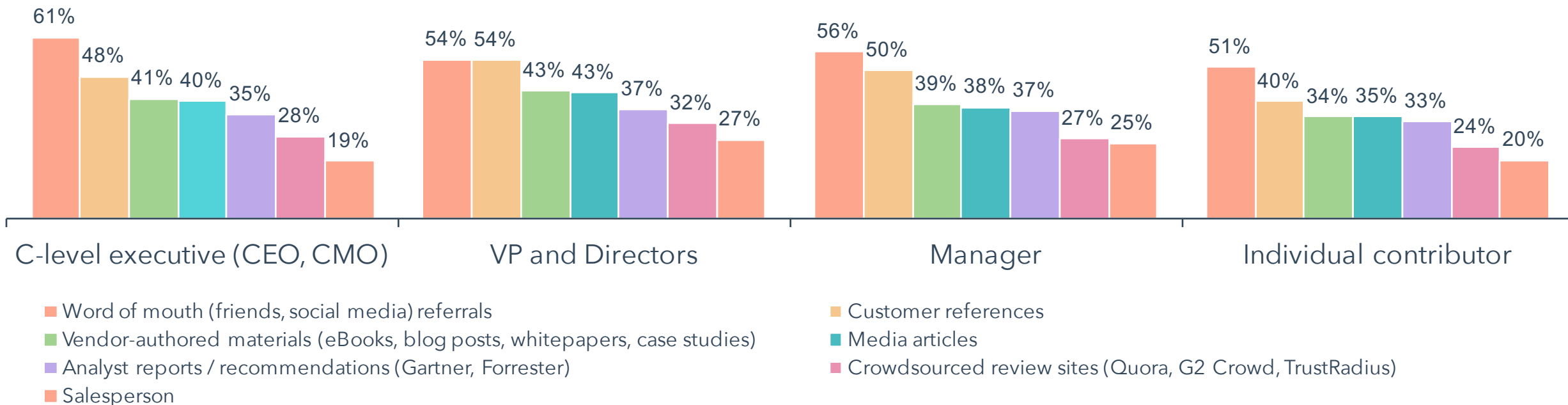
Customers are advocates - word of mouth help people make buying decisions

What sources of information do you rely on when making purchase decisions for business software?



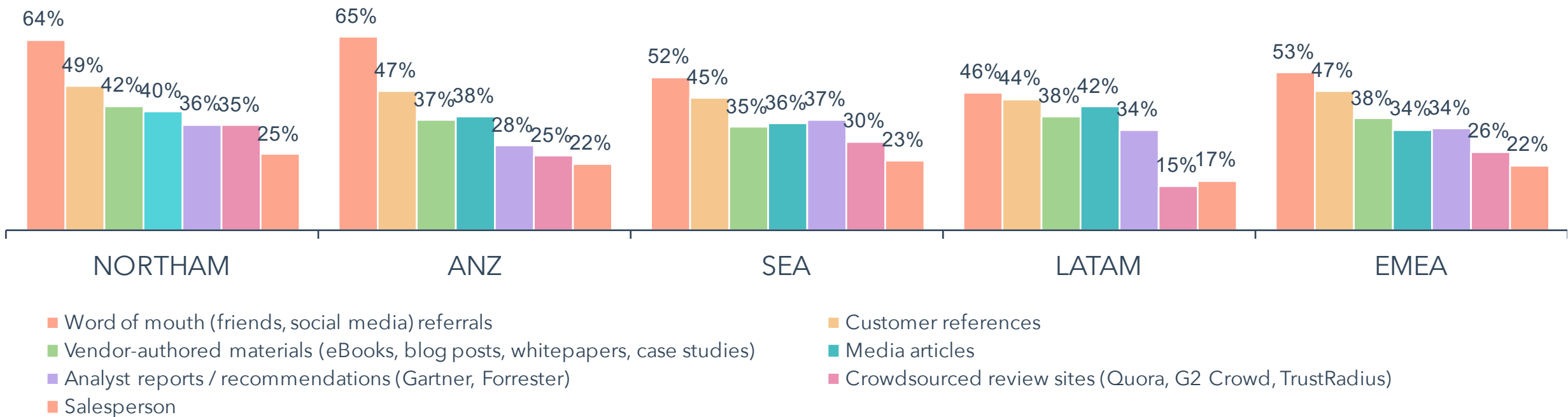
Senior leaders especially favor word of mouth to make purchase decisions; sales is last

What sources of information do you rely on when making purchase decisions for business software?



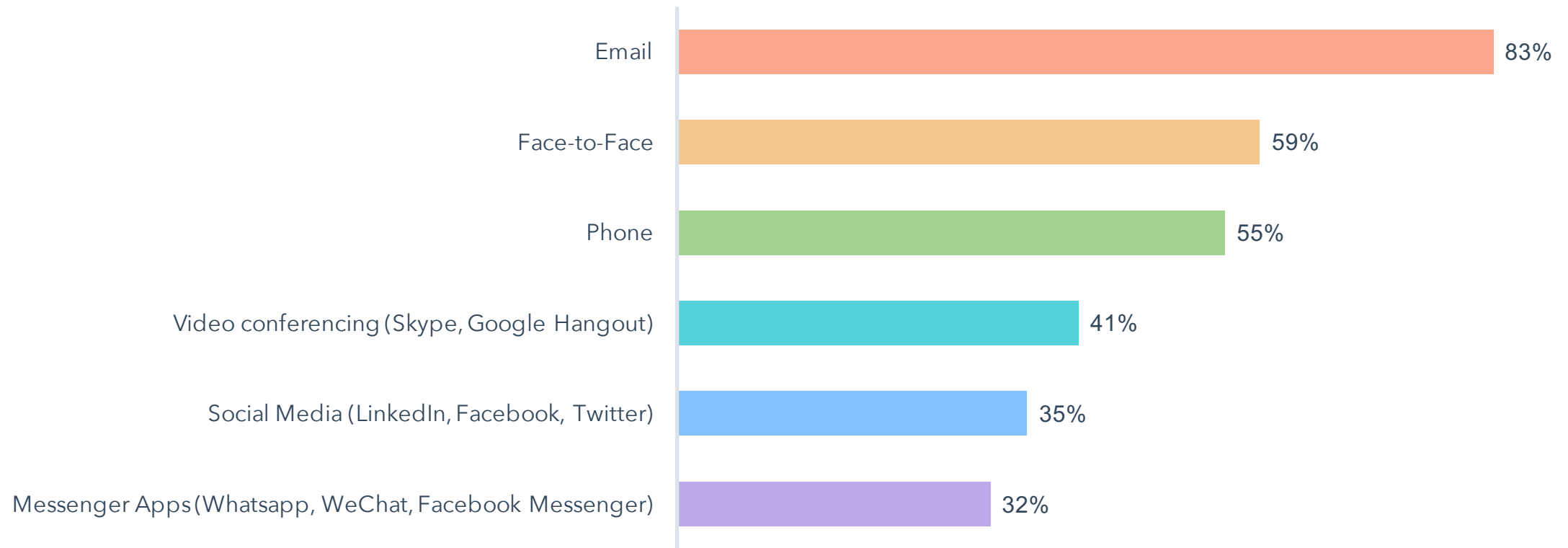
Preferences are consistent globally

What sources of information do you rely on when making purchase decisions for business software? (by Region)



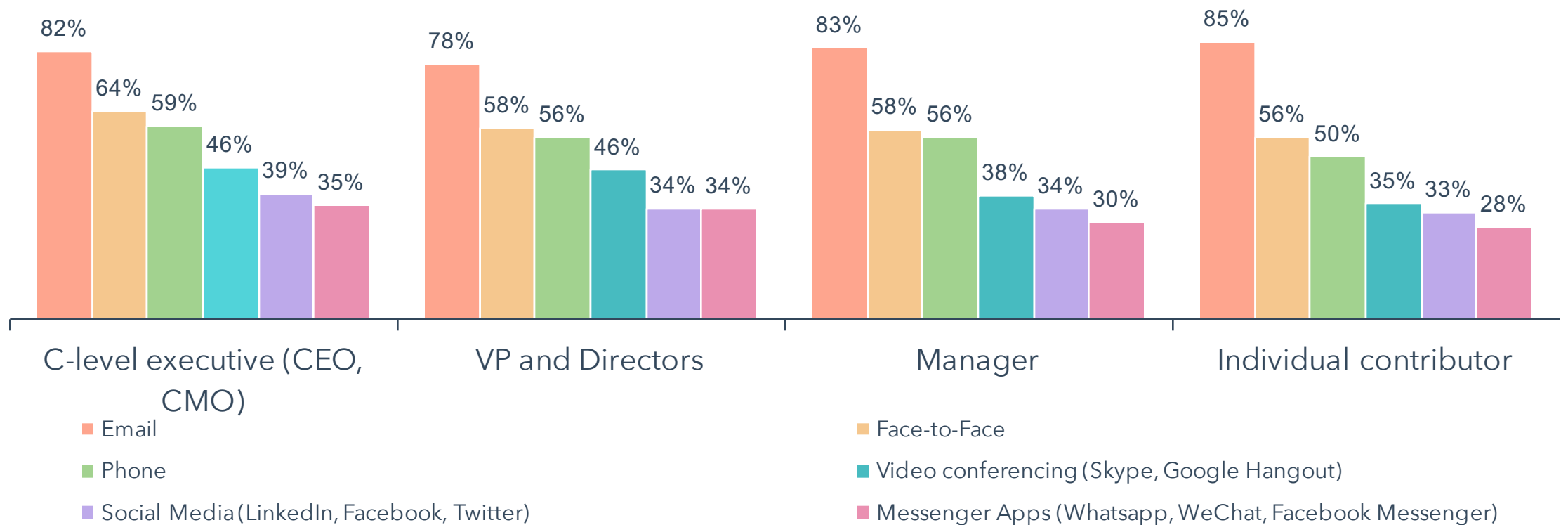
Businesses today run on email

How do you prefer to communicate for business purposes?



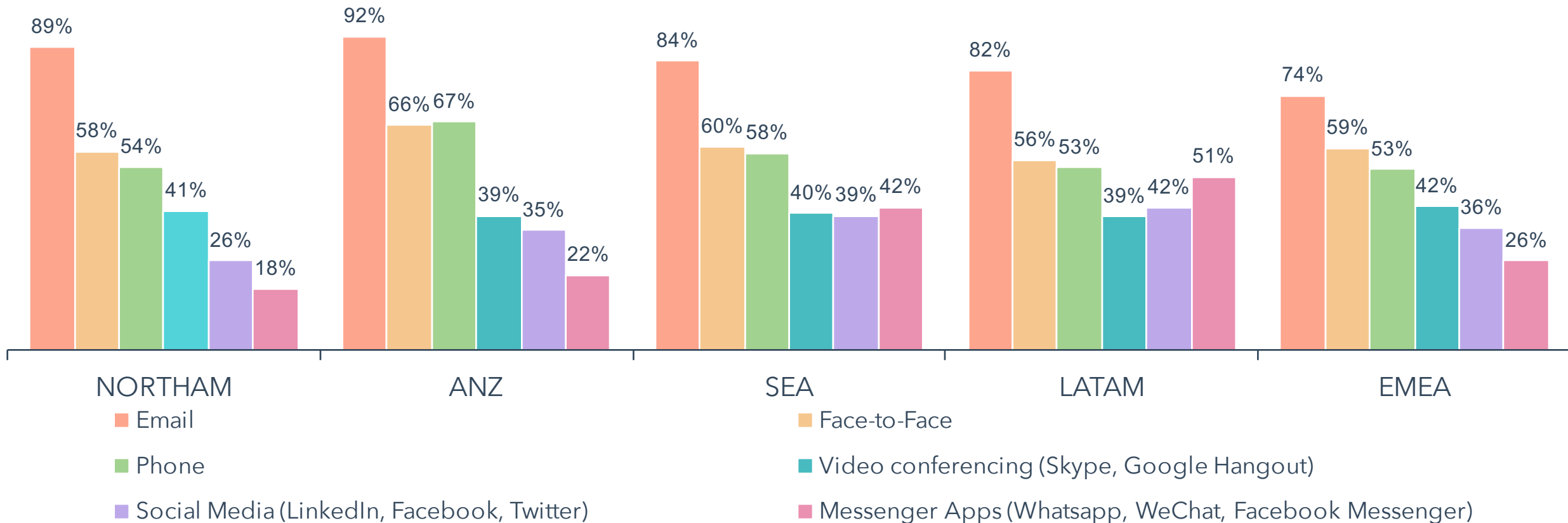
Senior staff are more interested in using messaging for communications

How do you prefer to communicate for business purposes? (by Title)



Messenger apps are popular in Latin America and Southeast Asia

How do you prefer to communicate for business purposes? (by Region)

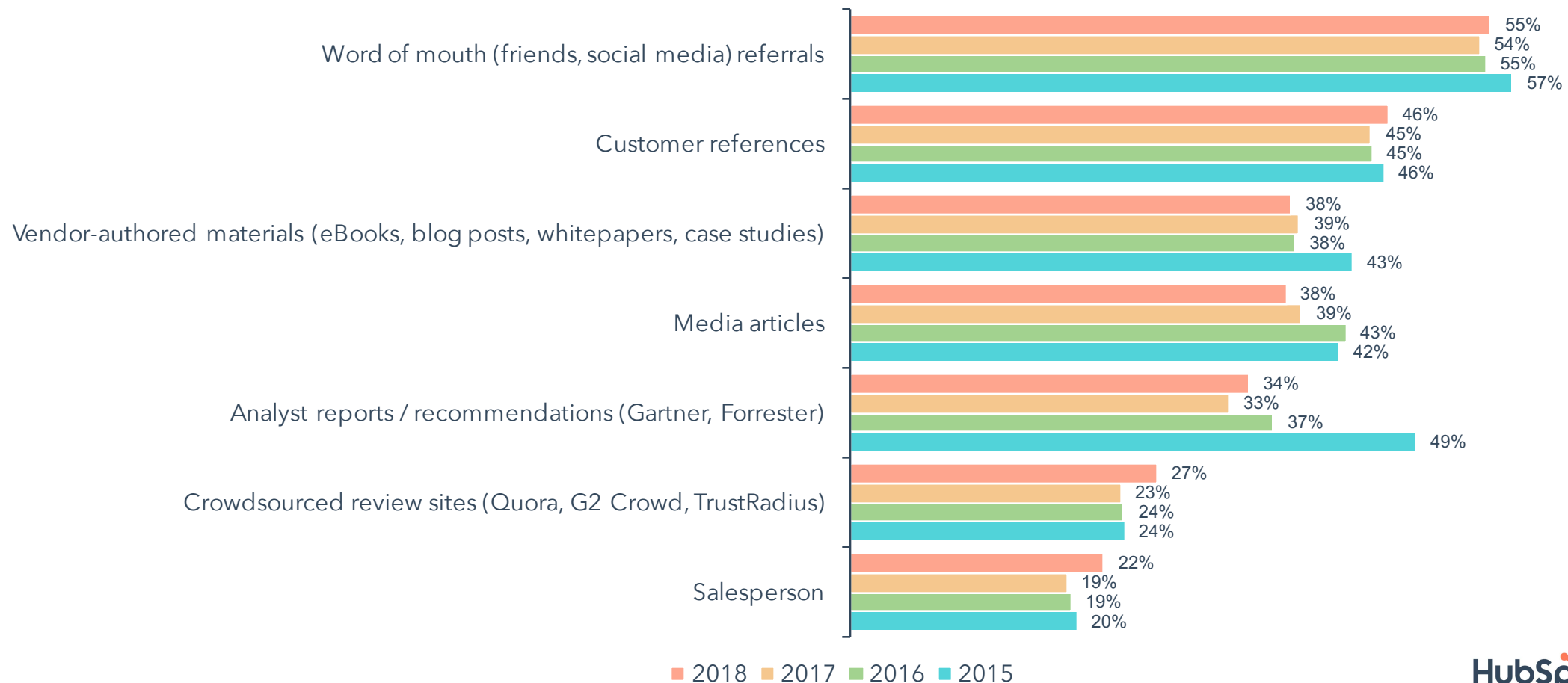


Trend data

We've been asking questions around priorities and challenges for years. Peek into our archives to see what has changed, and what's been consistent, for businesses over the years.

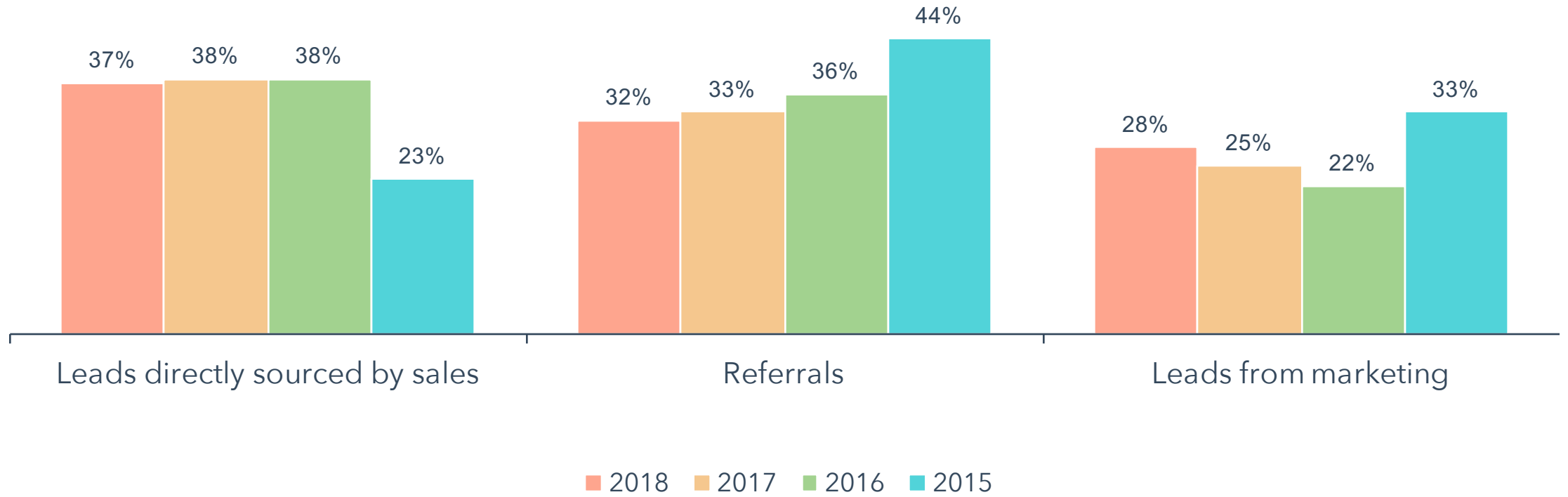
Review sites have grown in importance while analyst firms declined

What sources of information do you rely on when making purchase decisions for business software?



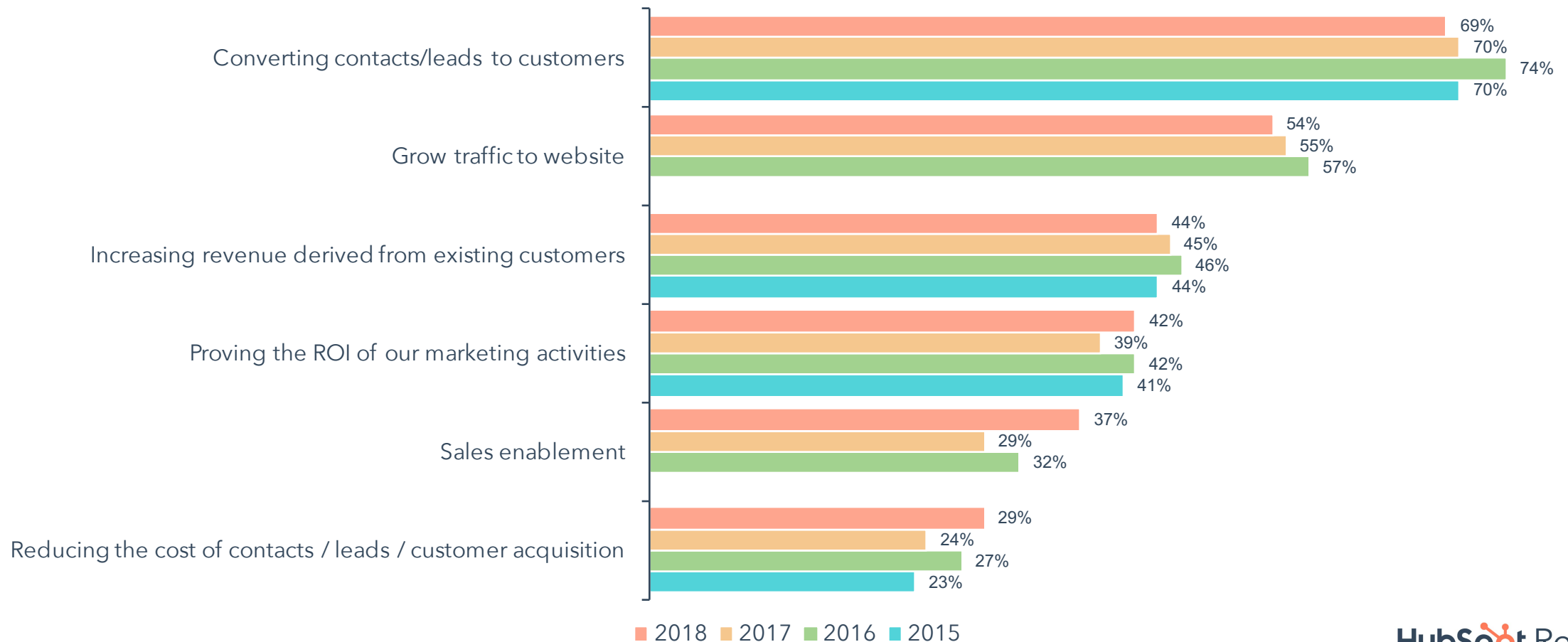
Sales says they source the most leads themselves

Which is the top source of leads for your sales organization?



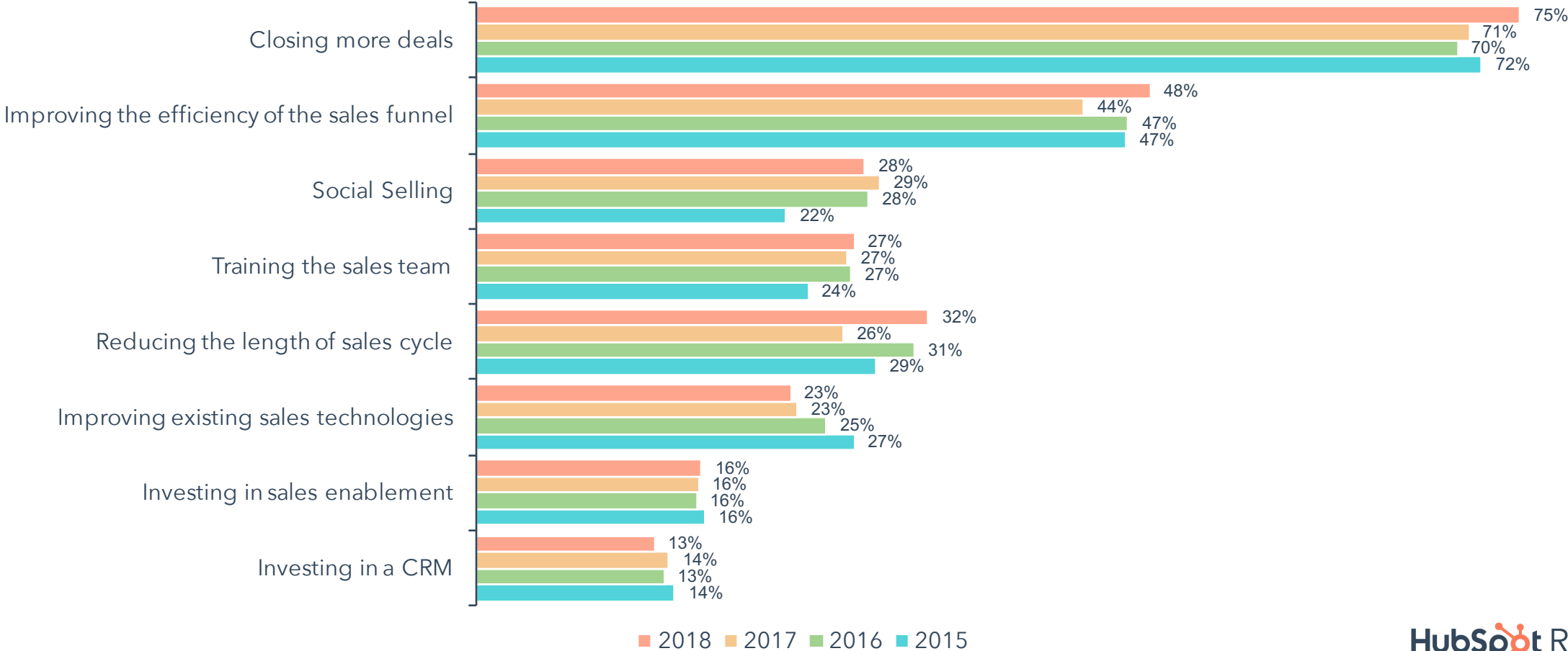
Marketing priorities have been consistent through the years

What are your company's top marketing priorities over the next 12 months?



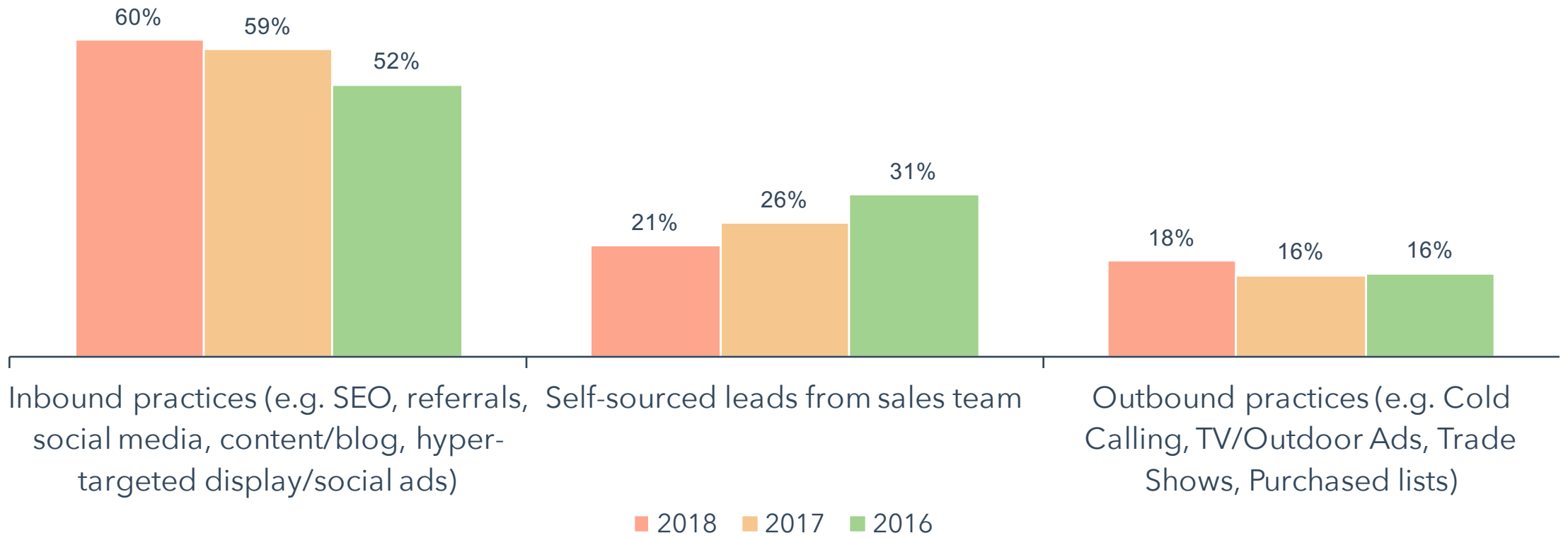
As have sales priorities

What are your company's top sales priorities for the next year?



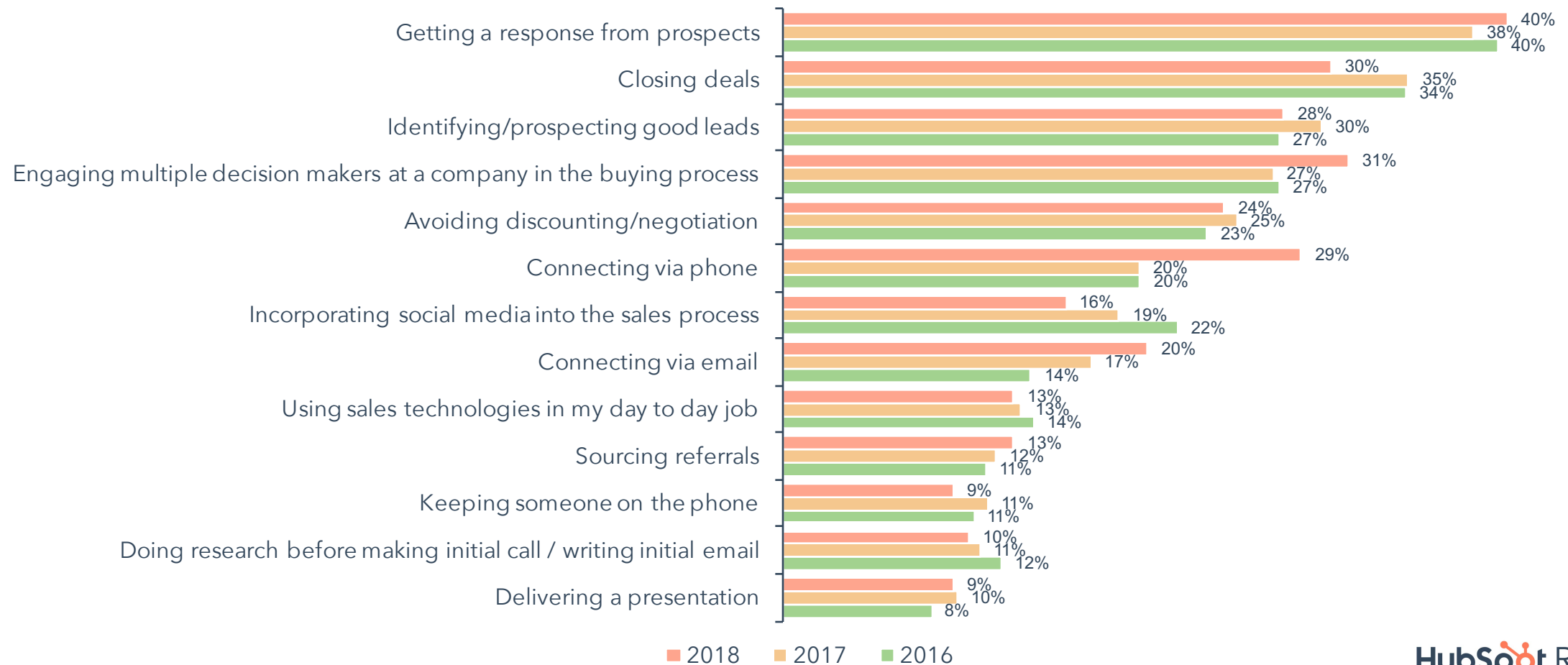
Marketers have increased the quality of their leads

Which source provides the highest-quality leads for your sales team?
(Select one) (Marketing answered)



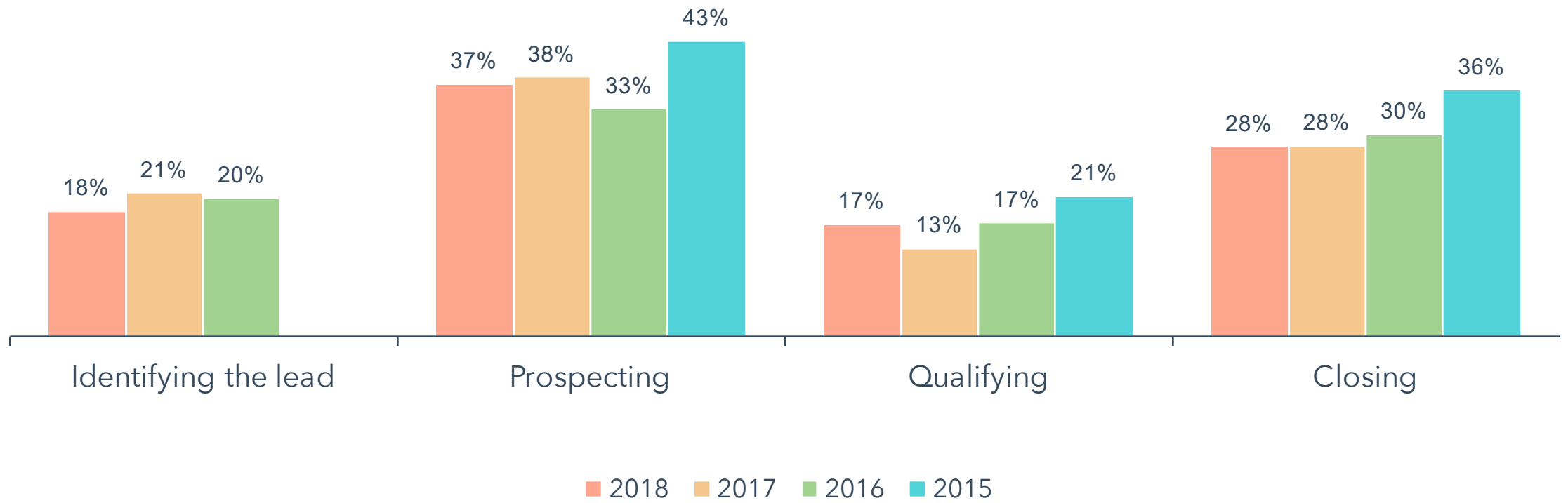
It's harder to get people on the phone, but sales has figured out how to leverage social media

What is more difficult to do in sales compared to 2 to 3 years ago?



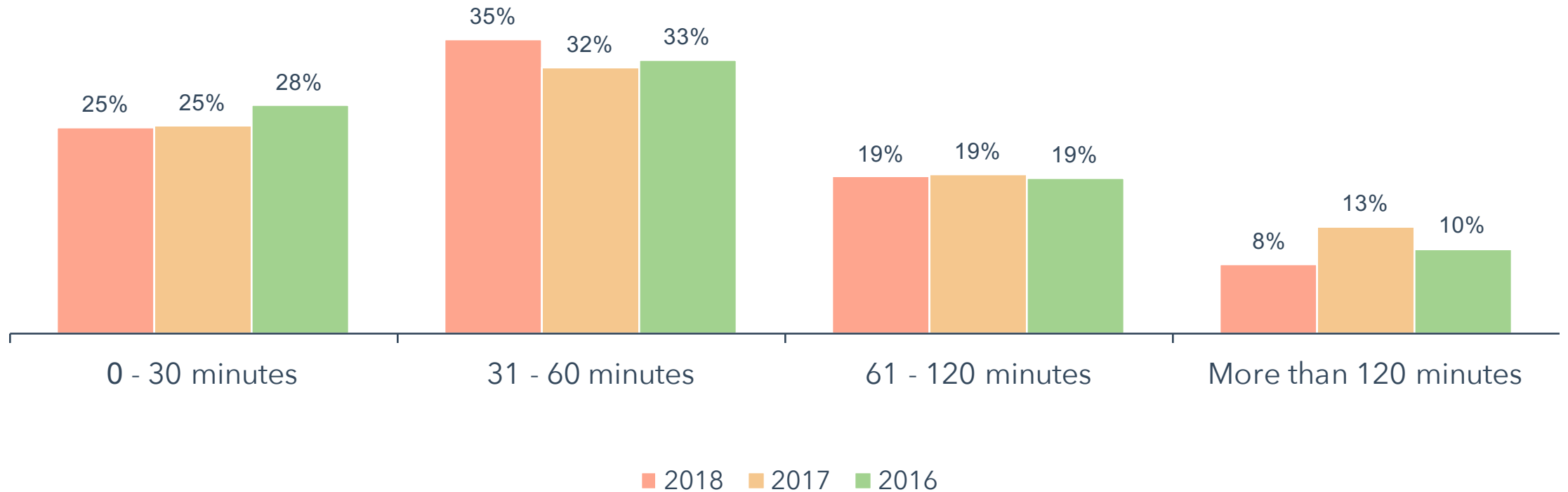
Prospecting has been consistently difficult

In your opinion, what part of the sales process do reps struggle with most?



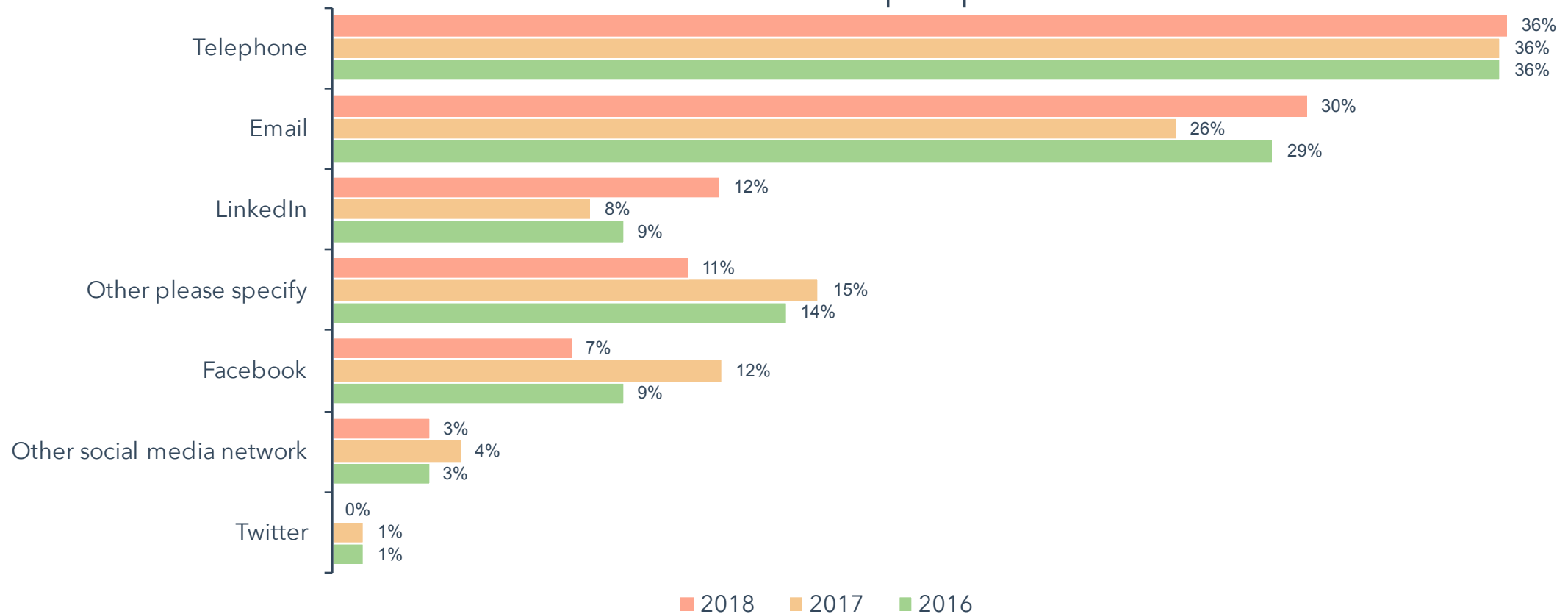
More salespeople are spending up to 60 minutes a day on data entry

On average, how much time per day does your sales team spend performing data entry or other manual tasks?



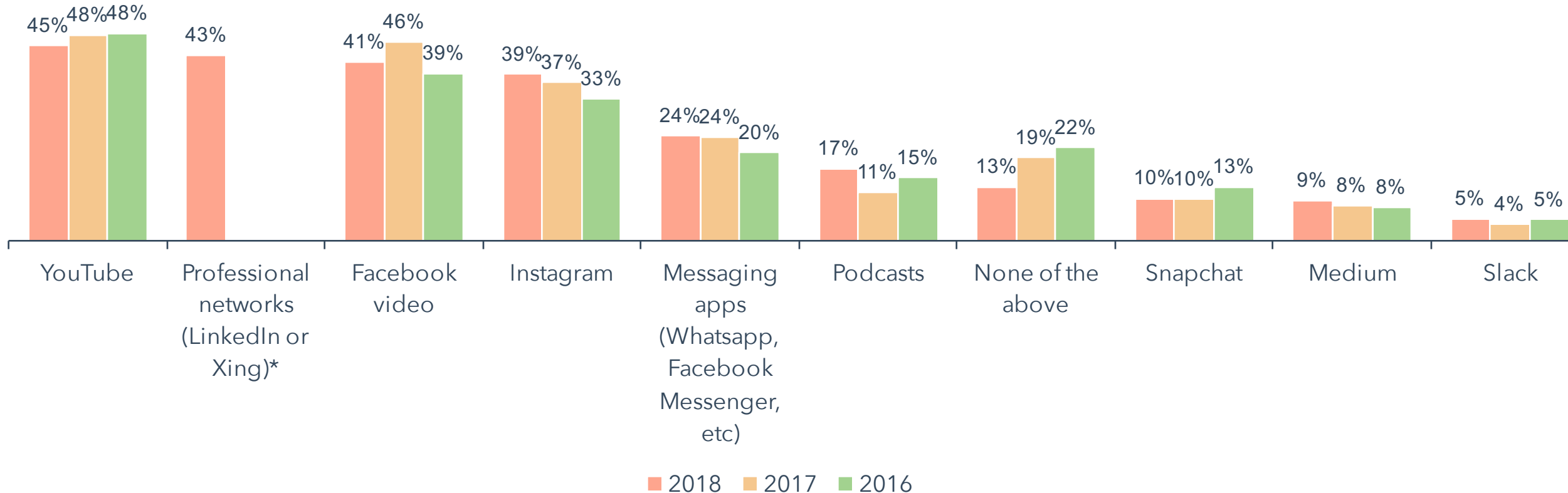
LinkedIn has become a sales channel

What has been the most successful channel for your sales representatives to connect with a prospect?



Marketing teams have invested in video, Instagram, and messaging

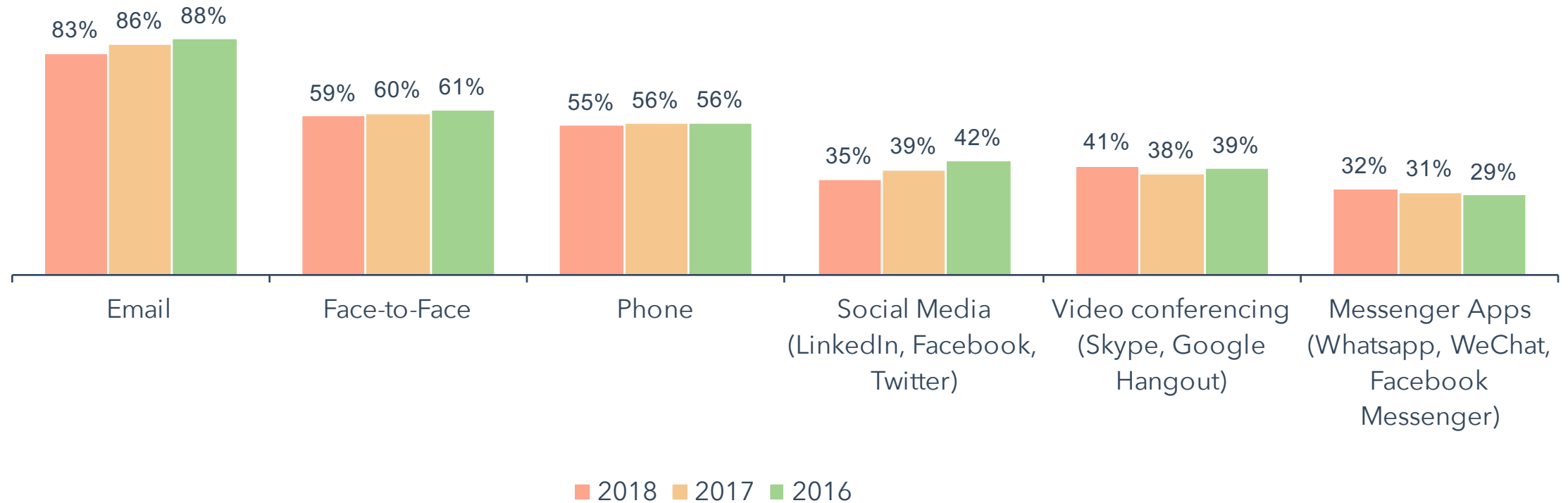
What content distribution channels do you plan to add to your marketing efforts in the next 12 months?



*New option in 2018

How do you prefer to communicate for business purposes?

How do you prefer to communicate for business purposes?



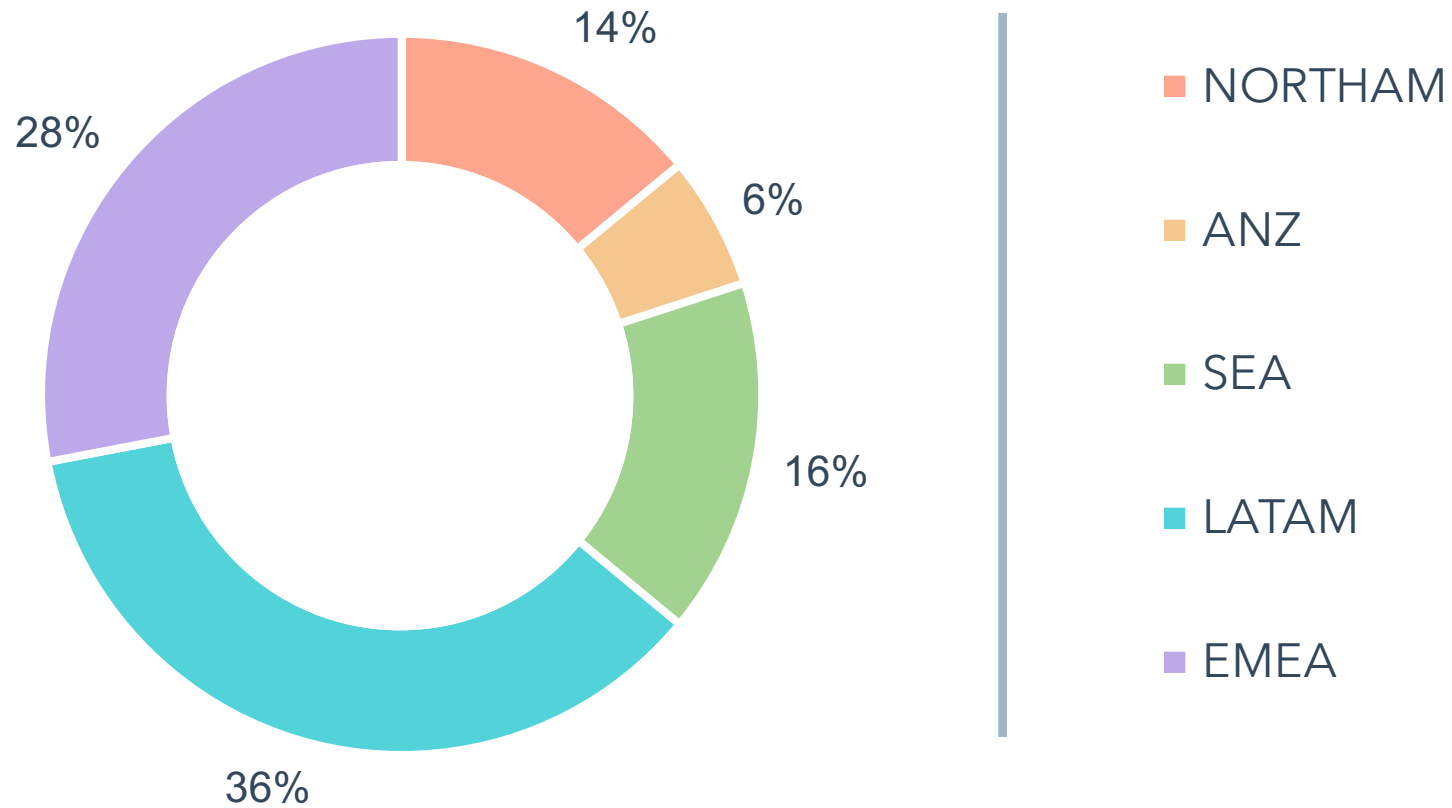
Who we surveyed

This year, over 6200 respondents from 99 countries answered our questions. Our respondents come from a mix of industries, company sizes, and levels of seniority.

The State of Inbound Survey ran from February through March 2018. The sample set is comprised mostly of voluntary responses from invitations to HubSpot contacts and partners. HubSpot supplemented a smaller number of panel responses in certain geographies (southeast Asia and central Europe) to ensure a valid sample size. Sample was sourced via Lucid, a survey panel provider.

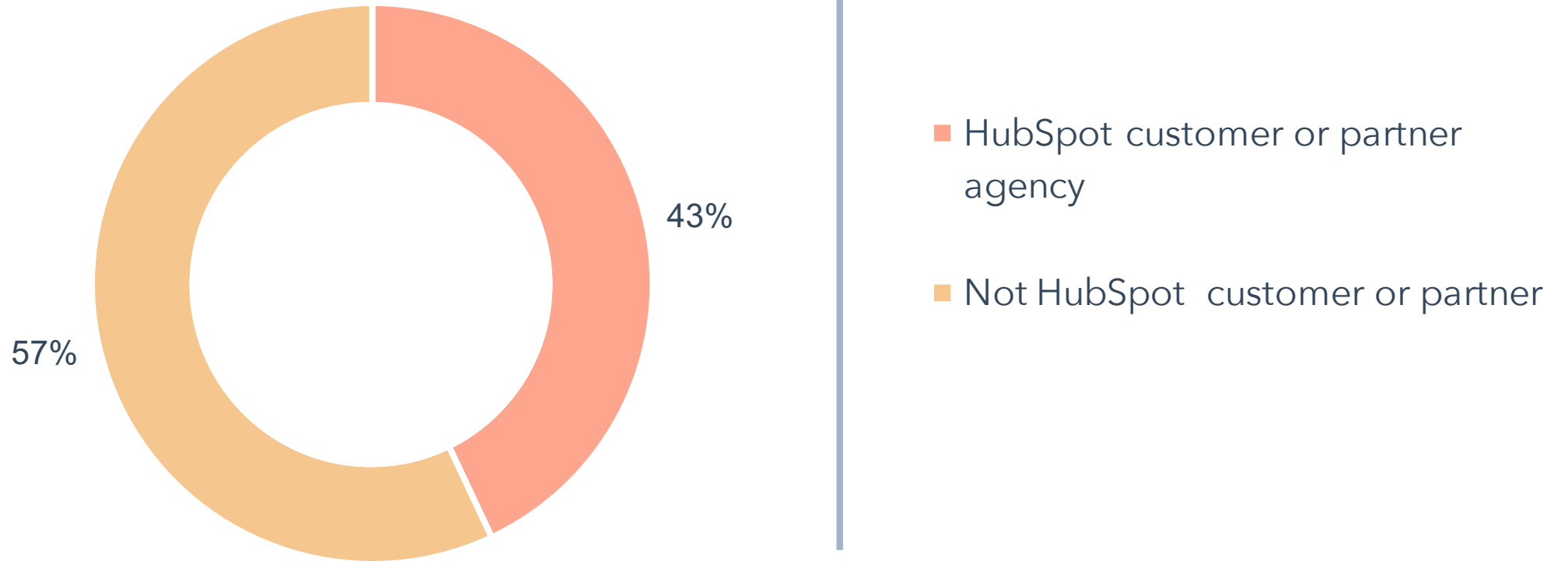
Location

Where are you based?



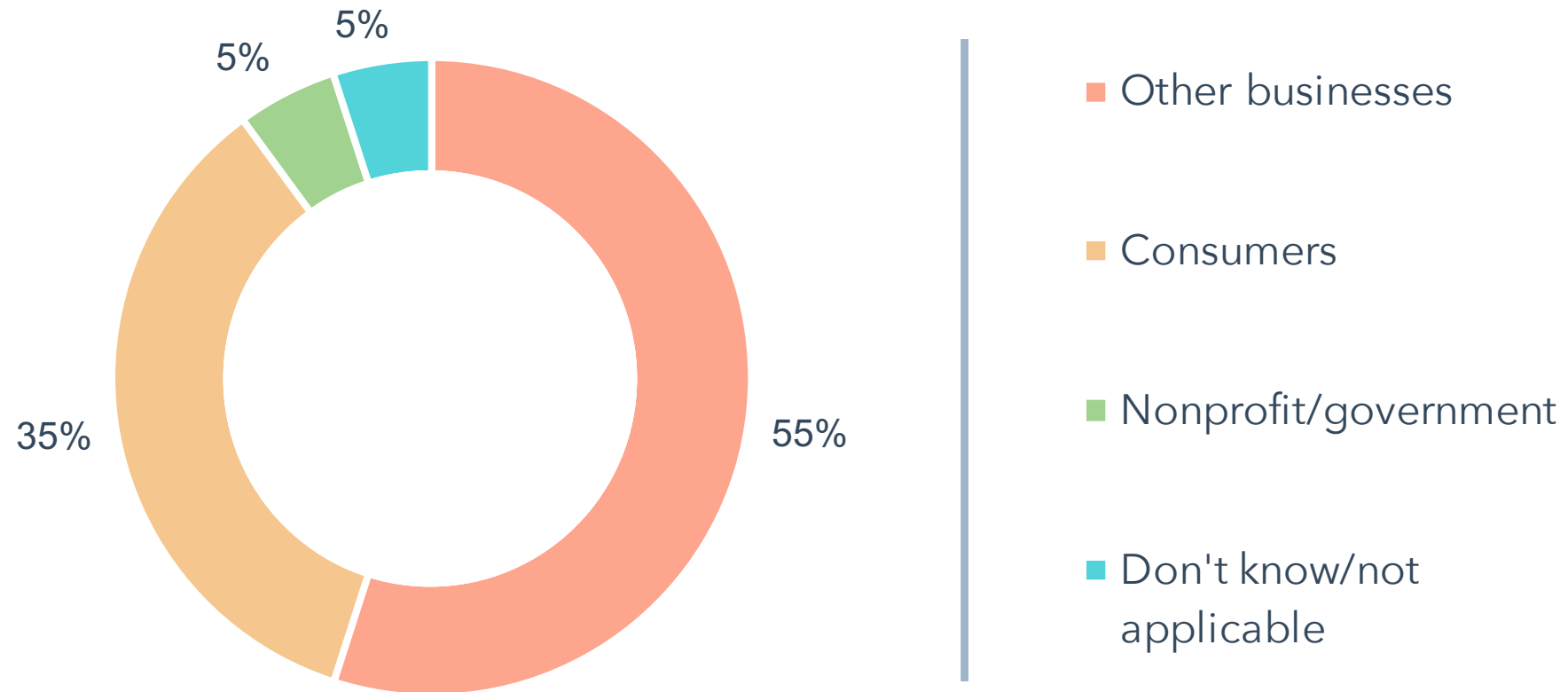
Company type

Is your company any of the following?



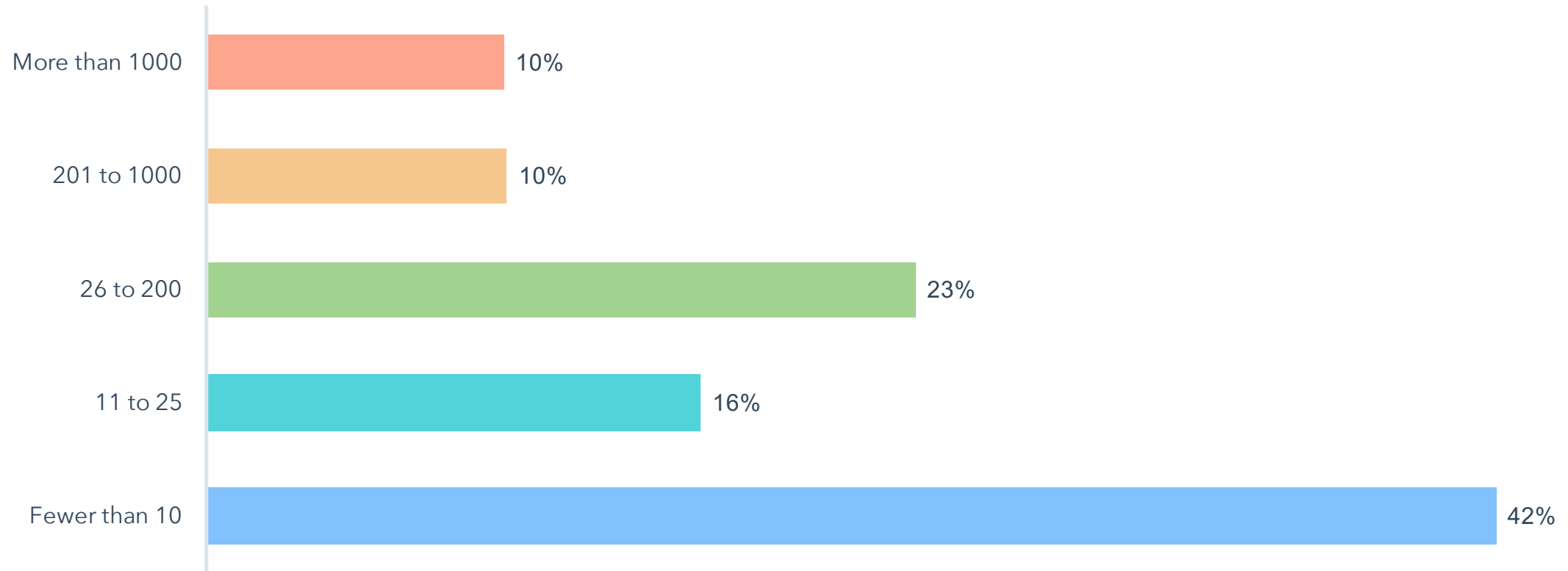
Company profile

To whom does your company primarily sell?



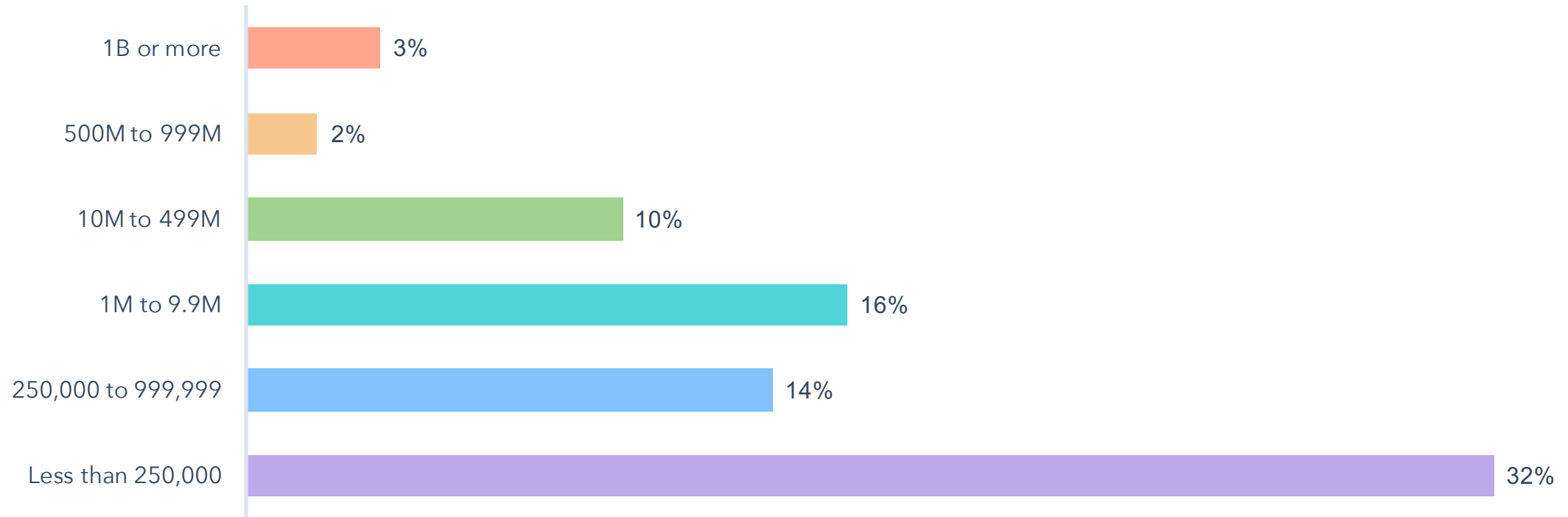
Company size and revenue

How many full-time employees does your company have?



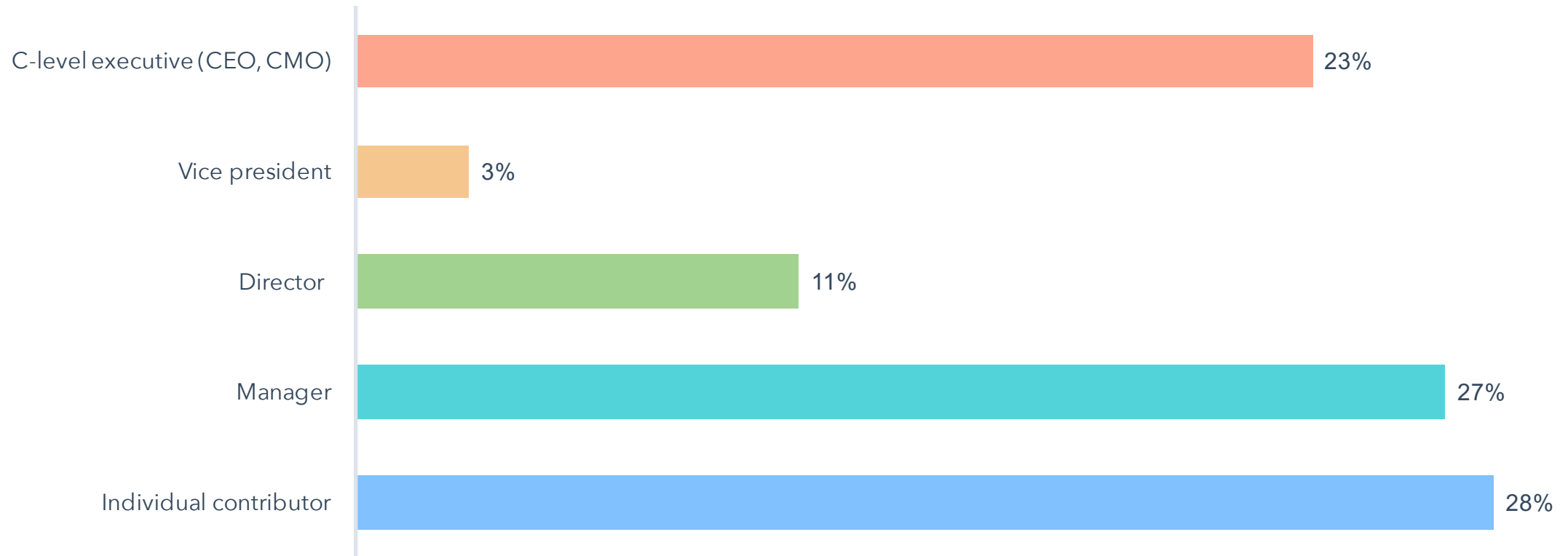
Company size and revenue

What best describes your company's average annual revenue? (Please estimate in USD)



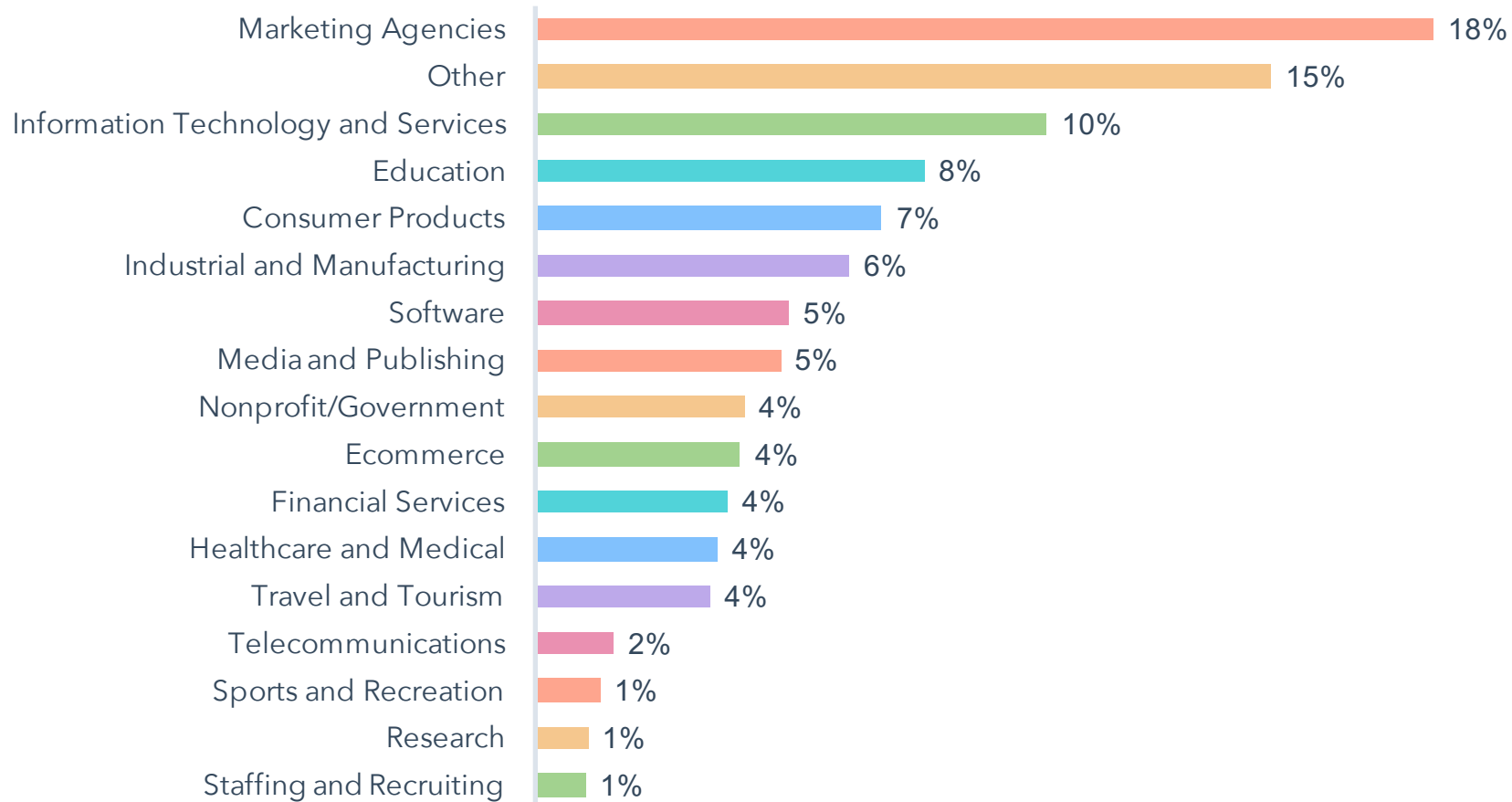
Level of seniority

What best describes your level in your company?



Industries represented

Which of the following best describes the principal industry of your organization?



Created by:



Mimi An

Mimi An, Principal Research Analyst, manages HubSpot Research. She focuses on original market research and data mining HubSpot's product data. Before joining HubSpot, Mimi was a strategic program manager and market researcher at Intel and also served as market intelligence consultant at Forrester Research.