

STATE of INBOUND ²⁰/₁₅ *Asia*

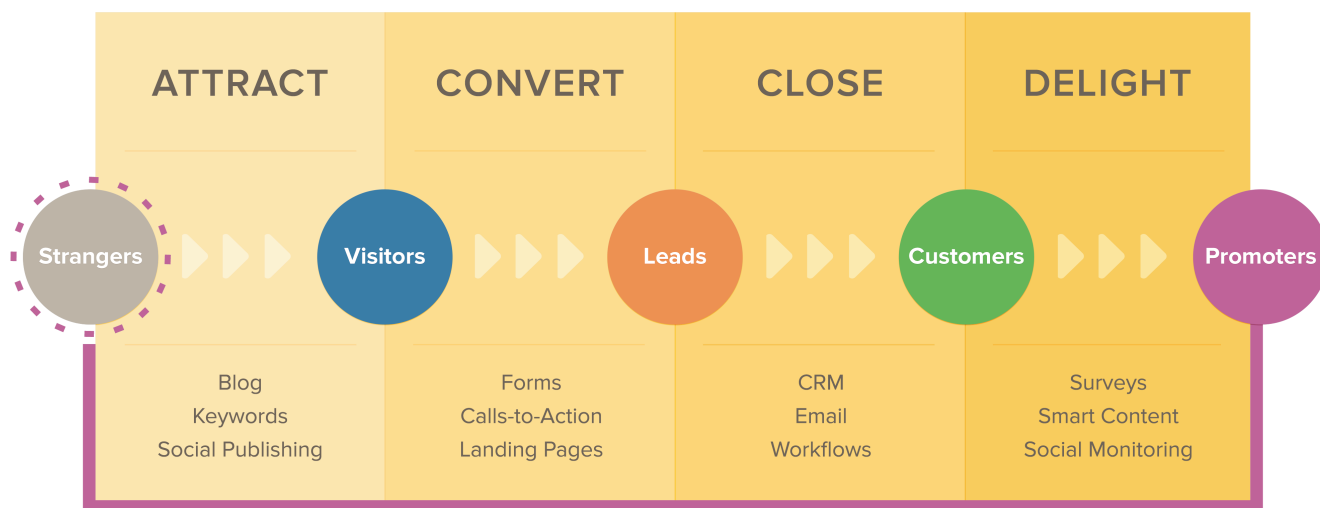
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Welcome to the first-ever annual **State of Inbound Asia** report. We're glad you're here! Whether you're familiar with inbound marketing or just downloaded it out of curiosity, you're bound to have some questions.

“What is *Inbound*?”

Inbound is the proven methodology for the digital age. Since 2006, inbound marketing has been the most effective marketing method for doing business online. Instead of traditional outbound marketing methods of buying ads, buying email lists, and praying for leads, inbound marketing focuses on creating quality content that pulls people toward your company and product. By aligning your **content strategy** with your customer's interests, you can naturally attract inbound traffic that you can then convert, close, and delight over time.



by HubSpot

Inbound fits in with your digital marketing strategy. Above, we've highlighted the four stages of inbound methodology, and the online channels and tools you can use at each stage. You're probably already using many of these, which means moving towards an inbound marketing strategy is less time-consuming and difficult than you think!

“What is State of Inbound Asia?”

Every year, HubSpot surveys thousands of the world’s foremost marketers, salespeople and IT/services professionals involved in marketing activities -- HubSpot customers and non-customers alike. We poll them on their most pressing priorities, the challenges they face, and the tactics they’ve used to meet those challenges head-on. We track our respondents’ quantitative answers, collage and consolidate their anecdotal answers, and put the polished result into a master report.

This year, we are taking it one step further -- **focusing exclusively on Asia**. We’ve delved into the current digital marketing landscape and analysed marketers’ priorities, challenges, and best-in-class practices. In addition, we pulled from global data to compare the state of marketing in Asia with global trends.



Some questions this report answers include:

- What are the priorities of marketers in Asia?
- What ROI are marketers seeing from traditional vs. inbound marketing?
- Which challenges are most pressing for marketers?
- How aligned are marketing and sales, and does it correlate with performance?
- How does Asia benchmark against global marketing trends?

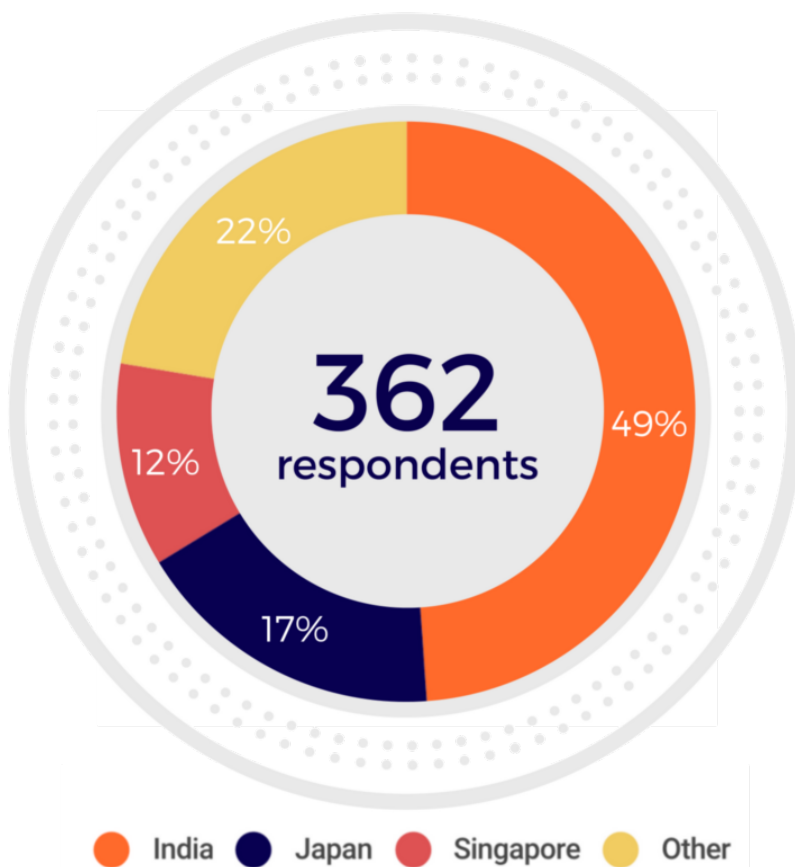
We hope that this report gives you more clarity into how marketers are marketing in Asia, and serves as a guide when you plan your 2016 inbound strategy.

Who we talked to

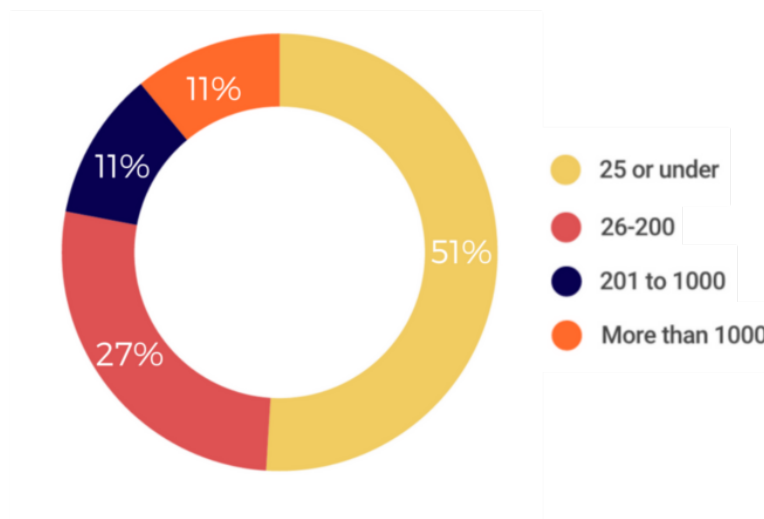
Over two thirds of our 360+ respondents are marketers, salespeople and IT/services professionals based in Asia who work in business-to-business (B2B) companies in the small-to-medium business (SMB) size and perform marketing activities. In addition, only 14% have an affiliation with HubSpot, so this data captures a truer sample size of business professionals in the region.

We also draw from the global State of Inbound results, which consisted of 3,900+ respondents from around the world, to benchmark marketing trends in Asia against global trends.

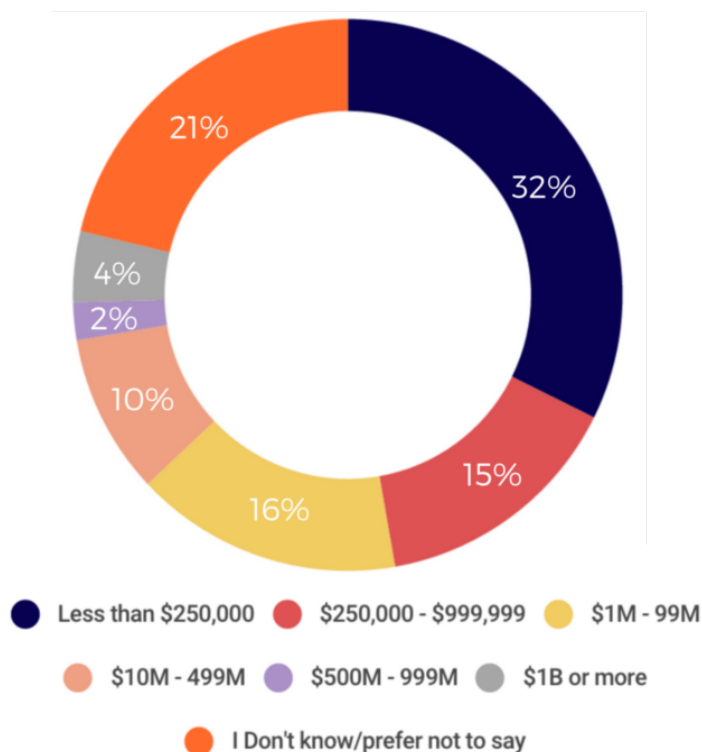
We hope this look into marketing strategy in Asia can serve as a roadmap for your organisation's entire approach to inbound marketing in 2016. All data was gathered in the latter half of 2015 to give as accurate a representation of the current industry landscape as possible.



How many full time employees does your company have?

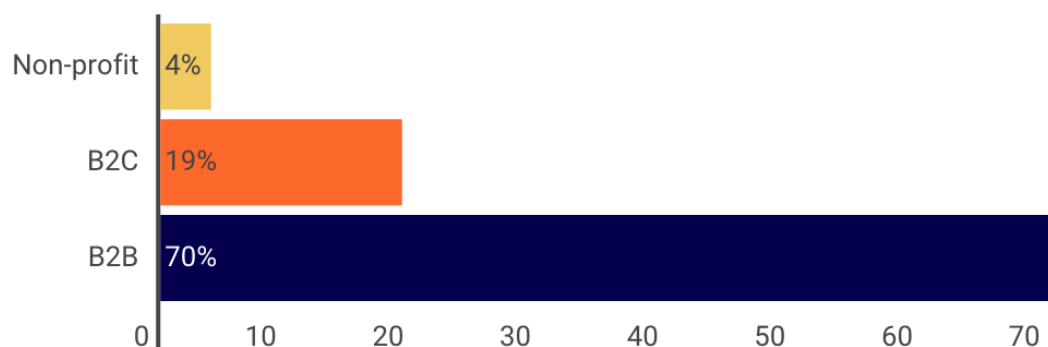


What best describes your company's average annual revenue?

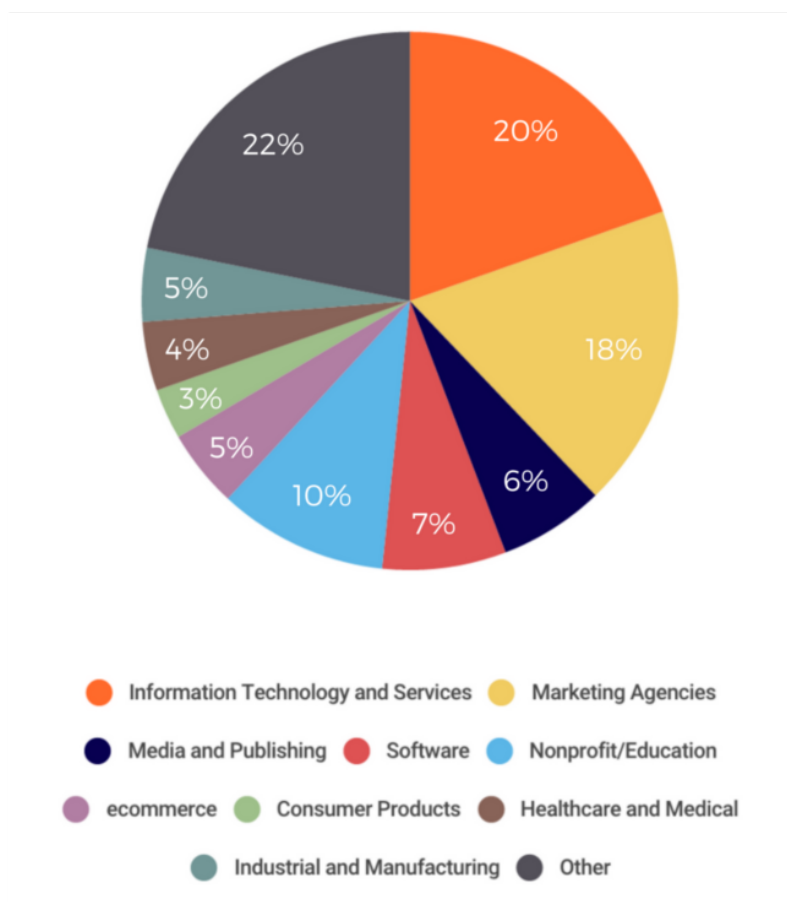


Three out of four respondents we surveyed fall into the small-to-medium business (SMB) category and work in businesses generating less than \$1M USD annually.

Who does your company primarily sell to?

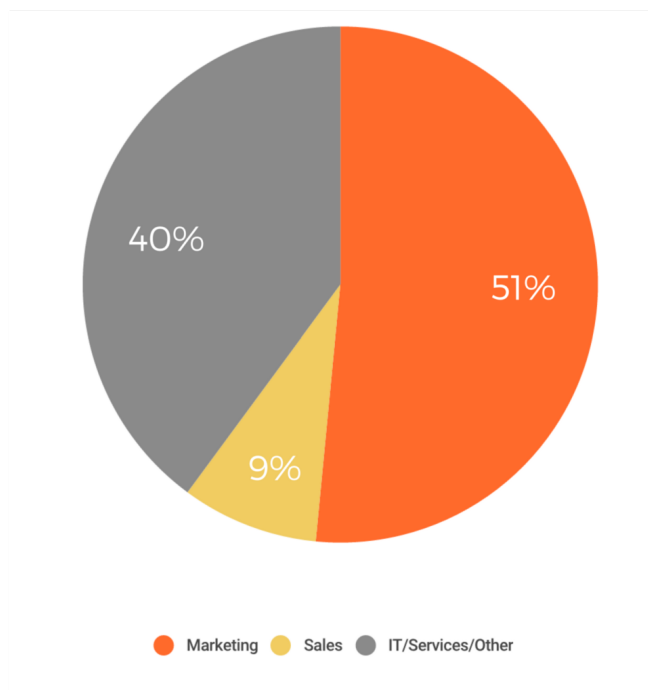


Which of the following best describes the principal industry of your organisation?

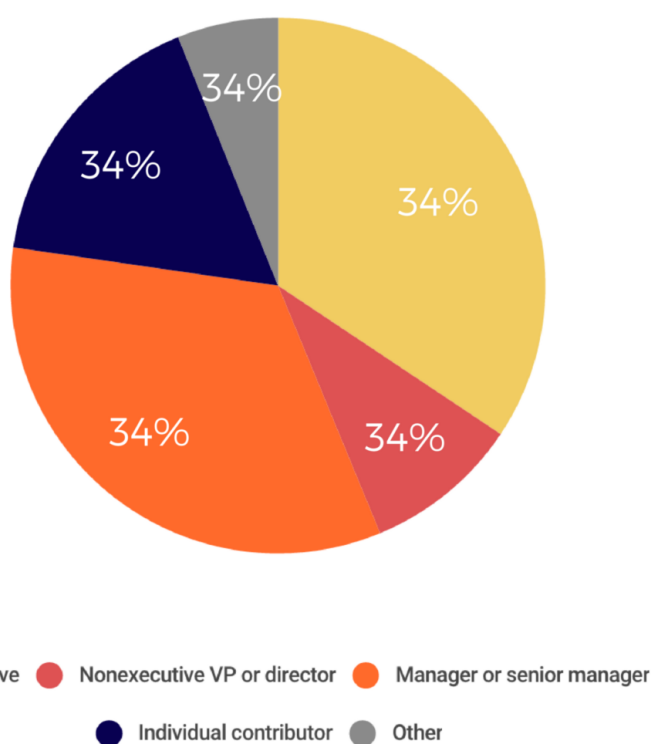


Respondents were primarily from business-to-business (B2B) organisations, with IT and services and marketing agencies accounting for the largest segments.

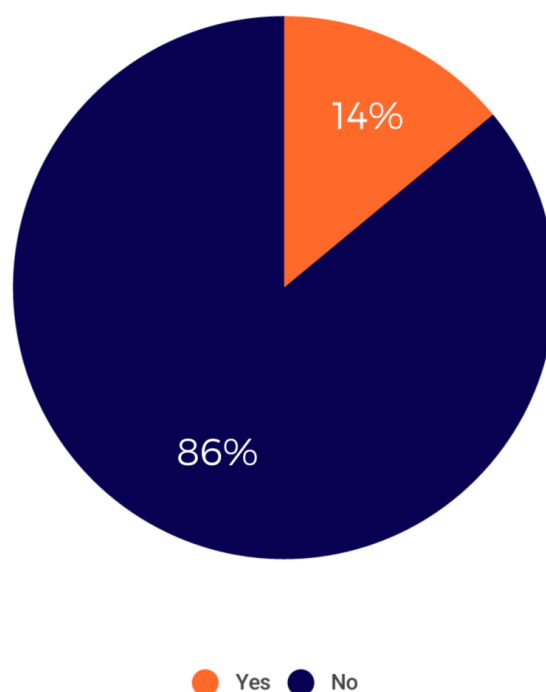
What best describes your function in your company?



What best describes your level in your company?



Are you a company or agency that uses HubSpot software?



Quick Fact Sheet

1. **3 out of 4 marketers** in Asia prioritise an inbound approach to marketing
2. B2B, B2C, and nonprofit marketers all **choose inbound marketing nearly 60-70% of the time** over outbound
3. Companies of all sizes demonstrated a greater preference for inbound tactics, but **especially SMBs**
4. Both inbound and outbound marketers agree overwhelmingly that **traditional paid ads are the #1 most overrated marketing tactic**
5. Asian marketers' top 2 inbound marketing activities are **growing SEO/organic traffic** and creating **blog content**
6. **Generating contacts/leads** and **converting them into customers** are the top priorities for marketers in Asia
7. While measuring ROI and securing budget are the top 2 challenges across regions, **creating content for international audiences and hiring top talent are also top challenges** for Asian marketers
8. Marketers in Asia who measured marketing analytics 2+ times a week were **twice as more likely to achieve greater ROI**
9. Leading marketers recognise that **inbound is a long-term investment**. Both past success and past failure with inbound correlates with an inbound marketing budget increase.

A person is sitting on a couch, holding a tablet computer. The image is overlaid with a warm orange color. The text "CHAPTER 1" is written in white, bold, uppercase letters. The number "1" is inside a white speech bubble icon.

CHAPTER 1

GROWTH OF *Inbound*

TV advertising, billboards, and print ads haven't stopped, but digital marketing has picked up a lot of steam. Especially inbound, which combines compelling content with a digital strategy that attracts rather than annoys. With digital tools such as websites, SEO, social media, and email making it easier to get in front of customers, it's many small companies' answer to big marketing budgets.

While traditionally, companies both large and small, in every segment, needed to focus a large part of their strategy and subsequent budget on pushy advertising that yielded no long-term results, we've noticed a major adoption of inbound methodology, **which prioritises compelling content over ads, and pulling customers to you rather than pushing your message onto them.**

This year's State of Inbound Asia survey reaffirmed and reinforced this storyline:

- More companies than not, regardless of size, use inbound marketing strategy
- SMBs more often use inbound; bigger companies use both outbound and inbound
- Getting more leads and converting more of them is a top priority across company sizes and sectors
- Proving ROI and getting more budget are the leading challenges marketers face.
- Proven inbound marketing ROI unlocks budget

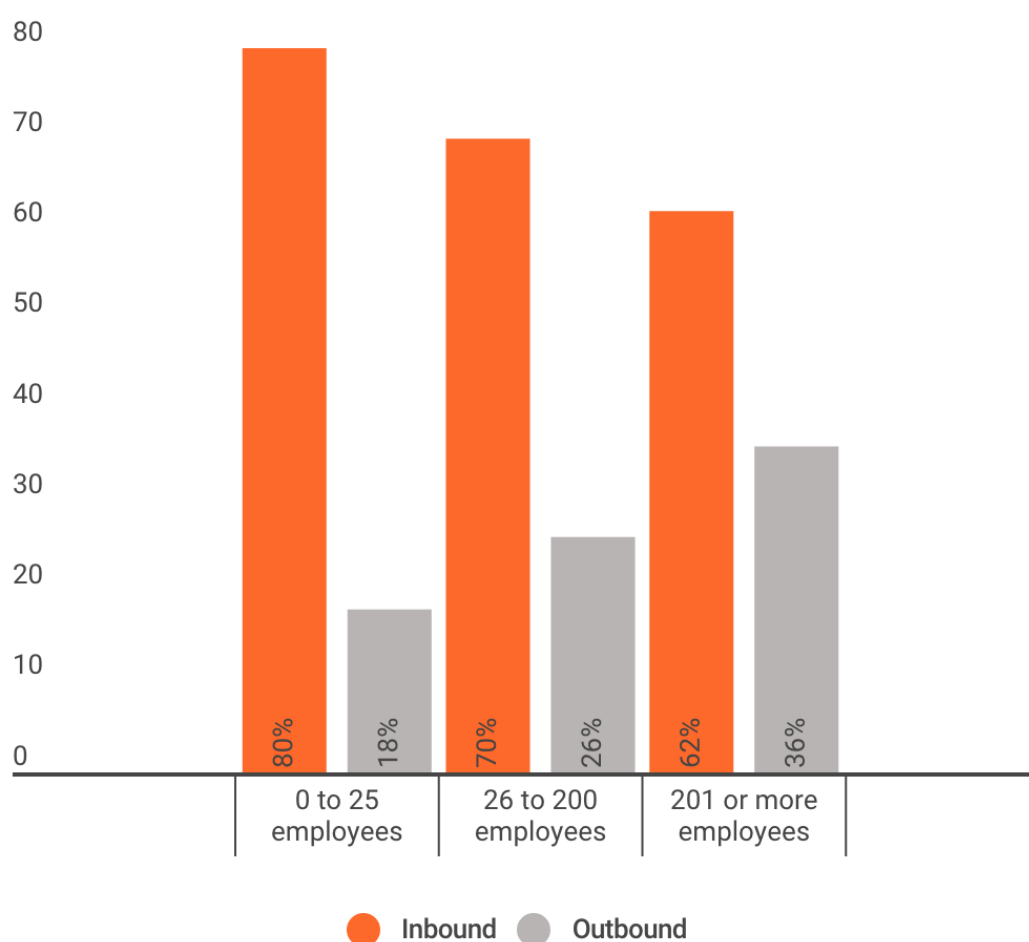
Inbound is king, but outbound still matters to big companies

Inbound continues to be the core marketing strategy of the lean SMB -- those 25-200 employee operations either fighting for growth, or just beginning to enter the growth phase. Over four times as many respondents from companies with fewer than 25 employees cited inbound as their primary marketing approach, while more than double the number of 26-200 person companies cited the same.

At companies with over 200 employees, inbound marketing strategy still wins, but outbound marketing is used much more than with other segments. This shouldn't stun us -- with bigger budgets comes the ability to throw dollars at paid marketing campaigns, even while running them alongside tried-and-true inbound principles.

Inbound vs. Outbound by Company Size

Inbound is the dominant marketing strategy for all company sizes but especially those with fewer than 200 people



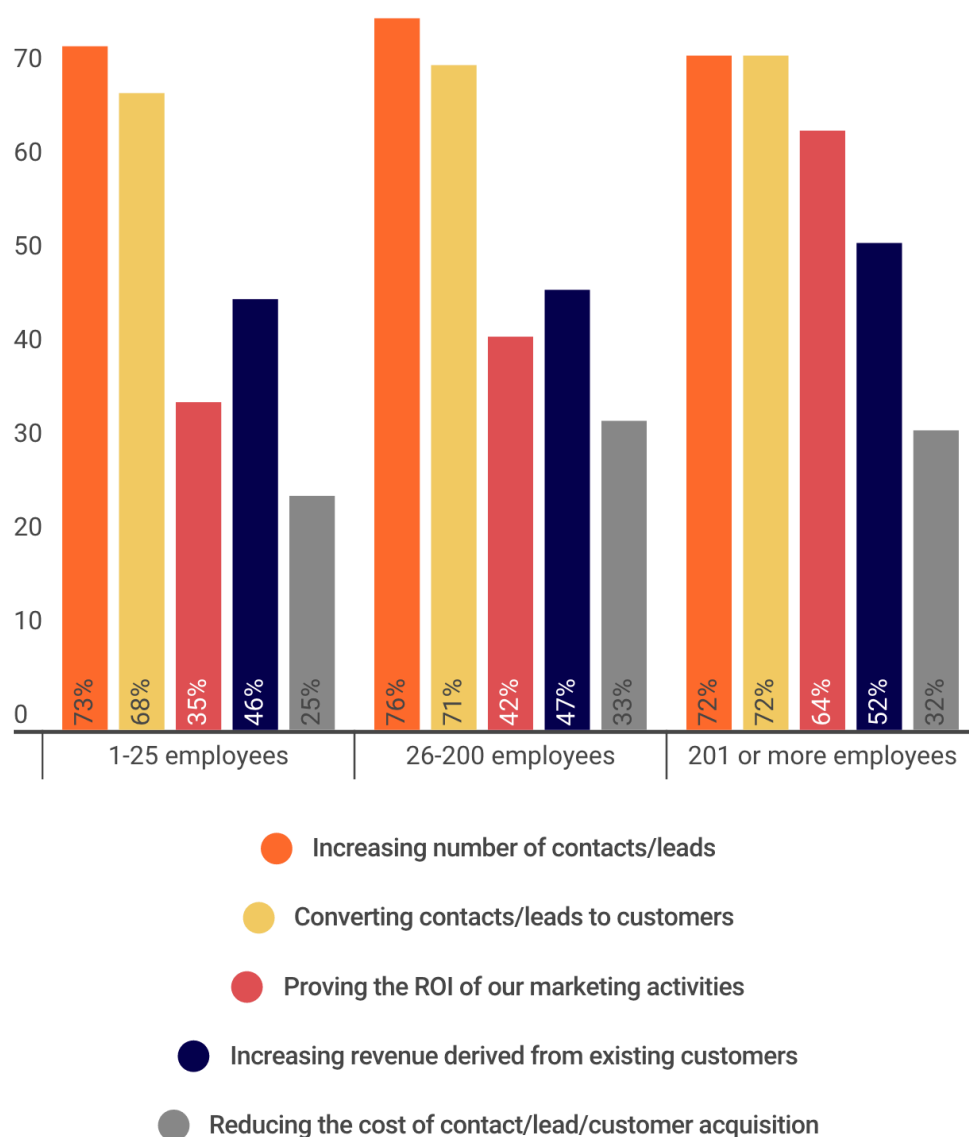
Leads (and converting them) remain a top priority

Increasing the volume at the top of the funnel while increasing conversion percentage at the bottom remain top priorities for respondents. This was true across all company sizes and types.

Moreover, these two priorities were of nearly equal importance across all segments. Among SMBs, “increasing number of contacts/leads” and “converting contacts/leads to customers” were at least 24% more likely to be cited as a priority than the next-closest item.

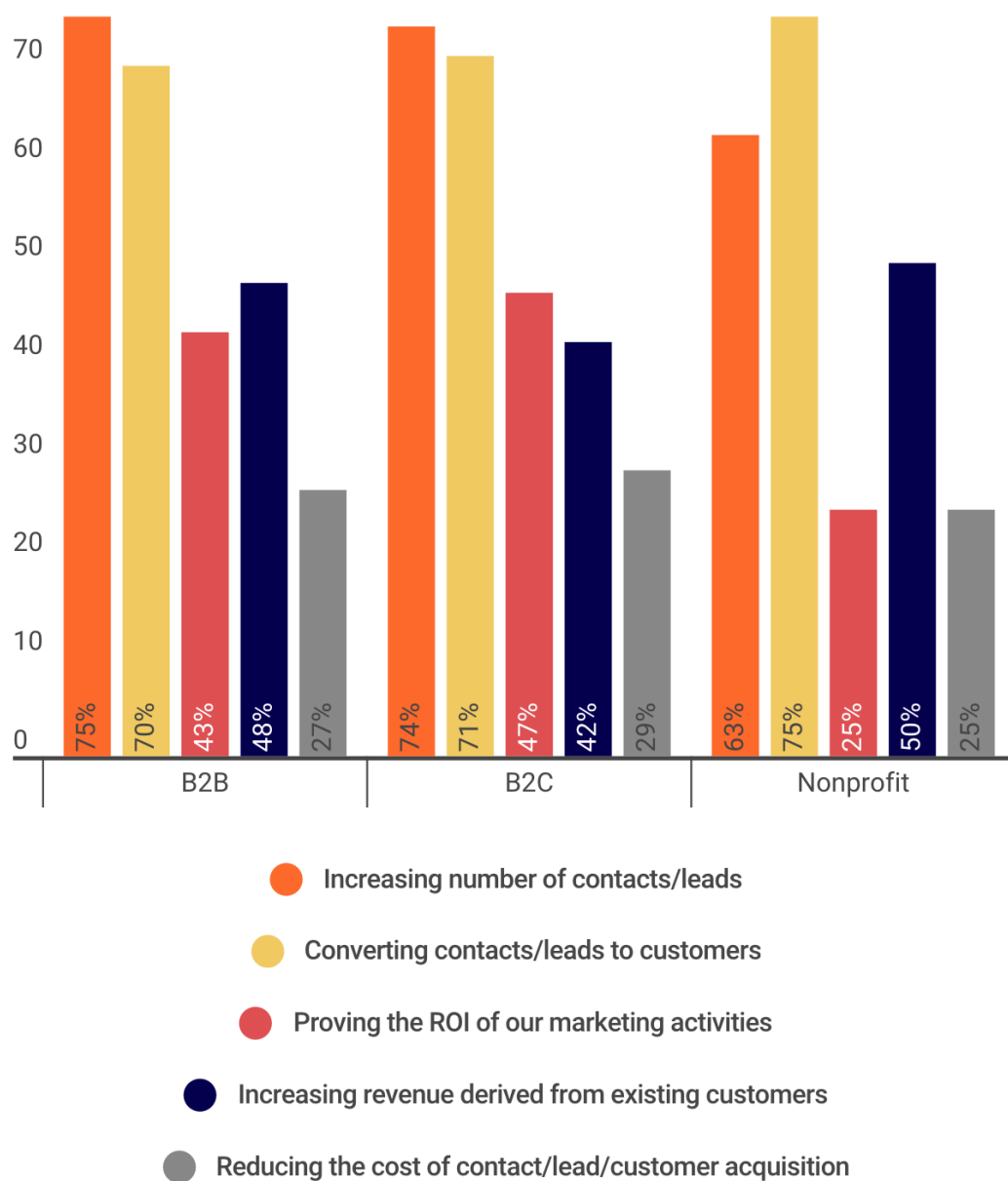
Top Priorities by Company Size

Increasing leads and converting them are top priorities for both SMBs and enterprise companies



Top Priorities by Company Type

Regardless of clients or mission, increasing and converting leads is paramount for 2015 marketers



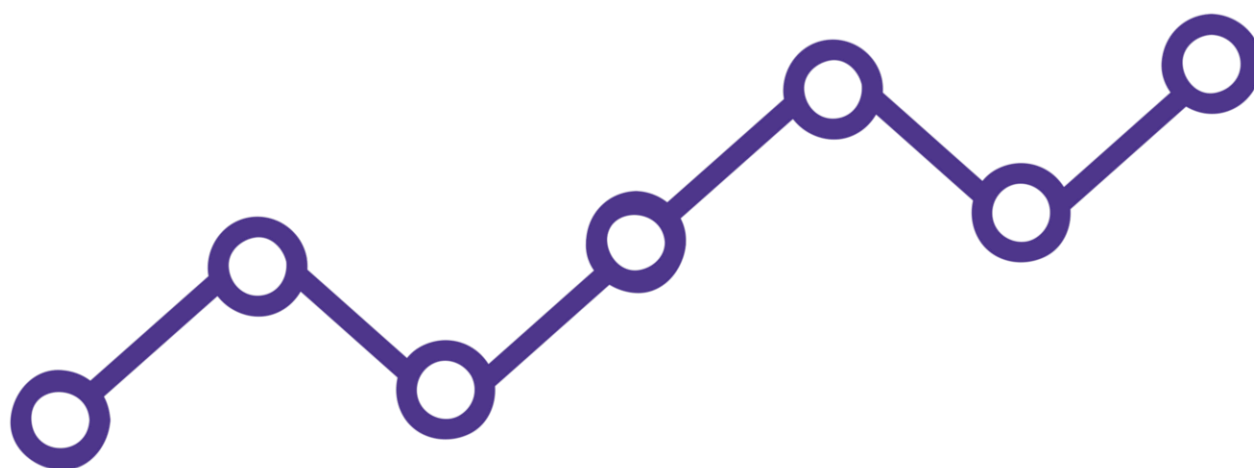
Demonstrating ROI is the #1 challenge marketers in Asia are facing

Proving a demonstrable return on marketing dollars was the most cited challenge across SMBs and all different company types, and securing more budget to allocate toward ROI-generating activities was next in line. Being able to measure the success of marketing can be correlated with budget – in order to secure enough budget, marketers need to be able to demonstrate their strategy is working.

Other challenges rank higher in Asia than globally, such as targeting content for an international audience and hiring top talent. This differs from global responses, where we saw managing a website and identifying the right technologies for their needs as the prevalent third and fourth biggest challenge.

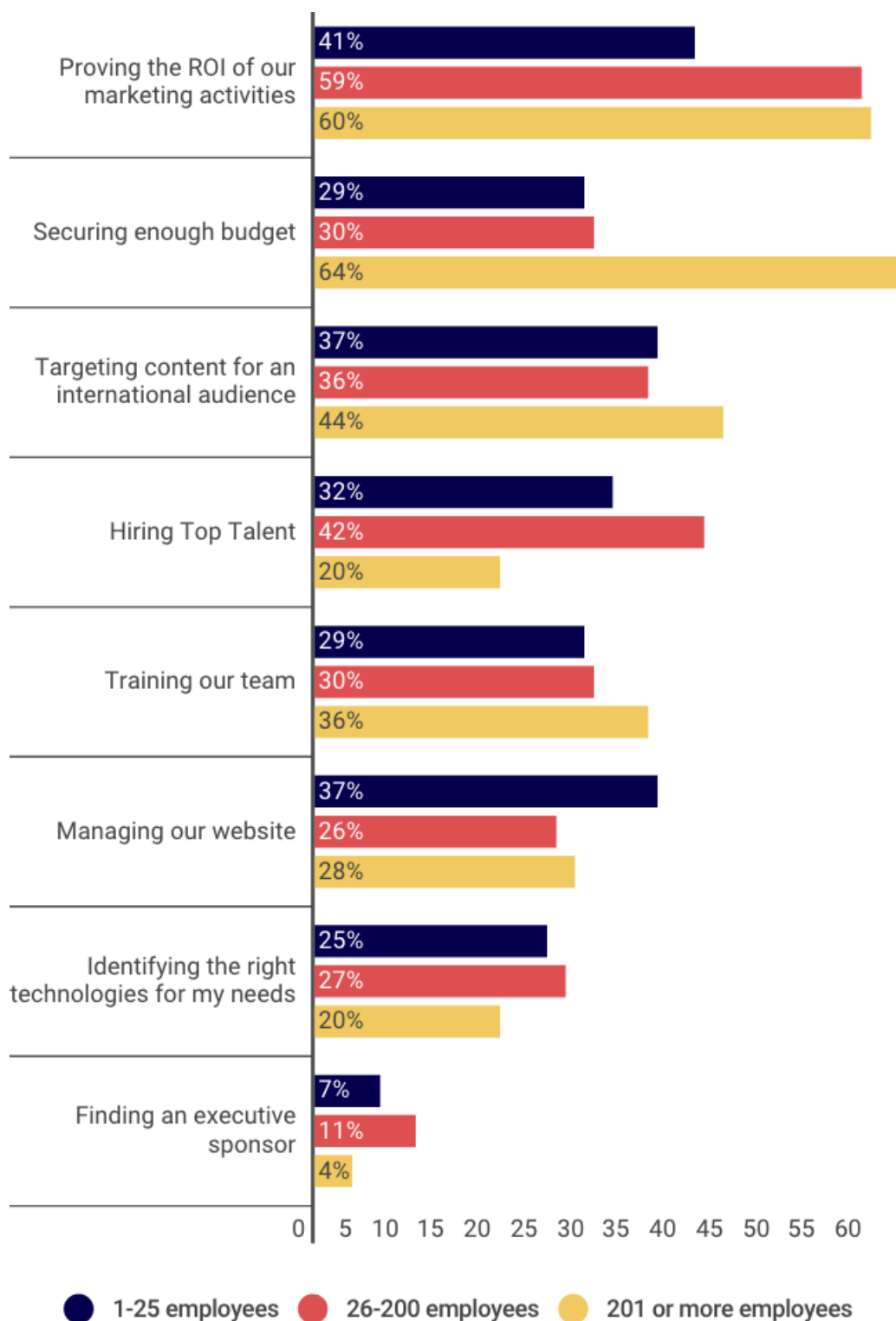
This highlights the different challenges marketers in Asia face. International marketing is often the norm (with companies often selling into other markets such as the United States and Europe as well as Asia), content creation for an international audience becomes, understandably, a big challenge.

There is a comparative [lack of top talent](#) in the field of digital marketing in Asia, according to the Digital Knowledge Survey 2014. This may be partly responsible for why hiring top talent is a top challenge for marketers in Asia. With a smaller pool of applicants to choose from, hiring can be ultra-competitive and be a concern for marketers looking to grow their teams and ROI.



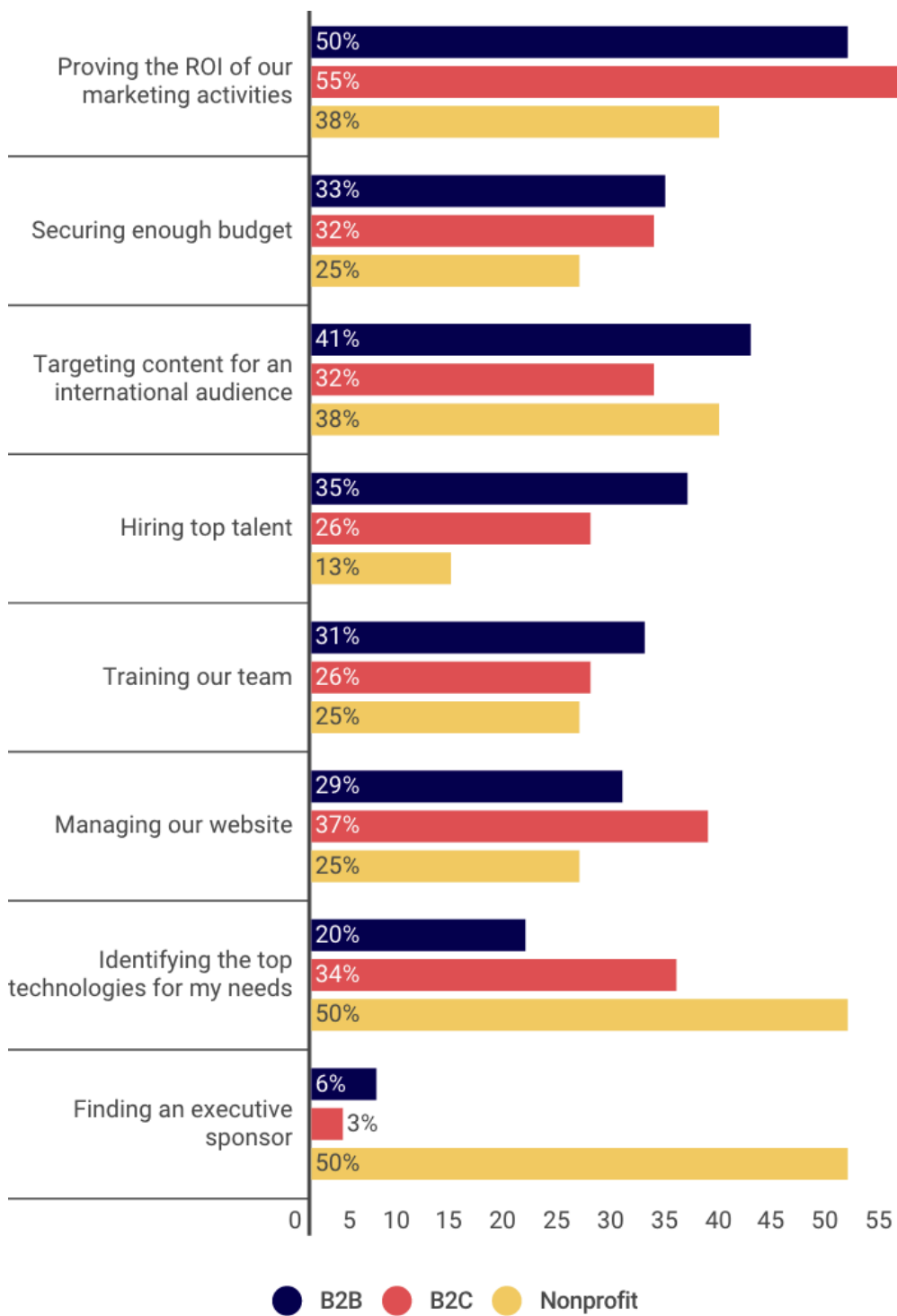
Top Challenges by Company Size

Proving ROI and subsequently securing more budget are marketers' biggest roadblocks



Top Priorities by Company Type

Proving ROI is a big concern for the for-profit sector, while non-profits struggle most with identifying the right technologies for their needs and finding an executive sponsor



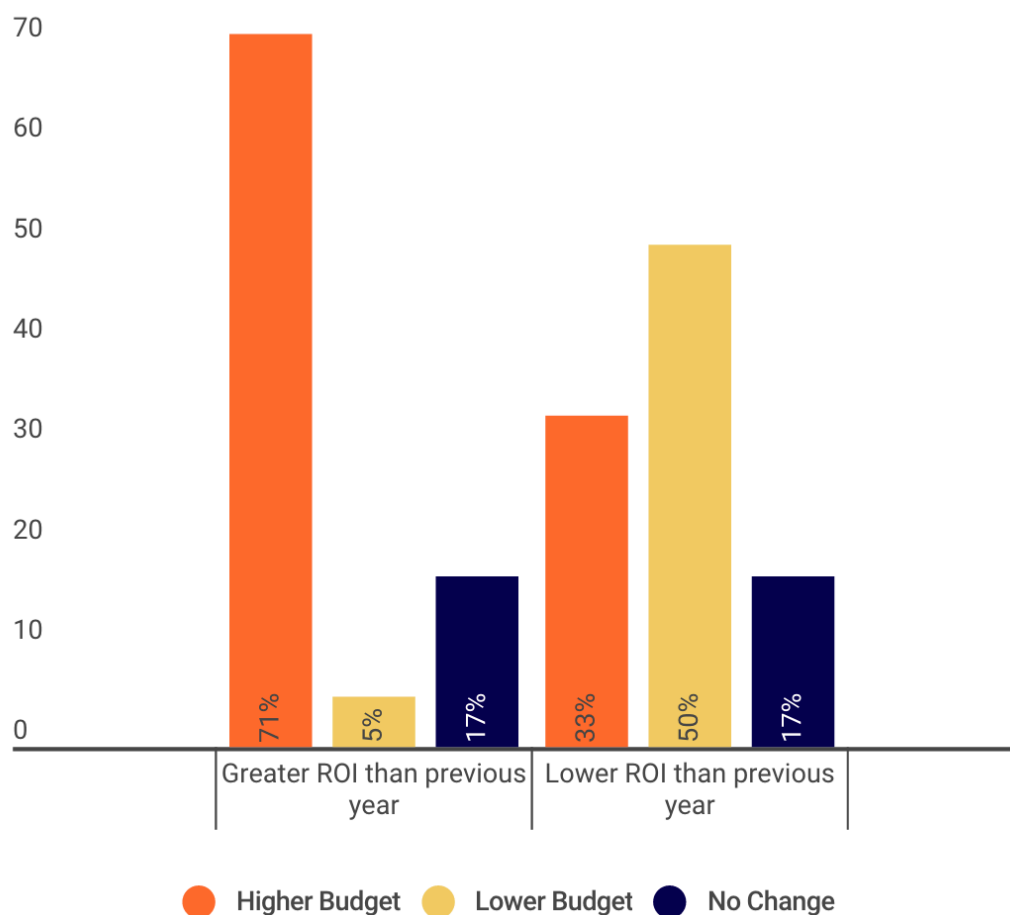
Proven ROI? Hello, budget

What did all survey respondents for the State of Inbound Asia have in common? Everyone wants more budget.

As it turns out, the key to securing more money for your team might not be that complex. Respondents whose teams demonstrated positive marketing ROI in 2015 were more than twice as likely to receive higher budget. The takeaway is clear: get a positive return on this year's investment and watch next year's budget increase.

2015 Budget by ROI

Proving ROI gets you more budget. Period.



The converse is an even stronger point: Demonstrating a negative ROI the previous year meant you were 10 times more likely to see a lower budget for the new year.

The key here – as we'll explore in the “Best-in Class Marketing Practices” chapter – is to track ROI in the first place in order to prove ROI and justify a budget increase.

No ROI tracking = no demonstrable ROI. No ROI means no budget.



CHAPTER 2

EMERGING

trends

In Asia, inbound marketing is getting more traction. The majority of companies surveyed use inbound tactics such as SEO, social media, website optimisation and marketing automation. These companies are also seeing higher ROI on average than their counterparts who are relying mostly on traditional outbound tactics such as paid advertising and direct mail.

Along with more predictable trends in the landscape, we found some interesting insights that might raise some eyebrows, too:

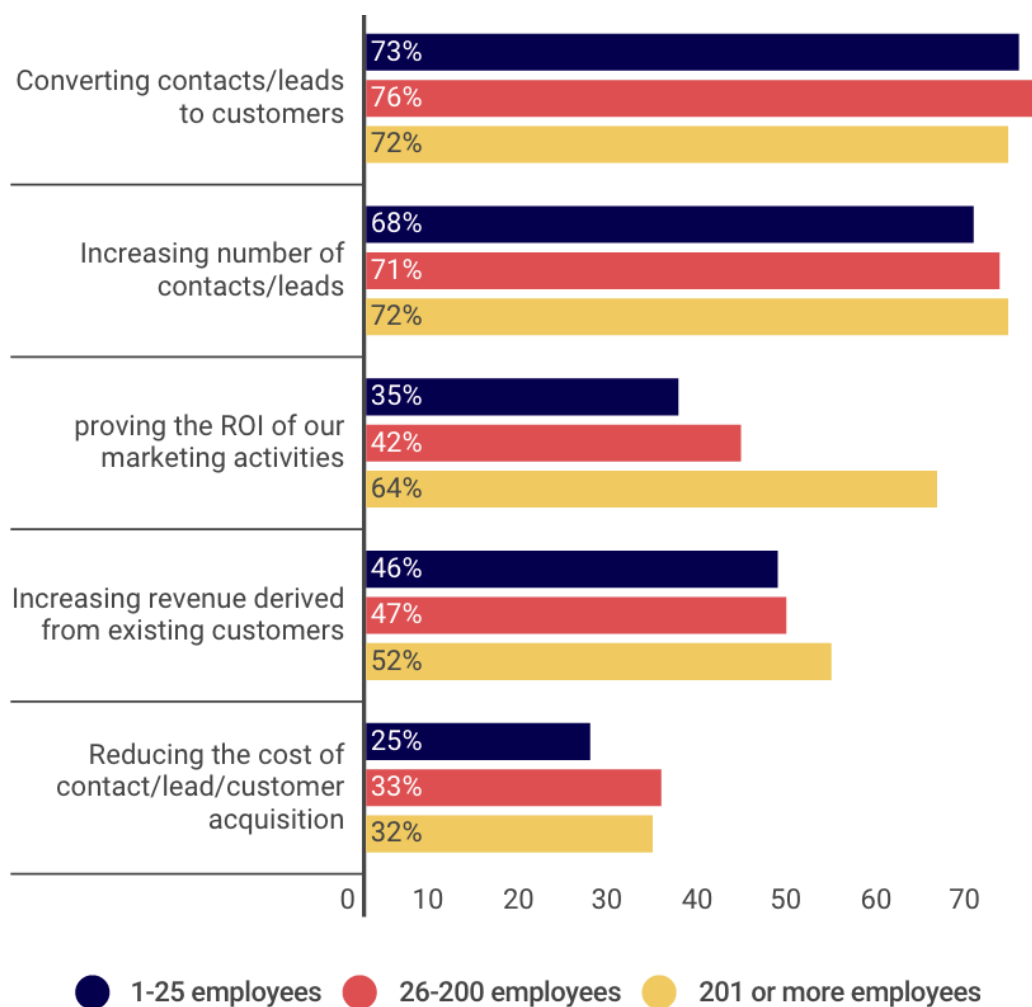
- Companies are worried about increasing leads and conversions, but not the cost of doing so.
- While content strategy still ranks as a top inbound marketing priority, nearly 70% of respondents stated that growing their SEO/organic presence was the most important tactic, which means **growing traffic** is top-of-mind.
- While marketers still create nearly 70% of their content in-house, a surprising amount of content comes from other sources such as executives, freelancers and agencies.

Companies want to generate more leads/customers but aren't prioritising reducing cost per lead/customer

Interestingly, while increasing leads and conversion rates are top priorities, the lowest priority across all company sizes and sectors is reducing the cost of accomplishing these two objectives. This could mean many marketers aren't paying as much attention to the efficiency of their marketing all the way down the funnel, which can lead to having a harder time proving ROI, which more marketers than not cite proving ROI as their #1 challenge.

Top Priorities by Company Size

Reducing cost of acquiring leads/customers is 3x less likely to be prioritised as increasing the number of leads/customers

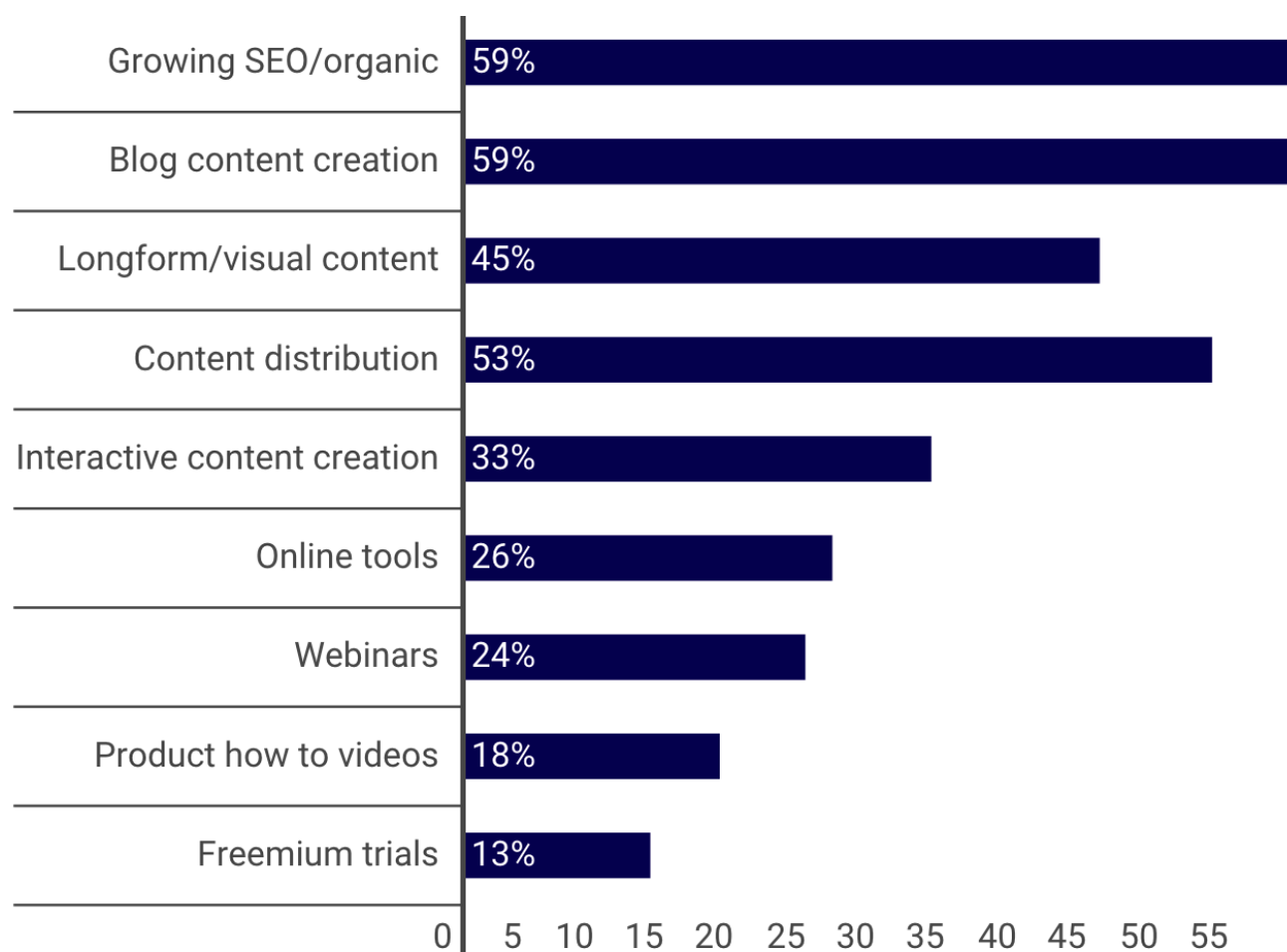


Content is key to grow organic reach

We asked marketers in Asia what inbound marketing activities they were devoting more of their time and resources to. Blogging and growing SEO/organic presence was the top priority. SEO, especially on your blog, helps increase traffic to your website and is vital to building a strong online presence. Marketers now understand optimising their website and content for SEO is paramount to success.

Inbound Marketing Projects That Are Top Priority

Improving organic reach through SEO and content are top priorities for marketers



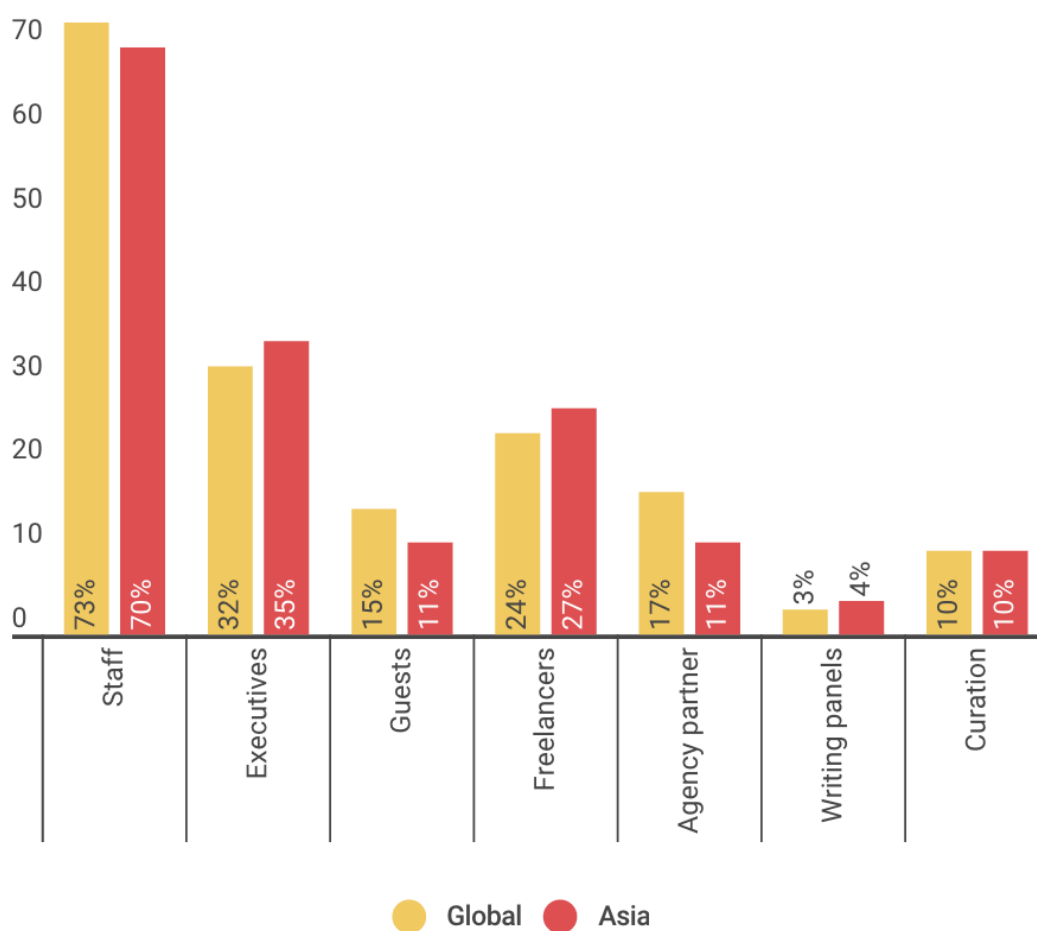
Marketers around the world create content mostly in-house but use other sources, too

Content creation is the foundation of inbound marketing, but it can take a while. **Over 50% of respondents said it took them 1-3 hours to write a 500 word blog post**, while a quarter reported that it took them more than four hours per post. While 1-3 hours isn't too long for most, for marketers taking longer or those with too much on their plate and not enough time to write all their content in-house, there are many options for sourcing quality content.

We found that while marketers still sourced most of their content via company staff, they supplemented that with other sources such as executives, getting guest bloggers, and hiring freelancers or marketing agencies.

Content Creation Sources Globally and in Asia

In Asia and globally, marketers are supplementing in-house content creation with sources such as their executives, guest writers, and freelancers to keep up publishing momentum



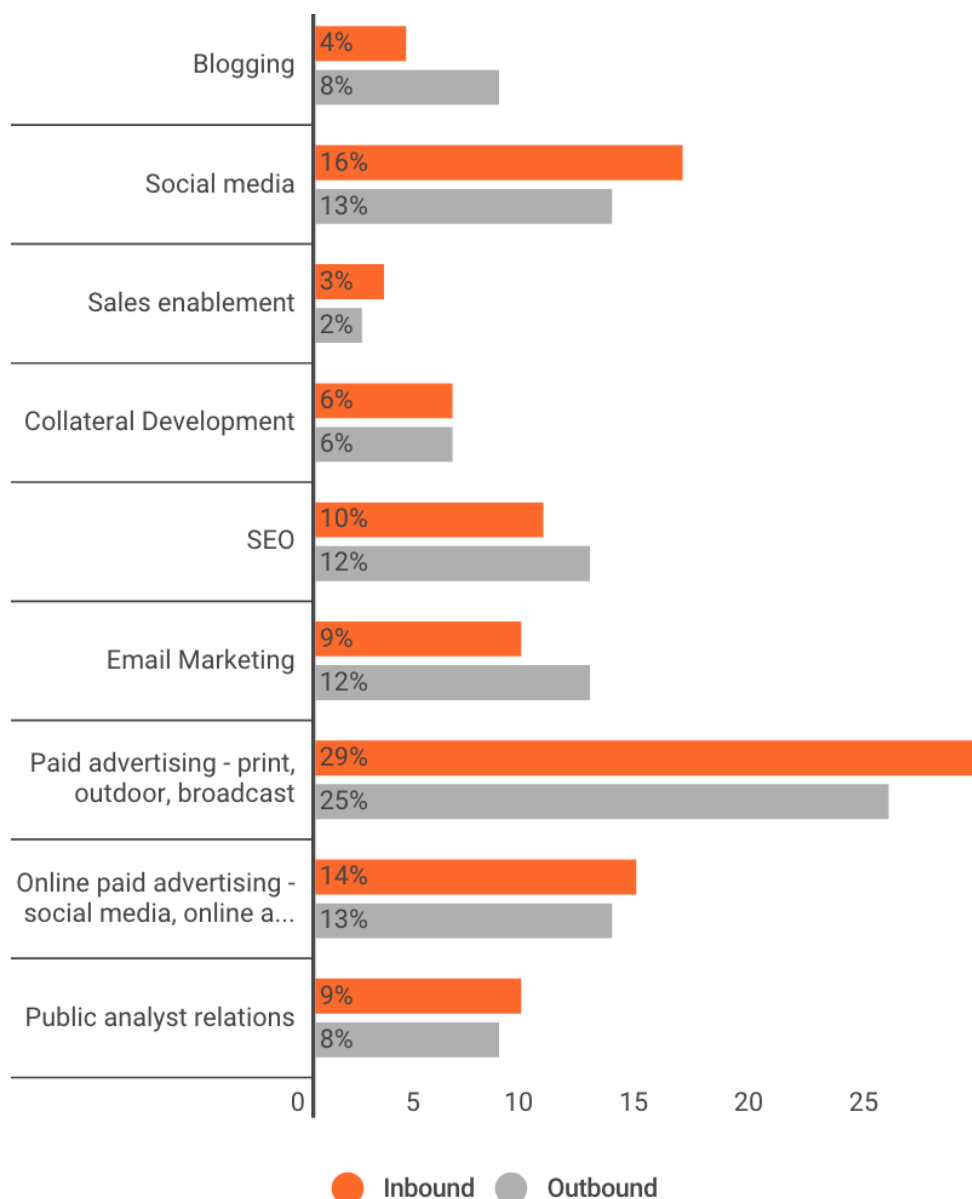
Even people using outbound think it's a waste

Sure, we here at HubSpot, our customers, and anyone else who's discovered the effects of inbound marketing will say that paid advertising (i.e. print ads, TV, buying email lists) is a poor investment. Indeed, of respondents whose companies favor inbound marketing, over 40% more named traditional advertising as the most overrated marketing tactic than the next-closest item. But guess who else thinks the same?

The people paying for print, TV, and billboard ads.

The Most Overrated Marketing Tactic

Both inbound and outbound marketers stated traditional paid as the most overrated tactic

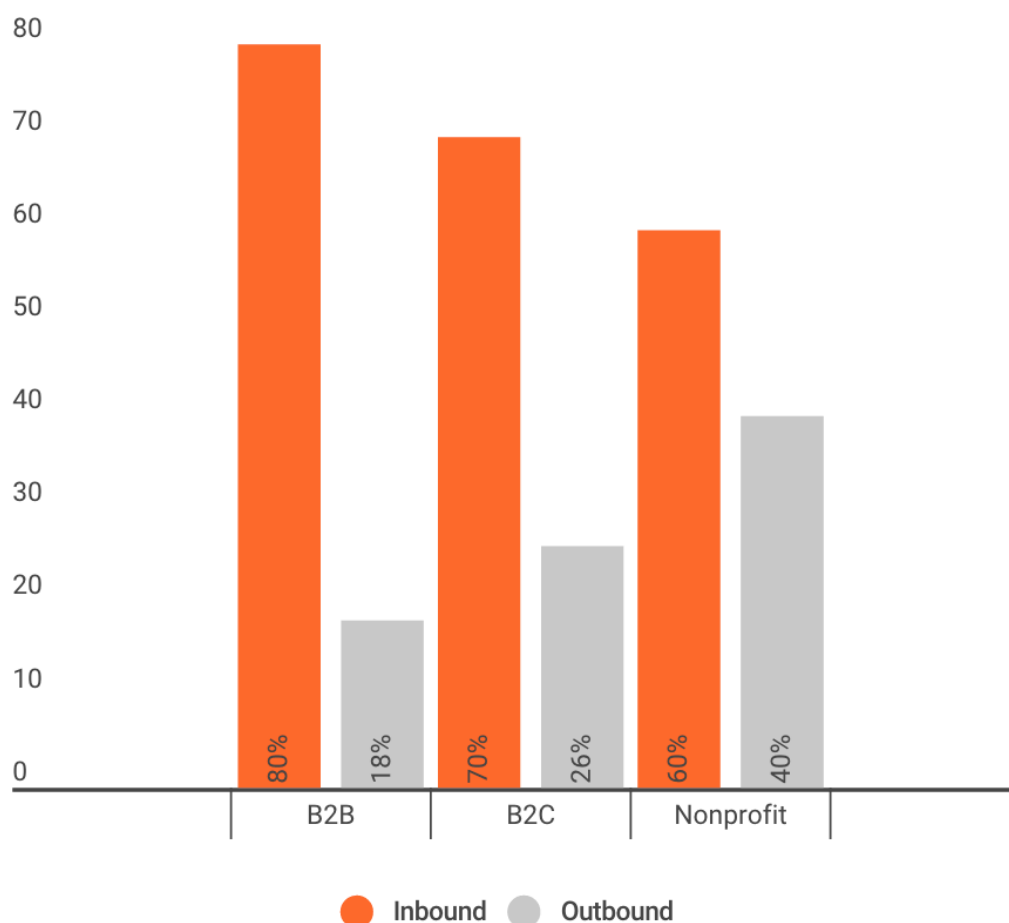


Inbound works for B2B, B2C, and nonprofit

Think inbound marketing isn't for you? Guess again. Of the nearly 400 people we surveyed, inbound had a 70% likelihood of being the marketing approach of choice, while outbound had only a 25% chance. Overall, B2B companies overwhelmingly preferred inbound tactics, while even B2C marketers were over 2.5x more likely to choose inbound. The gap was closer for nonprofit, which has a slightly different marketing model.

Inbound Works for Every Company Type

Inbound marketing tactics are overwhelmingly favored by all sectors



Senior Executives and VPs/directors favour inbound more than managers or individual contributors

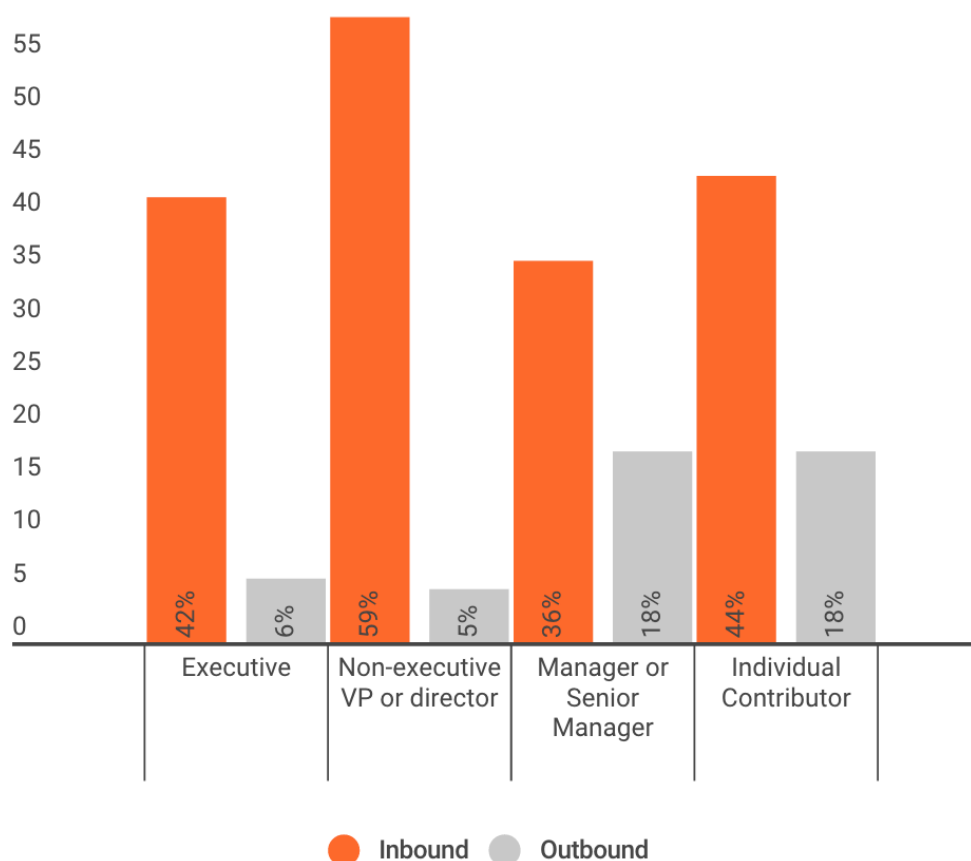
Our data showed that the farther you advance in your company, the more likely it is you'll favour inbound approaches. While all levels showed a clear preference for inbound, there was a higher amount of relative favour of outbound among managers or senior managers and individual contributors.

What's interesting is that **Asia has the highest perception of inbound strategy ROI** of any region globally – the global average actually showed a much more even spread between preferences for inbound vs. outbound, and managers or senior managers were 43% in favour of outbound marketing while only 37% were in favour of inbound.

This is great news for marketers in Asia – higher value placed on newer marketing tactics such as inbound marketing allows greater control over digital ROI.

Strategy ROI Perception by Position Level in Asia

All levels perceived higher ROI in inbound, but senior managers and below were more likely to favor outbound tactics



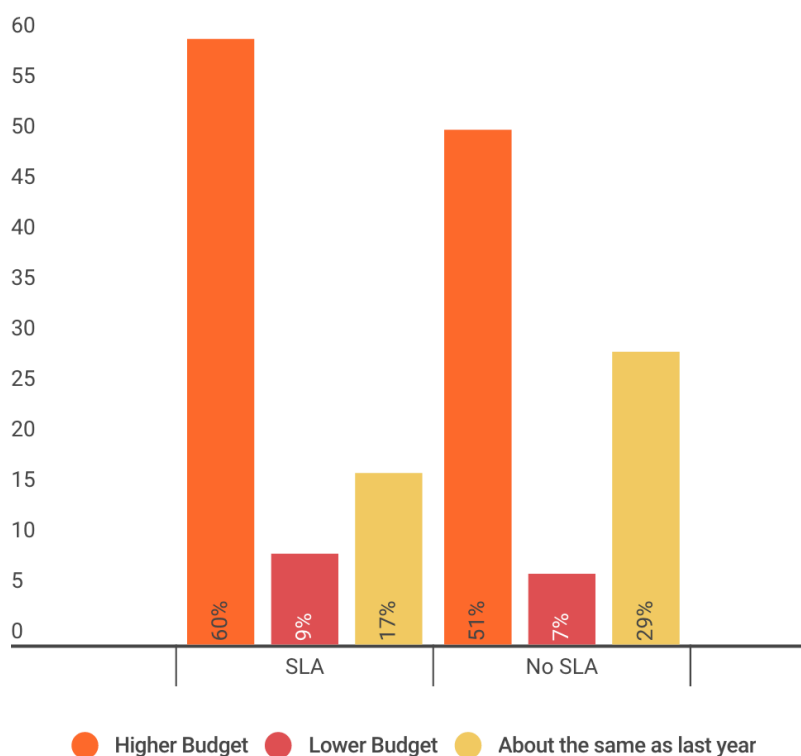
Sales and marketing are not aligned

While globally, we found that having a service-level agreement (SLA) between sales and marketing correlated with higher ROI, a higher budget, and positive sales team hiring patterns, we found that the presence of an SLA did not positively correlate with the abovementioned variables.

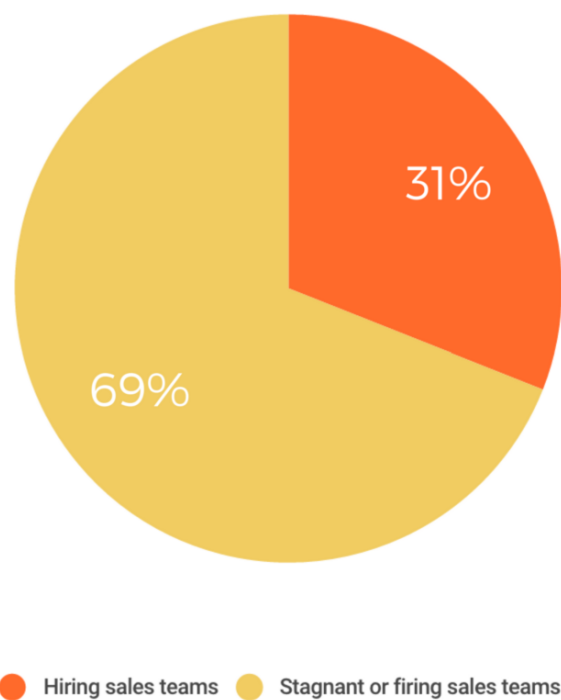
Marketers with an SLA actually reported a slightly *lower ROI* than those without one. Interestingly, while having an SLA increased the likelihood of securing a larger budget by only a little over 8%, *not* having an SLA resulted in much more likelihood in budget not increasing.

We also found that marketers overwhelmingly worked in businesses where sales teams were over twice as likely to be stagnant or firing team members than be hiring new salespeople. From these trends, we can gather that Asian marketers in particular are struggling with sales and marketing alignment and that it goes beyond just having an SLA in place – shifting business patterns and lack of proper technology that enables marketing and sales to communicate metrics could be two contributing factors.

Existence of SLA by Budget



Sales Teams Hiring Patterns





CHAPTER 3

BEST-IN-CLASS *marketing practices*

At this point, we've seen some surprises, and we've also seen areas of steady logical progress. In addition, we know what everyone wants – **more ROI, more leads and conversions, and more budget**. But what does best-in-class marketing look like?

We cross-analysed respondents' marketing spend, preference for inbound vs. outbound tactics, and ROI with their challenges, priorities, and marketing behaviors to find those correlations which point to success. By identifying which factors lead to greater ROI, we are able to provide ideas that you can use for your own marketing strategy.

Let's dive into what the companies with the highest return on their marketing dollars are doing:

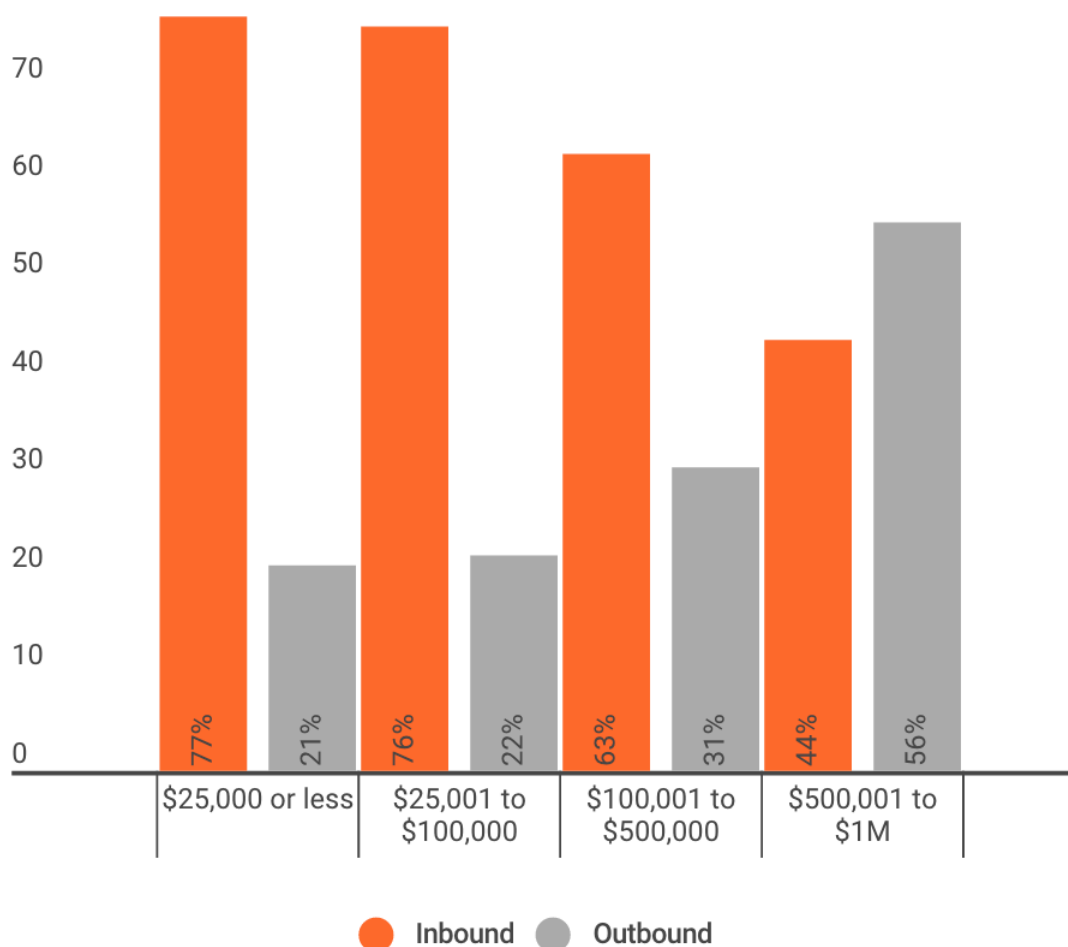
- Larger companies with budgets over \$500,000 a year still lean towards outbound marketing as their primary strategy. While **inbound marketing hasn't caught on as strongly with enterprise**, SMBs with budgets lower than \$500,000 overwhelmingly utilise inbound marketing strategy.
- Leading marketers resist the allure of paid campaigns and recognise outbound as being overrated.
- Best-in-class marketers check their marketing analytics daily as well as track ROI, prove it's growing each year, and secure increased budget as a result.
- Past success with inbound marketing is the single-biggest factor that drives budget increases.
- Both staff and guest contributors write marketing content, increasing quality and quantity without using up all a marketer's time

The best marketers make their dollars go further

Inbound is the preferred marketing method for all companies that spend less than \$500,000 annually on marketing. In fact, if your organisation spends less than \$100,000 on marketing annually, you're up to four times more likely to practice inbound than outbound.

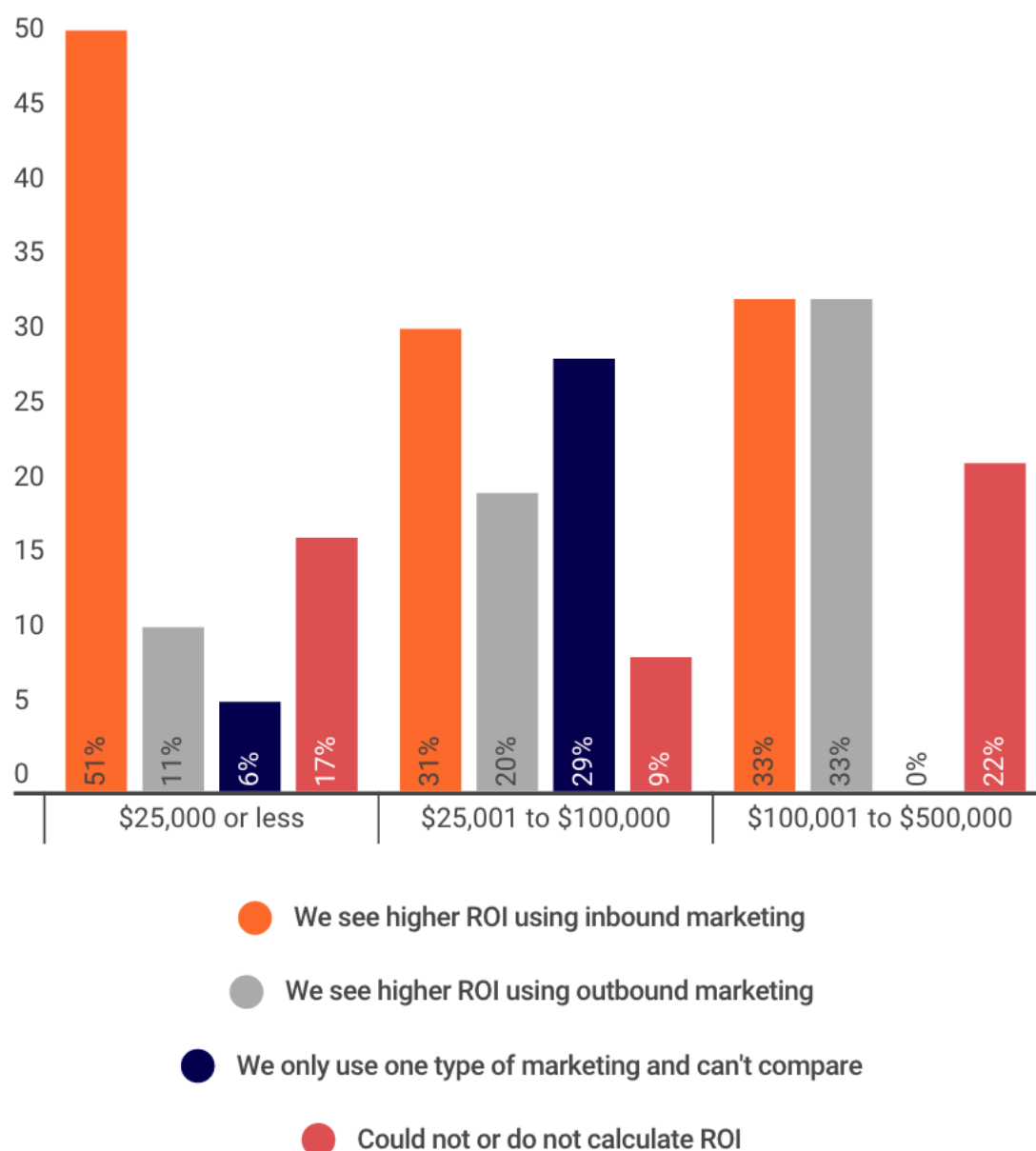
Inbound vs. Outbound by Annual Marketing Spend

Companies with budgets under \$500,000 are more than twice as likely to use inbound strategy



Inbound vs Outbound ROI by Annual Marketing Spend

As marketing spend grows, companies are more likely to see comparable ROI for inbound and outbound tactics.



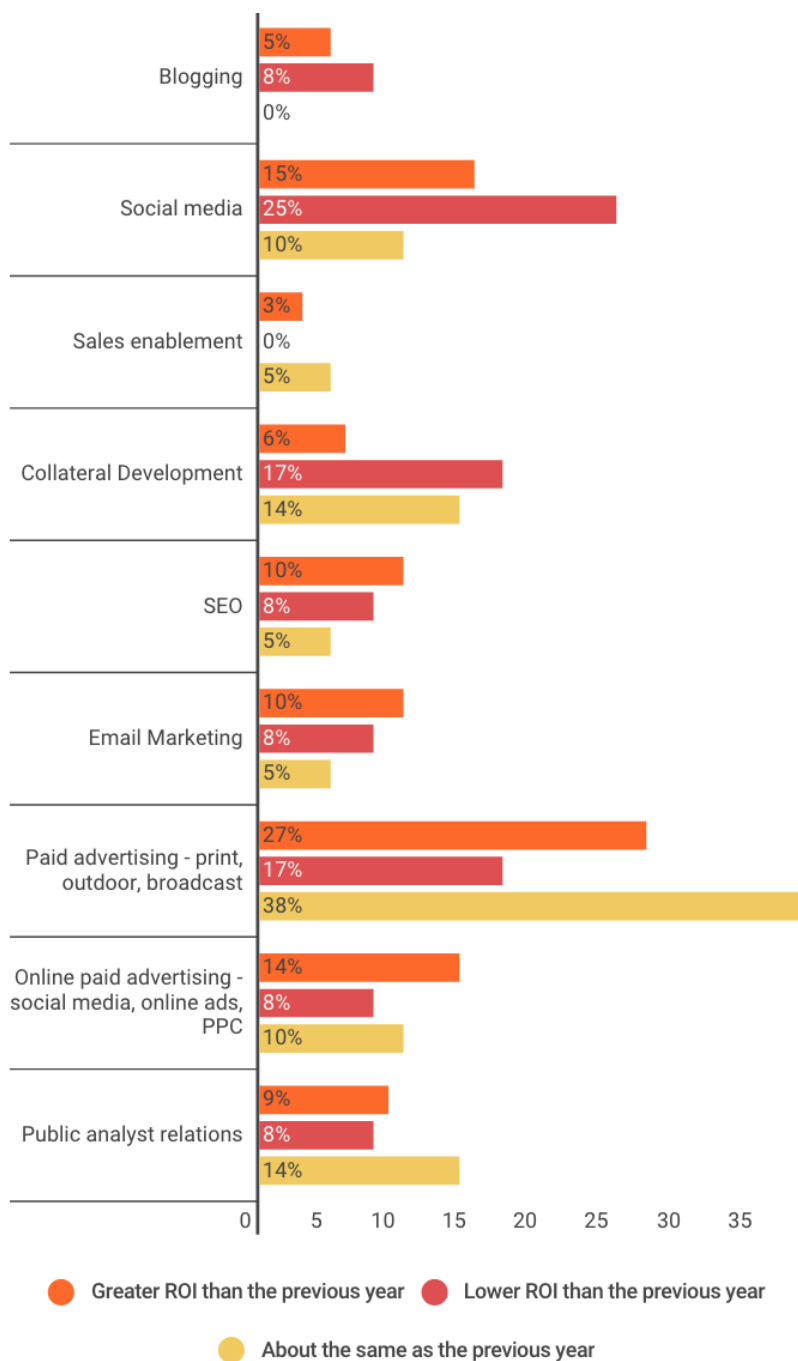
Companies seeing ROI from outbound as budget increases isn't as surprising, because they are able to pay for immediate results and are devoting less resources to inbound.

Leading marketers take outbound with a grain of salt

In many ways, our data showed that outbound lives in inbound's shadow. Companies with greater ROI than the previous year cited paid as the most overrated tactic by far, choosing to focus on inbound strategy to drive results instead.

Most Overrated Marketing Tactic by ROI

Outbound tactics such as paid were the most overrated marketing tactic regardless of ROI



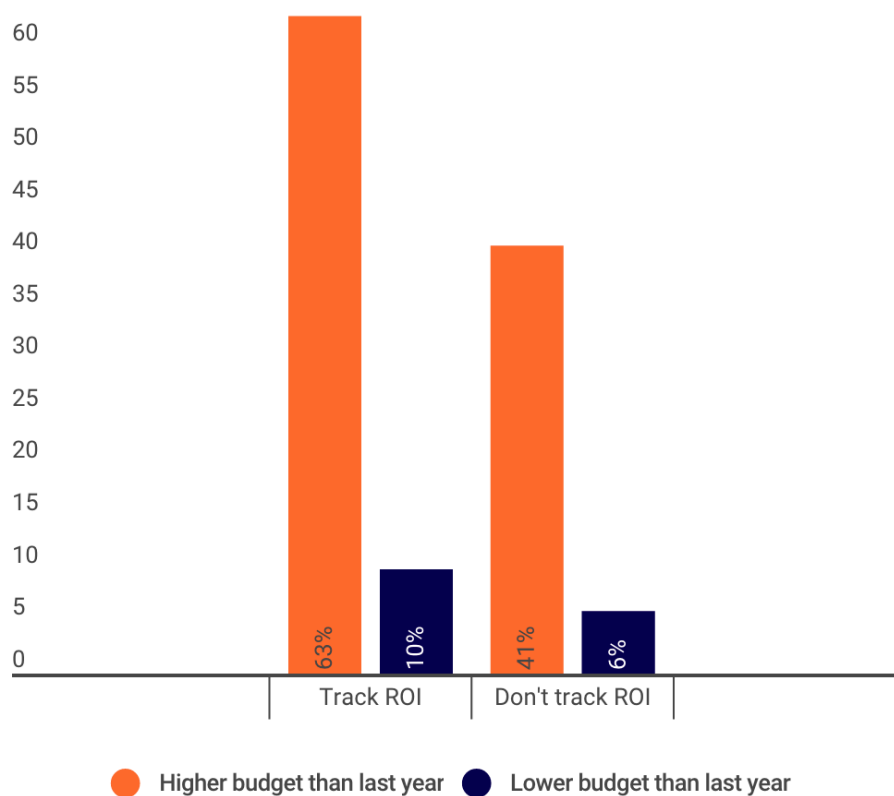
Best-in-class marketers track ROI, prove success, and reap the rewards

Best-in-class companies get increased marketing budgets, and they do it by proving their teams are worth the increase in cash. How? By tracking the returns year-over-year, and subsequently demonstrating a positive ROI.

Respondents were 50% more likely to receive a higher budget in 2015 if ROI was tracked in the first place, and over twice as likely to see an increased budget if that tracked ROI was shown to be higher than in 2014. What's more, respondents were 10 times more likely to receive a *lower* budget if they failed to demonstrate a positive ROI.

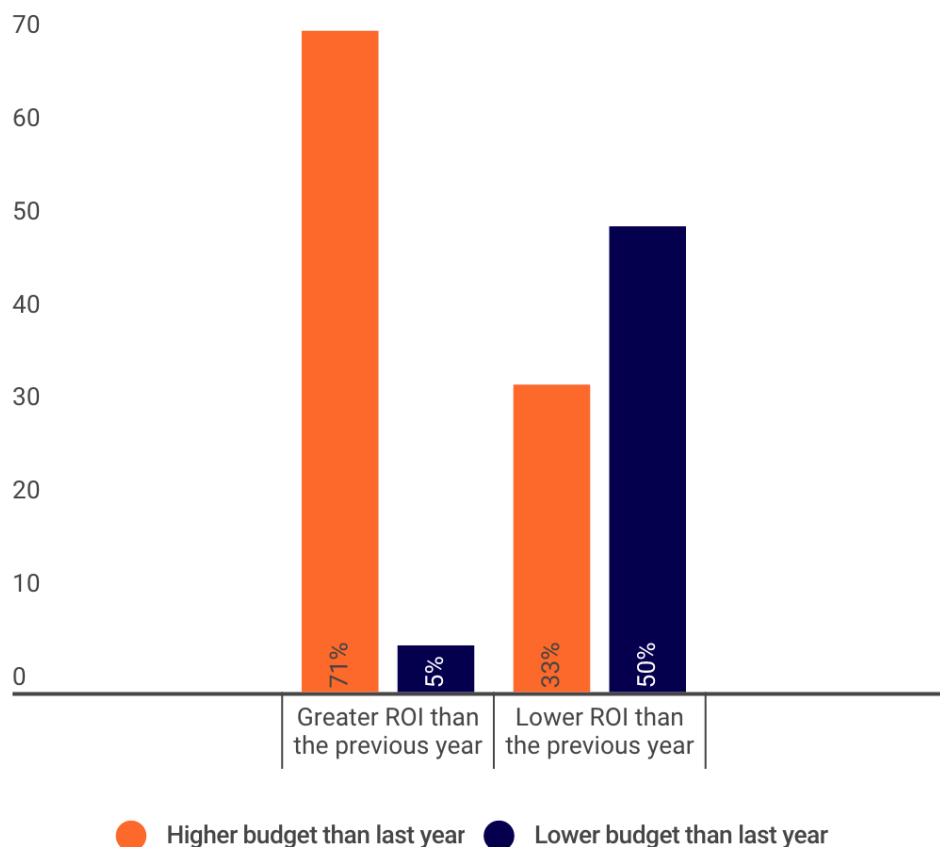
2015 Budget by ROI Tracking

Tracking ROI correlates with securing budget



2015 Budget by ROI

Demonstrating positive ROI on marketing spend brings in budget



Leading marketers let results drive decisions

We asked our respondents to identify the factors that caused a change to their inbound budget. Most had multiple factors that contributed to the change in budget, but the highest-cited reason for an increase in budget was past success with inbound marketing.

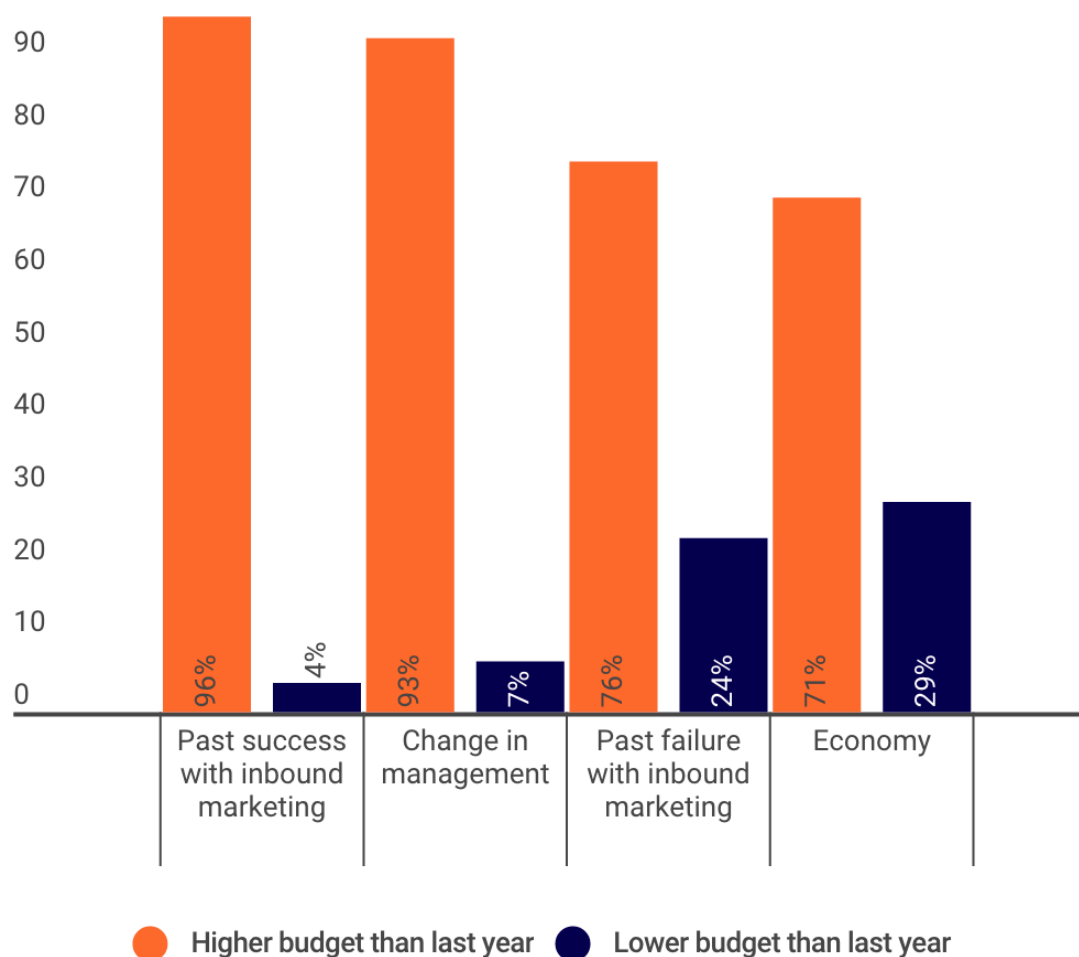
Higher budget is next highest-correlated with a change in management – suggesting that often-times companies are hiring management that has a more forward-thinking strategy that involves inbound, thus increasing inbound budget. Change in the economy was also a major reason for either a rise or drop in budget.

It's interesting to note that while likeliness increased of a lower budget as a result of past failure with inbound marketing, marketers overall still received a higher budget, perhaps suggesting an attitude towards treating inbound as an investment worth trying to improve instead of cutting back on spend.

The takeaway here is that while there are external factors such as changes in the economy or in management that can play into whether marketing budget goes up or down, ultimately being able to prove positive ROI is something marketers have complete control over.

2015 Budget by Budget Change Factors

Past success with inbound marketing is the best way to secure a higher budget

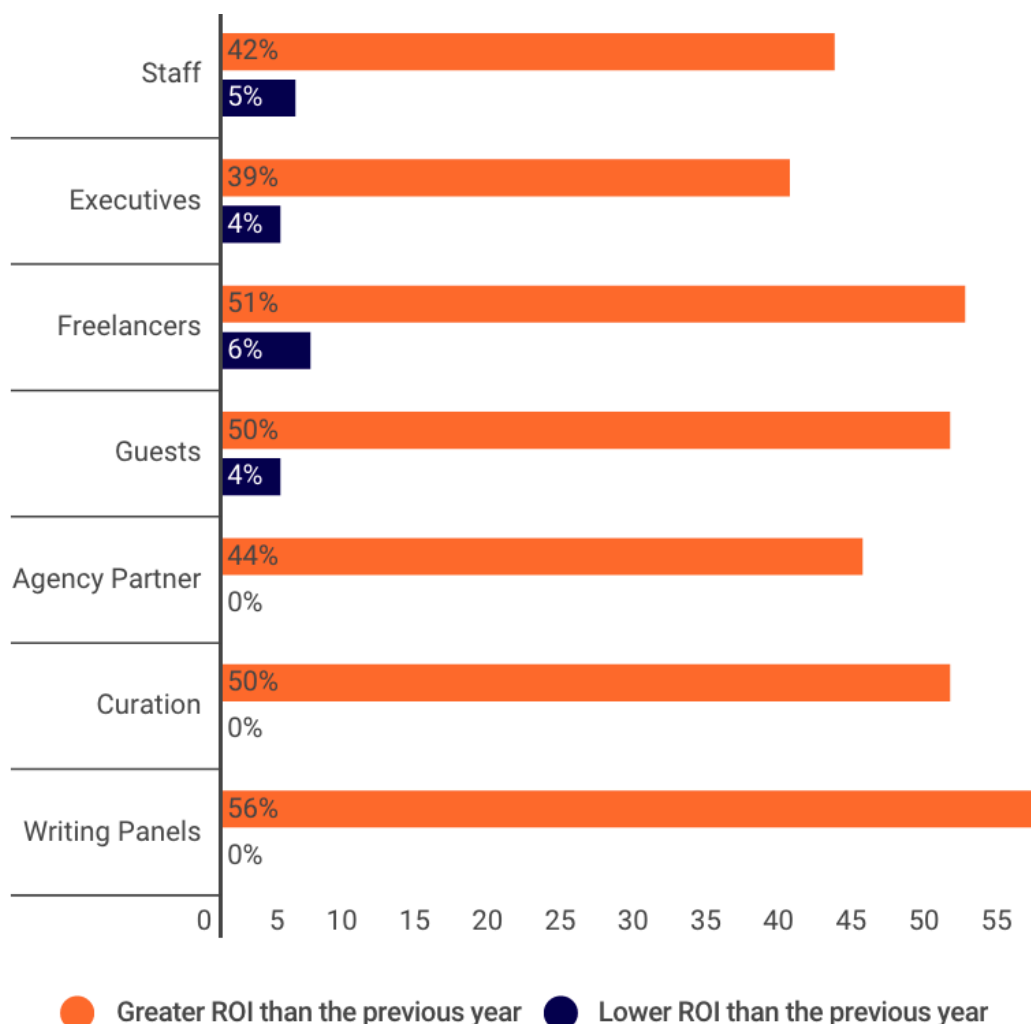


High-ROI marketers' content comes from in-house and other sources

The most successful marketing organisations launch a balanced attack on churning out compelling content. In particular, organisations that saw an increase in ROI from 2014 to 2015 were more likely to employ both staff writers and guest contributors in their content creation efforts than their less successful peers.

Content Creation Sources by ROI

Companies with lower ROI call on fewer guest bloggers and staff writers



Successful marketers check their analytics frequently

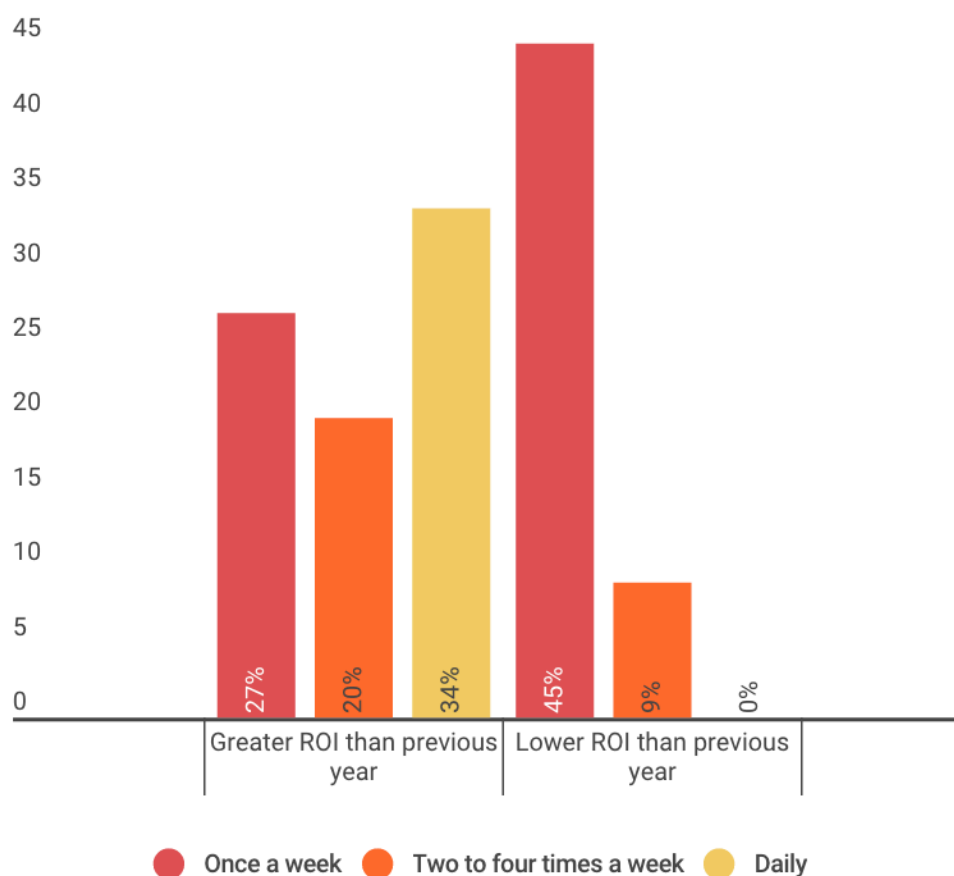
You may have heard the phrase “what gets measured gets managed”, but is it true?

According to our data, it is. Respondents who achieved greater ROI in 2015 than in the previous year were overall 50% more likely to check their marketing campaigns.

And it turns out that frequency matters – marketers who check their analytics daily are in the group most likely to achieve greater ROI. In fact, marketers who only checked their analytics once a week were nearly twice as likely to see a negative ROI.

How Often Do You Check Marketing Analytics?

Checking marketing analytics more often increases likeliness of higher ROI



Top marketers use marketing automation software

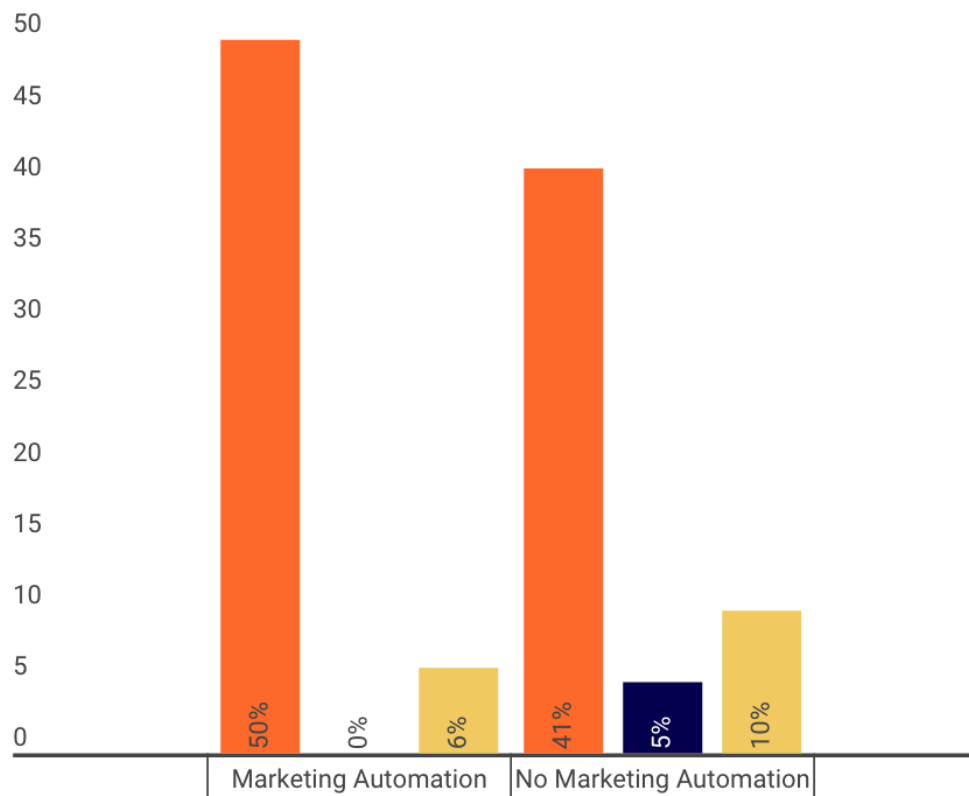
The main tool in top marketers' arsenals is a platform for automating their team's marketing efforts. While our respondents indicated using an array of specific products, the larger trend was telling: the marketers at the top use marketing automation software in some form or another.

Specifically, those who saw a higher marketing ROI in 2014 were more likely to have used marketing automation software than not. Marketers *not* using marketing automation were more likely to see their budget decrease or stay the same.

In addition, those same respondents were more likely to see budget increase as a result, and had an extremely low chance of receiving a lower budget.

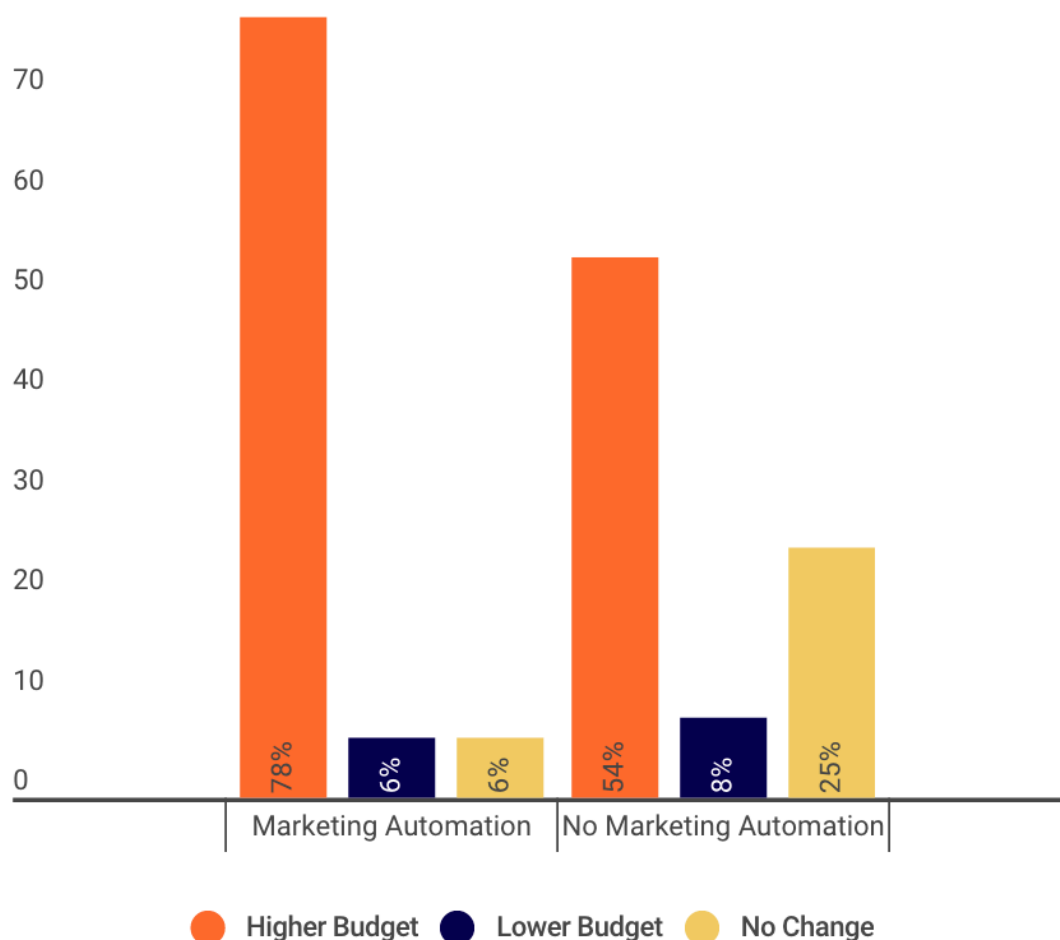
Marketing Automation Software Use by ROI

Marketing automation systems help marketers achieve ROI



Marketing Automation Software Use by Budget

Marketing automation software users have very little chance of receiving a lower budget

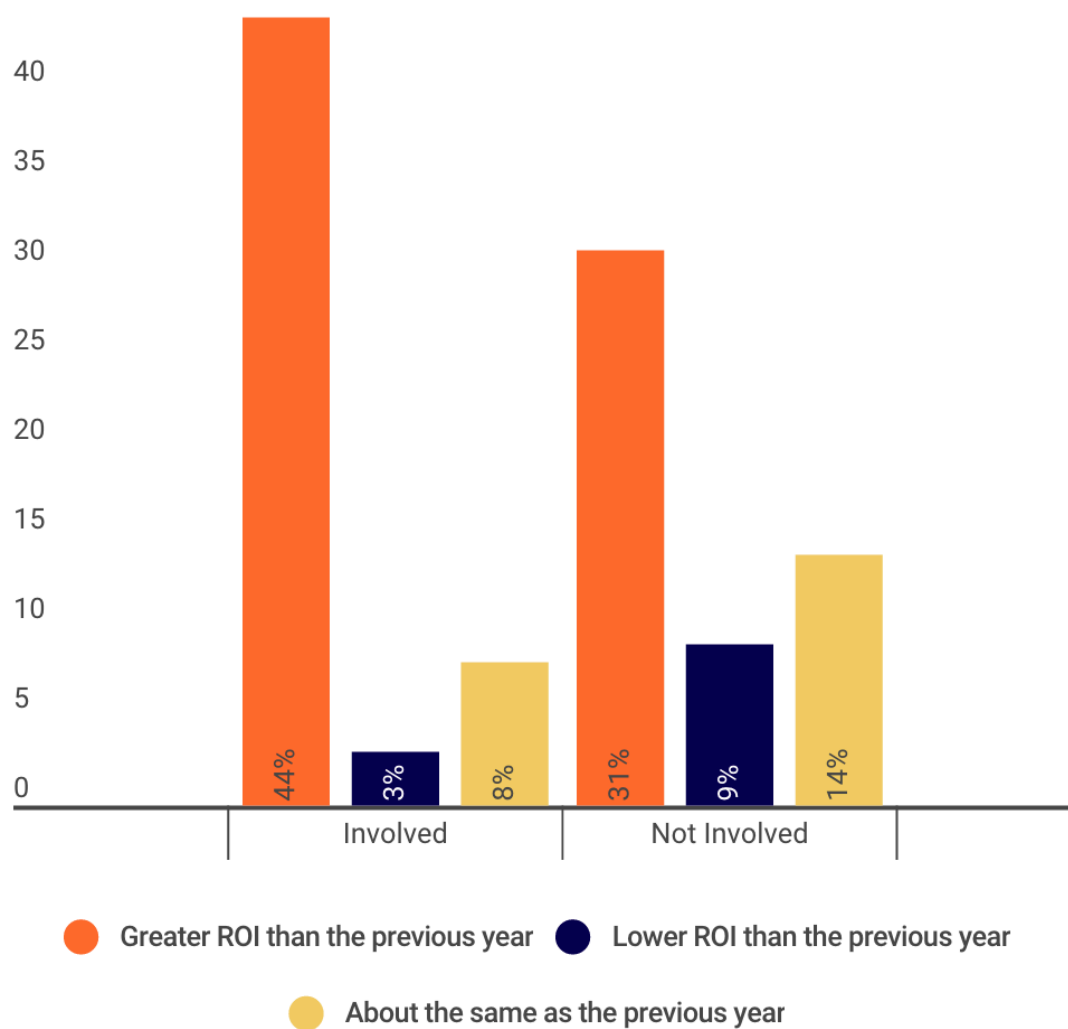


Exemplary marketers are involved in sales software purchase decisions

Using marketing automation software increases a marketer's chances for success. And when marketing and sales loop each other in to software purchase decisions (for both CRM systems and marketing automation tools alike), the odds are even better. Marketers who were involved with sales software selection were 14% more likely to see a positive ROI.

Marketing's Involvement in Sales Software Decisions by ROI

Sales and marketing alignment pays off in ROI



A person is sitting on a couch, holding a tablet. The image is overlaid with a warm orange color. The text 'CHAPTER 4' is written in white, with the number '4' inside a speech bubble icon.

CHAPTER 4

global INBOUND TRENDS

While most of this report focuses on data and trends from only Asia, this report wouldn't be complete without a global outlook.

The State of Inbound survey doubled down on international data this year – with respondents from 130 countries, there's some rich information to share and learn from. In this final section, we've compared some key data from Asia to the global average gathered from our survey. Hopefully, you are able to get insight into where Asia stands as a region for various parts of the marketing landscape and use the global stats as a secondary benchmark for your inbound strategy.

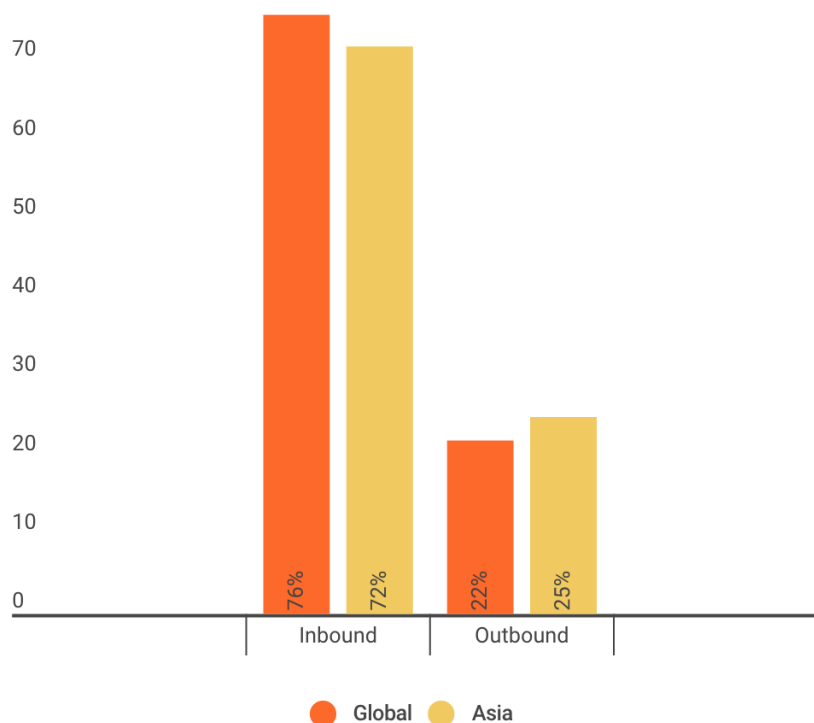
The world is on inbound

One thing's for sure: The global community is united in their favor of inbound practices. In all give international regions, three times as many marketers consider their organisation inbound-driven versus outbound driven.

However, **Asia pacific has a slightly lower adoption of inbound** compared to other regions and is the most likely to use outbound marketing of any region.

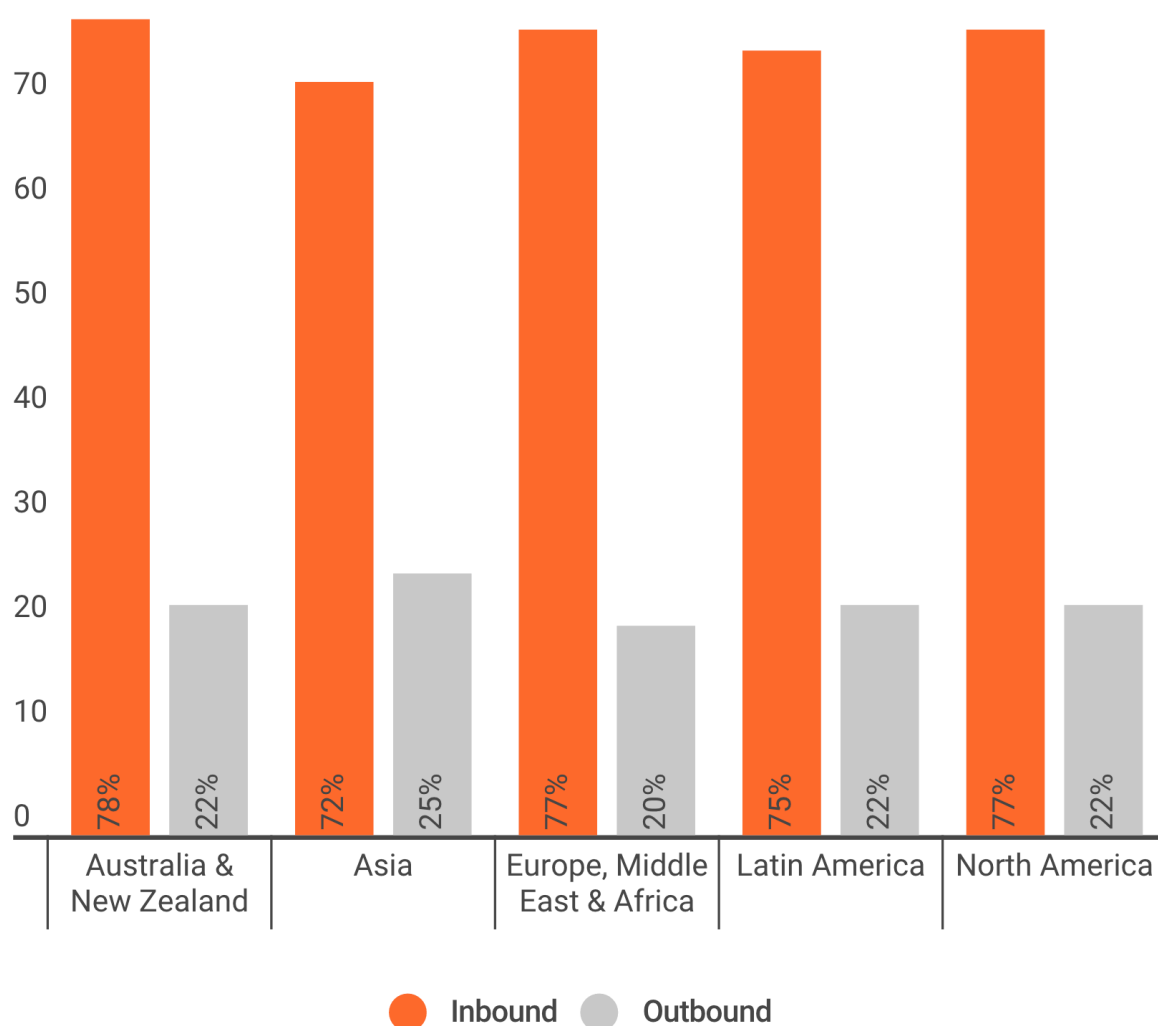
Inbound vs. Outbound by Global vs. Asia

Marketers in Asia are slightly less likely to use inbound and more likely to use outbound



Inbound vs. Outbound by Region

Inbound is 3x as popular as outbound worldwide

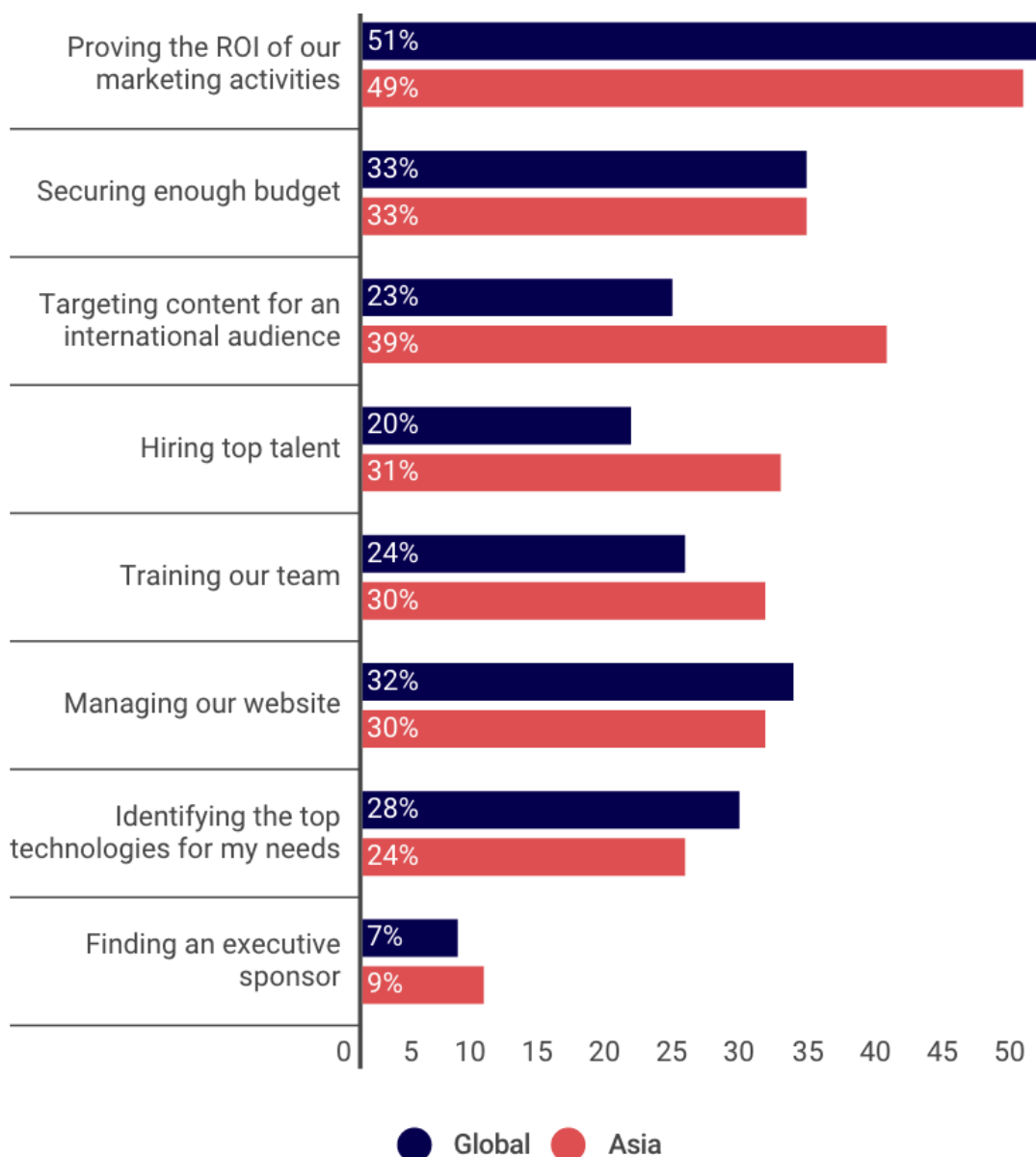


Global versus Asian Marketing Challenges

While proving ROI of marketing activities and securing budget were the top challenges across the globe, including in Asia, there were some differences in top perceived challenges, especially in content creation and hiring talent.

Biggest Marketing Challenge by Global vs. Region

Marketers in Asia face a bigger challenge creating content for an international audience and hiring top talent

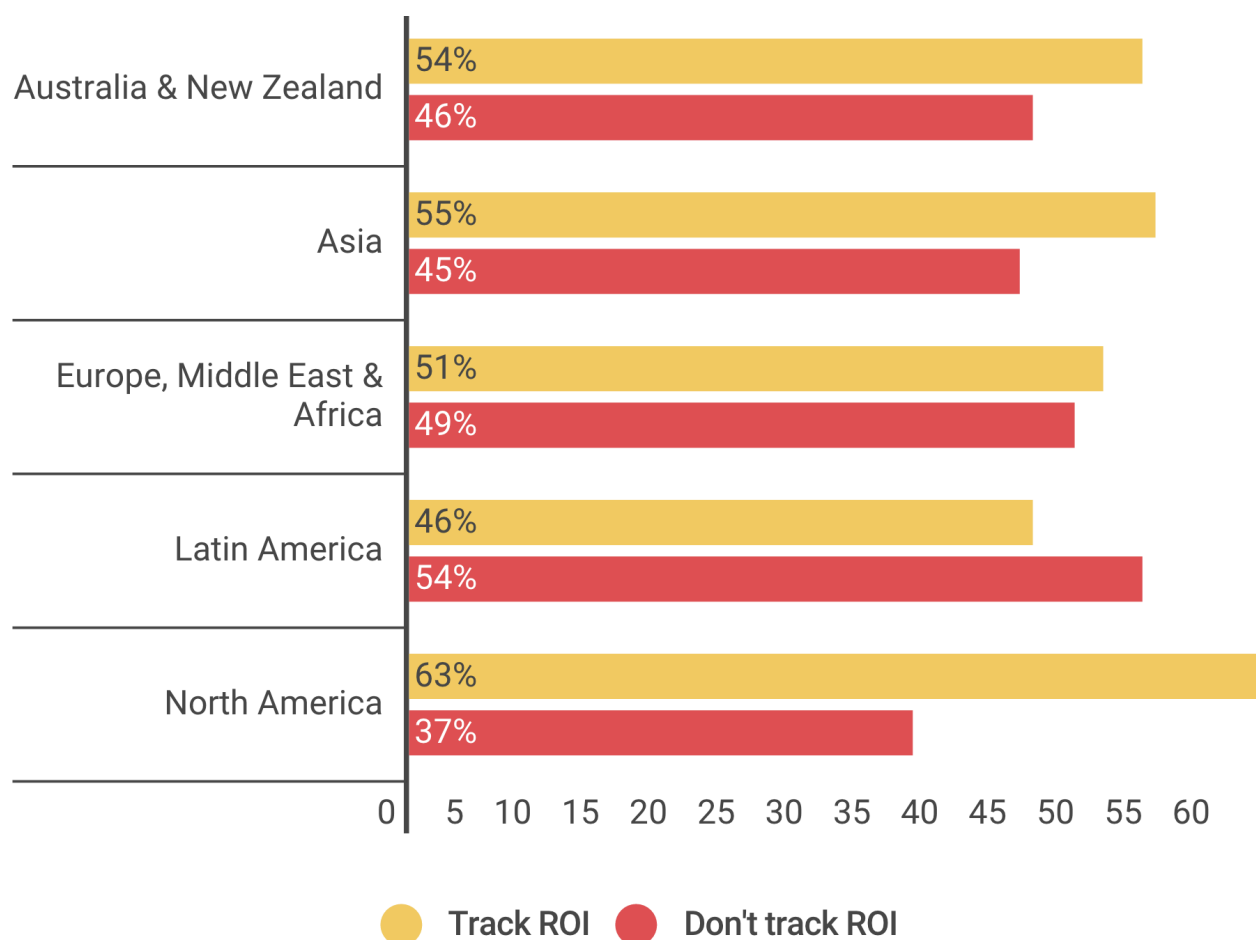


Asia above average for ROI and measurement

Asia was on-par with the global benchmarks for seeing greater ROI with inbound marketing, and by region, Asia has the second-highest percentage of individuals who track ROI, after North America:

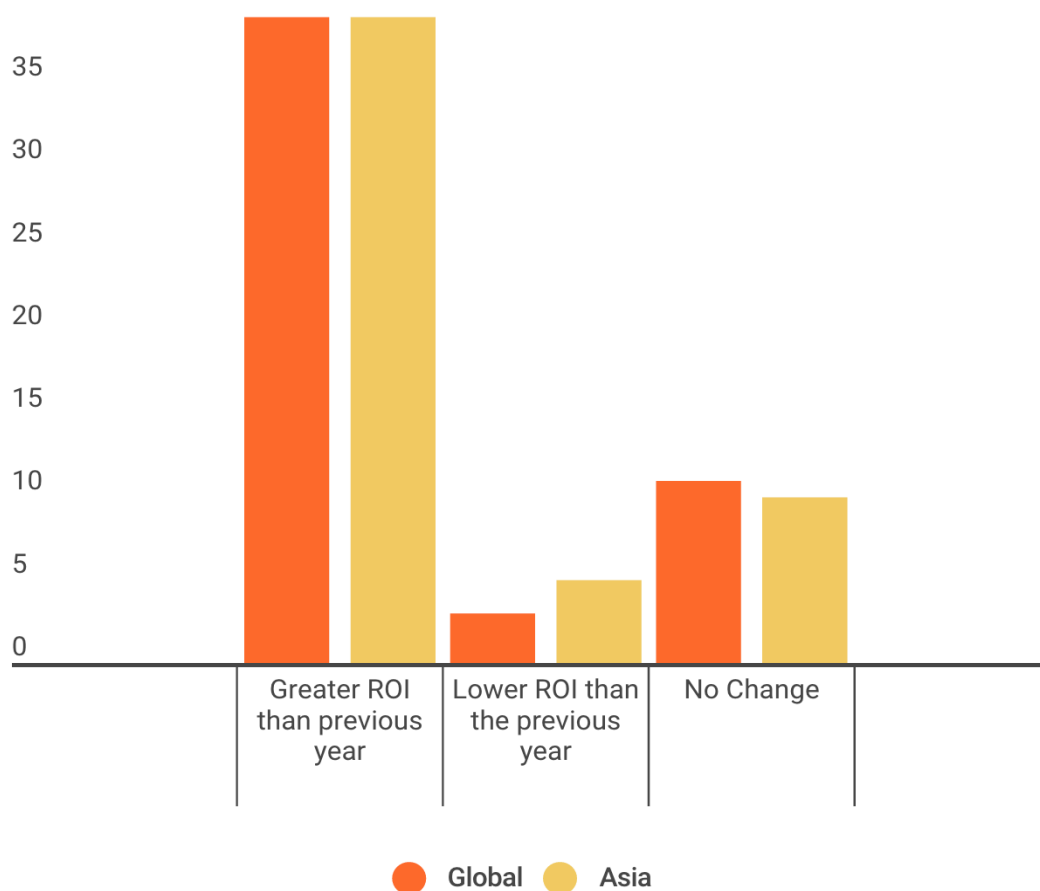
ROI Tracking by Region

Asian marketers are more likely than not to track ROI compared to most peers



ROI by Global vs. Region

Companies in Asia see the same ROI from inbound marketing as the global benchmark



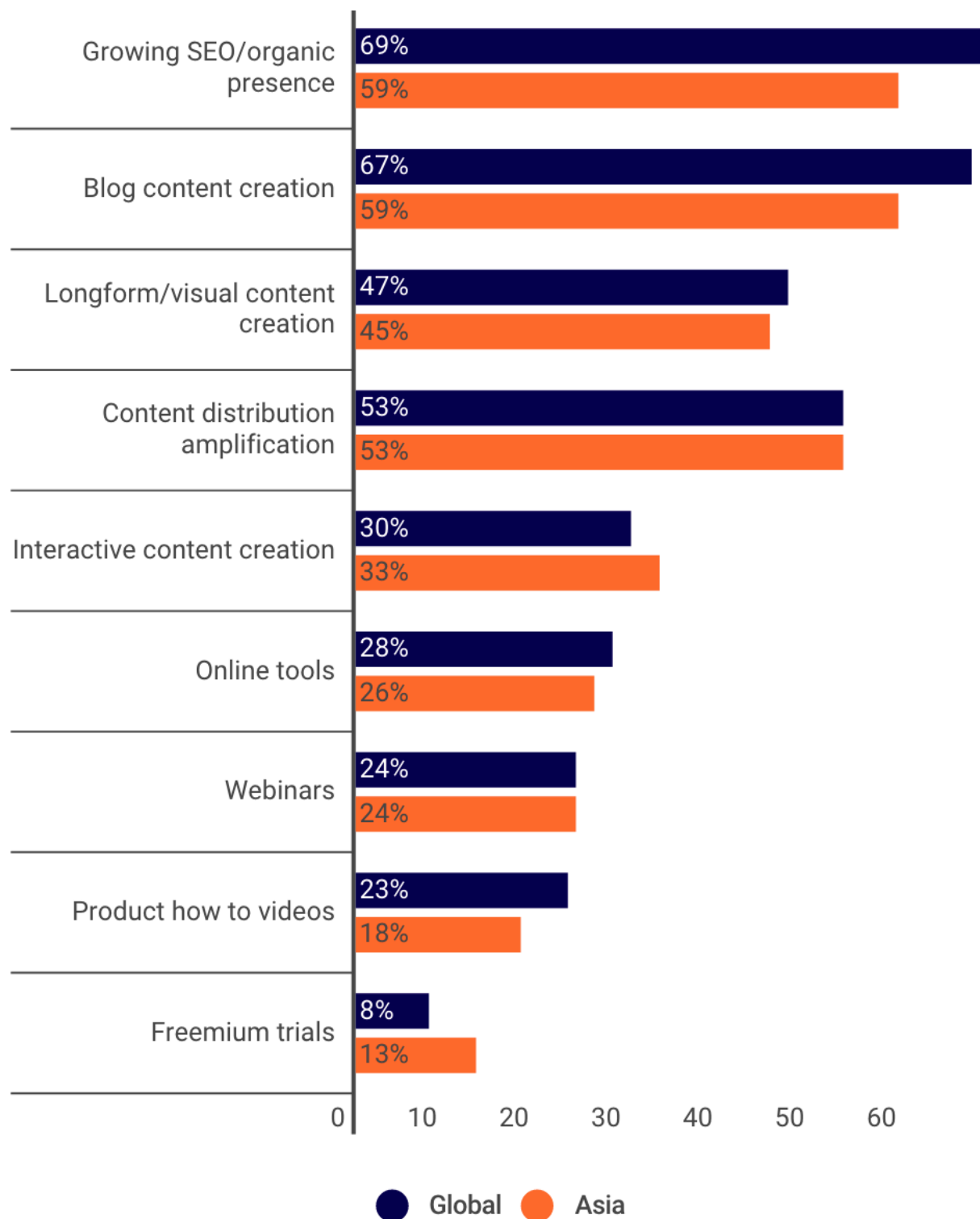
Content is King, Again.

We'll leave you with this one last graph to emphasise the importance of content in Asia as well as globally.

While marketers in Asia had less inbound marketing priorities in comparison to the global average, trends in order of prioritisation follow almost the same pattern. Marketers in Asia are keen on content creation, and slightly more interested in interactive content than the global average. One priority that stood out was freemium trials -- as there was a higher percentage of respondents from the software/IT industry in Asia vs globally, we can infer that an emphasis on product trials is a strategic move for that industry.

Top Inbound Marketing Priorities

Asian marketers prioritise fewer total inbound marketing tactics, with a heavy focus on growing organic presence and blog content creation



Survey Methodology

HubSpot fielded our 2015 State of Inbound survey between June 3, 2015 and July 6, 2015. The survey was administered online, where 3,957 respondents completed it, 362 of which were from Asian countries including but not limited to Singapore, Japan, and India. For the State of Inbound Asia report, we pulled data cuts from only respondents from the region. To see an exact demographic breakdown of respondents from Asia, please reference the “Who we talked to” section of the report. To see the global report, please visit www.stateofinbound.com.

The sampling method was a voluntary sample, with the audience solicited through promotional channels including Facebook, Twitter, LinkedIn, paid, and email campaigns.




Learn more about inbound marketing

HubSpot is a marketing and sales software company dedicated to helping companies improve ROI through inbound tactics. Our all-in-one platform lets you create and execute campaigns in one place, so you can save time and measure results.



Learn about inbound marketing

To learn more about how you can use inbound for your company, enroll in a free inbound marketing certification through HubSpot Academy at hubspot.com/certification

A person is sitting on a couch, holding a tablet. The image is overlaid with a warm orange color. The person is wearing a textured sweater and jeans. The text "This survey was brought to you by" is written in white, sans-serif font, centered horizontally and positioned above the HubSpot logo.

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