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 the 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”

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America (NORTHAM)</td>
<td>79%</td>
</tr>
<tr>
<td>Latin America (LATAM)</td>
<td>75%</td>
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<tr>
<td>Europe, Middle East, and Africa (EMEA)</td>
<td>75%</td>
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<tr>
<td>Australia and New Zealand (ANZ)</td>
<td>76%</td>
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<tr>
<td>Southeast Asia (SEA)</td>
<td>64%</td>
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</tbody>
</table>
71% of marketers believe in their marketing strategy

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

- Yes: 71%
- No: 29%

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

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

- NORTHAM: 71%
- ANZ: 69%
- SEA: 67%
- LATAM: 62%
- EMEA: 77%
While junior marketers have less faith in the strategy set out by managers.

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

- C-level executive (CEO, CMO): 76%
- VP and Directors: 80%
- Manager: 70%
- Individual contributor: 66%

HubSpot Research
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?

- **Inbound Marketing**
  - Yes, our marketing strategy is effective: 75%
  - No, our marketing strategy is not effective: 25%

- **Outbound Marketing**
  - Yes, our marketing strategy is effective: 62%
  - No, our marketing strategy is not effective: 38%
Marketers prioritize converting leads into customers - BOFU content is crucial

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

- Converting contacts/leads to customers: 69%
- Grow traffic to website: 54%
- Increasing revenue derived from existing customers: 44%
- Proving the ROI of our marketing activities: 42%
- Sales enablement: 37%
- Reducing the cost of contacts/leads/customer acquisition: 29%
- Other, please specify: 3%
- Don’t know/not applicable: 3%
## Marketing priorities around the world

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Converting contacts/leads to customers</th>
<th>Grow traffic to website</th>
<th>Proving the ROI of our marketing activities</th>
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<th>Reducing the cost of contacts/leads/customer acquisition</th>
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</thead>
<tbody>
<tr>
<td>NORTHAM</td>
<td>77%</td>
<td></td>
<td>55%</td>
<td>42%</td>
<td>24%</td>
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<td>ANZ</td>
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<td>51%</td>
<td>47%</td>
<td>51%</td>
<td>44%</td>
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<td>LATAM</td>
<td>75%</td>
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<td>47%</td>
<td>45%</td>
<td>31%</td>
<td>25%</td>
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<tr>
<td>EMEA</td>
<td>64%</td>
<td></td>
<td>57%</td>
<td>44%</td>
<td>37%</td>
<td>37%</td>
</tr>
</tbody>
</table>
Inbound marketing goals include SEO, content creation, and automation

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

- Growing SEO/organic presence: 61%
- Blog content creation: 55%
- Marketing automation: 50%
- Content distribution / amplification: 47%
- Interactive content creation: 36%
- Longform (Ebooks, whitepapers) / visual content creation (infographics): 35%
- Visual content creation (infographics): 30%
- Online tools: 28%
- Product how-to videos: 26%
- Webinars: 24%
- Freemium trials: 9%
- Don’t know: 3%
- Other: 2%
Generating traffic is a constant challenge

What are your company's top marketing challenges?

- Generating traffic and leads: 61%
- Proving the ROI of our marketing activities: 39%
- Securing enough budget: 27%
- Managing our website: 25%
- Identifying the right technologies for our needs: 24%
- Training our team: 23%
- Hiring top talent: 22%
- Targeting content for an international audience: 20%
- Finding an executive sponsor: 8%
- Other, please specify: 4%
Top 5 marketing challenges in each region

<table>
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<tr>
<th>Rank</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Generating traffic and leads 62%</td>
<td>Generating traffic and leads 63%</td>
<td>Generating traffic and leads 59%</td>
<td>Generating traffic and leads 66%</td>
<td>Generating traffic and leads 62%</td>
</tr>
<tr>
<td>2</td>
<td>Proving the ROI of our marketing activities 46%</td>
<td>Proving the ROI of our marketing activities 40%</td>
<td>Proving the ROI of our marketing activities 39%</td>
<td>Proving the ROI of our marketing activities 37%</td>
<td>Proving the ROI of our marketing activities 40%</td>
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<tr>
<td>3</td>
<td>Securing enough budget 25%</td>
<td>Securing enough budget 25%</td>
<td>Targeting content for an international audience 37%</td>
<td>Identifying the right technologies for our needs 32%</td>
<td>Managing our website 27%</td>
</tr>
<tr>
<td>4</td>
<td>Managing our website 24%</td>
<td>Managing our website 19%</td>
<td>Securing enough budget 29%</td>
<td>Securing enough budget 29%</td>
<td>Securing enough budget 25%</td>
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<td>5</td>
<td>Identifying the right technologies for our needs 19%</td>
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<td>Targeting content for an international audience 23%</td>
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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: 53%
- Could not or do not calculate ROI: 13%
- Outbound marketing gives us higher ROI: 16%
- Don't know/not applicable: 18%
46% of teams have higher budgets in 2018

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

- 46% Higher
- 32% No Change
- 8% Lower
- 14% Don't know/not applicable
Marketing spend distribution

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

- $25,000 or less: 32%
- $25,001 to $100,000: 21%
- $100,001 to $500,000: 14%
- $500,001 to $1M: 7%
- $1.1M to $5M: 6%
- More than $5M: 3%
Marketing is investing in video channels

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

- YouTube: 45%
- Professional Networks (LinkedIn or Xing): 43%
- Facebook video: 41%
- Instagram: 39%
- Messaging apps (Whatsapp, Facebook Messenger, etc): 24%
- Podcasts: 17%
- None of the above: 13%
- Snapchat: 10%
- Medium: 9%
- Slack: 5%
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)

- YouTube
- Professional Networks (LinkedIn or Xing)
- Facebook video
- Instagram
- Messaging apps
- Podcasts
- Snapchat
- Medium
- Slack

C-level executive (CEO, CMO):
- YouTube: 51%
- Professional Networks: 45%
- Facebook video: 47%
- Instagram: 47%
- Messaging apps: 20%
- Podcasts: 13%
- Snapchat: 11%
- Medium: 8%
- Slack: 4%

VP and Directors:
- YouTube: 54%
- Professional Networks: 47%
- Facebook video: 49%
- Instagram: 47%
- Messaging apps: 34%
- Podcasts: 25%
- Snapchat: 20%
- Medium: 14%
- Slack: 7%

Manager:
- YouTube: 44%
- Professional Networks: 44%
- Facebook video: 40%
- Instagram: 39%
- Messaging apps: 23%
- Podcasts: 15%
- Snapchat: 8%
- Medium: 9%
- Slack: 5%

Individual contributor:
- YouTube: 38%
- Professional Networks: 38%
- Facebook video: 36%
- Instagram: 30%
- Messaging apps: 16%
- Podcasts: 12%
- Snapchat: 5%
- Medium: 7%
- Slack: 3%
Marketers rate paid advertising as overrated

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

- Paid advertising (print, outdoor, broadcast): 30%
- Social media organic: 14%
- Online paid advertising (social media ads, PPC): 11%
- Email marketing: 11%
- Public/analyst relations: 8%
- Marketing automation: 5%
- SEO: 5%
- Collateral development: 5%
- Blogging: 5%
- Sales enablement: 3%
- Other: 2%
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?

- Closing more deals: 75%
- Improving the efficiency of the sales funnel: 48%
- Reducing the length of sales cycle: 32%
- Social Selling: 28%
- Training the sales team: 27%
- Improving existing sales technologies: 23%
- Investing in sales enablement: 16%
- Investing in a CRM: 13%
- Don’t know/not applicable: 3%
- Other: 2%
## Top 5 sales priorities in each region

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<tr>
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<th>EMEA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Closing more deals 85%</td>
<td>Closing more deals 76%</td>
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<td>Closing more deals 70%</td>
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<tr>
<td>2</td>
<td>Improving the efficiency of the sales funnel 56%</td>
<td>Improving the efficiency of the sales funnel 59%</td>
<td>Improving the efficiency of the sales funnel 49%</td>
<td>Social Selling 40%</td>
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<td>3</td>
<td>Reducing the length of sales cycle 37%</td>
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<td>Training the sales team 35%</td>
<td>Improving the efficiency of the sales funnel 39%</td>
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<tr>
<td>4</td>
<td>Training the sales team 22%</td>
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<td>5</td>
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<td>Social Selling 27%</td>
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<td>Training the sales team 27%</td>
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</tbody>
</table>
Prospecting has gotten harder

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

- Getting a response from prospects: 40%
- Engaging multiple decision makers at a company in the buying process: 31%
- Closing deals: 30%
- Connecting via phone: 29%
- Identifying/prospecting good leads: 28%
- Avoiding discounting/negotiation: 24%
- Connecting via email: 20%
- Incorporating social media into the sales process: 16%
- Using sales technologies in my day to day job: 13%
- Sourcing referrals: 13%
- Doing research before making initial call / writing initial email: 10%
- Delivering a presentation: 9%
- Keeping someone on the phone: 9%
- Other: 3%
## Top 5 sales challenges in each region

<table>
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<tr>
<td>1</td>
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<td>Getting a response from prospects 43%</td>
<td>Getting a response from prospects 47%</td>
<td>Closing deals 36%</td>
<td>Getting a response from prospects 34%</td>
</tr>
<tr>
<td>2</td>
<td>Connecting via phone 42%</td>
<td>Connecting via phone 33%</td>
<td>Identifying/prospecting good leads 35%</td>
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<td>Closing deals 31%</td>
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<tr>
<td>3</td>
<td>Engaging multiple decision makers at a company in the buying process 28%</td>
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<td>Identifying/prospecting good leads 25%</td>
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<td>Connecting via email 25%</td>
<td>Avoiding discounting/negotiation 25%</td>
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<td>Avoiding discounting/negotiation 25%</td>
<td>Identifying/prospecting good leads 25%</td>
</tr>
</tbody>
</table>
Presale activities stump 55% of salespeople today

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

- Prospecting: 37%
- Closing: 28%
- Identifying the lead: 18%
- Qualifying: 17%
In your opinion, what part of the sales process do reps struggle with most?
(by Region)

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

- 0 to 30 min: 25%
- 31 to 60 min: 35%
- 61 to 120 min: 19%
- More than 120 min: 8%
Senior leaders underestimate 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?

- **Individual contributor**
  - More than 120 min: 11%
  - 61 to 120 min: 18%
  - 31 to 60 min: 39%
  - 0 to 30 min: 19%

- **Manager**
  - More than 120 min: 10%
  - 61 to 120 min: 28%
  - 31 to 60 min: 26%
  - 0 to 30 min: 23%

- **VP and Directors**
  - More than 120 min: 8%
  - 61 to 120 min: 27%
  - 31 to 60 min: 39%
  - 0 to 30 min: 19%

- **C-level executive (CEO, CMO)**
  - More than 120 min: 5%
  - 61 to 120 min: 10%
  - 31 to 60 min: 38%
  - 0 to 30 min: 36%
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?

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>36%</td>
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<tr>
<td>Email</td>
<td>30%</td>
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<tr>
<td>LinkedIn</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
</tr>
<tr>
<td>Facebook</td>
<td>7%</td>
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<tr>
<td>Other social media network</td>
<td>3%</td>
</tr>
<tr>
<td>Twitter</td>
<td>0%</td>
</tr>
</tbody>
</table>
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)

- **Email**: 32% (C-level), 23% (VP and Directors), 33% (Manager), 30% (Individual contributor)
- **Telephone**: 14% (C-level), 18% (VP and Directors), 35% (Manager), 9% (Individual contributor)
- **LinkedIn**: 7% (C-level), 7% (VP and Directors), 9% (Manager), 9% (Individual contributor)
- **Facebook**: 12% (C-level), 3% (VP and Directors), 4% (Manager), 8% (Individual contributor)
- **Other social media network**: 1% (C-level), 0% (VP and Directors), 0% (Manager), 2% (Individual contributor)
- **Twitter**: 1% (C-level), 0% (VP and Directors), 0% (Manager), 0% (Individual contributor)
- **Other**: 1% (C-level), 8% (VP and Directors), 10% (Manager), 11% (Individual contributor)
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?

- No change: 31%
- Increase 11 to 25%: 17%
- Increase by more than 50%: 17%
- Increase up to 10%: 14%
- Increase 26 to 50%: 11%
- Don't know/not applicable: 9%
- Decreasing team size: 2%
Which is the top source of leads for your sales organization?

- Referrals: 32%
- Leads from marketing: 28%
- Other please specify: 3%
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)

- Referrals
- Leads directly sourced by sales
- Leads from marketing

C-level executive (CEO, CMO):
- Referrals: 42%
- Leads directly sourced by sales: 24%
- Leads from marketing: 30%

VP and Directors:
- Referrals: 39%
- Leads directly sourced by sales: 33%
- Leads from marketing: 26%

Manager:
- Referrals: 22%
- Leads directly sourced by sales: 49%
- Leads from marketing: 27%

Individual contributor:
- Referrals: 23%
- Leads directly sourced by sales: 44%
- Leads from marketing: 31%
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)

- **Referrals**: 5% 10% 21% 26% 33%
- **Leads directly sourced by sales**: 8% 11% 30% 33% 16%
- **Leads from marketing**: 8% 19% 38% 21% 7%

1 - Very poor quality  2  3  4  5 - Very high quality
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?

- Generally aligned: 47%
- Tightly aligned/There is a SLA: 26%
- Rarely aligned: 11%
- Don't know: 9%
- Misaligned: 7%
Teams in EMEA and ANZ have the most alignment

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

- **EMEA**
  - Tightly aligned/There is a SLA: 30%
  - Generally aligned: 47%
  - Rarely aligned: 11%
  - Misaligned: 5%

- **ANZ**
  - Tightly aligned/There is a SLA: 29%
  - Generally aligned: 48%
  - Rarely aligned: 6%
  - Misaligned: 6%

- **NORTHAM**
  - Tightly aligned/There is a SLA: 26%
  - Generally aligned: 52%
  - Rarely aligned: 9%
  - Misaligned: 5%

- **SEA**
  - Tightly aligned/There is a SLA: 23%
  - Generally aligned: 49%
  - Rarely aligned: 9%
  - Misaligned: 5%

- **LATAM**
  - Tightly aligned/There is a SLA: 19%
  - Generally aligned: 40%
  - Rarely aligned: 17%
  - Misaligned: 15%
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)

- Tightly aligned/There is a SLA: Yes, our strategy is effective - 85%, No, our strategy is not effective - 15%
- Generally aligned: Yes, our strategy is effective - 76%, No, our strategy is not effective - 24%
- Rarely aligned: Yes, our strategy is effective - 46%, No, our strategy is not effective - 54%
- Misaligned: Yes, our strategy is effective - 76%, No, our strategy is not effective - 24%
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)

- Tightly aligned / There is a SLA: 29% Referrals, 30% Leads from marketing, 39% Leads directly sourced by sales
- Generally aligned: 32% Referrals, 26% Leads from marketing, 39% Leads directly sourced by sales
- Rarely aligned: 39% Referrals, 16% Leads from marketing, 44% Leads directly sourced by sales
- Misaligned: 32% Referrals, 27% Leads from marketing, 38% Leads directly sourced by sales
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)

- Tightly aligned/There is a SLA: 65% (Inbound marketing gives us higher ROI), 10% (Outbound marketing gives us higher ROI), 15% (Could not or do not calculate ROI)
- Generally aligned: 53% (Inbound marketing gives us higher ROI), 17% (Outbound marketing gives us higher ROI), 18% (Could not or do not calculate ROI)
- Rarely aligned: 39% (Inbound marketing gives us higher ROI), 21% (Outbound marketing gives us higher ROI), 27% (Could not or do not calculate ROI)
- Misaligned: 35% (Inbound marketing gives us higher ROI), 16% (Outbound marketing gives us higher ROI), 36% (Could not or do not calculate ROI)
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)

- Tightly aligned/There is a SLA: 70% increasing, 27% no change, 3% decreasing
- Generally aligned: 65% increasing, 33% no change, 2% decreasing
- Rarely aligned: 57% increasing, 41% no change, 1% decreasing
- Misaligned: 56% increasing, 42% no change, 2% decreasing
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)

- Tightly aligned/There is a SLA: 52% Higher, 31% No Change, 7% Lower
- Generally aligned: 48% Higher, 33% No Change, 6% Lower
- Rarely aligned: 38% Higher, 34% No Change, 14% Lower
- Misaligned: 32% Higher, 30% No Change, 20% Lower
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?

- Word of mouth (friends, social media) referrals: 55%
- Customer references: 46%
- Media articles: 38%
- Vendor-authored materials (eBooks, blog posts, whitepapers, case studies): 38%
- Analyst reports / recommendations (Gartner, Forrester): 34%
- Crowdsourced review sites (Quora, G2 Crowd, TrustRadius): 27%
- Salesperson: 22%
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?

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Preferences are consistent globally

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

- Word of mouth (friends, social media) referrals
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- Crowdsourced review sites (Quora, G2 Crowd, TrustRadius)
- Salesperson

Preferences are consistent globally
How do you prefer to communicate for business purposes?

- Email: 83%
- Face-to-Face: 59%
- Phone: 55%
- Video conferencing (Skype, Google Hangout): 41%
- Social Media (LinkedIn, Facebook, Twitter): 35%
- Messenger Apps (Whatsapp, WeChat, Facebook Messenger): 32%
Senior staff are more interested in using messaging for communications

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

C-level executive (CEO, CMO)  
- Email: 82%  
- Phone: 64%  
- Face-to-Face: 59%  
- Video conferencing (Skype, Google Hangout): 46%  
- Social Media (LinkedIn, Facebook, Twitter): 39%  
- Messenger Apps (Whatsapp, WeChat, Facebook Messenger): 35%

VP and Directors  
- Email: 78%  
- Phone: 58%  
- Face-to-Face: 56%  
- Video conferencing (Skype, Google Hangout): 46%  
- Social Media (LinkedIn, Facebook, Twitter): 34%  
- Messenger Apps (Whatsapp, WeChat, Facebook Messenger): 34%

Manager  
- Email: 83%  
- Phone: 58%  
- Face-to-Face: 56%  
- Video conferencing (Skype, Google Hangout): 38%  
- Social Media (LinkedIn, Facebook, Twitter): 34%  
- Messenger Apps (Whatsapp, WeChat, Facebook Messenger): 30%

Individual contributor  
- Email: 85%  
- Phone: 56%  
- Face-to-Face: 50%  
- Video conferencing (Skype, Google Hangout): 35%  
- Social Media (LinkedIn, Facebook, Twitter): 33%  
- Messenger Apps (Whatsapp, WeChat, Facebook Messenger): 28%
How do you prefer to communicate for business purposes? (by Region)

- **Email**
  - NORTHAM: 89%
  - ANZ: 92%
  - SEA: 84%
  - LATAM: 82%
  - EMEA: 74%

- **Face-to-Face**
  - NORTHAM: 41%
  - ANZ: 41%
  - SEA: 36%
  - LATAM: 42%
  - EMEA: 36%

- **Phone**
  - NORTHAM: 18%
  - ANZ: 18%
  - SEA: 22%
  - LATAM: 39%
  - EMEA: 26%

- **Video conferencing (Skype, Google Hangout)**
  - NORTHAM: 26%
  - ANZ: 35%
  - SEA: 42%
  - LATAM: 42%
  - EMEA: 39%

- **Social Media (LinkedIn, Facebook, Twitter)**
  - NORTHAM: 18%
  - ANZ: 22%
  - SEA: 39%
  - LATAM: 26%
  - EMEA: 26%

- **Messenger Apps (Whatsapp, WeChat, Facebook Messenger)**
  - NORTHAM: 18%
  - ANZ: 22%
  - SEA: 42%
  - LATAM: 39%
  - EMEA: 26%
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?

- Word of mouth (friends, social media) referrals
- Customer references
- Vendor-authored materials (eBooks, blog posts, whitepapers, case studies)
- Media articles
- Analyst reports / recommendations (Gartner, Forrester)
- Crowdsourced review sites (Quora, G2 Crowd, TrustRadius)
- Salesperson

2018 2017 2016 2015
Sales says they source the most leads themselves

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

- Leads directly sourced by sales: 37%, 38%, 38%, 23%
- Referrals: 32%, 33%, 36%, 44%
- Leads from marketing: 28%, 25%, 22%, 33%

2018 | 2017 | 2016 | 2015
---|---|---|---
Leads directly sourced by sales | | | |
Referrals | | | |
Leads from marketing | | | |
Marketing priorities have been consistent through the years

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

- Converting contacts/leads to customers
- Grow traffic to website
- Increasing revenue derived from existing customers
- Proving the ROI of our marketing activities
- Sales enablement
- Reducing the cost of contacts / leads / customer acquisition

2018: 69% Converting contacts/leads to customers, 54% Grow traffic to website, 44% Increasing revenue derived from existing customers, 42% Proving the ROI of our marketing activities, 29% Sales enablement, 24% Reducing the cost of contacts / leads / customer acquisition
2017: 70% Converting contacts/leads to customers, 55% Grow traffic to website, 45% Increasing revenue derived from existing customers, 42% Proving the ROI of our marketing activities, 32% Sales enablement, 27% Reducing the cost of contacts / leads / customer acquisition
2016: 70% Converting contacts/leads to customers, 57% Grow traffic to website, 46% Increasing revenue derived from existing customers, 41% Proving the ROI of our marketing activities, 32% Sales enablement, 27% Reducing the cost of contacts / leads / customer acquisition
2015: 70% Converting contacts/leads to customers, 57% Grow traffic to website, 44% Increasing revenue derived from existing customers, 41% Proving the ROI of our marketing activities, 37% Sales enablement, 29% Reducing the cost of contacts / leads / customer acquisition
As have sales priorities

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

- Closing more deals
- Improving the efficiency of the sales funnel
- Social Selling
- Training the sales team
- Reducing the length of sales cycle
- Improving existing sales technologies
- Investing in sales enablement
- Investing in a CRM

[Bar chart showing percentage changes from 2015 to 2018 for each priority]
Marketers have increased the quality of their leads

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

- Inbound practices (e.g. SEO, referrals, social media, content/blog, hyper-targeted display/social ads)
  - 2018: 60%
  - 2017: 59%
  - 2016: 52%

- Self-sourced leads from sales team
  - 2018: 21%
  - 2017: 26%
  - 2016: 31%

- Outbound practices (e.g. Cold Calling, TV/Outdoor Ads, Trade Shows, Purchased lists)
  - 2018: 18%
  - 2017: 16%
  - 2016: 16%
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?

- Identifying the lead: 18%, 21%, 20%
- Prospecting: 37%, 38%, 33%, 43%
- Qualifying: 17%, 13%, 17%, 21%
- Closing: 28%, 28%, 30%, 36%

2018 2017 2016 2015
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?

<table>
<thead>
<tr>
<th>Time Range</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 30 minutes</td>
<td>25%</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>31 - 60 minutes</td>
<td>35%</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>61 - 120 minutes</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>More than 120 minutes</td>
<td>8%</td>
<td>13%</td>
<td>10%</td>
</tr>
</tbody>
</table>
LinkedIn has become a sales channel
## Marketing teams have invested in video, Instagram, and messaging

<table>
<thead>
<tr>
<th>Channel</th>
<th>2018</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>48%</td>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>Professional networks (LinkedIn or Xing)*</td>
<td>48%</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>Facebook video</td>
<td>46%</td>
<td>39%</td>
<td>33%</td>
</tr>
<tr>
<td>Instagram</td>
<td>39%</td>
<td>37%</td>
<td>24%</td>
</tr>
<tr>
<td>Messaging apps (Whatsapp, Facebook Messenger, etc)</td>
<td>41%</td>
<td>39%</td>
<td>20%</td>
</tr>
<tr>
<td>Podcasts</td>
<td>24%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>None of the above</td>
<td>20%</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>19%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Medium</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Slack</td>
<td>13%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

*New option in 2018

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

- YouTube
- Professional networks (LinkedIn or Xing)*
- Facebook video
- Instagram
- Messaging apps (Whatsapp, Facebook Messenger, etc)
- Podcasts
- None of the above
- Snapchat
- Medium
- Slack

*New option in 2018
How do you prefer to communicate for business purposes?

<table>
<thead>
<tr>
<th>Communication Method</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>83%</td>
<td>86%</td>
<td>88%</td>
</tr>
<tr>
<td>Face-to-Face</td>
<td>59%</td>
<td>60%</td>
<td>61%</td>
</tr>
<tr>
<td>Phone</td>
<td>55%</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>Social Media (LinkedIn, Facebook, Twitter)</td>
<td>35%</td>
<td>39%</td>
<td>42%</td>
</tr>
<tr>
<td>Video conferencing (Skype, Google Hangout)</td>
<td>41%</td>
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<td>32%</td>
<td>31%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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 Luc.id, a survey panel provider.
Location

Where are you based?

- **NORTHAM**: 36%
- **ANZ**: 28%
- **SEA**: 16%
- **LATAM**: 14%
- **EMEA**: 6%
Company type

Is your company any of the following?

- 57% Not HubSpot customer or partner
- 43% HubSpot customer or partner agency
- 0% Not HubSpot customer or partner

HubSpot Research
To whom does your company primarily sell?

- Other businesses: 55%
- Consumers: 35%
- Nonprofit/government: 5%
- Don't know/not applicable: 5%
Company size and revenue

How many full-time employees does your company have?

- More than 1000: 10%
- 201 to 1000: 10%
- 26 to 200: 23%
- 11 to 25: 16%
- Fewer than 10: 42%
What best describes your company’s average annual revenue?  (Please estimate in USD)

- Less than 250,000: 32%
- 250,000 to 999,999: 14%
- 1M to 9.9M: 16%
- 10M to 499M: 10%
- 500M to 999M: 2%
- 1B or more: 3%
Level of seniority

What best describes your level in your company?

- C-level executive (CEO, CMO): 23%
- Vice president: 3%
- Director: 11%
- Manager: 27%
- Individual contributor: 28%
Industries represented

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

- Marketing Agencies: 18%
- Other: 15%
- Information Technology and Services: 10%
- Education: 8%
- Consumer Products: 7%
- Industrial and Manufacturing: 6%
- Software: 5%
- Media and Publishing: 5%
- Nonprofit/Government: 4%
- Ecommerce: 4%
- Financial Services: 4%
- Healthcare and Medical: 4%
- Travel and Tourism: 4%
- Telecommunications: 2%
- Sports and Recreation: 1%
- Research: 1%
- Staffing and Recruiting: 1%
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.