

STATE *of* INBOUND ²⁰/₁₅

EYEMAGINE®

Marketing

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Welcome

Introduction

Welcome to the seventh annual *State of Inbound* report. We're glad you're here. Whether this is your first time reading this report, your seventh time, or you just downloaded it on a whim, you're bound to have some questions.

“What is *State of Inbound*?”

Every year, HubSpot surveys thousands of the world’s foremost marketers and salespeople -- 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, collate and consolidate their anecdotal answers, and put the polished result into a master report: *State of Inbound*.

For the last seven years, the report has tracked the practice and adoption of “inbound marketing.” Instead of blasting out interruptive ads and trying to pull people to your company, inbound marketing uses helpful content to attract visitors and get them to engage of their own volition.

Last year, we added sales to the mix to provide a more complete view into the entire lead-to-customer lifecycle. Our research found that salespeople struggle with a lack of information about their leads and manual data entry -- two challenges that necessarily reduce their effectiveness at converting leads to customers. Just like Marketing’s lead generation is of prime interest to salespeople, marketers would be wise to take the problems sapping Sales’ efficacy to heart.

Considering that aligning marketing and sales practices is critically important to a company’s success, this report contains both marketing- and sales-specific results -- as well as areas where the two intersect.

“Is anything different from last year’s report?”

Yes, a lot is different in this year’s report. We asked some of the same questions (for trending data) and several new ones (to keep pace with emerging marketing trends).

The biggest change is that 2015’s report doesn’t cover the emergence of inbound marketing as it has in past years -- the principles are now well-entrenched. Rather, this year’s data begins to reveal why leaders lead and laggards lag. You’ll also find trending sales data that reveals how salespeople’s pressing challenges and priorities have shifted since last year, in addition to attitudes toward buzzworthy sales practices such as social selling.

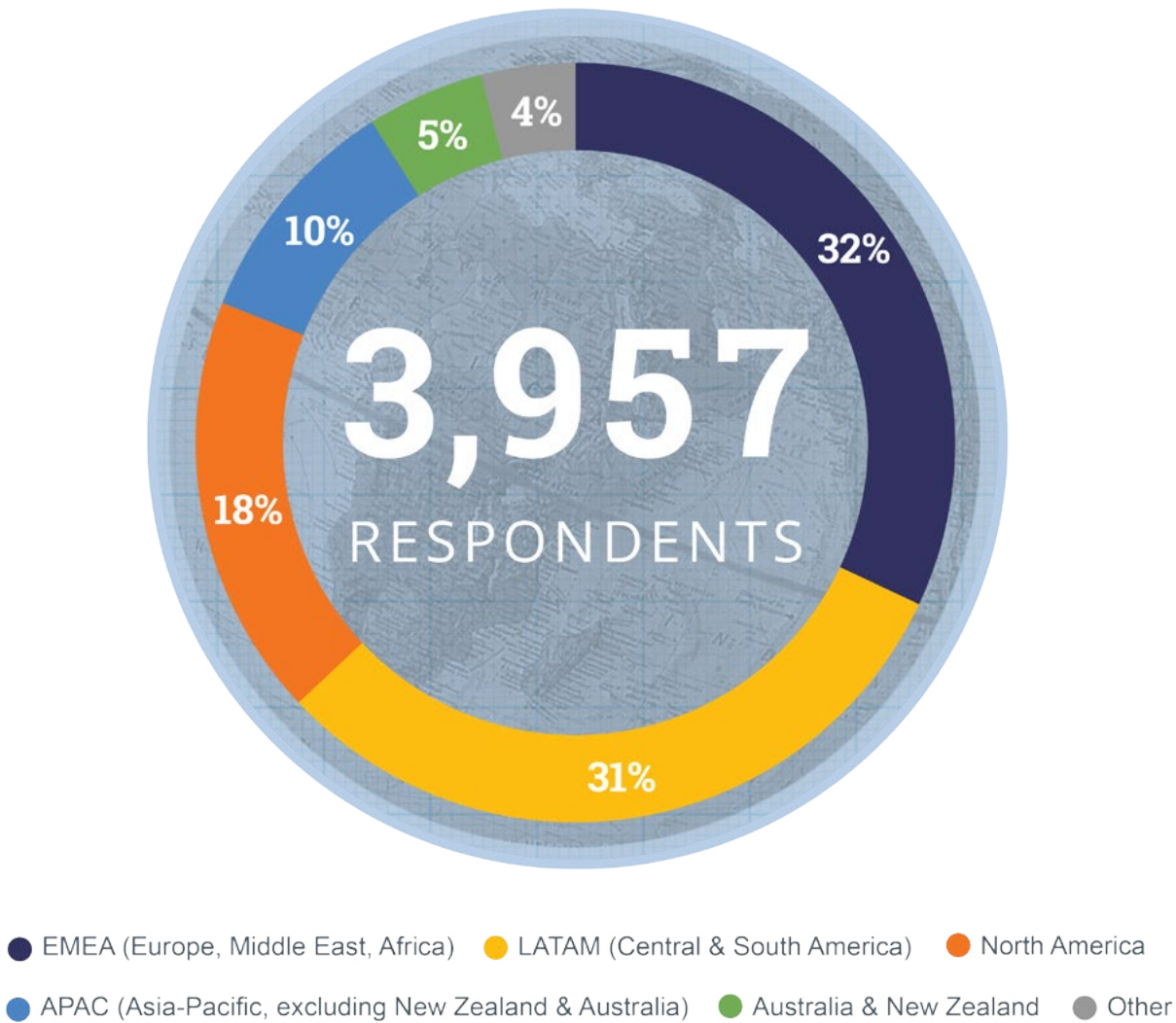
We’ve also improved our entire process since 2014. Thanks to rigorous QA, we’ve ensured that this year’s data is more representative of the marketing and sales

industries as a whole. First, we dug deeper into segmenting different marketing and sales tactics on a more granular level. Additionally, we expanded our reach globally, engaging audiences in 150 countries across six international regions.

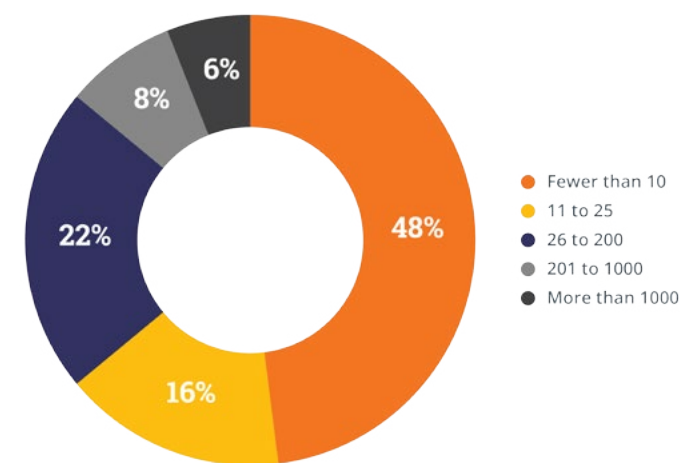
Who We Talked To

The State of Inbound survey has always been comprehensive, but this year’s report is truly a global document, with more than 150 countries represented. The majority of our nearly 4,000 respondents are marketers who work for B2B SMBs, and only one-third have an affiliation with HubSpot. Half of the companies represented generate under \$1M a year in revenue, and the other half generate over \$1M.

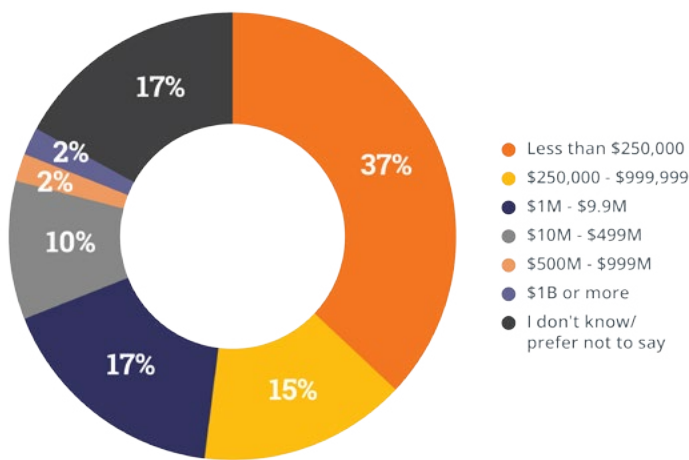
We hope this document can serve as a roadmap for your organization’s entire approach to inbound marketing and sales in 2016. All data was gathered on the back half of 2015 to give as accurate a representation of the current industry landscape as possible.



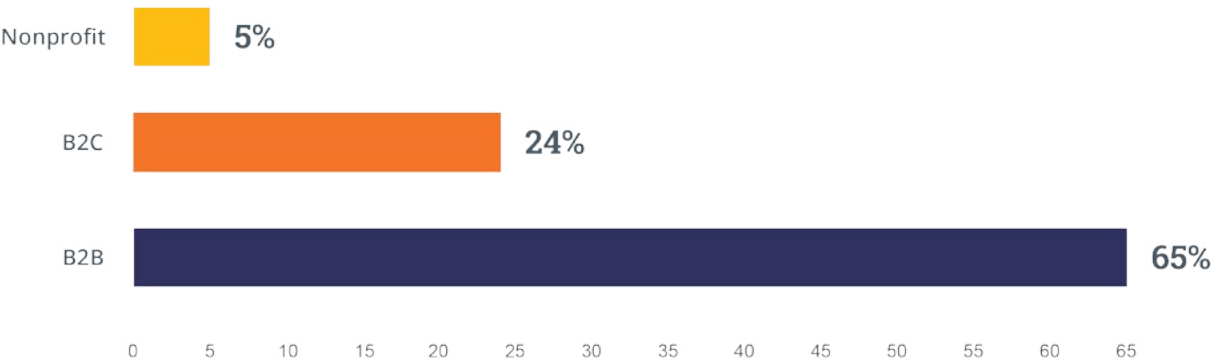
How many full time employees does your company have?



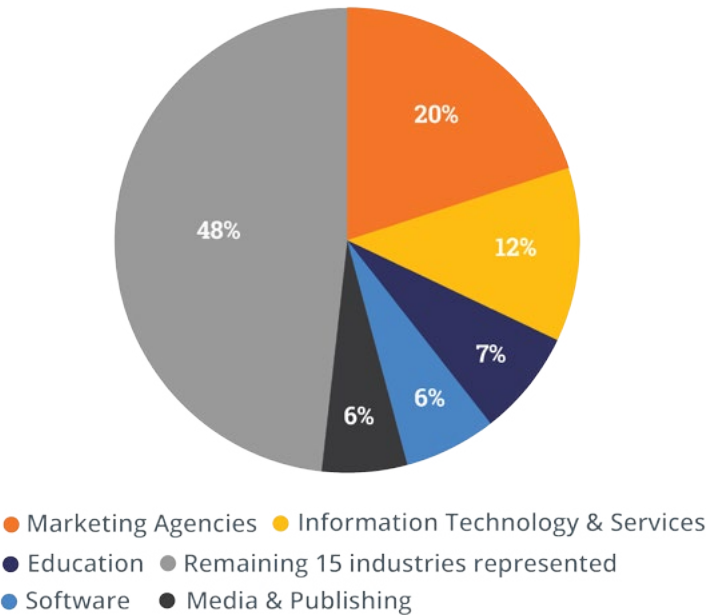
What best describes your company's average annual revenue?



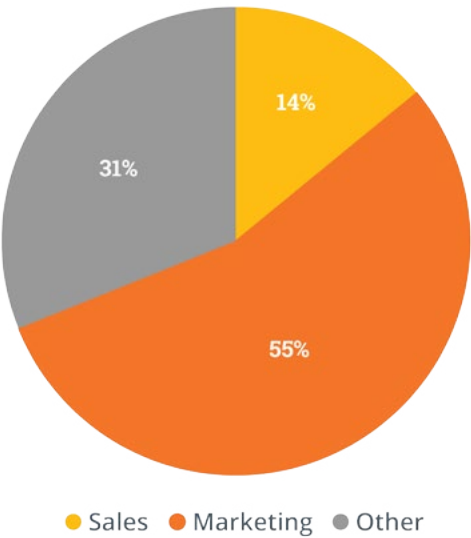
Who does your company primarily sell to?



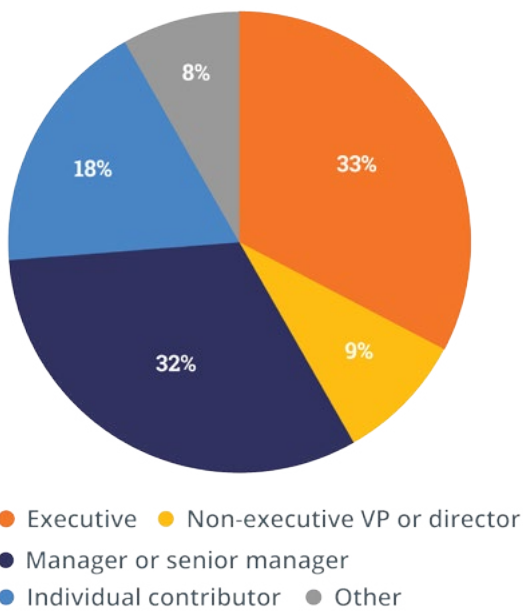
Which of the following best describes the principal industry of your organization?



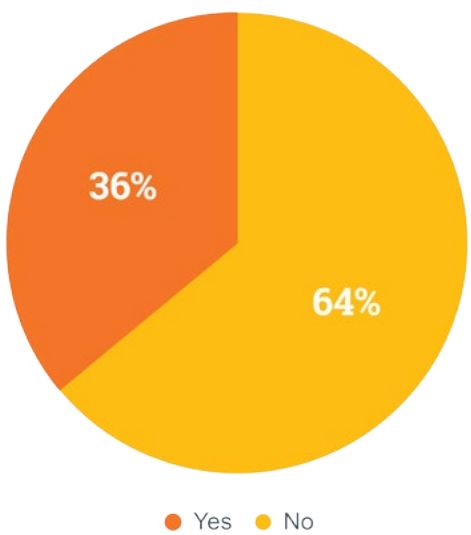
What best describes your function in your company?



What best describes your level in your company?



Are you or your company a HubSpot partner or agency?



State of Inbound Marketing

State of Inbound Marketing

Inbound marketing is no longer a totally new concept. Marketers and other business leaders who are not currently practicing inbound marketing tend to be at least somewhat familiar with the methodology. At the other end of the adoption spectrum, a healthy number of marketers have gone all in on inbound marketing, and learned valuable lessons along the way. They've used these lessons to iterate and refine their marketing strategies, and their results bear testament to this hard work.

This year, drawing on both of these populations from a variety of industries, companies, and countries, our data reveals what separates the most successful inbound marketers from the rest. Whether you're a seasoned marketer or you just started your first marketing job yesterday, this report contains valuable nuggets of wisdom that can help you do your job better -- starting today.

We've organized the data into five self-contained chapters:

Growth of Inbound

Emerging Trends

Best-in-Class Marketing Practices

Setting Up for Inbound Success

International Inbound

There's no need to read the report in order. Start with the section that corresponds to your needs, and jump around as you see fit. Alternately, you can simply read the summary of the most important points at the beginning of each section.

The 7 Most Important Takeaways

1. Three out of 4 marketers across the globe prioritize an inbound approach to marketing.
2. Both inbound and outbound marketers rank paid advertising as the #1 most overrated marketing tactic.
3. Proven marketing ROI unlocks budget. But you have to be tracking ROI in the first place, which not everyone is doing.
4. Leading marketers recognize that inbound is a long game. Both past success and past failure with inbound correlates with an inbound marketing budget increase.
5. Inbound is the preferred marketing strategy regardless of company type. B2B, B2C, nonprofit -- everyone's implementing inbound tactics.
6. Inbound campaigns achieve higher ROI than outbound. This holds true across different company sizes and budgets.
7. Establishing a Marketing-Sales service level agreement (SLA) leads to higher ROI. The presence of an SLA also correlates with budget and staff increases.

Chapter 1

Growth of Inbound

Inbound marketing has traditionally been touted as small companies' answer to big marketing budgets. While large companies command sizable budgets to spend on flashy advertising, smaller organizations have struggled to get the word out on a relative shoestring. But that changed with inbound marketing, which prioritizes compelling content over ads, and pulling customers to you rather than pushing your message onto them. Suddenly the little guy possessed just as much marketing power (and sometimes more) than their peers with deeper pockets.

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

- 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

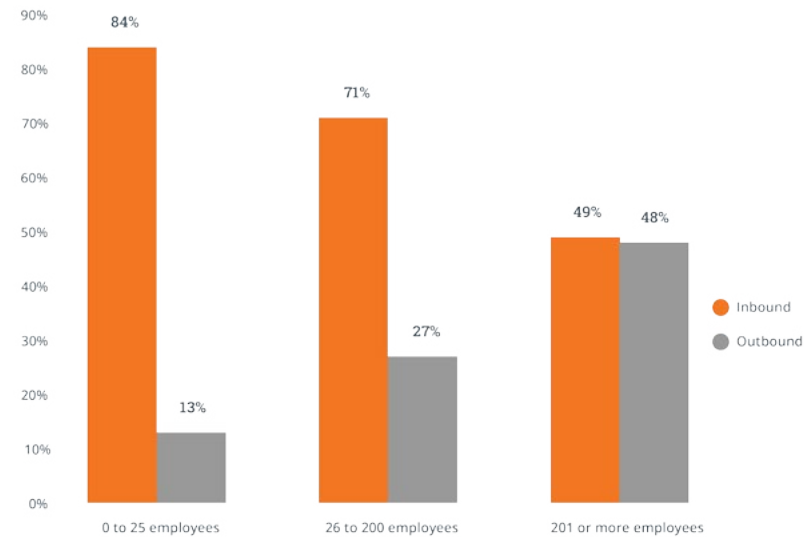
Inbound continues to be the core marketing strategy of the "lean 'n' mean" shop -- those 25-200 employee operations either fighting for growth, or just beginning to enter the growth phase. Over six times as many respondents from companies with fewer than 25 employees cited inbound as their primary marketing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

At companies with over 200 employees, inbound and outbound marketing strategies are deployed equally. 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 companies with fewer than 200 people



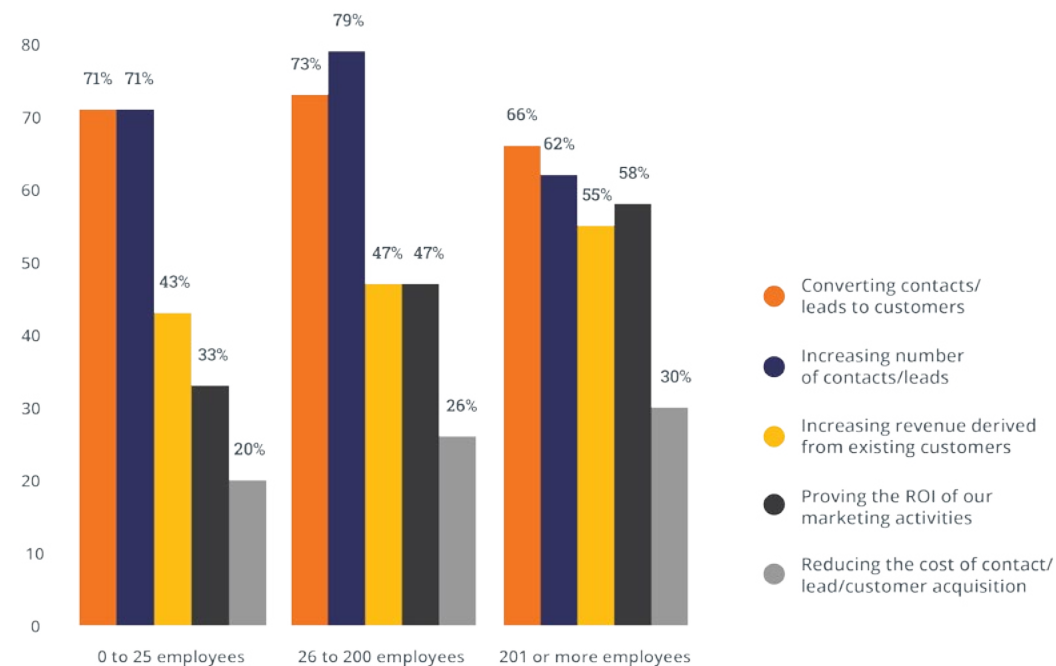
Leads (and converting them) remain top priority

Increasing volume at the top of the funnel while increasing conversion percentage at the bottom remain top priorities for respondents. This was true across company size, as well as organization type (B2B, B2C, nonprofit).

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 over 30% more likely to be cited as a priority than the next-closest item.

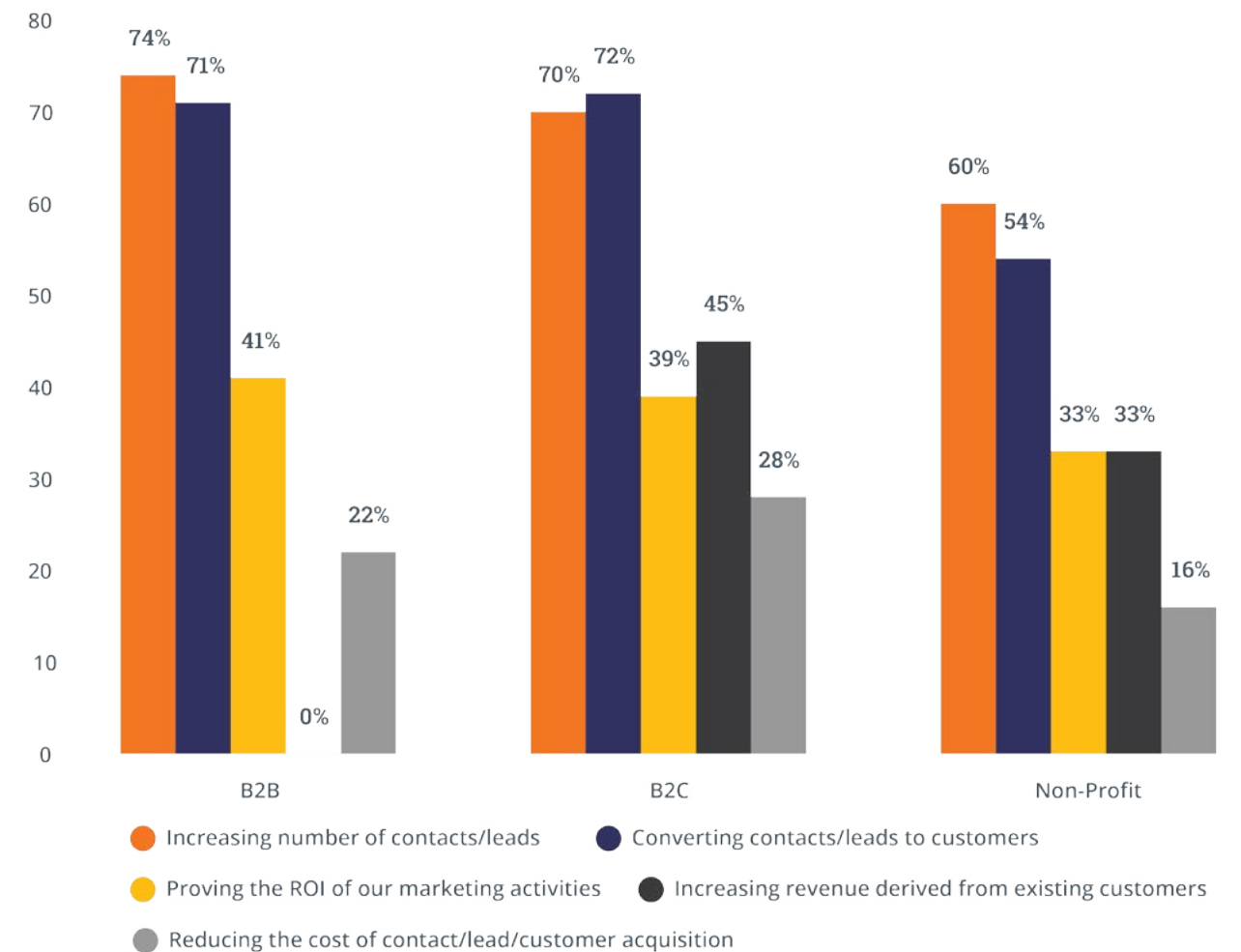
Top Priorities by Company Size

Increasing leads and converting them are top priorities, especially for SMBs



Top Priorities by Company Type

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



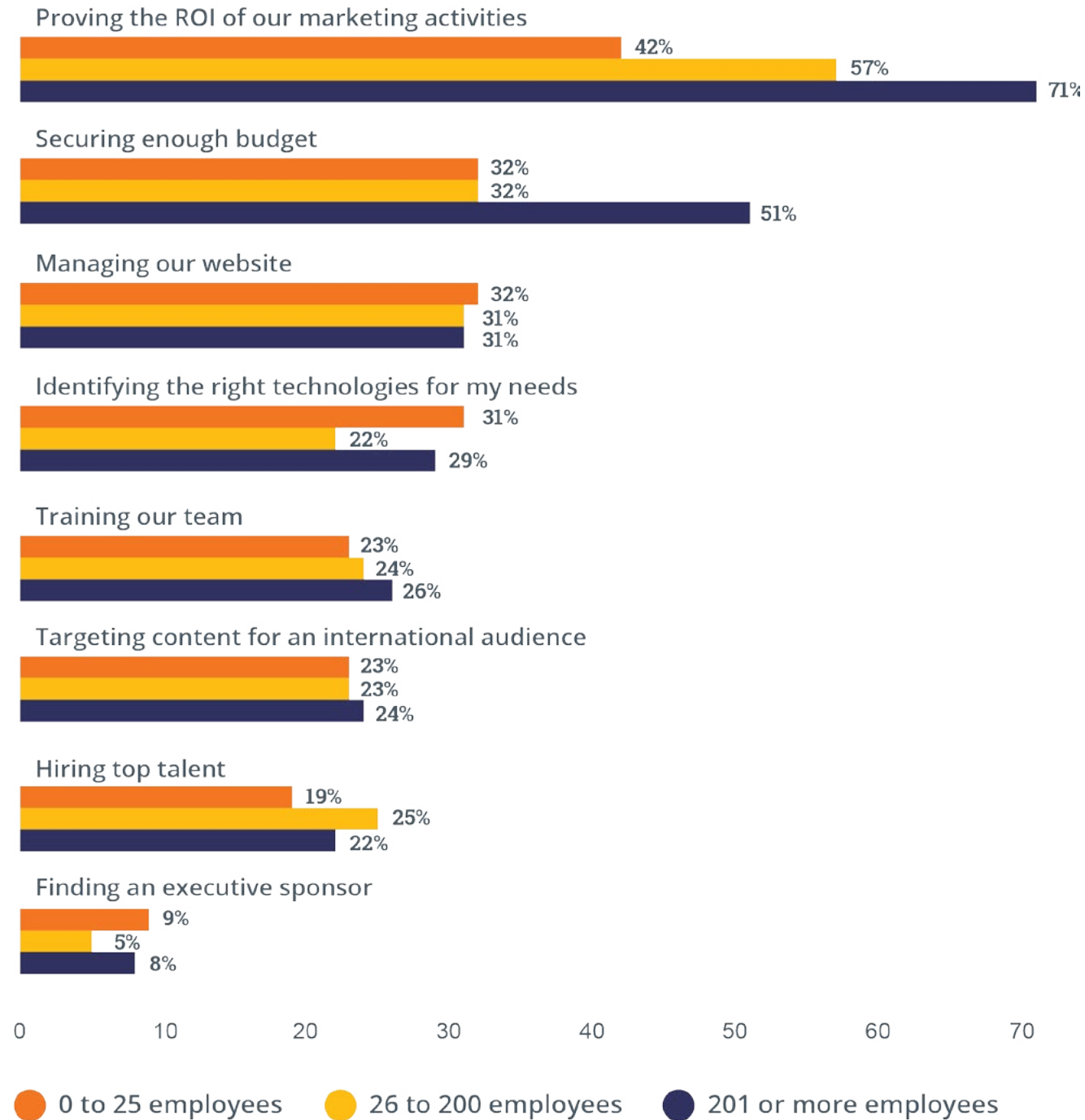
Demonstrating ROI is the #1 challenge marketers face

Proving a demonstrable return on marketing dollars was the most oft-cited challenge across companies of different size and focus, and securing more budget to allocate toward ROI-generating activities was next in line.

Finding the right technologies and managing a website were understandably a larger concern for small companies fighting to reach the growth phase. For companies under 25 people, these two concerns were 10% less likely to be cited as the top-ranked “proving ROI”; among established companies, they were 40% less likely to be mentioned.

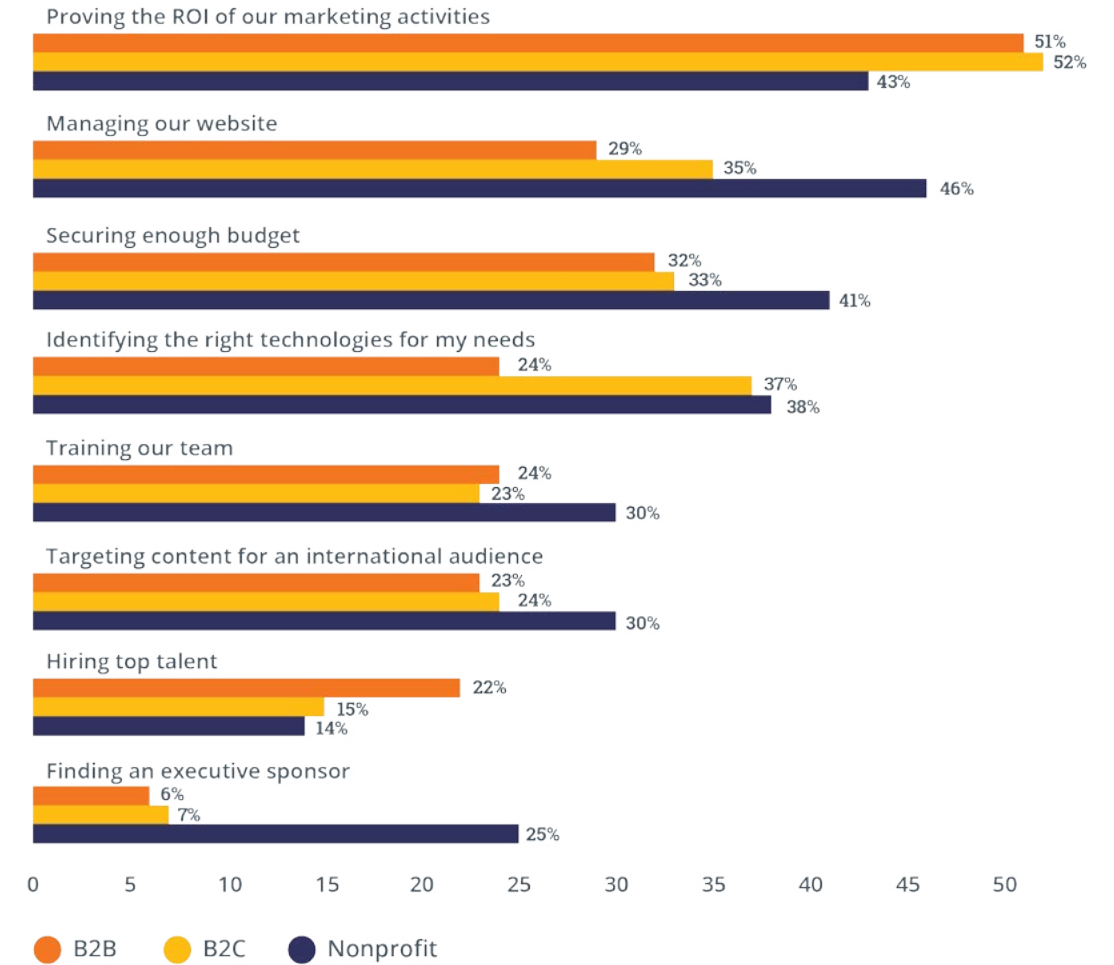
Top Challenges by Company Size

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



Top Challenges by Company Type

ROI is the thorn in the for-profit sector's side, while nonprofits struggle most with website management



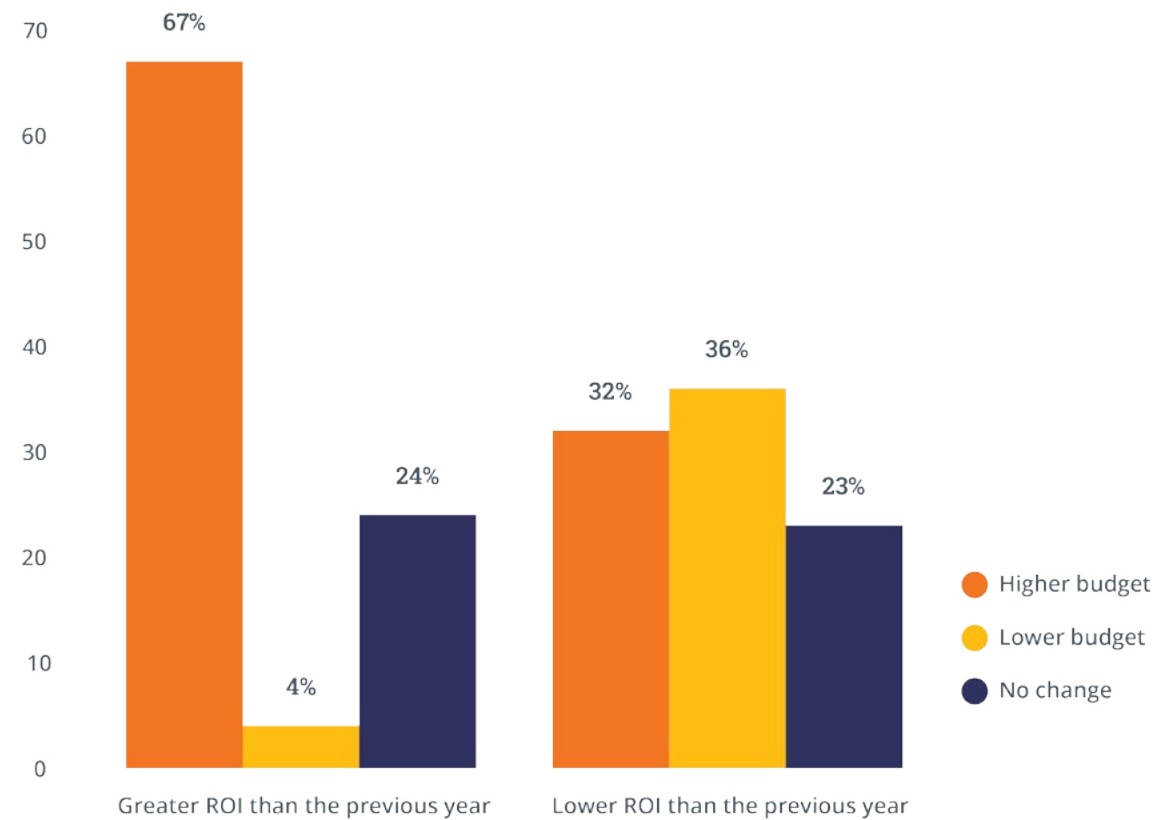
Proven ROI? Hello, budget

What did all survey respondents have in common? Everyone wants more budget. In fact, securing more budget has been the second-most pressing challenge for survey respondents the last two years running.

The key to securing more money for your team might not be that complex, however. 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 budget. Period.



Perhaps more significant? The converse is an even stronger point: Demonstrating positive ROI makes you nine times less likely to see a lower budget the following year than if your team failed to show a positive return.

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, no budget.

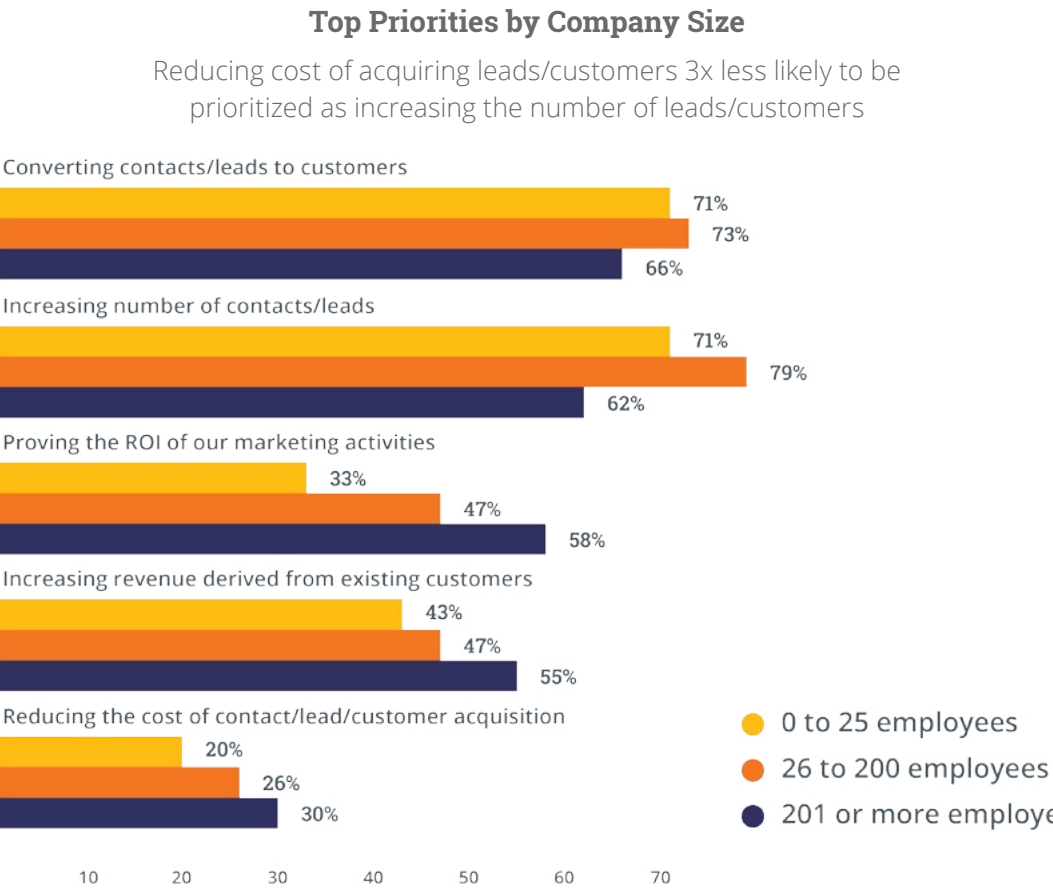
Chapter 2 Emerging Trends

Even with inbound trends continuing to develop along a fairly predictable path, there are always bound to be surprises in the findings of a report of this size and reach. In this chapter, we'll cover some of the more eyebrow-raising insights that arose from this year's data:

- Companies are worried about increasing leads and conversions, but not the cost of doing so.
- Finding an executive sponsor and training teams are priorities increasing in importance.
- Even outbound marketers say outbound marketing is overrated.
- Inbound works across B2B, B2C, and nonprofit sectors.
- Senior executives favor inbound more than managers.
- More marketers are sourcing content from outside their company.

Companies want to have their lead generation cake and eat it too

Interestingly, while the news that increasing leads and conversion rates are top priorities is to be expected, the lowest priority across company size and sectors was reducing the cost of accomplishing these two objectives. Reducing cost of acquiring leads/customers was three times less likely to be prioritized as increasing the number of leads/customers.

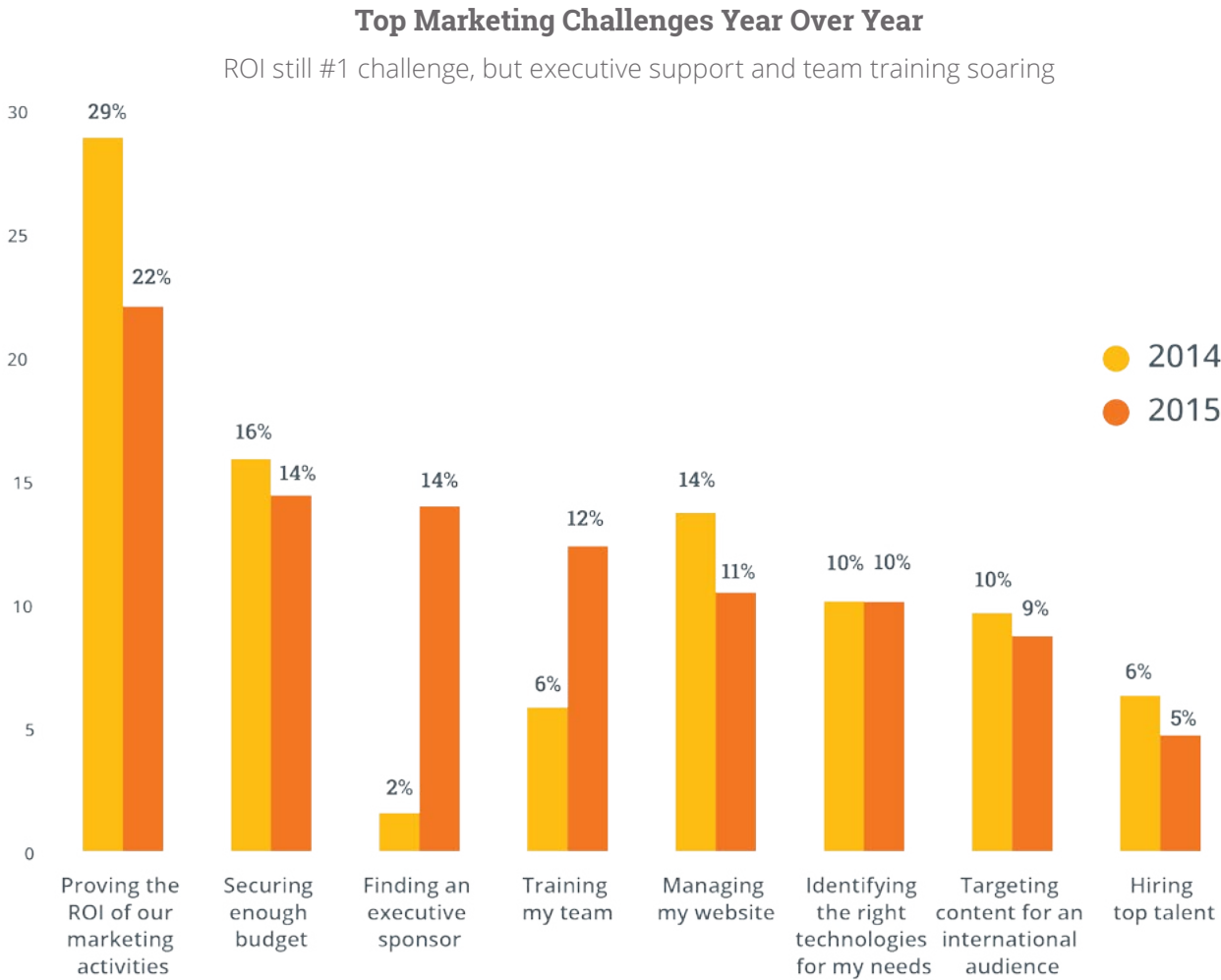


What keeps marketers up at night

While proving ROI is a paramount concern for all respondents to this year's survey, monumental shifts are occurring just below the surface.

For instance, proving ROI (though indeed still a top priority) has fallen in importance year over year. In its stead, finding an executive sponsor and training teams have surged in their perceived importance. Specifically, finding an executive sponsor was more than seven times as likely to be cited as a challenge in 2015 as it was in 2014, while training one's team was more than twice as likely to be cited.

Given the tilt of our survey toward SMBs, this makes sense -- marketers fighting tooth and nail for budget (and to prove the ROI of their dollars) are desperate to get executive gloves in their corner of the ring to secure buy-in. And the next logical step upon receiving that buy-in would be to upskill team members as they spend newly-secured budget on fresh initiatives.



Even people using outbound think it's a waste

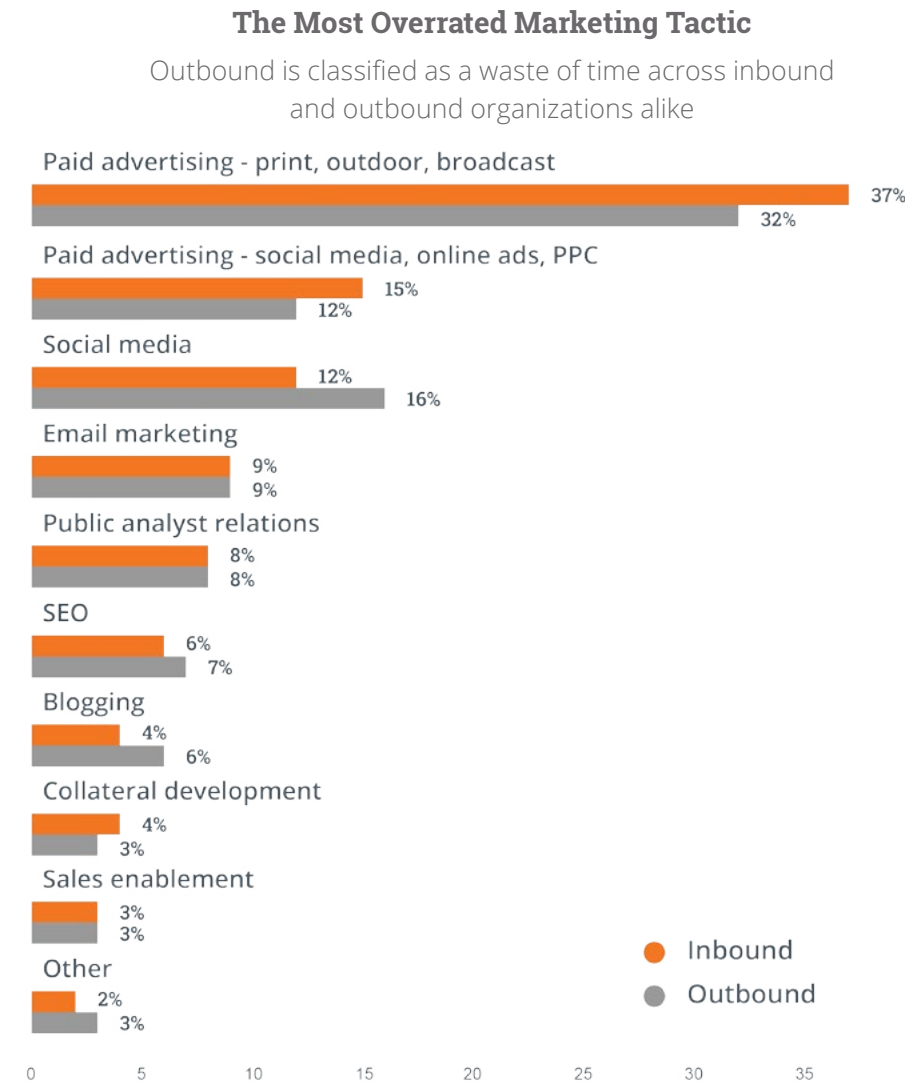
Sure, we here at HubSpot, our customers, and anyone else who's discovered the effects of inbound marketing will say that paid advertising (i.e. print ads, TV,

billboards) is a poor investment. Indeed, of respondents whose companies favor inbound marketing, 20% more named paid 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.

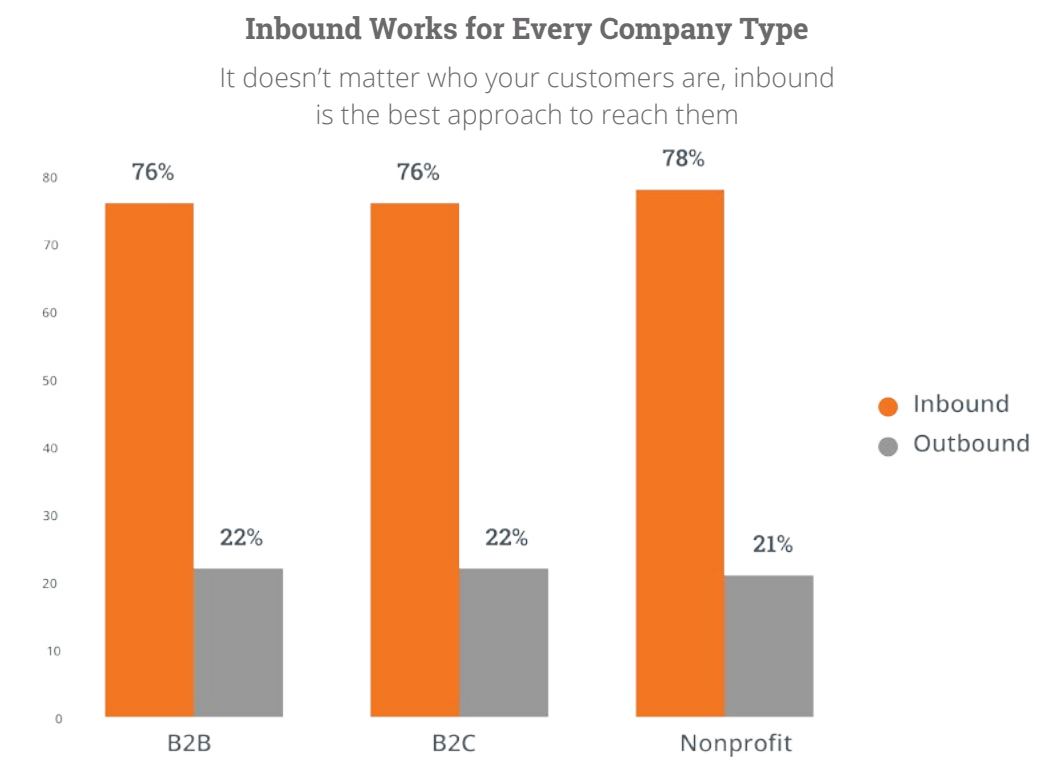
Approximately 32% of survey respondents whose companies identify as primarily outbound organizations called paid advertising the most overrated marketing tactic -- the number one answer by a wide margin.

While this could be explained by large companies (200+ employees) throwing money at paid as a sort of diversification of their marketing portfolio, it bears repeating that the smart money is on inbound.



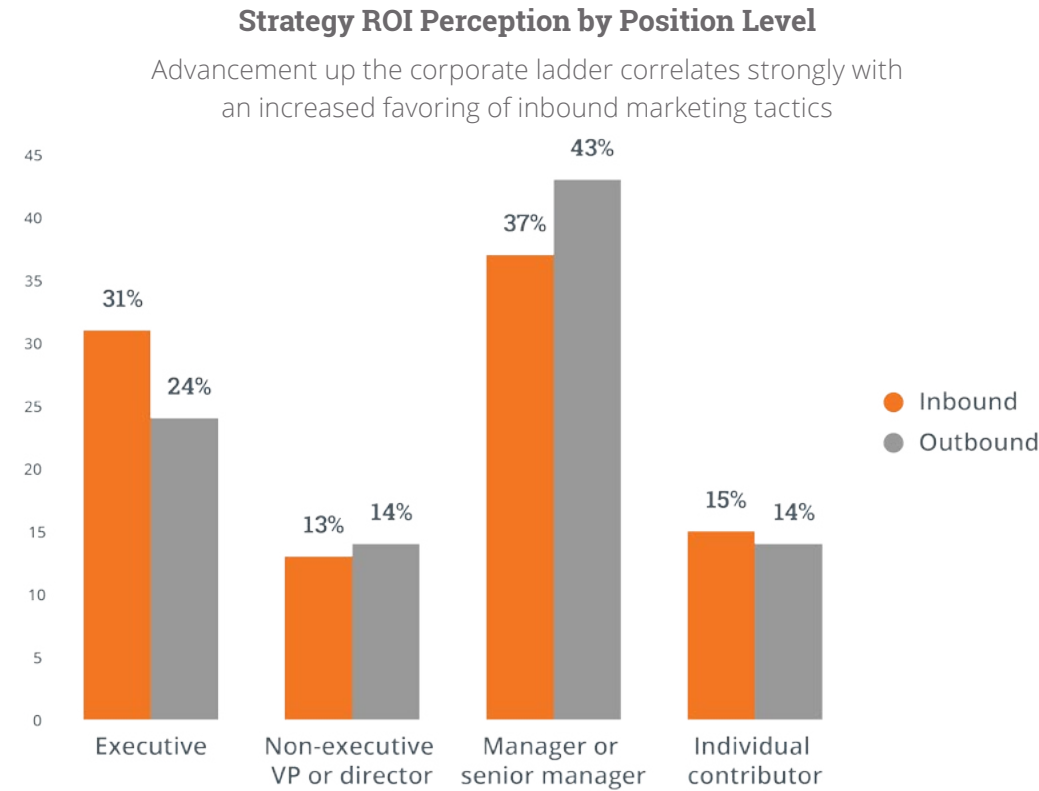
Inbound works for B2B, B2C, and nonprofit

Think inbound marketing isn't for you? Guess again. Of the nearly 4,000 people we surveyed, inbound had a 75% likelihood of being the marketing approach of choice, while outbound had only a 25% chance. This 3:1 ratio remained consistent across all company types (B2B, B2C, and nonprofit).



Senior executives favor inbound more than managers

Our data showed that the farther you advance in your company, the more likely it is you'll favor inbound approaches. Among managers or senior managers, outbound is perceived to be the best marketing approach in terms of generating ROI. Inbound catches up to outbound at the non-executive VP/director level, and passes it at the executive rank (executive-level personnel represented over a third of all survey respondents).

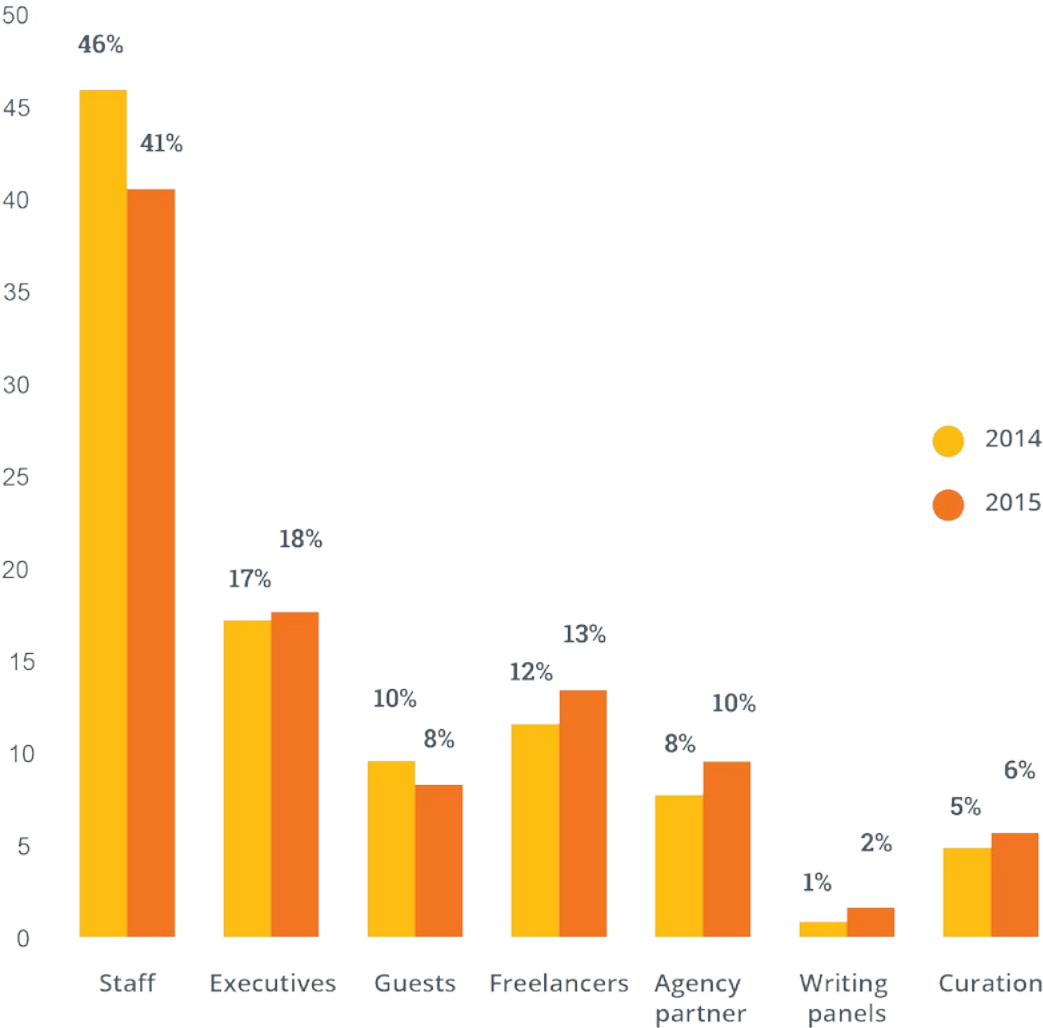


Marketing content creation no longer limited to in-house writers

According to the tenets of inbound marketing, marketers should create compelling content that reflects their company's voice and brand while helping the consumers of this content turn into website visitors, leads, and customers. However, the people capturing that unique voice and providing that value don't always need to be your own employees. This year's data showed an increase in the number of respondents who indicated they use freelancers and agency partners for content creation.

Who Writes Your Marketing Content?

The use of freelance and agency talent is on the rise



Chapter 3

Best-in-Class Marketing Practices

At this point, we've seen some surprises, and we've also seen areas of steady and logical progress. In addition, we know what everyone wants -- more ROI, more leads and conversions, and more budget.

One benefit of our survey's scale is that we can "copy off the smart kids," so to speak. Let's dive into what the companies with the highest return on their marketing dollars are doing:

- Inbound efforts achieve higher ROI than outbound regardless of company size or total marketing spend.
- Leading marketers resist the allure of paid campaigns and recognize outbound as being overrated.
- Best-in-class marketers 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.
- The best marketers check their marketing analytics 3+ times per week.

Leading marketers make their dollars go farther

Inbound is the preferred marketing method for all companies that spend under \$5M annually on marketing. In fact, if your organization spends less than \$100,000 on marketing annually, you're four times more likely to practice inbound than outbound.

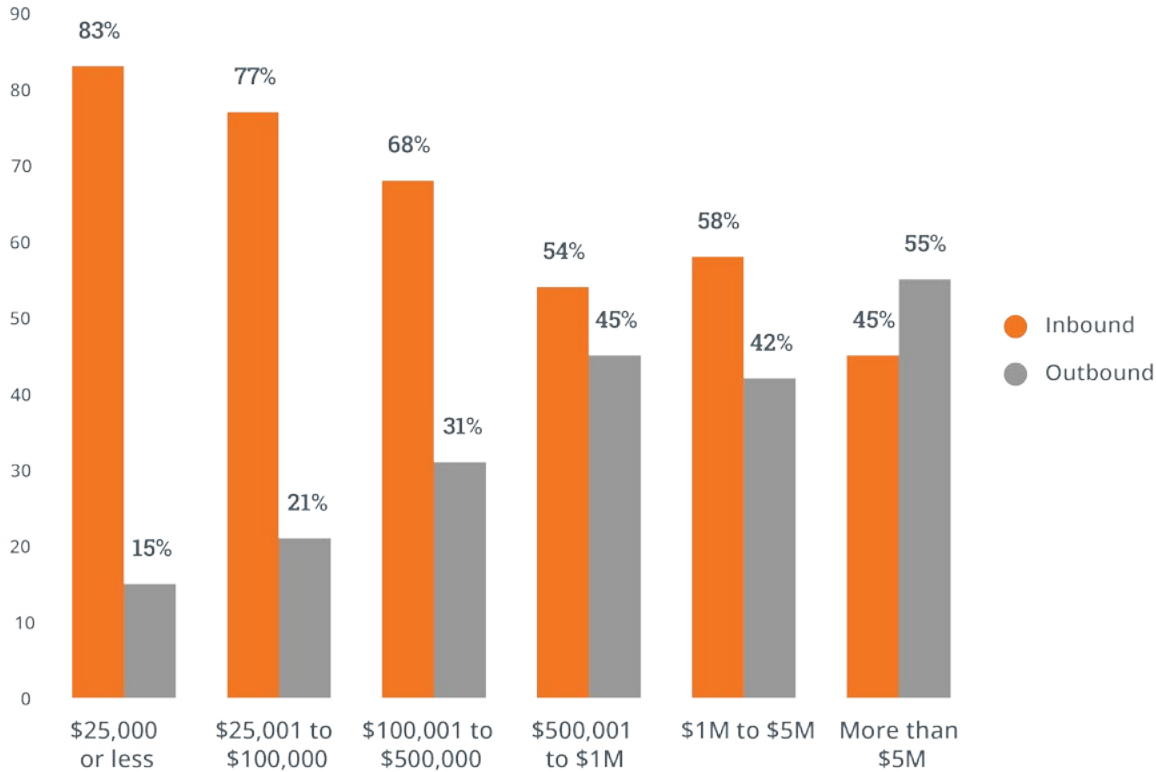
Even more interesting? Every company we surveyed -- regardless of marketing spend -- was three times as likely to see a higher ROI on inbound marketing campaigns than on outbound.



COMPANIES ARE 3X AS LIKELY TO SEE HIGHER ROI ON INBOUND MARKETING CAMPAIGNS THAN ON OUTBOUND.

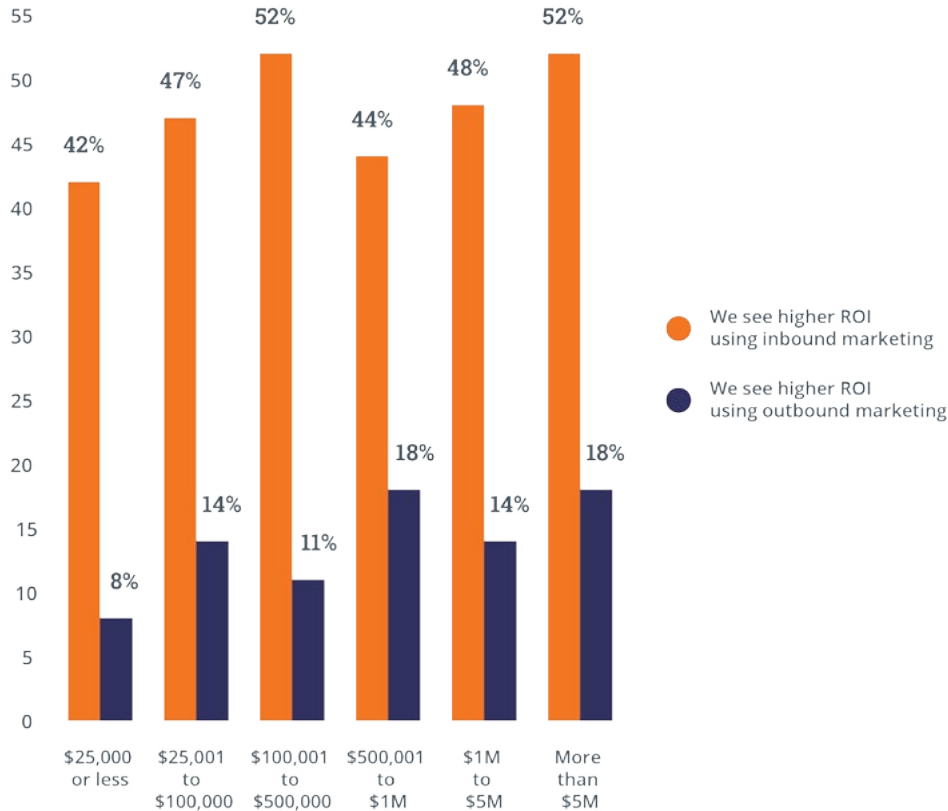
Inbound vs. Outbound by Marketing Spend

Inbound is the way of the lean 'n' mean shop



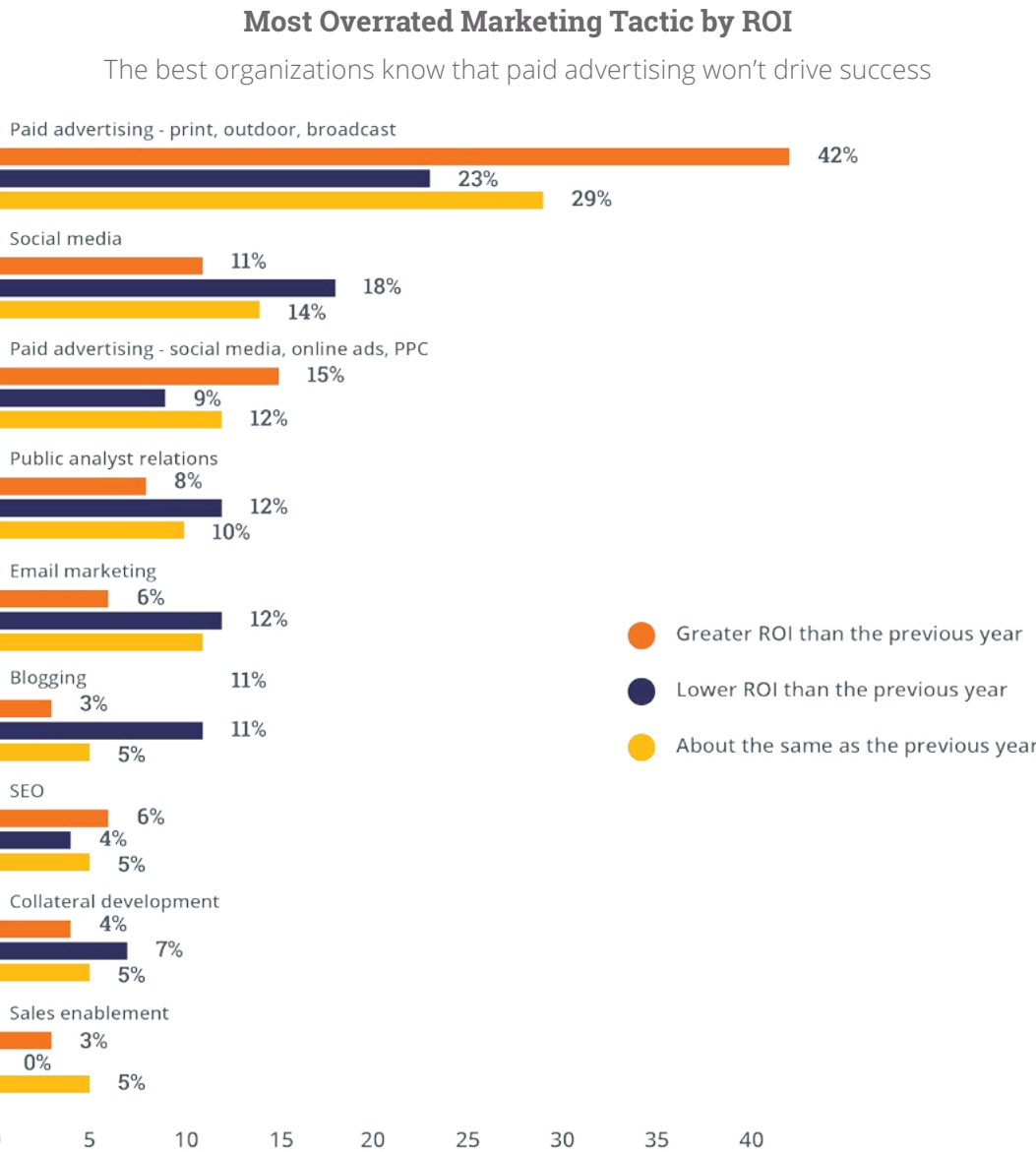
Inbound vs. Outbound ROI by Marketing Spend

Big budget or small -- everyone gets big returns from inbound



Leading marketers take outbound with a grain of salt

In many ways, our data showed that outbound lives in inbound’s shadow. Fifty-seven percent of respondents from companies that saw greater ROI in 2015 than 2014 cited paid advertising as the most overrated marketing tactic. The next-closest item had only an 11% chance of being cited.

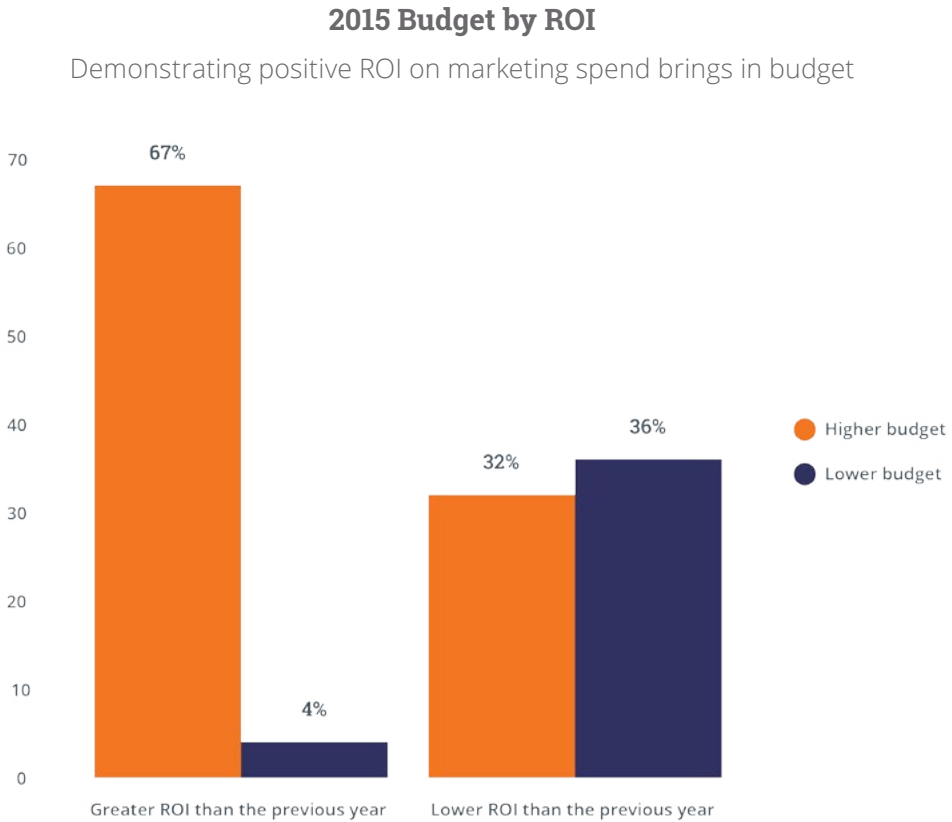
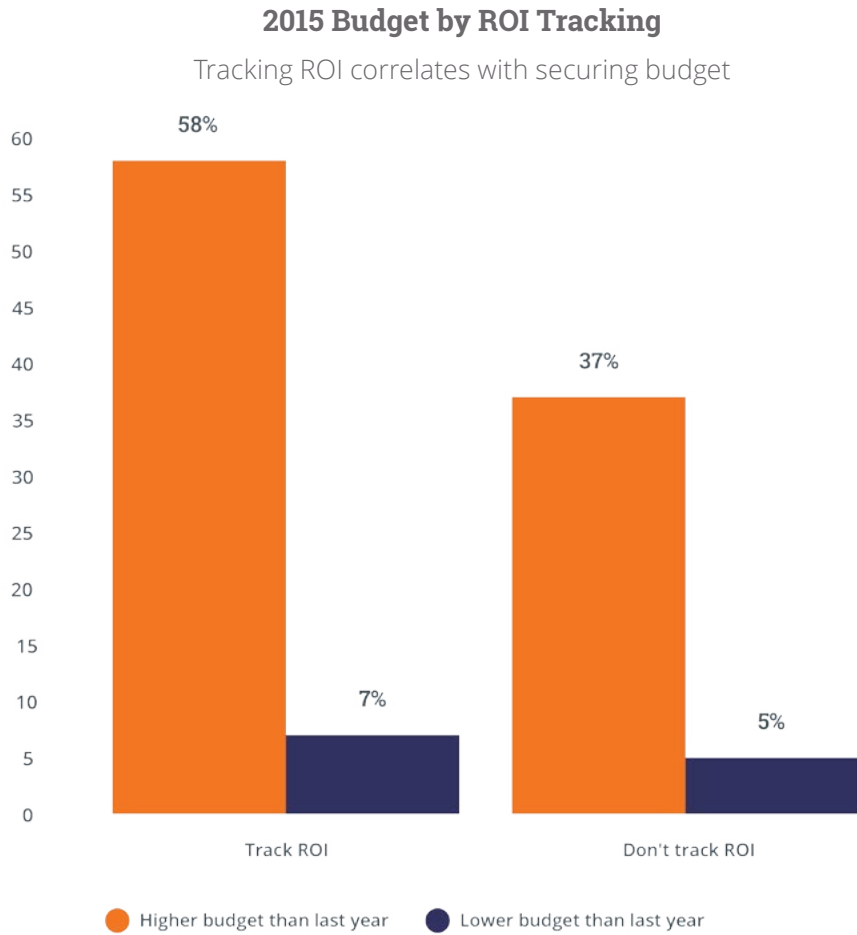


Leading marketers track ROI, prove success, and reap the rewards

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

Respondents were 20% more likely to receive a higher budget in 2015 if ROI was tracked in the first place, and 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 nine times more likely to receive a lower budget if they failed to demonstrate a positive ROI.

With this in mind, there is a strong case to be made for dedicating time and resources to establishing links between marketing activity and results.

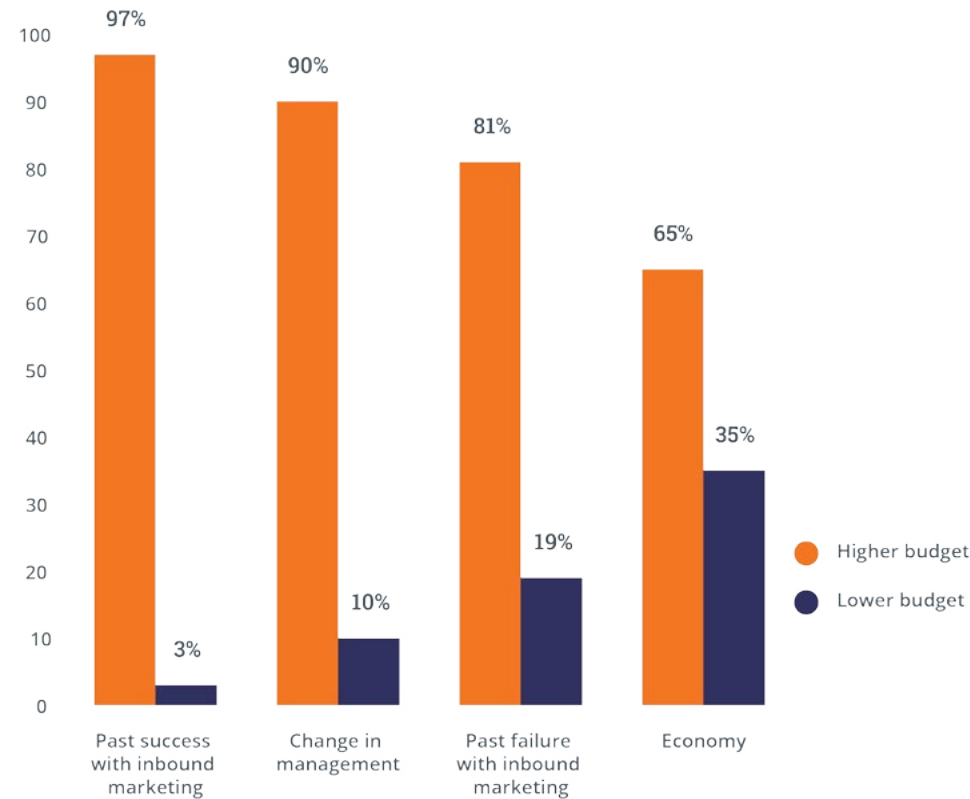


Leading marketers let results drive decisions

We asked our respondents to identify the factors that caused a change to their inbound budget. As was the case in 2014, no single factor was more important in driving a higher inbound budget than past success with inbound marketing. However, past failure with inbound also resulted in higher budget. Of those who failed with inbound last year, 81% increased budget as a result.

What does this mean? Top marketers realize that inbound is a long game. If you get off to a slow start, you shouldn't back off. In fact, you might consider doubling down.

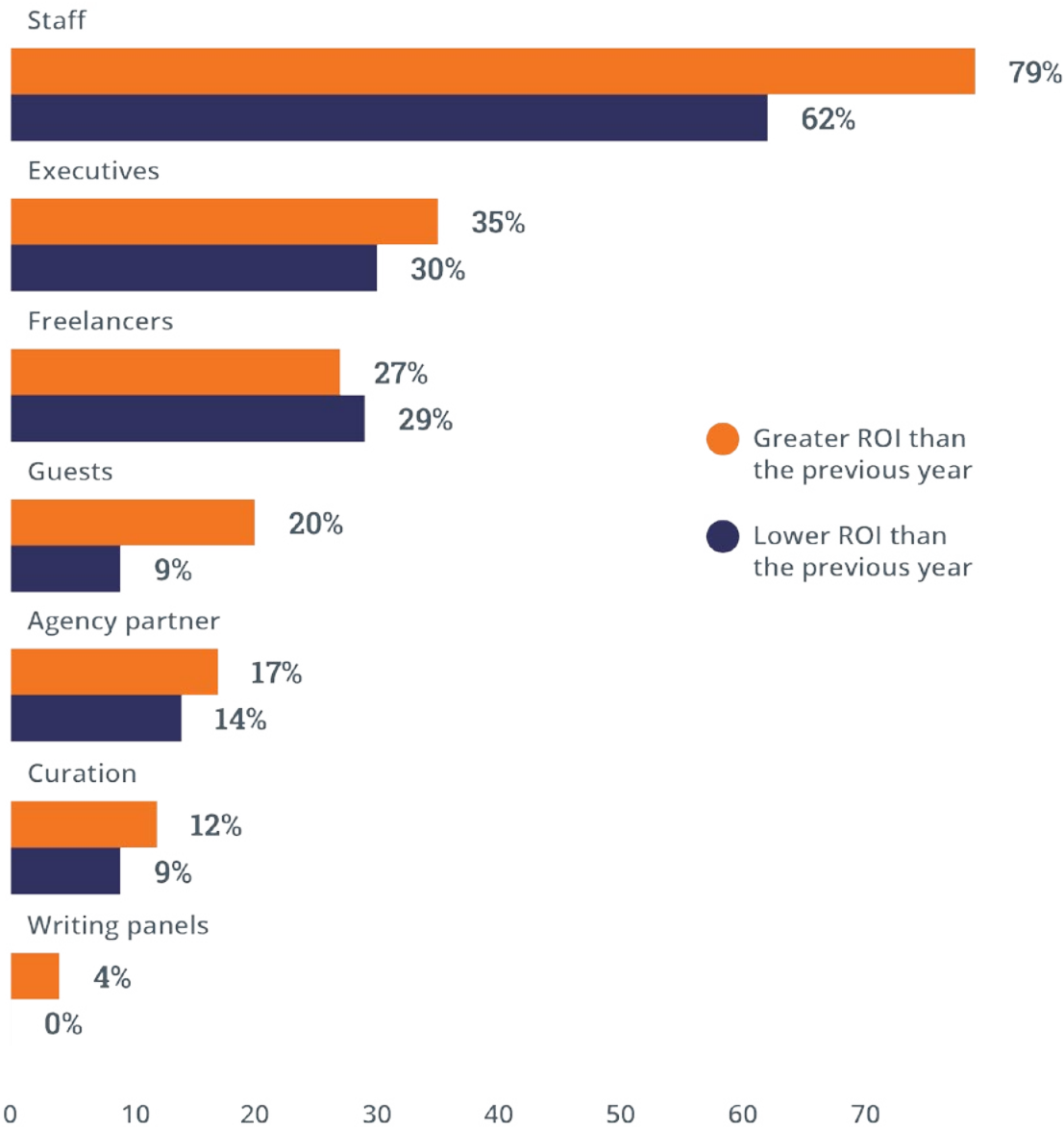
2015 Budget by Budget Change Factors
Past success with inbound marketing is the best way to secure higher budget



Leading marketers' content comes from in-house and out

The most successful marketing organizations launch a balanced attack on churning out compelling content. In particular, organizations 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



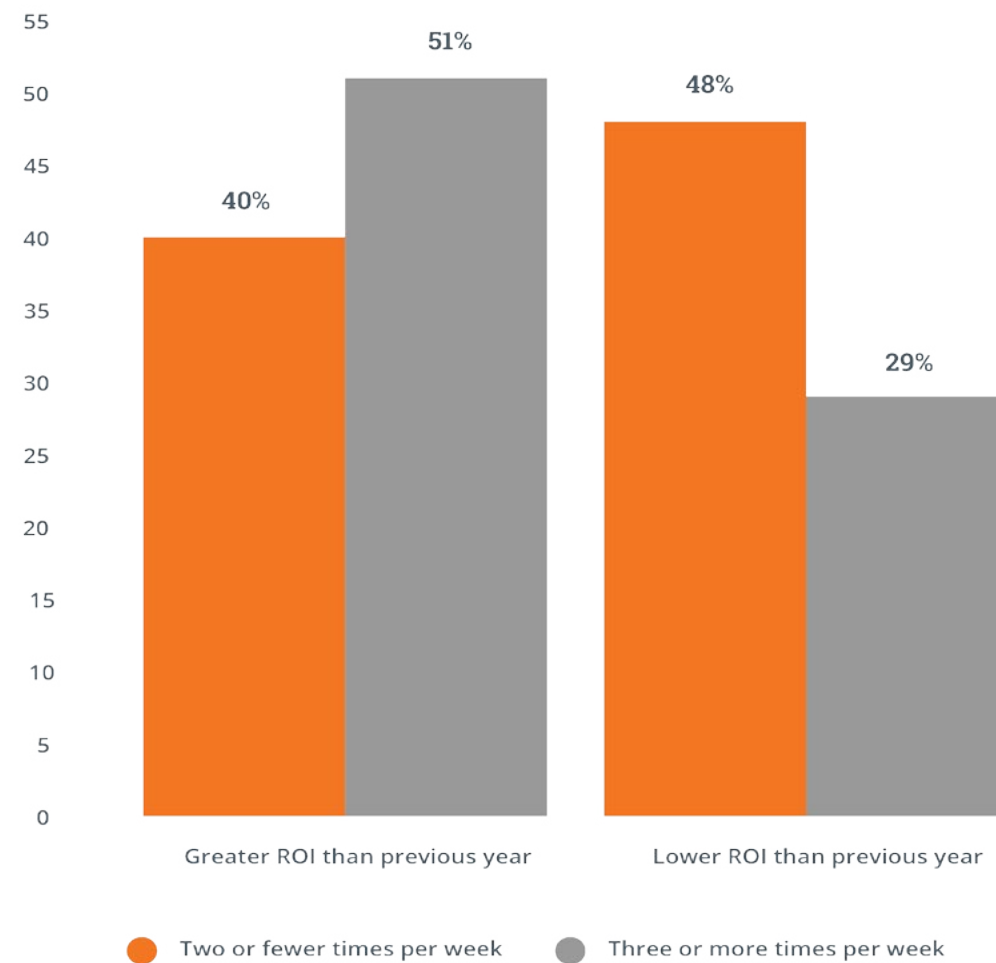
Leading marketers check their analytics frequently

We all know the adage “what gets measured gets managed.” But is it true?

According to our data, it is. Respondents who achieved greater ROI in 2015 than the previous year were approximately 20% more likely to check their marketing analytics three or more times per week (or have someone on their team do so).

How Often Do You Check Marketing Analytics?

Leading marketers check their analytics more often than laggards



Chapter 4

Setting Up for Inbound Success

20%

MARKETERS WHO CHECK THEIR METRICS 3X+ TIMES A WEEK ARE OVER 20% MORE LIKELY TO ACHIEVE POSITIVE ROI.

You’ve gotten a glimpse into some of the practices and strategies of the best marketing departments worldwide. But how do they actually implement inbound?

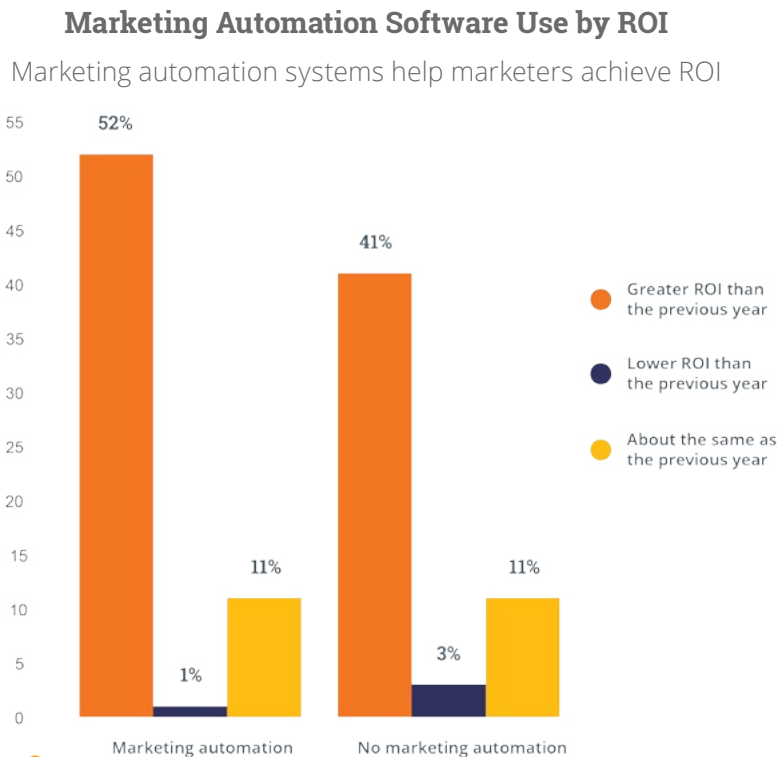
In this chapter, we’ll divulge how leading marketers ascend to the top. What tools do they use? What sort of relationship do they maintain with Sales? How do they think about their metrics (and how often)? This section has the answers:

- Leading marketers use marketing automation software.
- They are involved in the sales software decision-making process.
- They look at their marketing metrics 3+ times per week.
- Teams that secure budget track their ROI.
- SLAs between Marketing and Sales yield more ROI, more budget, and more headcount.

Leading marketers use marketing automation software

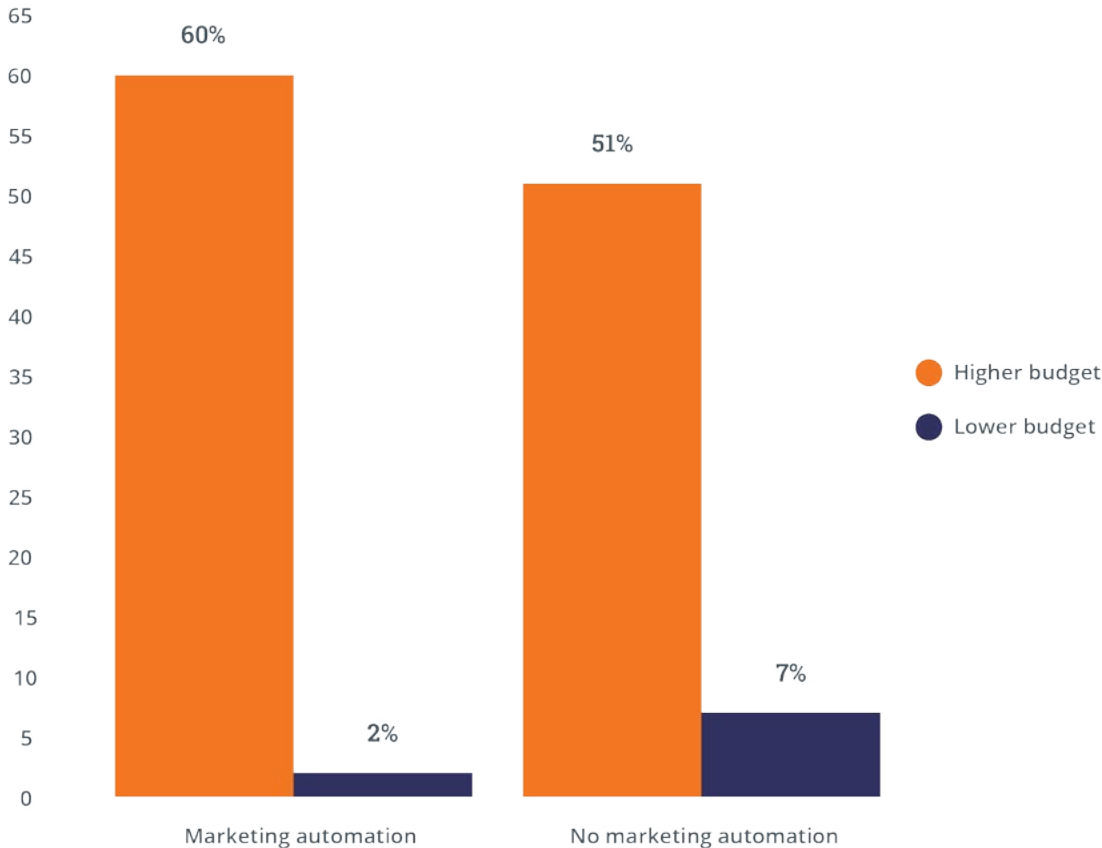
The main tool in top marketers’ arsenals is a platform for automating their team’s marketing efforts. While our respondents indicated using an array of specific products, the larger trend was telling: The guys at the top use marketing automation software in some form or another.

Specifically, those who saw a higher marketing ROI in 2014 were more likely to have used marketing automation software than not. In addition, those same respondents were more likely to see more budget unlocked as a result, and had almost no chance of receiving a lower budget.



Marketing Automation Software Use by Budget

Marketing automation software users have almost no chance of receiving a lower budget



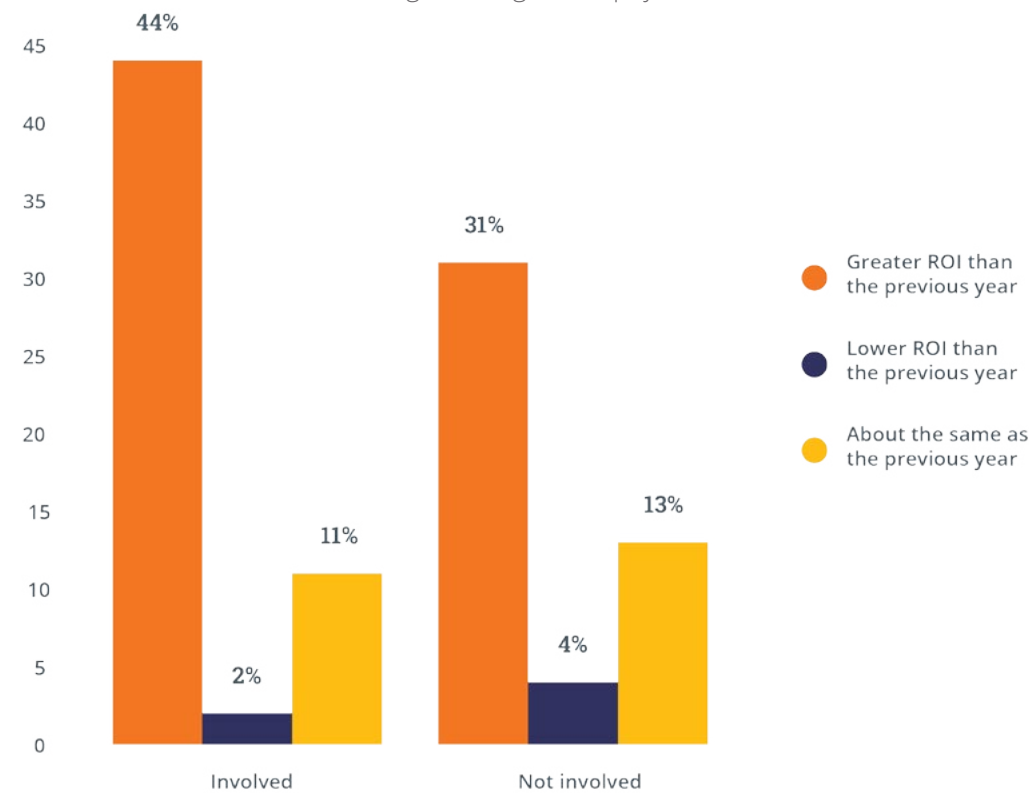
Leading marketers are involved in sales software purchase decisions

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 13% more likely to see a positive ROI, and 11% more likely to receive an increased budget.

MARKETERS WHO WERE INVOLVED WITH SALES SOFTWARE SELECTION WERE 13% MORE LIKELY TO SEE A POSITIVE ROI, AND 11% MORE LIKELY TO RECEIVE AN INCREASED BUDGET.

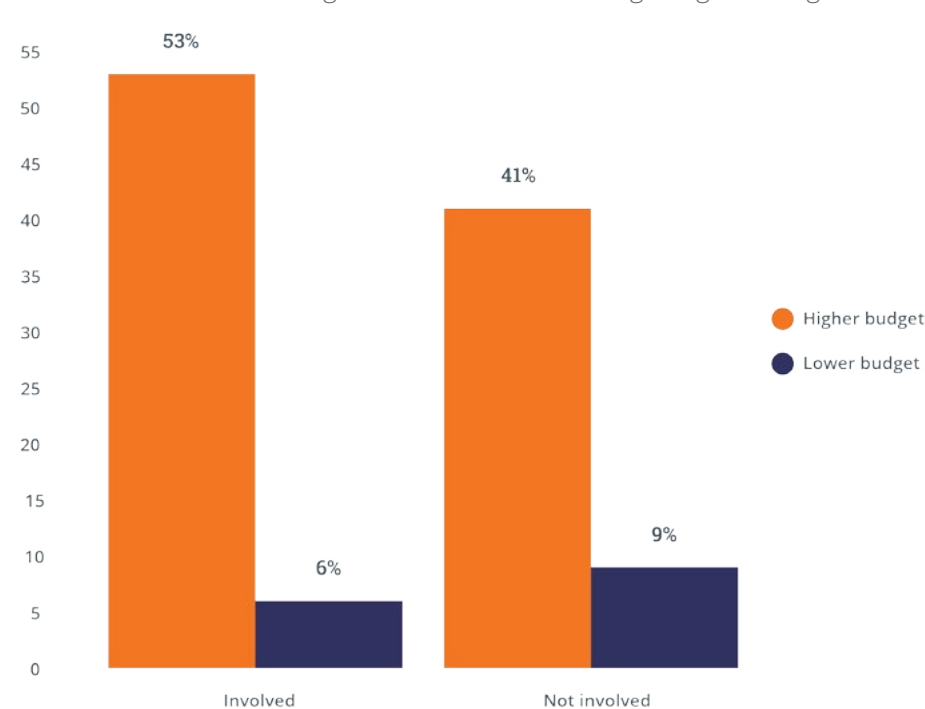
Marketing's Involvement in Sales Software Decisions by ROI

Smarketing tech alignment pays off in ROI



Marketing's Involvement in Sales Software Decisions by Budget

Marketers who get involved in sales tech get higher budgets

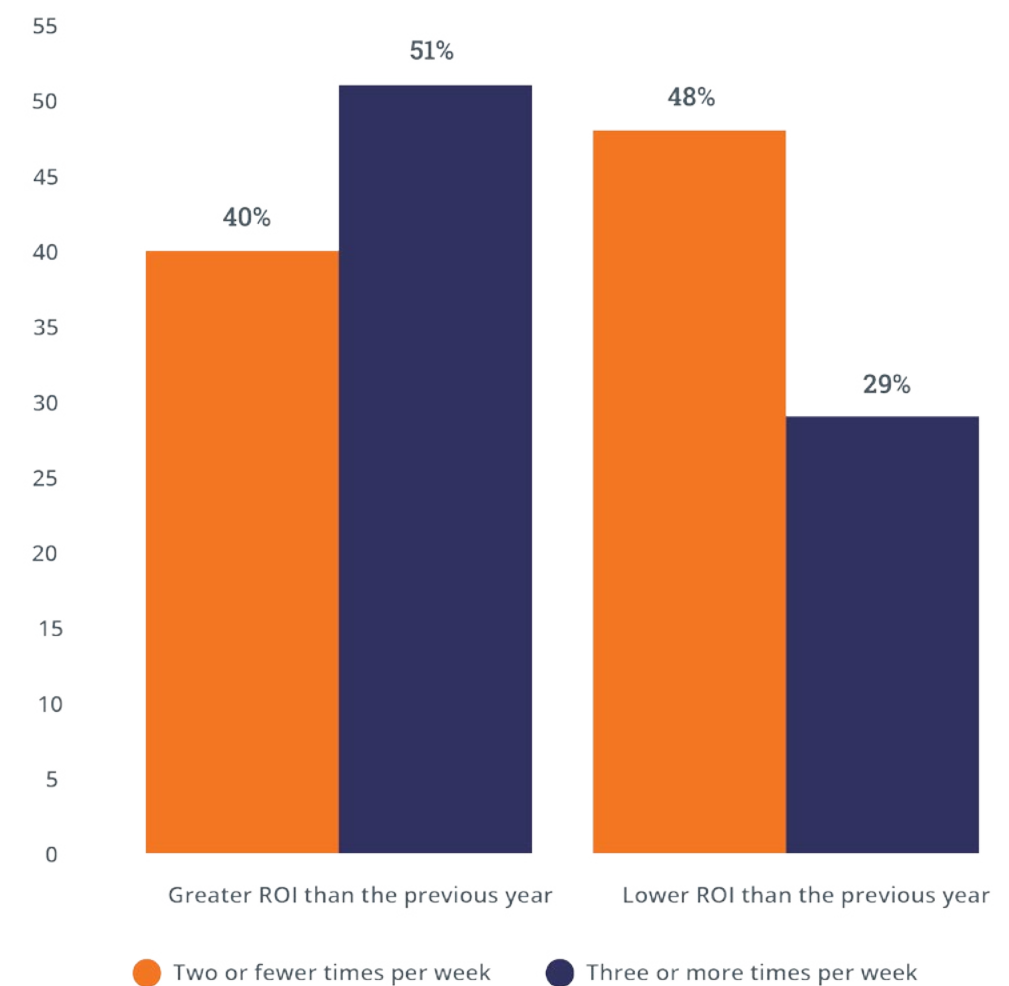


Leading marketers check their metrics religiously

Respondents whose teams checked marketing metrics three or more times a week were over 20% more likely to see an increased ROI in 2015.

Frequency at Which Marketers Check Metrics by ROI

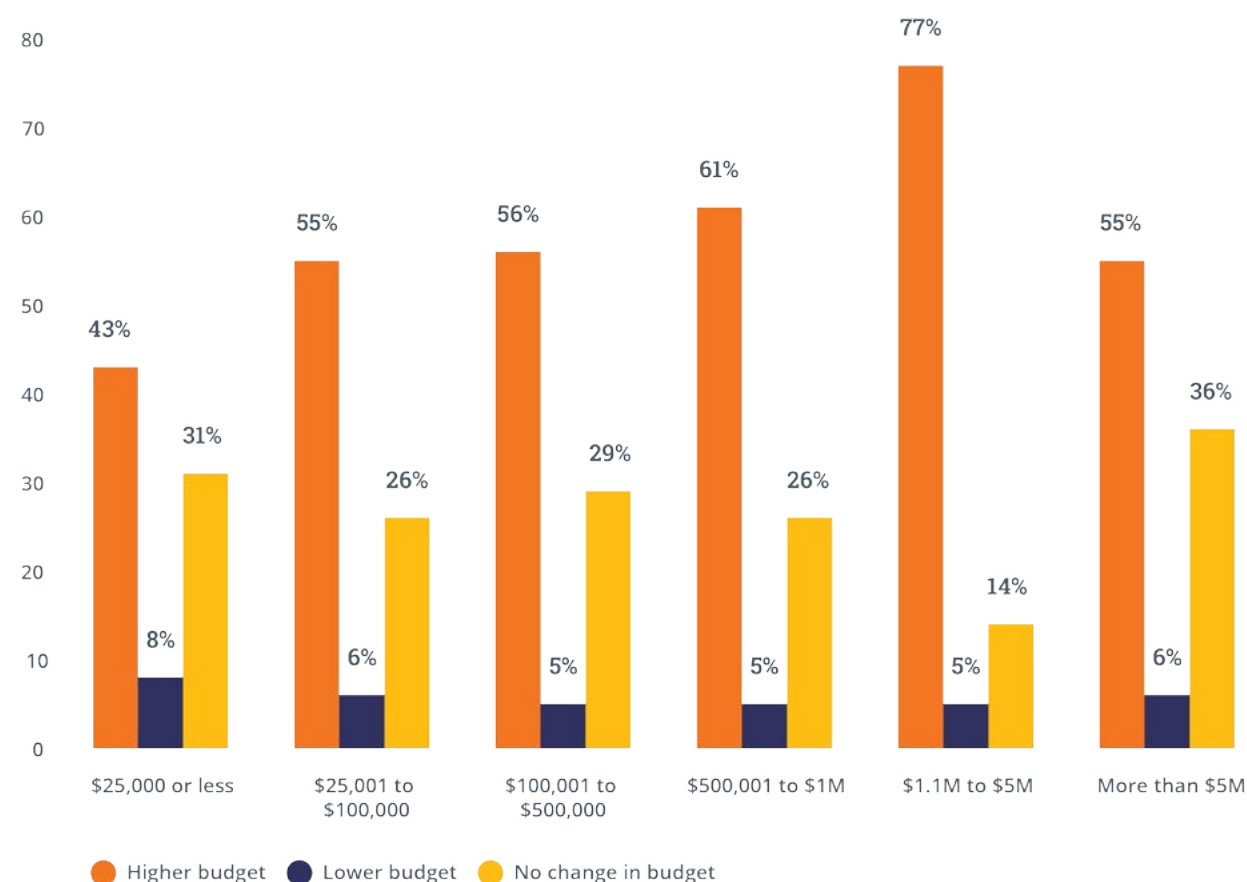
Apparently, watched pots do boil



Big budgets, big boosts

How do the best marketers secure budget? Our data revealed that the more budget marketers have to begin with (until they hit the five million dollar ceiling), the more they're likely to receive next year. More than half of all marketers with budgets over \$25,000 saw a bump in funds since last year.

Budget Increases by Marketing Spend
The more you have, the more you'll likely receive

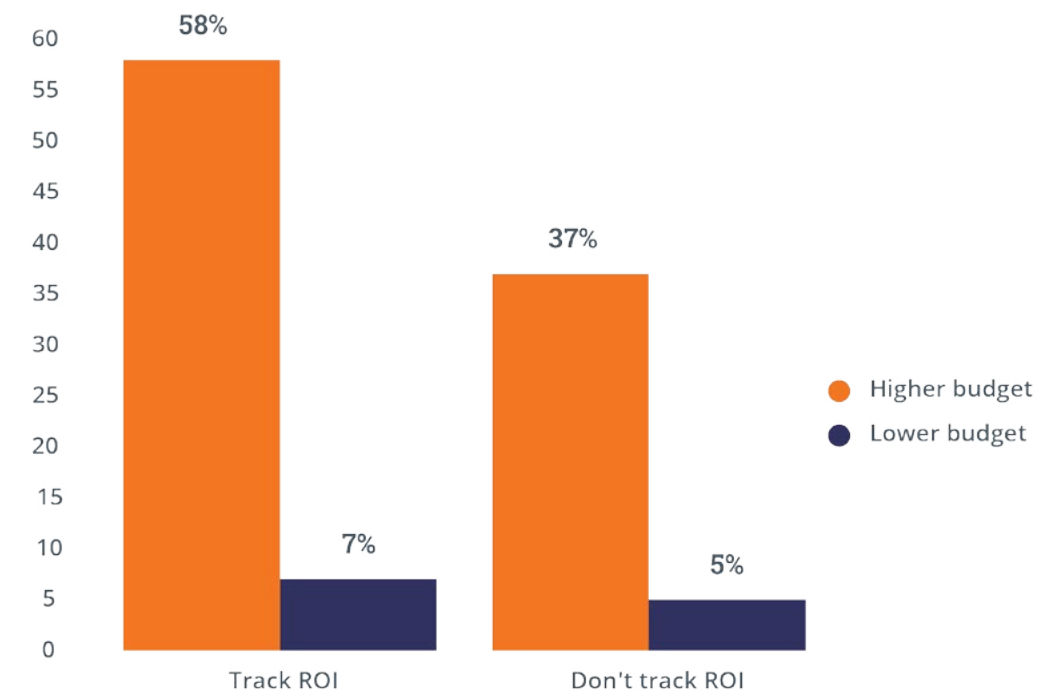


If you're an SMB marketer tirelessly campaigning for each and every dollar, you might despair looking at this chart. But consider that a solid 43% of marketers with budgets under \$25,000 received a budget increase in 2015, and for 31%, the level of funding held steady. And if you were one of the 8% whose budget was slashed? Poor ROI tracking could be to blame.

Best-in-class marketers track ROI

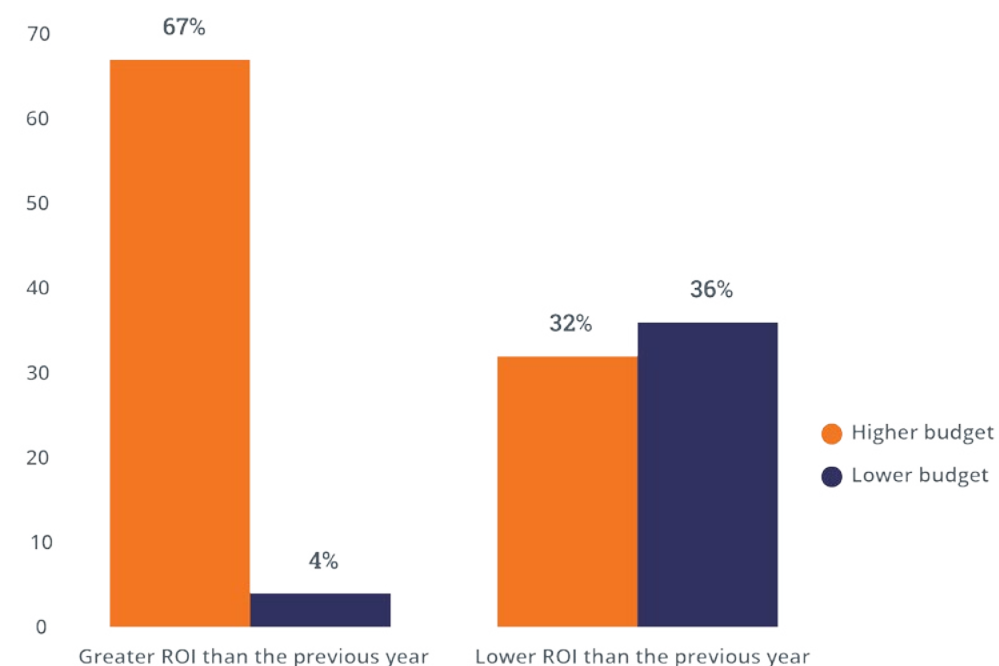
We'll say it again -- the key to unlocking budget lies in data proving ROI. And the only way to have that data is to track it in the first place. Respondents who tracked ROI were over 20% more likely to receive higher budget than their counterparts who failed to keep tabs.

2015 Budget by ROI Tracking
Tracking ROI correlates positively with budget increases



Track the return on your spend, friends. Your budget will thank you. Indeed, if you demonstrate higher ROI, you're twice as likely to secure more budget. If you fail to demonstrate positive ROI, you're nine times more likely to see a decrease in budget. We can no longer afford to be loose about ROI tracking.

2015 Budget by ROI
Prove your ROI, and the budget will roll in

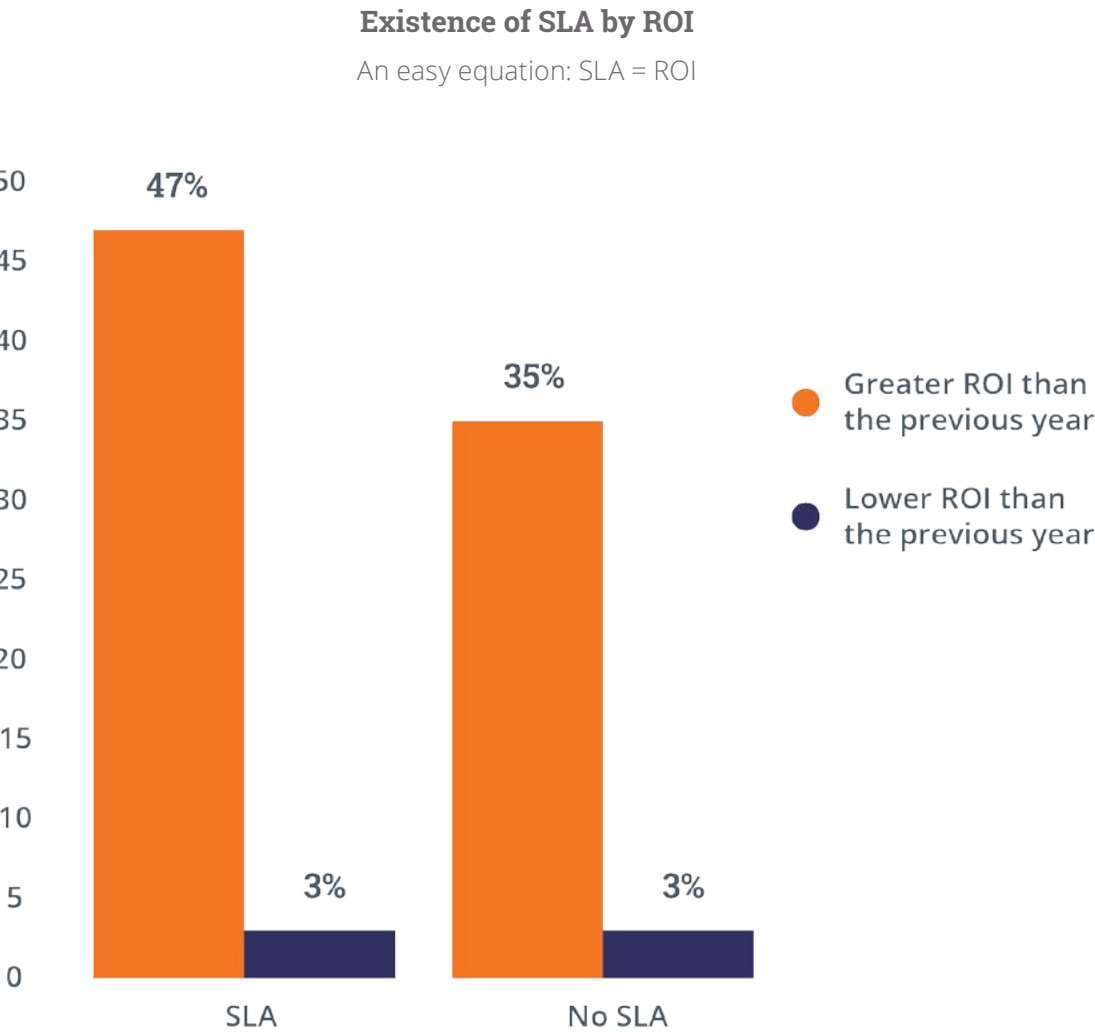


SLAs correlate with success

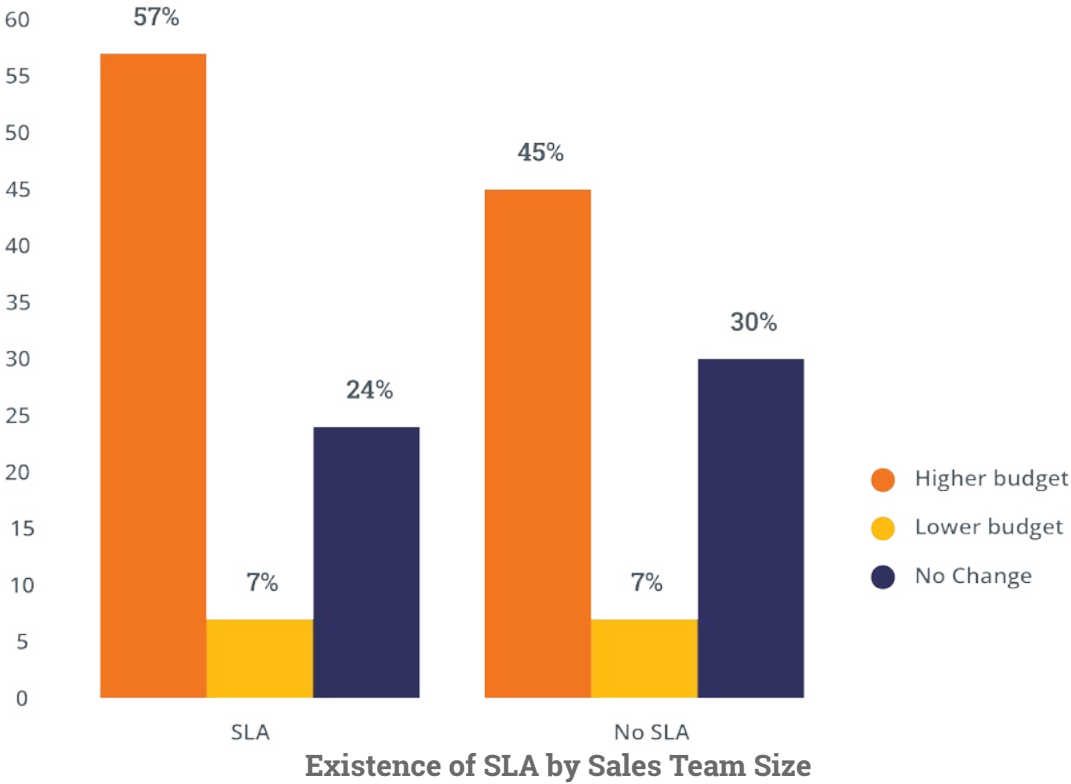
You might think that all of this inbound glory rests solely on the shoulders of a company's capable marketers.

It doesn't. Inbound success is a team effort, and requires strong alignment between Sales and Marketing. The organizations getting the most out of their marketing budget (and getting more of it) tend to be partnered tightly with Sales.

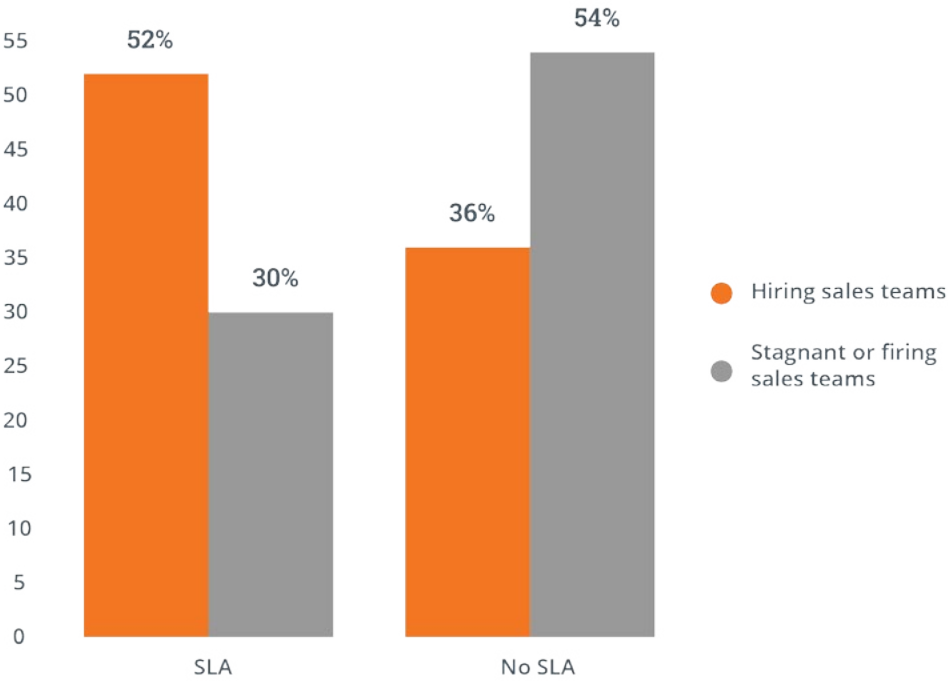
Of our respondents, those who had a formal agreement between Sales and Marketing were more likely to see higher ROI on marketing dollars in 2015, receive a budget increase, and expand their sales teams. Get an SLA if you don't already have one.



Existence of SLA vs. 2015 Budget
When Sales and Marketing are aligned, marketers get more budget



Existence of SLA by Sales Team Size
Strike an agreement with Sales, and watch the team grow



Chapter 5

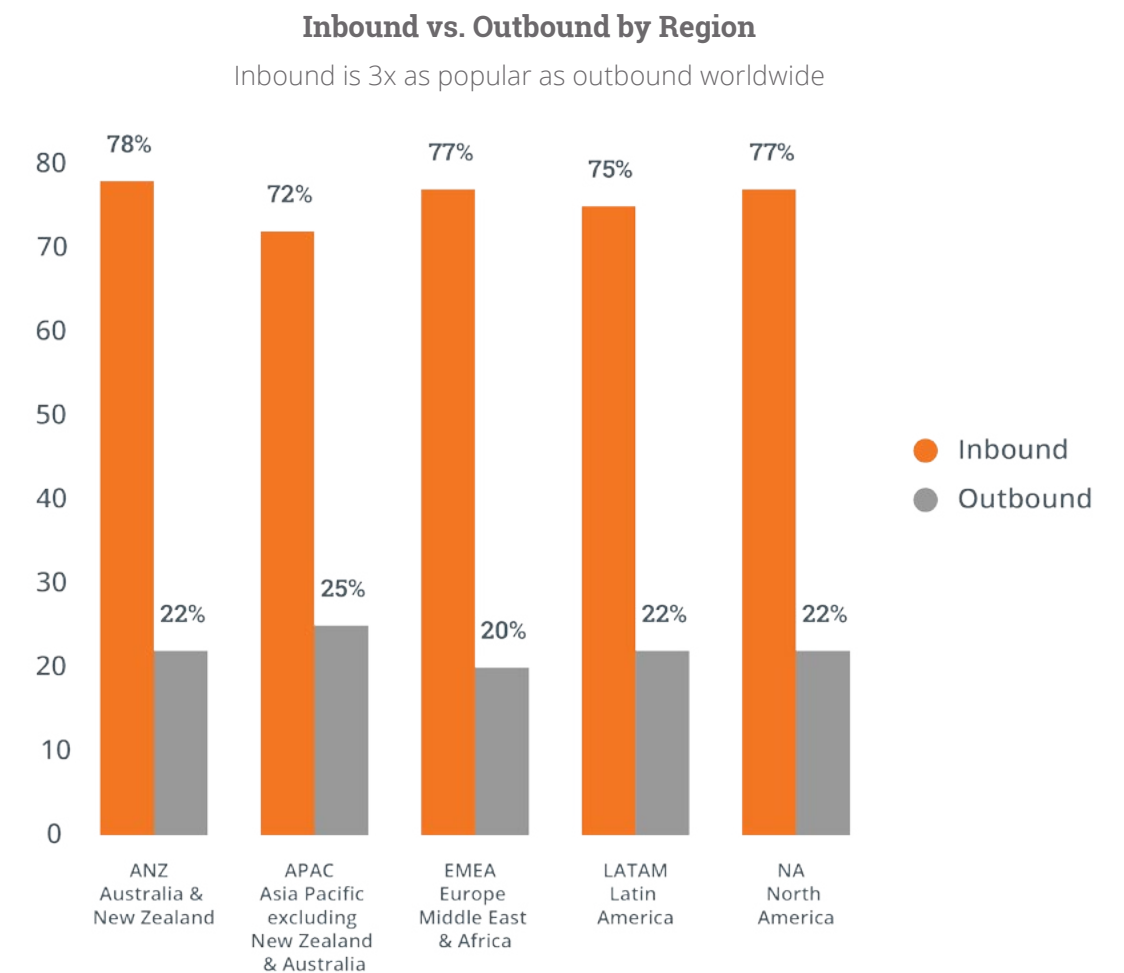
International Inbound

The State of Inbound survey doubled down on international data this year. With respondents from 150 different countries, we gathered the data into six primary regions to get a feel for who's leading the international inbound community:

- Inbound marketing is effective globally.
- While APAC worries about tailoring content to international audiences, LATAM is preoccupied with identifying the right tech.
- North America tracks ROI most reliably, demonstrates more positive ROI, and checks marketing analytics most frequently.
- International marketing communities lag behind on securing an SLA with their sales organizations.

The world is in on inbound

One thing's for sure: The global community is united in their favor of inbound practices. In all five international regions, a 3:1 ratio emerged between those who considered their organization inbound-driven versus outbound-driven.

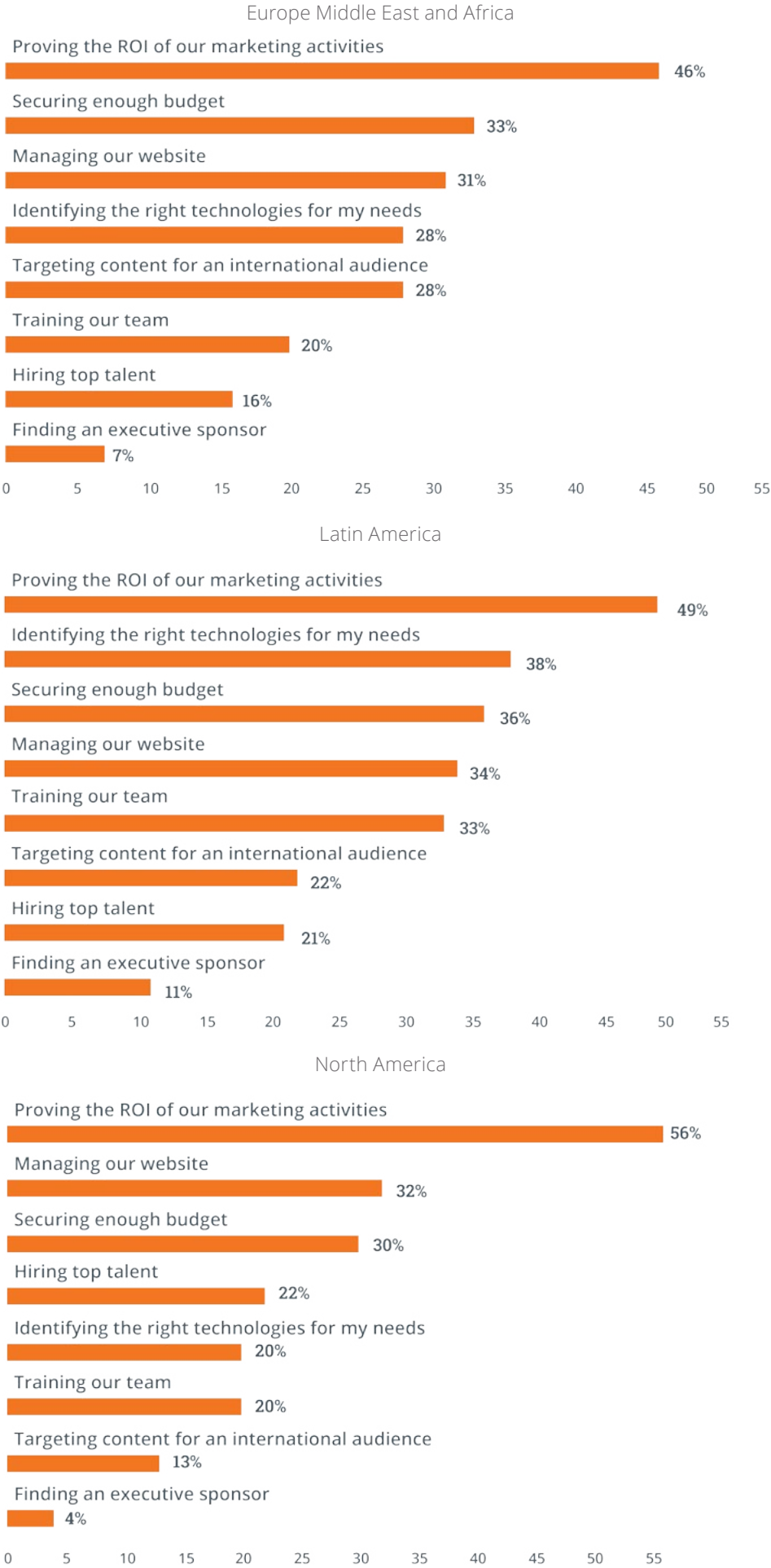
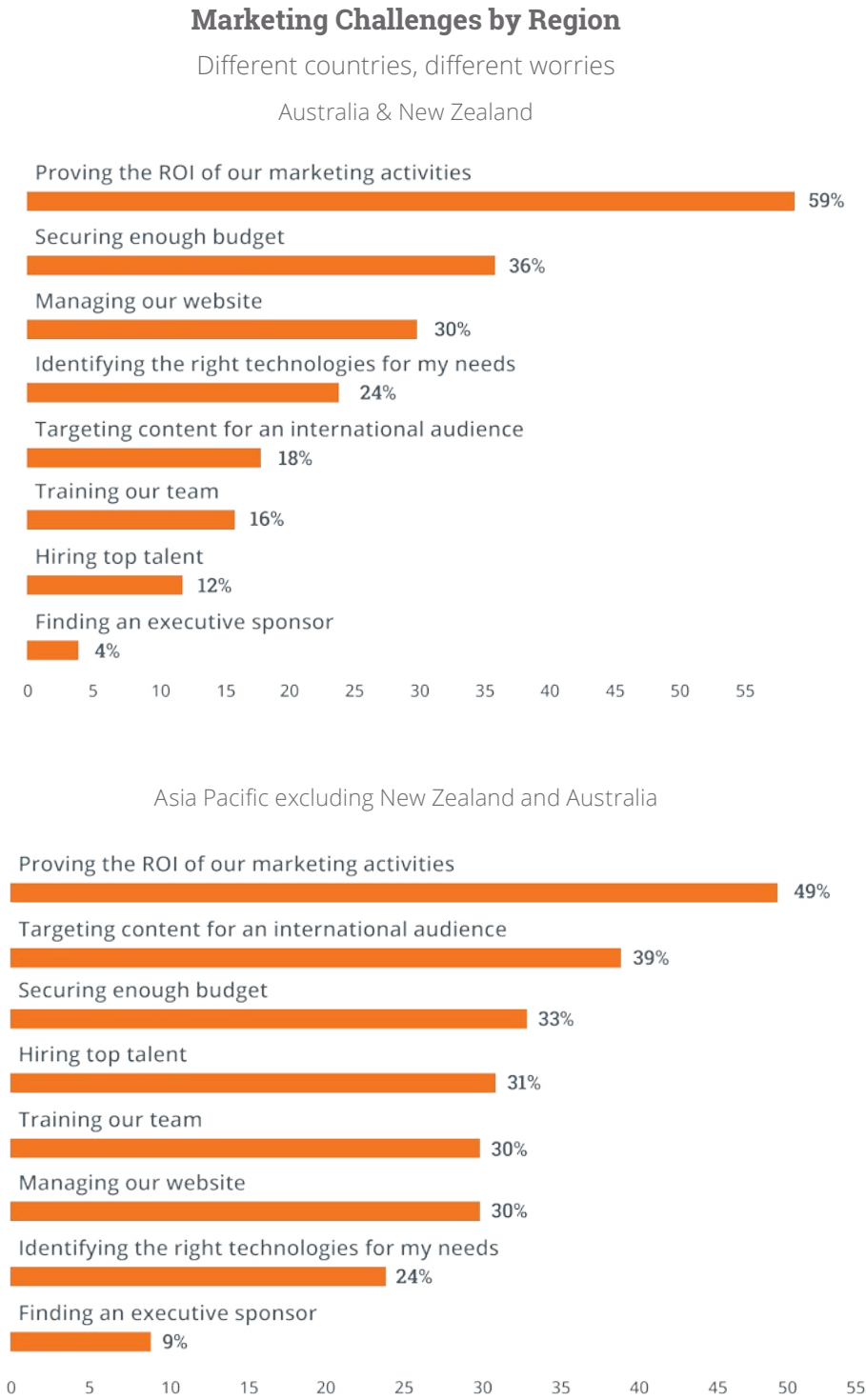


What concerns U.S. marketers might not concern global colleagues

While the marketing world stands united in favor of inbound, it doesn't mean

that each region works the same way. To wit, several differences emerged in how various international regions think about their marketing challenges.

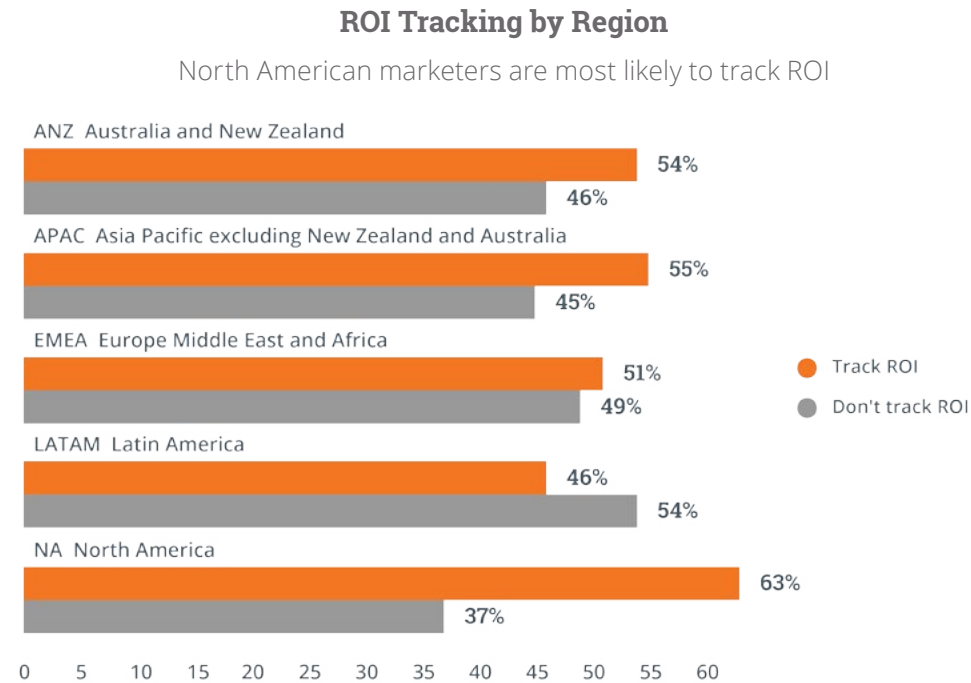
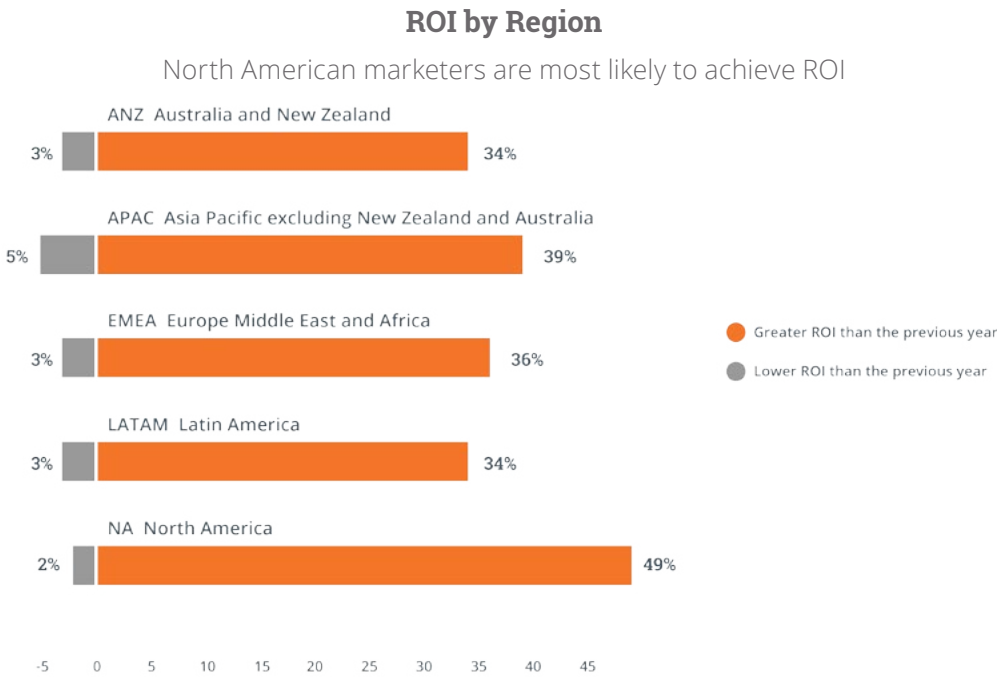
Compared to other regions, Australia, New Zealand, and North America all are proportionally less concerned with training, and more concerned with proving ROI. The Asia Pacific region (excluding Australia and New Zealand) was on average 17% more likely to cite tailoring their content to an international audience as a challenge than other regions. On the other hand, Latin America is proportionally more concerned with identifying the right technologies than other global regions.



North America leads in ROI tracking

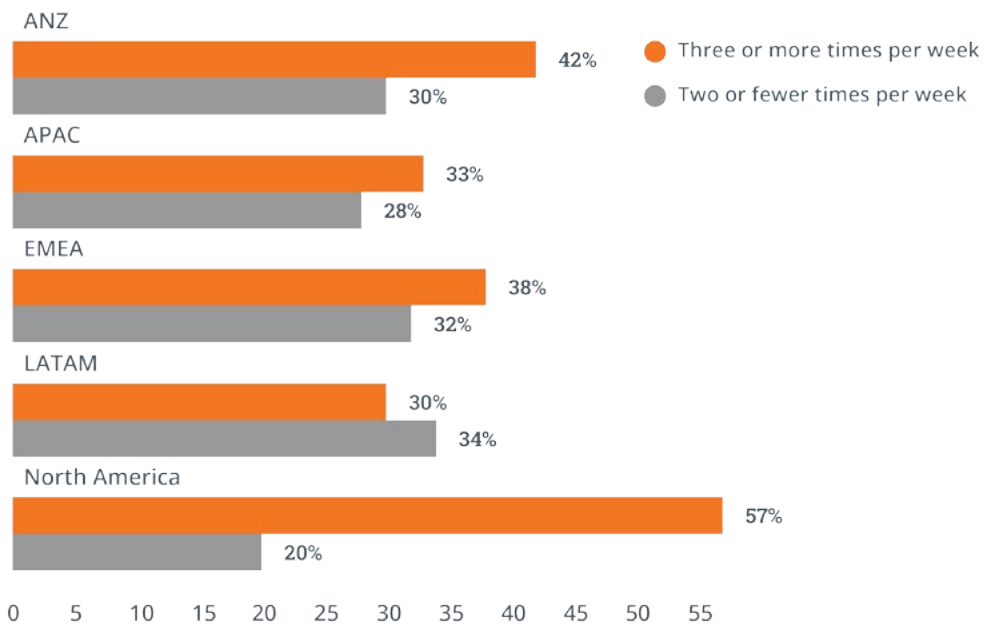
All players in the international marketing community share the desire to see a higher ROI year-over-year -- but not everyone tracks ROI in the first place. While half of North American respondents saw a higher ROI in 2015, more than half of survey takers in Latin America didn't know their ROI to begin with. As mentioned earlier, tracking your ROI is the first step in proving positive ROI, which in turn unlocks budget.

In addition, North America was the only region where more than half of respondents indicated they check their marketing metrics three or more times per week. International regions have catching up to do in terms of tracking metrics and ROI.



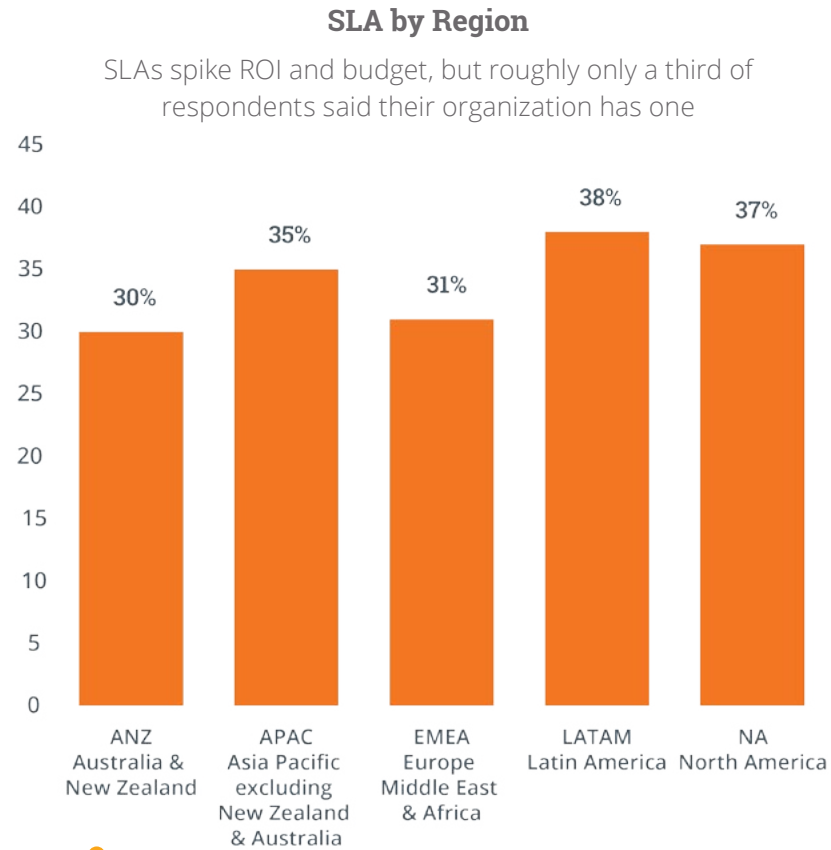
Frequency at Which Marketers Check Metrics by Region

More than 50% of North America checks 3x+ per week; other regions trail behind



Everyone has catching up to do when it comes to SLAs

Our survey showed that a formal SLA between sales and marketing departments leads to increased budget and increased ROI. However, only between 30% and 40% of respondents in each region we polled indicated their organization has one. Opportunities abound for increased departmental alignment between international sales and marketing teams.



Survey Methodology

HubSpot fielded our 2015 State of Inbound survey between Wednesday, June 3, 2015 and Monday, July 6, 2015. The survey was administered online, where 3,957 respondents completed it. To see an exact demographic breakdown of the completed survey respondents, please reference the “Who We Talked To” section of the report.

The sampling method was a voluntary sample, with the audience solicited through promotional channels including Facebook, Twitter, LinkedIn, paid, and email campaigns. It doesn’t end there. For a closer look at a host of sales-specific topics, please be sure to download our State of Inbound Sales report.

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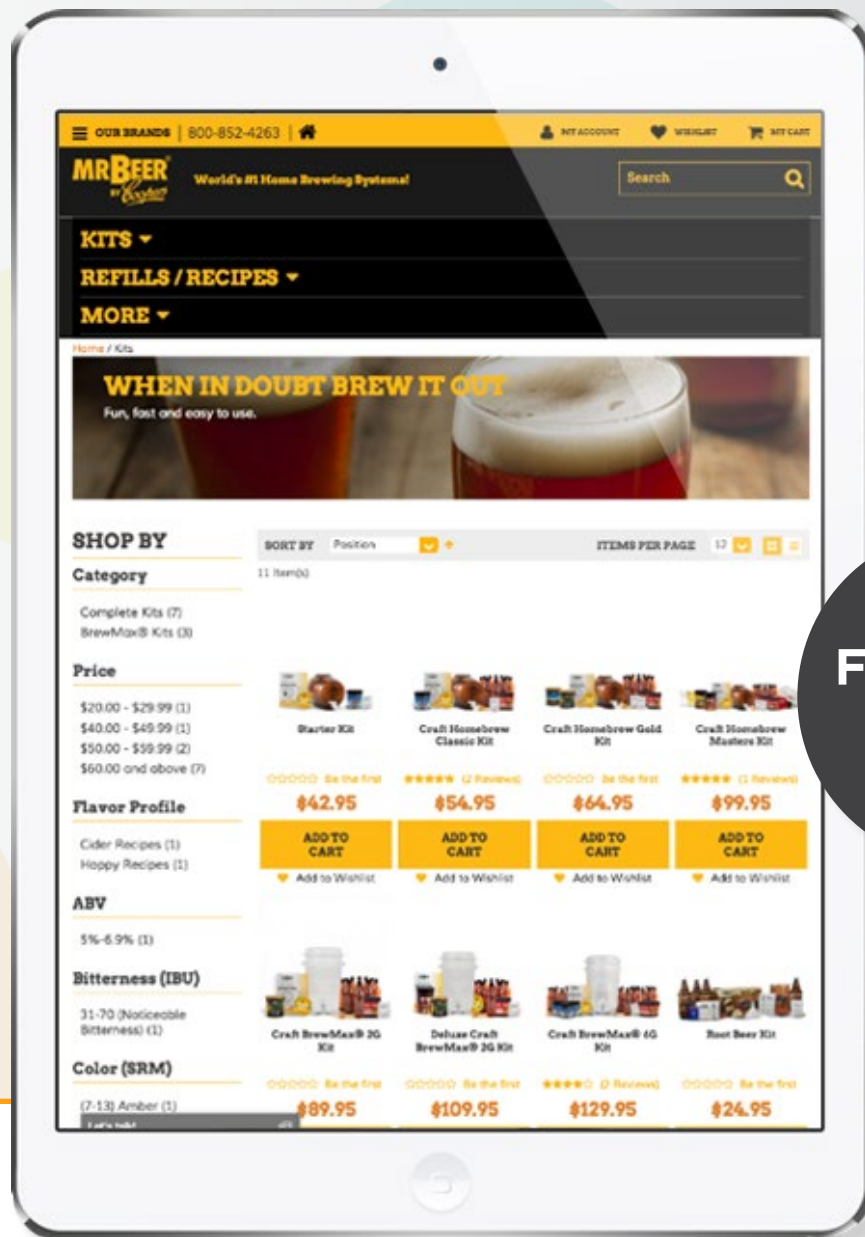
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