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IDC

The HubSpot Ecosystem: More than $26 Billion in New Opportunity Ahead

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Navigating this White Paper

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IN THIS WHITE PAPER

This white paper sizes the ecosystem of products and services that accompanies cloud software sold by HubSpot, a United States–based customer relationship management (CRM) platform provider. These add-on products and services include additional software, IT services, business services, and infrastructure, as well as specialized services and software that support marketing, sales, and customer service departments utilizing HubSpot cloud subscriptions.

The sizing includes a forecast to 2025 that relies on IDC forecasts of various IT and cloud market segments, as well as the results of a global survey of 205 companies conducted in late 2020.

Executive Summary

When IDC authored the first version of this report in 2021, we expected HubSpot to reach a billion dollars in revenue by the end of the year. However, HubSpot's 2021 revenue exceeded $1.27 billion. As a result, we have updated our models and our report for 2022. While many of the assumptions about software trends and market drivers remain valid, HubSpot's accelerated growth has significant upside for its growing community of software and solutions partners.

Channel growth is strong, driven in part by a large increase in co-selling. 2021 saw over a 250% increase in partners co-selling with HubSpot's direct sales team. On an individual partner basis, there have been strong increases in partner productivity and average sales price. The number of partner apps on the HubSpot site exploded from 2020 to 2021 by nearly 70% as customers are leveraging more of the suite and tackling more complex use cases. This equates to ecosystem opportunity as those complex use cases need ecosystem support.

In addition, IDC expects the HubSpot revenue base to migrate outward from marketing solutions (about 55% in 2021 to 46% in 2025) and from North America (54% in 2021 to 42% in 2025).

As a result, the revenue opportunity for HubSpot's ecosystem is forecast to grow from $7.4 billion in 2021 to 17.9 billion in 2025.

- The ecosystem that supports HubSpot customers with add-on products and services is more than five times bigger than HubSpot today and is expected to be six and a half times bigger by 2025.
- The challenge for HubSpot will be to keep up with growth and manage an ever more diverse and complex customer and partner base.

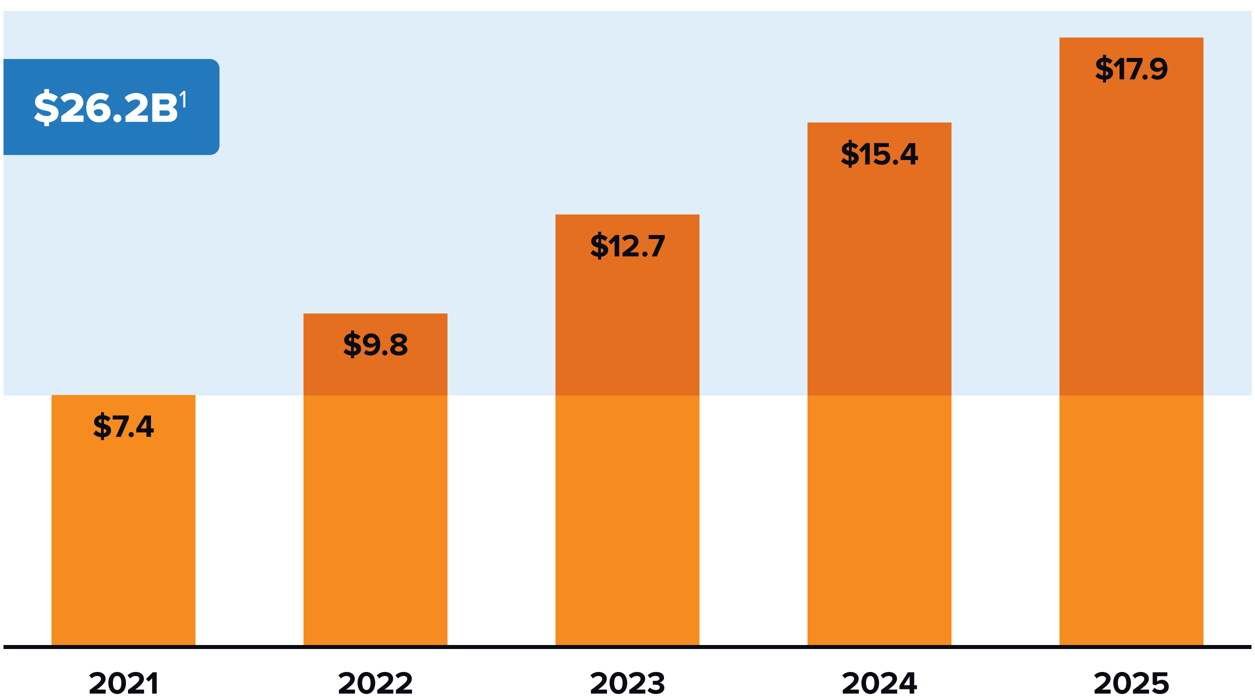
The rise of HubSpot—from a half-billion dollars in revenue in 2018 to $1.27 billion dollars in 2021—is intimately linked to the rise of cloud computing. Ten years ago, cloud computing was less than 2% of IT spending worldwide. In 2021, it was 14%. In 2025, we expect it to be 22%.

Even more pronounced is the penetration of cloud into the software market. Excluding infrastructure as a service, which is basically shared hardware, cloud software will go from less than a third of all software sold in 2019 to 70% in 2025.

Put it all together and IDC predicts that over the next four years, the revenue generated by HubSpot's ecosystem will grow 2.6 times to $17.9 billion, which represents more than $26 billion[1] of available market, as shown in **Figure 1**.

FIGURE 1

HubSpot Ecosystem's Total Available Market Worldwide, 2022–2025
($B)



Source: IDC, 2022

[1] This is the difference from each year's revenue above 2021 revenue and then summed.

The HubSpot Environment

As HubSpot continues its growth beyond the billion-dollar revenue threshold, it finds itself expanding outward in multiple ways. In 2020, for instance, IDC believed that 55% of HubSpot revenue was focused on marketing-oriented solutions. And, while we forecast those to grow, we expect them to fall to under half of revenue by 2025, with sales and customer support solutions, via HubSpot's Sales Hub and Service Hub, contributing a greater portion of revenue as a result of higher growth rates as these Hubs are earlier in their adoption cycles. In addition, HubSpot's product family will continue to grow. The company released its Operations Hub and Payments solution in 2021 and IDC expects other products may come to market during the forecast period; however, none of these are included in our quantitative assessment.

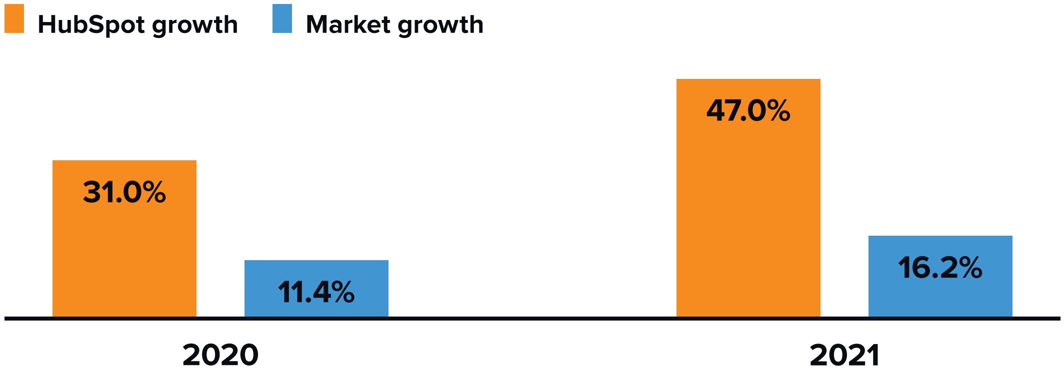
IDC also expects HubSpot customers to become increasingly international, with North American revenue going from 52% in 2021 to approximately 40% by 2025. IDC also expects to see HubSpot's market presence continue to expand into upper midsize companies. HubSpot's software capabilities and back-end scalability have been improving for several years to support more complex teams and go-to-market models in larger organizations.

Meanwhile, the marketing, sales, and customer support areas in which HubSpot and its ecosystem concentrate are in a fervor of change. IDC's Digital Transformation Spending Guide lists 184 discrete cloud-related use cases, a quarter of which involve marketing, sales, or customer support. That 25% will drive a third of documented use case spending from now to 2025 and will grow at more than 20% a year.

The vibrancy of these particular use case areas helps explain HubSpot's growth within the cloud marketing, sales, and customer service categories. To date, HubSpot has grown at nearly triple the rate of its target market[2] segments, as shown in **Figure 2**.

FIGURE 2

HubSpot's Growth Relative to the Market, 2020 and 2021



Source: IDC, 2021

[2] The target market segment data comes from representative cloud software applications including: Digital Advertising, Contact Center, Customer Service, Digital Commerce, Enterprise Content Management, Marketing Campaign Management, Persuasive Content Management, Sales Force Productivity and Management.

The Effervescent Customer-Facing Markets

There are many forces driving demand for digital transformation related to customer-facing functions in every business.

Chief among them is the pandemic-accelerated digitization of brand-buyer relationships from digital ready to digital first to digital only. All three modes will continue, but the mix has shifted to the latter. IDC expects many businesses will find their customers normalized around the convenience and safety of contactless commerce, which requires strong capabilities across all facets of the digital buyer's journey from awareness through consideration, purchase, success, advocacy, and repeat/renew cycles.

Contactless commerce, in turn, demands expansive digital engagement capabilities, automation and, most critically, integration among marketing, sales, and service. Sellers must engage digitally, but to provide a holistic experience, they must deploy technology in a coordinated way across multiple customer-facing functions. The key to doing so is to implement common infrastructure and standards for operations, governance, data definitions, and technical integration.

Over the past decade, the only way to build a complete infrastructure technology was based on "best of breed" departmental systems. But this approach leads to "fragmentation by design" and lacks customer centricity because the systems are not specified based on managing customer experiences across them.

As a result, most large enterprises are evaluating cloud/Saas products built on integrated suites supported by shared databases, analytics, reporting, and customer view. Small and medium-sized enterprises should also consider the value of implementing systems from a single platform or vendor built on a common back end for customer data management, process orchestration, and customer engagement, to deliver a continuous customer experience across departmental touchpoints. In order to improve organizational efficiency and time to value, they should consider systems that are both easy to implement and adopt.

Underlying shared services are essential to enabling every customer interaction to enhance every other interaction in near real-time:

- **Marketers** can use sales or service data to better target, personalize or suppress marketing outreach and increase customer trust and relevancy
- **Sales** can follow up at the right time and in context with a shared view of prior customer engagement, automated lead routing and tailored communications
- **Service teams** can support customer retention, but also use sales information to effect upsell opportunities or ensure service data can be used as criteria to suppress marketing outreach

Fundamentally, if the underlying infrastructure isn't customer centric, nothing will be.

As a result, companies cannot continue to implement departmental solutions independently. These systems need to be funded, deployed, and operated as an end-to-end infrastructure regardless of whether they are bought at the same time or as steps on a road map.

Most importantly, the data layer of the infrastructure needs to be a service that is available across the front office. Specifically, the CRM should not be defined as a departmental system but as an enterprise resource that complies with data standards and integrates through open APIs. At the application layer, each department will need multiple systems as the company grows, adding greater capabilities and complexities. This opens big opportunities for HubSpot partners to develop and deliver a wide range of software and the related implementation, integration, and operation services in buying centers beyond marketing.

However, technology is only the foundation. A host of technical skills and operational best practices are needed to realize the full potential of the digital infrastructure.

Almost all businesses, especially small and midsize companies, will need to leverage outside services to meet the demands of competing on digital platforms. Service opportunities for HubSpot partners include all activities across these departments, from running Facebook ad campaigns to producing content; from scoring leads based on click streams to optimizing sales enablement; from developing customer support knowledge bases to implementing self-service resources; from building web apps to migrating websites and implementing CRMs; and many more.

Additionally, as customers handle more complex use cases, HubSpot partners are instrumental in supporting customers implementing multiple products within the HubSpot CRM platform. From 2020 to 2021, the number of customers who purchased more than one of the five core HubSpot products from solutions partners increased by 50%, suggesting customers are seeking out the services of HubSpot partners to help leverage more of the HubSpot CRM platform.

The next section describes the top near-term needs of HubSpot customers; a full list is included in the Appendix section.

The HubSpot Ecosystem

As mentioned previously, to support the marketing, sales, and support functions that drive adoption of the HubSpot CRM platform, customers need a constellation of other products and services. For instance, of respondents asked about 16 discrete marketing software needs — from account-based marketing to video production — over the next 12 months, only 4% of respondents said, "None of the above." On the contrary, on average respondents said that they needed more than five additional types of software to support marketing, sales, and customer support. Similarly, when asked about 19 additional marketing services, only 4.5% said none of the above. **Tables 1–3** show the top 5 service needs for marketing, sales, and service/support functions. Together, they represent a growth roadmap for partners to expand their skills and account relationships.

TABLE 1

Top 5 Additional Marketing Services HubSpot Customers Need in Next 12 Months

	HubSpot Customers
Search engine optimization	38.9%
Social marketing	35.4%
Email marketing	34.3%
Video production	34.3%
Content/creative production	31.3%

n = 161, Source: IDC's *HubSpot Customer Survey*, 2020

TABLE 2

Top 5 Additional Sales Services HubSpot Customers Need in the Next 12 Months

	HubSpot Customers
Sales and marketing alignment	43.9%
Sales methodology	32.3%
Training on virtual/video sales skills	29.6%
CRM implementation	28.6%
Sales enablement content	27.5%

n = 189, Source: *IDC's HubSpot Customer Survey*, 2020

TABLE 3

Top 5 Additional Support Services HubSpot Customers Need in the Next 12 Months

	HubSpot Customers
Customer survey and analysis	45.6%
Knowledge base development	40.4%
Customer success training	37.4%
Customer support training	35.1%
Help desk implementation	27.5%

n = 204, Source: IDC's *HubSpot Customer Survey*, 2020

Fulfilling the needs listed previously in Tables 1–3 as well as hundreds of other potential services is the role of the HubSpot ecosystem, and many, but not all, official HubSpot partners.

For expediency's sake, IDC has grouped hundreds of add-on revenue opportunities into four buckets:

- **Add-on software**[3]
- **IT and professional services**[4]
- **Add-on infrastructure**[5]
- **Commissions/ gross margin on resales**

In fact, customer spending on these add-on products and services is much larger than spending on HubSpot cloud software. **Figure 3** (next page) shows IDC's forecast size of the HubSpot ecosystem in terms of its ratio of revenue to HubSpot revenue.

In 2021, that ratio was 5.7:1. By 2025, it will be 6.5:1.

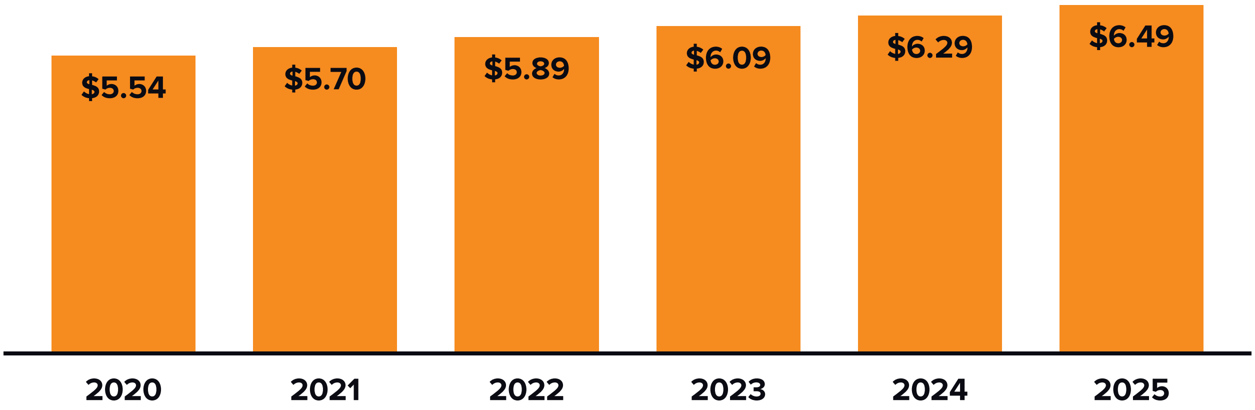
[3] These software categories include system infrastructure, security, application development, general administrative and finance, data management, and analytic applications, along with multiple software types specific to the functions of marketing, sales, and customer support.

[4] These services categories include IT outsourcing, systems integration, custom application development, end-user and IT training, and network and device management, along with services specific to the functions of marketing, sales, and customer support.

[5] This is primarily network line charges but also includes some on-premises client devices/upgrades to support implementations and infrastructure to support add-on cloud services.

FIGURE 3

The Footprint of the HubSpot Ecosystem, 2020–2025 Ecosystem Revenue per $1 of HubSpot Revenue



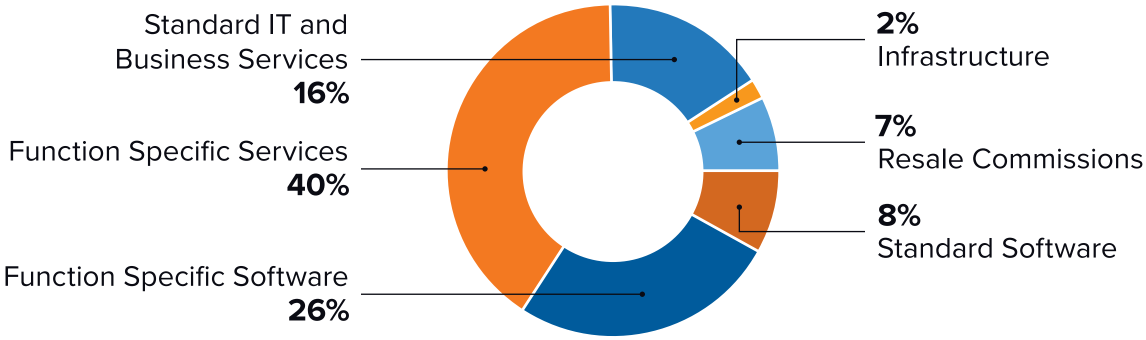
Source: IDC, 2022

Thus, the ecosystem is not just bigger than HubSpot, it's also growing faster. This is the result of automation needs expanding over time, the need to interconnect and integrate multiple software applications and service efforts, and HubSpot's active recruitment of partners as the company expands into new geographies, functional areas, and enterprise-size classes.

Figure 4 shows the category breakdown. Most of the software and services revenues will come from products specialized to support marketing, sales, and customer support functions.

FIGURE 4

HubSpot Ecosystem's Category Breakdown, 2021–2025



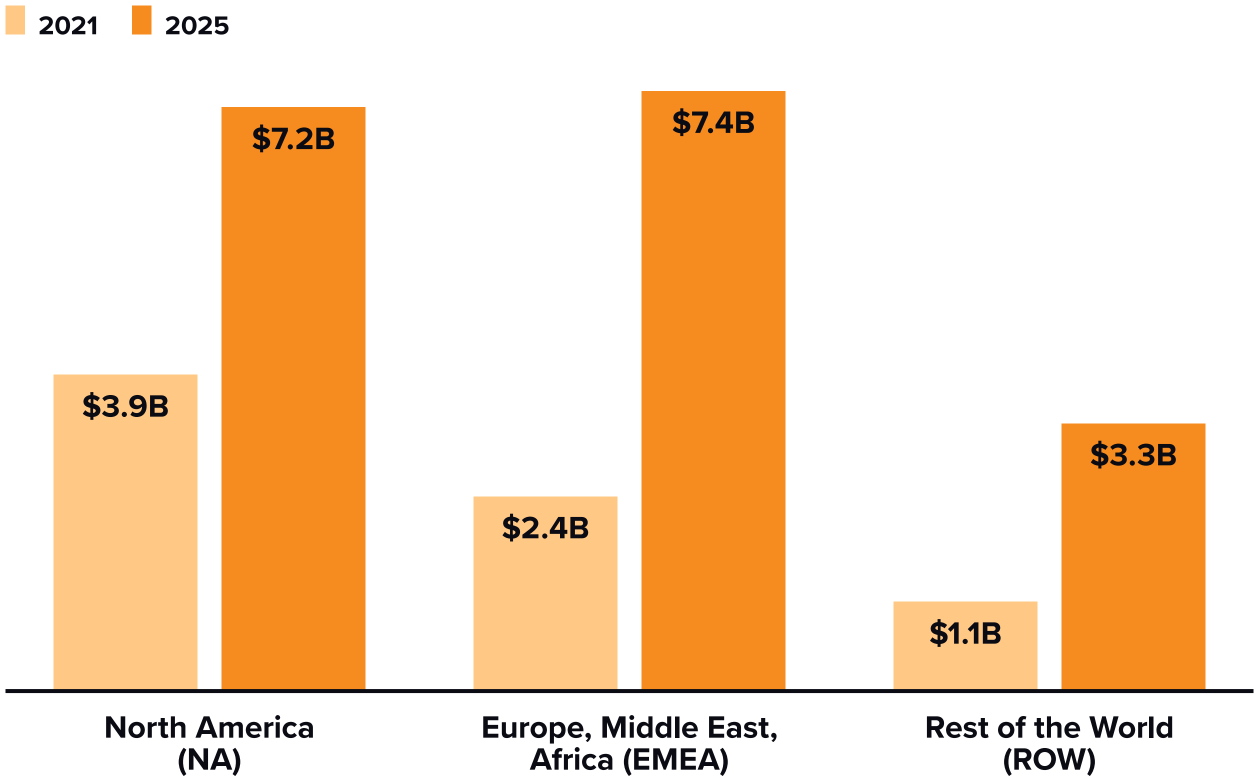
Source: IDC, 2022

The geographic changes expected by IDC will be fairly pronounced, with the EMEA-based ecosystem growing faster than the North American ecosystem and the ecosystem serving the rest of the world growing faster than the EMEA ecosystem.

Figure 5 shows the regional comparison.

FIGURE 5

HubSpot Ecosystem's Geographic Expansion, 2021 and 2025
Revenue by Region ($B)



Source: IDC, 2022

IDC also expects that the ratio of ecosystem revenue to HubSpot revenue will be slightly higher in EMEA than North America and slightly higher in the rest of the world than EMEA. The assumption here is that it will be easier for HubSpot to work through partners than establish local operations in far-flung geographies.

Challenges

If HubSpot's expansion and that of its ecosystem are to continue, the company will have to deal with some clear challenges:

- Growth will have to be managed. It will require new processes, staff, practices, and layers of management to support not only HubSpot's growth but also the ability to support the growth of its partner community and the needs of newer, larger partners.
- Geographic expansion will require new localization tools, new local presence, an expanding management hierarchy, and continuing support of partners.
- As HubSpot's offerings expand and grow from marketing to sales, customer service, operations, and payments, customers will be looking for integration tools and services, while partners will be looking for tools to support cross-selling.
- As with many high-tech companies growing fast, skilled staff may be difficult to find. And skills will constantly change as digital transformation turns customers more data dependent.

HubSpot has already passed some impressive hurdles, expanding its product line, selling in nearly 120 countries, and remaining profitable while investing in growth. And HubSpot's core market outlook is good, which bodes well for the company.

Conclusion and Outlook

The influence of digitalization on buyer behavior and the overall economy requires businesses to be as agile, responsive, and empathetic as they can be. Cataclysmic changes can take place at any time on any scale globally or locally, presenting unpredictable challenges that require new approaches and solutions.

If the COVID-19 pandemic has taught businesses anything, it is that adaptability is the greatest competitive advantage of all. Companies that can reinvent their people, processes, and technology the fastest and most efficiently will win because of their ability to not only adapt to new market conditions but also create them. Cataclysmic events at the global and local levels will continue as competition intensifies.

As they say, the best way to predict the future is to invent it. But to do so requires a technology infrastructure that is simplified, streamlined, connected, and flexible. Buyers want responsive, empathetic engagement to be coordinated across all their interactions. Businesses can no longer get away with optimizing each function based on disconnected departmental use cases, data, and customer insights. If the components of the enterprise are to act as one across the customer journey, the infrastructure must enable data to drive innovation everywhere. One of the great advantages for HubSpot and its partners is that its core technology is built on shared data, analytics, and automation capabilities — its product family is not the result of a myriad acquisitions and slowly maturing integrations.

The trend to ever more digital, ever more integrated, is a major growth driver for HubSpot and its partner ecosystem. The work of the next decade for HubSpot and its partners will be to provide the software and services customers need to grow and compete on customer experience. Across marketing, sales, and service that comprises a broad set of opportunities for partners to expand the offerings they deliver on the HubSpot solutions, as well as related software and services. To capitalize on this and outperform their peers, HubSpot partners will have to create road maps for growth, invest in their skills, expand go-to-market activities, and sustain high levels of customer support capabilities.

Appendix

Data Tables

The regional growth of the HubSpot ecosystem is provided in **Table 4.** A list of additional service and support opportunities for HubSpot partners are presented in **Table 5.**

TABLE 4

HubSpot Ecosystem's Regional Growth, 2020–2025

	2020	2021	2022	2023	2024	2025	Total Available Market*	Four-year CAGR	% of Total TAM
Worldwide									
Ecosystem revenue ($M)									
Add-on Generic Software	$363	$557	$746	$971	$1,189	$1,410	$2,088	26%	8%
Add-on Function-Specific Software	$1,391	$2,091	$2,756	$3,522	$4,244	$4,934	$7,094	24%	27%
Function-Specific Services	$1,796	$2,752	$3,680	$4,785	$5,868	$6,941	$10,268	26%	39%
Standard IT and Business Services	$840	$1,247	$1,641	$2,092	$2,504	$2,867	$4,117	23%	16%
Infrastructure	$159	$227	$301	$365	$406	$433	$597	18%	2.3%
Resale Commissions	$341	$524	$706	$924	$1,141	$1,346	$2,022	27%	8%
	$4,891	$7,396	$9,830	$12,660	$15,351	$17,931	$26,185	25%	100%
Ecosystem ratio to HubSpot revenues	5.54	5.70	5.89	6.09	6.29	6.49			
North America									
Ecosystem revenue ($M)									
Add-on Generic Software	$226	$328	$413	$502	$572	$660	$836	19%	10%
Add-on Function-Specific Software	$804	$1,135	$1,389	$1,630	$1,792	$2,006	$2,279	15%	26%
Function-Specific Services	$1,053	$1,519	$1,898	$2,294	$2,605	$2,994	$3,717	18%	43%
Standard IT and Business Services	$414	$560	$679	$794	$869	$964	$1,065	15%	12%
Infrastructure	$73	$97	$129	$150	$156	$166	$214	14%	2%
Resale Commissions	$160	$226	$279	$334	$375	$427	$509	17%	6%
	$2,732	$3,864	$4,787	$5,705	$6,369	$7,217	$8,620	17%	100%
Ecosystem ratio to HubSpot revenues	5.3	5.5	5.6	5.8	6.0	6.2			
Europe, Middle East, Africa (EMEA)									
Ecosystem revenue ($M)									
Add-on generic software	$101	$169	$245	$342	$448	$544	$904	34%	7%
Add-on function-specific software	$415	$671	$953	$1,309	$1,681	$1,994	$3,252	31%	27%
Function-specific services	$539	$898	$1,301	$1,819	$2,380	$2,884	$4,792	34%	39%
Standard IT and business services	$295	$470	$656	$882	$1,112	$1,296	$2,066	29%	17%
Infrastructure	$30	$46	$61	$77	$90	$97	$140	20%	1%
Resale commissions	$119	$195	$279	$386	$499	$599	$983	32%	8%
	$1,500	$2,449	$3,494	$4,815	$6,211	$7,414	$12,137	32%	100%
Ecosystem ratio to HubSpot revenues	5.7	5.9	6.1	6.3	6.5				

	2020	2021	2022	2023	2024	2025	Total Available Market*	Four-year CAGR	% of Total TAM
Rest of the World (ROW)									
Ecosystem revenue ($M)									
Add-on generic software	$36	$60	$89	$126	$168	$206	$348	47%	6%
Add-on function-specific software	$172	$285	$414	$583	$771	$934	$1,563	46%	29%
Function-specific services	$204	$335	$481	$672	$883	$1,063	$1,759	44%	32%
Standard IT and business services	$131	$217	$307	$416	$523	$607	$986	41%	18%
Infrastructure	$55	$84	$111	$138	$160	$170	$243	30%	4%
Resale commissions	$62	$102	$147	$205	$267	$320	$529	44%	10%
	$659	$1,083	$1,548	$2,140	$2,772	$3,300	$5,429	43%	100%
Ecosystem ratio to HubSpot revenues	6.13	6.24	6.36	6.49	6.62	6.77			

Note: totals may not sum to 100% due to rounding.
Source: IDC, 2021

TABLE 5

A Gamut of Additional Service and Support Opportunities for HubSpot Partners

Services Need in the Next 12 Months		
Marketing Services	**Sales Services**	**Customer Support Services**
• Advertising/media buying • Branding • Campaign execution • Campaign planning • Community management • Content/creative production • Content/inbound marketing • Conversational marketing • Design • Email marketing • Email templates • Event planning/management • Mobile/app marketing • Public relations • Search engine optimization • Social marketing • Social media home pages • Video production • Website rebuild/website migration	• CRM implementation • CRM migration • Sales and marketing alignment • Sales enablement content • Sales methodology • Telesales • Training on virtual/video sales skills	• Customer success training • Customer support training • Customer survey and analysis • Help desk implementation • Knowledge base development
Other Services		
• Data management • Contact lists/data enrichment • Custom API integrations • System implementation and integration • System configuration and administration • Network and data security • Privacy and compliance • System operations		

Source: IDC, 2022

Methodology

For nearly two decades, IDC has been sizing the ecosystems for software vendors utilizing IDC market studies, forecasts, and surveys that illuminate the links between software and the services and products that must accompany software for implementations to be complete. At times, but not in this case, we have looked at internal costs as well.

Add-on Categories

The model behind the data presented in this White Paper on the HubSpot ecosystem uses IDC's market research to develop ratios of spending on various categories of products and services to spending on HubSpot cloud subscriptions. These add-on categories include:

- **Add-on software:**
  - Add-on cloud subscriptions
  - Add-on on-premises software
  - Function-specialized software
- **IT and professional services:**
  - Function-specialized services
  - Standard IT services
  - Standard business services
- **Add-on infrastructure and networking**
- **Commissions/gross margin on resales**

Each category of additional products or services was applied to forecasts of HubSpot revenue for marketing, sales, and customer support subscriptions.

HubSpot Revenue

Developing a forecast of ecosystem revenue using this model requires a forecast of HubSpot revenue. While IDC does not publish vendor revenue forecasts, they are often used in projects like this one.

In this White Paper, IDC started with publicly available financial data through 2020, internal IDC Software Tracker data, and Wall Street forecasts for 2021. Beyond that, IDC grew the HubSpot forecast at the rate of growth of marketing cloud, sales cloud, and service cloud software based on the latest IDC forecasts. For 2022, IDC averaged the market growth rates with HubSpot's 2020 over 2019 growth rate.

Key Modeling Assumptions

HubSpot revenue is the denominator of each ratio of product/service to revenue that drives the sizing of ecosystem categories listed previously. In general, these ratios come from ratios taken from IDC market studies (e.g., the ratio of infrastructure costs to software spending, services revenue to software revenue). IDC also uses its channel research to estimate the amount of software, services, and infrastructure that might be resold.

Within the model, there are then analyst assumptions — ideally, but not always, driven by survey research— that may adjust these ratios.

The specific ratios are IDC work product, but there are some meta-assumptions here:

- IDC has assumed that while HubSpot is still rolling out Sales Hub, Service Hub, and CMS Hub, some portion of Marketing Hub customers will fill the need with partner sales and support services. Over time, HubSpot will displace some of these add-on services. IDC expects that customers of Sales Hub or Service Hub will rarely augment them with Marketing Hub substitutes.
- Geographic expansion will drive up the resale percentage of HubSpot revenue. This is the case in the IDC forecast of direct versus indirect spending on software by region.
- HubSpot's professional services offerings, a small percentage of revenue, will stay as a flat percentage of revenue and not effectively displace partner services.
- The ratios of products and services that are based on total market ratios have been adjusted for the fact that most of HubSpot customers are in the size classes of fewer than 2,000 employees.

The Customer Survey

To support the modeling effort and gain direct insight into customer needs associated with HubSpot installations, IDC conducted an online survey in November 2020 of 205 organizations in 20 different countries — but with 57% from North America and 37% from Western Europe.

Some other survey demographics are:

- 80% of respondents were from small companies (fewer than 100 employees).
- A third of respondents were in sales, 40% in marketing, and the rest in other functions.
- A third of respondents worked for technology companies and the rest of the respondents were well distributed across 30+ other industries.

Questions ranged from spending and revenue estimates to the use of HubSpot partners, future categories of software and services required, and ratings of needs.

About the Analysts

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Gerry Murray is a Research Director with IDC's Marketing and Sales Technology service where he covers marketing technology and related solutions. He produces competitive assessments, market forecasts, innovator reports, maturity models, case studies, and thought leadership research.

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More about Alan Webber

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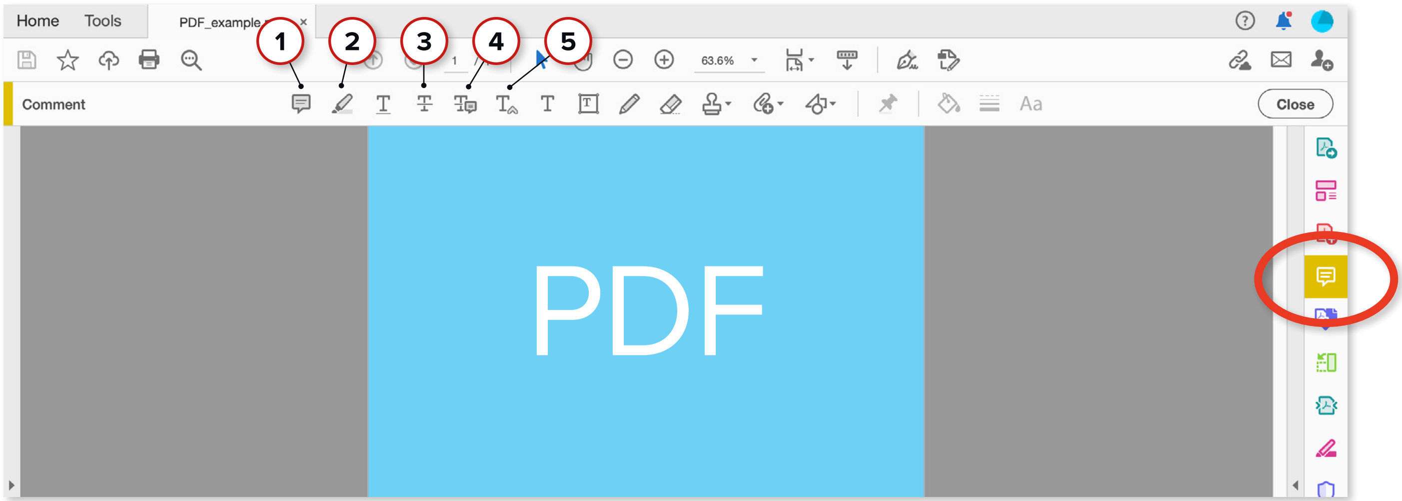

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