

AI Everywhere Drives a \$30 Billion Opportunity Across the Global HubSpot Ecosystem



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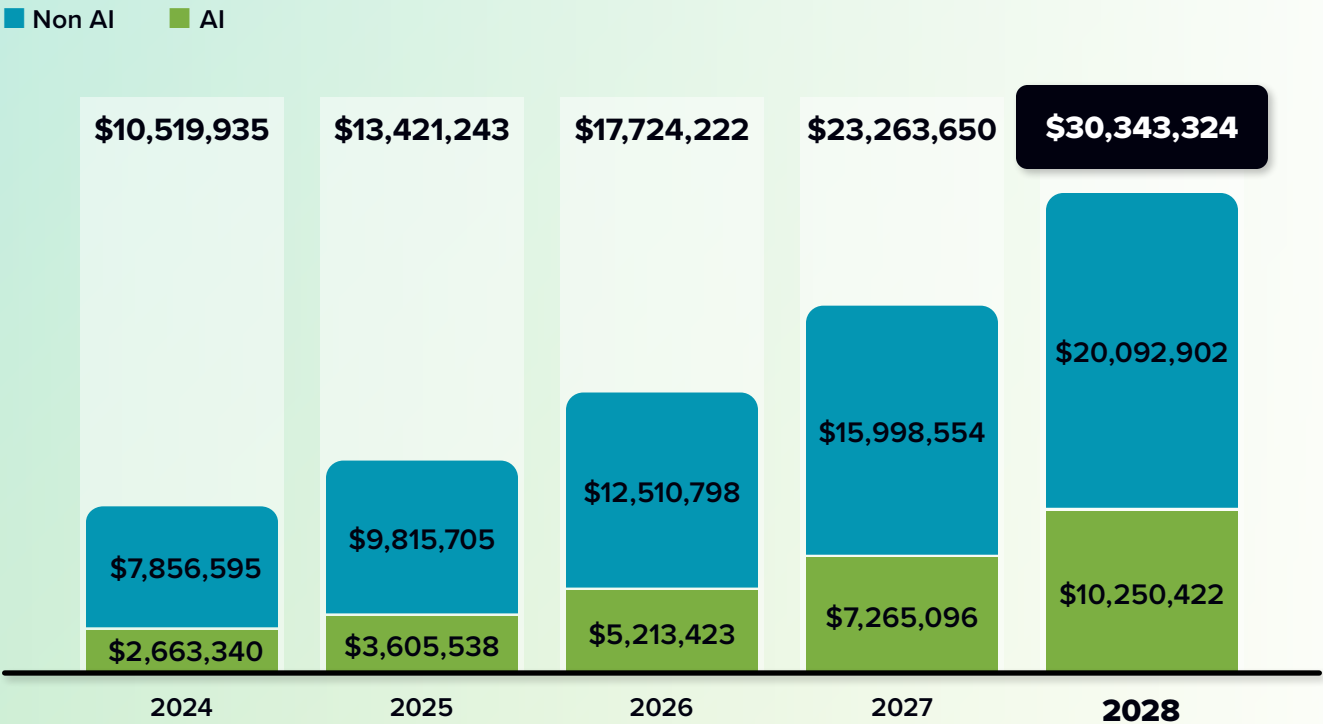
Introduction

AI is reshaping the CX landscape, transforming how businesses interact with customers. As automation takes over routine tasks and applications adopt self-service agentic capabilities, the role of CX departments will shift toward delivering higher-value, strategic solutions. This presents significant opportunities for HubSpot partners to provide innovative services. For small and medium-sized businesses (SMBs), it signals the end of basic, standalone tools and self-managed CRM systems, driving demand for more advanced, integrated solutions.

Supporting this tectonic technology shift, the CX ecosystem will see growth and fundamental structural change. Traditional, rigid definitions will give way to flexible, customer-centric approaches as applications and services converge. System integrators are adopting AI execution tools and enhancing their offerings with custom application development. Meanwhile, application providers are evolving, providing technical integration and value-added services that maximize the impact of their solutions within specific industries and segments. As HubSpot expands its capabilities, solution partners are investing in new skills and service offerings, creating a virtuous cycle in which mutual success fuels innovation and market growth.

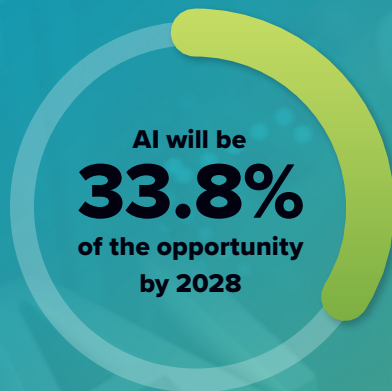
In this landscape, organizations will prioritize AI-enabled partners (whether application-oriented or services-based) that can address their entire customer life cycle, including sales, service, and marketing, to deliver seamless front-office experiences. HubSpot solutions and application partners who adapt to the changing demands and fully capitalize on HubSpot’s market tailwinds stand to participate in a \$30 billion global market opportunity by 2028, as shown in **Figure 1**.

FIGURE 1
HubSpot Ecosystem (Apps and Services) Opportunity AI and Non-AI Components
(\$US Millions)



Source: IDC 2025
For an accessible version of the data in this figure, see [Figure 1 Supplemental Data](#) in the Appendix.

IDC conservatively modeled a 27.6% growth in the HubSpot ecosystem opportunity for solution/app partners (from ~\$10.5 billion in 2024 to ~\$13.4 billion in 2025). Interestingly, a survey of HubSpot solutions and application partners shows even greater optimism (n = 139; IDC's *HubSpot Partner Survey*, November 2024). Surveyed partners' opinions suggested their median revenues would increase by 43.8% during the same period. Additionally, surveyed solution and application partners indicated that they believe the revenue derived specifically from HubSpot-related work would rise from 57% of their total revenue in 2023 to 64% by 2025. These optimistic partner opinions about their growth potential lend credence to IDC's estimates.



Exploring the \$30 billion opportunity, AI will be a significant driver across the entire HubSpot ecosystem, responsible for 33.8% or ~\$10.2 billion of the opportunity by 2028.

AI's impact extends beyond dedicated services such as RAG optimization or LLM selection within the HubSpot ecosystem. It is transforming business services by accelerating change management and process innovation, enhancing IT services through cloud migration and data infrastructure upgrades, and advancing application development with AI-enabled automation and full agent design. This aligns with broader industry trends where IDC estimates global AI investments will reach \$632 billion by 2028, with \$202 billion dedicated to generative AI (GenAI), underscoring the growing importance of AI-driven innovation (IDC's *Worldwide AI and Generative AI Spending Guide*, V2 2025, August 2024). As AI continues to see integration across these facets, it will reshape strategies and drive investments throughout the broader business sector and within the HubSpot ecosystem.

The Rise of Agentic Solutions: Where Applications and Services Converge



Agentic Solutions:

AI-powered automation that can perform tasks independently, adapt to new conditions, and make decisions without constant human input

HubSpot's partners will see growth in the AI era owing to the rise of agentic solutions — AI-powered tools that autonomously perform myriad tasks for employees across the front office and IT. This shift blurs the lines between applications and services, creating new opportunities for innovation and value creation, as agents can undergo delivery in a managed service or licensed app model.

This duality — developing private, tailored solutions and public, scalable tools — will create convergence across the HubSpot ecosystem as partners of all types drive growth in the new AI everywhere era. For this reason, throughout this report, IDC refers only to the “ecosystem” and specifically does not differentiate between traditional categories of service providers versus application developers.

Solutions partners can now develop customer-specific AI agents that leverage HubSpot's data to automate tasks, personalize experiences, and deliver unique value. This approach shifts the focus from traditional service delivery to providing agents as a service in addition to ongoing training, management, and maintenance, redefining the role of service partners in the ecosystem.

Application partners can create and market public AI agents, listing them on marketplaces to address common business challenges by the thousands, if not millions. This expands the traditional application model, incorporating AI to offer scalable solutions and open new revenue streams.

A successful strategy requires access to high-quality data, effective use of that data, and specialized expertise in data science, ML, and AI engineering.

Agents operate on top of the customer's AI stack. To support these deployments, partners — whether developers or service providers — must offer essential services such as data cleansing, model optimization, RAG integrations, fine-tuning, and ongoing management. A successful strategy requires access to high-quality data, effective use of that data, and specialized expertise in data science, ML, and AI engineering. Moreover, tailoring solutions to specific customer needs will be crucial.

HubSpot's customer platform architecture provides a centralized data foundation, enabling effective AI agent training and deployment. Seamless integration across the platform enhances data flow and user experience, while collaboration within the ecosystem fosters innovation and unlocks new opportunities. As partners develop agentic solutions, they contribute to a “flywheel effect” that improves data quality, making AI models more accurate and effective. These AI-driven solutions, automating tasks and personalizing experiences, continually strengthen the ecosystem, enhancing HubSpot's value proposition. HubSpot partners can navigate this new era and thrive in an AI-driven market by embracing AI, focusing on customer value, and building strong partnerships.

A Perfect Partner Storm: HubSpot's Midmarket Expansion and AI Everywhere Revolution

The CX landscape is profoundly transforming due to AI and data analytics advancements. As businesses seek to deliver seamless, personalized interactions across all touch points, they must adopt a more holistic, multichannel approach to stay competitive. This shift presents immense opportunities for HubSpot solution partners to provide strategic solutions beyond traditional services.

With routine tasks such as data entry and campaign execution increasingly automated, demand for expertise in transformation strategy, data management, AI education, value measurement, system design, and risk mitigation is growing. HubSpot's ongoing innovation in products and partner programs positions it as a leader in this evolution.

HubSpot has expanded from a marketing automation tool to a comprehensive platform supporting sales, service, marketing, commerce, operations, and content management. Its CRM has evolved into a unified data repository, functioning as a mini data lake or customer data platform for many businesses. This unified approach makes HubSpot a natural foundation for AI-driven solutions and cross-departmental strategies, opening new avenues for partner engagement.

Midmarket organizations, often frustrated by the complexity of outdated systems, are increasingly turning to HubSpot for its rapid ROI, app integrations, and straightforward implementation. While HubSpot remains popular with

SMBs, its growing traction among businesses with up to 2,000 employees signals a broader upmarket momentum.

The demand for specialized, industry-specific applications is rising as client needs become more complex. This creates significant opportunities for partners to develop niche applications and, soon, agentic solutions — autonomous, task-specific systems that adapt and optimize processes. HubSpot's robust platform and ISV ecosystem empower partners to drive innovation and help clients maintain a competitive edge. By seizing these emerging opportunities, partners can play a vital role in extending the platform and shaping the future of CX strategies.

“

We're no longer just implementing tools; it's now about strategic, ongoing relationships to optimize deployments and infuse best practices.”






APAC solutions partner

To succeed in this rapidly evolving landscape, HubSpot solutions partners must expand their focus beyond sales and marketing to include service, commerce, and operations. Solutions partners can secure long-term, lucrative engagements in the dynamic AI-driven market by aligning data strategies with AI objectives, supporting cross-hub integrations, enabling larger deployments, and driving organizational change management.

AI Benefits and Challenges for CX

To fully capitalize on these opportunities, organizations must establish robust, centralized data infrastructures that serve as a single source of truth and enable real-time access to information. IDC estimates that new forms of GenAI and agentic AI operating on a unified infrastructure will significantly boost productivity across the front office. The transformative potential of GenAI in marketing alone will increase productivity from 5% to 60%, depending on the specific function. Marketing leaders can achieve substantial efficiency gains by delegating various tasks to GenAI. Below are IDC’s projections of how GenAI will impact five key marketing functions over the next five years. IDC expects similar productivity gains across all customer-facing functions, including sales, service, and commerce (Table 1, next page).

TABLE 1
GenAI-Based Increases in Marketing Productivity

Year	 Management and Planning	 Branding and Creative	 Campaign Execution and Engagement	 Analytics, Reporting, Optimization	 Other	Weighted Impact
2024	5%	15%	15%	15%	5%	12.1%
2025	5%	30%	30%	25%	5%	21.8%
2026	7%	35%	35%	30%	6%	25.7%
2027	10%	45%	45%	35%	6%	32.3%
2028	12%	55%	55%	40%	7%	38.9%
2029	14%	60%	60%	45%	8%	42.9%

*GenAI will increase marketing productivity by more than 40% in the next five years; Sam Altman says it could be closer to 95%" (#US51883524, March 2024)

To achieve these productivity gains, organizations must clean, standardize, and make accessible large volumes of structured and unstructured data while safeguarding intellectual property, managing copyright risks, and ensuring regulatory compliance. As a result, demand will grow for new services such as system integration, identity resolution, data management, workflow optimization, and tech stack analysis, presenting additional opportunities for solutions partners.

A recent HubSpot customer survey highlights these customer challenges, as shown in **Figure 2**, exploring the issues customers face in moving AI projects from pilot to production.

FIGURE 2
Primary Business Challenges In Moving AI Projects from Pilot to Product
(Percentage of respondents)



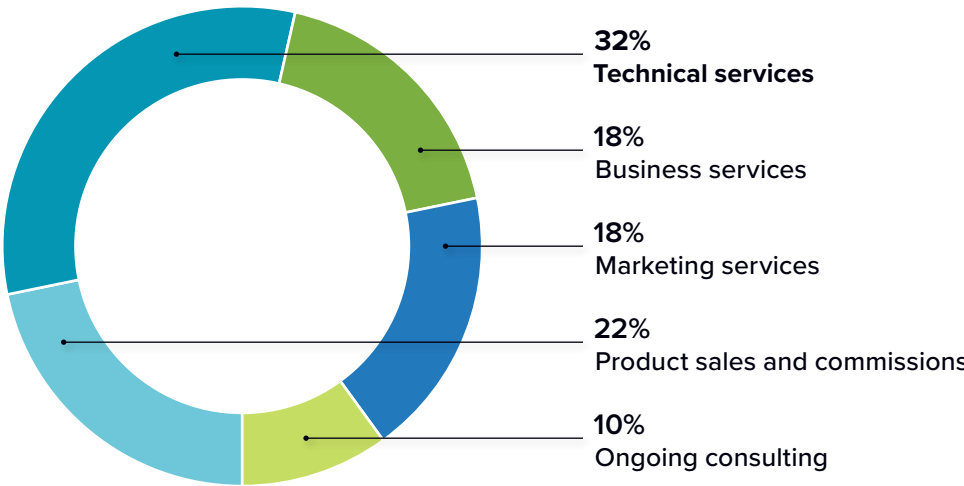
n = 139; Source: IDC's HubSpot Partner Survey, November 2024
For an accessible version of the data in this figure, see [Figure 2 Supplemental Data](#) in the Appendix.

These challenges present a lucrative opportunity for app and solutions partners to deliver transformative solutions that drive customer success in an AI-driven landscape. For smaller businesses typically priced out of large-scale consulting firms, HubSpot solutions partners will uniquely fill this gap by offering tailored, high-impact services to guide SMBs through this transition. However, tapping into this opportunity will require solutions partners to evolve. They must incorporate new roles and skills across multiple disciplines, including IT, management consulting, education, and change management, to effectively meet the changing needs of their customers.

Today, solutions partners are experiencing significant revenue growth from technical services, a foundational requirement for success in tomorrow’s AI-driven landscape. As shown in **Figure 3**, nearly one-third of solutions partner revenues now come from technical services, reflecting a marked shift from traditional offerings such as writing email copy or fixing blog issues.

FIGURE 3
Partner Revenue Breakdown (HubSpot Related)
(Percentage of respondents)

Nearly 1/3
of solutions partner
revenues now come
from technical
services, reflecting
a marked shift from
traditional offerings
such as writing
email copy or fixing
blog issues.



n = 139; Source: IDC’s *HubSpot Partner Survey*, November 2024

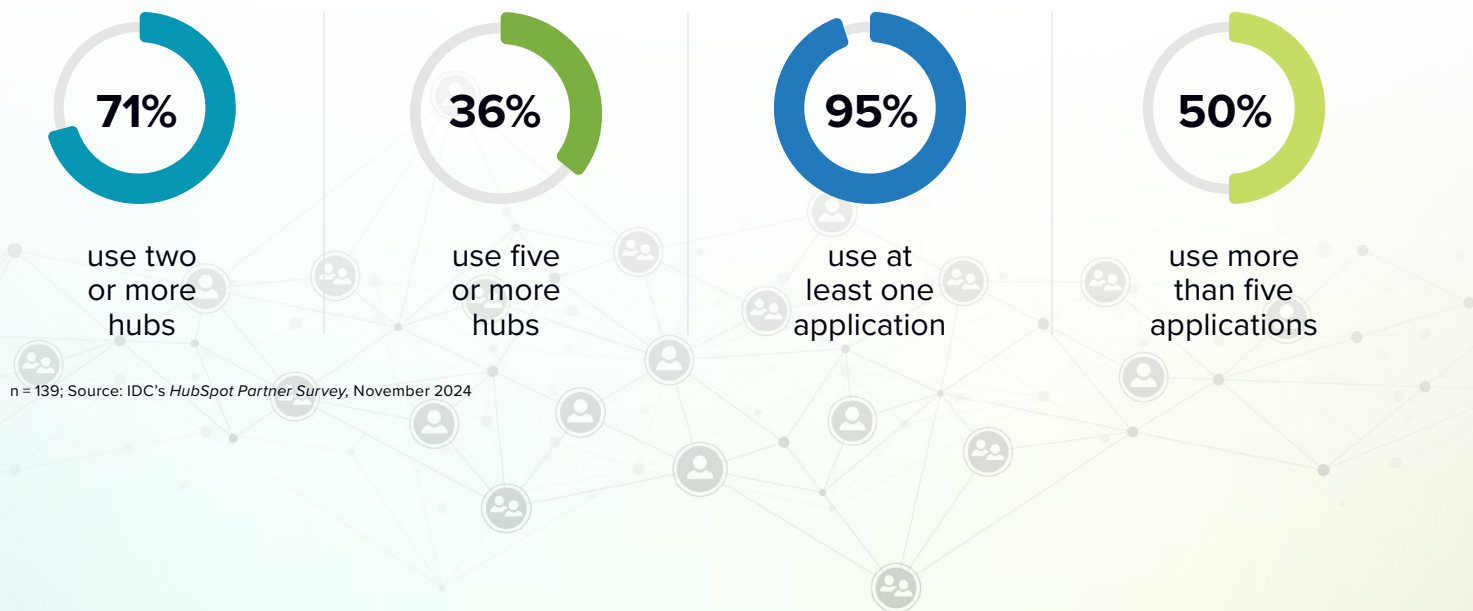
Solution partners are increasingly participating in complex integrations, custom application development, data migrations, and AI tool implementations. Partners, including traditional service providers and application developers, build automated workflows, integrate CRM systems with third-party applications, and configure AI-powered chatbots to enhance customer interactions. These technical services unlock new revenue streams and position partners as strategic allies in helping businesses fully leverage modern, AI-enabled platforms.

Multi-Departmental Growth

Over the past five years, HubSpot has transformed from a marketing automation tool into a comprehensive customer platform, expanding its capabilities to address diverse business needs. The platform includes interconnected engagement hubs — marketing, sales, service, content, commerce, and operations — each offering specialized tools that integrate into a unified solution. This customer platform approach enables HubSpot to support end-to-end customer journey management, strengthening its position as a leader in the CX space.

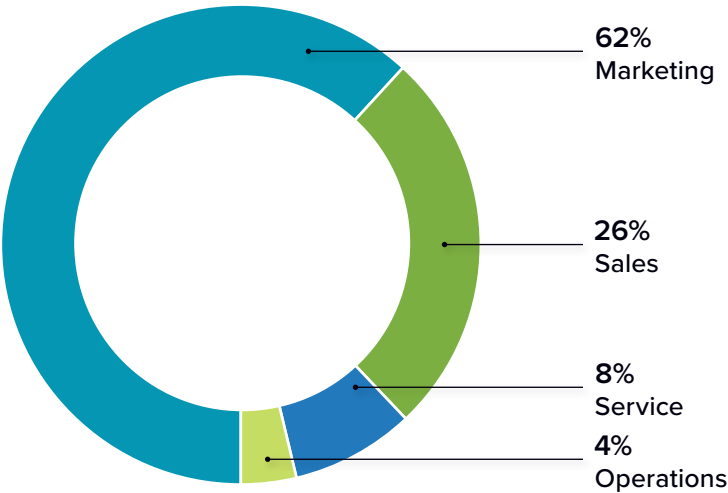
Market adoption reflects this evolution. Currently, 71% of HubSpot customers use two or more hubs, and over a third (36%) have adopted five or more, highlighting the value businesses place on HubSpot's integrated platform. Additionally, 95% of customers use at least one application, and 50% use more than five, underscoring strong demand for cohesive, ecosystem-driven solutions.

HubSpot Customers:



HubSpot’s growth into a true customer platform creates significant opportunities for solution partners to innovate and expand. While solution partners have traditionally focused on sales and marketing solutions — still dominant at 62% of solution partner activity (as shown in **Figure 4**) — multi-hub adoption is driving growth in other areas. Sales-related opportunities, including Sales Hub and Commerce Hub, represent 26% of the share, while Service Hub accounts for 8%. Though smaller at 4%, operations are emerging as a promising growth area owing to the increasing complexity of HubSpot’s customer base and rising demand for AI-driven, data-intensive capabilities that extend beyond traditional SMB needs.

FIGURE 4
Partner Ecosystem Revenue — by Hub
(Percentage of respondents)



n = 139; Source: IDC’s *HubSpot Partner Survey*, November 2024

Multi-Departmental Growth: Sales

AI-driven insights are transforming sales by enhancing lead scoring and account-based marketing and enabling hyper-personalized customer interactions. By leveraging AI, sales teams can focus on high-value prospects and tailor outreach efforts, resulting in more targeted and efficient sales strategies. This shift allows businesses to drive faster and more consistent revenue growth by prioritizing opportunities with the highest conversion potential.

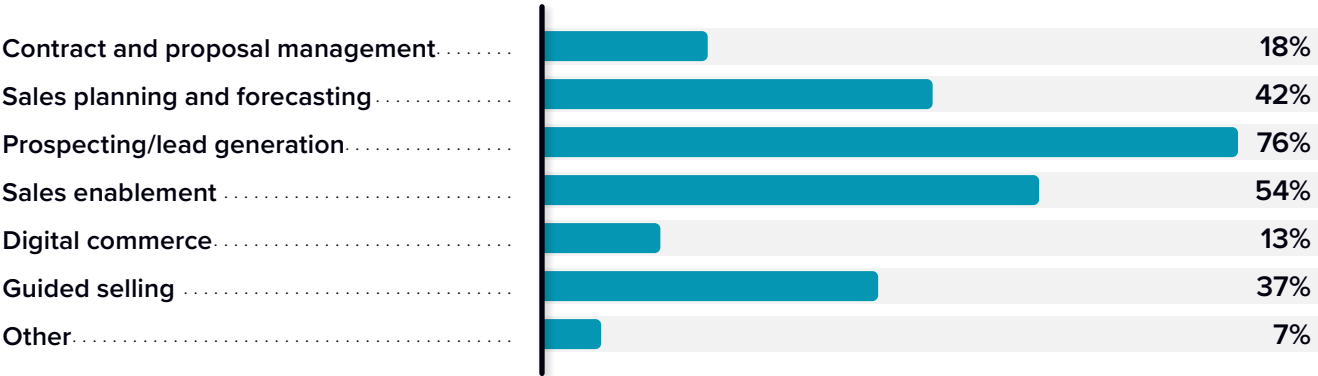
In 2024, IDC identified several generative AI use cases that revolutionized sales, particularly in planning, forecasting, and lead generation. Real-time insights, predictive lead scoring, and automated contract management are increasing sales productivity at early-adopter organizations. Integrating GenAI into sales processes can optimize efficiency, enhance decision-making, and deliver highly customized sales experiences.

GenAI improves planning and forecasting by analyzing deal velocity, prospect inflow, and loss trends while enabling more strategic territory planning to target profitable customers. AI-driven tools that generate tailored sales scripts, presentations, and training materials significantly enhance sales enablement. Personalized email generation, product recommendations, and task automation for CRM updates and proposals transform guided selling.

AI is driving innovations in digital commerce with features such as visual search, virtual try-ons, and AI-powered product discovery, creating more personalized and engaging CX across channels.

A recent HubSpot Solutions partner survey (**Figure 5**) revealed significant interest in AI use cases specific to sales, with many partners expecting strong demand for services to help improve prospecting and lead generation, sales planning and forecasting, and sales enablement in 2025. These findings highlight the growing importance of AI in sales processes and offer partners clear opportunities to meet this demand.

FIGURE 5
Sales
(Percentage of respondents)



n = 139; Source: IDC's HubSpot Partner Survey, November 2024

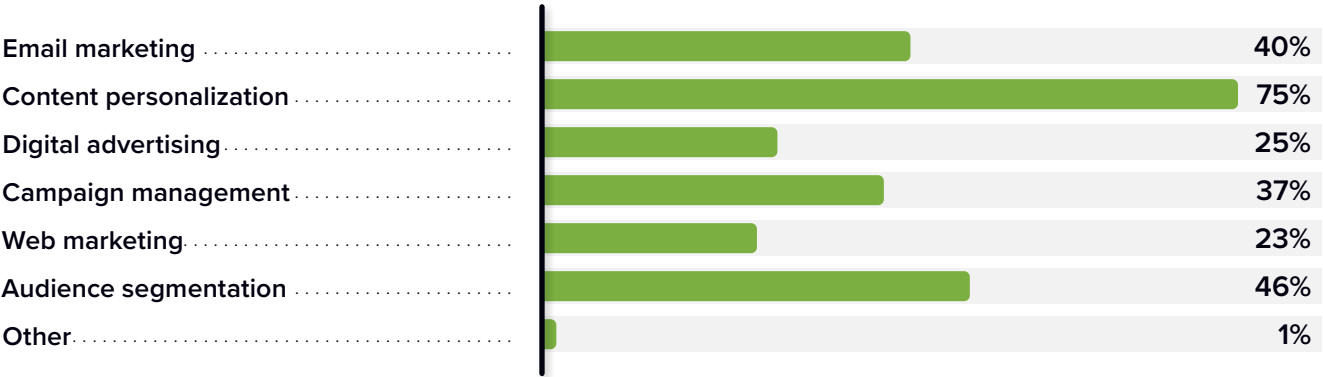
Multi-Departmental Growth: Marketing

The potential of GenAI extends beyond sales into marketing, where it revolutionizes customer segmentation, content creation, and campaign optimization. IDC’s recent research highlights various GenAI use cases that transform marketing practices with AI tools driving dynamic SEO, micro-segmentation, and real-time insights, improving customer engagement and conversion rates. Content marketing benefits from AI’s ability to optimize SEO, generate derivative content, and translate materials for diverse audiences, while campaign marketing uses AI for real-time customer behavior analysis and instant insights. These advancements extend to creative services, where AI automates video creation, audience-tested advertising, and personalized promotions. In web marketing, AI enhances customer intent responses, offering hyper-personalized web pages and tailored offers.

Given the rapidly evolving AI landscape, integrating GenAI into marketing functions offers significant opportunities to improve efficiency, foster innovation, and deliver personalized CX.

A recent HubSpot Solutions partner survey (**Figure 6**) sheds light on the areas where partners expect AI to generate the most demand in 2025. According to the survey, solutions partners anticipate significant growth in AI use cases related to content personalization, email marketing, and audience segmentation.

FIGURE 6
Marketing
(Percentage of respondents)



n = 139; Source: IDC’s HubSpot Partner Survey, November 2024

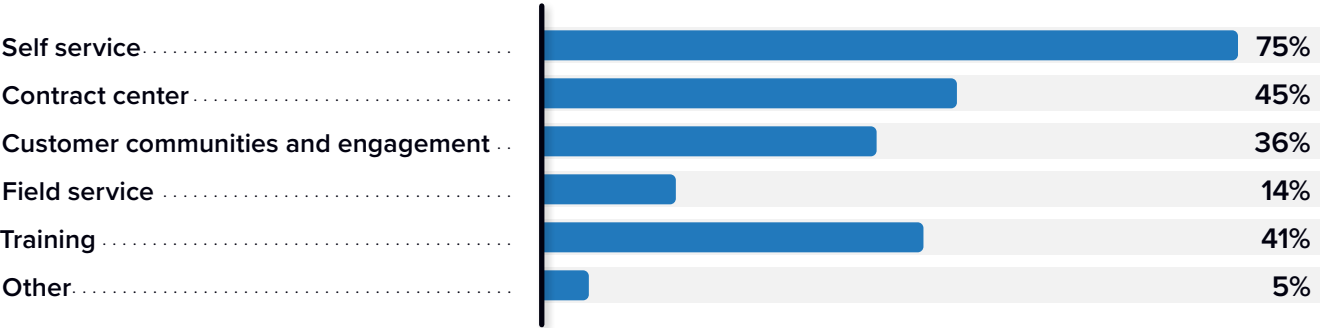
Multi-Departmental Growth: Service

AI advancements in sales, marketing, and service create deeper customer connections, improve operational efficiency, and drive sustained growth. IDC recently identified several GenAI use cases across industries that are revolutionizing customer service, enhancing efficiency, personalization, and satisfaction through intelligent automation and real-time support.

In customer service, AI-powered tools such as chatbots, sentiment analysis, and automated responses have demonstrated their potential to improve customer interactions and streamline operations. Conversational AI and intelligent IVRs guide customers seamlessly through tasks across digital channels, while agent-assist tools surface relevant knowledge, identify gaps, and generate new resources in real time. AI-driven workforce optimization tools enable dynamic scheduling and the determination of workload, employee preferences, and training needs. Additionally, real-time interaction summarization provides sentiment analysis and actionable insights. AI extends to multilingual support, ensuring seamless engagement with diverse customer bases and enhancing satisfaction.

These AI solutions automate tasks and offer highly contextualized, autonomous responses by understanding the customer journey. With real-time issue resolution and the ability to escalate complex concerns, AI reduces friction while maintaining a high standard of care. AI analyzes voice-of-customer feedback in customer engagement to recommend experience enhancements, driving loyalty and innovation. Furthermore, generative AI supports the creation of curated knowledge content, ensuring that customer communities have access to up-to-date information.

FIGURE 7
Service
(Percentage of respondents)



n = 139; Source: IDC's HubSpot Partner Survey, November 2024

The Expanded HubSpot Landscape

From Small Businesses to Larger Midmarket Organizations

The marketing technology industry is shifting as organizations demand robust, data-driven solutions prioritizing composability and usability and delivering rapid results. HubSpot has long excelled in these areas, serving smaller organizations with limited marketing staff by offering easy-to-use, fast-to-deploy, unified tools across front-end functions. Building on this foundation, HubSpot is expanding beyond its traditional small business base (i.e., under 200 employees) and gaining traction with larger, midmarket organizations (i.e., 200–2,000 employees) by addressing their need for scalable, seamless solutions to deliver exceptional CX.

HubSpot has seen traction beyond its SMB roots as it has enhanced its customer platform with data unification, advanced analytics, and AI-driven personalization features. This positions HubSpot as a strong competitor to legacy platforms in the midmarket.

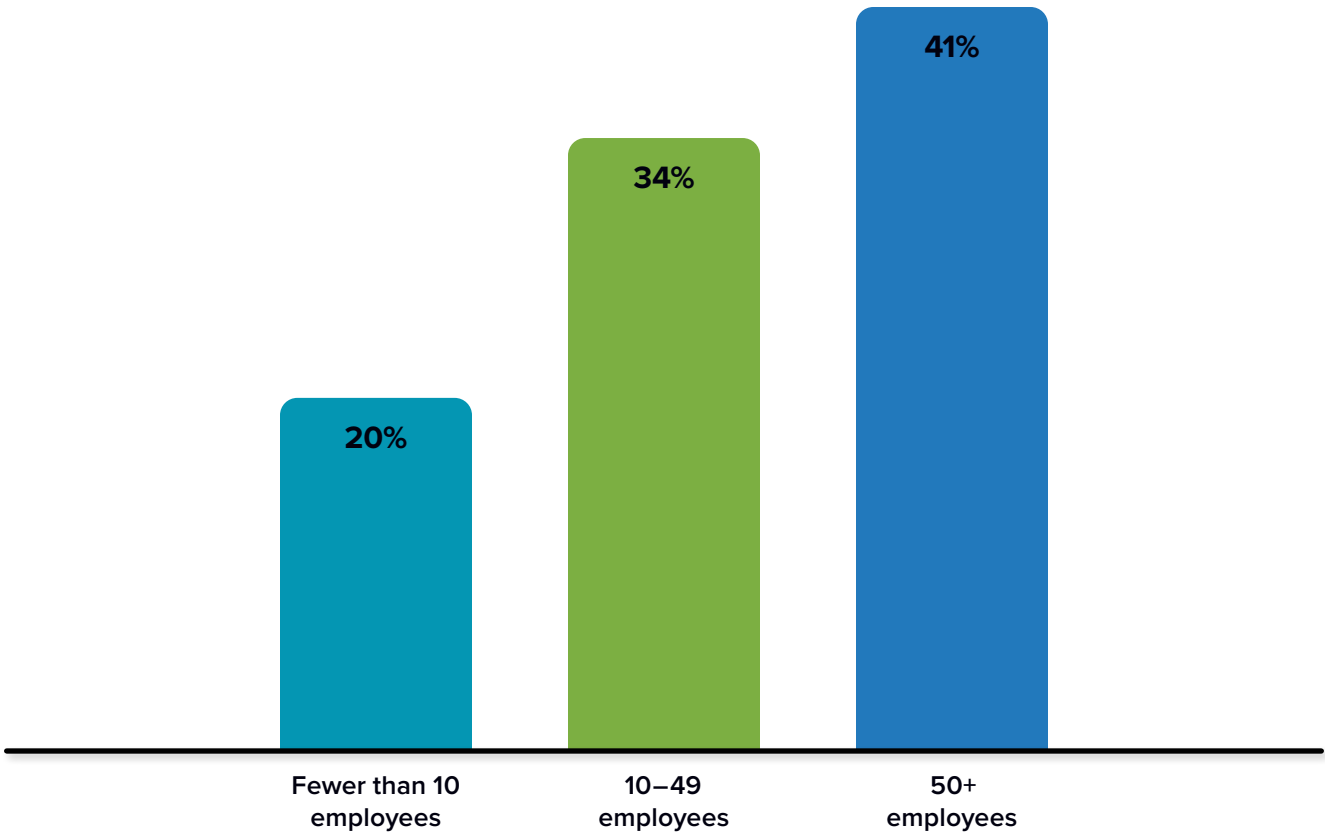


Clients are frustrated with ineffective solutions and the endless expenditure on consultants who fail to deliver value or change. Introducing HubSpot into these scenarios presents a mutually beneficial opportunity. Our services offer significantly more value than what clients are accustomed to with incumbent projects. Displacing incumbent platforms with HubSpot is effective, fosters greater experimentation and innovation, and we're securing accounts 10 times larger than our typical billing level.”

System Integrator

Partners are reaping the benefits of this evolution, and many are helping to lead the way. Larger, more established HubSpot partners with more than 50 employees indicate that they derive over 40% of their business from larger clients (see **Figure 8**, next page).

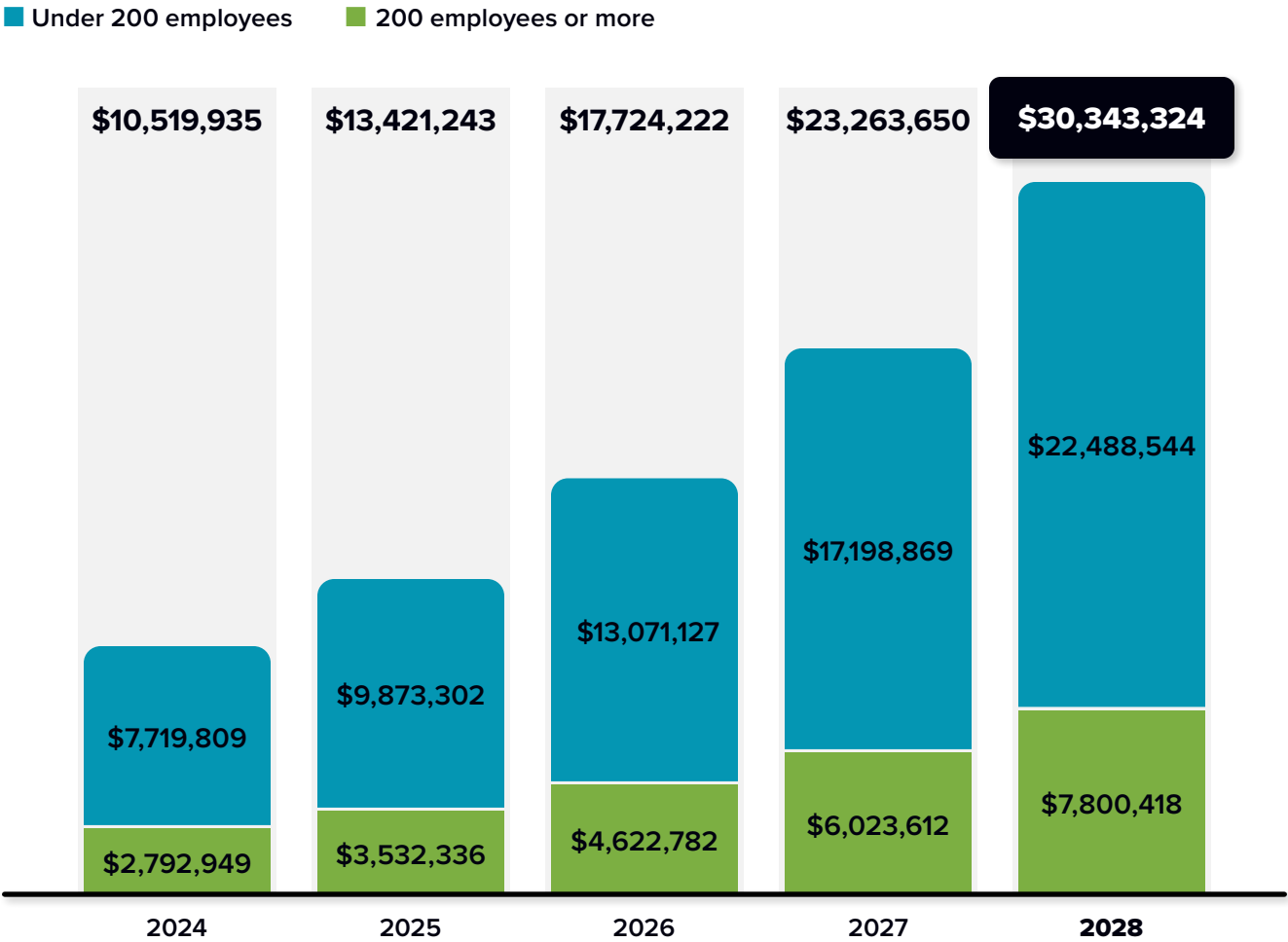
FIGURE 8
Revenue Derived from Large Clients (i.e., <200 employees or more)
(Percentage)



n = 139; Source: IDC's *HubSpot Partner Survey*, November 2024

In line with the dynamics indicated in the survey, IDC forecasts a compelling growth trajectory for HubSpot's ecosystem of approximately 30% by 2028. Notably, the overall ecosystem opportunity within larger companies (those with over 200 employees) will exceed \$7 billion by 2028 (see **Figure 9**), signaling a significant shift in the market landscape. Starting from a modest base in 2024, partners project that the contribution from larger clients will account for a substantial share of the total ecosystem opportunity by 2028. This shift underscores that larger enterprises recognize the strategic value of HubSpot's platform to address their marketing, sales, and service needs, driving accelerated investment and growth as HubSpot and its partners expand beyond the traditional SMB space.

FIGURE 9
HubSpot Ecosystem Opportunity by Company Size
(\$US Millions)



Source: IDC 2025

For an accessible version of the data in this figure, see [Figure 9 Supplemental Data](#) in the Appendix.

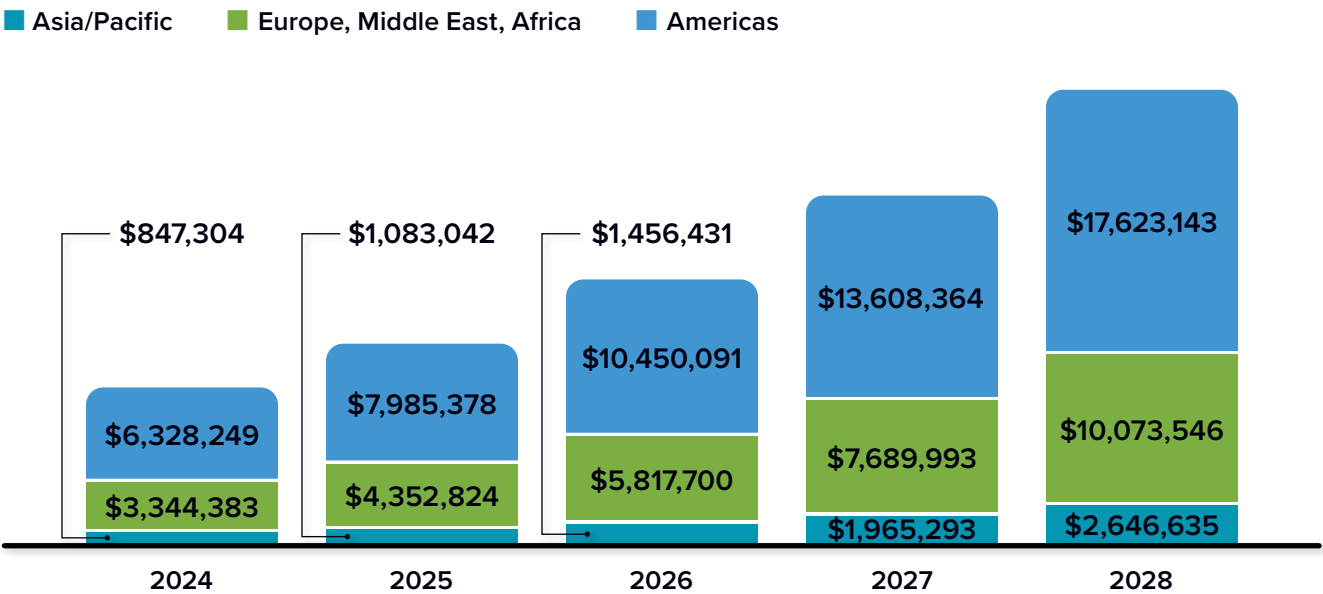
Larger deployments involve more technical complexity and require industry-specific expertise. For example, the life sciences sector demands a deep understanding of unique terminology and procedures, while financial services require a strong grasp of compliance regulations. Partners with this specialized knowledge are essential in guiding customers through best practices and creating solutions tailored to the needs of larger organizations. Many HubSpot service partners identified vertical expertise as a key differentiator and a valuable business opportunity during IDC interviews.

From Local Companies to Multi-Region and Global Organizations

As HubSpot evolves into a global platform, its partners benefit from a more regionally diverse addressable market. With investments in datacenters, multilingual capabilities, and strategies for international expansion, HubSpot will support global deployments. Partners are seizing new opportunities by helping customers navigate regional challenges such as compliance, cultural nuances, and localization, solidifying HubSpot’s global marketing technology landscape leadership.

Figure 10 illustrates the evolving geography of the HubSpot ecosystem opportunity, highlighting steady growth in the Americas, a significant upward trajectory in EMEA, and consistent expansion in APAC, which, while currently smaller, offers untapped potential. This geographic diversity underscores HubSpot’s growing global footprint and the increasing demand for its marketing, sales, and service platforms worldwide, presenting a compelling opportunity for regional partners with local expertise.

FIGURE 10
HubSpot Ecosystem Opportunity by Region
(\$US Millions)



Source: IDC 2025
For an accessible version of the data in this figure, see [Figure 10 Supplemental Data](#) in the Appendix.

AI's potential hinges on access to clean, unified data from core systems, such as HubSpot's platform, and tightly integrated complementary applications, such as those in the HubSpot Marketplace.

Mastering technical, industry-specific, and cultural nuances of global business expansion is crucial for growth. Partners with expertise in these areas will remain indispensable, empowering businesses to unlock HubSpot's full potential worldwide. As HubSpot's global footprint expands, opportunities will grow for midmarket and SMBs alike to achieve scalable, sustainable growth through strategic collaboration.

Operations Hub: A Powerful Partner Lever to Unleash AI's Potential

The Operations Hub will become a foundational element for users and partners. While it may only represent ~4% of partners' revenue streams (see **Figure 4**), operational tasks such as data cleansing, curation, and governance are critical prerequisites for successful AI implementation and sustained business growth.

AI's potential hinges on access to clean, unified data from core systems, such as HubSpot's platform, and tightly integrated complementary applications, such as those in the HubSpot Marketplace. This makes the operations layer indispensable for enabling AI success.

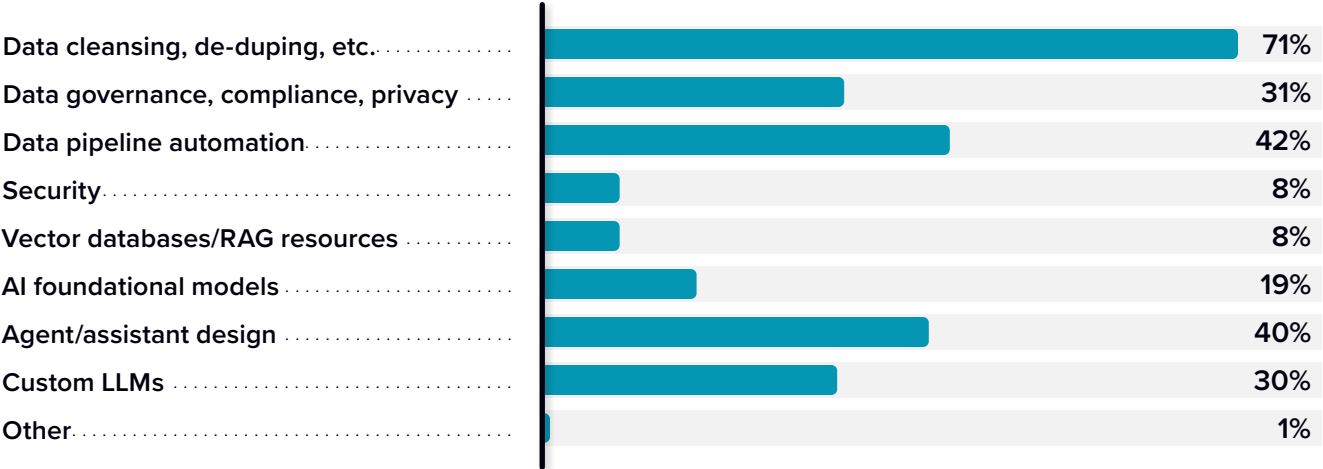
Many organizations have fragmented data across siloed systems, making operational efforts essential in creating a reliable, streamlined flow of accurate and well-governed information. Partners play a key role, offering expertise in data unification, governance, and integration — capabilities vital to unlocking AI-driven insights and automating key business functions, including marketing, sales, and service.

As shown in Figure 11 (next page), from a recent partner survey, various technical requirements show increased customer demand levels as we move into 2025, including data cleansing/deduplication, data pipeline automation, and agent design.

FIGURE 11

Data

(Percentage of respondents)



n = 139; Source: IDC's HubSpot Partner Survey, November 2024

As HubSpot continues to evolve into a comprehensive customer platform, its partners will be instrumental in helping businesses fully harness its capabilities. With the rising demand for AI-powered tools, the growing adoption of HubSpot's customer platform creates significant opportunities for partners to drive client success. Those who embrace this shift and deliver innovative, data-focused services will lead in the next wave of business growth. By understanding the intersection of operations, data, and AI, partners can play a pivotal role in shaping CX's future and unlocking new success levels for businesses leveraging HubSpot's expanding ecosystem.

Conclusion

As HubSpot embraces the age of AI, partner opportunities will expand significantly. The ecosystem is shifting toward three key growth areas: widespread integration of AI, multi-departmental platform strategies, and more complex enterprise-grade deployments. These trends signal a future where HubSpot's platform drives innovation and profitability for its partners. Partners will succeed in a data-driven, AI-enabled landscape by leveraging AI's transformative potential, embracing HubSpot's customer platform offering, and supporting larger, more intricate implementations.

IDC forecasts substantial growth in the AI services and applications market, with the HubSpot ecosystem's potential for technical, creative, and application services reaching over \$30 billion. This offers a wealth of opportunities for partners across industries. With HubSpot's expanding global reach, now is the ideal time for partners to invest in capabilities that address current needs while preparing for future challenges.

“

With AI at the forefront and unified approaches to customer engagement an enterprise necessity, HubSpot's partners are uniquely positioned to capitalize on a rapidly expanding market, unlocking new revenue streams worth over \$30 billion by 2028.”

Appendix:

Supplemental Data

This appendix provides an accessible version of the data for the complex figures in this document. Click “Return to original figure” below each table to get back to the original data figure.

FIGURE 1 SUPPLEMENTAL DATA
HubSpot Ecosystem (Apps and Services) Opportunity AI and Non-AI Components

Components	2024	2025	2026	2027	2028
Non-AI	\$7,856,595	\$9,815,705	\$12,510,798	\$15,998,554	\$20,092,902
AI	\$2,663,340	\$3,605,538	\$5,213,423	\$7,265,096	\$10,250,422
Total	\$10,519,935	\$13,421,243	\$17,724,222	\$23,263,650	\$30,343,324

Source: IDC 2025
[Return to original figure](#)

FIGURE 2 SUPPLEMENTAL DATA
Primary Business Challenges In Moving AI Projects from Pilot to Product

Business Challenges	Under 200 employees	200 employees or more
Business process integration	37%	33%
Competing internal priorities	49%	17%
Management buy-in	9%	17%
Unclear ROI/business case	49%	33%
Regulatory or compliance concerns	14%	17%
Technical integrations	17%	17%

Continued on the next page ►

Appendix: Supplemental Data (continued)

◀ Continued from the previous page

Business Challenges	Under 200 employees	200 employees or more
Skill gaps in AI/ML expertise	66%	67%
Data quality or availability issues	26%	33%
Lack of technical infrastructure	23%	17%

n = 139; Source: IDC's *HubSpot Partner Survey*, November 2024

[Return to original figure](#)

FIGURE 9 SUPPLEMENTAL DATA
HubSpot Ecosystem Opportunity by Company Size

Company Size	2024	2025	2026	2027	2028
Under 200 employees	\$7,719,809	\$9,873,302	\$13,071,127	\$17,198,869	\$22,488,544
200 employees or more	\$2,792,949	\$3,532,336	\$4,622,782	\$6,023,612	\$7,800,418
Total	\$10,519,935	\$13,421,243	\$17,724,222	\$23,263,650	\$30,343,324

Source: IDC 2025

[Return to original figure](#)

Appendix: Supplemental Data (continued)

FIGURE 10 SUPPLEMENTAL DATA
HubSpot Ecosystem Opportunity by Region

Region	2024	2025	2026	2027	2028
Americas	\$6,328,249	\$7,985,378	\$10,450,091	\$13,608,364	\$17,623,143
Europe, Middle East, Africa	\$3,344,383	\$4,352,824	\$5,817,700	\$7,689,993	\$10,073,546
Asia/Pacific	\$847,304	\$1,083,042	\$1,456,431	\$1,965,293	\$2,646,635

Source: IDC 2025
[Return to original figure](#)

About the IDC Analysts



Roger Beharry Lall

Research Director, Advertising Technologies and SMB Marketing Applications, IDC

With over 25 years' experience leading technology driven marketing programs, Mr. Beharry Lall is now a Research Director with IDC covering Advertising Technologies and SMB Marketing Applications. He brings a unique multidisciplinary perspective, evangelizing the innovative and pragmatic use of both martech and adtech solutions for companies of all sizes.

[More about Roger Beharry Lall](#)



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Gerry 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.

[More about Gerry Murray](#)

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