

CRM MARKET INTELLIGENCE

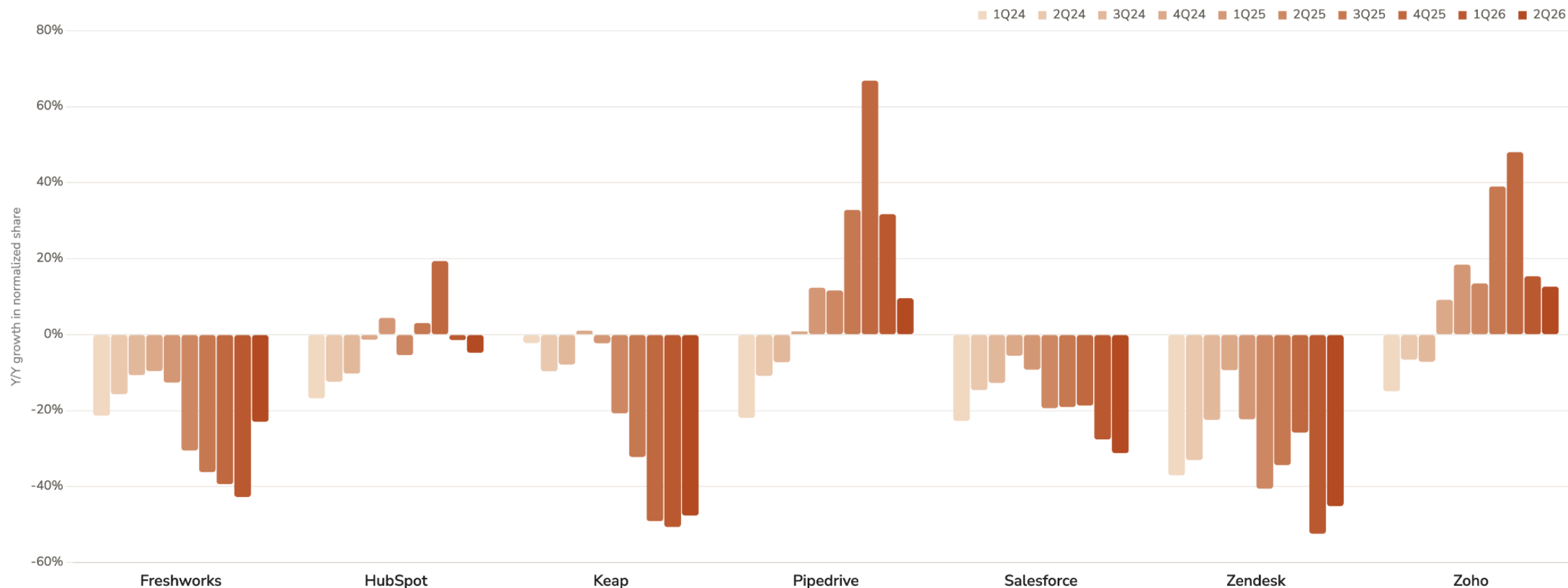
HubSpot's position in the CRM market

Share, attention, ecosystem, and ad spend — a quick read on where HubSpot sits: the baseline to measure against as customer trust settles after a reversed data-sharing plan.



HubSpot holds firm as Pipedrive and Zoho climb

Across CRM tools, Pipedrive and Zoho are the only players gaining normalized customer share over the period, with Pipedrive peaking above 60% Y/Y growth. HubSpot stays steady while Freshworks, Keap, Zendesk, and Salesforce give up relative share — leaving HubSpot the most stable of the established platforms.



Note: Each brand reflects only its core CRM product (e.g., Zoho CRM, HubSpot CRM/Sales, Salesforce Sales Cloud, Freshworks CRM/Freshsales, Zendesk Sell), not the vendor's full product family.

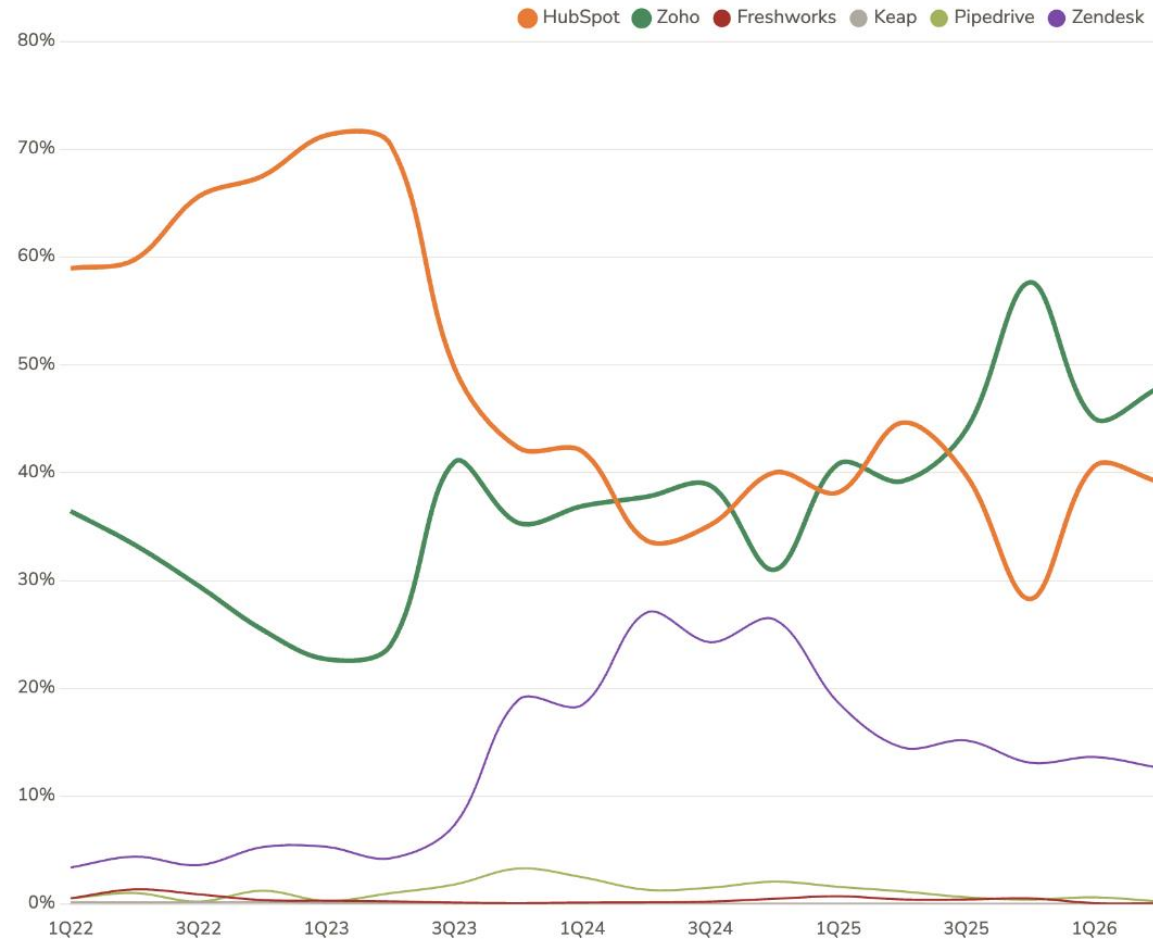
Source: Carbon Arc App Technology Detections — CA0043C
 Price: requires row-level access, available via Carbon Arc Block



CRM: who wins attention vs. who wins the enterprise

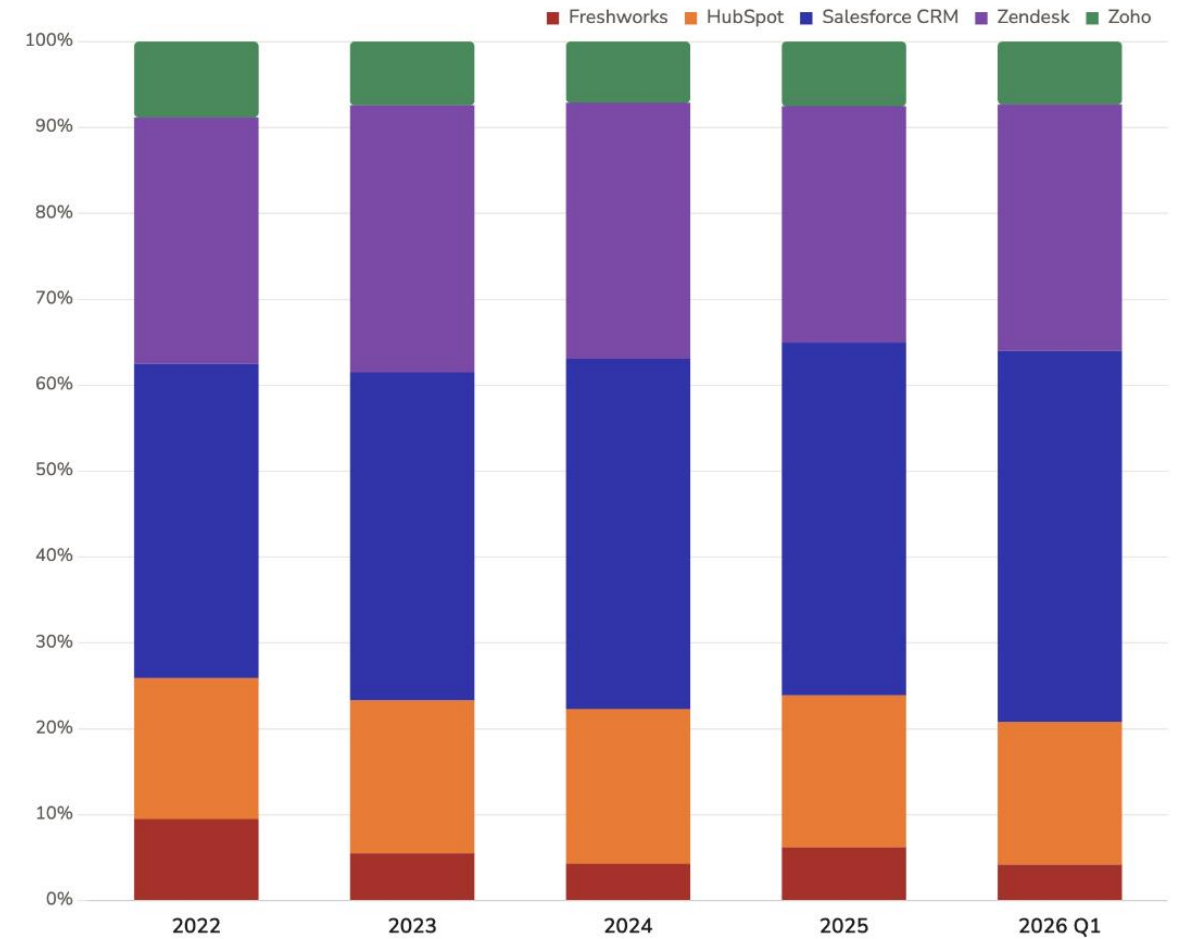
Share of CRM web traffic

Tracked vendors, excl. Salesforce — who wins attention



Share of companies transacting

5-vendor CRM set, Carbon Arc panel — who wins the enterprise



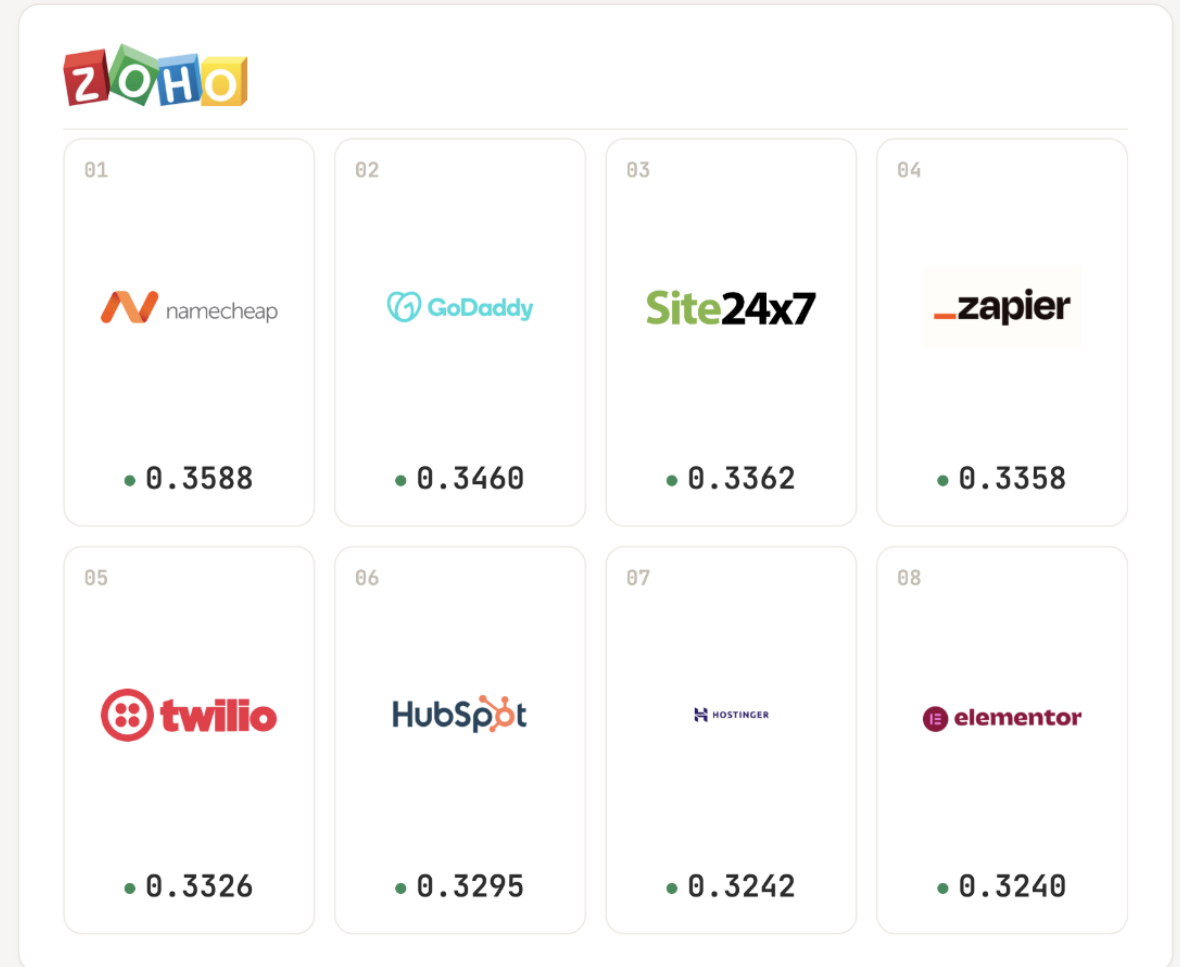
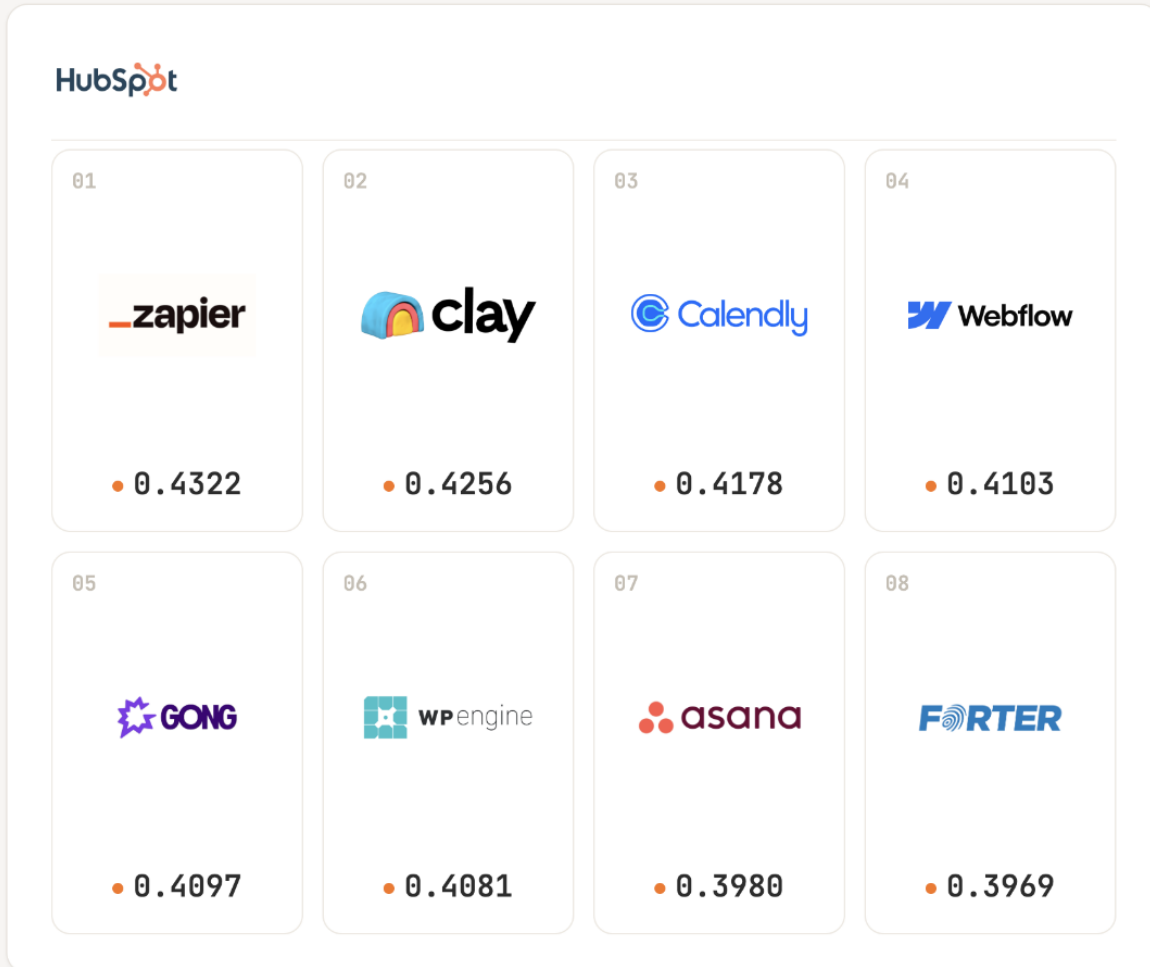
Adoption, not spend. Panel skews enterprise/mid-market and omits SMB-tier tools (Keap, Pipedrive); web traffic captures broader, SMB-weighted interest. 2026 Q1 = complete months only.

Left: Carbon Arc Clickstream — CA0030 · 14.29 Tokens
 Right: Carbon Arc SaaS Market Dynamics — CA0093 · requires Carbon Arc Block



Following the clicks: the company HubSpot and Zoho users keep

Affinity scores show the sites each audience most often also visits — higher affinity means stronger co-visitation. The overlap maps each platform's surrounding ecosystem, and, for churn watchers, the adjacent tools a departing customer already lives in.

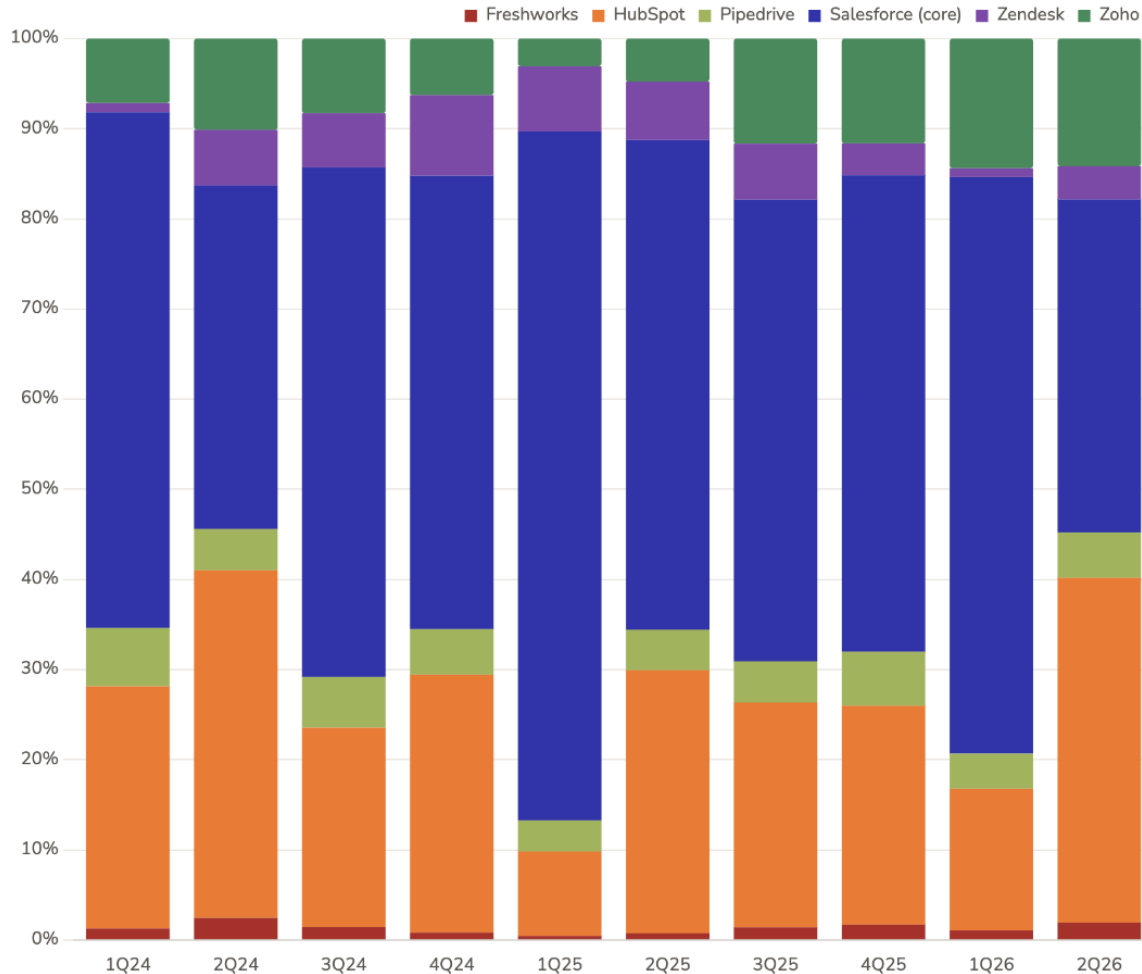




CRM category ad spend: share of voice and channel mix

Quarterly share of voice

Salesforce and HubSpot dominate through mid-2026



2025 channel mix

Divergent media strategies across the six brands

