

## 2023 Wrap-up: Benchmarks from 34,000+ companies

paddle





### **Stephen Ngo**

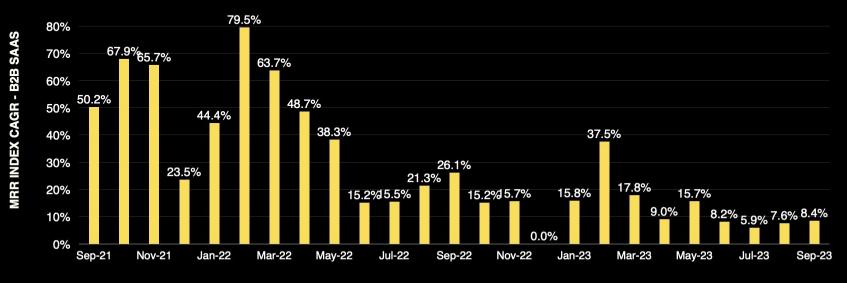
Metrics & Market Research, Paddle Former Head of Growth, ProfitWell



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## You know it's coming: Growth is much slower in SaaS.

#### 2023 SaaS revenue growth has slowed to 7-8%



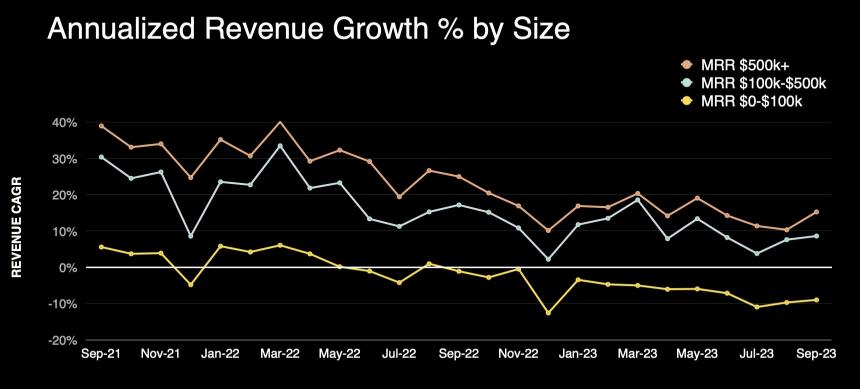
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### Startups were hit much harder.



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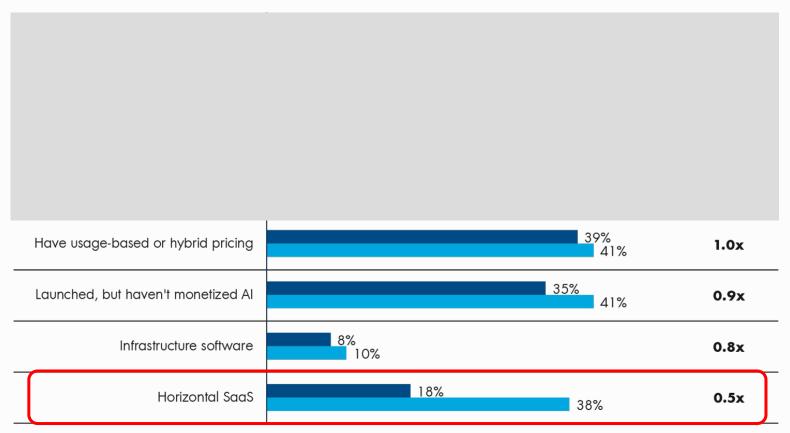
### Horizontal SaaS is underperforming.



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#### WHAT INFLUENCES BEING AN OUTLIER

Share of outliers Share of non-outliers



Those who sell to early adopters have slowed down the most:

- SMB and Prosumer
- Horizontal SaaS
- Selling to other SaaS



### What's happening here?

Saturation.



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#### 

#### 2023 Marketing Technology Landscape May 2023

Advertising and Promotion	Content and Experience	Social and Relationships	Commerce and Sales	Data	Management
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### But there are pockets of resilience.

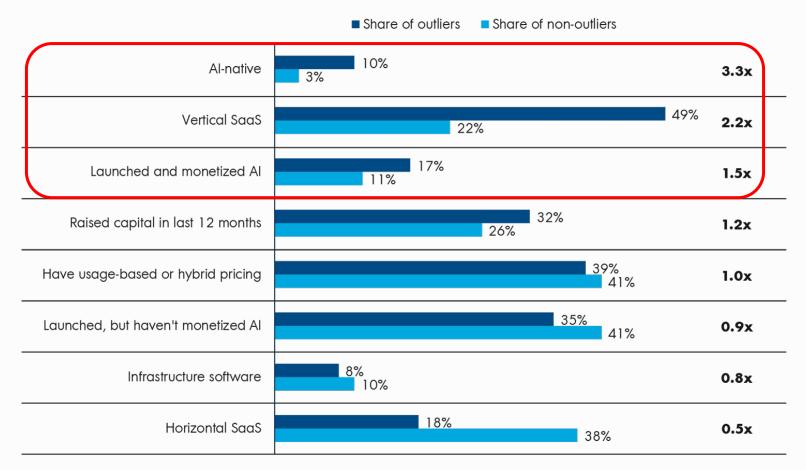


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# Vertical SaaS and Al-native products are outperforming.

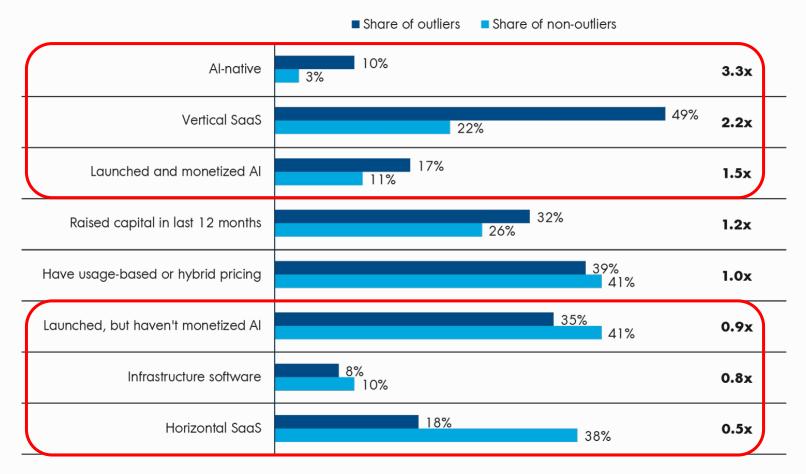


#### WHAT INFLUENCES BEING AN OUTLIER



# Companies that monetize AI as part of their core product are growing faster.

#### WHAT INFLUENCES BEING AN OUTLIER



# Companies that take part in "AI washing" don't perform better.



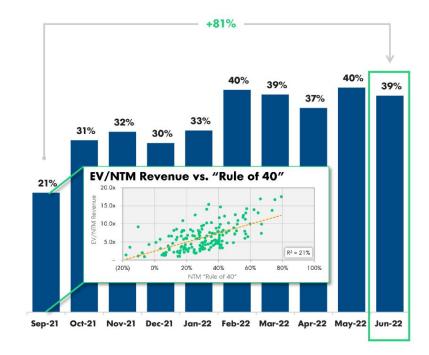
### Investors value efficiency over growth.

#### (48%) 57% 57% 55% 52% 52% 51% 46% 45% 36% EV/NTM Revenue vs. NTM Growth 20.0x 27% 15.0x N 10.0x EV/N 5.0x $R^2 = 52\%$ 60% 80% 100% (20%) 0% 20% 40% NTM Revenue Growth Nov-21 Dec-21 Jan-22 Feb-22 Mar-22 Apr-22 May-22 Jun-22 Sep-21 Oct-21

VALUATION EXPLAINED BY "NTM GROWTH" Historical R-Squares<sup>(1)</sup>

#### VALUATION EXPLAINED BY "RULE OF 40"

Historical R-Squares<sup>(2)</sup>



Note: 1. R-Square of EV/NTM Revenue regressed against NTM Revenue Growth Rate. 2. R-Square of EV/NTM Revenue regressed against NTM "Rule of 40".

Source: Company filings and Pitchbook as of 06/15/22.

# In a slow investment market, you must find levers to grow without heavy capital.

## Your goals are:

Survive on limited capital
 Find a path to profitability



### 4 ways to survive and find profitability:

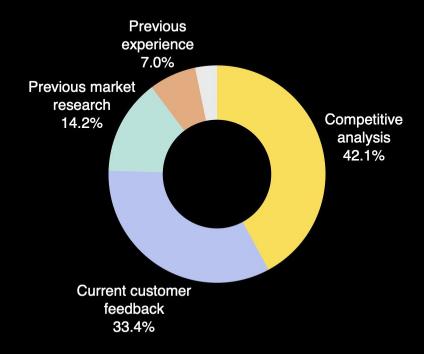


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- 4 ways to survive and find profitability:
- 1. Differentiate your positioning & pricing

## Most SaaS companies base pricing research too much on competitors or current customers.

#### Most Common Inputs to the Pricing Research Process





# These inputs often bias SaaS products to all look the same.



# Most SaaS products aren't as differentiated as you think.



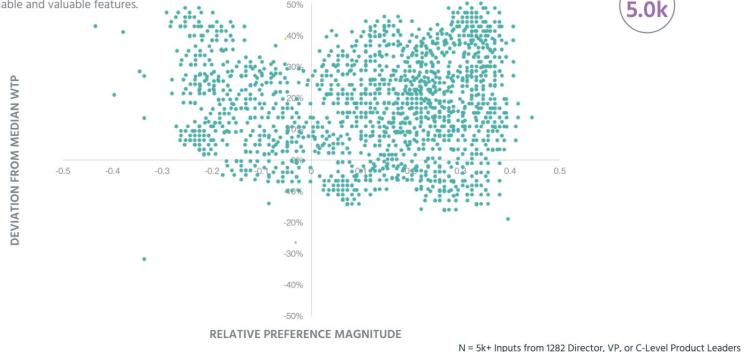
#### WE'RE BUILDING THE WRONG PRODUCT

#### Calculating the expected impact of product on growth



#### What We Think We're Building

This is what your product leaders indicated they're building for the last five thousand features they built. A lot of differentiable and valuable features.

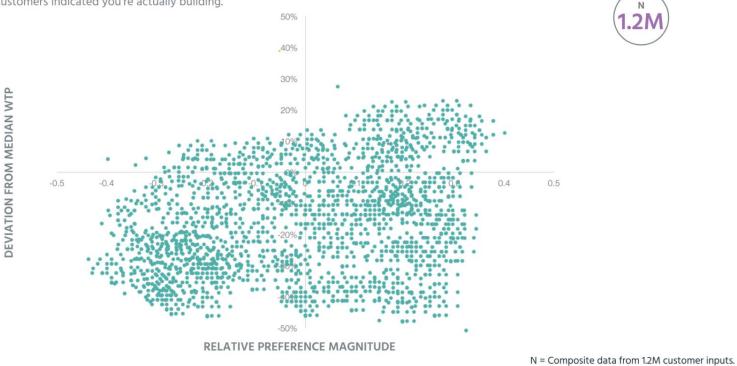


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#### WE'RE BUILDING THE WRONG PRODUCT

#### What We're Actually Building

This is what your customers indicated you're actually building.



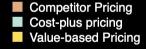
## Low willingness-to-pay is often a signal of poor differentiation.



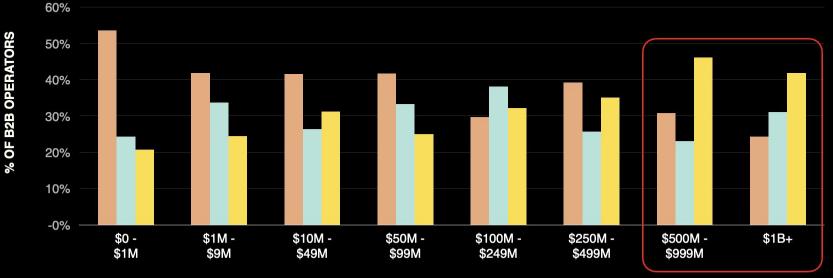
# Value-based pricing aligns your product strategy with what the market values most.



## Value-based Pricing is heavily used by the largest SaaS companies

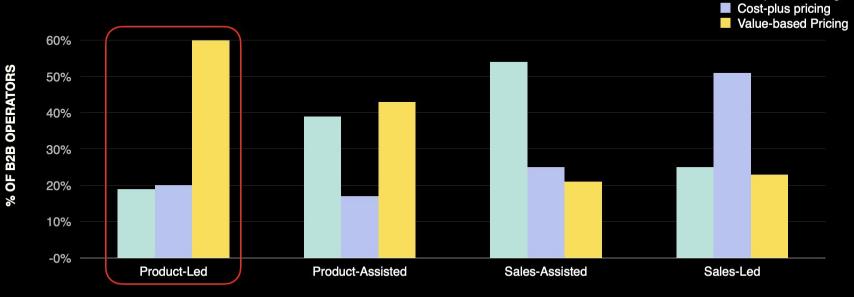


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ANNUAL REVENUE

## Value-based pricing is critical for product-led and product-assisted businesses



**GO-TO-MARKET MODEL** 

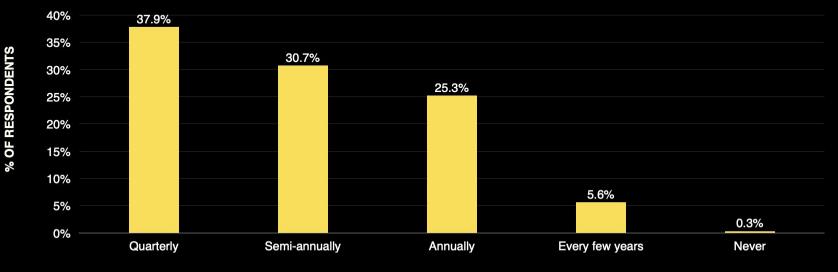


Competitor Pricing

### Don't be afraid to update pricing regularly

### (as long as it's communicated properly)

## 69% of SaaS pricing leaders update their strategy every 3-6 months.



FREQUENCY OF PRICING CHANGES



- 4 ways to survive and find profitability:
- 1. Differentiate your positioning & pricing

- 4 ways to survive and find profitability:
- Differentiate your positioning & pricing
   Leverage PLG for acquisition

# Product-led GTM models are now common, especially among early adopters.

### **2023 PLG ADOPTION HEATMAP**

Not PLG

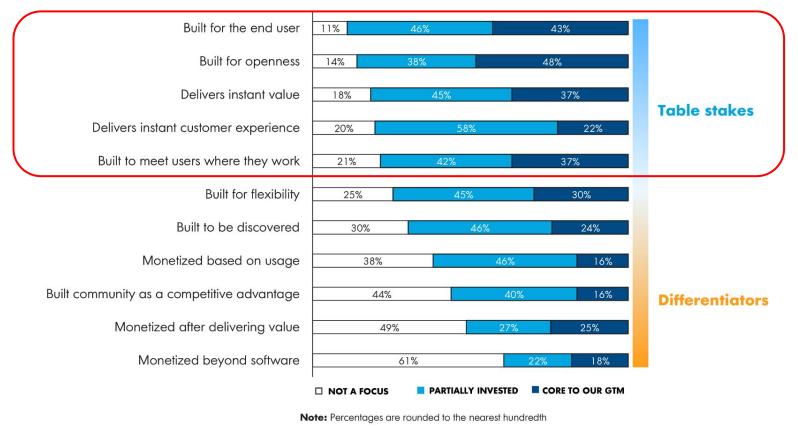
**PLG is Table Stakes** 

	DEVELOPERS	MARKETING	FINANCE	LEGAL	VERTICAL	SALES
Very Small Businesses (<20 employees)	64%	<b>57</b> %	53%	50%	<b>49</b> %	<b>45</b> %
Small and Medium Businesses (20–100 employees)	<b>70</b> %	54%	43%	40%	36%	41%
<b>Midmarket Businesses</b> (101–1000 employees)	61%	44%	<b>27</b> %	35%	18%	37%
Enterprise Businesses (1000+ employees)	54%	33%	24%	18%	11%	30%

# Product-led growth makes SaaS easy to adopt, and shortens time to value.



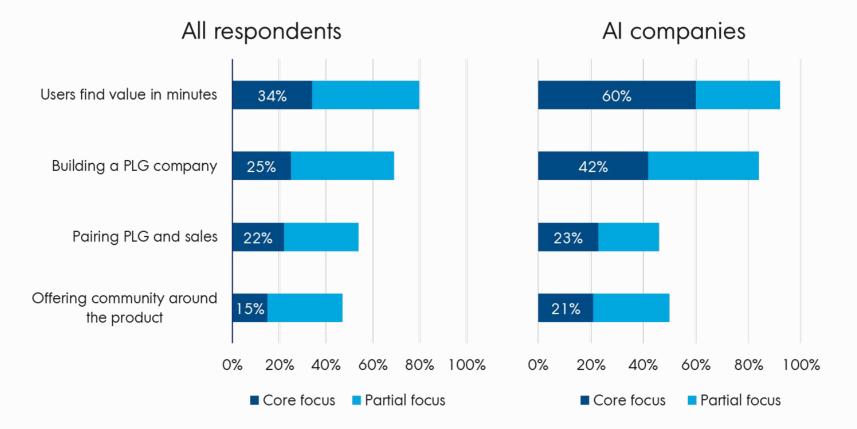
#### **11 PRINCIPLES OF PLG** Tactic adoption



Source: 2022 OpenView SaaS Benchmarks Report

# Al-native companies are especially effective at product-led growth.

#### **PRODUCT-LED GROWTH AND AI**



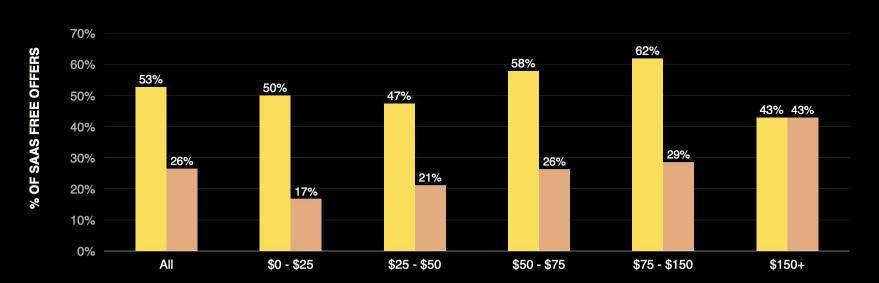
# PLG is now often table stakes for acquisition, especially when targeting early adopters.

PLG is now often table stakes for acquisition, especially when targeting early adopters.

It's increasingly needed just to get a foothold in the market.



### Type of Free Product Offering by Price Point

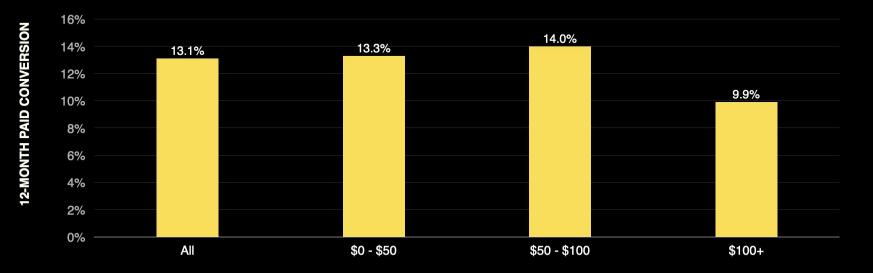


**AVERAGE REVENUE PER USER (ARPU)** 

Trial Led
 Freemium Led

### Free Trial to Paid Conversion by Price Point

% Users Converted



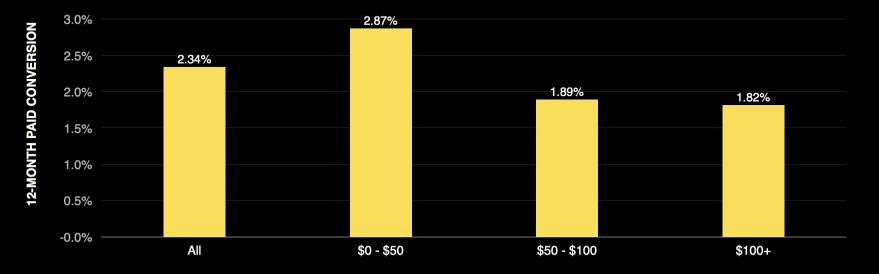
**AVERAGE REVENUE PER USER (ARPU)** 



### Freemium to Paid Conversion by Price Point

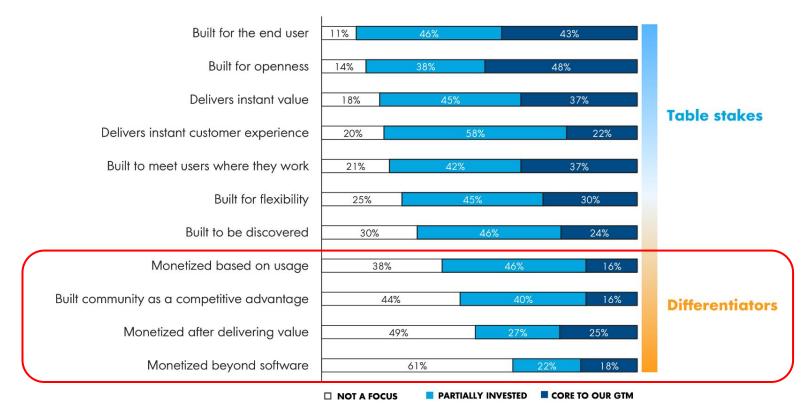
% Users Converted

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**AVERAGE REVENUE PER USER (ARPU)** 

#### **11 PRINCIPLES OF PLG** Tactic adoption



Note: Percentages are rounded to the nearest hundredth

Source: 2022 OpenView SaaS Benchmarks Report

# A PLG-only model often leaves money behind when it comes to monetization.

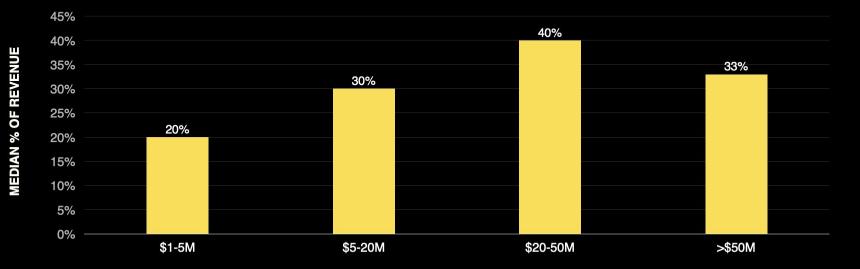


- 4 ways to survive and find profitability:
- Differentiate your positioning & pricing
   Leverage PLG for acquisition

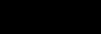
- 4 ways to survive and find profitability:
- 1. Differentiate your positioning & pricing
- 2. Leverage PLG for acquisition
- 3. Expand with Product-Led Sales (PLS)

# Expansion revenue is much easier to acquire than new customers.

### Larger companies generate more growth from expansion revenue

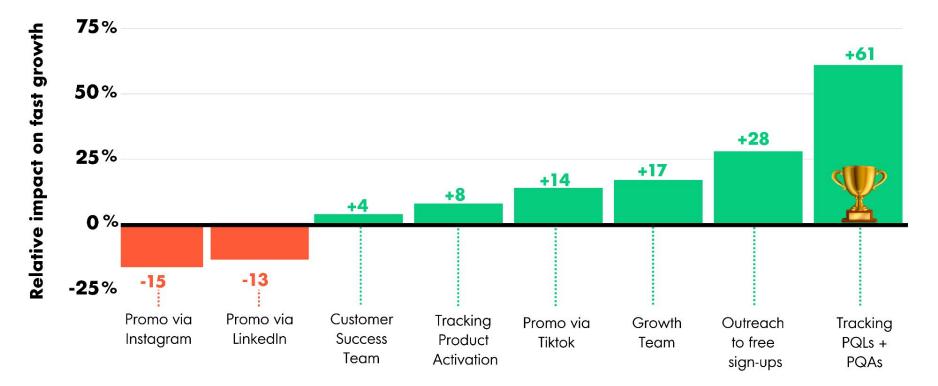


**ANNUAL RECURRING REVENUE (ARR)** 





### WHAT INFLUENCES FAST GROWTH IN 2023

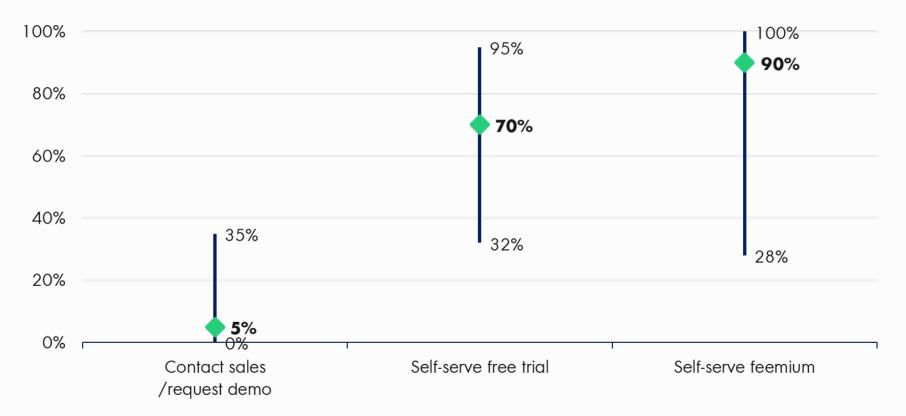


How to leverage Product-led Sales:

- Track product usage as intent data
- Sales incentivized to drive value
- Packaging optimized for expansion
- Pricing matches customer value



#### **PRODUCT-INFLUENCED REVENUE: A WAY TO ASSESS PLG EFFICIENCY**



- 4 ways to survive and find profitability:
- 1. Differentiate your positioning & pricing
- 2. Leverage PLG for acquisition
- 3. Expand with Product-Led Sales (PLS)

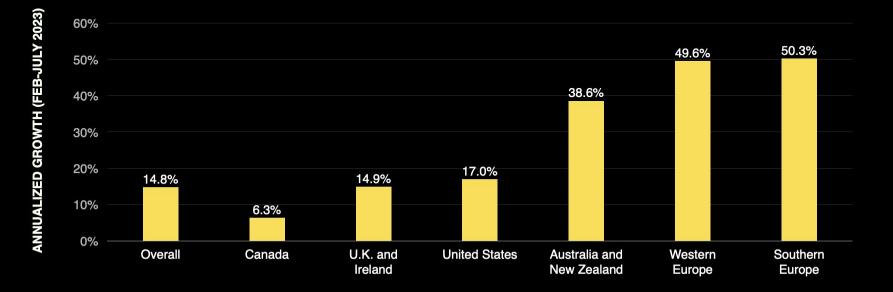
### 4 ways to survive and find profitability:

- 1. Differentiate your positioning & pricing
- 2. Leverage PLG for acquisition
- 3. Expand with Product-Led Sales (PLS)
- 4. Address Tier 2 markets



# We're seeing SaaS grow faster in secondary markets.

### SaaS is growing faster outside North America/UK



SOURCE: ProfitWell by Paddle, B2B SaaS Index 2/1/23 - 8/1/23

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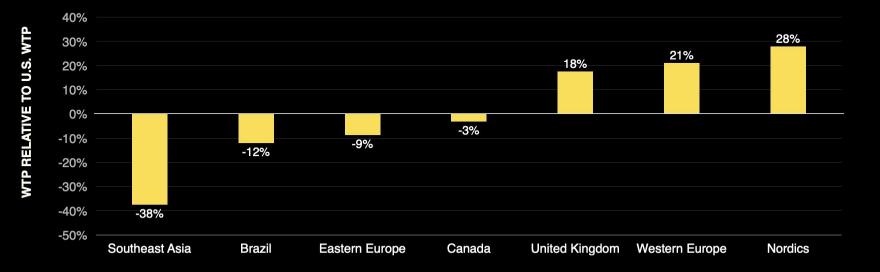
## But most SaaS companies don't take basic steps to address those markets.

### They don't localize their pricing.

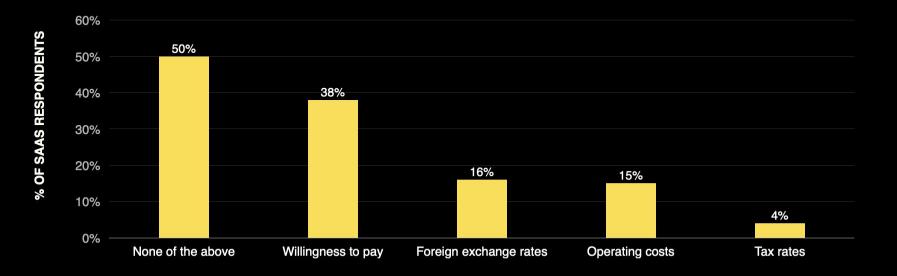


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### Customers in different regions have varying willingness to pay...



### ...but 50% of SaaS operators don't localize prices



SOURCE: OpenView, 2023 SaaS Benchmarks Report (coming November)

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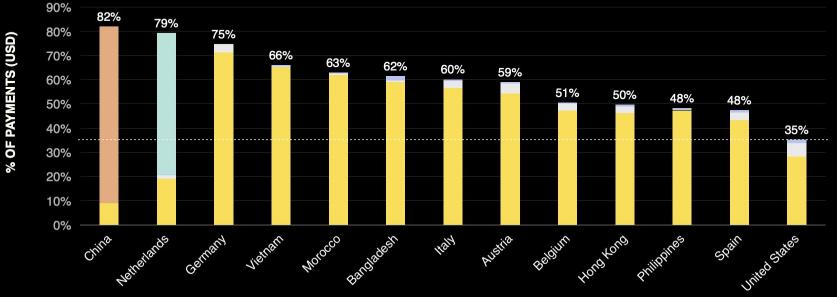
### They don't allow local purchasing methods.



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#### Regions with most non-card payment methods

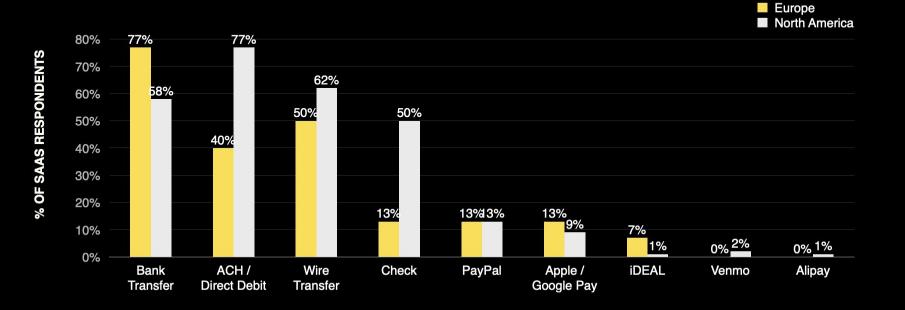




SOURCE: Paddle Billing, % of revenue for vendors allowing multiple payment methods (2023)

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#### Payment methods offered by SaaS companies



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SOURCE: OpenView, 2023 SaaS Benchmarks Report (coming November)

# If your competitors aren't selling overseas, that's a ripe opportunity for you.

### Where should you get started?

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### Break the world into 3 tiers:



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#### Break the world into 3 tiers\*

#### Tier 1: Acquisition, monetization naturally happening

- Developed markets likely representing most of your users
- English-native, used to paying in USD, similar cultural preferences
- Few changes needed to sell here.

#### \* Tiers will vary by product

Break the world into 3 tiers\*

Tier 1: Acquisition, monetization naturally happening

#### Tier 2: Some acquisition happening, monetization is poor

- Relatively developed markets where you naturally acquired some users
- Fewer English speakers, want to use different currencies or payment methods, different expectations of sales process, distinct regulatory needs (ex: GDPR)
- Internationalize here in the first 1-3 years.

\* Tiers will vary by product



Break the world into 3 tiers\*

Tier 1: Acquisition, monetization naturally happening

Tier 2: Some acquisition happening, monetization is poor

Tier 3: Poor acquisition and monetization at outset

- Foundational product, go-to-market, operational adjustments needed
- This is a priority for 5+ years from now.

\* Tiers will vary by product



## Identify your Tier 2 markets and start there.



# Is your international growth strategy a hot mess?

I bet your company is just putting on the 'Internationalization Theater.'

ELENA VERNA







Thanks to <u>Paddle</u> for collaborating on the post! Paddle helps you simplify and automate your billing operations so you can focus on growth *f* 

#### Woof, that was a lot.



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# Let's quickly recap:



### Find levers to grow without heavy capital:

Find levers to grow without heavy capital:1. Differentiate your positioning & pricing.

Find levers to grow without heavy capital:1. Differentiate your positioning & pricing.2. Apply PLG principles to drive adoption.

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Find levers to grow without heavy capital:

- 1. Differentiate your positioning & pricing.
- 2. Apply PLG principles to drive adoption.
- 3. Use Product-Led Sales to monetize/expand.
- 4. Enable users in Tier 2 countries to purchase.



#### Want to see more data?



# First look into OpenView's 2023 SaaS Benchmarks

November 16th paddle.com/benchmarks-2023

paddle OPEINVIEW



paddle

Andrew Davies, CMO of Paddle

OPENVIEW



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#### **Stephen Ngo**

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