

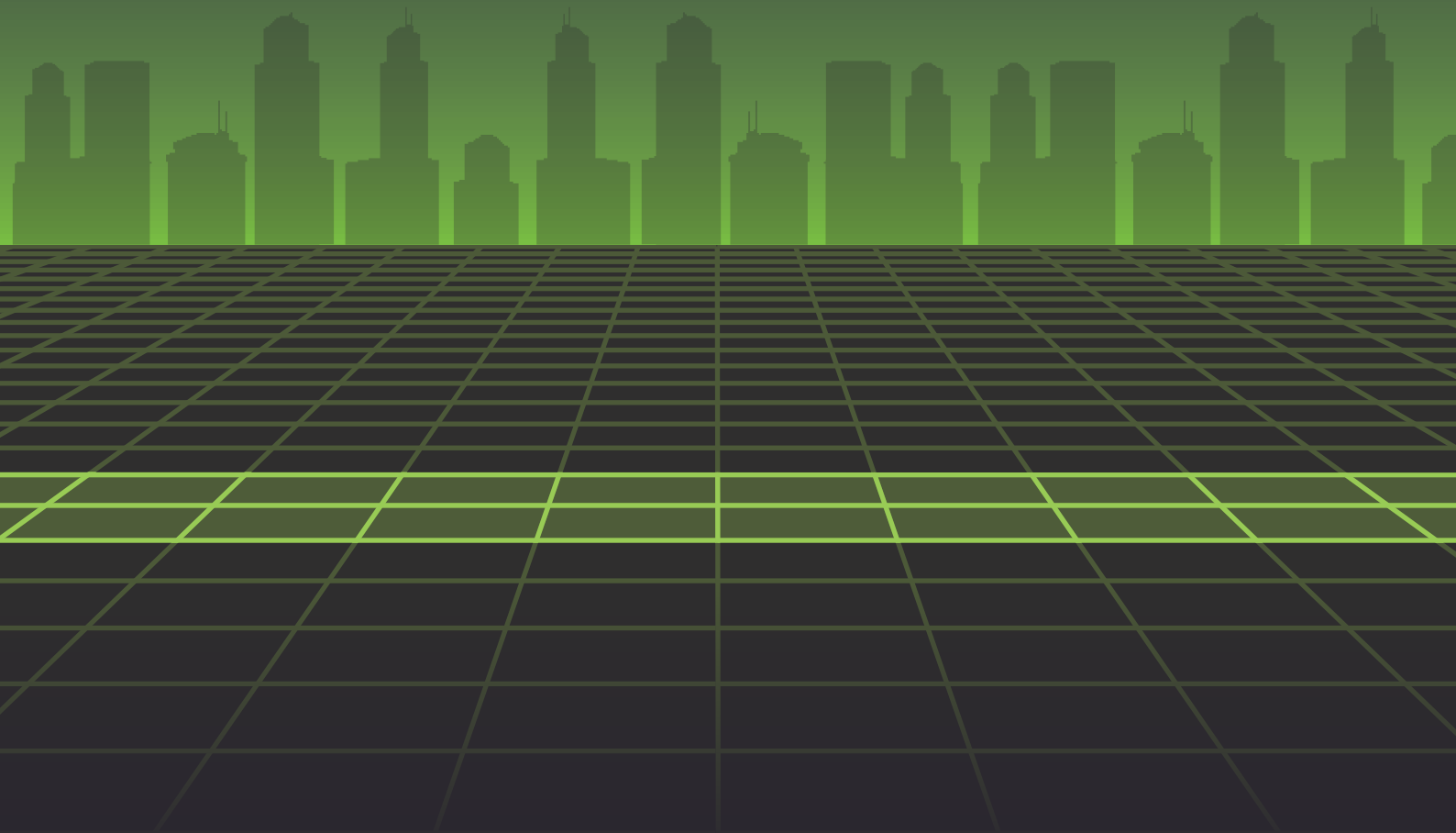
The APAC B2B Buyer Journey Research Report 2025.

Why APAC B2B Buyers are buying faster and earlier (and how AI is influencing the process).

Green
Hat

6sense®

A collaborative research study conducted by Green Hat and 6sense



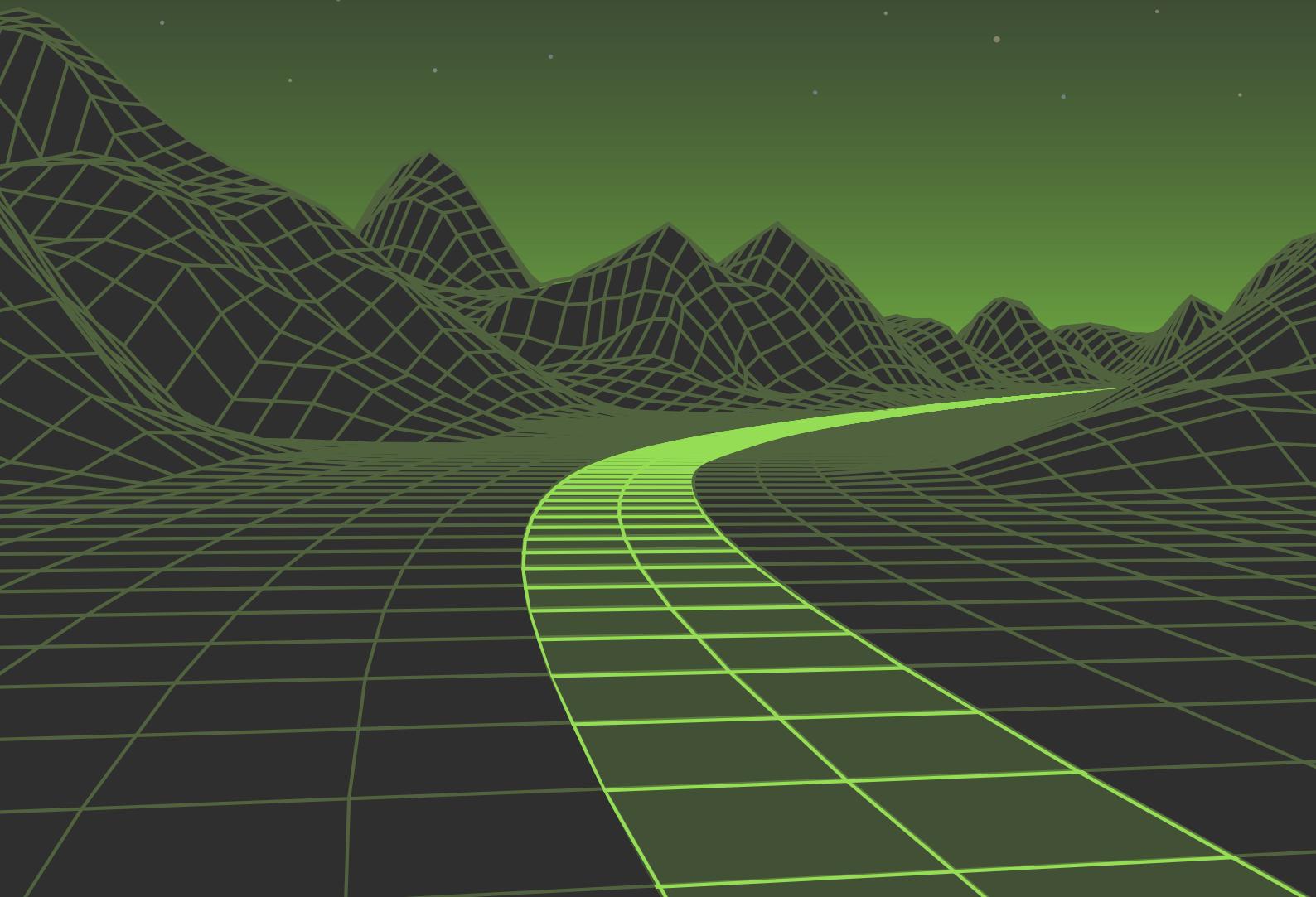


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The big picture.



For nearly two decades, APAC B2B buyers have been delaying engagement with sellers until later in the buying journey. This trend is explained by two main forces.

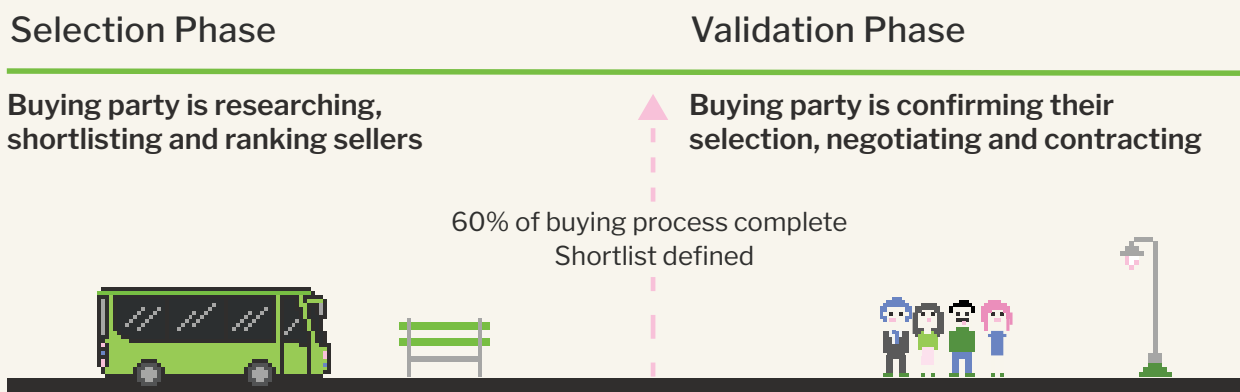
Firstly, there is a proliferation of accessible content that has made buyers increasingly self-sufficient. Secondly, generational change is occurring as Millennials and Gen Zs have entered B2B buying teams. They have decision-making roles with a digital-first mentality and demand a frictionless buying experience.

However, this study completed by 632 APAC B2B organisations finds there is a significant shift in buying team behaviour.

The song remains the same but the rhythm has changed

Across industries, geographies and deal sizes, buyers are singing from the same song book as in previous years. Buying teams continue to follow a two-phase buying journey made up of selection and validation. However, the rhythm (aka timing) is changing.

APAC B2B buying journey phases



The Selection Phase is bound on one side by a research process to find potential vendors who can solve the business problem. On the other side, it is bound by preliminary prioritisation of that shortlist, and the decision to begin engaging with vendors. The ultimate winner comes from the initial shortlist 95% of the time, and the vendor that tops an APAC shortlist at the end of the Selection Phase winds up the ultimate winner 76% of the time.

The Validation Phase begins with initial conversations with sellers and ends when a deal is signed. For most buyers, this phase is not about going through the motions – they have important questions and concerns that must be addressed. Vendors who are not on the list at the start of this phase have little chance of success.

Buyers are reaching out to sellers earlier

We define the Point of First Contact (POFC) as the moment the buyer contacts the seller. In 2024, the POFC in APAC started at 73% of the journey, and buyers engaged vendors only when most requirements were defined, consensus was forming, and a shortlist was set.

This year's study found that the promise of AI and the threat of economic uncertainty is prompting earlier engagement with sellers. The Selection Phase has been compressed to 61% globally and 60% in APAC, being 12 weeks earlier than in the prior year.

This can be attributed to two disruptive factors:

■ “AI Inside” solutions

Globally, 58% of B2B buyers said they pulled sellers in earlier to clarify embedded AI features. This applied across all purchase categories including machinery and services. Vendor websites and content rarely provided enough relevant information, driving the need to engage the seller earlier.

■ Economic uncertainty

Almost half of buyers said tighter budgets and faster budget cycles have shortened buying timelines, leaving less room for a drawn-out Selection Phase.

However, what has not changed is the composition of the buying party, such as decision makers, financial ratifiers and procurement members. In APAC, the average buying team member reports having about 3 to 4 responsibilities in the purchase, regardless of their core role.

Requirements are mostly set prior to engaging sellers (85% of the time) and the top-ranking vendor at the end of the Selection Phase is usually the ultimate winner. This is true in APAC as it is globally.

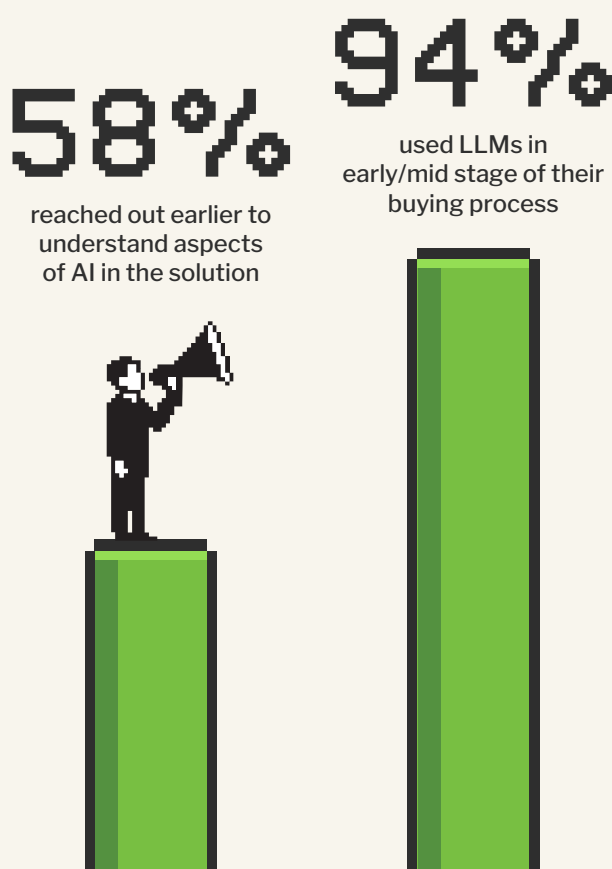
Faster cycles, smaller teams

Fundamentally, the process of B2B buying has not changed, nor has the output of the shortlist decision. In a reversal to a persistent trend, not only is the buying team reaching out earlier, in APAC our research finds that the buying team is smaller and having less vendor interactions than last year.

The average buying journey is now ~11 months (down 2 months) and the buying party is ~11 members (down 2 members).

Our findings suggest AI is driving buyers to turn up at the seller's doorstep earlier to learn more about “AI inside”. However, AI is not significantly changing the buying process itself.

The AI Impact Globally



Key findings.

The 2025 B2B Buying Journey in APAC.

The B2B buying cycle has a start and end but it is rarely a straight line between the two. Here, we map out key 2025 research findings that marketing and sales need to consider when engaging customers and prospects.

START

Project approved.
Goals set.
Buying party assigned.



10.9

▼ DOWN 1.9 PEOPLE

is the average number of people in a buying party

journey length averages

11 months

▼ DOWN 2 MONTHS



CMO Question:

Do you understand the challenges and buyer missions of all members in the buying party?

CMO Question:

Do you actively engage consultants and analysts?

56%

▼ DOWN 21%

of buyers use consultants or analysts to guide their decision making

85%

▲ UP 3%

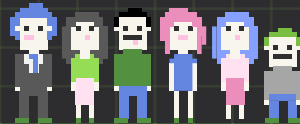
of buying teams have requirements mostly set before engaging vendors

CMO Question:

Does your content support and direct buyers in formulating their requirements?



CMO Question:
Do you have visibility of 'buying signals'
to see who is in their Selection Phase?



in the process, buyers will engage

5.5
vendors

▲ UP 0.5

CMO Question:
Are you making it
easy for buyers to
compare your offering
and understand your
'AI Inside'?

60%

▼ DOWN 13%

through their
journey, buyers
will engage sellers
on their shortlist

16

▼ DOWN 4

interactions per
member per vendor
during the buying
process



CMO Question:
How well does your
message and content
stand out?

76%

▼ DOWN 6%

of the time, the winning
vendor was engaged first
by the buyer



END

Vendor selected.
Terms negotiated.
Project
commences.

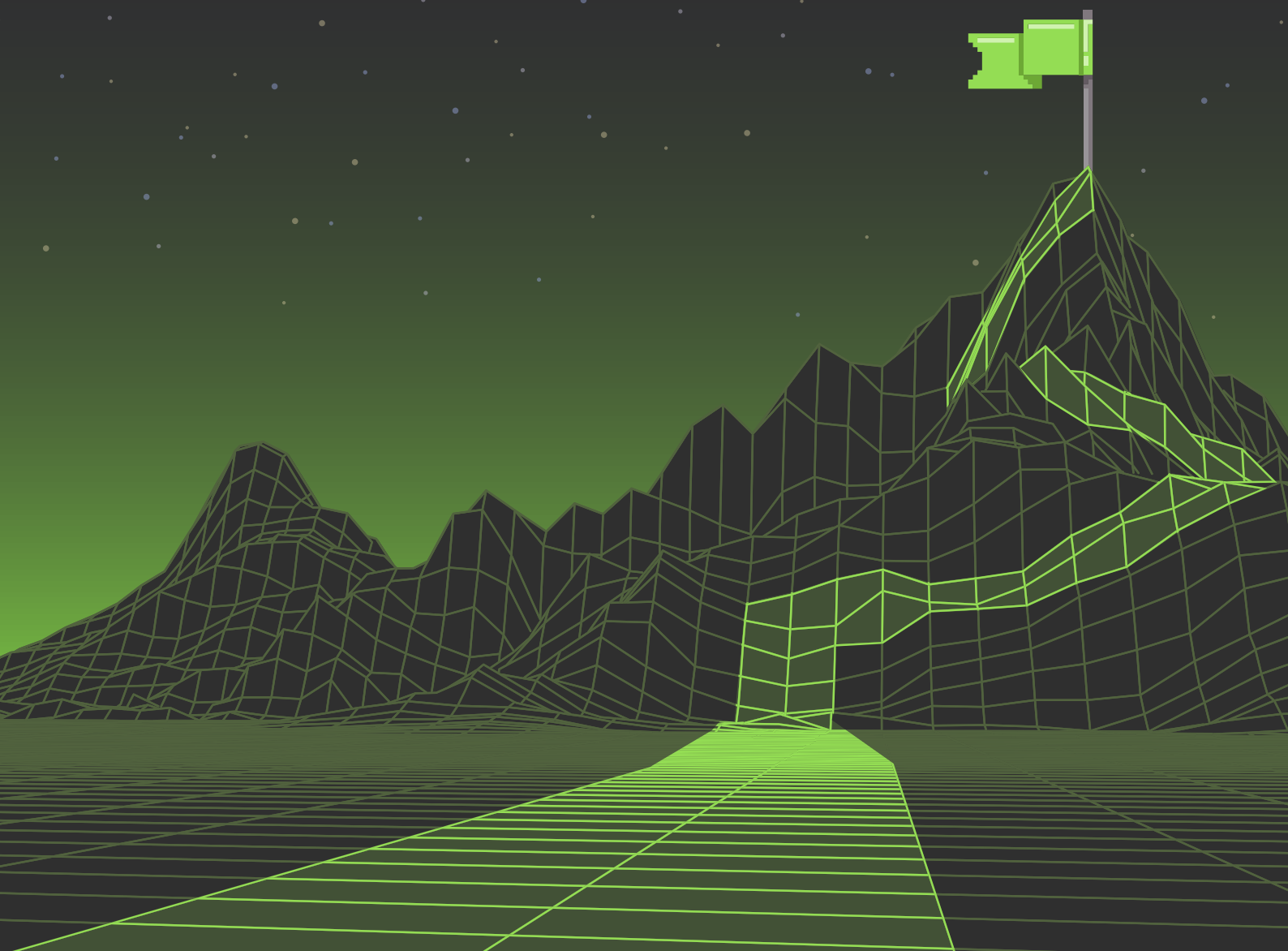
How does APAC compare globally?

	Global (with trend*)	APAC (with trend*)	North America	Continental Europe	UK / Ireland
POFC with Seller (point of first contact)	61% ↓ ~7 weeks sooner*	60% ↓ ~12 weeks sooner*	64%	58%	57%
Buying Group Size	10 people ↓	11 people ↓	10 people	9 people	10 people
Buying Cycle Length	10 mths ↓	11 mths ↓	11 mths	10 mths	8 mths
Number of vendors evaluated	5.1 ↑	5.5 ↑	5	4.5	5
Requirements mostly set prior to seller contact (% of buyers)	83% =	85% ↑	83%	78%	87%
Preferred vendor in Selection Phase is ultimate winner	77% ↓	76% ↓	83%	75%	68%

*Compared with 2024 research findings



Exploring how B2B buyers buy. ■



Exploring how B2B Buyers Buy – APAC in context

This year's report tells us that the buying party and decision-making process is consistent with previous years. In most cases, buyers are still deciding what they want to purchase and from whom before any seller contact is made.

However, there are important differences from prior years:

■ Selection Phase compression

The biggest shift we've seen is when buyers engage with sellers – a trend seen globally in 2025 and more so in APAC where the process has shifted to 11 from 13 months. Compared to last year, buyers in APAC are engaging sellers almost 12 weeks sooner, being at 60% of the way through the journey.

■ Vendor count growth

Outside of the shift to earlier engagement, we're also seeing buyers evaluate more vendors per deal than they did last year. The increase is modest from 5.0 to 5.5 vendors.

■ Buying cycle compression

In previous years, an increase in the number of vendors that were evaluated typically coincided with larger buying groups and longer cycles. In APAC however, whilst buyers are now evaluating on average 10% more vendors, this actually coincides with smaller buying groups and faster purchase timelines – a reversal of last year's pattern of "more vendors = more buying team members + longer cycles."

■ Selection Phase winner takes all

In past years, we have seen that the vendor ranked at the top of the Selection Phase shortlist became the ultimate winner 82% of the time. With the Selection Phase being compressed by 12 weeks in APAC, it was surprising to find that the favourite still wound up the ultimate winner three-quarters of the time.

85%

of buyers set most of their requirements before seller engagement



Top reasons the winners win in APAC

- Vendor reputation/brand
- Product/solution features
- Prior experience with seller
- Price
- Ease of implementation/use

Smaller teams, faster cycles compared to last year but buyers still in control of process

Meet the buying team. They already know you, hopefully!

Typically, all members of the buying team have gone through 8 to 9 purchase journeys in the same product or service category over the course of their career. Much of their experience with the winning vendor comes from prior evaluations.

Given their extensive experience, it's no surprise buyers enter the journey with a clear idea of the vendors they plan to evaluate. They place 72% of the 5.5 vendors on their shortlist on day one of the buying journey. They also report having prior experience with 73% of the vendors on their shortlist. Singapore ranks higher within the context of these two findings compared with Australasia, Hong Kong and Southeast Asia.

When asked the type of prior experience buyers had with the vendor they ultimately chose, APAC buyers overwhelmingly pointed to having previously evaluated that vendor far more than just brand familiarity or past experience at another company.

As evidenced in the graphic on page 16 (The APAC B2B Buyer Experience Reality), clearly buyers are rarely “starting from scratch.”

The importance of prior vendor experience is further validated by research conducted by LinkedIn's B2B Institute¹. The top determinant of vendor selection was “I had previous success with them” and being heavily recommended by customers and colleagues proved to be more than 3X as influential than a product that promised to be better – i.e. have more features, benefits, dimensions.



Buyers on average
have had

8-9

purchase journeys
in the same product
/service category

1. How to be Buyable in B2B: the emotions that unlock a \$19Trillion Category – [linkedin.com/pulse/how-buyable-b2b-emotions-unlock-19tr-category-mimi-turner-1igvf/](https://www.linkedin.com/pulse/how-buyable-b2b-emotions-unlock-19tr-category-mimi-turner-1igvf/)

The APAC B2B buyer experience reality.

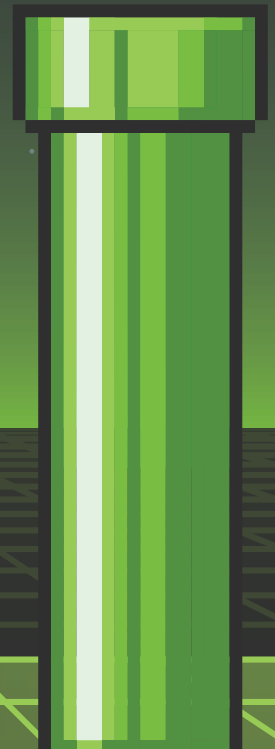
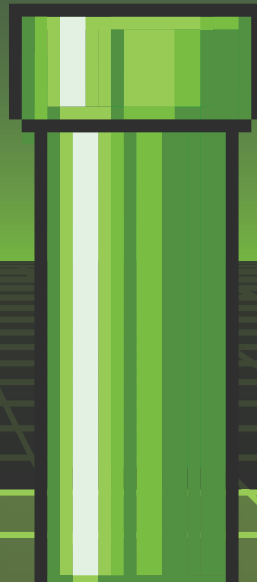
72%
of vendors on the
shortlist was
established on day
1 of process

73%
of vendors on day
1 shortlist had prior
experience with
the buyer

80%
said they personally
knew the seller
at the vendor
organisation

88%
of the time, buyer
had prior experience
with the vendor they
ultimately selected

95%
of the time, the
chosen vendor was
on the short
list from the start



Become buyable to the buying party

Being known to the buying party is a baseline requirement. While the decision-making mechanics have not changed – research, selection, shortlisting, validation – we are gaining better insight into how the buying party is making decisions.

The B2B Institute defines buyability² as the “social, emotional and functional jobs to be done that give buyers the confidence to buy”. In other words, making it easy for a buying party to say yes. This is not about persuading individuals but rather about enabling a group consensus, while making it easy for groups to defend their choice. They must be able to defend their decision, which may be no decision. The B2B Institute team, led by Mimi Turner and Jann Martin Schwartz, eloquently refer to this behaviour as FOMU (fear-of-messing-up) as opposed to FOMO (fear-of-missing-out)!

The B2B buying group is made up of two cohorts, who both need to see the vendor as buyable:

1. ‘Solution buyers’

Members focused on finding vendors who have a solution that addresses the business problem. This is a rational and functional analysis with defined selection criteria and checklists. This cohort includes business analysts, solution architects and technical specialists.

2. ‘Reputational buyers’

Members focused on mitigating risk and who leave the solution analysis to the solution buyers. We refer to this group as hidden buyers as they are less likely to interact with the vendor during the process. Their decision-making is more emotionally-driven as they consider vendor reputation, sustainability and referenceability. This cohort includes CFO/financial leaders, compliance/risk managers and c-suite executives.

‘Buyability’

the sum of emotions that make up “Confidence to Buy”

‘Procurophobia’³

occurs when B2B buyers stall a buying decision due to fear, uncertainty or perceived risk

2. B2B marketers need to show how their runs are scored, Aug 2025, marketingweek.com/mimi-turner-buyability

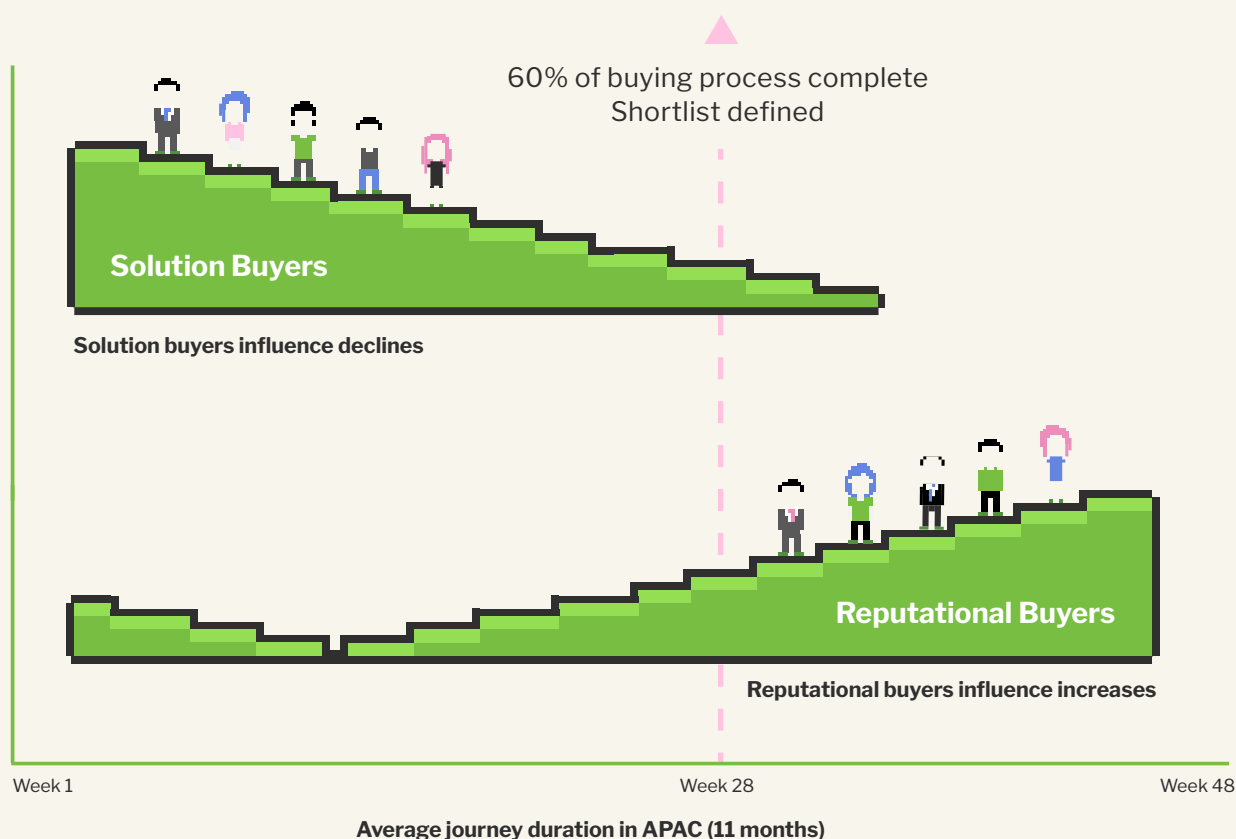
3. Green Hat, Aug 2025, green-hat.com.au/glossary/procurophobia

Our research reported that there are solution and reputational buyers in APAC who are open to switching vendors even after agreeing on a preferred option. While 76% of buyers reach out to their preferred vendor first and ultimately purchase from them, roughly a quarter end up going with a different vendor than their first choice.

Buyer group influence in B2B buying journey

Selection Phase

Validation Phase



The digital natives are here

We also report that the average age of the APAC B2B buying party is 38-44 years old, with financial ratifiers being at the older end. Forrester, in its B2B buyers journey survey⁴, reveals that 72% of buying teams are Millennials and Gen Zs (born after 1980). Furthermore, a staggering 93% of these buyers say they are dissatisfied with the traditional buying cycle. You can do the maths!

Their digital-native tendencies amplify both self-directed research and demand for transparent, frictionless information. They have significantly less interactions with sellers than 51+ year olds. Gated content that often leads to persistent sales pursuit tactics and long discovery calls no longer work with this group (or any buying team member for that matter).

Interestingly, there was no significant difference in use of LLMs across age groups. The older generation buyers have embraced AI-based research to the same degree as the younger cohort.

4. Younger Generations Are Shaking Up B2B Buying In APAC – Are You Prepared? – Forrester, Sept 2024, forrester.com/blogs/younger-generations-are-shaking-up-b2b-buying-in-apac-are-you-prepared/

B2B buying behaviour by APAC sub-regions

Buying Behaviour	Australia / New Zealand	Hong Kong	Singapore	Southeast Asia
Percent of shortlist placed from day one of journey.	72%	70%	80%	69%
Winner is on day one shortlist x% of time.	94%	92%	98%	96%
Winner is vendor buyer has had prior experience with x% of time.	86%	87%	91%	88%
Average number of journeys buyers have been through in that product category.	8.5	8.2	9.0	8.3

Precision-targeting is needed to engage a rep-resistant buying party

Savvy B2B marketers who know how to engage the whole buying party know they need to adopt an account-based marketing/experience (ABM/X) model. However, our recent research on CMO Marketing and AI Priorities in APAC⁵ reported that only 55% of APAC organisations had adopted ABM compared with 77% in the US.

In APAC, ABM efforts are generally funded by re-allocating, not increasing, current marketing budgets. Given that our study reported that nearly 60% of marketers are operating with flat or declining budgets, many CMOs should consider realigning their marketing funds to engage the 11-person buying party with more precision during their Selection Phase.

5. CMO B2B Marketing and AI Priorities – Green Hat/6sense, July 2025, green-hat.com.au/thinking/b2b-priorities-report

How AI is impacting the buying process.



Why buyers are reaching out earlier

Our study highlights the category experience of B2B buyers – however AI is exposing a critical knowledge gap.

AI is prompting buyers to engage earlier in their process

Buyers have had the tools, experience, and confidence to conduct the bulk of their evaluations independently for many years. So, what's the impetus to step into vendor conversations earlier?

Based on our qualitative observations and conversations with B2B leaders, three plausible factors emerged:

- AI as a buying process tool – noting a decline in web traffic on B2B vendor websites, there is a hypothesis that buyers may be using AI Large Language Models (LLMs) to research vendors and create shortlists
- The need to evaluate AI inside solutions – not just GenAI's use in the buying process, but how AI is being embedded into B2B products and services
- Persistent macroeconomic uncertainty – driving some organisations to move faster, either to secure budget before it disappears or to respond to shifting business conditions.

Are buyers substituting external engagement with LLM use?

Well, sort of.

Almost all (93%) of APAC B2B buyers report using AI to support their buying process – in line with global adoption (94%). They rank AI between “important” and “very important” and, on average, buyers report using AI for ~3 different buying use cases, also matching global patterns. Most AI use in APAC occurs at the beginning and middle stages of the journey.

Two interesting APAC findings over the last 12 months are:

- Use of consultants and analysts dropped 21% over the last 12 months from 77% to 56%. We expect the use of LLMs has contributed to this
- The number of buyer/seller interactions per person, per vendor has gone down (from 20 to 16). However, this is likely due to the compression of the buying journey, wherein APAC buyers are working within smaller teams across shorter cycles – not because of AI

Most buyers expect AI to augment (50%) or replace (29%) outside resources like consultants and analysts in the future.

The impact of ‘AI inside’ on the B2B solution

Is the presence of AI in B2B solutions impacting the buying process?

To test the hypothesis that it leads to earlier buyer engagement, we conducted some secondary research globally.

The majority of B2B buyers expect (83%) and require (63%) the solutions they evaluate to have an AI component.

	Purchase included	Expected (Significant or moderate functionality)	Required (Mandated or strongly encouraged)	Not expected	Not wanted
Hardware	84%	75%	60%	14%	9%
Equipment / Machinery	67%	55%	46%	23%	6%
Services	92%	87%	63%	3%	2%
Software	93%	88%	67%	4%	2%
Total	89%	83%	63%	7%	4%

These expectations and requirements vary by solution type. In particular, software buyers had the highest expectations and those buying equipment and machinery were less likely to expect or require AI.

It is not surprising that buyers needed clarification on a variety of issues with respect to AI, but buyer concerns started with the very basic question of what capabilities are included and how much, if anything, it would cost. In fact, most buyers (81%) expect they are going to receive the AI functionality at no additional charge.

Nearly half of buyers also needed clarification on how models were trained, how data would be stored, and what privacy and security issues the AI capabilities introduced.

AI Solution Transparency

What does the buyer want to know about AI in your solution?



Capability



Data
privacy



Data
security



Pricing



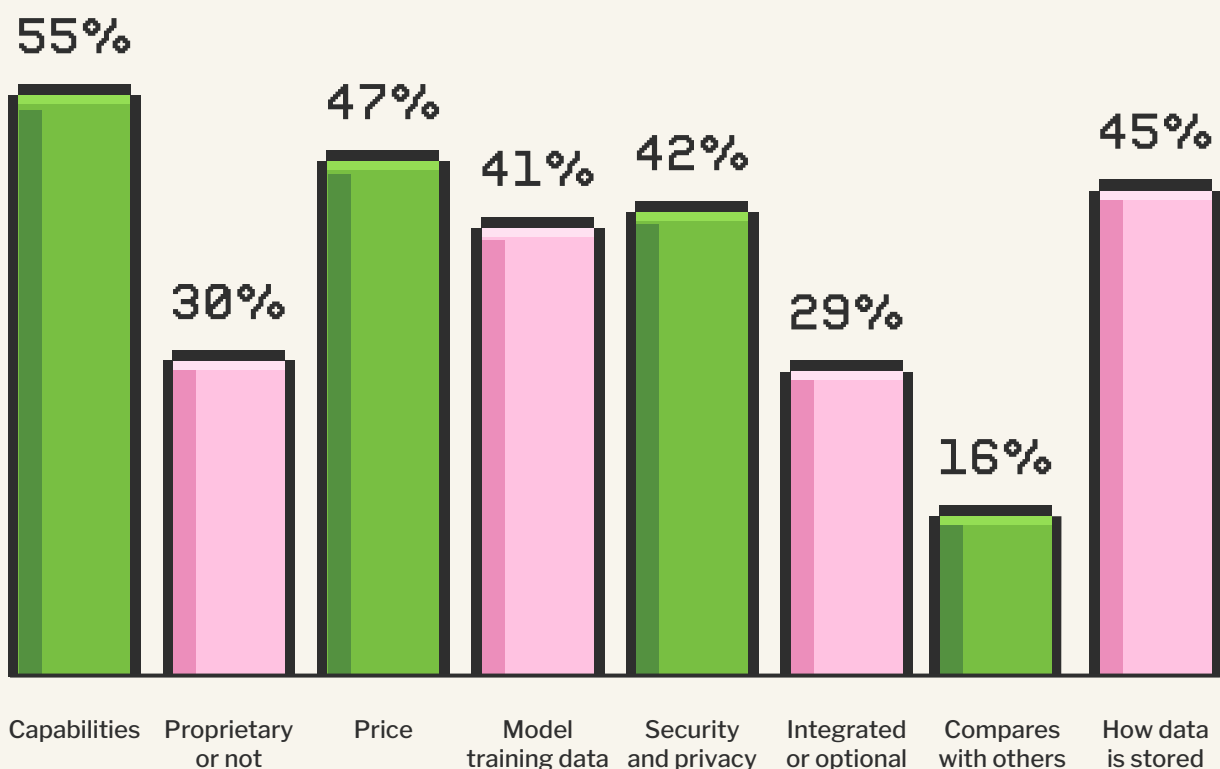
Training

What information is needed to clarify 'AI inside'?

Nearly 58% of buyers reported that they engaged with vendor representatives earlier than they would have otherwise in order to address the above information requirements. This uncertainty triggered the reversal of the two-decade trend toward greater buyer independence, and it reflects the fact that prior product /service category experience of the buyer offers little guidance in evaluating AI's impact on capabilities, particularly with respect to pricing, implementation, and security.

Compounding the issue, most vendor websites do not yet provide the clarity buyers seek on these topics – leaving direct engagement as the only viable path for buyers.

Percentage of buyers needing clarification on AI topics



It's not just AI uncertainty, it's economic uncertainty

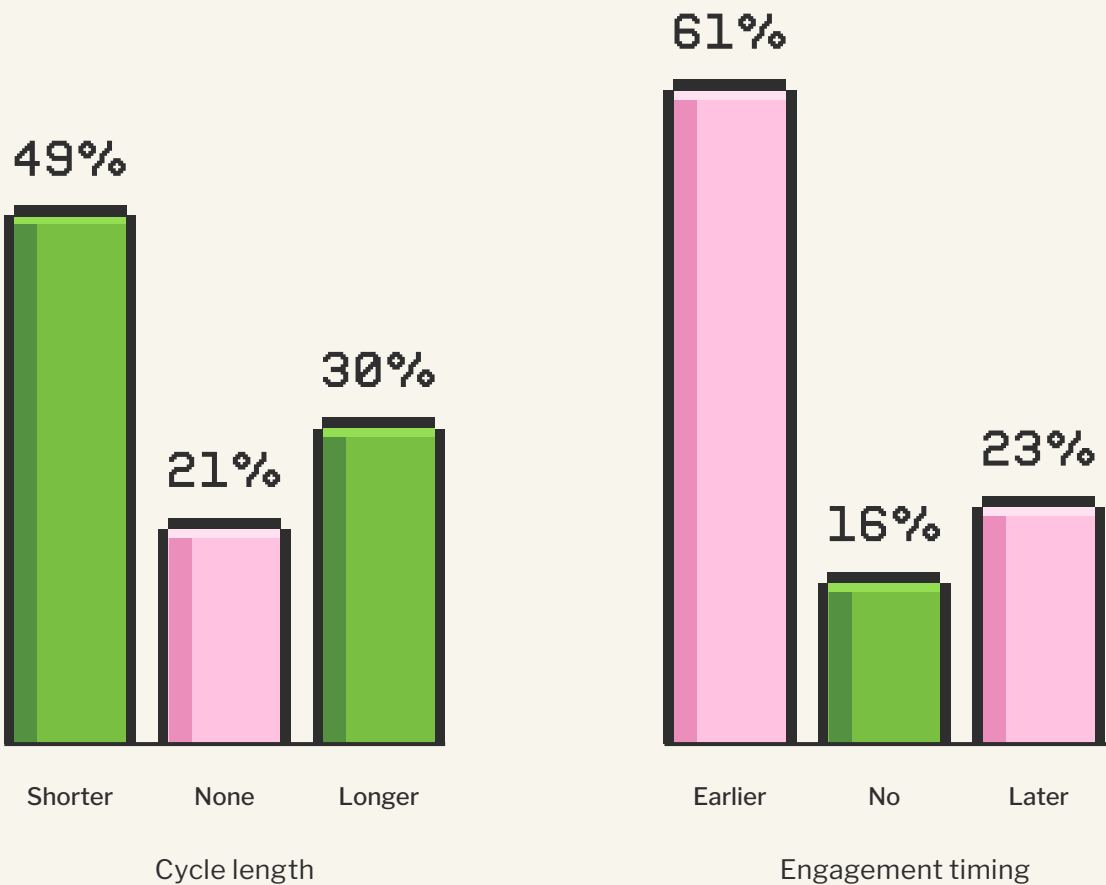
Not only is AI uncertainty driving buyers to reach-out earlier to sellers, nearly half of buyers (49%) said that economic uncertainty had led to shorter buying cycles and earlier engagement.

Organisations with approved budgets may have been eager to spend budgeted funds quickly, before potential pullbacks due to tariffs, cost-cutting, or other macroeconomic risks.

Not only were cycles compressed, but 61% of buyers said that they engaged with sellers earlier due to economic uncertainty, again accelerating the buying process.

These findings report that large-scale external forces can bend long-standing patterns in B2B buying. This also suggests that rather than a permanent realignment, changes may prove to be situational adjustments – though still adjustments that every revenue team must now recognise and adapt to.

Macro economic impact on buying cycles and timing



Where to from here?



Implications for CMOs

The playing field for B2B marketers is clearly changing. The balance of power is with buying teams. Old demand-gen strategies with MQL metric models based on an individual buyer will not succeed in this new era of B2B buying that is increasingly orchestrated by digital-native buyers.

Here we provide four recommendations to strategically and tactically address these buying changes:

1. Win your place in the Selection Phase shortlist

- Treat the Selection Phase as the real battleground – 76% of the time the preferred Selection Phase vendor wins
- Invest in search and discoverability – GEO, AEO, SEO, including comparison pages, and third-party validations
- Build brand-building assets and defensibility coverage at point-of-first-contact. Your sellers need content that helps the buying party reinforce and defend their preference for you
- Rebalance spend towards brand from demand. Our recent CMO Priority Research⁶ finds that brand building ranks #1 in importance yet demand generation is still getting more budget

2. Drive ABM to engage the whole buying party

- Know the whole buying party for your target accounts that matter
- Shift success metrics from MQLs to whole buying group engagement
- Build persona-based content for reputational buyers as well as solution buyers e.g. ROI calculators, security one-pagers, compliance checklists

3. Publish Selection Phase content including an AI-Inside Transparency Kit

- Publish thought-leadership personalised for personas and industries
- Provide AI clarity in your MOFU/BOFU content as buyers seek to understand the 'AI inside' your solution
- Provide sellers with ready-to-go assets and playbooks so that they can address the five AI informational needs of buyers – capability, data privacy, data security, pricing and training

4. Transform measurement model away from MQL /clicks to four journey stage measures

- Share of search and large language model – as a proxy for brand strength
- Buying party engagement
- Marketing Qualified Accounts (MQAs) – leverage 1/2/3rd party intent signals
- Pipeline uplift – opportunities and wins

6. APAC B2B Marketing & AI Priorities Research Report – Green Hat / 6sense, August 2025 green-hat.com.au/thinking/b2b-priorities-report



Finally, ask yourself...

Does my C-suite understand how B2B buyers have changed the way they buy? Do they know that purchase decisions are made by large buying teams and that these teams spend nearly two-thirds of the process researching and building their shortlist before they speak to Sales?

B2B marketing is under pressure. Digital natives are commandeering buying decisions. Traditional short-term MQL-focused approaches are failing to work in this new world of B2B buying.

The C-suite needs to be taken on an enlightenment journey so they can support the transformation to a winning engagement model – one that addresses the two phases of buying. A journey that will put the focus on buying teams and will transform internal alignment, resourcing and budget modelling. From there, Marketing takes the lead in winning the shortlist battleground and opening the gates for your Sales troops.

Methodology

This research was conducted through a quantitative survey of 632 B2B business and procurement professionals across the Asia-Pacific (APAC) region in June and July 2025. Respondents represented a wide range of industries, company sizes, and functions, ensuring a balanced view of buying practices in the region. Respondents had to have made a B2B purchase of minimum US\$25K over the past 24 months.

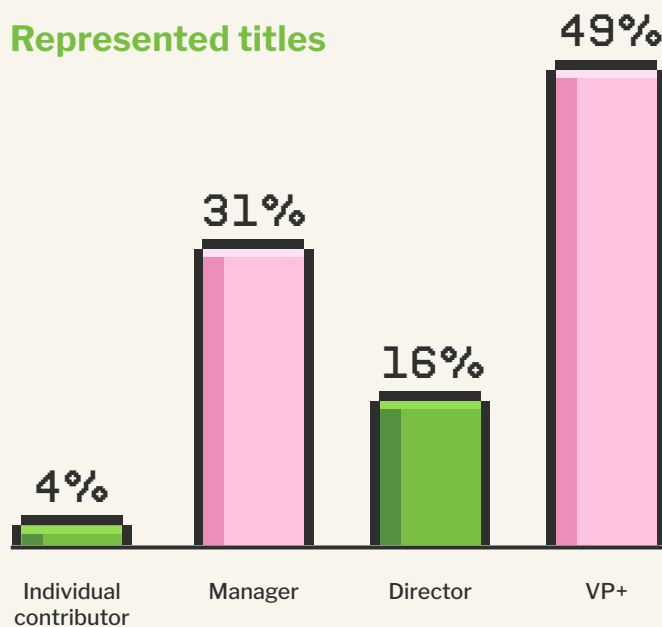
Company sizes represented (US\$)

- Up to \$100M: 30%
- \$100M - \$999M: 41%
- \$1B and over: 29%

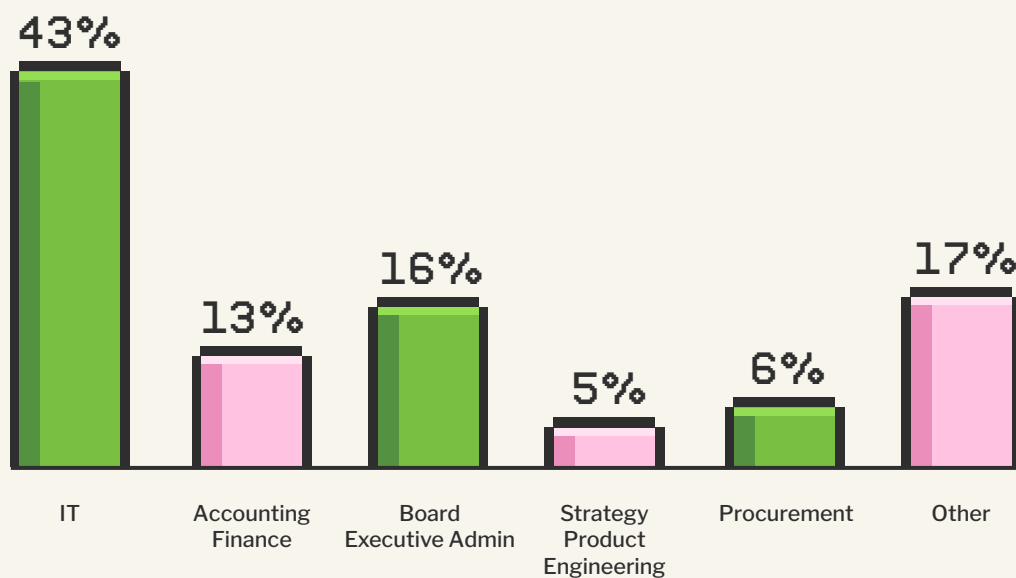
APAC Respondent Counts

APAC Country	Respondents
Australia	160
Hong Kong	102
Malaysia	101
New Zealand	56
Philippines	114
Singapore	99
Total	632

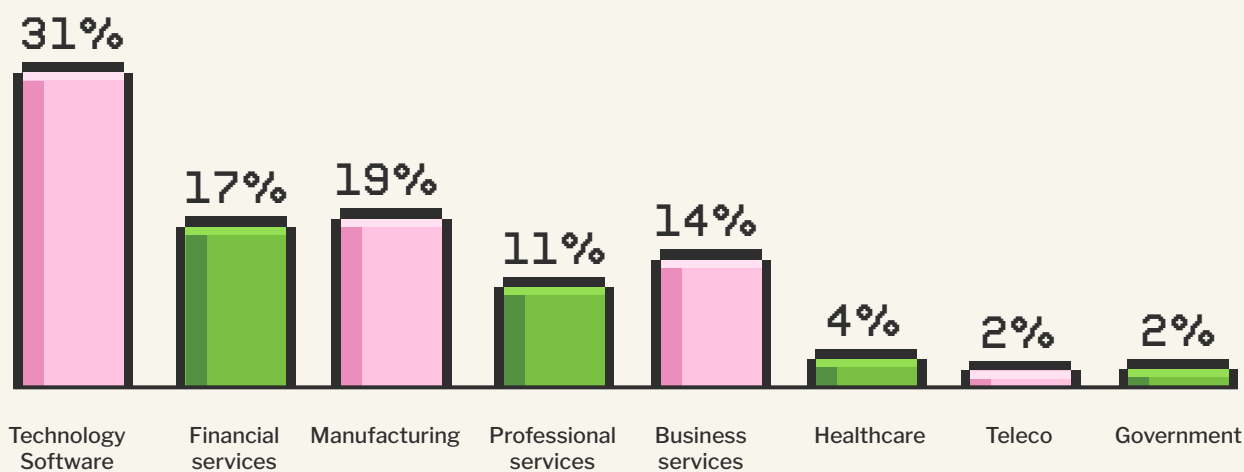
Represented titles



Department of participant



Represented industries



The research team.



Sara Boostani

Research Analyst, 6sense

Sara is a lead research analyst for this report and passionate about all things B2B marketing. Together with Kerry, she has published various research reports such as the B2B Identification Benchmark, the Account-based Marketing Benchmark and the State of BDR.

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Andrew is the co-founder and CEO of Green Hat. He is a co-author of the B2B Marketing Outlook Report, has developed the 7-Step B2B Strategy Framework and is a regular speaker on the conference circuit. He's passionate about marketing and sales alignment to deliver measurable outcomes.

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About Green Hat

We're a full-service B2B marketing consulting agency, one of the largest in APAC and located in Melbourne, Sydney and Singapore. With over two decades of experience behind us, we know how B2B buyers are changing the way they buy. Our work starts with rethinking strategy and transforming how our clients go to market with their positioning, brand, digital, content and creative activated through ABM and demand-gen programs ... and trusted by some of the world's most famous B2B brands.

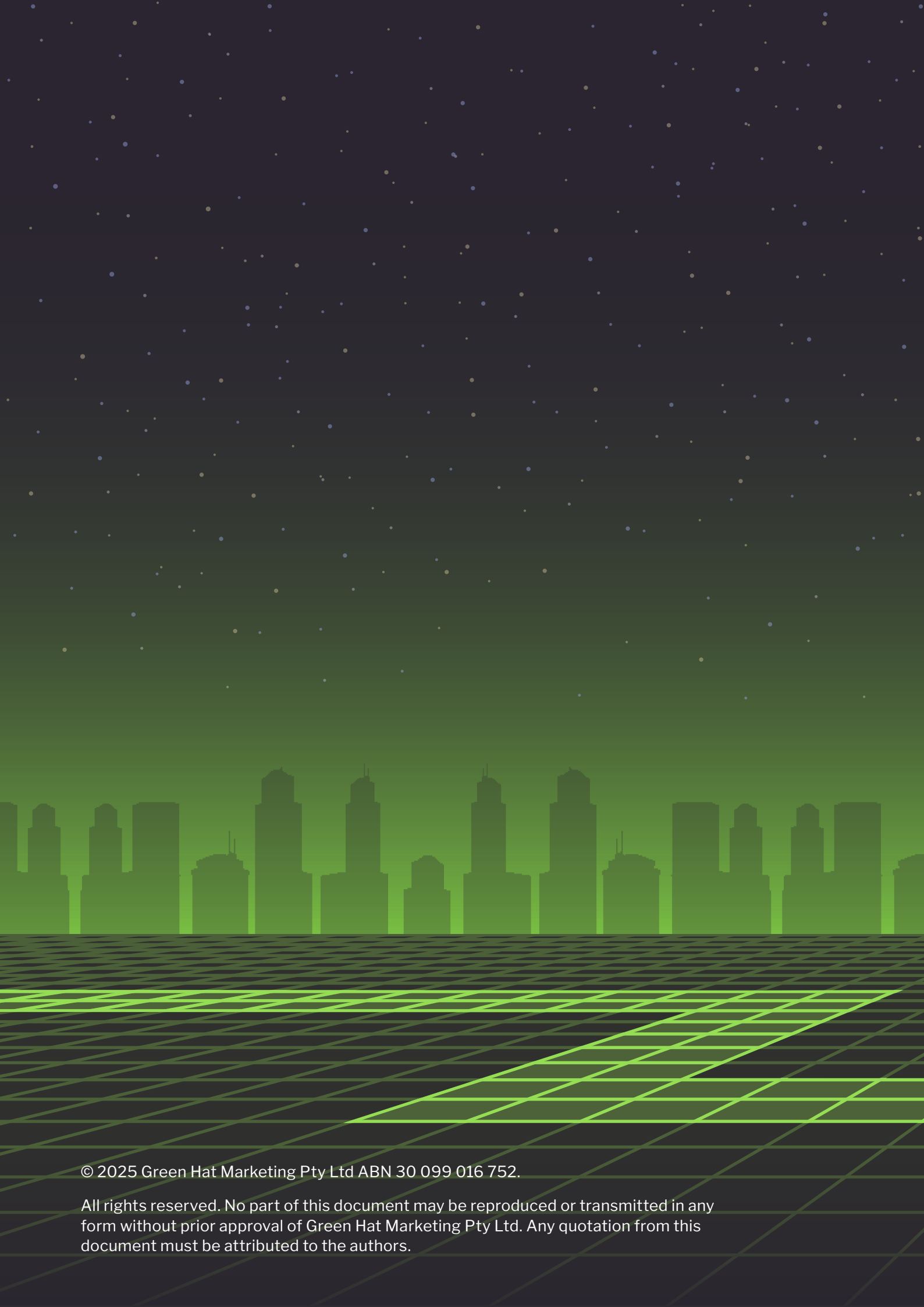
green-hat.com.au



About 6sense

6sense is on a mission to revolutionise the way B2B organisations create revenue by predicting customers most likely to buy and recommending the best course of action to engage anonymous buying teams. 6sense is the only sales and marketing platform to unlock the ability to create, manage, and convert high-quality pipeline to revenue.

6sense.com



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