



Under Pressure

APAC B2B Marketers in 2025-26

Why budgets, AI, and ABM priorities aren't lining up- and what marketers must do next.

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Executive Summary

What You Need To Know.

**B2B marketing principles have not changed
but everything else has, starting with the
way buyers buy.**



If 2025 has a challenge for B2B marketers, it's this: do more with the same. Or less.

APAC marketers are under pressure to hit bigger pipeline goals with flat or shrinking budgets. 59% of these marketers have the same or less budget and more than half are putting budget into demand gen over brand. Worryingly, just **37% believe their current budget will get them there** – yet most aren't doubling down on the areas that will truly make a difference.

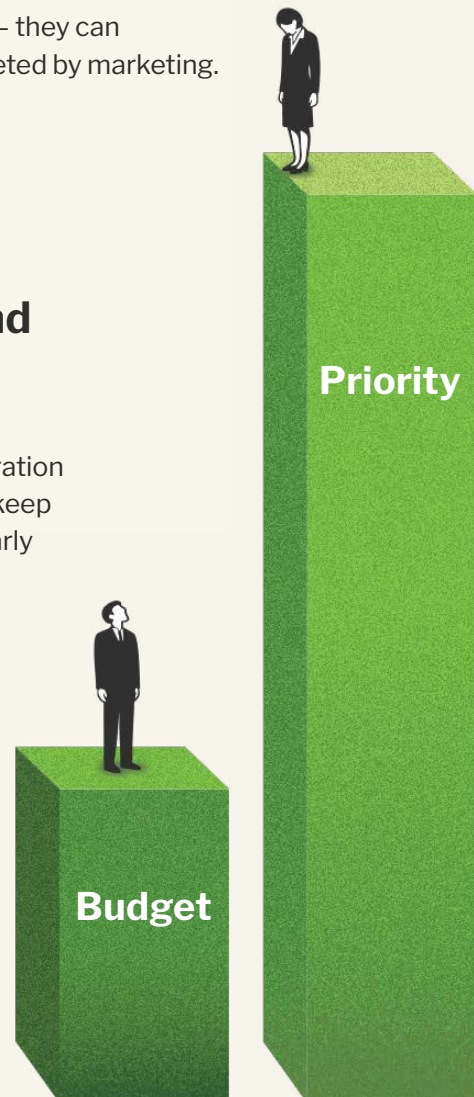
This Green Hat & 6sense study of 155 APAC B2B marketers reveals a profession in tension – with investment areas not lining up with what marketers say they value most.

The report unpacks where APAC marketers are investing but also where they're not. And it does so through the lens of our APAC B2B Buyer Journey Research Report, which tells us:

- The **average buying group comprises 12.8 people** who will only reach out to vendors **73% through a 13 month buying journey**.
- **82% choose the first vendor they engage with.**
- More than **half of the buying group are 'hidden' buyers** – they can influence or veto decisions but often aren't directly targeted by marketing.

The disconnect between priority and budget allocation is real:

- **Brand priority vs. budget share**
Brand building ranks #1 in importance yet demand generation is still getting more budget (and increasing faster). Why keep favouring short-term performance when brand drives early preference and long-term growth?
- **AI confidence vs. budget commitment**
80% of marketers are confident in AI having a positive impact on marketing goals – but only 29% have carved out budget for it. If AI has potential to unlock efficiency and scale, why isn't it being funded more deliberately?
- **ABM maturity gap**
55% of APAC marketers run ABM programs vs. 77% in the US. Why is a region so focused on growth lagging behind on the most fundamental form of account-centric marketing?



What does this mean for marketers?

Marketers are between a rock and a hard place. Tight budgets, rising revenue targets clash with long buying cycles, and self-directed buyers who only reach out late in the buying cycle. In the face of this pressure, marketers report defaulting to activities that drive short term gains at the cost of longer-term goals.

Success in 2025–26 will come down to a marketer's ability to:

- **Align budget allocations with long buying cycles:** Even though content, brand and ABM are seen as strategic, many teams still over-index on short-term tactics such as lead gen – often because they're easier to measure against a backdrop of increase pipeline demands – even if they don't reflect how B2B decisions are made.
- **Build a brand that's front of mind with buyers:** From our research, nearly everyone in the buying group knew the winning vendor's brand before engaging them. Brand equity and mental availability are what get you shortlisted especially when 82% of buyers engage their preferred vendor first. Brand also plays a key role in overcoming buyer indecision.
- **Get more out of Account-Based Marketing (ABM):** You're influencing a buying group of 13, many of whom you'll never meet. ABM, not demand gen, is the only model that matches how B2B buying decisions are really made.
- **Make AI the new competitive edge:** It's not just about which tools you use. It's how you create more content, optimise campaigns faster, get richer insights, and work at a pace your competitors can't match. When budgets are tight, AI can be your efficiency engine.

This report highlights how you can get more out of your 2025-26 budgets by aligning investments with areas that will drive results. We recommend you read this report alongside the [APAC B2B Buyer Journey Research Report](#) that unpacks how B2B buying teams are operating in this region.



Part A

Marketing Budget Priorities.

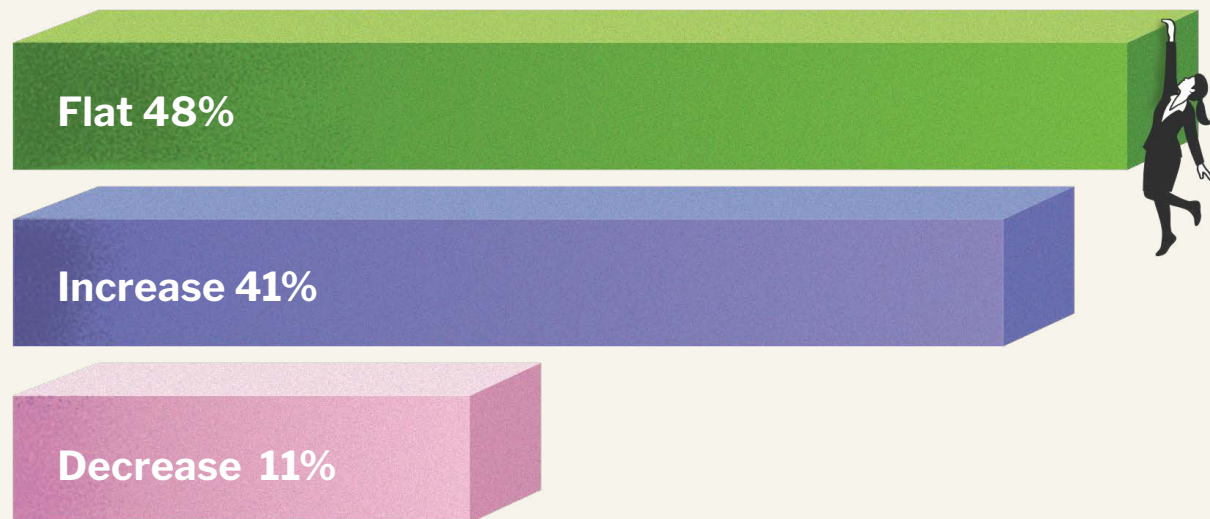
**The illusion of stability: a story
of rising revenue goals,
reallocation and misalignment.**



i. Budget stability with pockets of growth

Despite global economic headwinds, most APAC B2B marketers expect budget stability or modest growth in 2025.

Most marketers expect budgets to hold steady or modestly grow in 2025



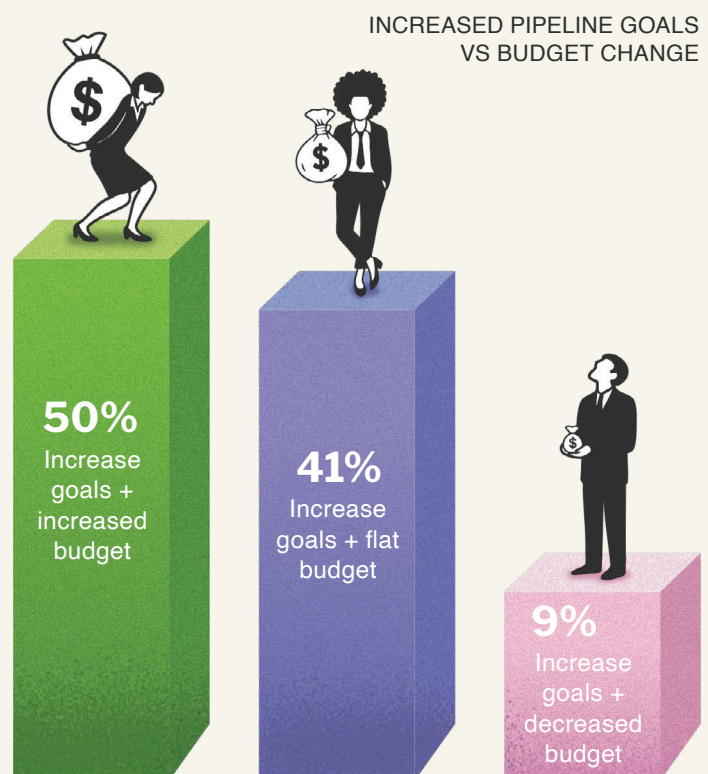
For those lucky enough to receive budget increases, they grew by 14% on average. For those who had decreased budgets, they dropped by an average of 23%.

However, only 37% believe their 2025 budget will be sufficient to meet performance goals – leaving 63% either unsure or pessimistic.

ii. Revenue goals vs budget reality

Many marketers are chasing bigger pipeline goals without budget growth

Takeaway: Nearly half of B2B marketers are being asked to deliver more with the same or fewer resources. Efficiency, automation, and precision targeting will be critical.



ii. Investment trends by marketing activity

We asked marketers how they plan to distribute their budget during 2025. Activities seeing the highest net increase in investment (total respondents increasing less total respondents decreasing) include:



Content marketing



Digital marketing



Demand generation / creation



ABM/X



Customer marketing

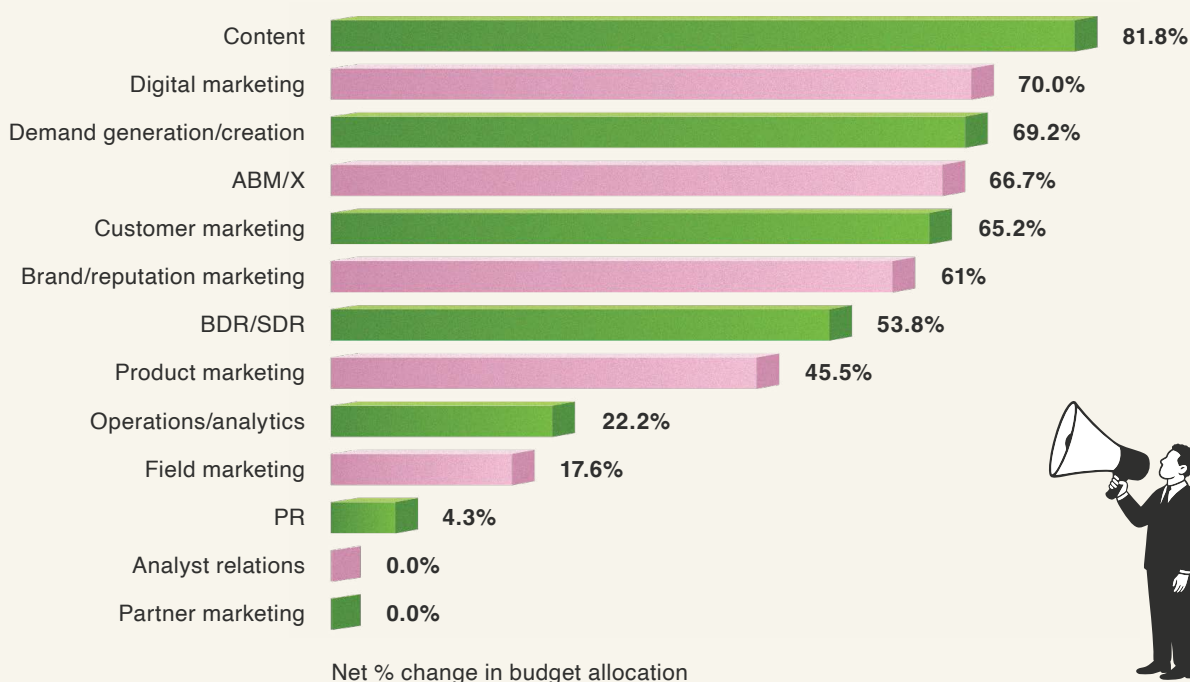


Brand

Despite nearly half of APAC marketers operating with flat overall budgets, the vast majority are shifting investment toward performance-driven areas (e.g., demand generation). Interestingly, those who received budget increases are also choosing to invest in these same areas.

Marketers are actively changing their channel/activity mix

INVESTMENT TRENDS



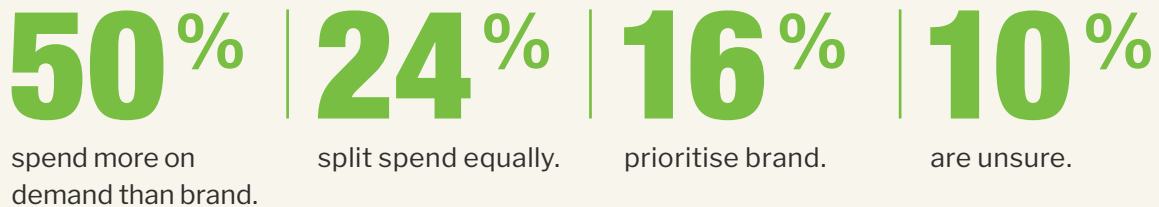
Takeaway: Marketers, regardless of whether they received a budget increase or not, are doubling down on what drives performance and revenue.

iii. Brand vs demand: is the balance right?

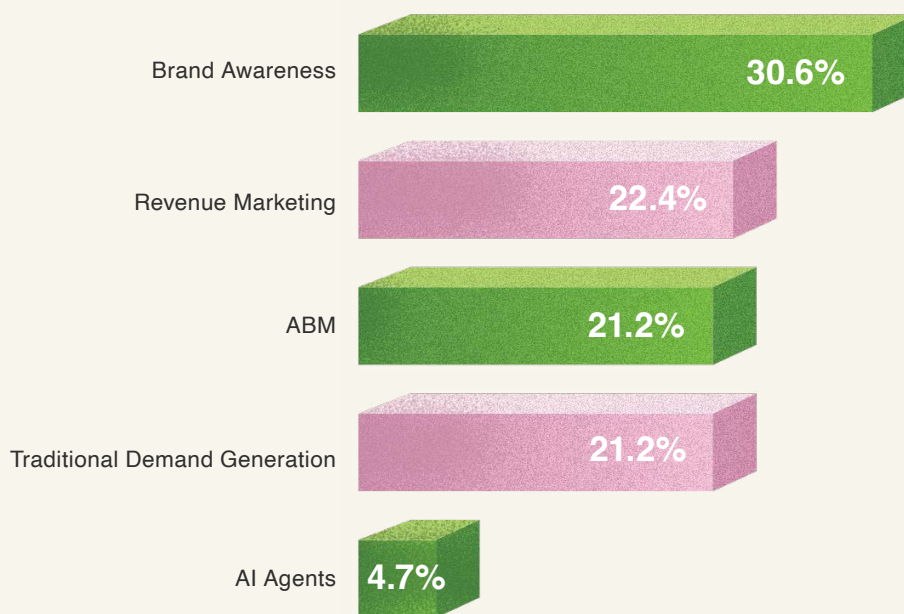
So here lies the disconnect – despite budgets being channelled towards demand generation and revenue marketing:

Marketers rank brand as #1 in terms of importance.

But actions speak louder than words. Consider the below:



Brand awareness ranks as the most important focus for success in APAC



Takeaway: Even though brand is acknowledged by marketers as the top priority, budgets are prioritising performance-led activities, at the cost of long-term growth.



iv. ABM adoption: room for growth

More than half of APAC marketers have adopted ABM but significant room for growth remains. While ABM has crossed into mainstream awareness, many marketers are still in early-stage adoption or trying to scale.

Reallocation trends suggest some marketers are using budgets to build ABM capabilities incrementally rather than securing additive funding:

55%

of APAC marketers report having a formal ABM program (vs. 77% in the US).

45%

remain without ABM in place.

**Budget
reallocation**

not expansion – is funding most ABM development.



Takeaway: APAC marketers are trailing US counterparts in ABM. Against the backdrop of increased pipeline pressures, ABM programs are an effective, efficient way to target and progress high-value accounts.

Part B

AI in the Budget Mix.

Is confidence in AI all talk, little action?



i. State of AI budgeting

AI is starting to feature in APAC marketing strategies – but actual investment is lagging behind confidence and intent.

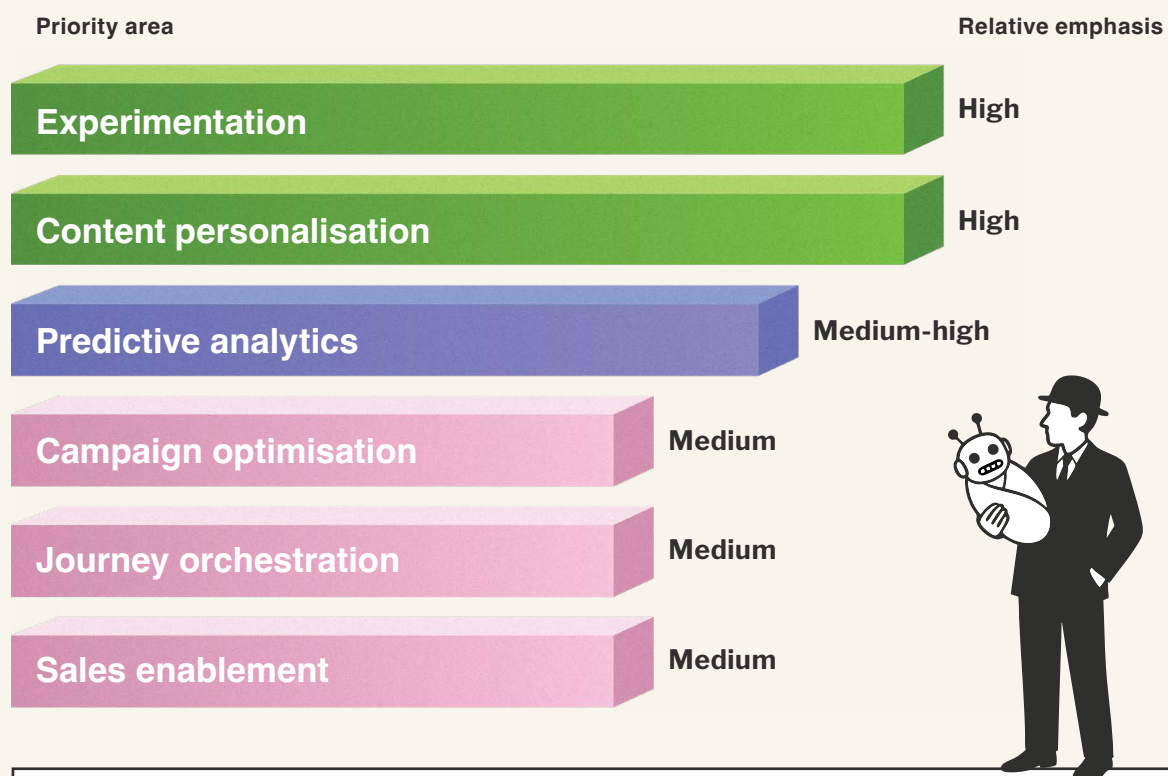
Only 29% of APAC marketers have a dedicated budget for AI in 2025 – well below the 52% reported in the US. Among those investing:

- 50% are using net-new funds
- 50% are reallocating from existing budget

This signals that while AI is on the radar and being employed in some fashion, it's not yet seen as business-critical – more experimental than foundational. But with 59% of marketers operating with flat or less budget, and 63% lacking confidence in achieving their goals, AI could (and should) be a lever for efficiency, not just testing.

Early AI investments are spread across functions

AI ADOPTION PRIORITIES



Takeaway: APAC marketers need to bridge the gap between AI confidence and investment into AI and have a clear roadmap for its use cases. Move from experimentation to deployment.

ii. Confidence in AI contribution

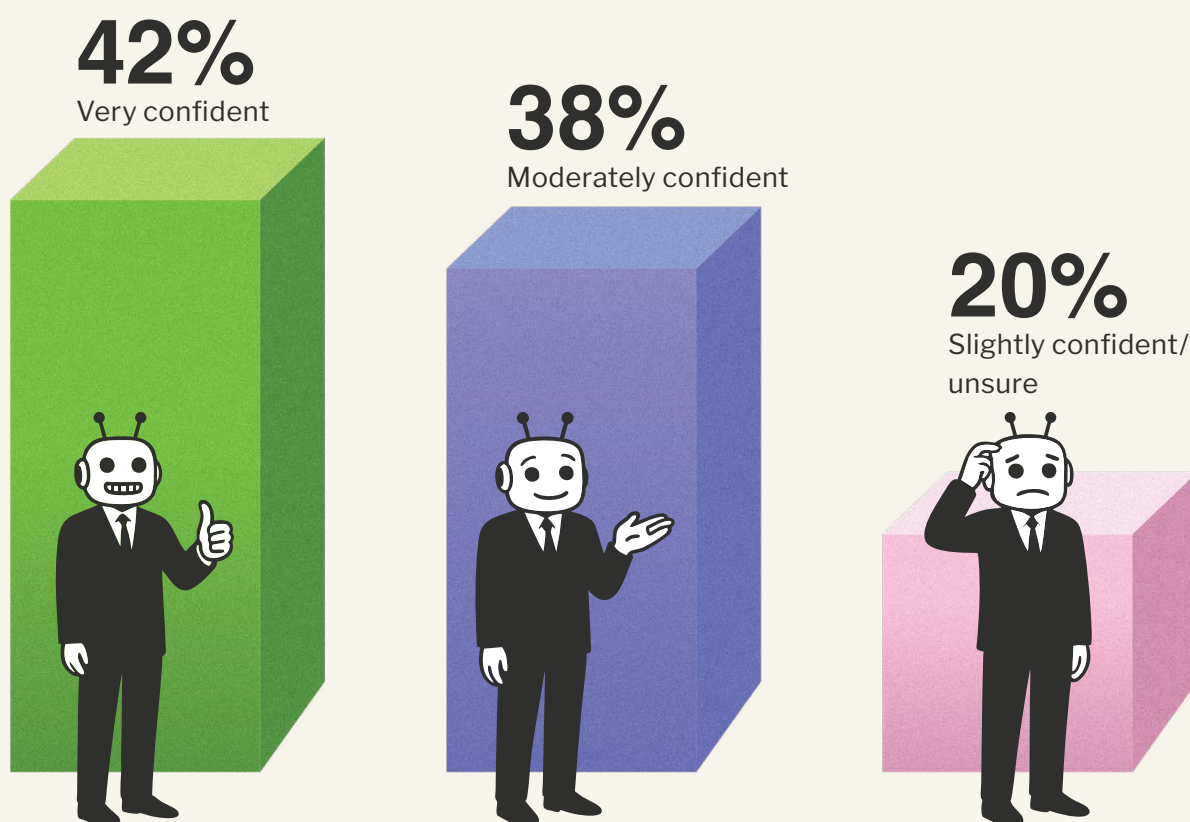
Despite limited budget allocation, belief in AI's value is growing quickly.

80% of APAC marketers express confidence (moderate to very) in AI's ability to help achieve marketing goals.

42% are very confident AI will help hit marketing goals.

Marketers growing more confident in AI helping achieve goals

CONFIDENCE IN AI CONTRIBUTION



Takeaway: On the surface, confidence in AI seems strong. However, only 29% have a dedicated budget for AI. There is a disconnect – if most marketers believe AI will move the needle, why aren't they backing it with budget?

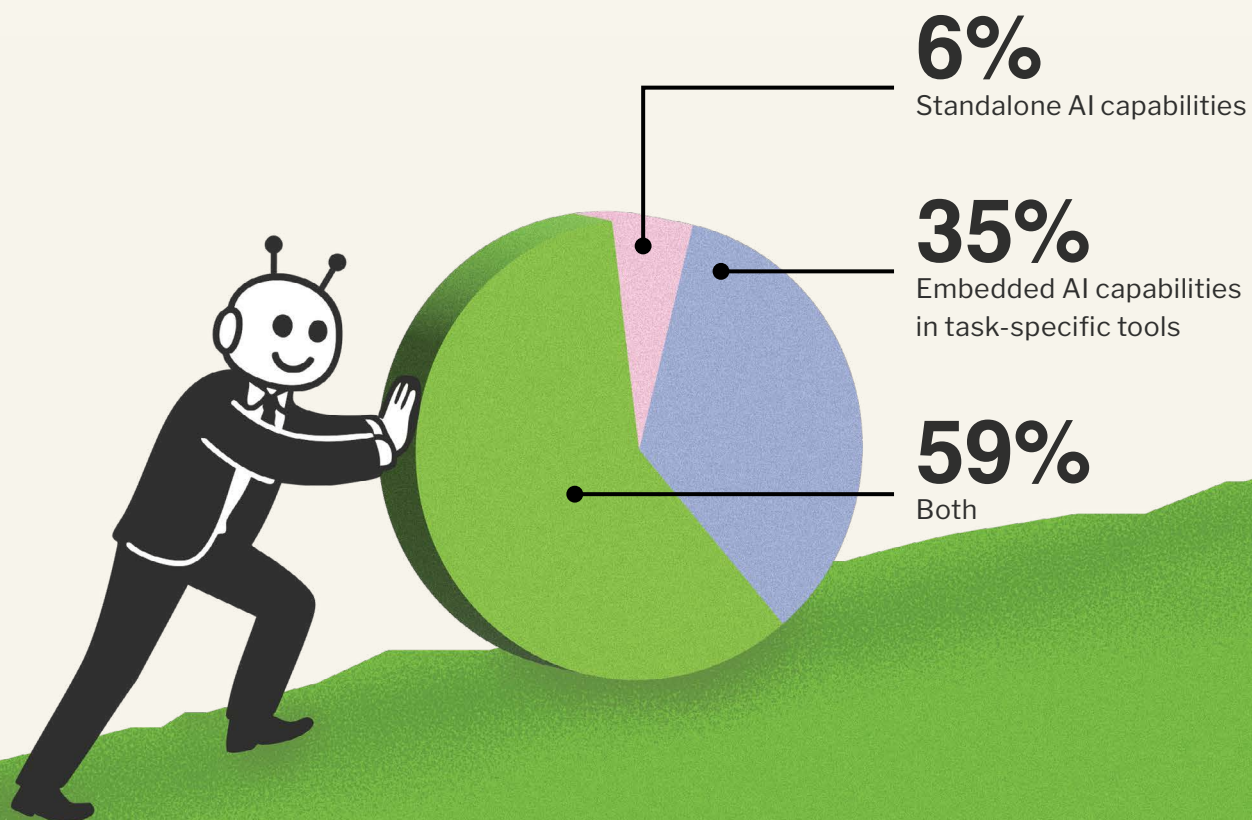
iii. Martech selection and embedded AI

Even in the absence of dedicated AI budgets, buyers are shifting their evaluation criteria to favour platforms with embedded AI capabilities.

This is a pragmatic move. AI isn't just about deploying new tools, it can also be upgrading what you already use. Some marketing teams are acquiring AI by stealth: through CRM upgrades, content platforms, campaign tools and analytics engines that now come AI-enhanced by default.

Marketers favour embedded AI alongside standalone tools

WHERE MARKETERS ARE INVESTING IN AI



Takeaway: Vendors are AI-ing everything. That doesn't mean buyers are adopting strategically. APAC marketers need to be more deliberate. Ask not just "does this tool have AI?" but "how does this help me reduce cost, improve performance, or move faster?"

iv. Expected AI impact (12–24 months)

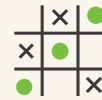
Marketers see AI touching every major function in the near term, particularly:



Content creation



Campaign optimisation



Journey orchestration



Budget allocation decisions

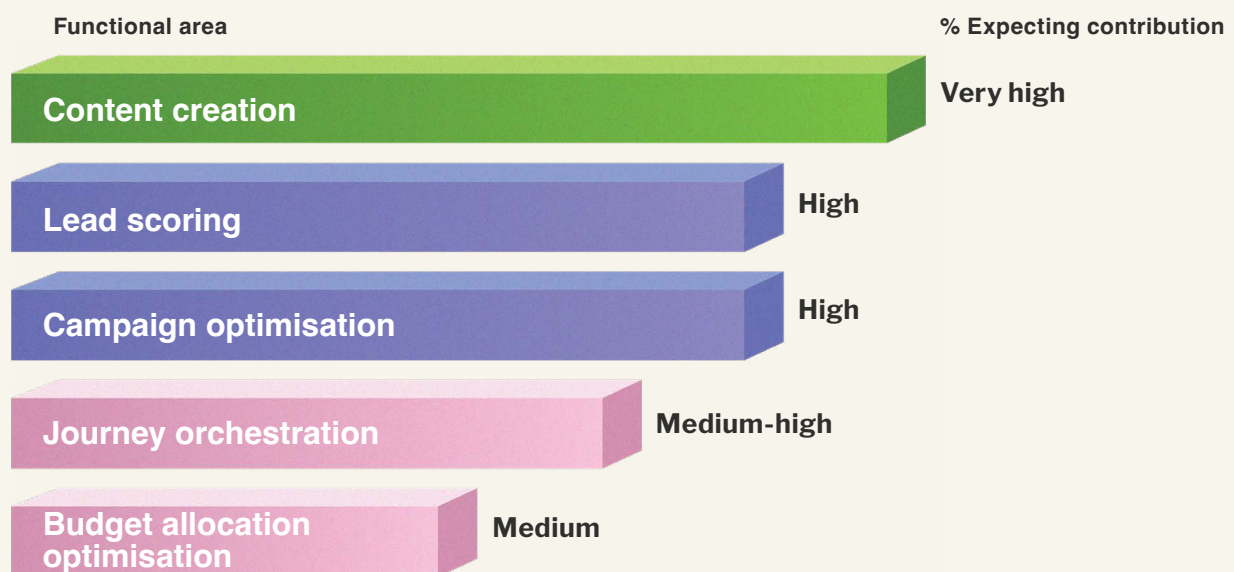


Lead scoring and predictive analytics

Are marketers building the operational frameworks to support that impact? Strategy, training, and governance need to be implemented alongside aspiration and implementation.

AI expected to touch every major marketing function

WHERE AI WILL CONTRIBUTE (NEXT 12–24 MONTHS)



Takeaway: Marketers need to have a clear view about operationalising AI alongside culture, people and data readiness to activate them. If AI is going to span the full funnel, then training, experimentation, documentation and accountability need to follow. The end goal would be to quickly operationalise AI across functions after isolated pilots.

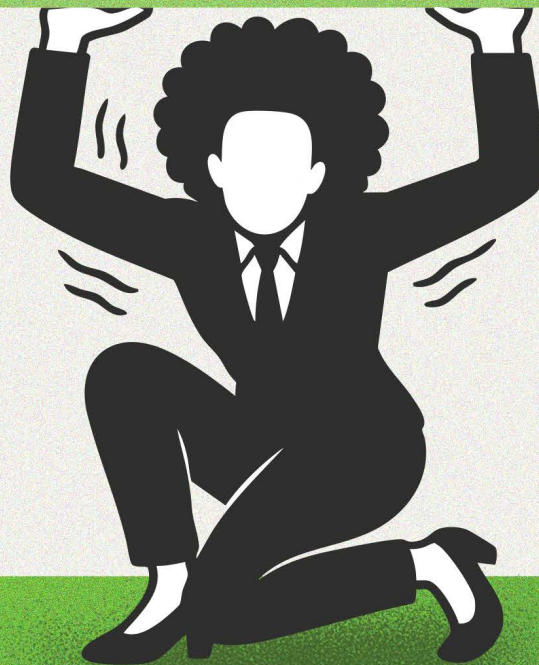
Part C

Actionable Moves for B2B Marketers.

**Turn words into action.
Make your move today.**



APAC marketers are caught in a tightening squeeze – rising pipeline goals, constrained resources, and technological disruption. But amidst the pressure, there is opportunity.

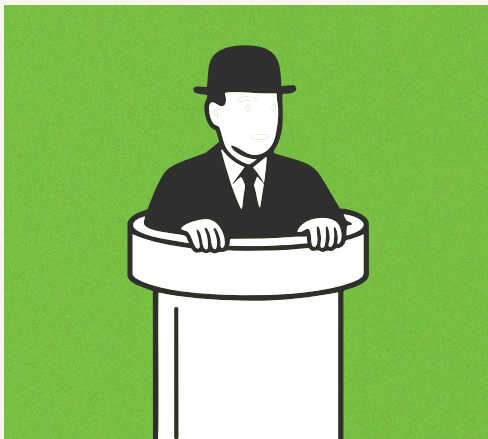


Based on the findings, here are 8 key actions B2B marketers should consider in 2025 into 2026:



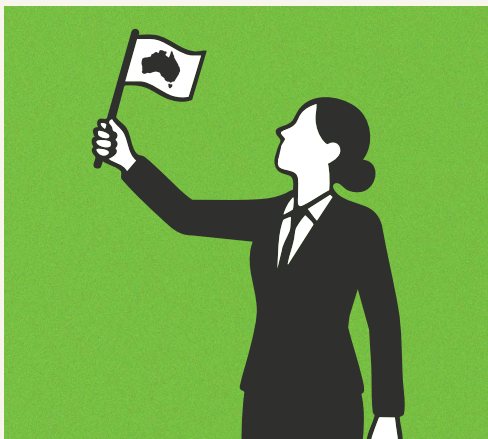
Reallocate budgets strategically

Don't wait for new budget – most marketers won't get one. Instead, reassign existing spend to deliver early and sustained pipeline: content marketing and demand generation shouldn't stop. But also start mapping out for longer-term projects such as ABM that will deliver consistent pipeline aligned to the way B2B buyers buy.



Prioritise brand for long-term pipeline

Brand is ranked as the #1 success driver – yet demand still dominates spend. In a buying journey where 82% of buyers choose the first vendor they contact, brand is how you become the first call. Integrate brand-building into revenue marketing frameworks. This could be apportioning budget into your activities for brand – and setting up ways to track and measure that impact.



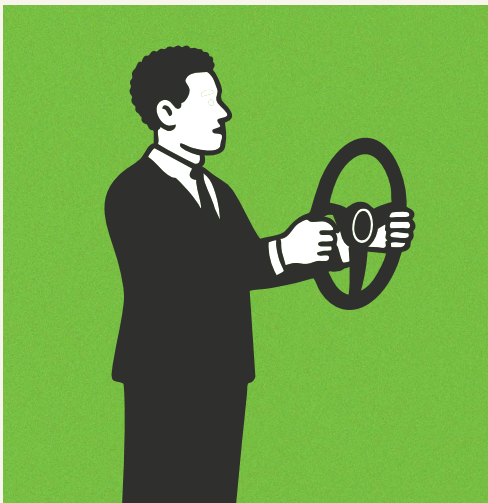
Brand still needs local relevance

In APAC, brand is often managed globally – but buyer priorities are regional and local. Marketers must push for localisation of brand messaging and assets to reflect local economic climates, buyer needs, and language nuance, etc.



Tracking and measuring brand investment

An age-old problem is attributing ROI to brand investment. Why invest in brand when you need to run demand-gen activities to fill your pipeline? Marketers can solve the attribution issue several ways. For example, correlating share of search and uplift in intent against brand activity, using tools that can accurately measure buyer engagement, and building an attribution model that accurately connects engagement with marketing pipeline and revenue.



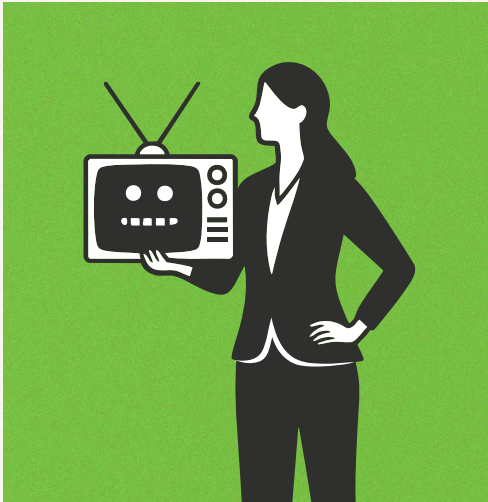
ABM is a competitive driver

With 45% of APAC marketers not running ABM, those who do are gaining a clear advantage – because ABM aligns directly with how modern B2B buying happens. ABM focuses on priority target accounts and on influencing entire buying groups. It also blends brand and demand, supports account-level precision, and builds alignment between marketing and sales.



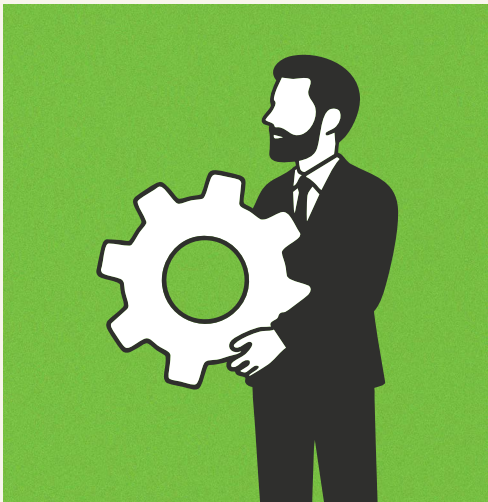
Pilot AI where the impact is clear ... and move quickly

AI innovation is moving at a pace where marketers will not be able to “wait and see” before committing. Given that 59% of marketers have flat or less budget, AI can be where you find efficiencies and competitive advantage. Focus AI usage on content personalisation, lead scoring, and campaign optimisation – where ROI is most immediate. Treat AI like a growth driver, not a side project. Move as quickly as AI is innovating and evolving.



Embed AI into technology and vendor decisions

Favour martech vendors that include robust AI capabilities – it's a cost-effective way to adopt AI without new line items. Also, work with partners (e.g., consultants, agencies) that have AI as part of their stack and strategic approach.



GEO is the new SEO

Generative Engine Optimisation (GEO) is the practice of optimising content for AI-driven search engines like ChatGPT. As more B2B decision-makers rely on LLMs to inform their buying shortlists and decision-making, GEO-optimised, structured content becomes crucial. Your brand must show up – not just in search, but also where buyers are now looking – popular LLMs such as ChatGPT, Gemini, Claude, Perplexity etc.

2025 will test the resilience and resourcefulness of B2B marketing leaders across APAC.

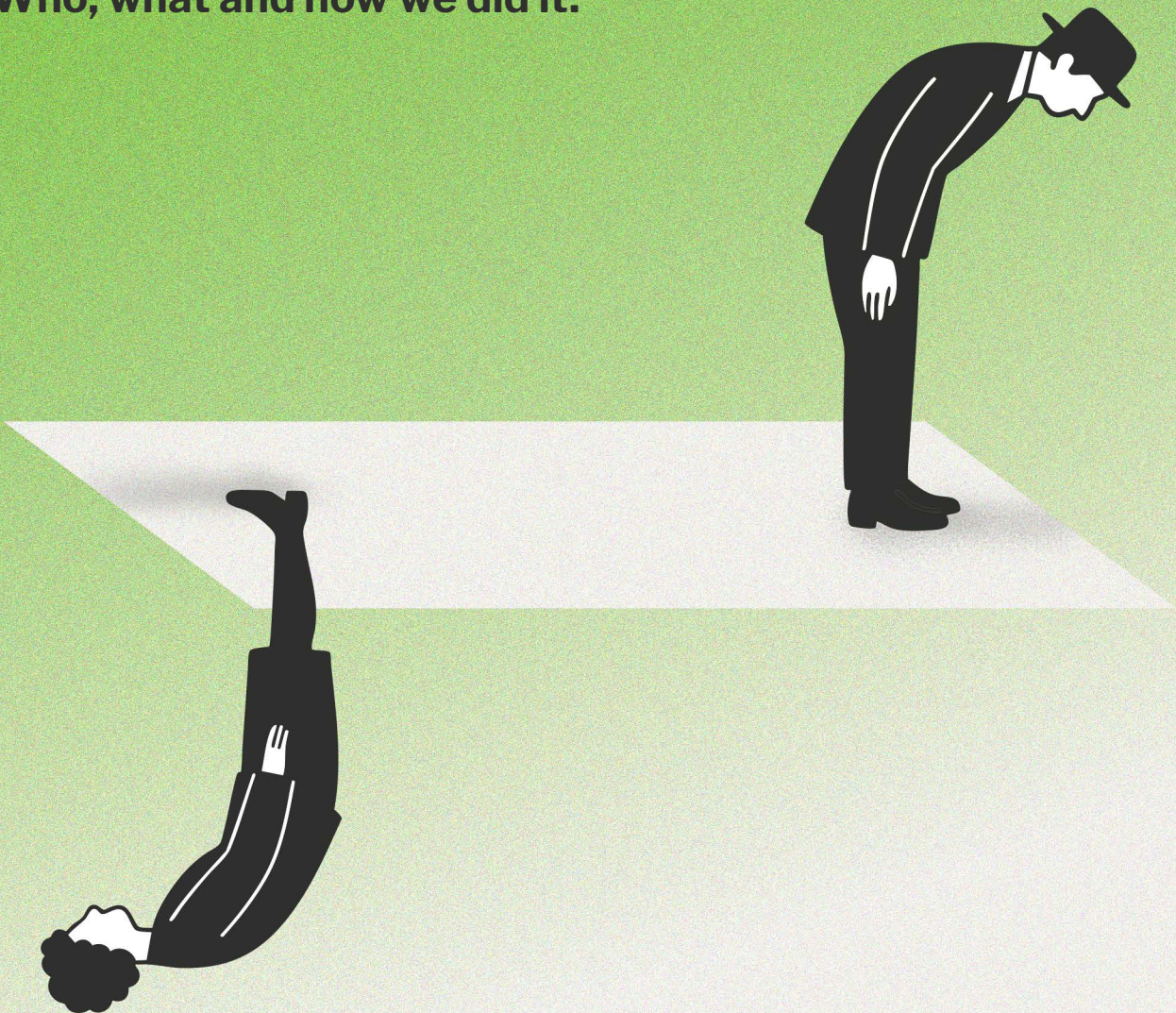
While budgets remain tight or flat for many, expectations for revenue contribution continue to rise – forcing marketers to make smarter, faster, and more focused investment decisions.

In this context, the most successful marketing teams in 2025 going into 2026 won't be the ones with the biggest budgets – but those that can balance short-term results with long-term growth, reallocate decisively into programs that can provide competitive advantage (e.g., ABM), and operationalise innovation (including AI) without waiting for perfect conditions.

Part D

Research Methodology.

Who, what and how we did it.



This research study was conducted by Green Hat, APAC's leading B2B marketing consulting agency, in conjunction with 6sense Research.

A total of 155 senior B2B marketing professionals responded via an online quantitative survey during April–May 2025.

Roles Represented

CMOs, Marketing Directors, Heads of Demand Generation, Brand Managers, Marketing Operations Leads, and others

Primary Industries Covered

Technology, Financial Services, Professional Services, Manufacturing, SaaS/Cloud

Company Size

- Small (under 200 employees): 23%
- Mid (200–1000 employees): 42%
- Large (1000+ employees): 35%

Geography

Companies primarily headquartered across Australia, Singapore, India, Japan, and broader APAC

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