

ADAPT OR DIE

IN 2026, AI WILL TRIGGER A SYSTEMATIC SHIFT IN
MARKETING – Redefining roles, tasks and realities for good

AI TO BOLSTER CUSTOMER CENTRICITY

The insights you'll find in these pages reveal a clear and compelling narrative: optimism in the Middle East is rooted in the confidence of CMOs who are harnessing the transformative power of AI for the benefit of their consumers. Supported by ambitious national agendas, a drive for progress unique to the region, and a culture open to innovation, marketing leaders in MENA are united by decisive priorities: placing customer centricity at the core by delivering personalisation at scale through AI, while equipping their teams to embrace AI's emerging technologies.

Yet, this optimism is not without its tests. With opportunity comes the challenge to build enduring brands, to balance authenticity with reach in cultural marketing, and to unlock tangible value from AI while staying ahead in a fast-evolving landscape.

We hope this CMO Barometer provides not just hard data but a platform for open dialogue - about the unique character of marketing in the Middle East, the optimism that fuels it, and how our community will continue to shape the future. We look forward to insightful conversations, collaborations, and building this story together, perhaps over a cup of our favorite brew.

NATALIE SHARDAN
RAMI HMADEH
AZHAR SIDIQQUI
Managing Partners



ABOUT THE SERVICEPLAN GROUP & THE CMO BAROMETER

CMO BAROMETER

The CMO Barometer is an annual study that surveys top marketers from the most important companies in the D-A-CH region and another eight countries. This is the fifth time it has been conducted by the Serviceplan Group internationally and the very first time in the Middle East region.

THE MARKETING SOCIETY

The Marketing Society was founded in 1959 as a not-for-profit membership organisation with the wish to connect the changemakers, those who want to make an impact and make a difference. Since then, the Marketing Society has grown to become a highly influential global community of marketing leaders with bases including England, Scotland, Hong Kong, Singapore, United Arab Emirates and New York.

SERVICEPLAN GROUP MIDDLE EAST

Serviceplan Group, Europe's largest independent advertising agency group, was founded in 1970. With its 'House of Communication' concept, Serviceplan is the only independent agency group to provide all communication services from a single source, for the creation of truly integrated concepts: the optimal basis for BUILDING BEST BRANDS. In 2010, Serviceplan Group Middle East opened its doors in Dubai catering to the entire MENA region.

FIELD TIME

September 3 – 25 2025

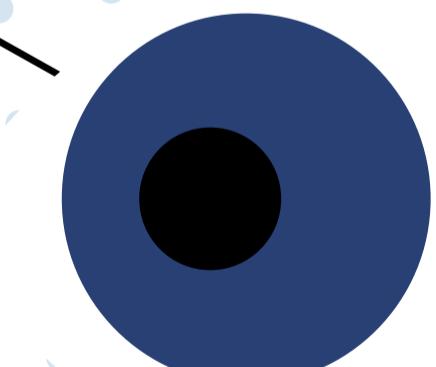
METHOD

Online survey

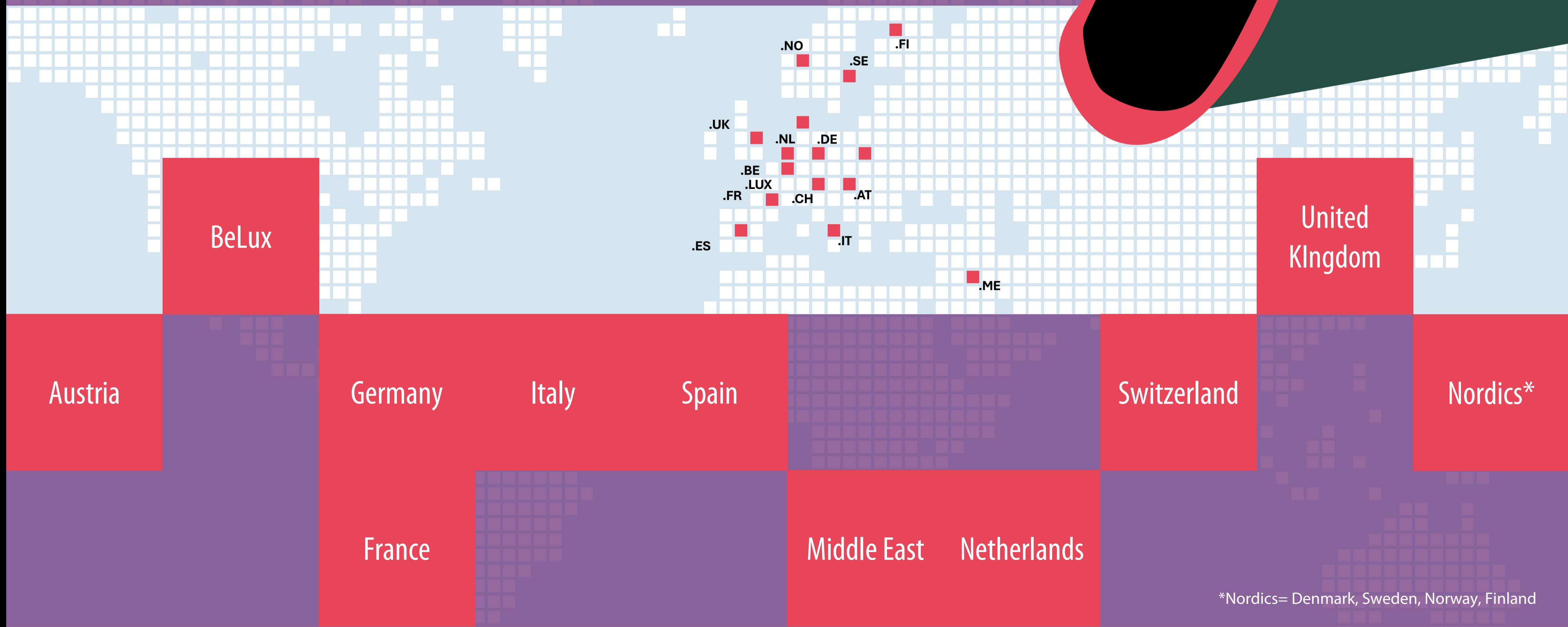
SAMPLE SIZE

N = 805

DE=192 AT=28 CH=153
BE&LUX=42 NL=107
ES=38 FR=32 IT=91
UK=47 ME=56
NORDICS=19



BROAD PERSPECTIVE: PARTICIPANTS FROM 15 MARKETS ON 2 CONTINENTS





MIDDLE EAST STUDY PROFILE

DURATION

9 min

median completion time

LOCATION

Middle
East

SAMPLE SIZE

N = 56

SAMPLE

CMOs / Marketing
decision makers

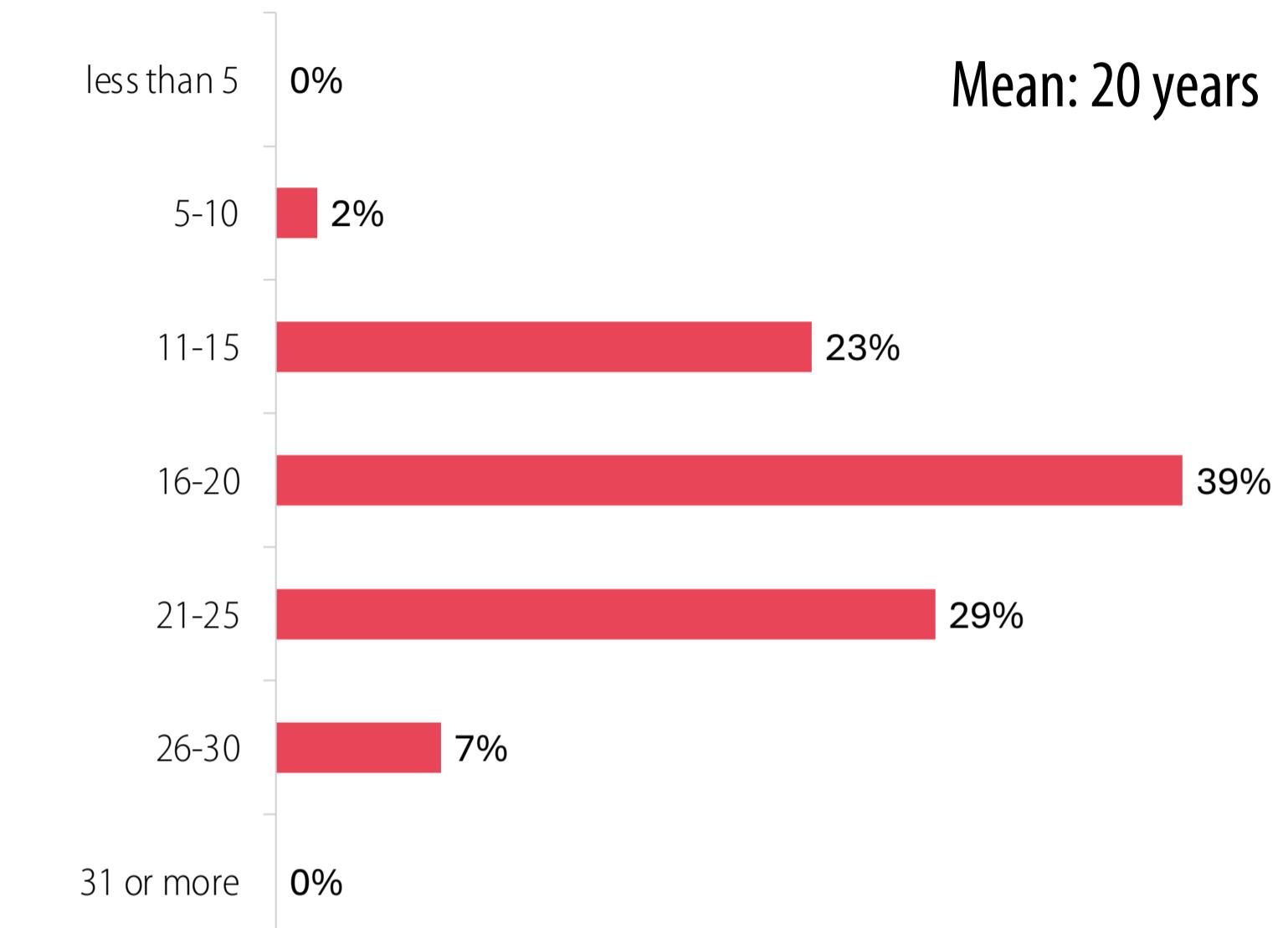
FIELD TIME

September 3 – 25 2025

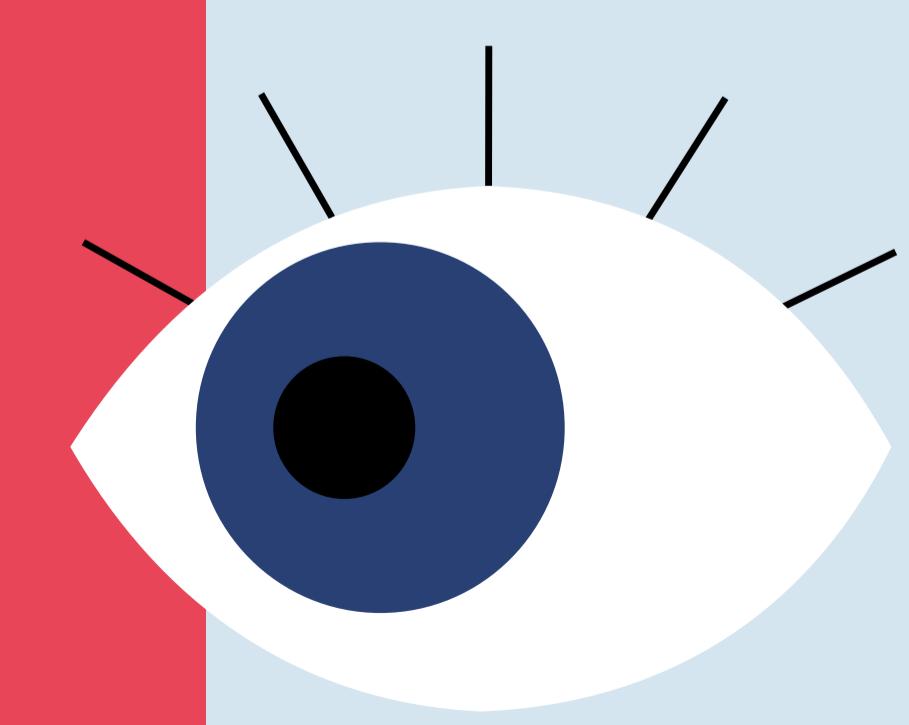
METHOD

Online survey

Experience:

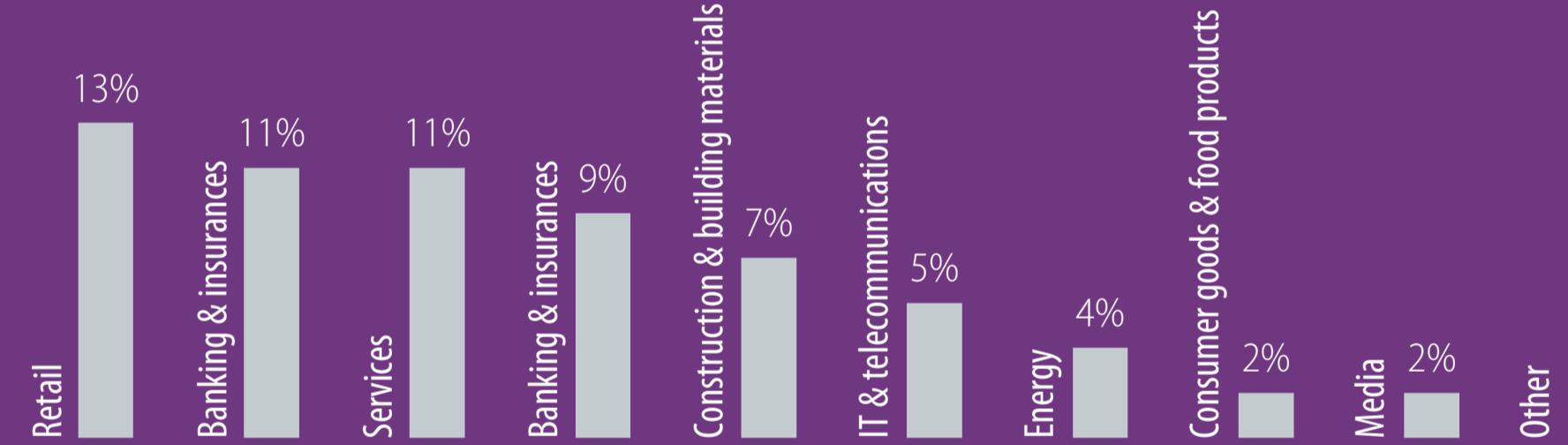


QUESTION: Approximately how many years have you been working in marketing? Base: N = 56

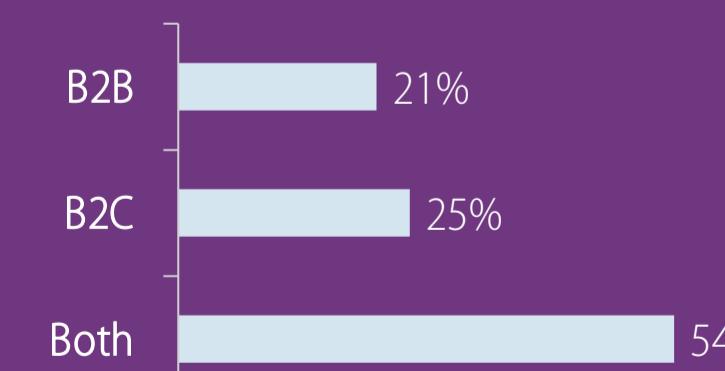




INDUSTRY



QUESTION: In which industry is your company active?
Base: N = 56



QUESTION: What is your company's primary business model?
Base: N = 56

COMPANY SIZE



QUESTION: Please indicate how many employees work in your company.
Base: N = 56



8 QUESTIONS REGARDING TRENDS, CHALLENGES AND SKILLS IN MARKETING 2026

How do you think the economic situation in your sector will develop in 2026?

1

How will your marketing budget for 2026 develop?

2

In your opinion, what is the hot topic for the marketing year of 2026?

3

How important do you think the following marketing trends will be in 2026?

4

What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?

5

Which specialist skills should a successful marketing team have?

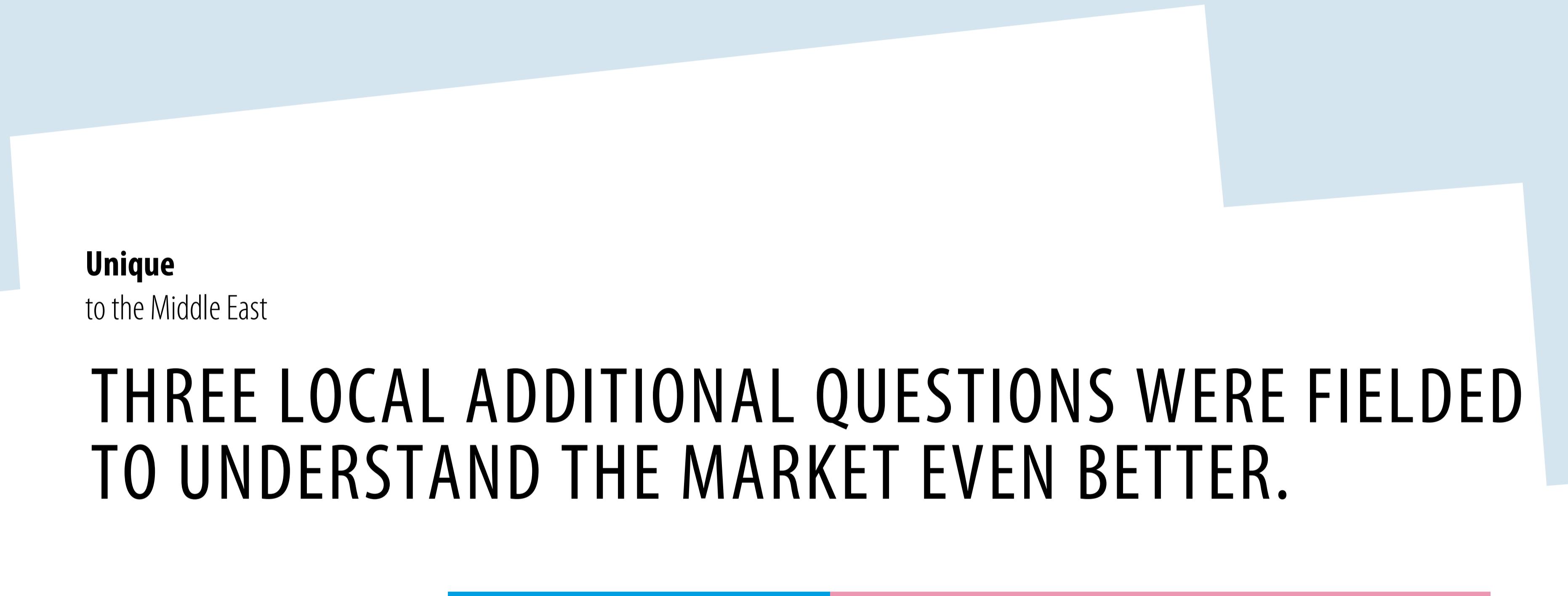
6

What kind of inspiration do you expect from your agency partners in the future?

7

Which three sources of information have been most valuable to your professional work in the last 6 months?

8



Unique

to the Middle East

THREE LOCAL ADDITIONAL QUESTIONS WERE FIELDDED TO UNDERSTAND THE MARKET EVEN BETTER.

Which marketing challenge would you most want AI to help you solve as a marketer?

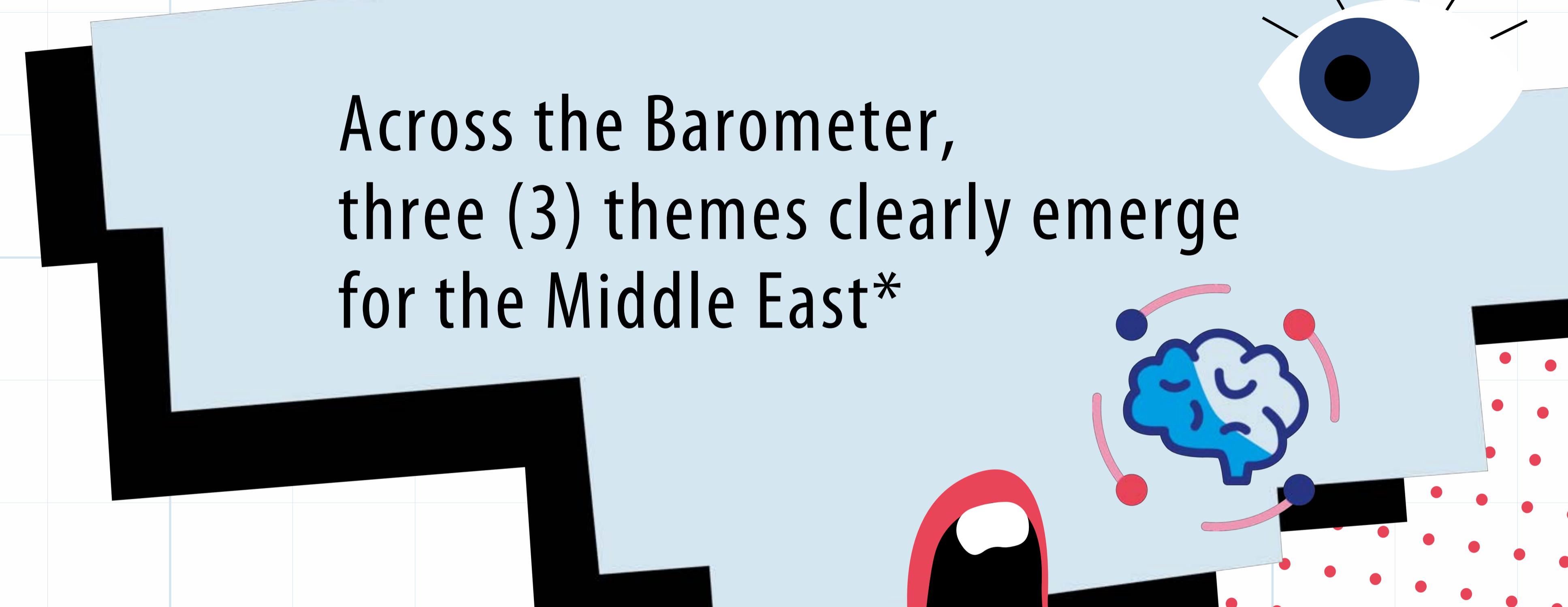
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What would you say is the biggest capability gap possibly holding you back from embracing or fully adopting AI in your marketing efforts?

10

If AI could give you one marketing superpower tomorrow, what would it be, and why?

11



Across the Barometer,
three (3) themes clearly emerge
for the Middle East*



*Full Q&As are available in the “Deep Dive” chapter of this report.

THE MIDDLE EAST ADVANTAGE: OPTIMISTIC, AI-POWERED, FUTURE-READY

Section 1

OPTIMISM WITH INTENT

Greater confidence in their overall outlook is leading regional CMOs to prioritise more mindful, carefully targeted investments.

Section 2

CULTURE X AI

In the Middle East, cultural marketing and AI-powered personalisation are both key priorities that strengthen customer centricity.

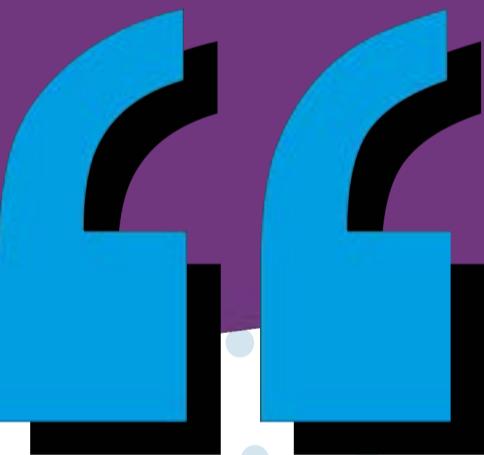
Section 3

TALENT + AI

CMOs recognize that teams of the future are those equipped with the right strategic and AI capabilities to succeed in a rapidly changing landscape.



As pressure on ROI and cost control intensifies, the defining superpower for CMOs will be
**ADAPTABILITY: THE SHIFT FROM IQ TO EQ AND
ULTIMATELY TO AQ, combined with THE ABILITY TO
BUILD STRONG MARKETING ECOSYSTEMS.**



GEORGE YARYURA
Senior Vice President,
Head of CIBG Marketing I Marketing &
Communications Group, Mashreq

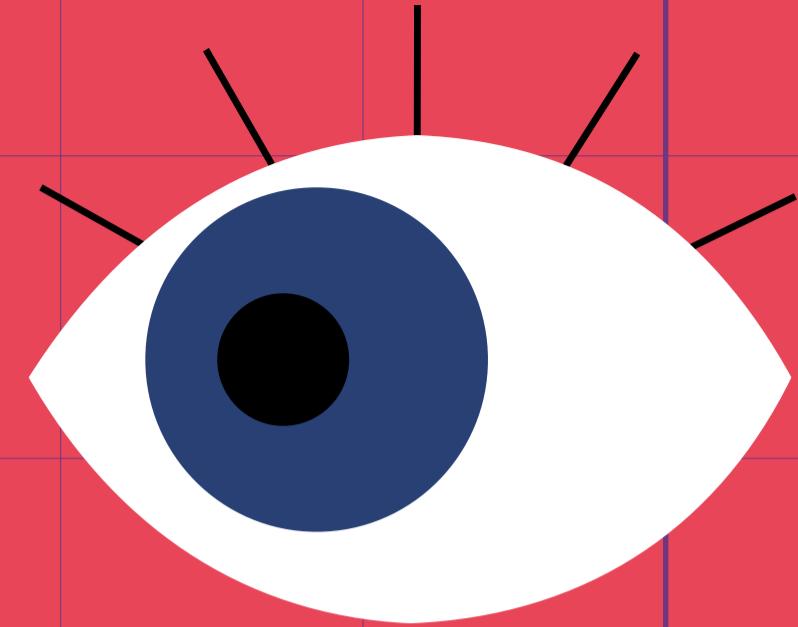
Section 1

OPTIMISING RISING

Full Q&A Findings are available in the “Deep Dive” chapter of this report.



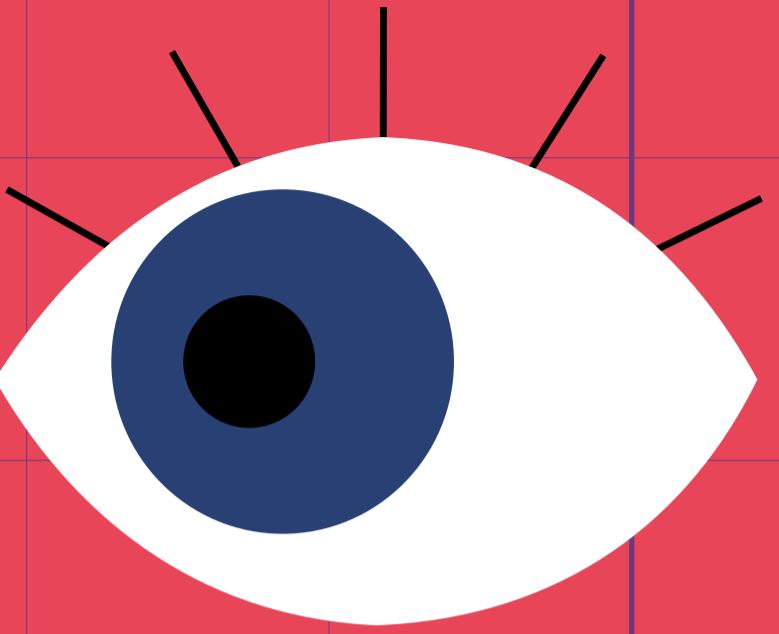
REGIONAL OPTIMISM IS OUT OF SYNC WITH OTHER MARKETS – BUT IN A GOOD WAY



Across Europe, CMOs are cautious. The dominant outlook is “it will more or less stay the same”, with pessimists even outnumbering optimists in several markets.

52% of CMOs in the MENA region, on the other hand, expect the economic situation in their industry to improve in 2026, compared with only 20% on average across all markets. Only 16% expect things to get worse, versus 29% overall.

Just 16% of MENA CMOs foresee a downturn versus 29% overall, underscoring how much more optimistic and resilient the region feels compared with European sentiment.

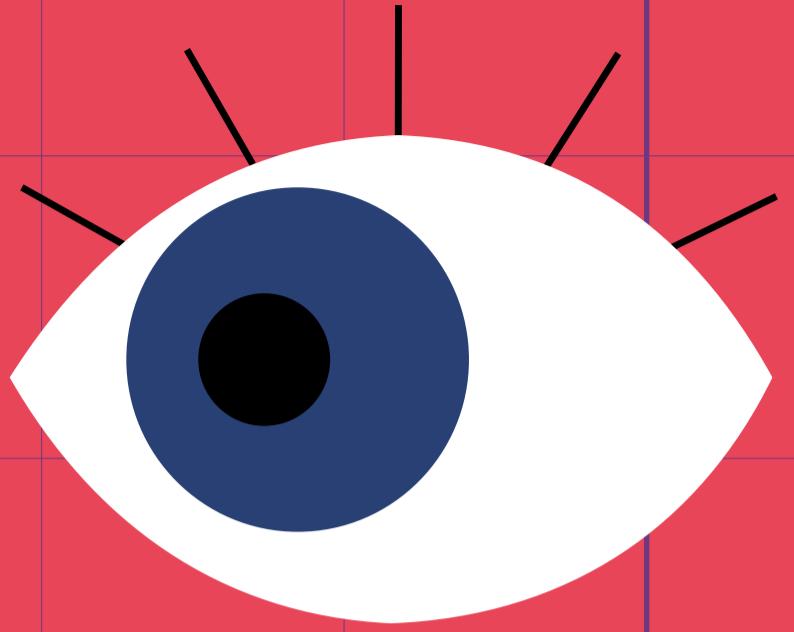


IN THE MIDDLE EAST, OPTIMISM IS CLEARLY BACKED BY INVESTMENT

43% of CMOs in the Middle East expect their 2026 marketing budgets to increase, representing one of the highest shares across all markets.

20% expect increases of more than 10%, again putting the region in a leadership position alongside the UK.

Only 27% expect budget cuts (Bottom 3), which is lower than in many European markets.



OPTMISIM WITH DIRECTION:

This is optimism anchored in AI-powered, performance-driven marketing and not vague expectations of growth.

47% of Middle East CMOs name “Artificial Intelligence and Marketing Automation” as the hot topic for 2026, far ahead of any other theme.

When asked about trends, 93% rate the use of AI in marketing processes as important/very important, and more than 90% do the same for ROI/analytics and customer experience.

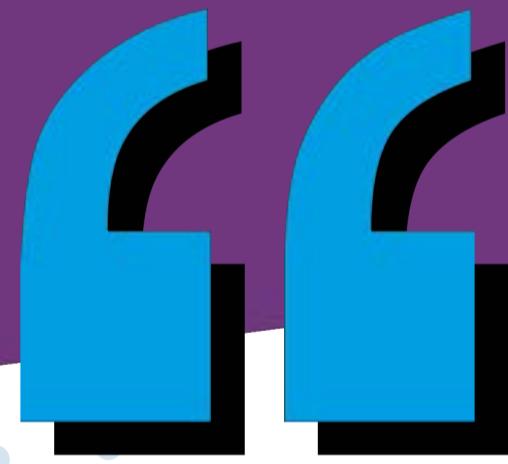


AI-DRIVEN DYNAMIC CREATIVE
OPTIMISATION, combined with CONTENT
CREATION AT SCALE, will be critical to
delivering relevance and performance in
modern marketing.

SERDAR SENAY
Director of Destination Promotion &
Digital Marketing,
Ras Al Khaimah Tourism Development Authority



THE HOT TOPIC IN MARKETING IN 2026 is the company's AI footprint. It's about how organisations will be using generative AI models, how they are using Predictive analytics and **WILL BE ABLE TO IMPLEMENT DATA-DRIVEN DECISION-MAKING.**



JAQUELINE CASINI
SVP-Marketing & Corporate Communications,
Rolls-Royce Power Systems AG

Section 2

CULTURE XAI

Full Q&A Findings are available in the **“Deep Dive”** chapter of this report.



CUSTOMER CENTRICITY IS WHERE AI BECOMES REAL

In the Middle East, AI is not discussed in isolation – it is seen as the engine of customer centricity.

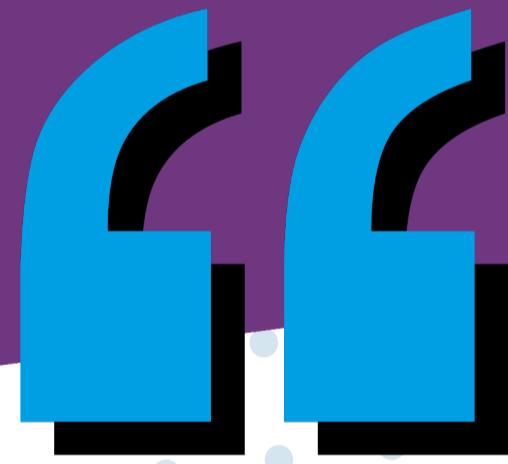
Among regional hot topics, AI and Marketing Automation (47%) sit alongside Brand Building, Digital Transformation and Customer-Centric Processes, all of which are mostly mentioned in the context of AI.

When asked what AI should help them solve most as marketers, Middle East CMOs' top 3 challenges are all customer-centric:

- Improving targeting and personalisation at scale (46%)
- Automating repetitive tasks (39%), to free time and focus
- Creating content faster and more effectively (38%) , to stay relevant and fresh.



In an AI-driven world, the biggest risk for CMOs is not moving too fast, but learning too slowly. The real superpower is rapid adoption, the courage to experiment, and empowering teams to challenge conventions before the market forces you to.



MUNIR Y. KHOJA
Managing Director,
Jameel Motorsport



REGIONALLY, CULTURAL MARKETING IS A STRATEGIC LEVER – ESPECIALLY WITH A YOUNG POPULATION

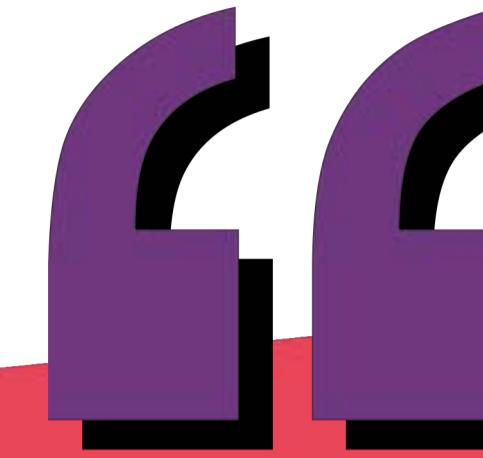
On global trends, “Cultural marketing (gaming, music, pop culture)” scores 38% overall, but in the Middle East it is much higher: 57% of

CMOs in the region consider it important or very important.

CMOs in MENA remain highly focused on understanding regional consumers, especially younger audiences who make up a significant share of the

population. Cultural marketing is a clear priority, as brands work to stay relevant by tapping into local behaviours, values, and interests across music, gaming, content, and social platforms.

Customer centricity in MENA is built on both data and cultural understanding, reflecting how language, music, gaming, and social platforms shape the behaviours of the region’s young consumers.



The make-or-break factor is embedding AI into everyday workflows, inside the tools marketers already use (CRM, analytics, campaign ops). **ADOPTION IS A LEADERSHIP JOB:** pick 2–3 concrete use cases, train to competence, and track hard metrics (e.g. tests per week). When AI is 'in the flow,' it increases speed and decision quality, faster customer learning, sharper targeting/creative, smarter budget allocation. Teams that normalise daily use and hold leaders accountable for usage and outcomes will see durable gains; everyone else will dabble.

MARC-ANDRE HADE

Chief Commercial & Marketing Officer,
spabreaks.com



Whilst much of the 2026 conversation and buzz will focus on AI, the real imperative for marketers will be to return to the fundamentals of creating value through their brands and categories. **IN AN INFLATION-DRIVEN, LOW-DIFFERENTIATION MARKET, THE GREATEST OPPORTUNITY LIES IN DEMAND CREATION THROUGH CATEGORY REFRAMING – ESPECIALLY FOR CATEGORY LEADERS.** Rather than chasing incremental features or short-term tactics with diminishing returns, these brands will redefine what their category truly means by addressing the core needs it fulfills and telling a compelling story of why it exists. Crucially, this approach also future-proofs categories against the value destruction of an inflationary environment, where price wars can trigger a downward spiral of eroding margins, shrinking brand investment, and stifled innovation. By elevating the category's meaning and reinforcing its essential value, marketers can protect long-term growth while sustaining consumer relevance.

GUILHERME FERREIRA
Global Brand Vice President,
Cadbury



PERSONALISATION AT SCALE IN THE REGION = AI + CULTURAL NUANCE + LOCALISATION

89–90% of ME CMOs rate customer experience, personalisation, and customer journey improvement as important/very important.

Localisation is considered important by 63% in ME, the highest across markets, reinforcing that CMOs want to adapt assets to local cultural contexts.

MENA CMOs already see the biggest value in:

- Improving targeting and personalisation at scale (46%)
- Predicting customer needs and behaviours (30%)

Combined, this points to a very clear aspiration: use AI to individualise communications at scale, in culturally relevant ways, for a young, digital-first audience.



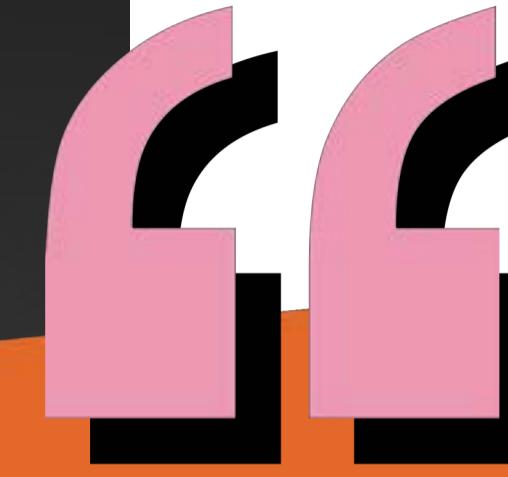
REAL-TIME EMPATHY AT SCALE - the ability to instantly understand the emotional and psychological state of every customer across all touchpoints and respond with perfect timing and relevance. **THIS GOES WAY BEYOND PERSONALIZATION.** It's about reading the room with millions of customers simultaneously. When someone's browsing your site at 2am, is it because they're excited about a project or anxious about a problem? The response should be completely different. The reason I'd choose this over something like "perfect attribution" or "flawless targeting" is that **EMOTION DRIVES EVERY PURCHASE DECISION**, but we're still mostly guessing at it. We optimize for clicks and conversions, but miss the human experience.

NAMRATA BALWANI
Chief Marketing Officer,
TPConnect Technologies

Full Q&A Findings are available in the “**Deep Dive**” chapter of this report.

Section 3

TALENT + AI



In an increasingly competitive market, the real superpower for today's CMOs is **CREATING, PROMOTING AND CLEARLY COMMUNICATING VALUE**, by combining data-driven decision-making with human- and customer-centric communication.

SHAHAD NASSIER

Managing Director MARCOM
Abdul Latif Jameel

TEAMS OF THE FUTURE: EQUIPPING TEAMS TO ADOPT & LEVERAGE AI



When asked which specialist skills a successful marketing team should have, Middle East CMOs put “Strategic marketing & brand management” clearly at the top (79%).

This is followed by AI expertise (54%), Creativity (46%), and (Data) analytics (43%), with digital marketing and content creation next.

The message: Teams of the future are expected to combine strong strategic & brand capabilities with AI, data and creativity and not necessarily replace one with the other.



CMOs ARE CONFIDENT, BUT NOT COMPLACENT

21% of Middle East CMOs feel very confident and 66% somewhat confident that their teams have the right skills for the next 2–3 years, a stronger confidence profile than the global average (only 17% very confident, and 1 in 5 worried)

This suggests that ME teams are starting from a relatively strong base, but still see a need to evolve, especially around AI and data.





MY SUPERSKILL? BEING A CHANGE AGENT!

Marketing processes, teams and skills will have to change massively and we need the vision to see what will be possible, implement early, learn, and upskill our teams.

DOMINIQUE WEISS

Interim Manager & Fractional CMO,
brandinterim



SKILLS AND TALENT, NOT TOOLS, ARE THE BIGGEST BARRIERS TO AI ADOPTION

When asked directly about the biggest capability gap holding them back from fully adopting AI, ME CMOs highlight:

- Skills & Talent – 36% (biggest barrier)
- Tools & Technology – 21%
- Use of AI Agents – 21%
- Data & Insights – 11%
- Ethics & Governance – 11%

This reinforces that upskilling people, and not merely investing in more tech, is the true differentiator for “Teams of the Future”.

THE CMO AS THE CHIEF TRANSFORMATION OFFICER

Globally, CMOs describe their “superpowers” in a way that is very aligned with what ME leaders are striving for:

- Digital & tech literacy (45%), customer centricity (39%), leadership & team management (38%), innovation power (37%), and vision & strategy (30%) are seen as the key capabilities.

In the Middle East specifically, Leadership & team building (38%), Innovation (33%), Strategic vision & adaptability (27% each), and Customer-centric approaches (20%) are named as crucial CMO skills.

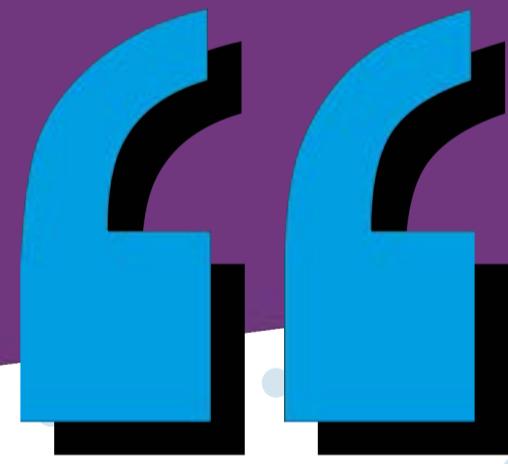
This paints a picture of the “Next Human” CMO:

- Technologically fluent
- Deeply people-oriented
- Capable of driving transformation and embedding AI into everyday workflows.





AI is transforming the way teams operate, but the real superpower for CMOs lies in EMPATHY, CREATIVITY AND ADAPTABILITY – capabilities that technology cannot replace.



CHIRIN KHAWATMI

Chief Brand Officer
Mumzworld.com



As marketing enters an era of AI-powered hyper-personalisation, the true superpower of the CMO is orchestrating growth; ALIGNING DATA, TECHNOLOGY, CREATIVITY AND CULTURE, WHILE TURNING COMPLEXITY INTO CLEAR, TRUST-DRIVEN STRATEGIES THAT CREATE MEANINGFUL CUSTOMER EXPERIENCES."



WALID ASSAAD

Chief Marketing & Growth Officer
Matbakhi

AFTERWORD

YOUR EXPECTATIONS FROM YOUR AGENCY PARTNERS



CREATIVE THINKING AND PROACTIVE PARTNERSHIP ARE THE NEW EXPECTATIONS IN THE MIDDLE EAST

Creativity and new ideas top the list (73%)

- CMOs expect agencies to bring stronger creative thinking and out-of-the-box

ideas, signaling that originality remains a key differentiator in the region.

Innovation and proactivity are nearly just as important (68%)

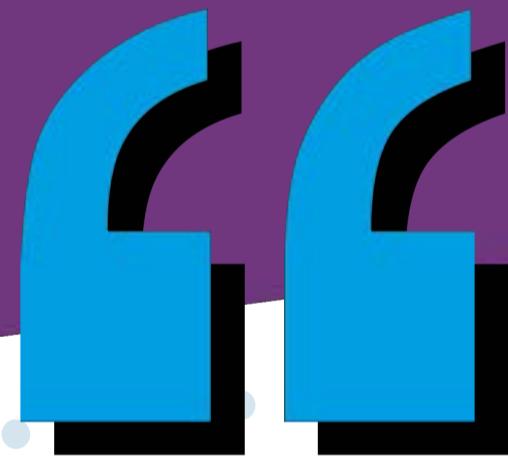
- Beyond creativity, agencies are expected to take initiative, spotting opportunities early and driving new approaches rather than waiting for briefs.

Market and audience insight is a core value-add (52%)

- CMOs look to agencies for sharper understanding of market trends and consumer behaviours, reinforcing the region's emphasis on culturally informed and data-aware decision-making.



The CMO Barometer emphasizes that marketing science and practice must work together even more closely in the future in order to provide effective marketing knowledge. Scientific publications alone are rarely taken into account in practice—DIGITAL, CREATIVE, and DIGESTIBLE knowledge exchange is what is needed.



PROF. DR. SVEN REINECKE

Executive Director,
University of St. Gallen

DEEP DIVE
**DETAILED Q&A OVERVIEW
OF STUDY RESULTS**



A SYSTEM RESET FOR MARKETING

We are living in a time of constant acceleration. Every few months, the rules seem to change – economically, politically, and technologically. But one thing is clear: the marketing system as we knew it is being rewritten.

AI is no longer a buzzword or a side project. It has become the backbone of modern marketing: transforming processes, reshaping roles, and demanding new skills from everyone, especially CMOs. This year's study makes one thing unmistakably clear: AI has become a leadership task. It's not just about tools and automation, but about vision, direction, and the ability to connect people, creativity, and technology.

I believe that those who approach this transformation with curiosity and courage – who learn, experiment, and lead their teams through it – will define the next era of marketing. Not by chasing every new trend, but by linking technology with human insight and creative ambition.

And in times of such fundamental change, one thing remains essential: collaboration. Because no one can navigate this transformation alone. Only together across teams, disciplines and borders, we can unlock the full potential of what's ahead: **TOGETHER WE ARE UNLIMITED.**

So yes, the system is updating. Let's make sure we're the ones writing the new code.

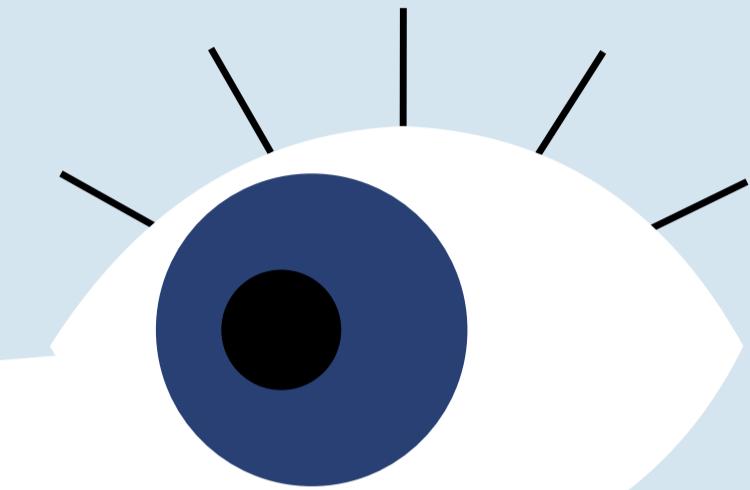
FLORIAN HALLER



DEEP DIVE

Detailed Q&A Overview of Study Results

The following slides summarize all questions and answers. Each question first shows the global results, including the Middle East, followed by regional results for a direct comparison of global and regional trends.





8 QUESTIONS REGARDING TRENDS, CHALLENGES AND SKILLS IN MARKETING 2026

How do you think the economic situation in your sector will develop in 2026?

1

How will your marketing budget for 2026 develop?

2

In your opinion, what is the hot topic for the marketing year of 2026?

3

How important do you think the following marketing trends will be in 2026?

4

What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?

5

Which specialist skills should a successful marketing team have?

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What kind of inspiration do you expect from your agency partners in the future?

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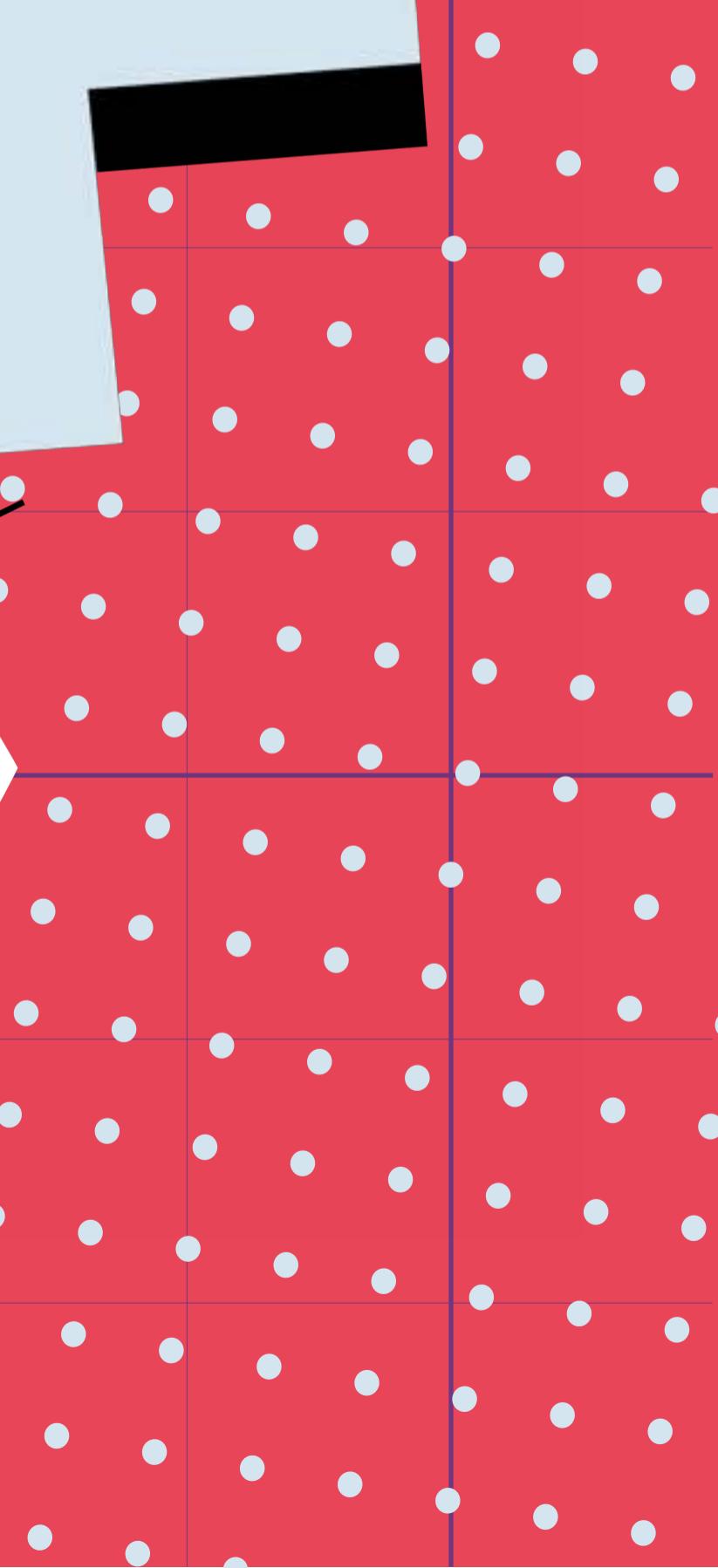
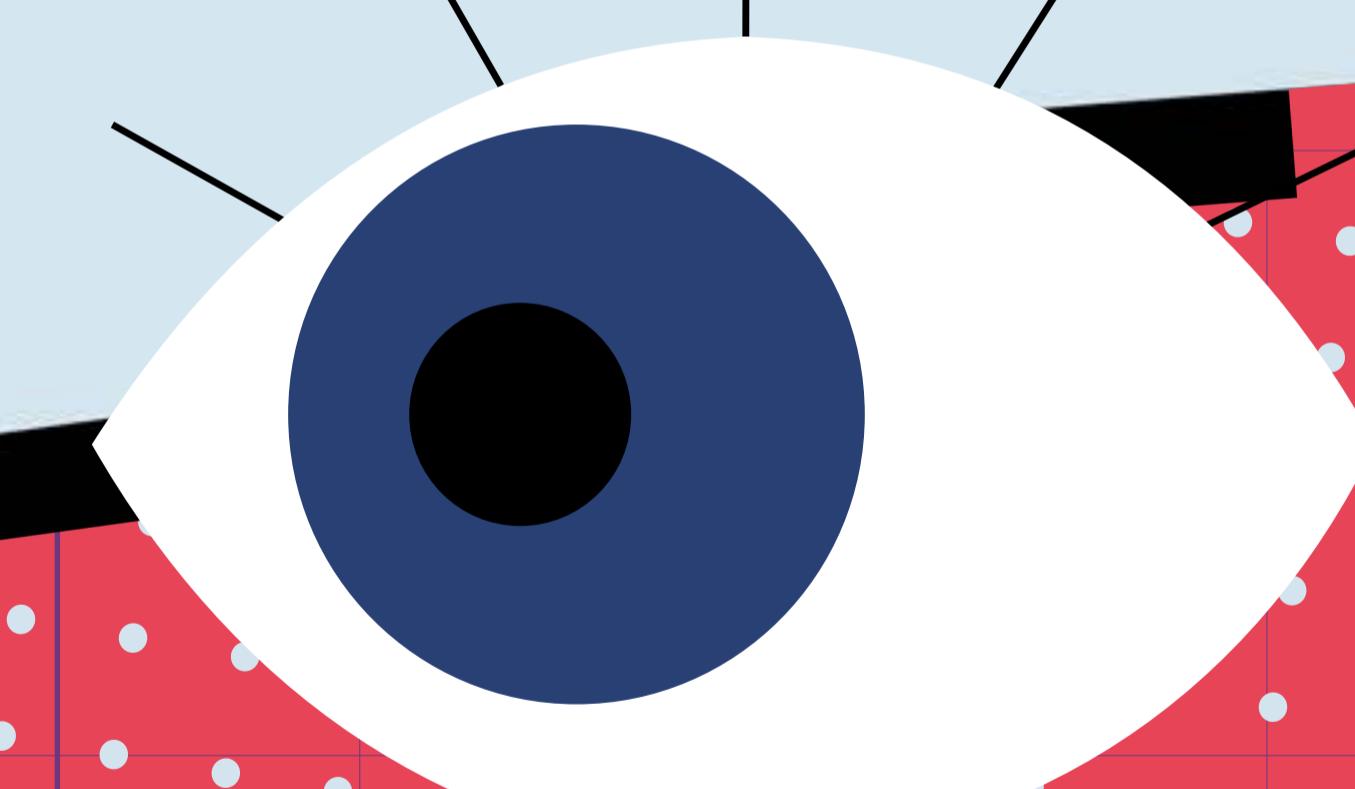
Which three sources of information have been most valuable to your professional work in the last 6 months?

8

QUESTION

1

How do you think the economic situation
in your sector will develop in 2026?



CAUTION RULES, ALMOST EVERYWHERE, GLOBALLY.

Everywhere, bold forecasts remain rare. Most CMOs see steady conditions ahead, led by Spain's two-thirds majority. Only the Middle East stands out: Optimism is surging, one in two CMOs is expecting improvement.

Industry outlook 2026 (sorted by country)

Numbers in percent

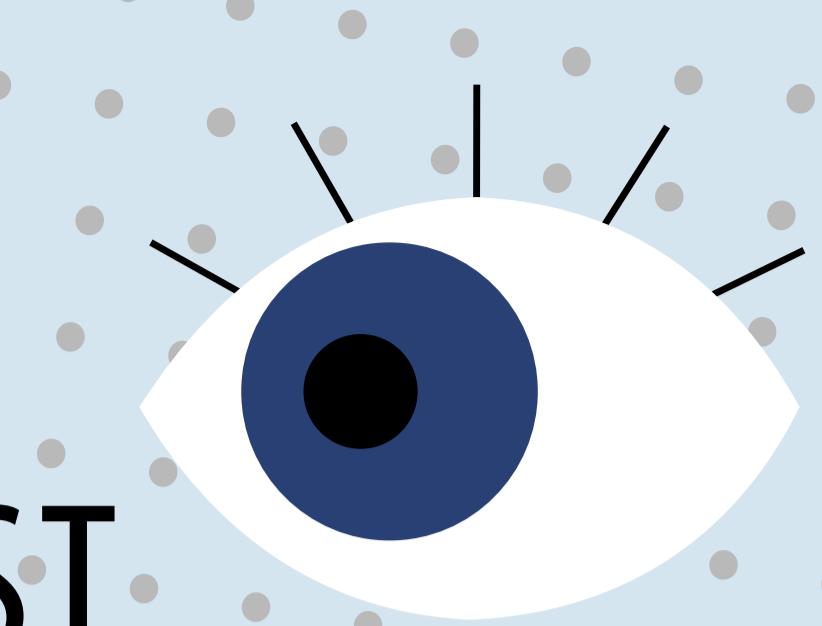
	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n=107)	ES (n=38)	FR (n=32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Top 2	17%	17%	10%	12%	21%	11%	16%	25%	23%	52%	26%	20%
It will significantly improve	1%	0%	1%	0%	5%	0%	0%	1%	0%	14%	0%	2%
It will improve	16%	17%	10%	12%	17%	11%	16%	24%	23%	38%	26%	18%
It will more or less stay the same	58%	56%	54%	52%	51%	66%	53%	41%	43%	32%	42%	51%
It will get worse	22%	22%	33%	36%	25%	21%	31%	33%	34%	14%	32%	27%
It will significantly get worse	3%	6%	3%	0%	2%	3%	0%	1%	0%	2%	0%	2%
Bottom 2	25%	28%	36%	36%	27%	24%	31%	34%	34%	16%	32%	29%

Question: How do you think the economic situation in your industry will develop in 2026? Base: N = 805

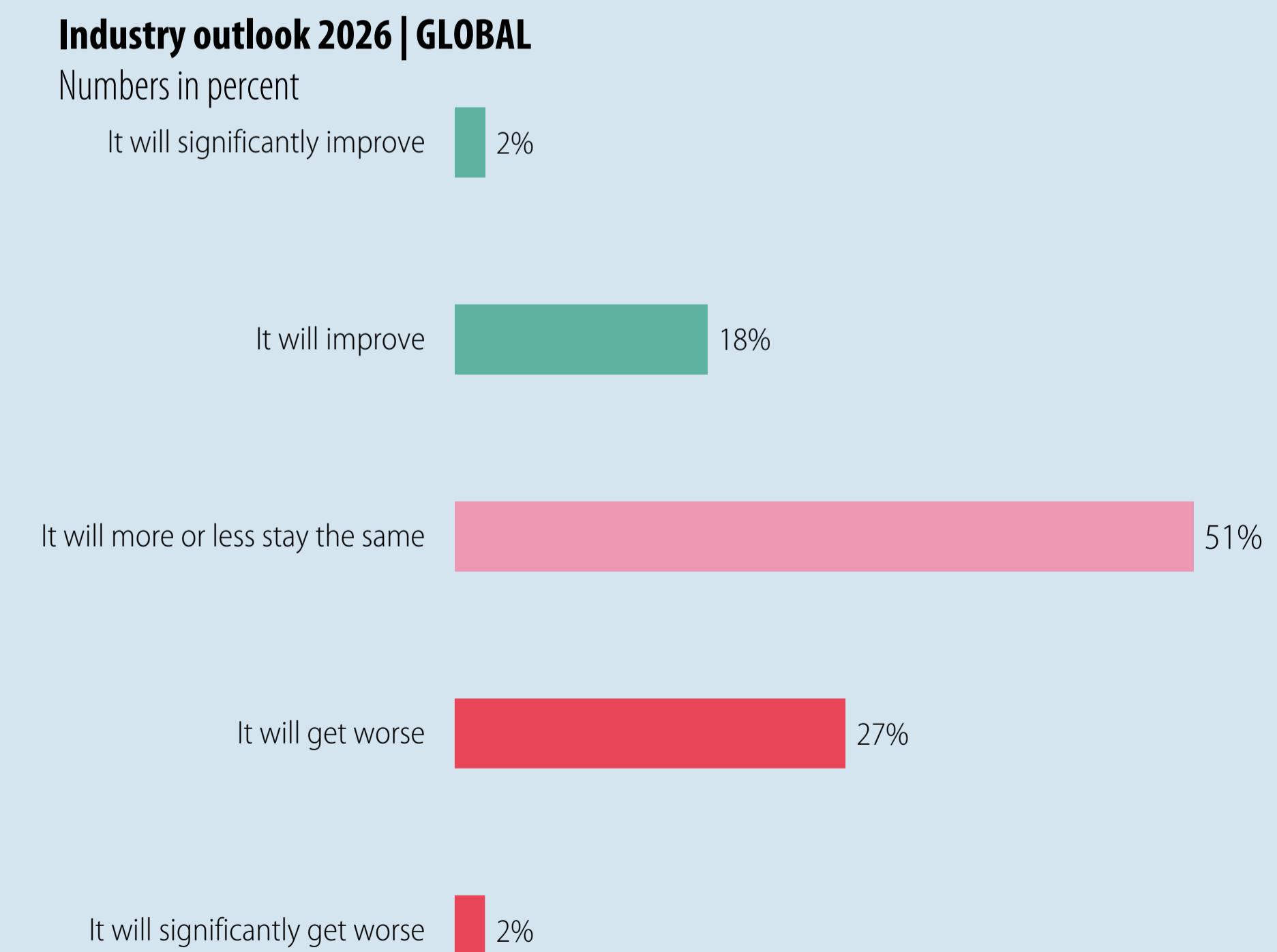
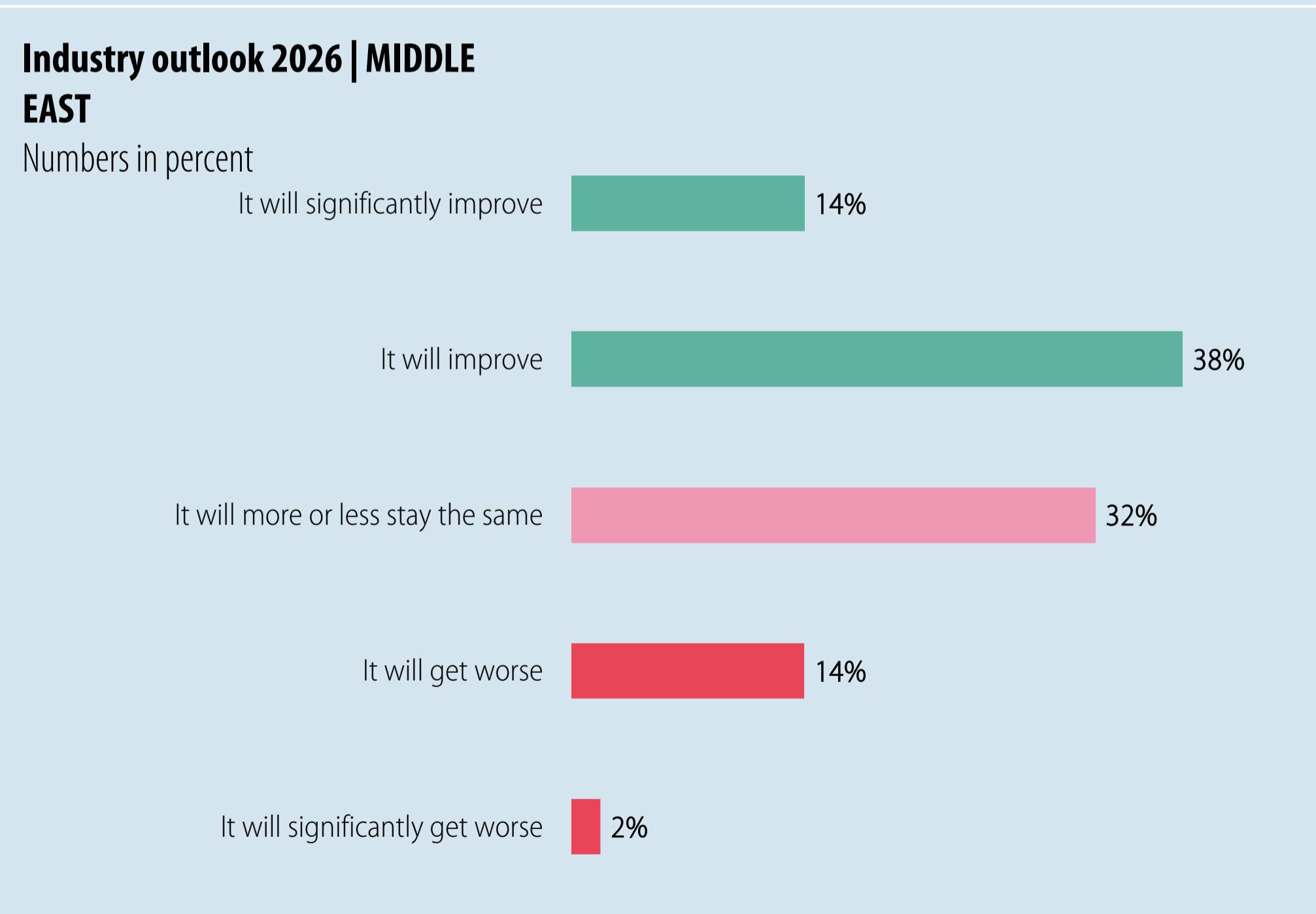
*Evaluation is not representative due to the small number of responses.



ENCOURAGING OPTIMISM IS EVIDENT ACROSS THE MIDDLE EAST



With a greater share of CMOs anticipating improvement and fewer expecting decline, the Middle East stands out as one of the most confident regions entering 2026.





How do you think the economic situation in your sector will develop in 2026?

GLOBAL FINDINGS ACROSS MARKETS

Following the Middle East, Italy, the UK, and the Nordics stand out as both the most optimistic and, at the same time, the most polarized – since they also include some of the most pessimistic respondents.

The majority of CMOs assume that the situation will remain more or less unchanged, esp. in ES (66%), DE, AT, CH, BELUX, NE, and FR.

Every second CMO in the Middle East believes in an improved economic situation.

Nearly one-third of CMOs believe the situation will worsen, with Switzerland and BELUX being the most pessimistic.

Almost no one believes that the economic situation will improve significantly, except the Middle East (14%) and the Netherlands (5%).

Very few CMOs believe that there will be a significant deterioration, with Austria having the highest percentage (6%).

The assessment in the DACH region is very similar, with only Switzerland being more pessimistic.

GLOBAL FINDINGS: A Stable Outlook on the Surface, but Caution Dominates Across Sectors

Most expect stability, with more sectors leaning pessimistic than optimistic.

Industry outlook 2026 (sorted by sector)

Numbers in percent

	Automobile industry N=23	Banking & insurances N=59	Construction & building materials N=29	Services N=99	Energy N=16*	Retail N=78	IT & telecommunications N=47	Consumer goods & food products N=192	Media N=52	Pharmaceutical / health N=34	Other N=170	Total N=805
Top 2	22%	24%	17%	19%	38%	17%	36%	17%	8%	9%	23%	20%
It will significantly improve	4%	0%	0%	2%	0%	0%	11%	1%	0%	0%	5%	2%
It will improve	17%	24%	17%	17%	38%	17%	26%	16%	8%	9%	18%	18%
It will more or less stay the same	26%	54%	69%	45%	38%	58%	40%	50%	54%	68%	52%	51%
It will get worse	39%	20%	14%	33%	25%	23%	19%	32%	37%	24%	23%	27%
It will significantly get worse	13%	2%	0%	2%	0%	3%	4%	1%	2%	0%	2%	2%
Bottom 2	52%	22%	14%	35%	25%	26%	23%	33%	38%	24%	25%	29%

Question: How do you think the economic situation in your industry will develop in 2026? Base: N = 805

*Evaluation is not representative due to the small number of responses.

How do you think the economic situation in your sector will develop in 2026?

GLOBAL FINDINGS ACROSS SECTORS

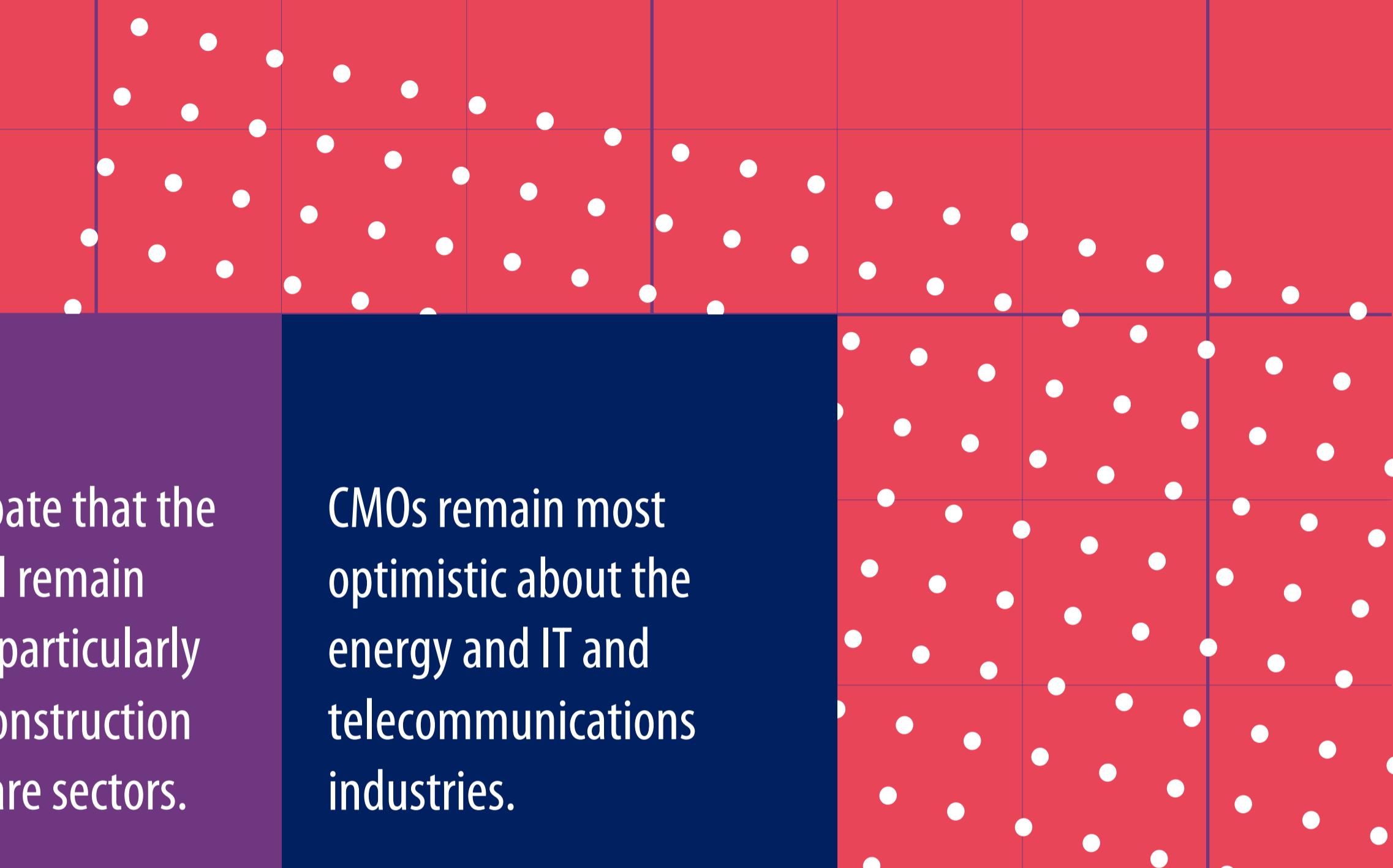
CMOs anticipate that the situation will remain unchanged, particularly within the construction and healthcare sectors.

CMOs remain most optimistic about the energy and IT and telecommunications industries.

In the IT and telecommunications sector, more than one in ten CMOs believe that the economic situation will improve significantly.

The automotive industry is the most pessimistic. Half of all (CMOs) believe that the situation will worsen.

CMOs from the automotive sector are the most pessimistic, followed by services, consumer goods & food products, and media.



QUESTION

2

How will your marketing budget for 2026 develop?





OPTIMISM DEPENDS ON GEOGRAPHY

Mood by map: CMO sentiment varies widely by country. In the Netherlands, Italy, the UK and the Middle East, the outlook is far brighter than in Austria.

Marketing budget projection 2026 (sorted by country)

Numbers in percent

	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n=107)	ES (n=38)	FR (n= 32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Top 3	30%	17%	22%	24%	41%	16%	19%	45%	43%	43%	32%	32%
It will increase by more than 10%	7%	0%	3%	5%	7%	0%	3%	8%	17%	20%	11%	7%
It will increase by 5 to 10%	10%	6%	7%	0%	21%	3%	6%	18%	11%	11%	5%	10%
It will increase by max. 5%	13%	11%	12%	19%	14%	13%	9%	20%	15%	13%	16%	14%
It will remain roughly the same	39%	33%	46%	38%	37%	55%	53%	23%	28%	30%	32%	38%
It will decrease by max. 5%	13%	17%	14%	21%	11%	11%	13%	14%	11%	2%	26%	13%
It will decrease by 5 to 10%	12%	28%	10%	12%	8%	13%	9%	14%	17%	14%	11%	12%
It will decrease by more than 10%	6%	6%	8%	5%	2%	5%	6%	3%	2%	11%	0%	5%
Bottom 3	31%	50%	32%	38%	21%	29%	28%	32%	30%	27%	37%	30%

Question: How will your marketing budget for 2026 (marketing investments and expenditure) develop? Base: N = 805

*Evaluation is not representative due to the small number of responses.



How will your marketing budget
for 2026 develop?

GLOBAL FINDINGS ACROSS MARKETS

The most pessimistic CMOs come from Austria: According to every second CMO, the marketing budget will decrease.

Italy is the most positive (45%), closely followed by the UK, the Middle East, and the Netherlands.

CMOs in Germany, BELUX and Nordics are nearly split in the middle – only in BELUX, optimists are slightly less numerous.

In Middle East, one in five CMOs believes that the marketing budget will increase by more than 10%. The UK also plays a special role (17%).

Dutch CMOs are not only among the most optimistic, but also the least pessimistic (21%).

Approximately half of all CMOs in Spain (highest value at 55%), France and Switzerland believe that marketing budgets will remain unchanged.

GLOBAL FINDINGS: BUDGETS TELL A DIFFERENT STORY

CMOs hold contrasting views on how marketing budgets are evolving – not only across industries, but also compared to their economic outlook. However, the automotive sector remains the most pessimistic.

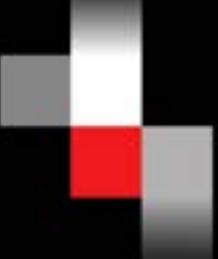
Marketing budget projection 2026 (sorted by sector)

Numbers in percent

	Automobile industry N=23	Banking & insurances N=59	Construction & building materials N=29	Services N=99	Energy N=16*	Retail N=78	IT & telecommunications N=47	Consumer goods & food products N=192	Media N=52	Pharmaceutical / health N=34	Other N=170	Total N=805
Top 3	22%	42%	28%	27%	38%	27%	43%	33%	31%	18%	32%	32%
It will increase by more than 10%	4%	14%	3%	4%	31%	4%	13%	4%	4%	3%	10%	7%
It will increase by 5 to 10%	13%	14%	14%	10%	6%	8%	15%	8%	12%	9%	11%	10%
It will increase by max. 5%	4%	15%	10%	13%	0%	15%	15%	21%	15%	6%	10%	14%
It will remain roughly the same	30%	32%	52%	45%	19%	41%	36%	33%	37%	65%	37%	38%
It will decrease by max. 5%	13%	10%	7%	9%	13%	13%	11%	17%	19%	9%	12%	13%
It will decrease by 5 to 10%	4%	12%	14%	15%	25%	13%	9%	11%	13%	9%	11%	12%
It will decrease by more than 10%	30%	3%	0%	3%	6%	6%	2%	6%	0%	0%	8%	5%
Bottom 3	48%	25%	21%	27%	44%	32%	21%	34%	33%	18%	31%	30%

Question: How will your marketing budget for 2026 (marketing investments and expenditure) develop? Base: N = 805

*Evaluation is not representative due to the small number of responses.

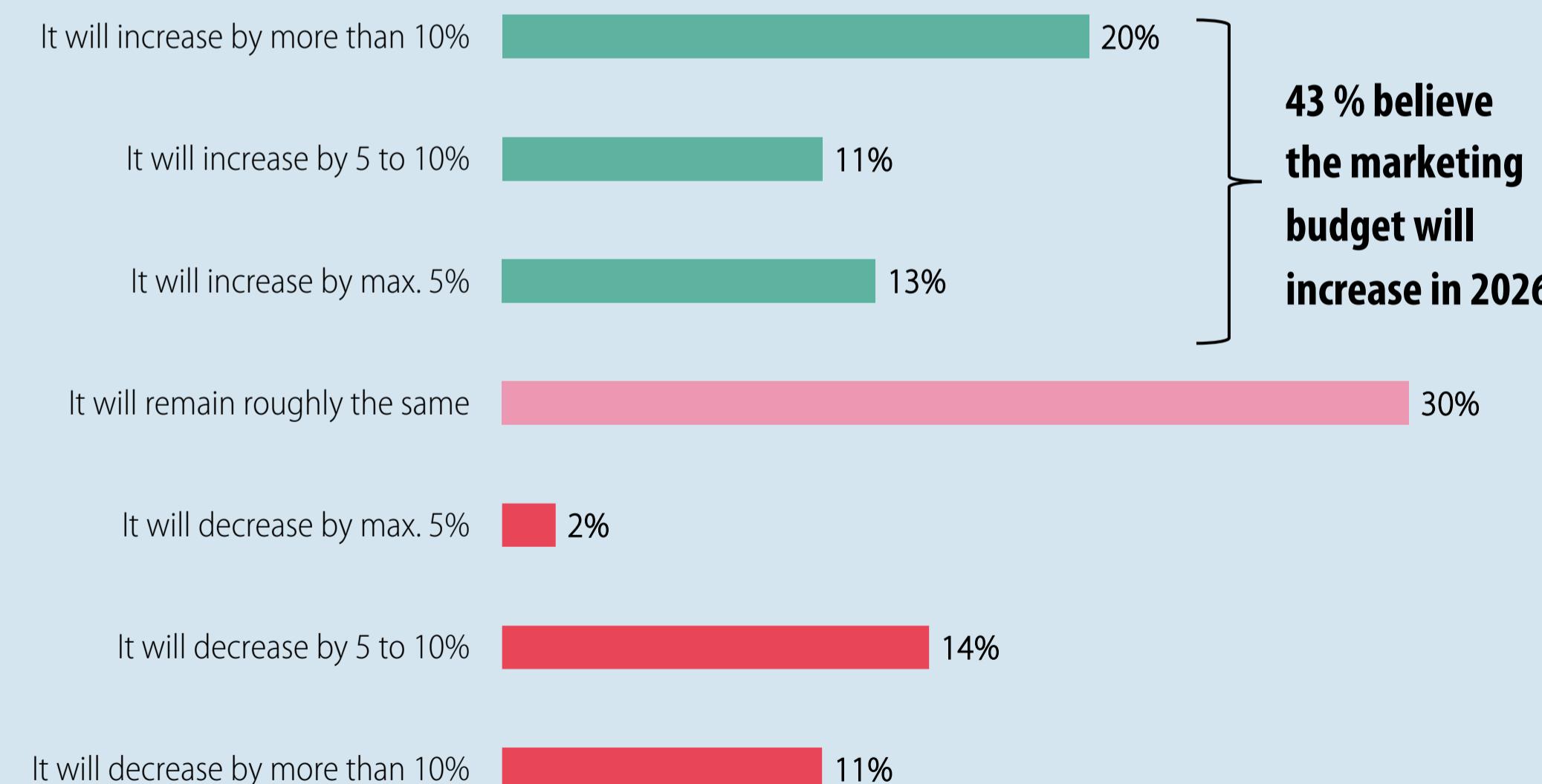


THE MIDDLE EAST EXPECTS MORE STABILITY, AND MORE GROWTH, THAN OTHER MARKETS

With higher expectations of budget increases and fewer anticipating cuts, the Middle East stands out for its more confident investment posture.

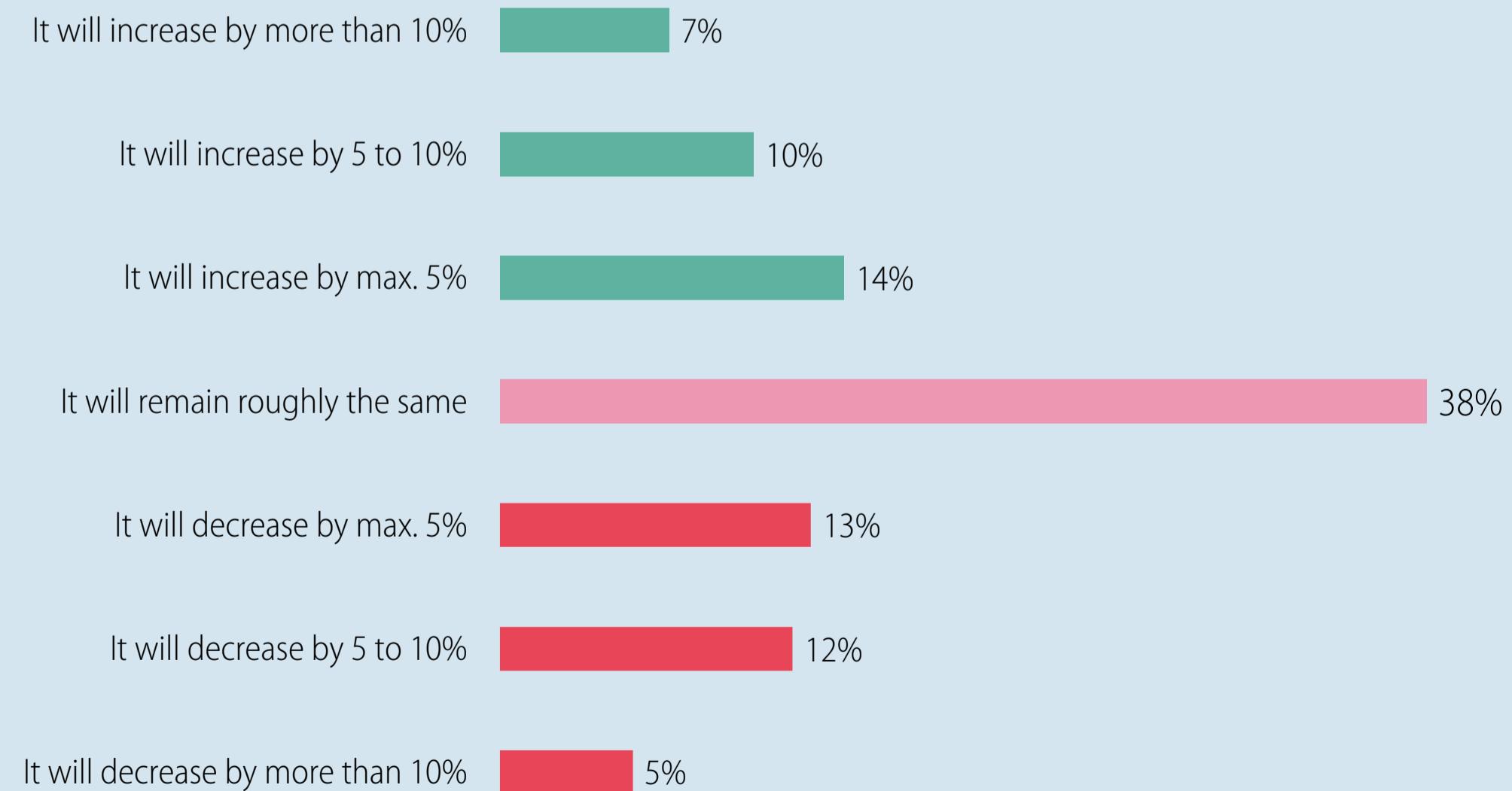
Marketing budget projection 2026 | Middle East

Numbers in percent



Marketing budget projection 2026 | Global

Numbers in percent





How will your marketing budget for 2026 develop?

GLOBAL FINDINGS ACROSS SECTORS

CMOs across consumer goods & FMCG, & media are still sitting on the fence: One third see improvement, one third expect decline, and one third see no change.

When it comes to marketing budgets, banking & insurance and IT & telecommunications are the most optimistic.

Pharma and health stay calm: 65% expect no change, few see ups or downs.

The range at Energy sector is enormous: its CMOs are among the most optimistic and the most pessimistic.

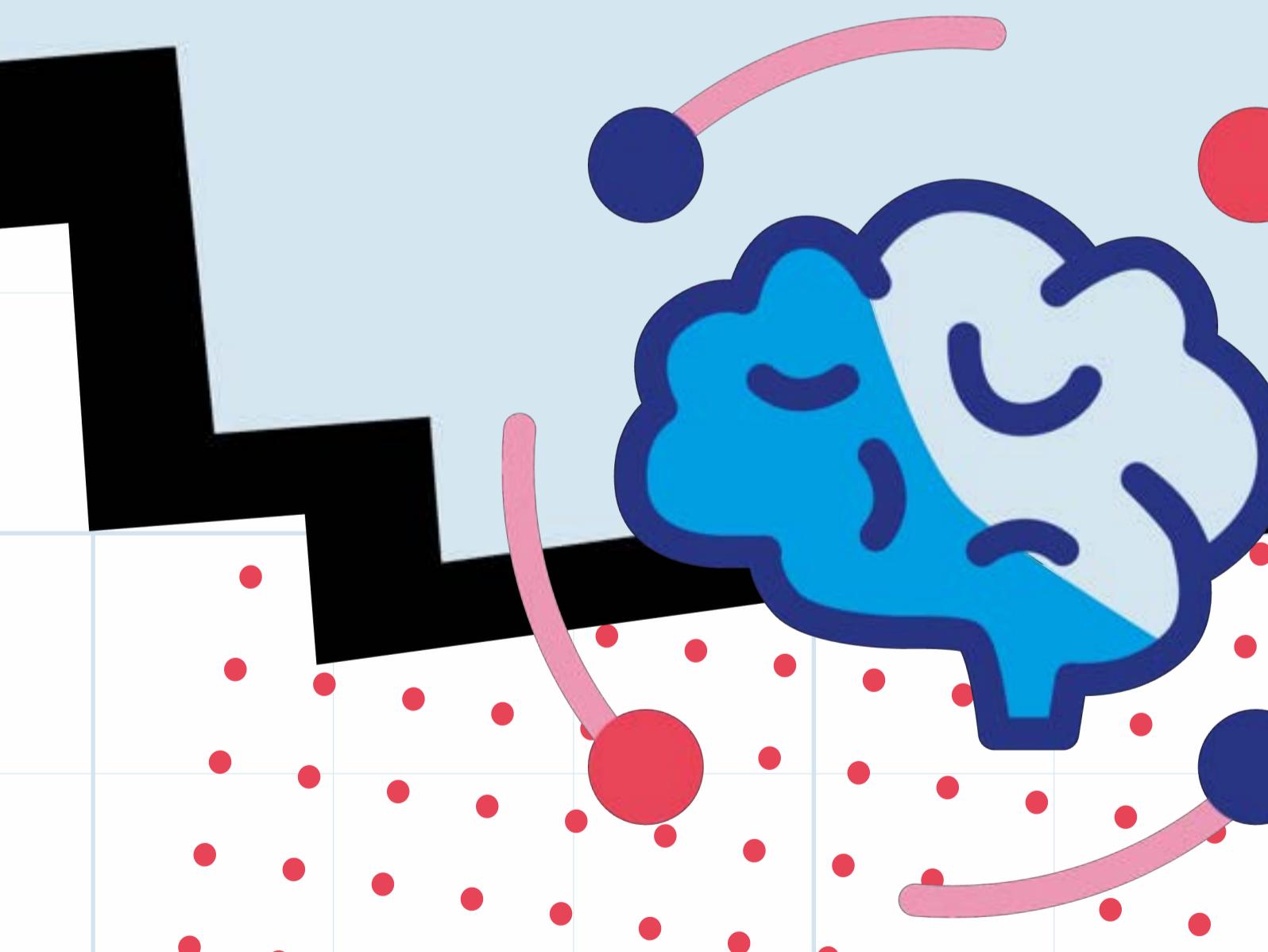
The automotive industry is the most pessimistic. One in three CMOs believes that the budget will decrease by more than 10%.

Almost one in three CMOs in the energy sector believes that their marketing budget will increase by more than 10%.

QUESTION

3

In your opinion, what is the hot topic of the marketing year 2026?

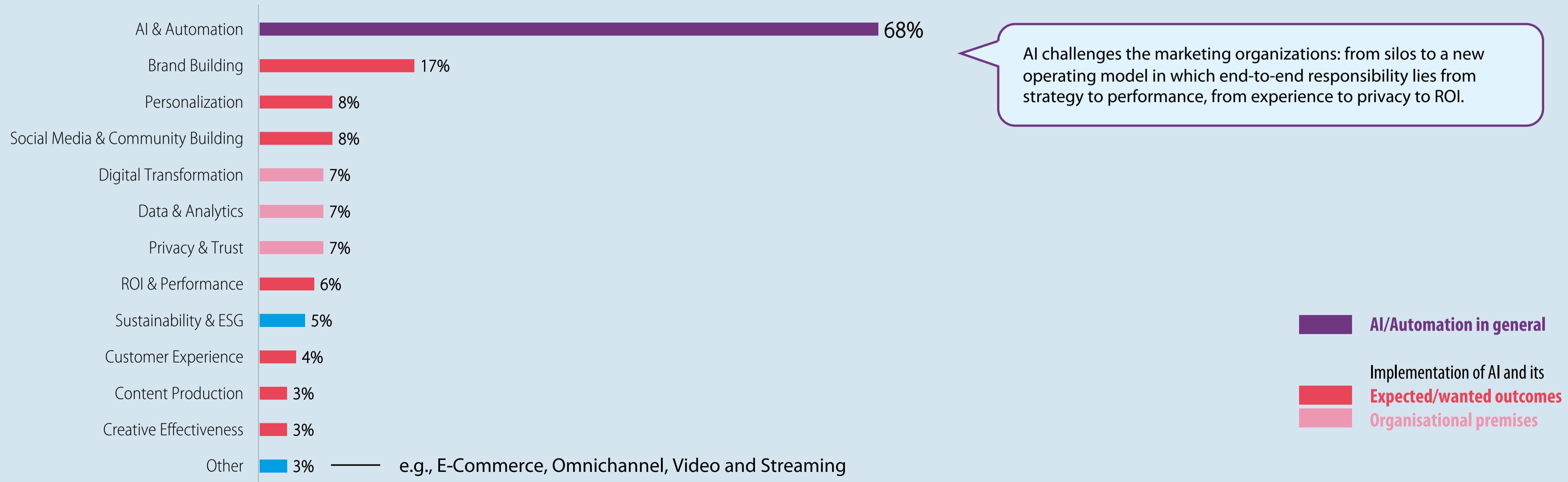


GLOBAL FINDINGS: AI REWRITES THE RULES

Most CMOs name more than one topic, indicating that AI must be fully integrated into all marketing tasks by 2026 – especially for Automation, but also for Brand Building.

Hot Topic in Marketing 2026

Derived topic clusters, numbers in percent, multiple mentions possible



Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

Usage of Gen AI and Agentic Services for improvements on Efficiency and Productivity

AI challenges the marketing organizations: from silos to a new operating model in which end-to-end responsibility lies from strategy to performance, from experience to privacy to ROI.

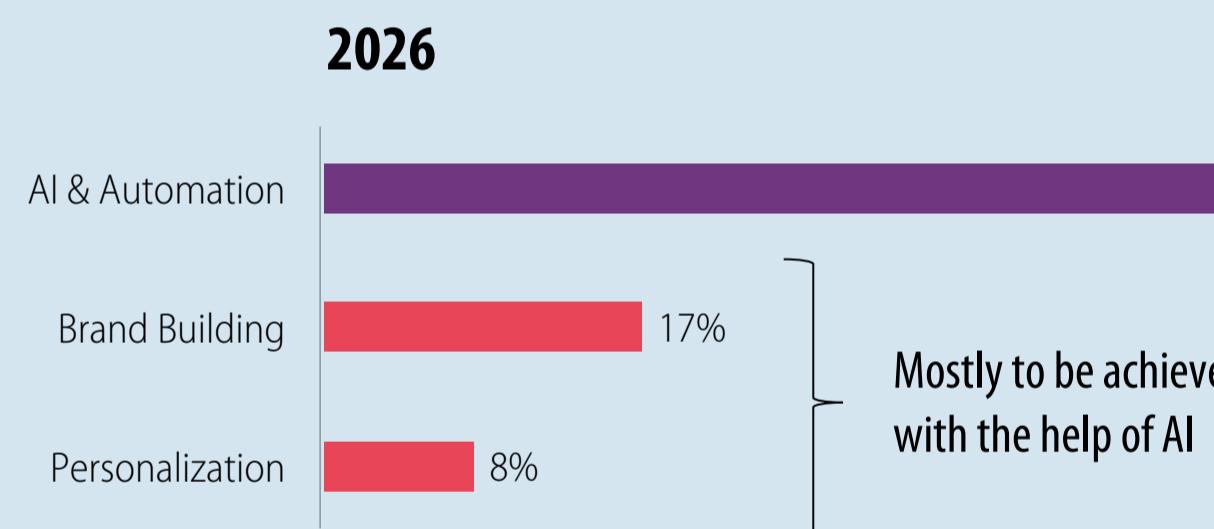


GLOBAL FINDINGS: SYSTEM UPDATE REQUIRED.

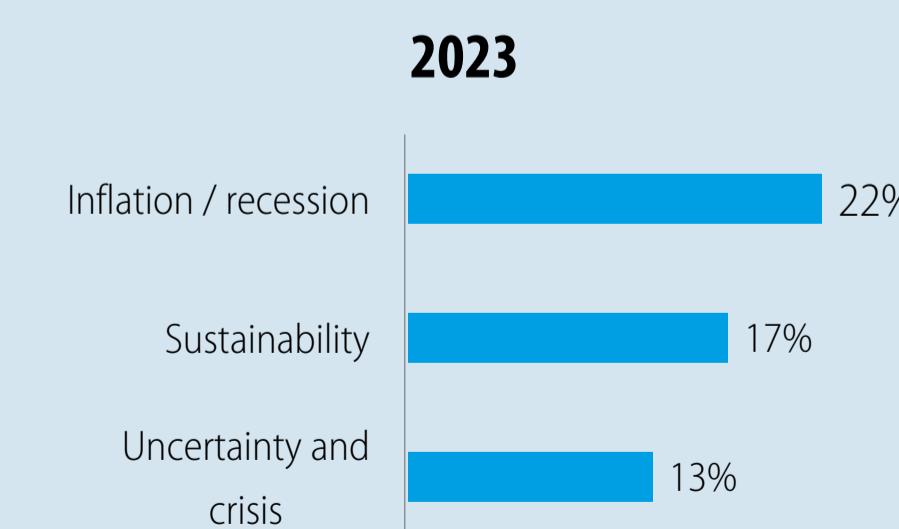
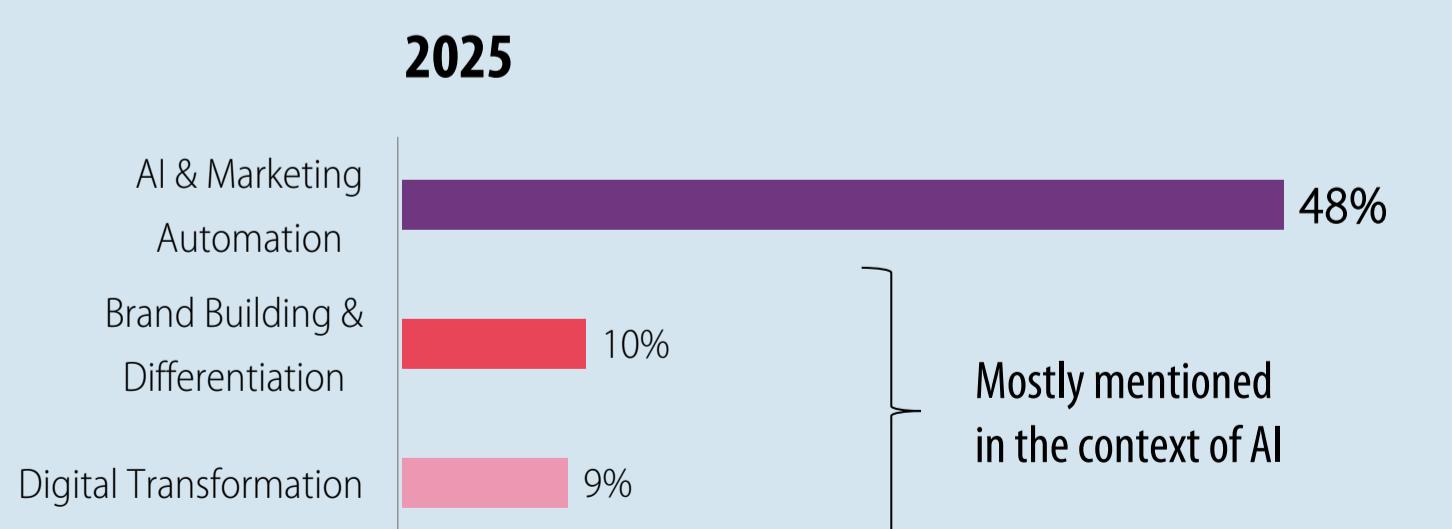
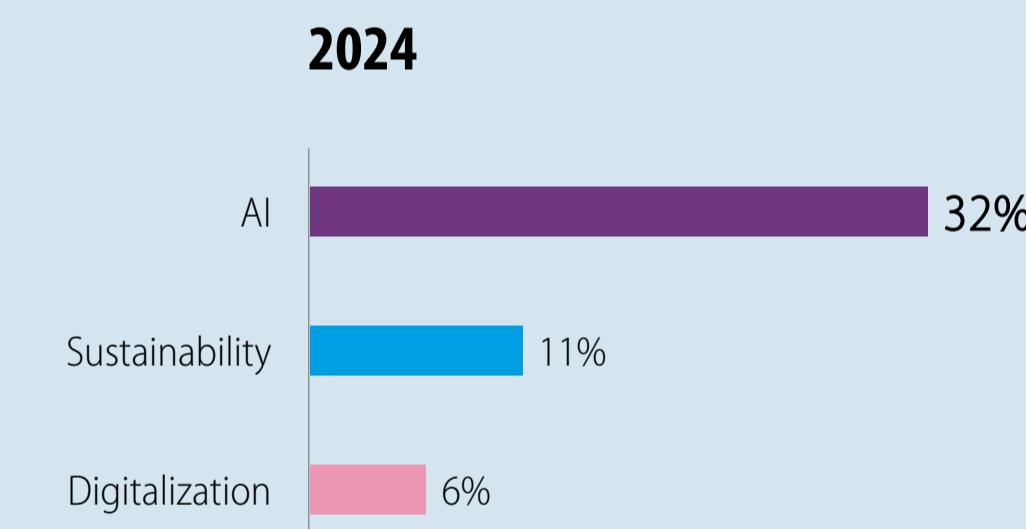
More than just a trend, AI is redefining the industry's focus – pushing softer topics to the sidelines and reshaping priorities like no trend before.

Hot Topic in Marketing 2026

Derived topic clusters, numbers in percent, multiple mentions possible



compared to 2025



- AI/Automation in general
- Implementation of AI and its
- Expected/wanted outcomes
- Organisational premises
- Other aspects (not mentioned with AI context)

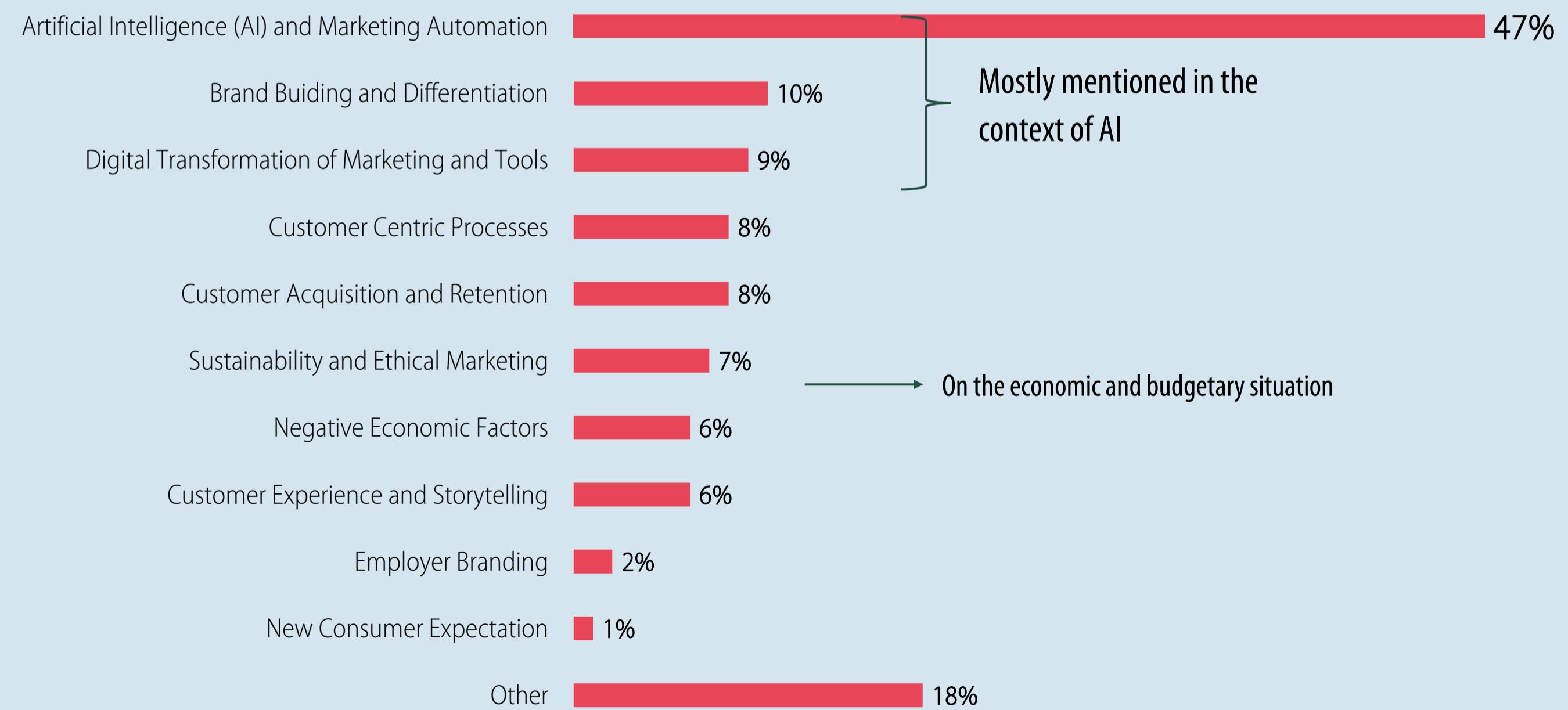
Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

ALSO IN THE REGION, IT IS A YEAR DEFINED BY AI: NO OTHER TOPIC COMES CLOSE

AI is the clear top priority, with most other topics linked to how AI will shape them.

Hot Topic in Marketing 2026

Derived topic clusters, numbers in percent, multiple mentions possible

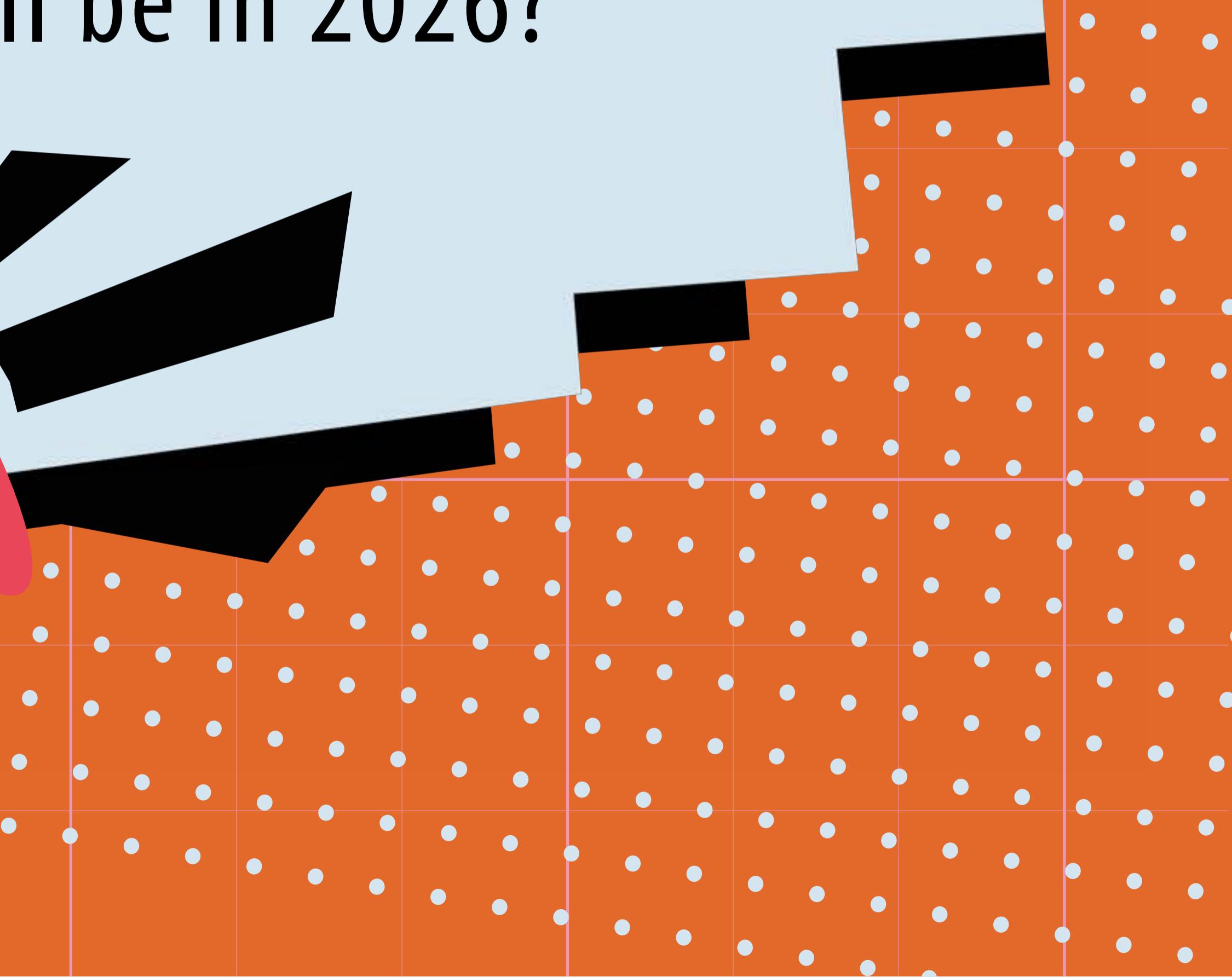


Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 56

QUESTION

4

How important do you think the following marketing trends will be in 2026?

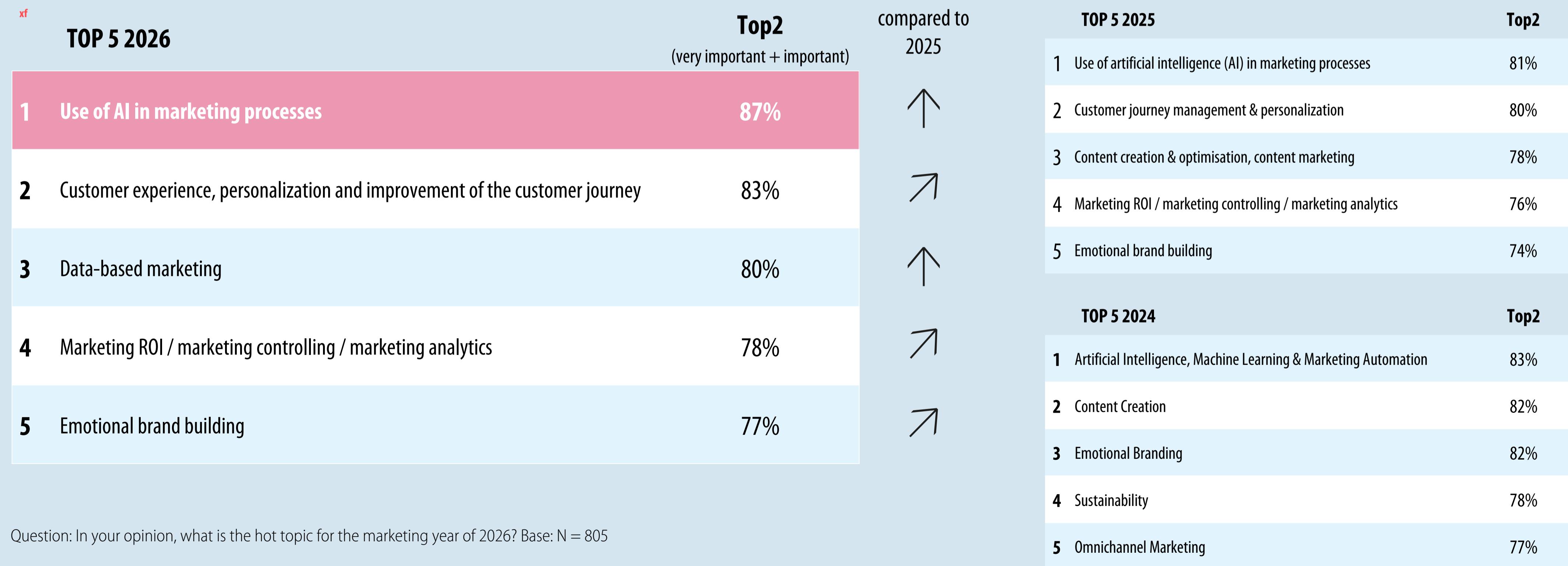


GLOBAL FINDINGS: AI PUSHES THE PACE GLOBALLY

What matters, matters even more: Marketing's next chapter is driven by AI – and with it, efficiency, effectiveness, and data. Despite the impact focus, emotional brand building still makes the Top 5.

Marketing trends 2026

Numbers in percent

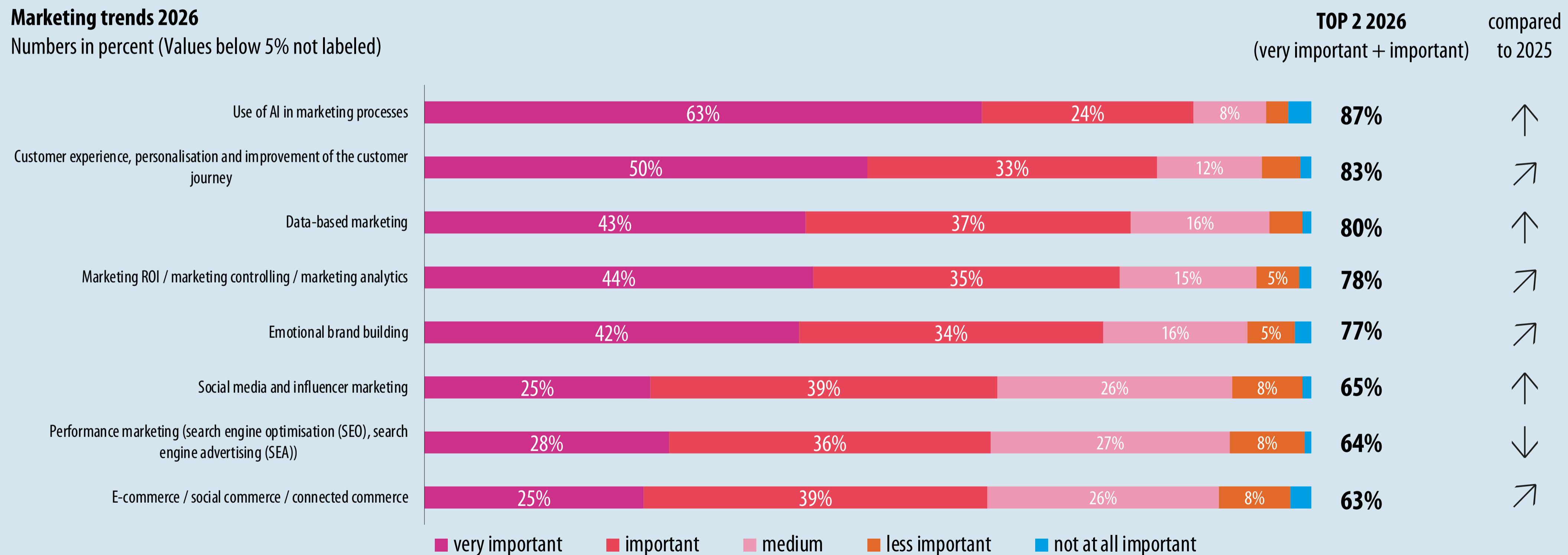


GLOBAL FINDINGS: NAIL THE BASICS. PROVE THE IMPACT.

No excuses: Marketing must deliver results – the more effective and efficient, the better. And success depends on implementing AI the right way.

Marketing trends 2026

Numbers in percent (Values below 5% not labeled)



Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

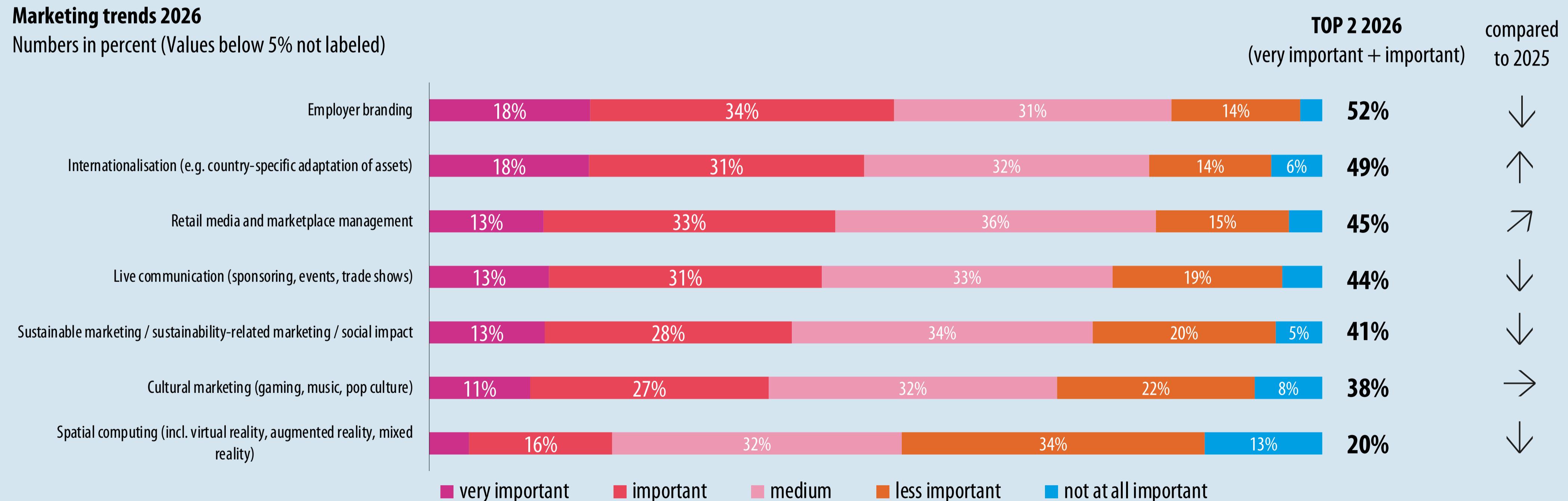
TOP 2: Summary of categories 1 - Very Important and 2 - Somewhat Important.

GLOBAL FINDINGS: BASICS BEFORE BUZZ.

Specific topics remain specific – the basics need to be done first. Once those are covered, CMOs can focus on the extras and niche themes, with sustainability now among them.

Marketing trends 2026

Numbers in percent (Values below 5% not labeled)



Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

TOP 2: Summary of categories 1 - Very Important and 2 - Somewhat Important.

GLOBAL FINDINGS: NEARLY UNITED IN THE NICHE

Spatial computing? Not a top priority – the only point of agreement. Beyond that, views on specific topics split: e.g. sustainability ranks higher in the Netherlands, and cultural marketing gains attention in the Middle East.

Marketing trends 2026: Highest ranks sorted by the top 2 values (very important + important)

Numbers in percent (Values below 5% not labeled)

	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n=107)	ES (n=38)	FR (n= 32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Employer branding	53%	61%	54%	36%	59%	39%	56%	55%	38%	59%	32%	52%
Internationalisation (e.g. country-specific adaptation of assets)	50%	39%	39%	50%	57%	50%	53%	40%	62%	63%	37%	49%
Retail media and marketplace management	49%	33%	33%	50%	50%	55%	50%	49%	34%	55%	42%	45%
Live communication (sponsoring, events, trade shows)	46%	56%	44%	29%	52%	39%	31%	46%	38%	48%	21%	44%
Sustainable marketing / sustainability-related marketing / social impact	27%	44%	35%	43%	61%	53%	50%	47%	34%	45%	37%	41%
Cultural marketing (gaming, music, pop culture)	43%	33%	24%	33%	38%	34%	31%	41%	45%	57%	42%	38%
Spatial computing (incl. virtual reality, augmented reality, mixed reality)	15%	17%	20%	17%	28%	45%	19%	18%	11%	30%	16%	20%

=Lowest Top 2 value
=Second lowest Top 2 value

Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

*Evaluation is not representative due to the small number of responses.

GLOBAL FINDINGS: AI EVERYWHERE?

AI dominates across most markets or ranks among the top two priorities. The UK stands out for a different reason – AI seems to be already business as usual.

Marketing trends 2026: Highest ranks sorted by the top 2 values (very important + important)

	DE (n=192)	AT (n=28)	CH (n=153)	BELUX (n=42)	NE (n=107)	ES (n=38)	FR (n=32)	IT (n=91)	UK (n=47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Use of AI in marketing processes	91%	94%	84%	81%	91%	87%	84%	77%	85%	93%	89%	87%
Customer experience, personalization and improvement of the customer journey	84%	78%	86%	76%	82%	71%	88%	75%	87%	89%	89%	83%
Data-based marketing	82%	89%	80%	81%	77%	76%	84%	69%	79%	89%	79%	80%
Marketing ROI / marketing controlling / marketing analytics	83%	72%	70%	81%	79%	76%	72%	74%	89%	91%	74%	78%
Emotional brand building	86%	94%	70%	74%	70%	76%	81%	68%	79%	79%	74%	77%
Social media and influencer marketing	73%	83%	54%	52%	66%	61%	72%	49%	70%	77%	79%	65%
Performance marketing (search engine optimisation (SEO), search engine advertising (SEA))	59%	83%	67%	57%	64%	63%	69%	58%	66%	71%	74%	64%
E-commerce / social commerce / connected commerce	66%	83%	61%	64%	61%	63%	59%	49%	57%	86%	74%	63%

=Highest Top 2 value
=Second highest Top 2 value

Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

*Evaluation is not representative due to the small number of responses.



How important do you think the following marketing trends will be in 2026?

GLOBAL FINDINGS ACROSS MARKETS

The Middle East plays a special role in cultural marketing: more than half of all CMOs (57%) consider the topic to be relevant.

The topic of sustainability is shrouded in uncertainty: in the Netherlands, 61% consider it to be important or very important, compared to 27% in Germany.

Internationalization is most important to CMOs in Middle East (63%) and UK (62%).

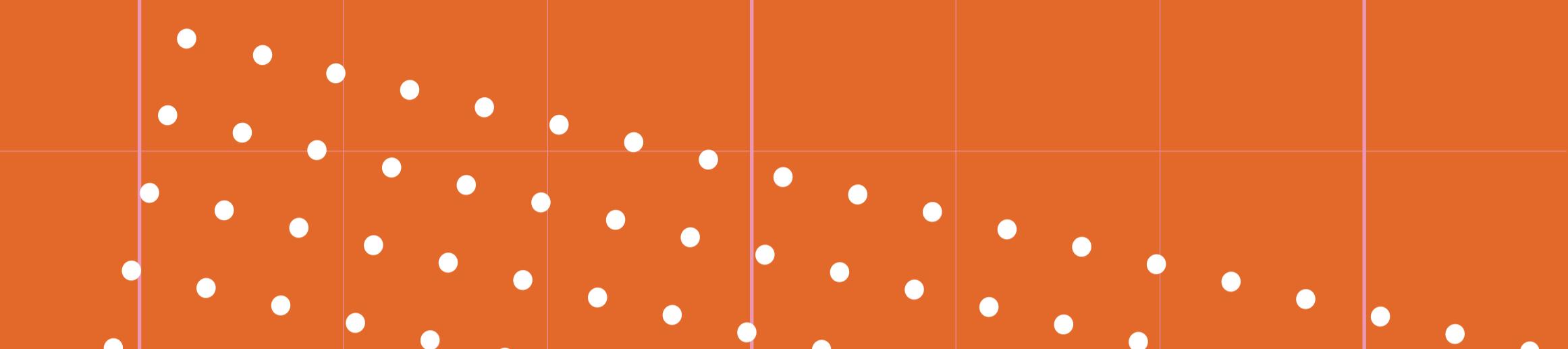
Italy's figures are comparatively low: E.g. a first-place response of 77% would not even place in the top three in many other countries.

In Austria (56%) and the Netherlands (52%), half of all CMOs consider live communication to be important or very important.

Of all the countries, Switzerland, France and the UK were the only ones where AI was not the most frequently mentioned topic.

Spanish CMOs rate spatial computing higher than those in any other country: Almost half of them consider it relevant.

In Austria, emotional brand building is as important as the use of AI in marketing processes (94%).

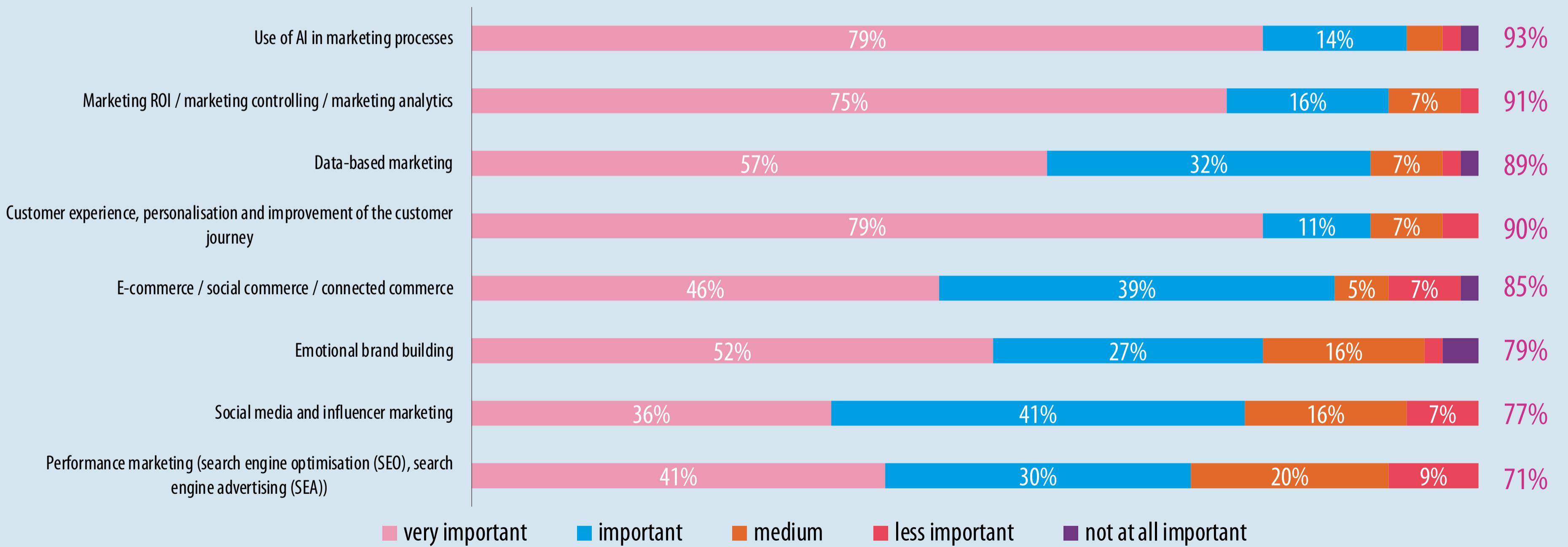


AI AND ROI TAKE CENTRE STAGE REGIONALLY AS CMOS ELEVATE CUSTOMER EXPERIENCE

Marketing trends 2026

Numbers in percent (Values below 5% not labeled)

TOP 2
2026



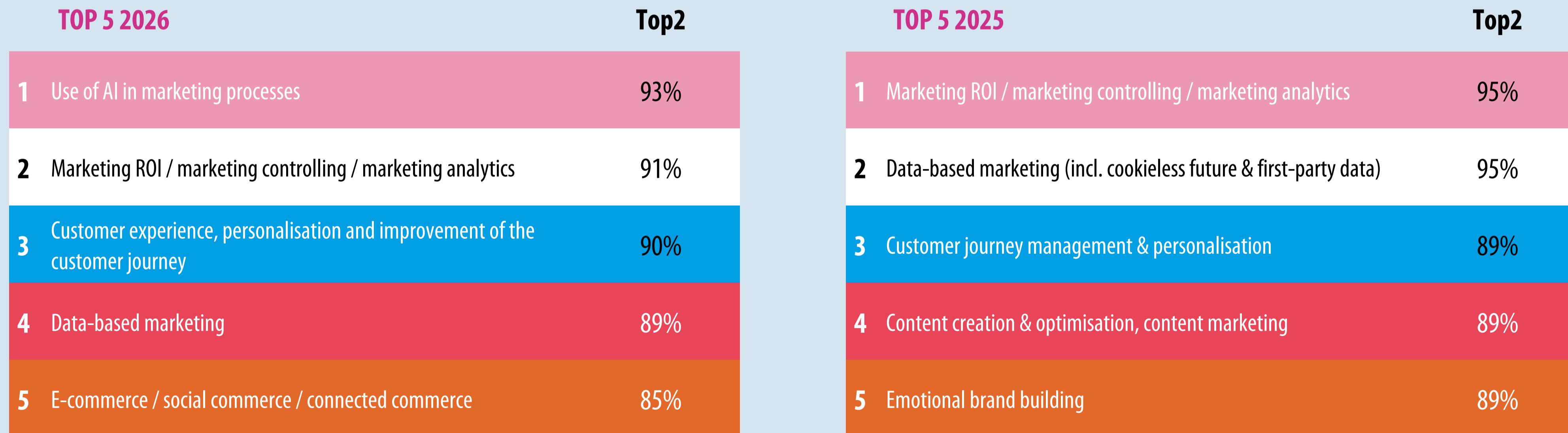
Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 56

TOP 2: Summary of categories 1 – Very Important and 2 - Somewhat Important.

USE OF AI, MARKETING ROI & CUSTOMER EXPERIENCE LEAD 2026 TRENDS IN THE MIDDLE EAST

Marketing trends 2026

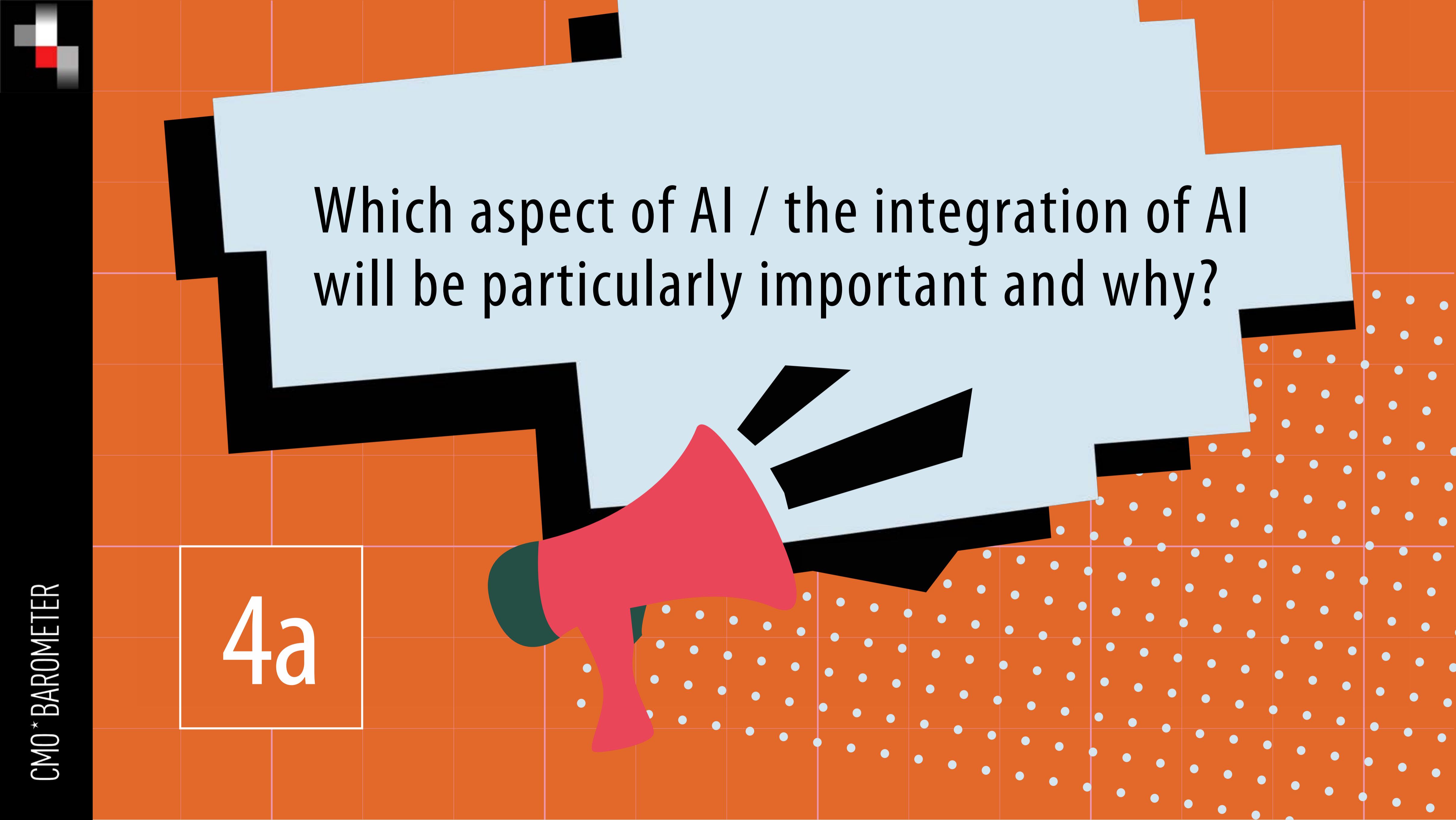
Numbers in percent



Question: How important do you think the following marketing trends will be in 2026? Base: N = 56

TOP 2: Summary of categories 1 – Very Important and 2 - Somewhat Important





Which aspect of AI / the integration of AI
will be particularly important and why?

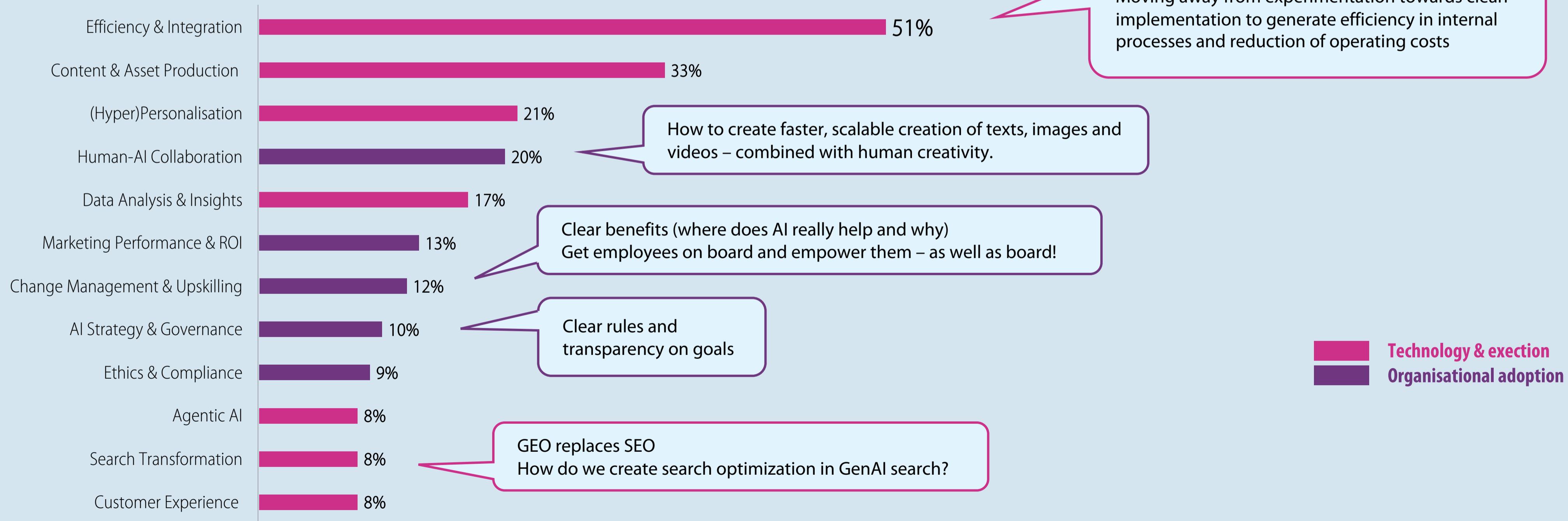
4a

GLOBAL FINDINGS: BALANCING CODING & CARING

CMOs must now deliver on the promise of AI and, to do so, must master both the technical systems and the human needs of customers and colleagues.

Important aspects of AI

Numbers in percent



4b

Which aspect of social media will be particularly important and why?

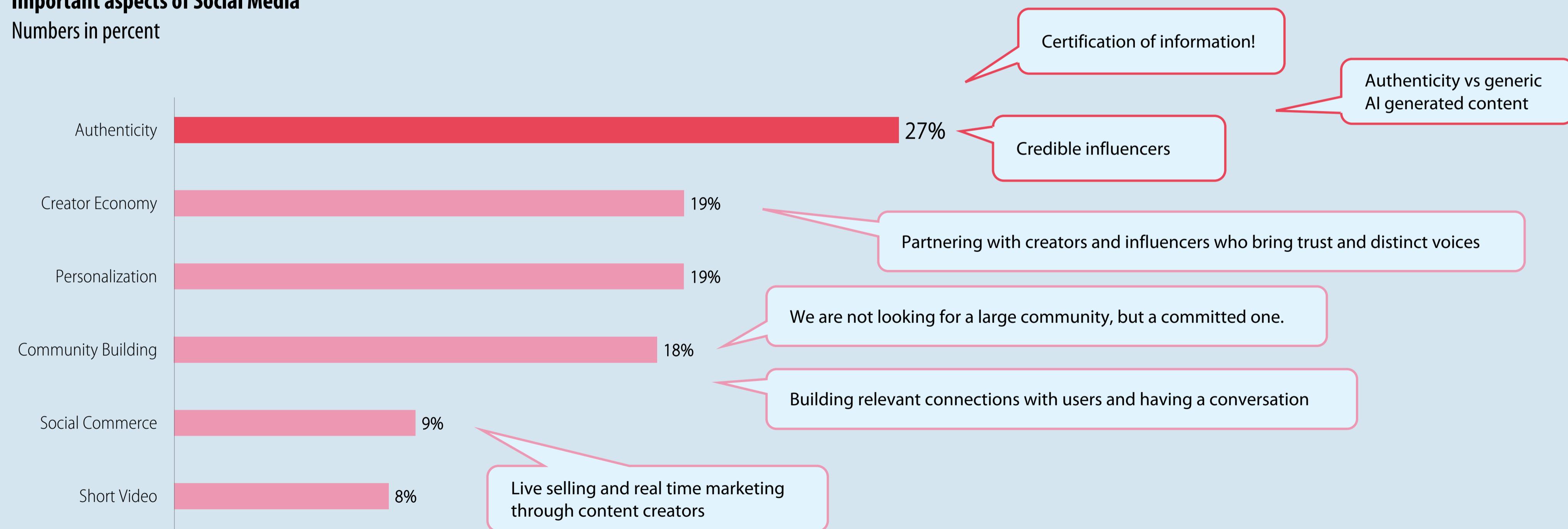


GLOBAL FINDINGS: REACH IS OVER!

Fake won't work: Authenticity is key and more a survival factor than "nice to have". But the main question remains: How, where and by which means tools will we be perceived as genuine by the right people?

Important aspects of Social Media

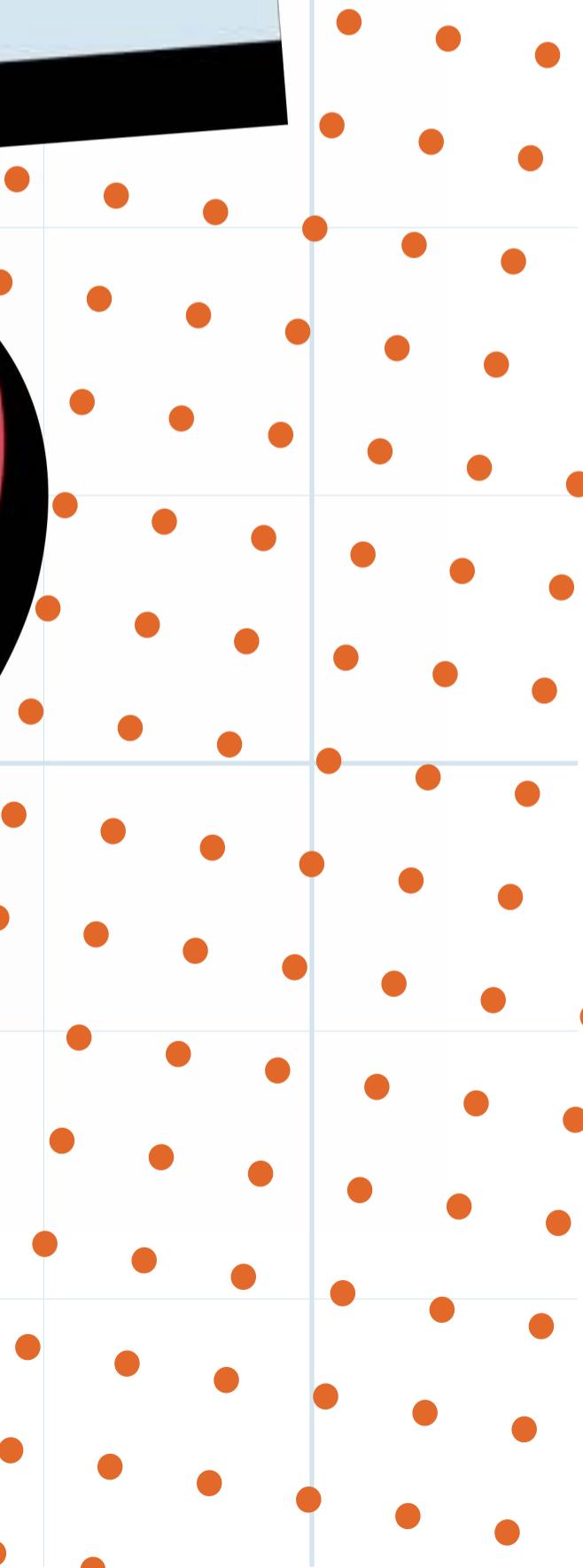
Numbers in percent



Question: Which aspect of social media will be particularly important and why? Base: N = 523 (Social media and influencer marketing are considered "very important" or "important")

5

What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?

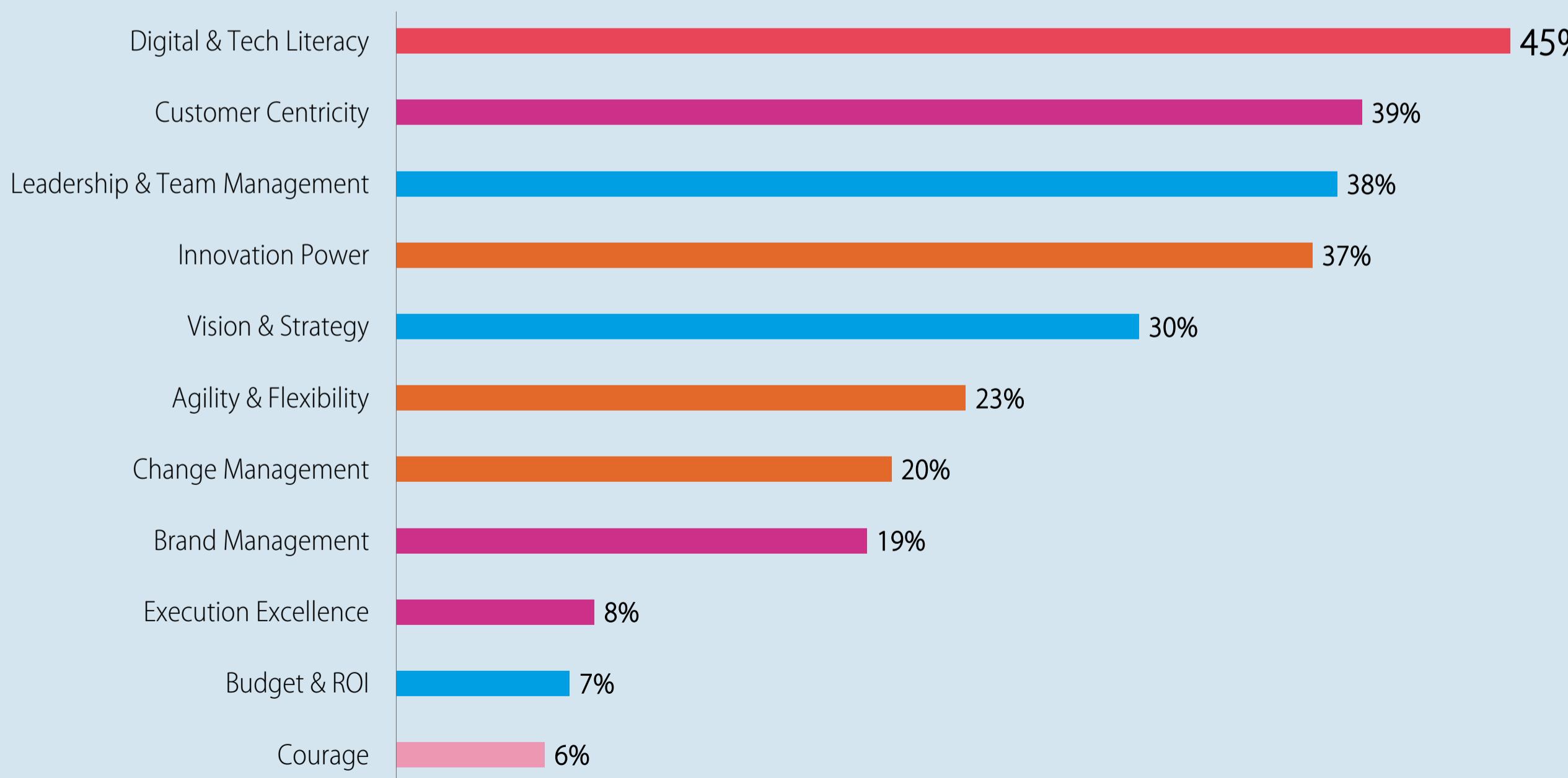


GLOBAL FINDINGS: AI IS THE BOSS'S BUSINESS!

It's not about specialization, but integration: The true CMO superpower lies in uniting diverse – and often contradictory – skills. By 2026, they see themselves as Chief Transformation Officers.

CMO Superpowers 2026

Derived topic clusters, numbers in percent, multiple mentions possible



Question: What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future? Base: N = 805

Key paradoxes to integrate:

- Living Tech x Showing the Human side
- Speed in Implementation x Stability in Strategy
- Being Creative x Staying Analytical
- Deliver Efficiency x Push Innovation



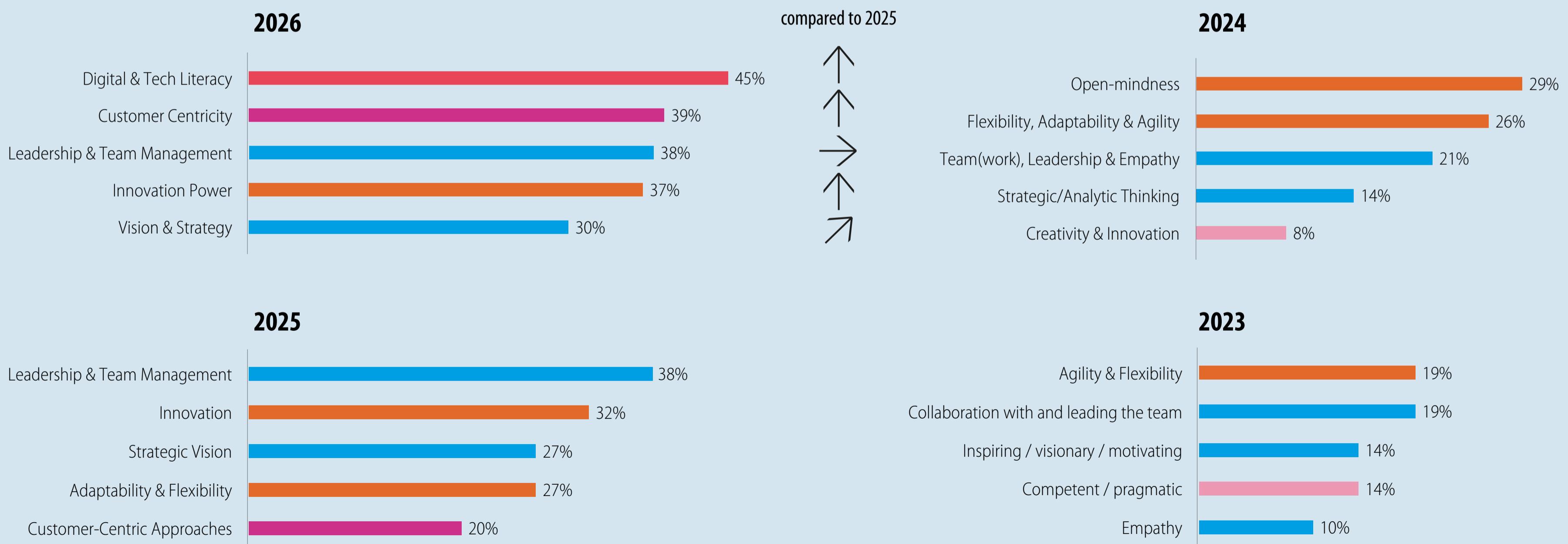


GLOBAL FINDINGS: NO TECH SKILLS? GAME OVER!

Open-mindedness and flexibility have taken a backseat, and even traditional leadership skills are falling victim to the new challenges posed by AI.

CMO Superpowers Top 5

Derived topic clusters, numbers in percent, multiple mentions possible

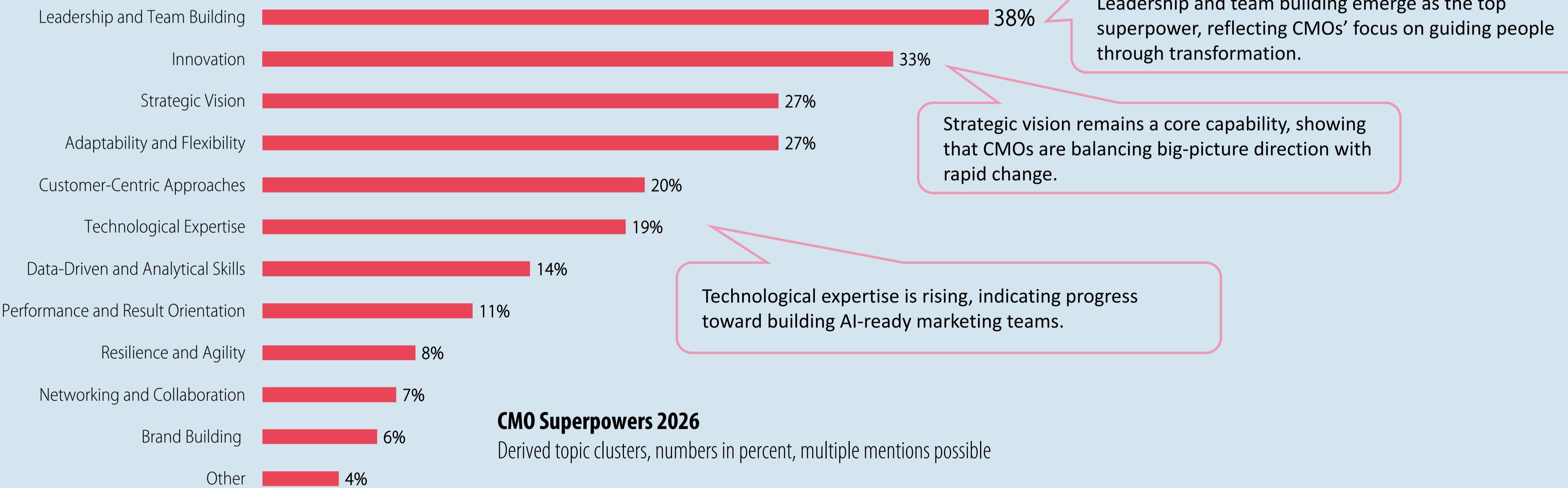


Question: What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future? Base: N = 805

LEADERSHIP AND ADAPTABILITY LEAD THE WAY FOR REGIONAL CMOS

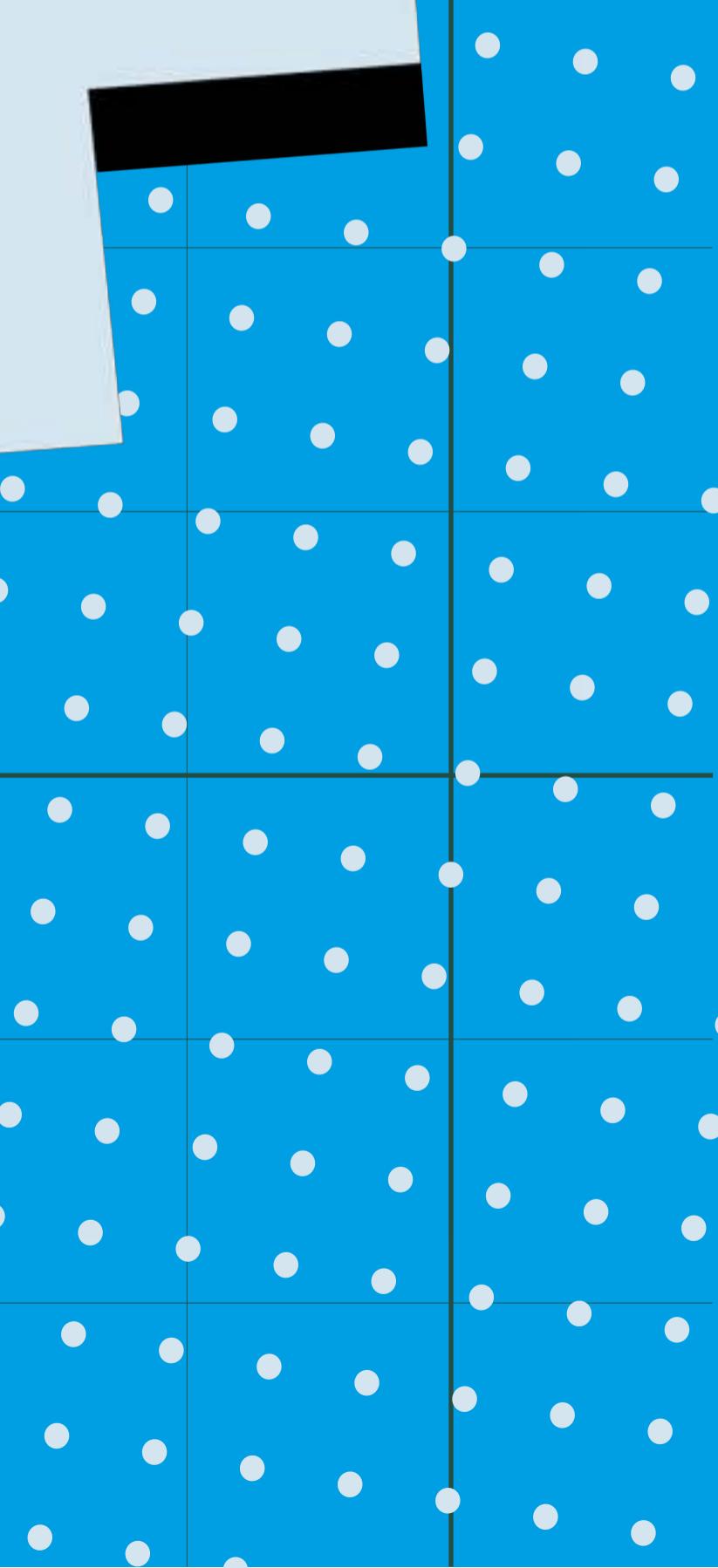
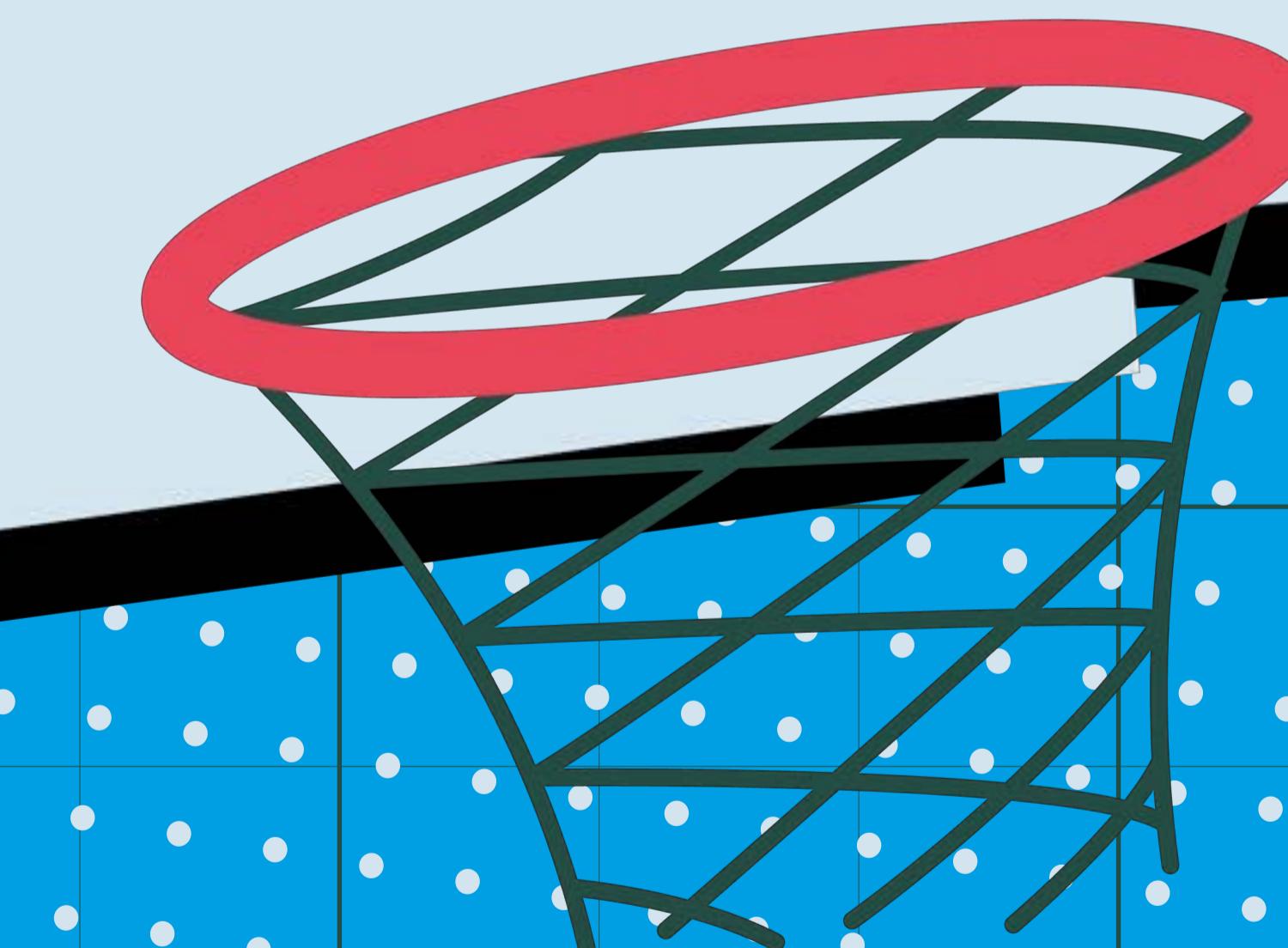


Regional CMOs position their superpowers around leading teams, driving innovation, and setting strategic direction, supported by flexibility and growing AI-related capability.



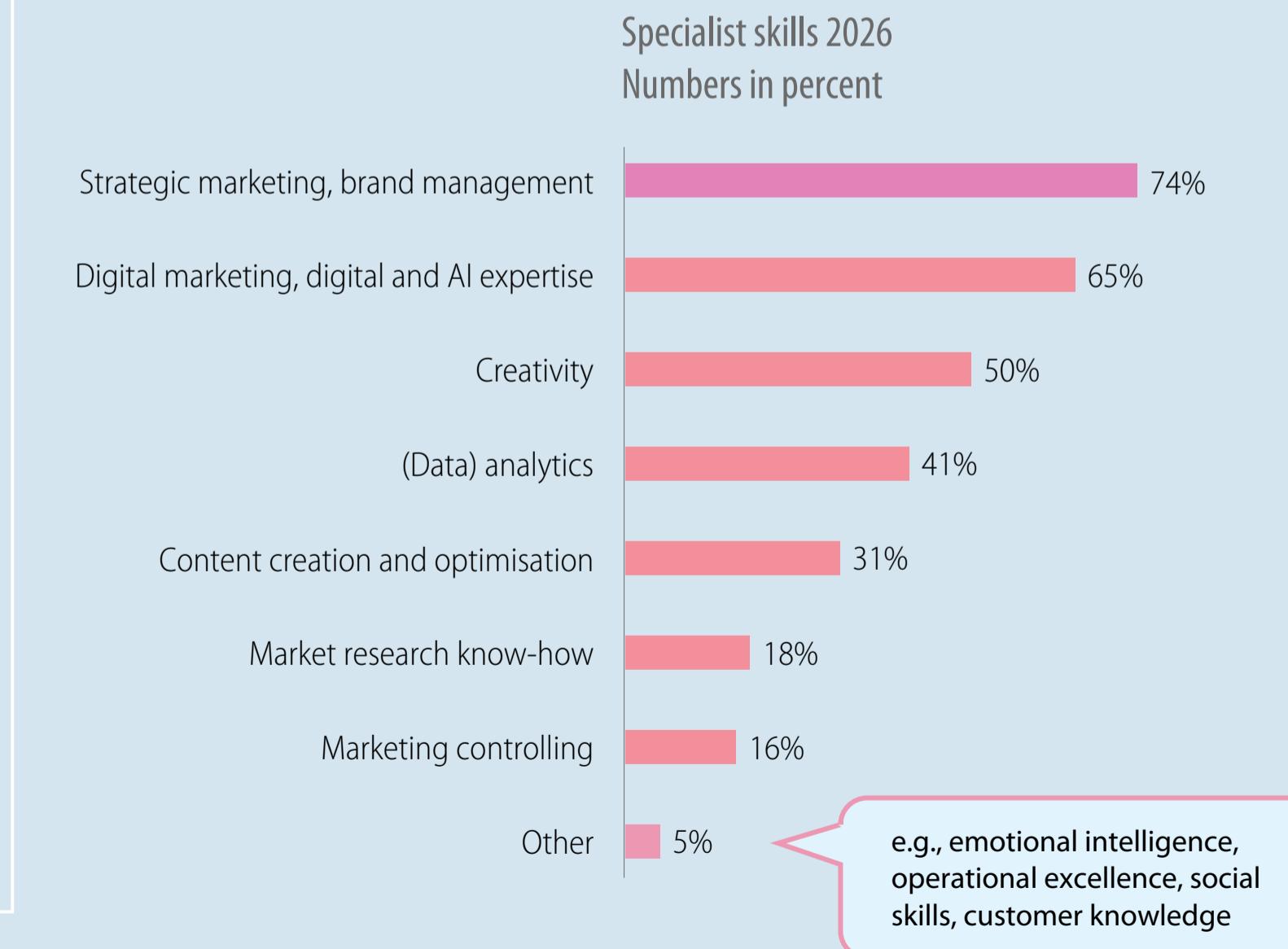
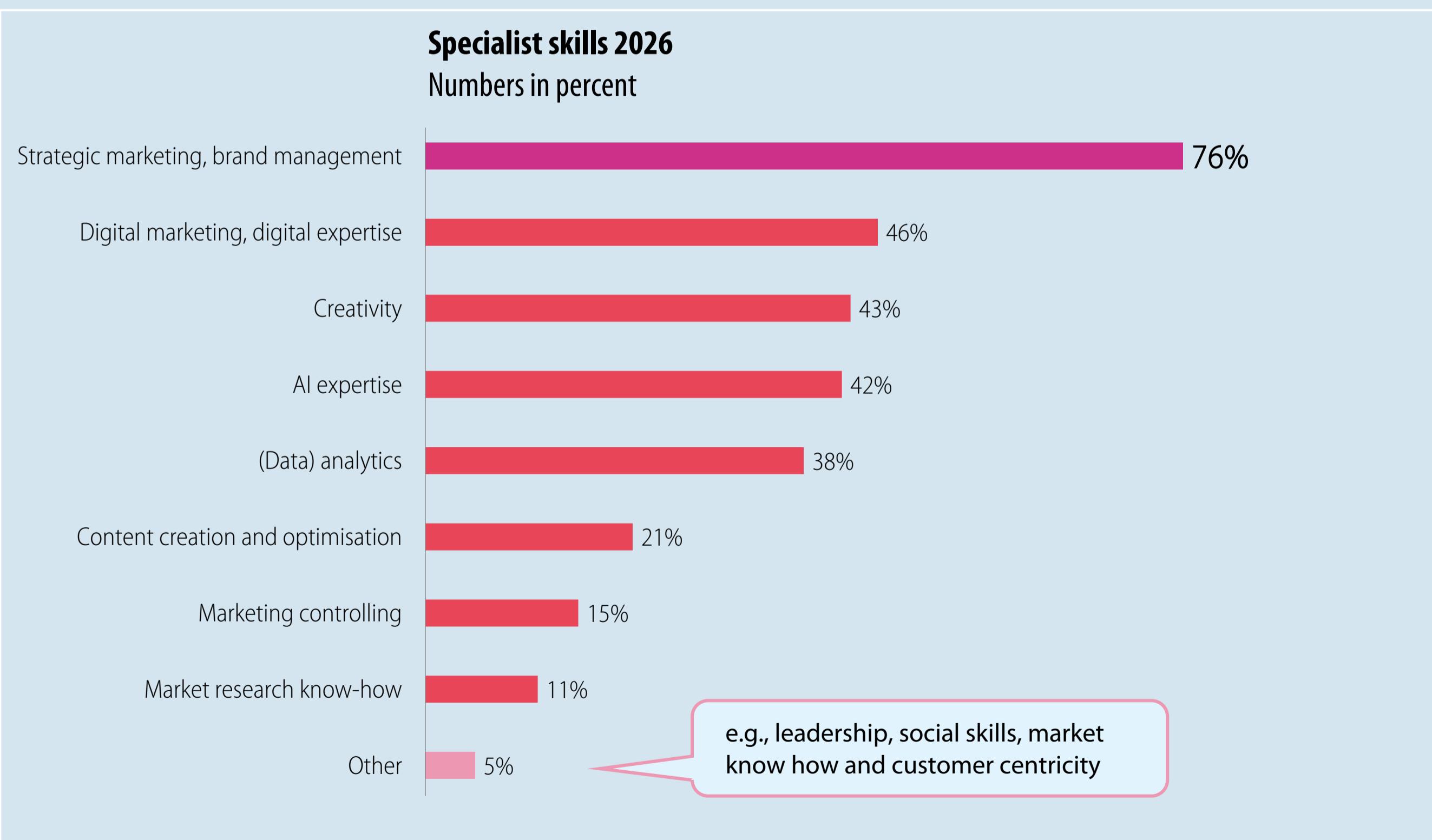
6

Which specialist skills should a successful marketing team have?



GLOBAL FINDINGS: TALK LESS, THINK LONG-TERM!

Strategy and brand now dominate – digital, creativity, and AI skills follow. CMOs are steering away from buzzwords toward real business impact, proving that real transformation begins with substance.

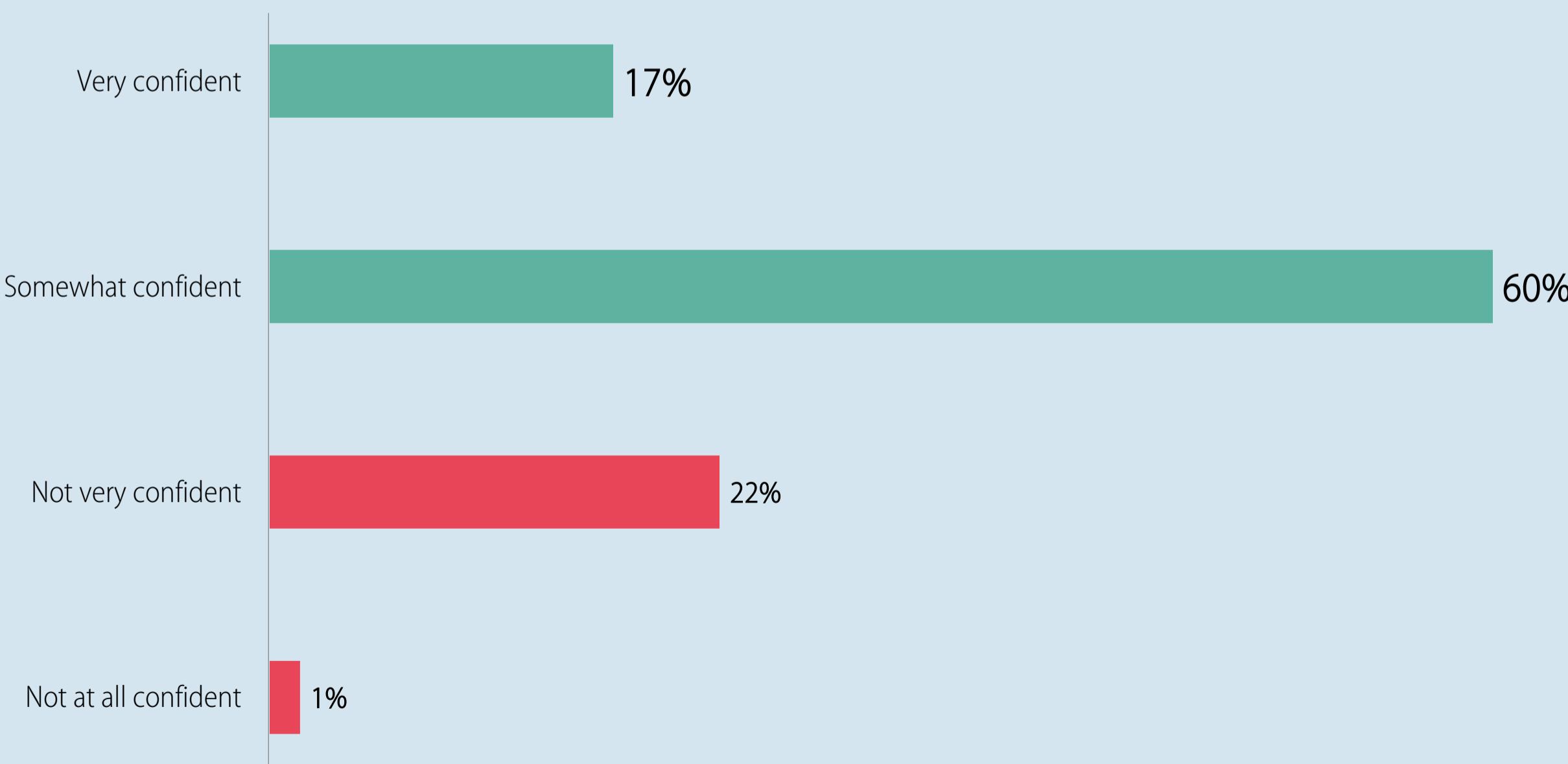


Question: Which specialist skills should a successful marketing team have? Base: N = 805

GLOBAL FINDINGS: FUTURE'S HERE. SO IS THE TEAM?

The majority of CMOs are satisfied with their team – more or less. Only 17% are confident that they are prepared for the next three years, and one in five are even concerned.

Confidence in the team skills in the next three years
Numbers in percent



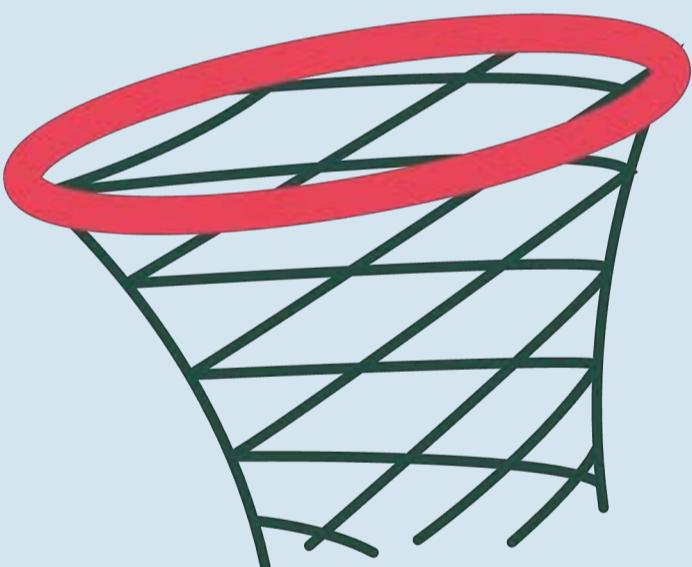
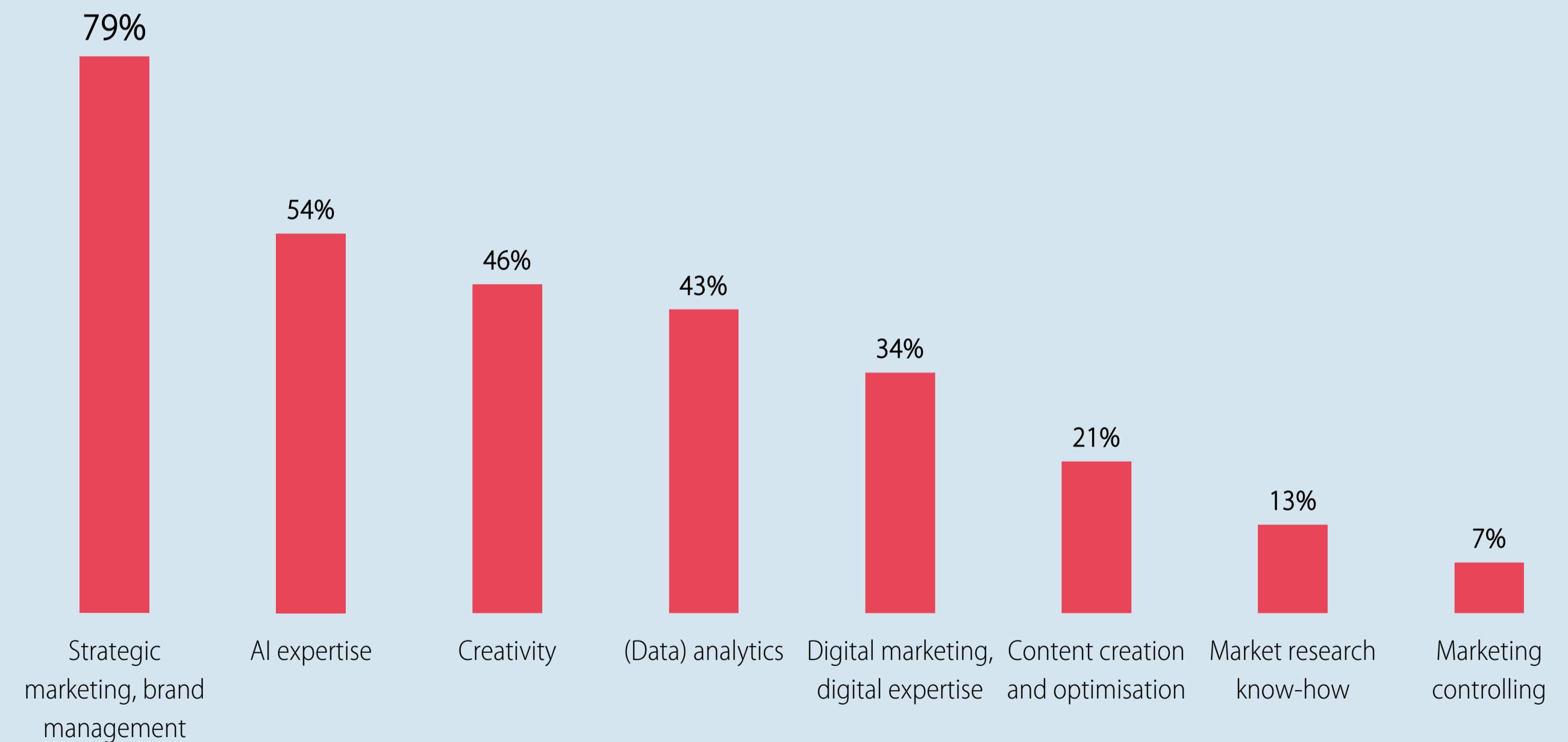
Question: How confident are you that your marketing team has the right skills to be successful in the next two to three years? Base: N = 805



REGIONALLY, STRATEGIC MARKETING IS KEY TO MARKETING TEAM SUCCESS

Specialist skills 2026

Numbers in percent, Top 3 answers



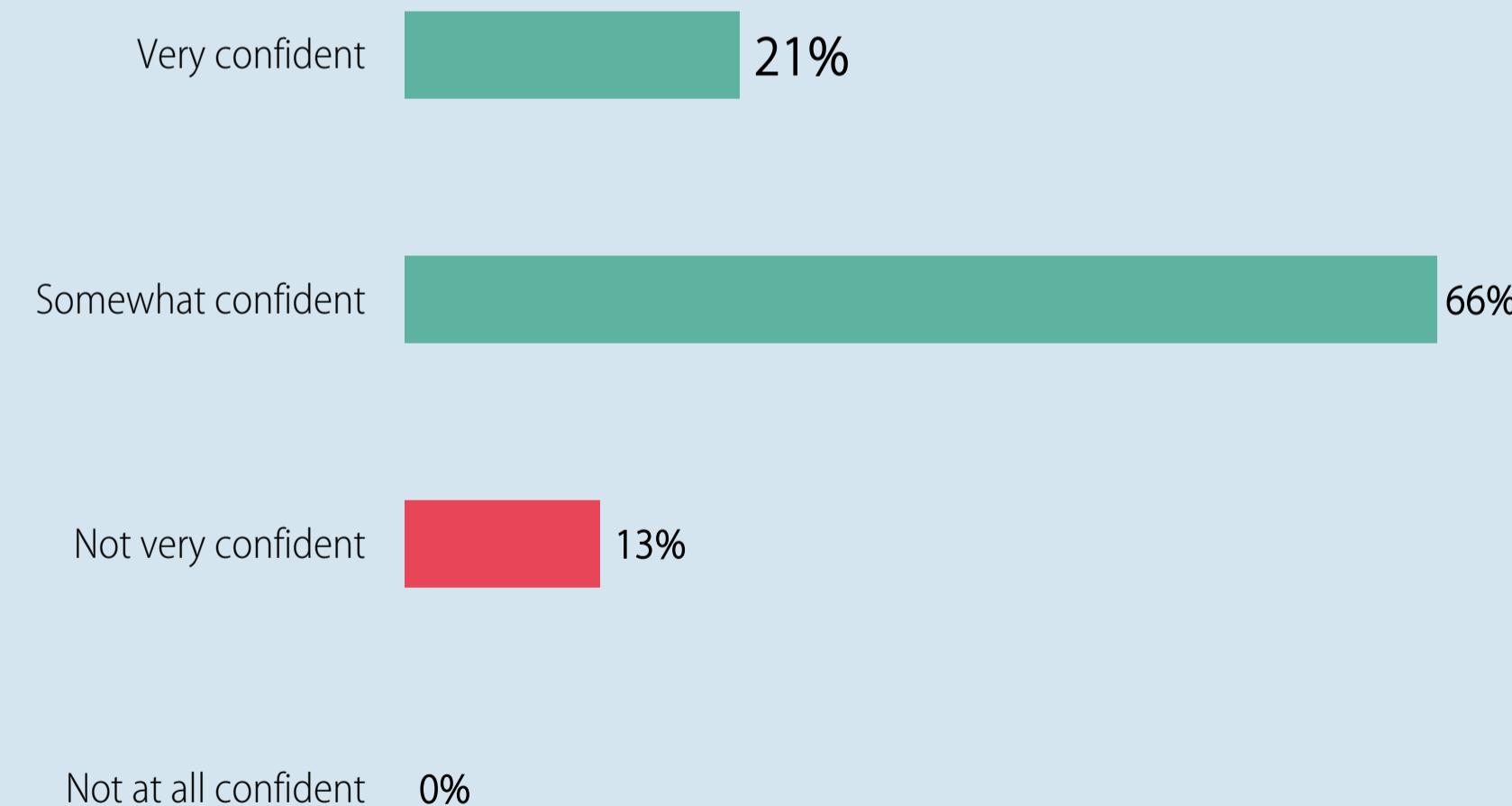
REGIONAL CMOs ARE CONFIDENT IN THEIR TEAM SKILLS



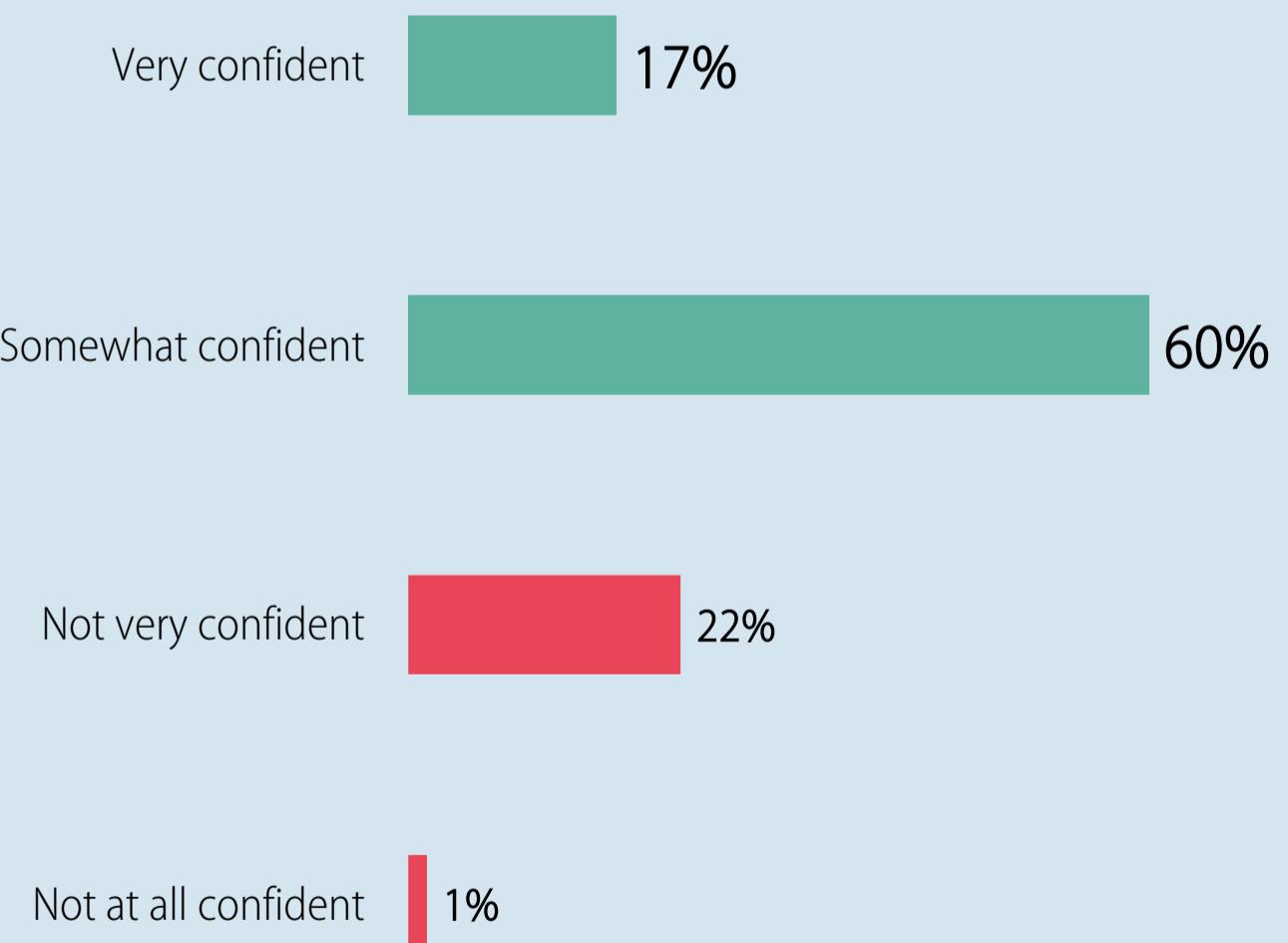
Confidence is higher among Middle Eastern CMOs

Confidence in the team skills in the next three years

Numbers in percent



Global Findings indicate slightly lower levels of confidence



Question: How confident are you that your marketing team has the right skills to be successful in the next two to three years? Base: N = 56 vs. N = 805

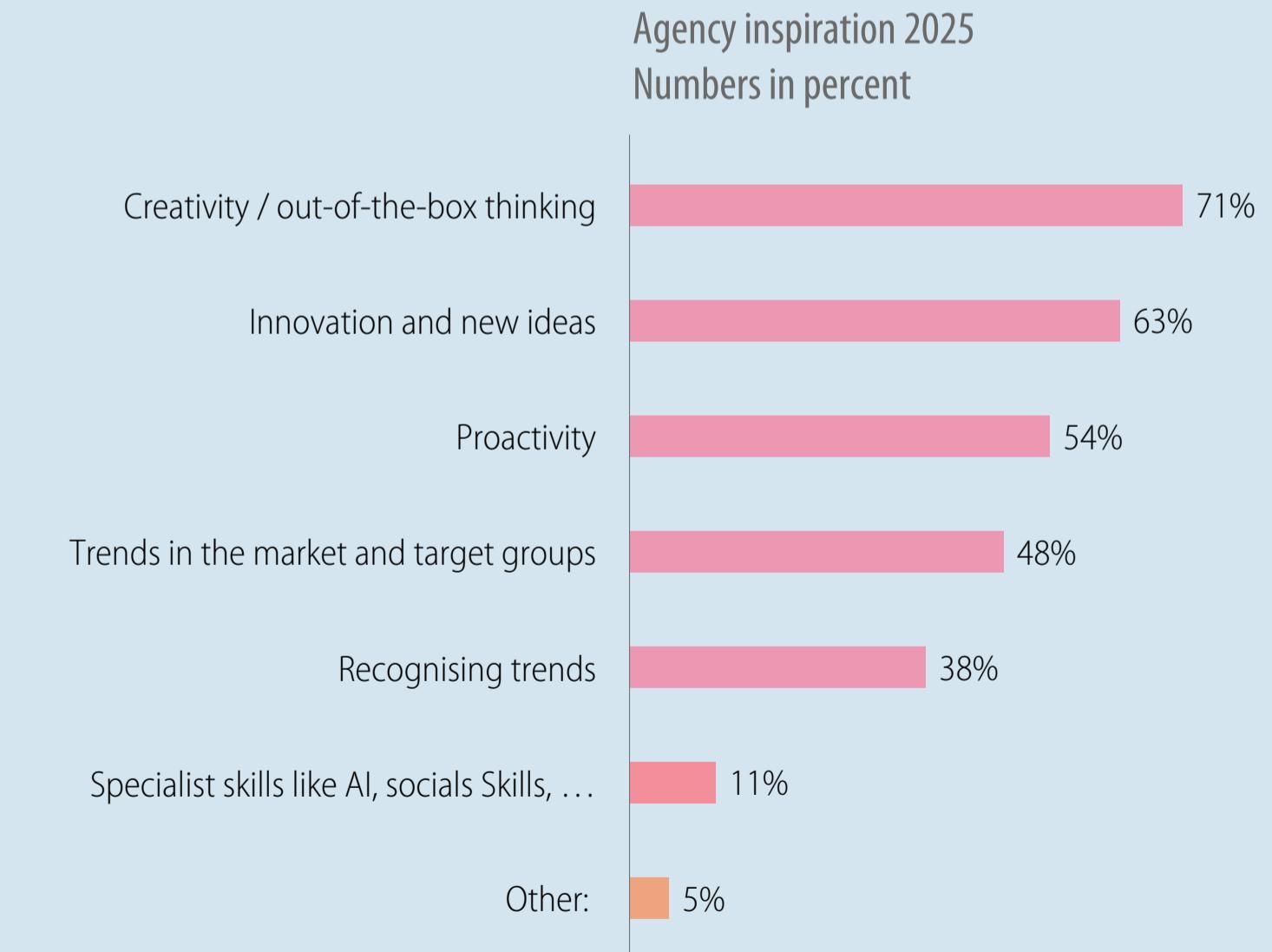
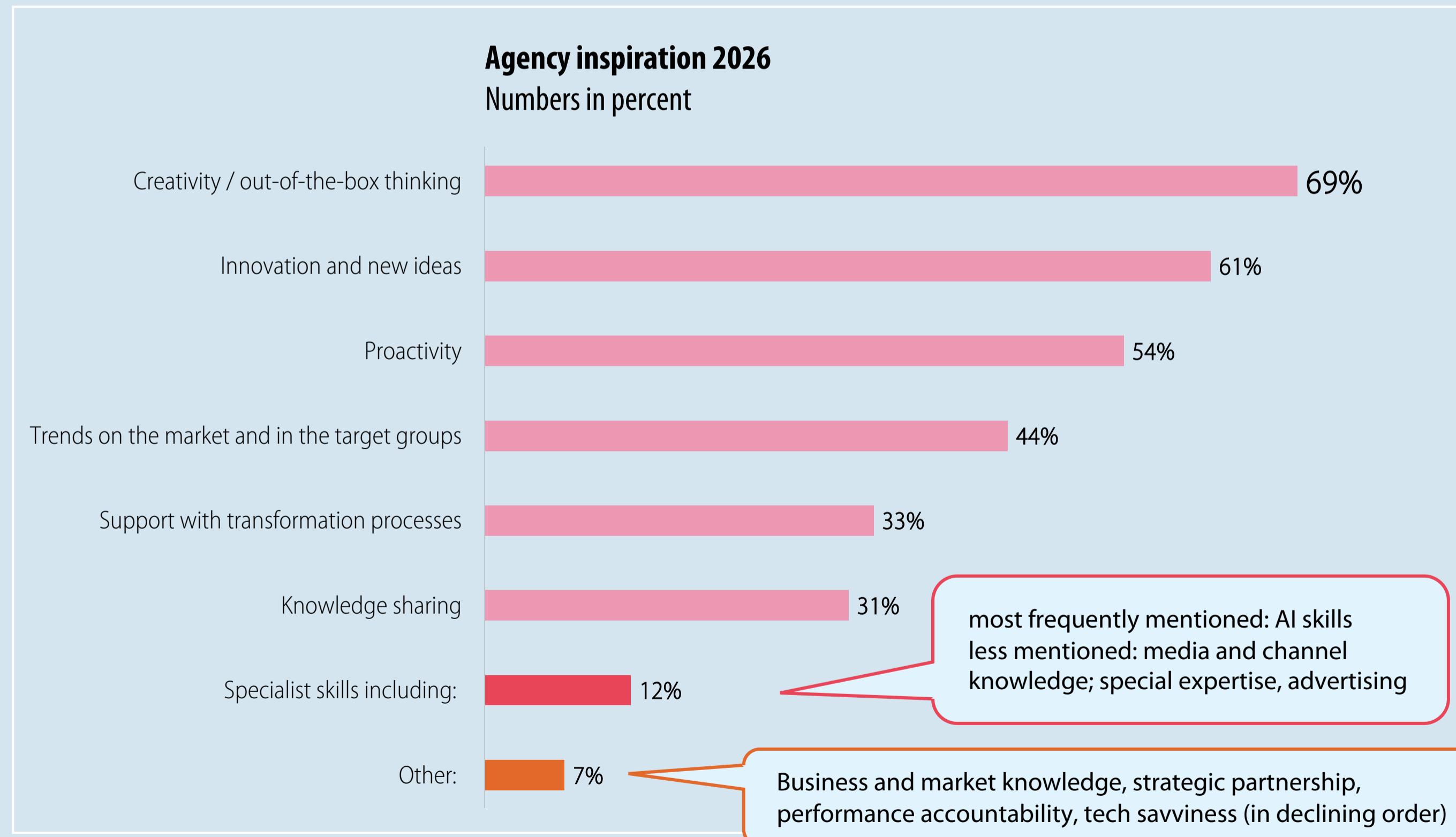
7

What kind of inspiration do you expect from
your agency partners in the future?



GLOBAL FINDINGS: ORIGINALITY NEVER GETS OLD!

The brief hasn't changed: be bolder, think fresher, act first. CMOs still expect agencies to lead that way – maybe because AI doesn't think out-of-the-box? But now, one in three CMOs expects transformation support on top.



Question: What kind of inspiration do you expect from your agency partners in the future? Base: N = 805

GLOBAL FINDINGS: UNITED BY CREATIVITY.

Despite all the challenges posed by AI, CMOs across markets speak with one voice: out-of-the-box thinking, innovation, and proactivity remain the universal must-haves – or are these the very things AI can't do?

Agency inspiration 2025: Highest ranks sorted by the top 2 values (very important + important)

Numbers in percent

	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n=107)	ES (n=38)	FR (n= 32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Creativity / out-of-the-box thinking	71%	61%	71%	69%	58%	63%	84%	70%	64%	73%	58%	69%
Innovation and new ideas	62%	78%	63%	57%	56%	61%	63%	51%	72%	68%	63%	61%
Proactivity	56%	61%	40%	57%	46%	63%	75%	58%	62%	68%	42%	54%
Trends on the market and in the target groups	48%	56%	48%	31%	35%	21%	41%	46%	55%	52%	37%	44%
Support with transformation processes	35%	22%	27%	43%	23%	47%	38%	35%	36%	34%	37%	33%
Knowledge sharing	25%	28%	29%	36%	33%	18%	38%	23%	57%	43%	32%	31%
Specialist skills	11%	11%	7%	17%	12%	5%	19%	19%	15%	14%	16%	12%
Other	8%	11%	8%	2%	7%	8%	0%	3%	4%	9%	11%	7%

=Highest Top 2 value
=Second highest Top 2 value

Question: What kind of inspiration do you expect from your agency partners in the future? Base: N = 805

*Evaluation is not representative due to the small number of responses.



What kind of inspiration do you expect
from your agency partners in the future?

GLOBAL FINDINGS ACROSS MARKETS

In Spain in particular,
almost half of all CMOs
expect agencies to support
them in the transformation
process (47%).

More than half of CMOs in
Austria, the UK, and the Middle
East consider identifying trends
to be an important or very
important task for agencies.

In France, creativity is
especially important (84%)
compared to other countries
like the Netherlands (58%)
and Nordics (58%).

Proactivity is as important
as creativity in Spain, and
therefore ranks top (63%).

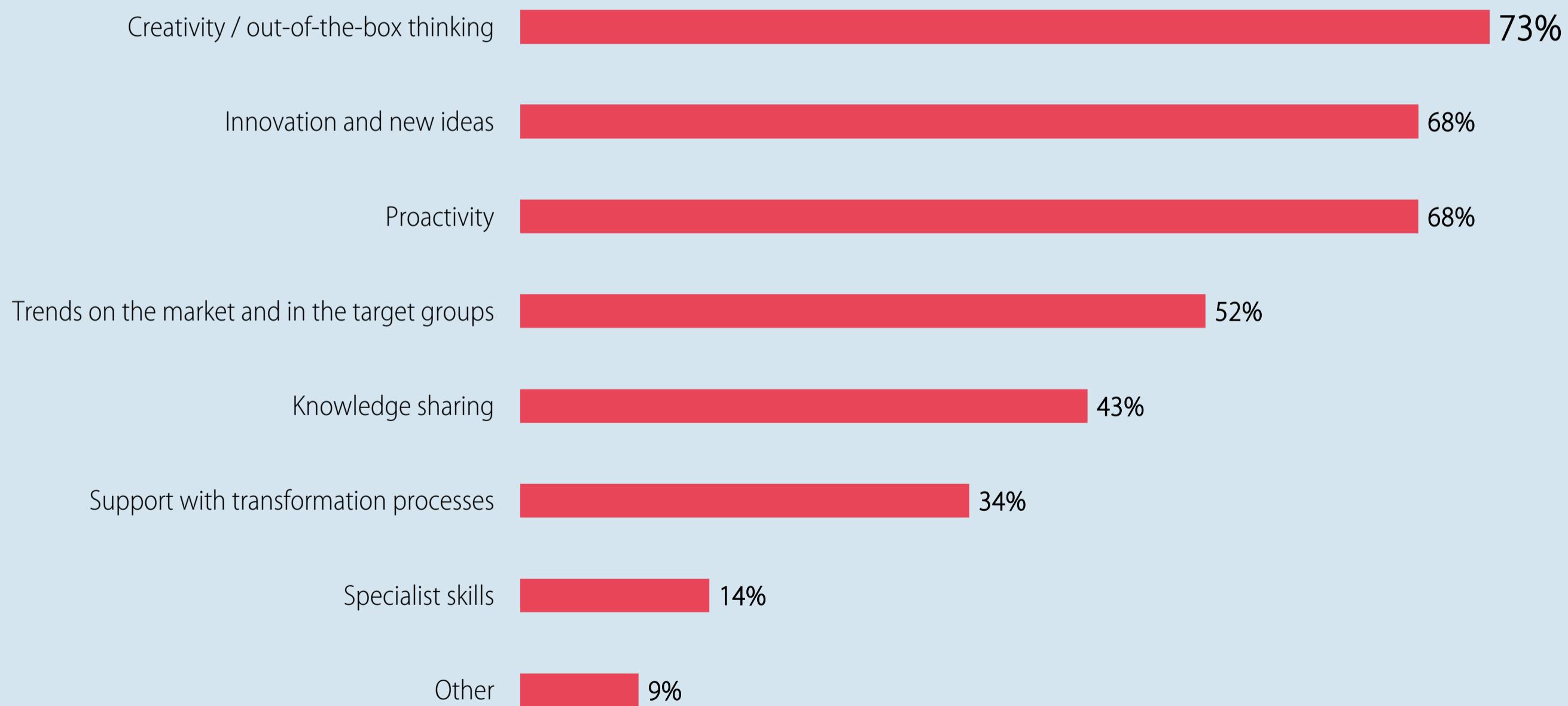
Unlike other countries,
knowledge sharing ranks quite
highly in the UK (57%).

CREATIVITY, NEW IDEAS, PROACTIVITY ARE KEY AGENCY EXPECTATIONS FROM REGIONAL MARKETING TEAMS OF THE FUTURE



Agency inspiration 2026

Numbers in percent

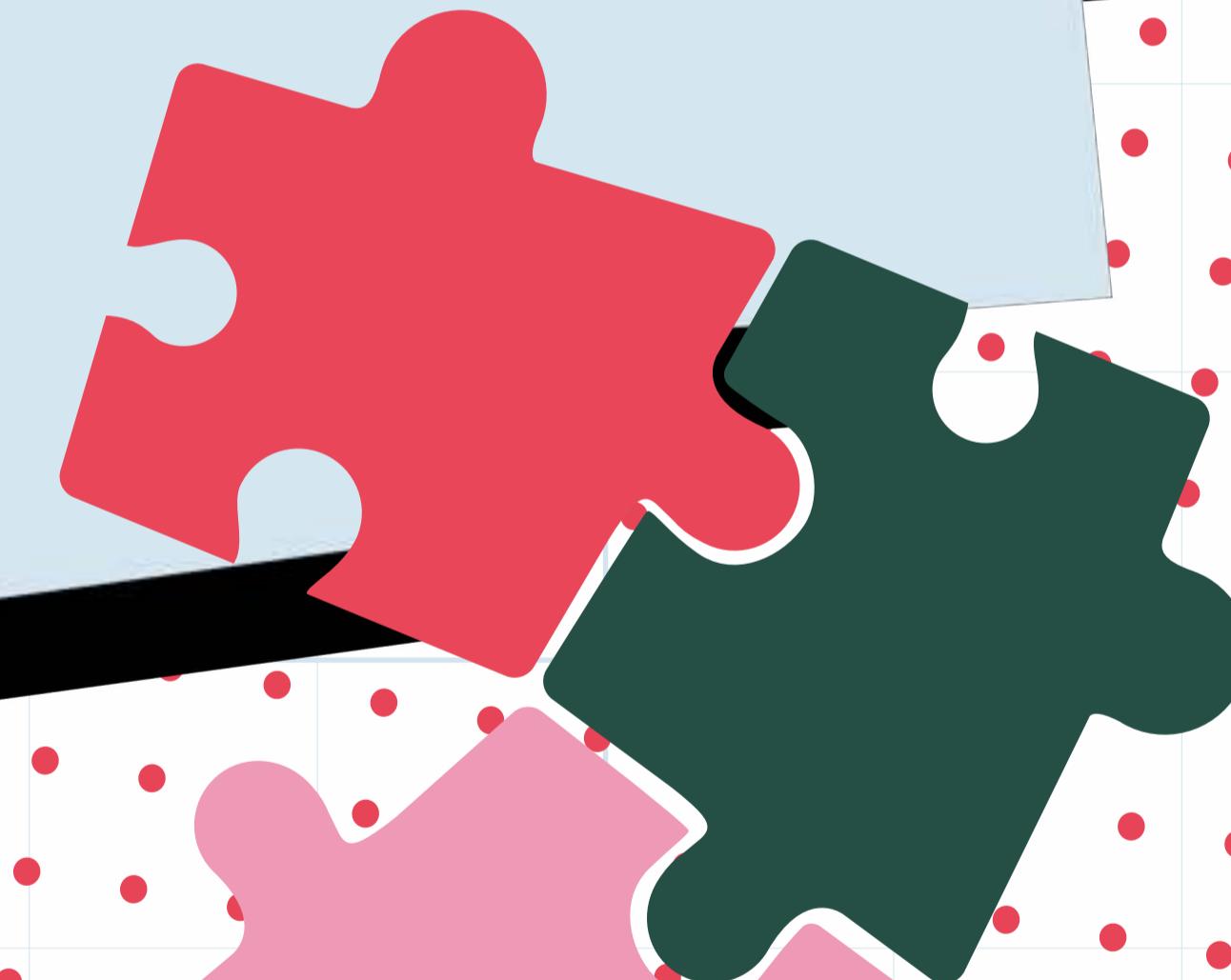


Question: What kind of inspiration do you expect from your agency partners in the future? Base: N = 56

QUESTION

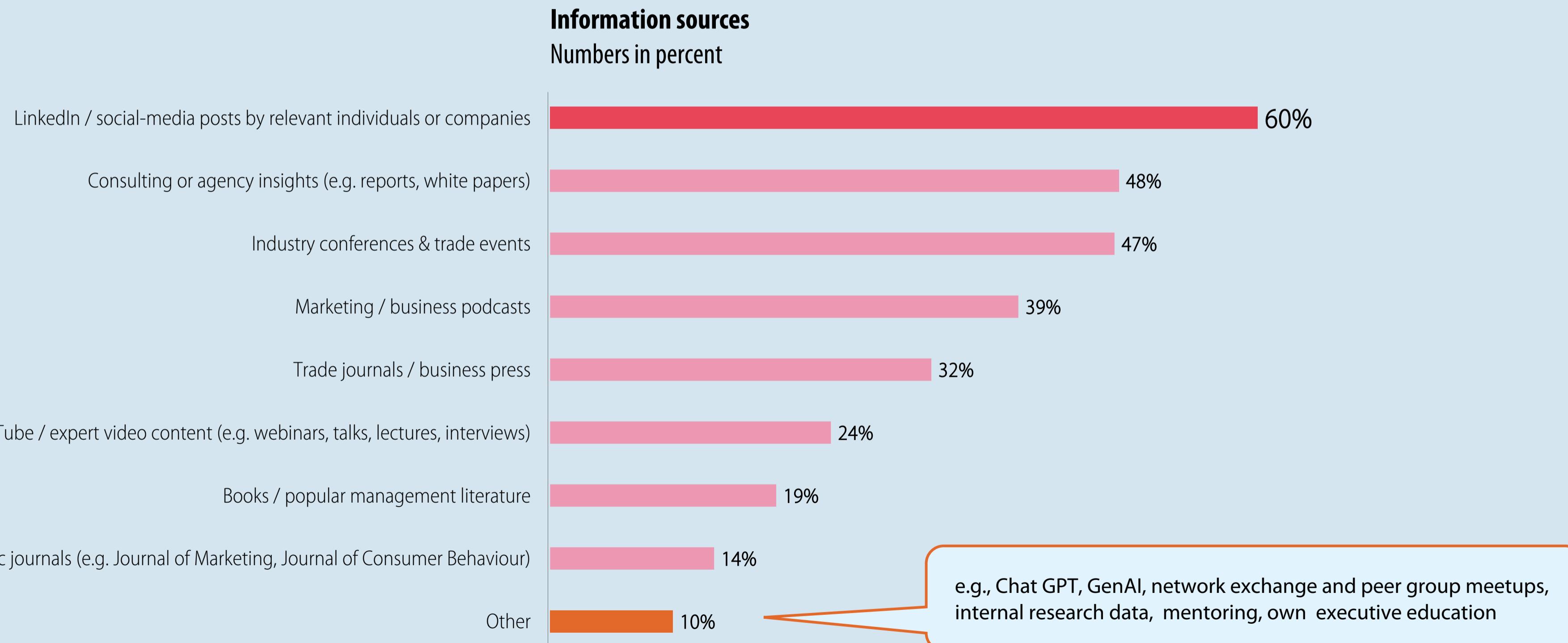
8

Which three sources of information have been most valuable to your professional work in the last 6 months?



GLOBAL FINDINGS: IS AI ONLY ON THEIR AGENDA?

AI could help – if anyone asked. But when it comes to inspiration, CMOs turn to LinkedIn and Social Media first, followed by consulting or agency insights and real-world events.



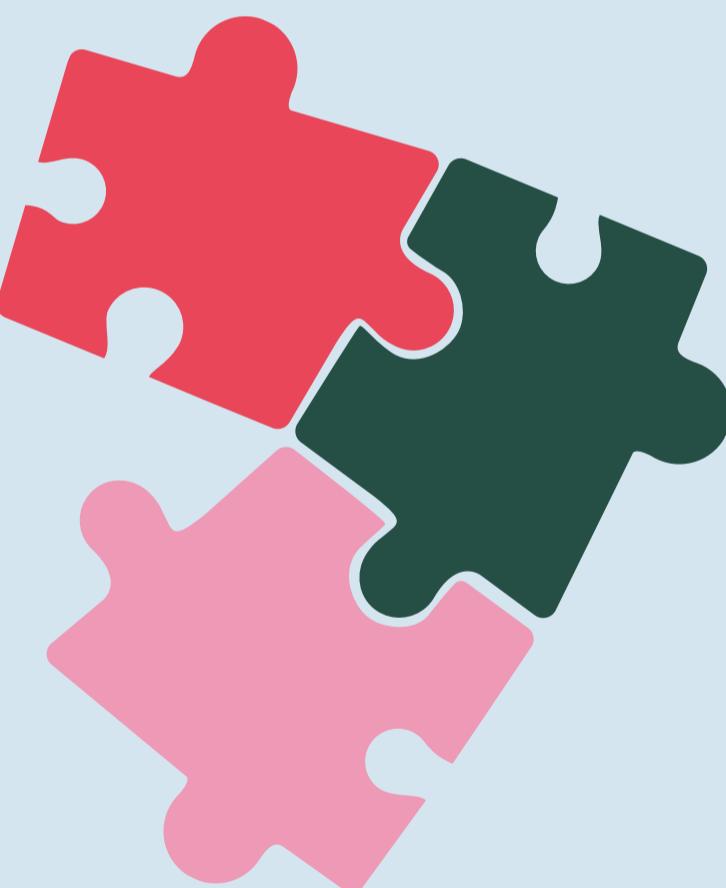
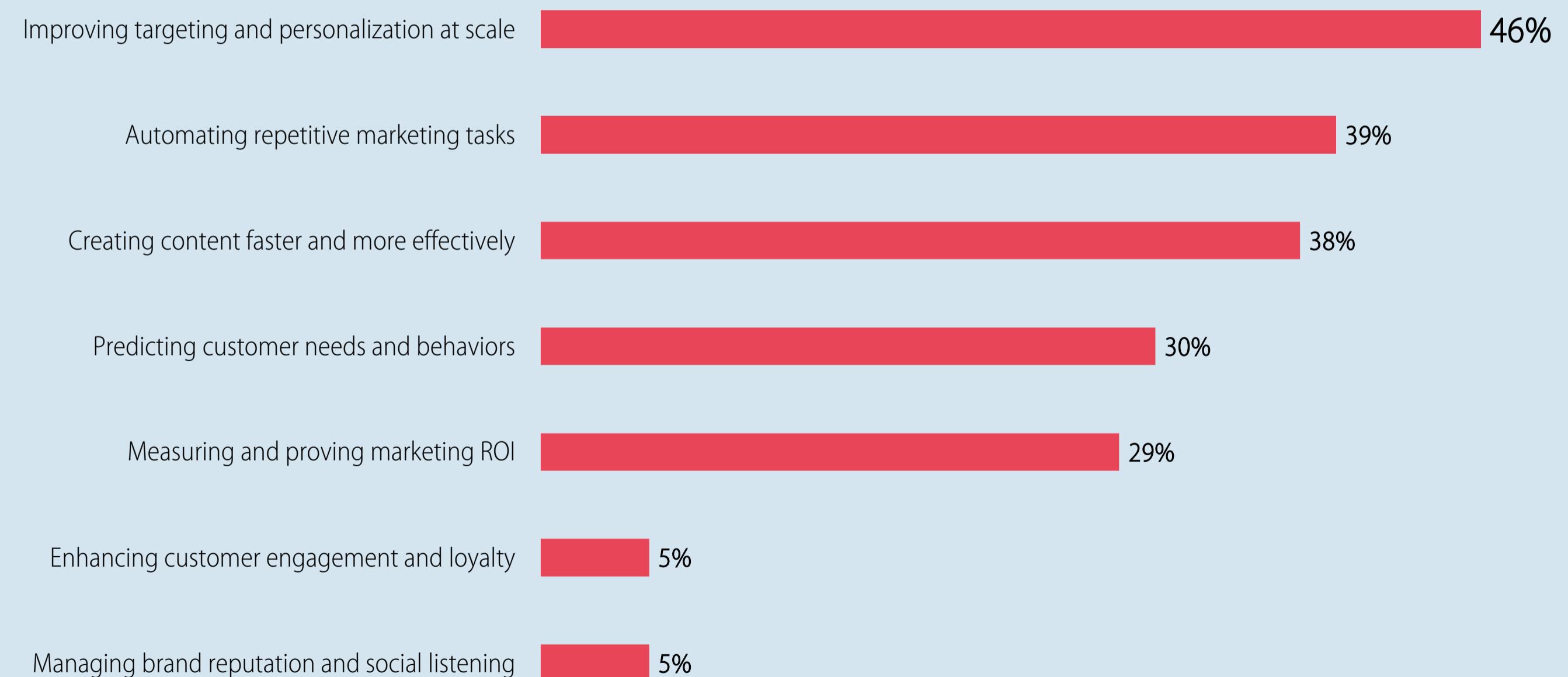
Question: Which three sources of information have been most valuable to your professional work in the last 6 months? Base: N = 805



REGIONALLY, AI BEST HELPS WITH SCALING TARGETING AND PERSONALISATION

Information sources

Numbers in percent



REGIONALLY, SOCIAL MEDIA IS TOP INFORMATION SOURCE



Information sources

Numbers in percent



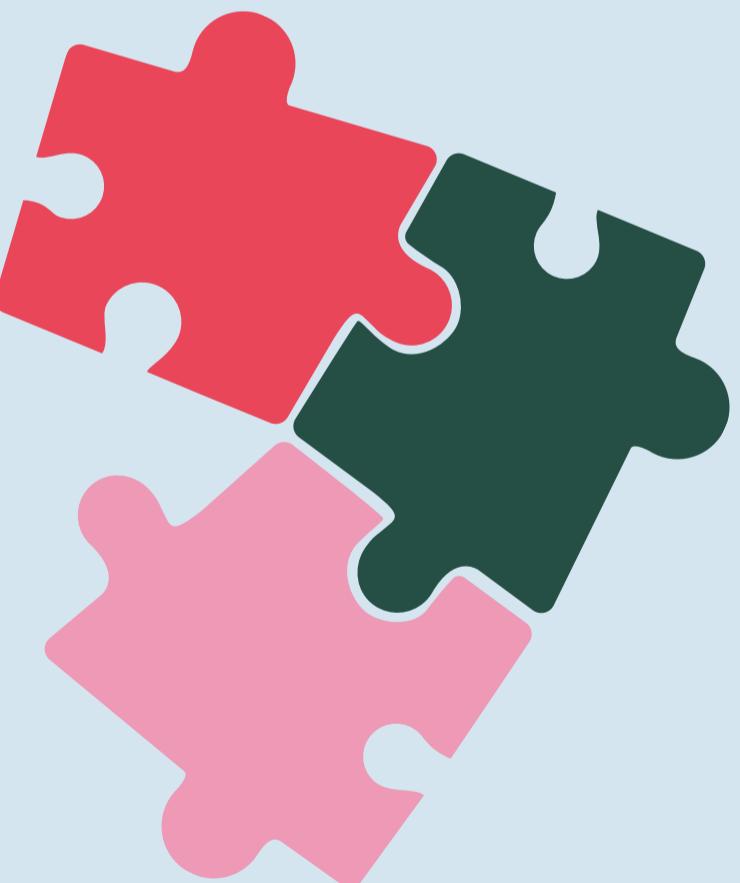
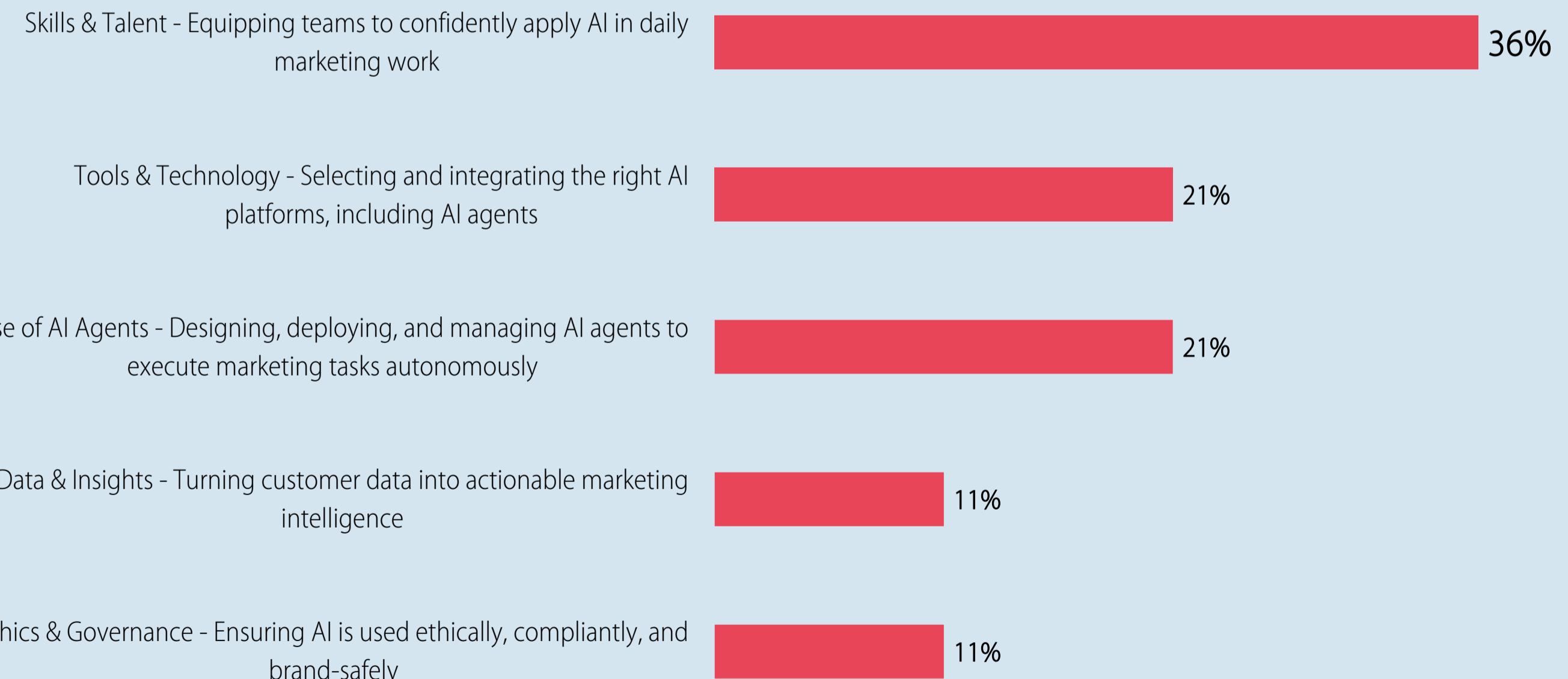
Question: Which three sources of information have been most valuable to your professional work in the last 6 months? Base: N = 56



IN THE MIDDLE EAST, BIGGEST BARRIER IS GETTING TEAMS COMFORTABLE USING AI DAY TO DAY

Information sources

Numbers in percent



Question: Which three sources of information have been most valuable to your professional work in the last 6 months? Base: N = 56

Unique
to the Middle East

THREE LOCAL ADDITIONAL QUESTIONS WERE FIELDDED TO UNDERSTAND THE MARKET EVEN BETTER.

Which marketing challenge would you most want AI to help you solve as a marketer?

9

What would you say is the biggest capability gap possibly holding you back from embracing or fully adopting AI in your marketing efforts?

10

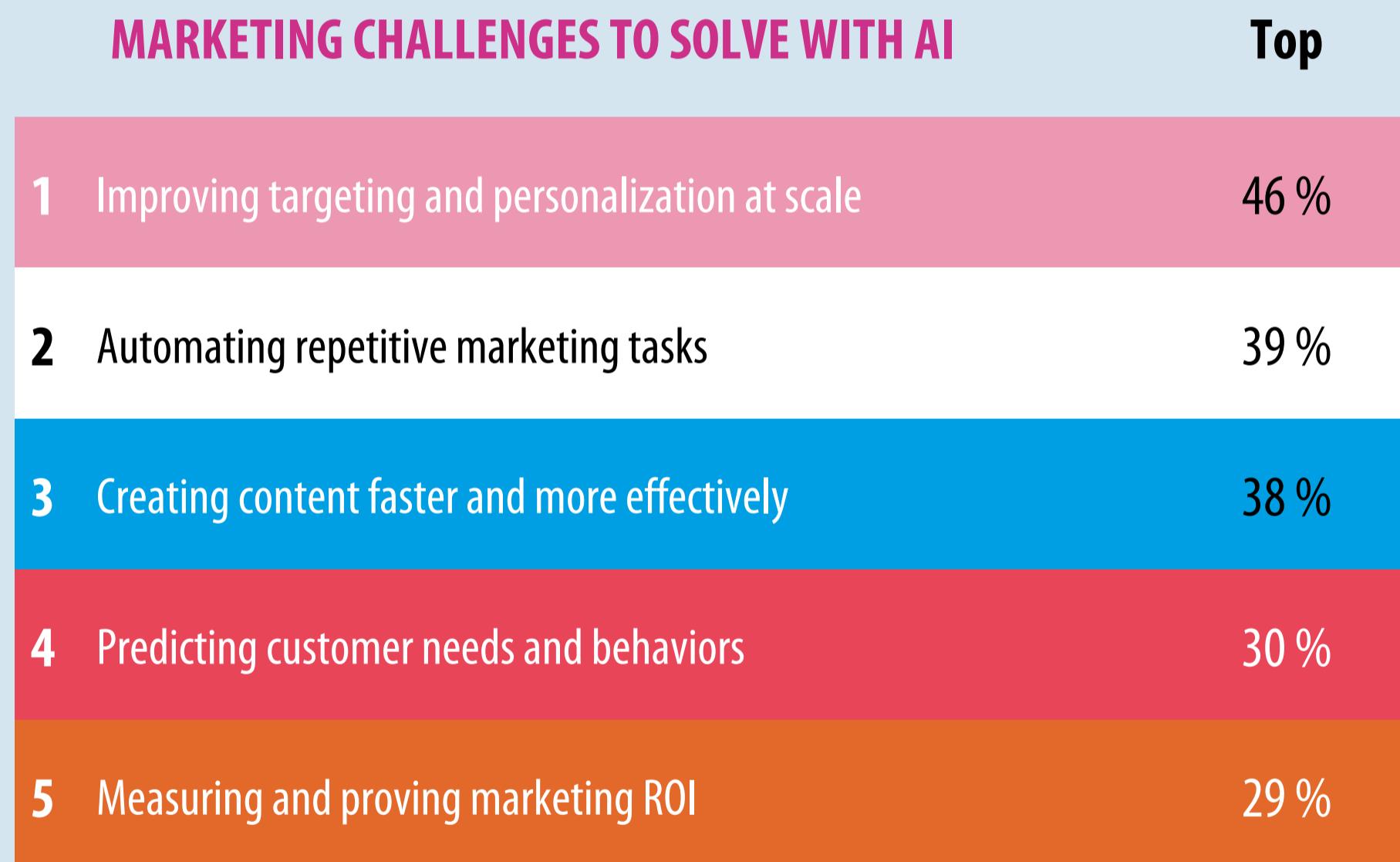
If AI could give you one marketing superpower tomorrow, what would it be, and why?

11

Which marketing challenge would you most want AI to help you solve as a marketer?

9

FOR REGIONAL CMOS, OVERCOMING AI CHALLENGES IS ULTIMATELY ABOUT ELEVATING CUSTOMER CENTRICITY

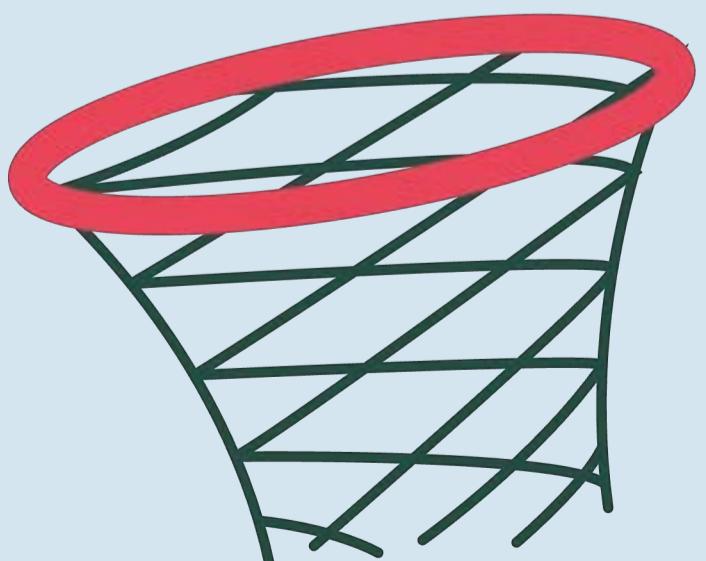


Customer Needs Central to Challenges

CMOs see AI as a pathway to anticipate and meet customer needs more precisely, prioritizing initiatives like personalization, content relevance, and predictive insights. Every challenge tackled is aligned with delivering greater value and engagement to the audience.

Efficiency Enables Customer Experience

CMOs view AI challenges as opportunities to better understand, anticipate, and serve customer needs. Their priorities, from personalization to predictive insights, are guided by a commitment to meaningful engagement, enabled by efficiency that can be achieved through automation.



Question: Which marketing challenge would you most want AI to help you solve as a marketer? (N=56)

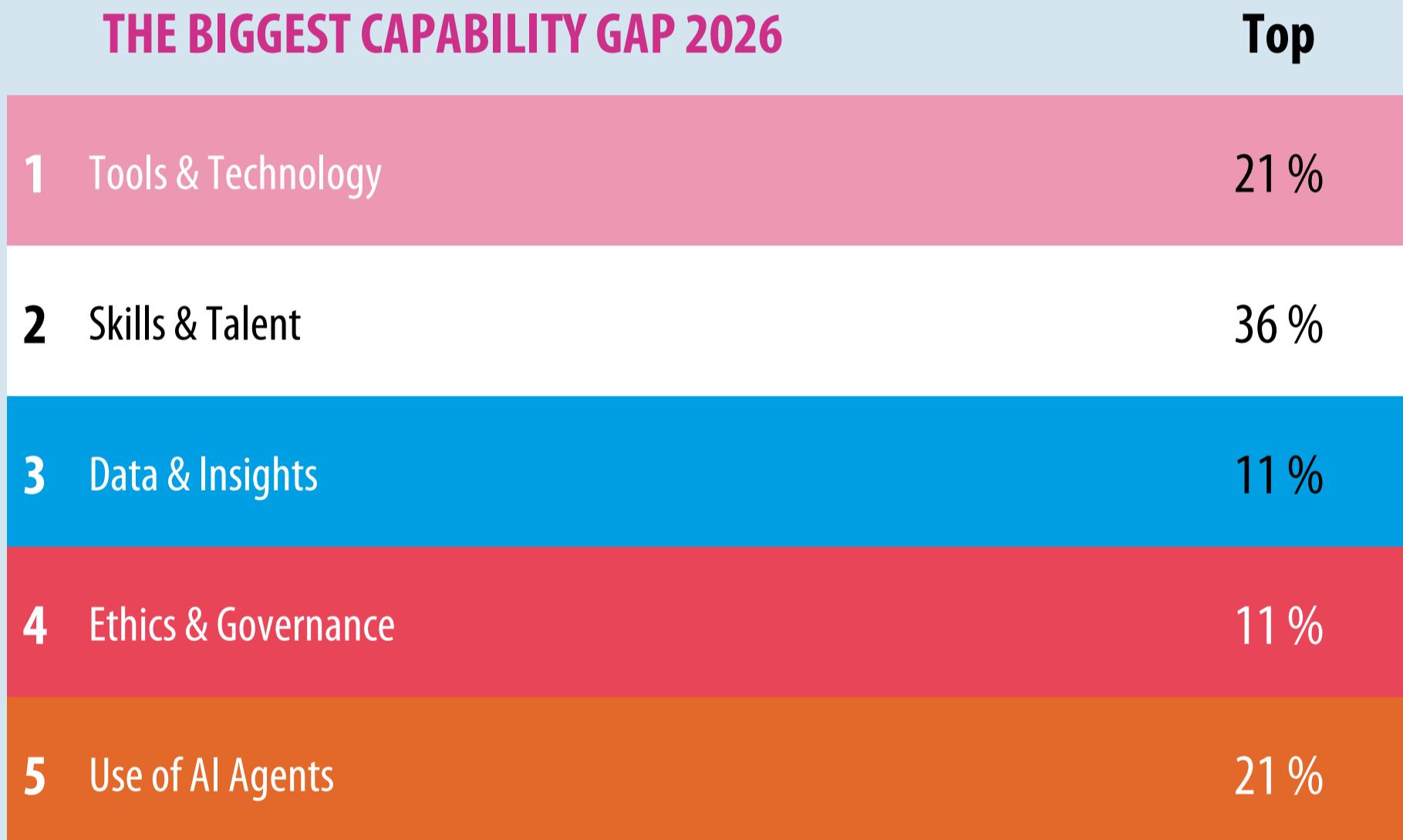
What would you say is the biggest capability gap possibly holding you back from embracing or fully adopting AI in your marketing efforts?

10

REGIONALLY, UPSKILLING PEOPLE EMERGES AS TOP PRIORITY FOR AI SUCCESS



THE BIGGEST CAPABILITY GAP 2026



Skills Gaps Eclipse Tech Gaps

A recent survey reveals that 36% of CMOs see skills and talent shortages as the biggest barrier to AI adoption—outpacing concerns about technology or data. This shows that empowering teams with the right skills is essential for harnessing AI's potential in marketing.

Implementation and Integration Still Challenging

Tools, technology, and the use of AI agents each concern about one in five CMOs. While infrastructure matters, successful AI adoption depends most on skilled teams ready to integrate new solutions seamlessly.

11

If AI could give you one marketing superpower tomorrow, what would it be, and why?



REGIONAL AI SUPERPOWER 2026: PREDICT, PERSONALIZE, AND SCALE CREATIVITY AT SPEED



SUPERPOWER WISHES 2026

Top



Top 1 | Predictive AI-Powered Hyper-personalization:

CMOs would like to leverage predictive AI to enable hyper-personalization, to allow them to anticipate customer needs and deliver perfectly tailored, real-time marketing experiences at scale.

Top 2 | AI That Turns Data into Action :

There is a strong demand for AI tools that can seamlessly mine, analyze, and activate data, transforming overwhelming information into simple, actionable insights that drive smarter decisions and measurable business outcomes.

BACKBONE

SERVICEPLAN GROUP

The Serviceplan Group is the largest independent, partner managed agency group in Europe. Established in 1970 as a classic advertising agency, Serviceplan soon developed its House of Communication concept to date, the only completely integrated agency model in Europe to unite all modern communication disciplines under one roof: Creative & Content, Media & Data and Experience & Commerce. With 33 of its own office locations and a number of other partnerships, the Serviceplan Group is represented in a total of 20 countries worldwide and all the important economic regions.

THE MARKETING SOCIETY

The Marketing Society was founded in 1959 as a not-for-profit membership organisation with the wish to connect the changemakers, those who want to make an impact and make a difference. Since then, the Marketing Society has grown to become a highly influential global community of marketing leaders with bases including England, Scotland, Hong Kong, Singapore, United Arab Emirates and New York.

UNIVERSITY OF ST. GALLEN (HSG)

The Institute of Marketing & Customer Insight at the University of St.Gallen (HSG) is a world-leading academic institution that enjoys the highest recognition of their contributions to academia, practice, politics, and society in the field of marketing and customer insight.

Heidrick & Struggles

Heidrick & Struggles is the world's foremost advisor on executive leadership, driving superior client performance through premier human capital leadership advisory services. For more than 70 years, we've delivered value for our clients by leveraging unrivaled expertise to help organizations discover and enable outstanding leaders and teams.

Learn more
at www.heidrick.com.



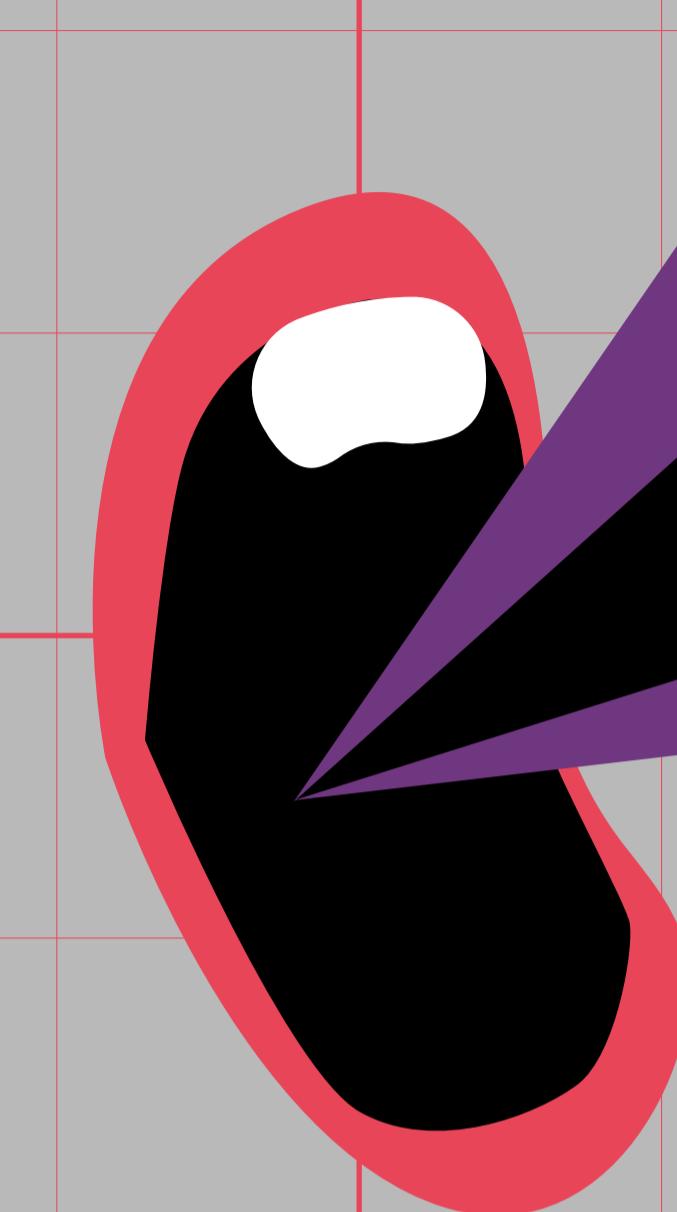
CMOs

805





THANK YOU!



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