

CMO FORUM MIDDLE EAST

Marketing Leadership Under Pressure

Closed-door. Peer-level. Off the record
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KEYNOTE

CEO - CMO Alignment

Driving Growth, Accountability & Long-Term Value

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LEADERSHIP IS ALREADY ADJUSTING

The shift is already happening, the question is how effectively it is being managed

66%

are actively adjusting
plans and investments

78%

biggest challenge delivering
growth under pressure

Source: abg April 2026

MARKET CONDITIONS IN THE REGION

- Demand is less predictable across segments and periods
- Customer mix is shifting (tourism vs resident demand)
- Spend is becoming more value led and promotion sensitive
- Reduced visibility on performance drivers

The impact is lower quality, less predictable demand

THE OPERATING MODEL HAS CHANGED

Harder to Grow

Higher cost of customer acquisition

Lower return on incremental growth

Greater variability in performance

Harder to Defend Margin

- Rising input and operating costs
- Increased reliance on promotions
- Extended payback periods

**The same level of growth now requires
more investment for lower returns**

CEO EXPECTATIONS

CEO expectations have shifted towards growth quality and capital efficiency

- Defend revenue quality
- Improve efficiency of growth
- Make trade-offs explicit
- Reallocate investment quickly
- Strengthen post-cycle position

**Alignment across leadership is
reflected in performance**

WHERE VALUE IS LOST

How organisations respond:

- Increased activity to sustain volume
- Channel expansion without clear economics
- Short term adjustments to brand investment

Observed outcomes:

- Higher cost of demand
- Reduced demand quality
- Fragmentation across channels and execution
- Pressure on pricing and margin

These responses are rational individually, but collectively reduce value

STRONGER ORGANISATION FOCUS INVESTMENT

PROTECT

Retention
High-margin segments
Proven channels

REDUCE

Low-quality paid acquisition
Blanket discounts
Low-contribution channels

BUILD

Quality first-party data
Stronger CRM capability
Pricing power

**Direct link between marketing activity
and commercial outcomes**

POSITIONING PROTECTS MARGIN

- Positioning is not a brand exercise, it is a commercial lever
- Reduced clarity increases reliance on incentives and paid demand
 - Retail: promotion cycles replacing brand-led demand
 - Hospitality: pricing sensitivity linked to positioning clarity
 - Platforms: paid acquisition substituting organic demand

MARKETING INVESTMENT UNDER PRESSURE

- Marketing is one of the most flexible areas of spend
- Visibility on return is required

Focus areas

- What is delivering profitable, repeat demand?
- What is declining in efficiency?
- What continues without clear returns?

Investment discipline drives performance

TWO QUESTIONS FOR LEADERSHIP TEAMS

Where is profitable growth being generated today?

If budget reduced by 30%, what would still perform?

OPERATOR EXAMPLE



Deliveroo UAE (Covid/IPO phase)

- Growth targets maintained
- Increased focus on profitability

Shift in approach:

- From volume to order economics
- Channel investment linked to customer profitability
- Focus on frequency and retention



Outcome:

- More controlled, profitable growth
- Increased predictability and payback visibility

WHERE ALIGNMENT HAPPENS

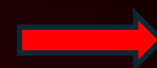
WITH WHOM

CFO



ON WHAT

Budget, Payback



WHY

Protect profit

COO



Capacity, Service



Deliver consistently

Product Team

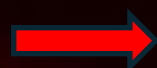


Roadmap, UX



Improve retention

Commercial /
Supply Chain



Stock, Pricing



Improve conversion
efficiency

Alignment compounds performance

ALIGNMENT DRIVES GROWTH QUALITY

- Clear view of where growth is generated
- Shared understanding of investment priorities
- Consistent decision-making
- Growth is measured and sustained

Where is alignment strongest today and where is it limiting growth?

Alignment is one of the few levers that improves growth, margin and predictability at the same time.



MARKETER OF THE
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