RESEARCH REPORT · 2026 EDITION

A department, or a headcount?

What a working marketing department is actually made of.
For Saudi companies between 50 and 250 employees.

> When profits fall short, marketing is cut first **44.6%** of the time. It gets cut because it can't answer. This report exists so yours can.

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Contents

Cross-references throughout the report use these section numbers.

What this report is, and what it isn't

This report is written for the people who sign the budget: founders, CEOs, and executives of Saudi companies with 50 to 250 employees, where sales already works and marketing is the line item nobody can explain. If that's you, read it in order. If your company is smaller or larger, section 25 was written for you.

The argument runs on three rings of evidence. First, international studies: Gartner, McKinsey and the ANA, Spencer Stuart, Duke's CMO Survey, and the documented record of named companies. Second, GCC data: regional CMO surveys, named Gulf cases, and the honest admission of what nobody measures here. Third, Saudi numbers: salaries in riyals, subsidies in riyals, and the 2026 regulations that changed the hiring math.

Two things this report is not. It is not a hiring manual; it argues that hiring is the third step, not the first, and section 13 shows what happens when it comes first. And it is not a plea for a bigger budget; most of the failures documented here happened inside funded teams.

It is also not standalone dogma. Its companion report, "Agency or in-house?", answered where the work should sit. This one answers the question underneath it: what has to exist inside your walls regardless.

One disclosure, so you can weigh the bias yourself: BMD builds marketing departments for a living. We benefit when companies build. Every number here carries its source in section 27, so judge the argument by its receipts.

> *Three rings of evidence. International. Gulf. Saudi.*

The verdict, up front

How many marketers do you employ? You answered fast. Now: what did marketing bring in last quarter? If the first answer came faster than the second, this report was written about your company.

That gap, between counting people and counting results, is the finding of the entire report. Four findings, in brief:

01 **Most companies don't lack marketers. They lack a system.** Only 52% of senior marketing leaders can prove marketing's value and get credit for it, per Gartner's 2024 survey. The other 48% employ marketers too.

02 **Four properties decide the outcome, not headcount.** A clear structure. A named owner. A measurement system. A direct line to revenue. Two employees with all four beat six without them.

03 **Ownership is the strongest lever the evidence knows.** Companies where the CEO puts marketing at the core of growth strategy are twice as likely to grow above 5% a year, and a single accountable growth owner correlates with up to 2.3 times the growth of companies that split the job. McKinsey and the ANA, 2023, reconfirmed 2025.

04 **Saudi changed the build math in 2026.** Marketing and sales roles now carry a 60% Saudization quota with a SAR 5,500 floor, while HRDF and Tamheer quietly pay you to hire properly. Building got more regulated and more subsidized at once.

THE VERDICT

A department is a system, not a headcount.

→ Before you decide anything, measure where you stand. Section 26 shows you how, in 5 minutes.

Sources — Gartner 2024 · McKinsey/ANA 2023, 2025 · The CMO Survey Fall 2024 · HRSD 2026

Define it before you fund it

Companies fund "marketing departments" every year without agreeing on what one is. So, definitions first.

A marketing department, for a non-marketer: the system that brings you new customers and makes existing ones pay more, in ways you can count. For a practitioner: a function with four properties. A clear structure. Named ownership of outcomes. A measurement system. A direct line to revenue.

Notice what the definition does not mention: headcount. A department is not people sitting in your office. Two employees plus two agencies can be a real department. Six marketers without measurement and ownership are not a department; they are, as we put it at BMD, a cost center wearing the name.

Each property has a test you can run today. Structure: can everyone name who decides what, in one sentence each? Ownership: does one person's name sit next to marketing's number? Measurement: can you trace your last 10 customers to their sources? Revenue: does marketing report money, or activity?

Hold those four. The next 20 pages are evidence for one claim: companies that pass those tests grow, and companies that fail them recycle marketers, agencies, and budgets on an 18-month loop, then conclude marketing doesn't work in their sector.

THE VERDICT

Six marketers can be less than two.

The market got serious. The bar moved with it.

Five numbers explain why "do we have a real department?" reached your desk this year and not five years ago.

18,723	Medium enterprises in Saudi Arabia (50 to 249 employees), per the latest published Monsha'at size breakdown. Every one of them runs marketing somehow; almost none of them designed how.
$4.68 bn	Saudi digital ad spend forecast for 2026, up 16.8% in one year, heading toward $8 billion by 2029. The cost of unmeasured spending scales with the spending.
60%	The Saudization quota for marketing and sales professions from April 19, 2026, for establishments with 3 or more workers in those roles, counting only Saudis paid SAR 5,500 or more. The state now regulates who staffs your department.
9.4–11.2%	What US firms your size report spending on marketing as a share of revenue (50–99 and 100–499 employees; The CMO Survey, small samples per band, read as direction). At SAR 100 million of revenue, that is a department-sized budget whether or not a department exists.
#2	Media buyer's rank among the fastest-growing jobs in Saudi Arabia (LinkedIn, 2025). Your competitors are not debating whether to staff marketing. They are hiring while you read.

Add the labor-market signal that colors all five: 75% of professionals in Saudi Arabia and the UAE told LinkedIn they planned to look for a new job in 2025. Whatever you build must be worth staying inside.

Sources — Monsha'at SME Monitor · ResearchAndMarkets 2026 · HRSD 2026 · The CMO Survey Fall 2024 · LinkedIn Jobs on the Rise 2025

Nobody builds the default. That's the problem.

Here is how a "marketing department" actually comes to exist, compressed. The company reaches 60 employees on the back of a sales team that was built deliberately: pipeline, targets, CRM, commissions. Then marketing accretes. A graduate is hired to "do our social media." An agency is added because a competitor's posts looked sharp. A part-time designer joins. Someone's cousin builds a website. Three years later the org chart says "Marketing Department," and not one decision in its history was a decision.

Then the quarterly meeting asks the only question that matters: what did all of this bring in?

Silence. The graduate shows follower counts. The agency sends impressions. The CFO files marketing under expenses we tolerate, and the room moves to the next item. The bar for keeping a sales job is a number. The bar for keeping the marketing function, apparently, is attendance.

This is not a new tension, and it is not a Saudi one. In 2012, the Fournaise Group interviewed more than 1,200 CEOs and reported that 80% were unimpressed by the work of their marketers. The study is 14 years old and was run by a vendor selling ROI tracking, so hold it loosely. Then hold the current numbers tightly: in Gartner's 2024 survey, CMOs themselves report that 40% of CFOs and 39% of CEOs are skeptical of marketing's value, and 47% say their C-suite treats marketing as an expense, not an investment.

The distrust is not a mood. It is the rational response to a function that was assembled by default and never given a way to answer.

THE VERDICT

Marketing didn't fail. It was never built.

Sources — Fournaise 2012 (vendor, dated) · Gartner 2024

Ten signs you have marketers, not a department

Score your company honestly. One point per sign that describes you.

01 Nobody can state last year's all-in marketing spend within 10%.

02 The "strategy" lives in someone's head, or in a deck nobody has opened since it was presented.

03 Reports show reach, impressions, and followers. Nobody shows revenue.

04 Sales and marketing define a qualified lead differently, or have never defined one at all.

05 Ad accounts, analytics, or the CRM sit in an agency's name, not yours.

06 The plan is a calendar of occasions: National Day, Founding Day, Ramadan, repeat.

07 Marketing reports to whoever had capacity this year: sales, HR, the CEO between meetings.

08 Budget is approved expense by expense, each one a fresh negotiation.

09 No marketing activity has been killed in the last 12 months.

10 The team's proudest metric is that everything was posted on time.

Zero to two points: you have a department; this report will sharpen it. **Three to five:** you have marketers and fragments of a system; the BUILD sequence in sections 16 to 21 is your repair plan. **Six or more:** stop hiring, stop signing, and start at section 17, because every riyal you add to this structure buys more motion and no more distance.

THE VERDICT

A cost center wearing the department's name.

Structure is decision rights, not a seating chart

Structure sounds like boxes and lines. In working departments it is three questions with fixed answers: who decides what, who reports to whom, and where marketing sits relative to power.

Size the function honestly first. Across 2,914 companies in one 2025 compensation dataset, marketing runs about 4.2% of headcount at 51–100 employee firms, 3.8% at 101–200, and 3.4% at 201–500. The sample skews tech, so treat those as a ceiling; a Saudi trading or industrial firm sits lower. Derived plainly: a 60-person company supports roughly 2 marketers. A 250-person company supports 6 to 9. Whoever promised you a "full team" below that math was selling org charts.

Then place it near power, because distance from the CEO predicts what marketing becomes. Only 63% of Fortune 500 companies have a marketing leader who sits on the leadership team and reports directly to the CEO, per McKinsey's 2025 survey, and the ones that don't are the ones where marketing drifts into a service desk for sales. The pattern has a local echo: Saudi Arabia's new flag carrier, Riyadh Air, runs marketing at SVP level beside a Chief Commercial Officer rather than behind one.

The rule for your size: marketing's owner reports to the CEO or the general manager, holds a written scope, and shares exactly one revenue number with sales. Anything else is a queue, not a structure. Section 19 gives the shapes by company size.

THE VERDICT

Structure is who decides, not who sits where.

Sources — Pave 2025 (n=2,914, tech-skewed) · McKinsey/ANA 2025 · Riyadh Air leadership page 2026

One name next to one number

Ask who owns sales and a name comes back in a second. Ask who owns marketing and you get a committee, a vendor, or a pause. That pause is the single most expensive silence in your company, and the evidence on it is unusually loud.

McKinsey and the ANA studied the question twice, in 2023 and again in 2025. Companies where the CEO places marketing at the core of growth strategy are twice as likely to grow above 5% a year. Companies with a single customer or growth owner on the executive committee grow up to 2.3 times more than companies that split the job across several roles. Keep the "up to"; it is a correlation from C-suite surveys, not a law of physics. Direction, however, is not in doubt.

Now the gap between that evidence and practice. Only 50% of CEO-CMO pairs agree on what marketing's primary role even is. Only half of CMOs say they are involved in strategic planning. Between 2023 and 2025, measured CEO-CMO misalignment rose 20%. And when Russell Reynolds analyzed CMO job specs in 2025, 100% demanded revenue growth while only 33% of sitting CMOs prioritized profitability as a KPI. Companies are writing revenue into the job and then structuring the job so nobody can deliver it.

The fix costs nothing and offends someone: one person's name goes next to marketing's number. Senior enough to grade the work, close enough to the CEO to be heard, and accountable the way your head of sales is accountable. Rename nothing. Own something.

THE VERDICT

One name, one number, or nothing compounds.

Sources — McKinsey/ANA 2023, 2025 · Russell Reynolds 2025

Confidence is not measurement

Here is the most useful pair of numbers in this report. In Nielsen's 2024 global survey, 84% of marketers said they were confident in their ROI measurement. In the same survey, 38% actually measured holistically across channels. A year later that second number fell to 32%. Half of your industry is confident about something it does not do.

The cost of that gap lands at budget time. Only 52% of senior marketing leaders can prove marketing's value and get credit for it (Gartner, 2024). In Duke's CMO Survey, 54.6% of US marketing leaders can demonstrate marketing's short-term impact quantitatively, and only 41.8% can demonstrate its long-term impact. The rest negotiate their budgets on charm.

A measurement system is smaller and more boring than the word "analytics" suggests. It is: the ad accounts, analytics, and CRM in your name, not an agency's. One dashboard that leadership actually opens. A distinction we insist on at BMD between vanity metrics, the numbers that measure applause, and clarity metrics, the numbers that measure money: cost per qualified lead, pipeline created, revenue attributed, payback. And a habit, because the same Gartner study found that leaders who meet regularly with their analytics people prove marketing's value 62% of the time versus 30% for those who don't. The system is partly a meeting.

Build it before you build the team. Measurement retrofitted after two years of activity is archaeology; wired in from day one, it is navigation.

THE VERDICT

Confidence is not measurement.

Sources — Nielsen 2024, 2025 (measurement vendor) · Gartner 2024 · The CMO Survey Fall 2024

Marketing that can't show revenue pleads annually

When profits fall short, marketing is cut first 44.6% of the time, per Duke's CMO Survey. Not because CFOs hate marketing; because in most companies it is the largest line item that cannot defend itself in the CFO's language. The pressure is not imaginary: marketing leaders report value-proof pressure from CFOs at 63%, CEOs at 61%, and boards at 50%, all sharply up year over year.

The defense is a line to revenue, and it has three strands. First, targets that are written down. In one vendor survey of 515 marketers, those with a documented strategy were 414% more likely to report success, yet only 17% had documented theirs fully; self-reported and vendor-run, so read it as direction, but the direction embarrasses most org charts. Second, a shared definition of a qualified lead with sales, in writing, because a lead marketing celebrates and sales deletes is not a lead; it is friction wearing a KPI's name. Third, reporting in money: pipeline created, revenue attributed, cost per acquisition, payback period.

One more strand, because your CFO will ask. The evidence says the revenue line must include brand, not replace it. WARC's 2025 analysis with Analytic Partners (measurement vendors, noted) found that moving from performance-only spending to a blended brand-plus-performance strategy improved total revenue ROI by 25% to 100%, with the midpoint near 90%, while 60% of marketers admit the C-suite doesn't fully understand advertising's role in growth. The department that reports revenue earns the right to invest in brand. The one that reports impressions earns a smaller budget.

THE VERDICT

Revenue is the only language budgets speak.

Sources — The CMO Survey 2024, 2025 · CoSchedule 2022 (vendor) · WARC/Analytic Partners 2025 (vendor) · WARC/ANA 2026

What the anatomy costs, in riyals

The four properties are not free, and pretending otherwise produces the one-person departments of section 13. Here is honest 2026 math for the core, salaries loaded at 1.3 times base per the standard finance rule, using open Saudi salary data.

THE OWNED CORE, THREE COMPANY SIZES — SAR / MONTH, LOADED

COMPANY SIZE	CORE TEAM	LOADED COST
50–100	One senior generalist owner + one specialist + rented edges	~28k–38k
100–200	Owner + 2 to 3 specialists + freelance production	~48k–70k
200–250	Marketing manager or director + 4 to 6 team + agency surge	~85k–130k

Add the system around the people: a tool stack runs SAR 50,000 to 70,000 a year for a serious mid-size setup, and the measurement wiring of section 10 is mostly configuration time, not license fees.

Is that a lot? Benchmark it. US firms of 50–99 employees report marketing spend around 9.4% of revenue, and 100–499 employee firms around 11.2% (The CMO Survey; small samples, direction not decimals). Gartner's large-enterprise number sits at 7.7% to 7.8% of revenue, on billion-dollar samples. Even at a conservative Saudi 3% to 5% of revenue, a SAR 100 million company is spending SAR 3 to 5 million a year on marketing somehow. The core team above is a fraction of that number, and it is the fraction that decides whether the rest compounds or evaporates.

The comparison that matters is not this cost against zero. It is this cost against the 18-month loop of hired-and-departed marketers, swapped agencies, and relaunched brands that unmeasured marketing produces on schedule.

THE VERDICT

The system costs less than the churn it replaces.

Sources — GulfTalent Jul 2026 · Recfront 2025 · ERI 2026 · MIT (Hadzima) · The CMO Survey Fall 2024 · Gartner 2024–2026

Four ways it fails before it exists

01 **The junior-alone start.** The most common first move in the region: hire a graduate to "figure out marketing." Jason Lemkin of SaaStr wrote the autopsy back in 2015 and has restated it since: hire too junior in marketing and you get "a squish soft mess," blog posts and social activity with no accountable pipeline. Every credible framework since prescribes the opposite: a senior, hands-on generalist first.

02 **The one-person department.** Strategist, designer, media buyer, analyst, photographer: one salary. In a 2025 survey of 1,070 marketers, the most common self-descriptions of the job were "uncertain," "stressful," and "overwhelming," with solo marketers reporting the lowest satisfaction of all. The single point of failure eventually resigns, and takes the entire function's memory along.

03 **The premature scale-up.** Startup Genome's 2011 analysis of 3,200+ startups found about 70% scaled something before nailing it, and the premature scalers carried teams roughly 3 times too large for their stage. The data is fifteen years old; the pattern outlived it. Five hires before one working channel is still five salaries auditioning for one job.

04 **The ownerless launch.** The company hires marketers but keeps strategy "with leadership," which means with nobody. Deadlines exist, direction doesn't. This is the birth defect the other three grow from, and its treatment is section 9, not another hire.

ILLUSTRATIVE COMPOSITE · PATTERNS FROM REAL GCC COMPANIES, DETAILS CHANGED

A Riyadh software distributor, 90 employees, hires a fresh graduate to "own marketing." Ten months later: 400 posts, two exhibition booths, a refreshed slide template, and a resignation letter. The CEO concludes marketing doesn't work in B2B distribution. The graduate concludes nobody ever defined the job. The graduate is right.

THE VERDICT

They hired marketers. They never built the department.

Sources — SaaStr 2015, 2025 · The Marketing Meetup 2025 · Startup Genome 2011–12 (dated)

Four ways it fails after it exists

01 **The unmeasured team.** In January 2025, Emaar's founder told a Dubai stage why he let his marketing team go: they could not show how spending affected sales, while a $70,000 video, by his own unaudited attribution, produced billions in demand. Read the story precisely: Emaar had appointed a head of centralised group marketing in 2021; this is not a company without marketing. It is a founder with zero patience for marketing that cannot answer. Expect that patience level to spread.

02 **The sales appendix.** Marketers filed under a sales director who grades them by gut feel. Sales optimizes for this quarter; marketing that only serves this quarter never builds the asset that makes next year cheaper. Nine in ten sales and marketing professionals say the two functions are misaligned (LinkedIn research, vendor); inside one reporting line, misalignment just gets quieter.

03 **The skills fade.** Marketing skills decay fast outside a community of practice. In the CIM benchmark that tested 7,000+ marketers in 2021, analytics proficiency fell to 29%, and in-house teams' known weak spots have not moved since: 63% of companies with in-house agencies struggle to keep the talent energized (ANA, 2019), and 65% of in-house teams were reorganized within two years (IHAF/Forrester, 2020).

04 **The theater trap.** The team is busy, the calendar is full, the reports are colorful, and none of it is denominated in money. Theater departments survive until the first serious cost review, which is the 44.6% statistic of section 11 arriving in person.

ILLUSTRATIVE COMPOSITE · PATTERNS FROM REAL GCC COMPANIES, DETAILS CHANGED

A Dammam industrial supplier, 140 employees, four marketers under the sales director. Sales grades them by feel: "the market knows us now." Finance grades them by cost: SAR 1.1 million a year, loaded. Nobody grades them by revenue. At the next cost review, feel loses to cost. Two are cut, and the two who remain inherit the same undefined job at half capacity.

THE VERDICT

Activity is what theater looks like from inside.

Sources — Entrepreneur ME / Zawya 2025 · Campaign ME 2021 · LinkedIn (vendor) · CIM/Target Internet 2021 · ANA 2019 · IHAF/Forrester 2020

System versus theater

Look back at the eight failures. Four happen before the department exists, four after, and all eight share one anatomy: activity was present, and the four properties were absent. Nobody owned it. Nothing was measured. Structure was an accident. Revenue was somebody else's slide.

Our companion report named the ownership version of this disease orphan marketing, and gave it a test: it was never agency versus in-house; it's owned versus orphaned. This report generalizes the diagnosis. A marketing function is either a system, where structure, ownership, measurement, and a revenue line make every riyal inspectable, or it is theater, where motion substitutes for evidence and the annual budget meeting is opening night.

The distinction is not about talent, and this point matters in a market where 75% of professionals are open to leaving. The marketers inside theater departments are usually capable. They are also unmeasurable, unpromotable on merit, and the first line item cut when profits dip, which the data says happens 44.6% of the time. Theater is not neutral. It burns the very people it employs, then tells the CEO that marketing doesn't work here.

The evidence for the system side is the whole first half of this report: twice the odds of high growth with marketing at the core, up to 2.3 times with one owner, budgets that survive scrutiny because they can answer it. The question is not whether to have marketers. You already do.

THE RELABEL

The question was never how many. It's system or theater.

Sources — McKinsey/ANA 2023, 2025 · The CMO Survey 2024 · LinkedIn 2025

Don't start with hires. Start with the truth.

Companies that fail at building almost always fail the same way: they hire first and define later. The working sequence is the reverse, and it has five stages. At BMD we call it the BUILD framework; use it with us or without us.

B	**Baseline.** Establish the truth about where marketing stands: what you spend all-in, what you can attribute, what's tracked and what's theater.
U	**Unify.** Tie marketing to revenue targets leadership agrees on, in writing, with sales and marketing sharing one definition of a qualified lead.
I	**Implement.** Now, and only now, the structure and the first hire: a senior generalist owner, never a junior alone.
L	**Leverage.** Choose the 2 or 3 channels your customers actually come from, staff those, rent the rest, and wire measurement in from day one.
D	**Drive.** A monthly rhythm where numbers are reviewed and something gets killed when it underperforms.

We did not invent the order; we operationalized it. Every credible framework for building a marketing function, from SaaStr's 2015 doctrine to First Round's hiring gates, MKT1's first-marketer profile, and CXL's 2025 growth-team guide, converges on the same three rules: strategy and measurement before headcount, a senior hands-on generalist as the first hire, and specialists later, hired by that person. Not one credible source prescribes the junior-first, define-later pattern that dominates this market. The consensus is unanimous, which in this industry is rare enough to be a finding.

The next five pages give each stage in working detail, with its artifacts, so you can run the sequence yourself.

THE VERDICT

The order is the method.

Sources — SaaStr 2015, 2025 · First Round Review 2019, 2021 · MKT1 2021 · CXL 2025

B is for Baseline: you can't improve what you won't admit

Baseline answers one question: where does marketing actually stand today, in numbers nobody can argue with? It is the stage the Emaar story skipped straight to the ending of, and it takes two to four weeks, not a quarter.

Four artifacts come out of it:

01 **The all-in spend number.** Salaries loaded at 1.3x, agencies, freelancers, tools, ad spend, events, sponsorships, the website rebuild everyone forgot. One number, last 12 months. In most companies this number has never been assembled, which is why the budget conversation never ends.

02 **The attribution audit.** Take your last 20 customers and trace each to a source: referral, walk-in, exhibition, ads, search, sales outbound. "Unknown" is an acceptable answer and a finding. The percentage you can trace is your measurement baseline.

03 **The asset inventory.** Every account, access, and dataset, with its legal owner: ad accounts, analytics, CRM, domain, social handles. Anything in an agency's or ex-employee's name goes on the risk list.

04 **The activity ledger.** Every recurring marketing activity with its monthly cost and its claimed purpose, one line each. No judgment yet; judgment is stage five's job.

Run the truth test in your next leadership meeting, five questions, thirty seconds each: Can anyone name last year's all-in spend? Where did our last 10 customers come from? Who legally owns our ad accounts? What marketing number do we look at weekly? What would we kill tomorrow if we had to kill something? Count the silences. Each one is a line of this report you'll want to reread.

THE VERDICT

You can't improve what you won't admit.

U is for Unify: agreement in writing beats alignment in spirit

Unify converts the baseline into a contract between leadership and marketing. Not a 40-page strategy deck; one page, three agreements, signed in a meeting that ends on time.

01 **The revenue link.** Marketing's contribution to this year's revenue target, stated as numbers: qualified leads per quarter, pipeline value, revenue from existing customers. If leadership won't commit to a number, it has committed to theater, just politely.

02 **The one-sentence answer.** Why do customers choose you over the two competitors they also called? One sentence, agreed by leadership, used by everyone. Companies that cannot write this sentence are about to pay an agency to guess it.

03 **The qualified-lead definition.** Sales and marketing agree, in writing, on what counts: industry, size, budget signal, behavior. Then both live with it. This single page ends the oldest war in the building.

The evidence for putting this stage before hiring is the misalignment record of companies that didn't. Only 50% of CEO-CMO pairs agree on marketing's primary role. Only half of CMOs are involved in strategic planning at all. Measured CEO-CMO misalignment rose 20% between 2023 and 2025, at companies with far more process than yours. Alignment does not survive as a feeling; it survives as a document that a new hire can read on day one and a CFO can audit on day 300.

Unify is also where the build-or-rent question from our companion report gets settled per function, because now there is something to brief an agency against. Rent execution wherever you like. The contract stays inside.

THE VERDICT

Agreement in writing beats alignment in spirit.

Sources — McKinsey/ANA 2023, 2025

I is for Implement: hire the owner before the hands

Only now, with the truth on paper and the targets in writing, does hiring start. The first hire is the highest-leverage personnel decision in this report: a senior generalist owner, 5 to 8 years in, hands-on enough to run campaigns personally and senior enough to own the number from stage two. Not a VP of slides. Not a junior alone, ever. This is also the unanimous prescription of every framework in section 16, so you do not have to take our word for it.

THE TEAM SHAPE BY COMPANY SIZE — DERIVED FROM SECTION 8 RATIOS AND BMD PRACTICE

SIZE	SHAPE	NOTES
50–100	Owner + 1 specialist + rented edges	The owner runs strategy and one channel personally
100–200	Owner + 2 to 3 specialists + freelance production	First specialists: performance, content
200–250	Manager or director + 4 to 6 team + agency surge	Specialisms still rented per the companion report

Write the role charters before the job ads: each role's outcomes, decision rights, and the number it reports weekly. Approve the year's budget in advance, as one envelope, not expense by expense; a department that renegotiates every invoice spends a third of its energy on internal sales.

And design for the 2026 rules instead of tripping on them: marketing and sales roles carry a 60% Saudization quota at establishments with 3 or more such workers, counting only Saudis paid SAR 5,500 or more. Structure the team so the quota holds at target salaries from day one; retrofitting compliance costs more than designing it in. Section 22 shows how the subsidies pay you back for doing this properly.

THE VERDICT

Hire the owner before the hands.

Sources — SaaStr · First Round · MKT1 · CXL · HRSD 2026 · GulfTalent 2026

L is for Leverage: channels are chosen, not collected

Leverage answers where the system spends its energy. The default company runs seven channels badly. The working department runs 2 or 3 deliberately, chosen by evidence, and the evidence is already in your baseline: where did the last 20 customers actually come from, and where does your audience actually live?

The Saudi channel math is unusual enough to reward the homework. Snapchat's advertising reaches 72.9% of the Saudi population, and roughly 90% of Saudis aged 13 to 34, at about 70 minutes a day. A channel mix copied from a US playbook misses the country's attention map entirely. So does a mix copied from your competitor, who copied it from theirs.

Rules for the stage:

01 Fund 2 or 3 channels to competence before touching a fourth. Half-funded channels produce whole invoices and half results.

02 Staff the owned core, rent the edges. Always-on content and community stay inside near the product; deep specialisms and surge production stay rented. The full own-versus-rent split is the companion report's section 19; it plugs in here unchanged.

03 Wire measurement into the channel on day one, not day 300: tracking parameters on every link, CRM stages agreed with sales, one dashboard that updates without anyone compiling it. Retrofit is archaeology; day-one wiring is navigation.

04 Budget the stack honestly: SAR 50,000 to 70,000 a year covers a serious mid-size toolset. Below that, expect spreadsheets; above it, expect shelfware.

THE VERDICT

Channels are chosen, not collected.

Sources — Snap Inc. at Saudi Media Forum 2025 · BMD practice

D is for Drive: review monthly, kill quarterly, compound yearly

Drive is the stage that separates departments from projects. Everything before it can be built in a quarter; this one is a rhythm, and rhythms are what companies actually fail at.

The monthly meeting: one hour, the dashboard from stage four, and a rule that the meeting produces at least one decision: scale something, fix something, or kill something. The numbers reviewed are clarity metrics, the ones denominated in money: cost per qualified lead, pipeline created, revenue attributed, payback. Vanity metrics, the applause numbers, may attend; they may not vote.

The kill criteria: written when an activity starts, not negotiated when it struggles. "This channel gets two quarters and SAR 60,000 to produce qualified pipeline at target cost, or it stops." If you have not killed a single marketing activity in 12 months, you are not evaluating; you are funding habits.

The quarterly review: marketing presents to leadership in revenue language, 30 minutes, the same four numbers every time. This habit alone moves you across the most decisive line in the measurement data: leaders who meet regularly with their analytics function prove marketing's value 62% of the time; those who don't, 30%. The difference between the two is not talent or tooling. It is a recurring calendar invite that nobody is allowed to decline.

The annual re-baseline: rerun stage one every year, because scope creeps back and dead activities regrow. A department that re-audits itself annually never needs to be rescued.

THE VERDICT

Review monthly. Kill quarterly. Compound yearly.

Sources — Gartner 2024

Six to twelve months, and the state pays part

Set the schedule honestly. Baseline and Unify: the first two months. Implement: months 2 to 4, because a serious Saudi hire takes 4 to 8 weeks to find before notice periods, and a wrong hire costs 50% to 200% of the annual salary to replace. Leverage: months 4 to 9, channels live and measurement wired. Drive: the rhythm holds from month 6 and starts compounding by month 12. A functioning department takes 6 to 12 months. Anyone promising one in 60 days is selling you a slide.

Now the part of the math almost nobody prices in: the Saudi state subsidizes exactly the sequence this report prescribes.

30–50%	Share of a Saudi hire's wage HRDF pays for up to 24 months, capped at SAR 3,000 a month. On a SAR 10,000 specialist, that is up to SAR 72,000 back for hiring properly.
0	Salary cost of a Tamheer trainee for 3 to 6 months: graduate capacity for the content and coordination work every young department drowns in.
60%	The Saudization quota that makes ad-hoc marketing hiring legally risky from April 2026. Designed into the structure from day one, it is not a constraint; it is a discount, because the subsidized hires are the quota.

Run the two offsets against the section 12 cost table and the conclusion is uncomfortable for procrastinators: for a 100-person company, the state can cover a meaningful slice of the owned core's first two years. The subsidy expires the day you decide to keep improvising instead.

THE VERDICT

Slow is the honest speed. Subsidized is the smart one.

Sources — HRDF · Tamheer program terms · HRSD 2026 · TASC 2025 · Michael Page 2026

Find yourself in these two pages

Six situations cover most of the 18,723. Each gets a verdict and a first 90 days. Adjust for your sector; don't adjust the four properties.

SCENARIO 01

CONSUMER RETAIL · 150 EMPLOYEES

Five marketers, daily content, two years of flat growth, no attribution anywhere.

Don't hire. Install.

FIRST 90 DAYS

Run Baseline on the existing function; the all-in number will surprise everyone. Name one owner from the five, or hire above them. One dashboard, one qualified-lead definition with sales. Kill the two activities that can't explain themselves. Re-judge everyone, kindly, in two quarters, with numbers instead of impressions.

SCENARIO 02

FUNDED TECH · 80 EMPLOYEES

Marketing is the founder's instinct plus improvised launches. It worked until this size.

Hand off the system. Keep the taste.

FIRST 90 DAYS

Hire the senior generalist owner, 5 to 8 years, hands-on. The founder keeps brand-voice veto for two quarters, then advisory. Numbers into one dashboard before any new channel. Write the one-sentence answer while the founder still remembers why customers came.

SCENARIO 03

B2B SERVICES · 120 EMPLOYEES

Three marketers report to the sales director. Weekly arguments about lead quality, in both directions.

Separate the function. Share the number.

FIRST 90 DAYS

Marketing's owner reports to the CEO or GM, not to sales. One joint revenue number for both functions, one written qualified-lead definition. The arguments don't end because someone wins; they end because the definition does.

SCENARIO 04

TRADING · 60 EMPLOYEES

One junior "does marketing" alone: posts, brochures, the exhibition booth, and quiet despair.

One junior is a task list, not a department.

FIRST 90 DAYS

Contract a fractional marketing lead above the junior, a few days a month, to own strategy and grade the work. Give the junior a written scope and a growth path; their retention risk is the highest in the building. Baseline, then two channels, then revisit a full hire when a number proves the case.

SCENARIO 05

CONSUMER BRAND · 200 EMPLOYEES

Everything lives at three agencies. The CEO coordinates them between meetings and calls it strategy.

Move the head in-house. The hands can stay.

FIRST 90 DAYS

Hire the owner, director level. Ad accounts, analytics, and CRM migrate into company names, non-negotiable. Re-brief every agency with revenue-tied goals and kill criteria. Keep the agencies that answer fast; the companion report's five rules apply verbatim.

SCENARIO 06

FAMILY F&B · 70 EMPLOYEES

"We tried marketing twice. It doesn't work in our sector." Both attempts: a junior, no numbers, no owner.

Two orphans aren't evidence. Run one measured quarter.

FIRST 90 DAYS

The truth test from stage one, in one sitting. One HRDF-supported Saudi hire with a written scope, a Tamheer trainee for the daily work, SAR 3,000 to 5,000 a month of ad budget, and one quarter of honest measurement. Fifty thousand riyals of evidence beats five more years of "it doesn't work here."

> *None of the six verdicts added headcount first. Every one installed ownership and measurement first.*

Under 50 or over 250? Your version of the answer

UNDER 50 EMPLOYEES

You don't need a department, and building one early is its own failure mode; Startup Genome's old but durable finding was that premature scalers carried teams 3 times too large for their stage. You need the four properties at their minimum viable size: one senior person, possibly you, owns two questions: who exactly is our customer, and what did each riyal bring back? Execution comes from freelancers and small specialist agencies, hired per outcome. The one refusal that protects you: never a junior alone "to figure out marketing." You would be buying section 13 at a discount.

OVER 250 EMPLOYEES

You already have the headcount; your risk is a department that stops being graded. The four properties become an annual audit rather than a construction project. Structure: does decision-making still match the org chart, or has a shadow hierarchy grown? Ownership: is there still one name, or did a matrix eat it? Measurement: are the dashboards still denominated in money, or did vanity creep back? Revenue: when did marketing last kill something significant? Large departments fail politely: empires form, vendor lists sprawl until they quietly rebuild an agency roster under new names, and reorganizations substitute for evaluation, which the in-house record says happens to 65% of teams within two years. Grade the department the way you grade a business unit, annually, in money.

THE VERDICT

The properties scale. The excuses don't.

Sources — Startup Genome 2011–12 (dated) · IHAF/Forrester 2020

You've read everyone else's numbers. One set is missing.

Twenty-six sections of other companies' data cannot answer the question your next budget meeting will actually ask: is your marketing a system or a theater, and where exactly does it break?

That is measurable, and it takes 5 minutes. The Scale Readiness Assessment scores your company across the five components of a working marketing department, which readers of this report will recognize as the anatomy with its work clothes on: baseline visibility, strategy alignment, structure and ownership, channel investment, and evaluation rhythm. You get a score out of 100, the band your company sits in, from Undefined, where marketing happens by accident, to Compounding, where it runs as a measured revenue system, and the one constraint to fix first.

Whatever this report made you want to do, the score is the starting point. If you're about to build, it tells you which stage of BUILD to start at. If you run agencies, it becomes the brief. If you plan to change nothing, it at least prices what "nothing" costs you per quarter.

TAKE THE ASSESSMENT

buildingyourmarketingdepartment.com

5 MINUTES · FREE · ONLINE · INSTANT SCORE OUT OF 100

Bring the score to your next budget meeting instead of opinions. The meeting gets shorter.

THE VERDICT

You can't manage what you can't answer.

Where every number came from

Three rings of evidence: international studies, GCC data, and Saudi market numbers, researched and verified in July 2026. Where a claim could not be verified at its primary source, it was dropped or labeled. Known limits, stated plainly: the big studies sample big companies (Gartner surveys mostly $1B+ firms; McKinsey/ANA samples Fortune 1000 C-suites; Nielsen samples $1M+ media budgets), so we quote their mechanisms, not their benchmarks, for 50–250 employee firms. Vendor-run research is labeled at point of use (Nielsen, CoSchedule, WARC's measurement coalition, LinkedIn, Fournaise). Dated classics are dated in the text (Fournaise 2012, Startup Genome 2011–12, CIM skills benchmark 2021, ANA in-house 2019). The two composite stories are illustrative patterns from real GCC companies with details changed, and are labeled as such. And one absence is itself a finding: no census measures how many GCC or Saudi companies have a working marketing department. Nobody in the region counts this. This report exists partly because of that gap.

INTERNATIONAL STUDIES

McKinsey/ANA, The Power of Partnership (2023) · McKinsey/ANA, The CMO's Comeback (2025) · Gartner CMO Spend Surveys (2024–2026) · Gartner Marketing Analytics Survey / CMO Value Playbook (2024) · The CMO Survey, Duke Fuqua/Deloitte/AMA (Fall 2024, Spring 2025, Spring 2026) · Spencer Stuart CMO Tenure Studies (2025, 2026) · Russell Reynolds (Dec 2025) · Nielsen Annual Marketing Reports (2024, 2025) · WARC, The Multiplier Effect with Analytic Partners et al. (2025) · WARC/ANA Multiplier Playbook (2026) · CoSchedule Trend Report (2022) · CIM/Target Internet Digital Skills Benchmark (2021, 2024) · ANA/BCG/Reed Smith in-house study (2019) · IHAF/Forrester (2020) · Startup Genome (2011–12) · Fournaise Group (2012) · Forrester (2024)

NAMED CASES, FRAMEWORKS & TRADE PRESS

Emaar/Alabbar, 1 Billion Followers Summit (Entrepreneur ME, Zawya, Jan 2025; Campaign ME 2021 for the group-marketing appointment) · Riyadh Air leadership structure (2026) · SaaStr/Jason Lemkin (2015, 2025) · First Round Review, Arielle Jackson (c.2019) and Maya Spivak (2021) · MKT1, Kramer & Estreich (2021) · CXL (2025) · Adweek (2025)

GCC AND MENA

ABG Pulse, Middle East Marketing Leadership (Campaign ME, Mar 2026) · JWI, Marketing Through Uncertainty (Communicate, May 2026; agency research) · Hays GCC Salary Guide 2026 · LinkedIn Jobs on the Rise 2025 · PwC/Strategy& GCC family business research (figures trace to 2016)

SAUDI MARKET

Monsha'at SME Monitor (size breakdown) · HRSD Saudization decisions (2022; Jan 2026, effective Apr 2026) · HRDF employment-support and Tamheer program terms · GulfTalent (Jul 2026) · Recfront KSA Salary Guide (2025) · ERI SalaryExpert (2026) · Michael Page Saudi Arabia (2026) · TASC KSA hiring benchmarks (2025–26) · ResearchAndMarkets Saudi Digital Ad Spend (2026) · Snap Inc. at Saudi Media Forum (2025) · Saudi agency price guides (2025–2026), as compiled in our companion report

BMD builds marketing departments.

Most companies don't have a marketing problem. They have a marketing department that was never built. They hired marketers, bought tools, ran campaigns, and called it a department. But a real department has structure, ownership, measurement, and a direct line to revenue. Without those, marketing isn't a department. It's a cost center wearing the name.

BMD is a boutique consultancy that installs structured, measurable marketing departments inside mid-market companies across the GCC. We don't run your campaigns, and we don't hand you a strategy deck and leave. We build the operating system: the structure, the measurement, and the ownership that turn marketing into a function leadership can rely on.

The method is the BUILD framework, five stages: Baseline Analysis, Unify Vision & Strategy, Implement Structure, Leverage Channels, Drive Evaluation. It's published and practiced: a book, an online program, a community of Gulf founders and marketers applying it, and proprietary diagnostics (the Marketing Truth Dashboard, the Scale Readiness Scorecard, and the GROWTH Code) that replace assumptions with measurement. Engagements run in two phases plus ongoing advisory, delivered in Arabic and English, founder-led.

> THE FOUNDER
>
> Redha Alayesh. A marketer with a software engineer's discipline and a scientist's mindset. Across 20+ organizations in the GCC, he built the BUILD framework to solve the problem he kept finding: capable marketers trapped inside companies that never built them a department.

THE DISCLOSURE

Said plainly: BMD sells what this report recommends. That is exactly why every claim in it carries a source you can check without us, and why the method is published in enough detail to run without us. Judge the argument by its receipts.

Let's build it properly.

This report opened with two questions: how many marketers do you employ, and what did they bring in last quarter? Twenty-nine sections later you know why the second answer was slower. The function was assembled, never built. The fix is not a bigger team or a smaller one. It is four properties and a sequence.

So flip the counting question, and keep the flip:

> THE FLIP
>
> *Stop counting marketers. Decide who owns the system. Then count.*

START WITH THE 5-MINUTE ASSESSMENT

buildingyourmarketingdepartment.com

Or start with a baseline conversation about your marketing department.

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