ANALYTICAL REPORT · DATA AS OF 12 AUG 2026

Who owns the Saudi real estate customer's attention?

And what do they do with it? 32 real estate players tracked, 12 analyzed in depth, and a full 90-day Instagram audit across five companies.

32	12	90	5
PLAYERS	IN-DEPTH	DAYS	COMPANIES

ABDULRAHMAN ALDAWOOD
Marketing & Brand Building

The buying journey changed. Most of the toolkit didn't.

Ten years ago a property buyer's journey started at a showroom or a billboard and ended with a sales rep. Today it starts on a phone and is nearly finished there: a project seen in a short clip, prices compared in an app, a developer's account scrolled to judge credibility before a single word is read. By the time the buyer reaches the showroom, half the decision is already made.

Four schools compete for this customer: mega-projects with audiences in the millions, listed developers with polished production, family-run developers who talk in units and prices, and property platforms that own daily usage. Each defines success differently, and none of them puts the whole picture in one place.

923 vs 7
Engagement on the same post, launch day vs. a normal week, same account

73% from 21%
Of NHC's 90-day engagement came from a fifth of its posts

0.023%
NHC's median Instagram engagement rate over 90 days

3 of 11
Major accounts that make their service number obvious at a glance

Context: Saudi internet penetration is 99.6%, and 61.3% of users spend 7+ hours online daily. Source: Saudi Internet 2025, CST.

Massive audiences, wrong place to decide

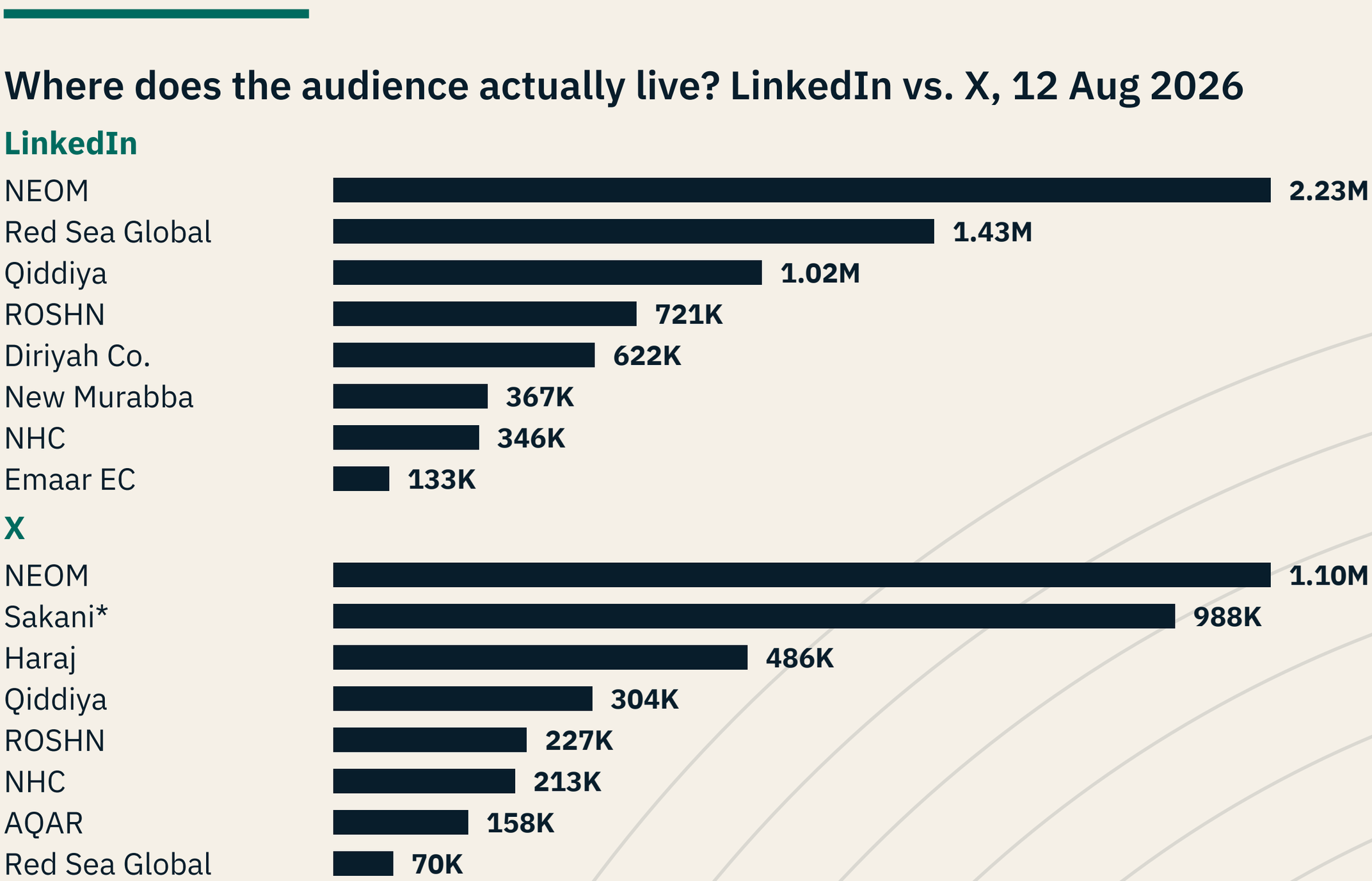


Figure 1: top eight audiences on LinkedIn and X as of 12 Aug 2026. * Sakani is a government platform, shown as a reference ceiling.

LinkedIn leads by volume: NEOM 2.23M, Red Sea Global 1.43M, Qiddiya over a million. But it's a professional audience built up through hiring waves and global news — prestige, not buying intent. X shows the same pattern more starkly: the biggest accounts are a national project, a service platform, or a classifieds site, and the first unit-selling developer shows up at roughly a fifth of the leader's size.

On Instagram the gap closes, and real life beats production

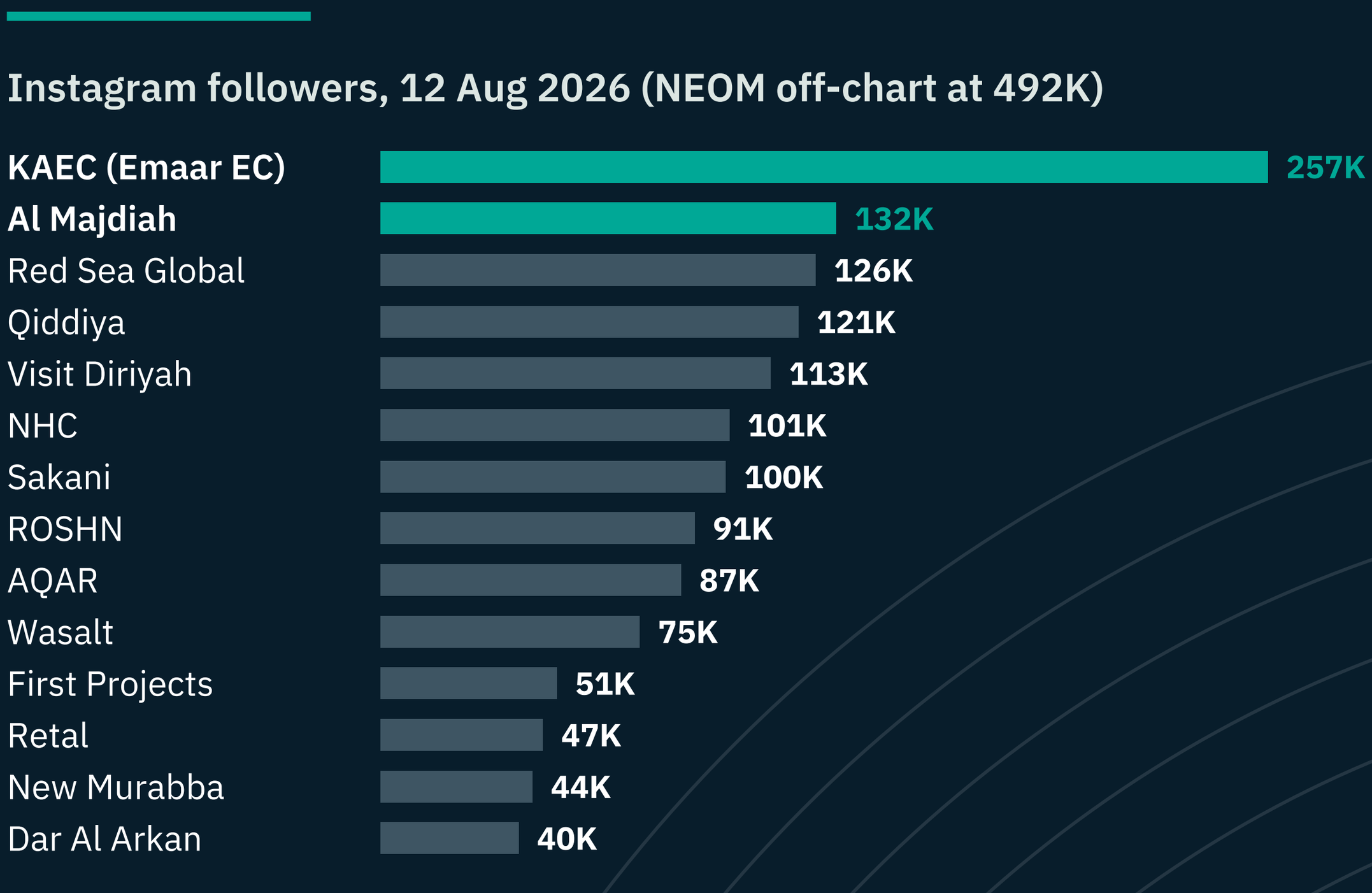


Figure 2: Instagram followers as of 12 Aug 2026. NEOM is off-chart at 492K.

NEOM leads here too, but the gap that was in the millions on LinkedIn shrinks to tens of thousands. King Abdullah Economic City outpaces every developer by a quarter-million followers for one reason: it posts real daily life. Al Majdiah, on a fraction of ROSHN's budget, beats it by over 40,000 followers because its feed shows what a buyer wants to see — units, prices, handover dates. When a listing app outranks most developers themselves, this audience rewards usefulness and visual honesty, not company size.

Set the baseline first: 90 days, one measure

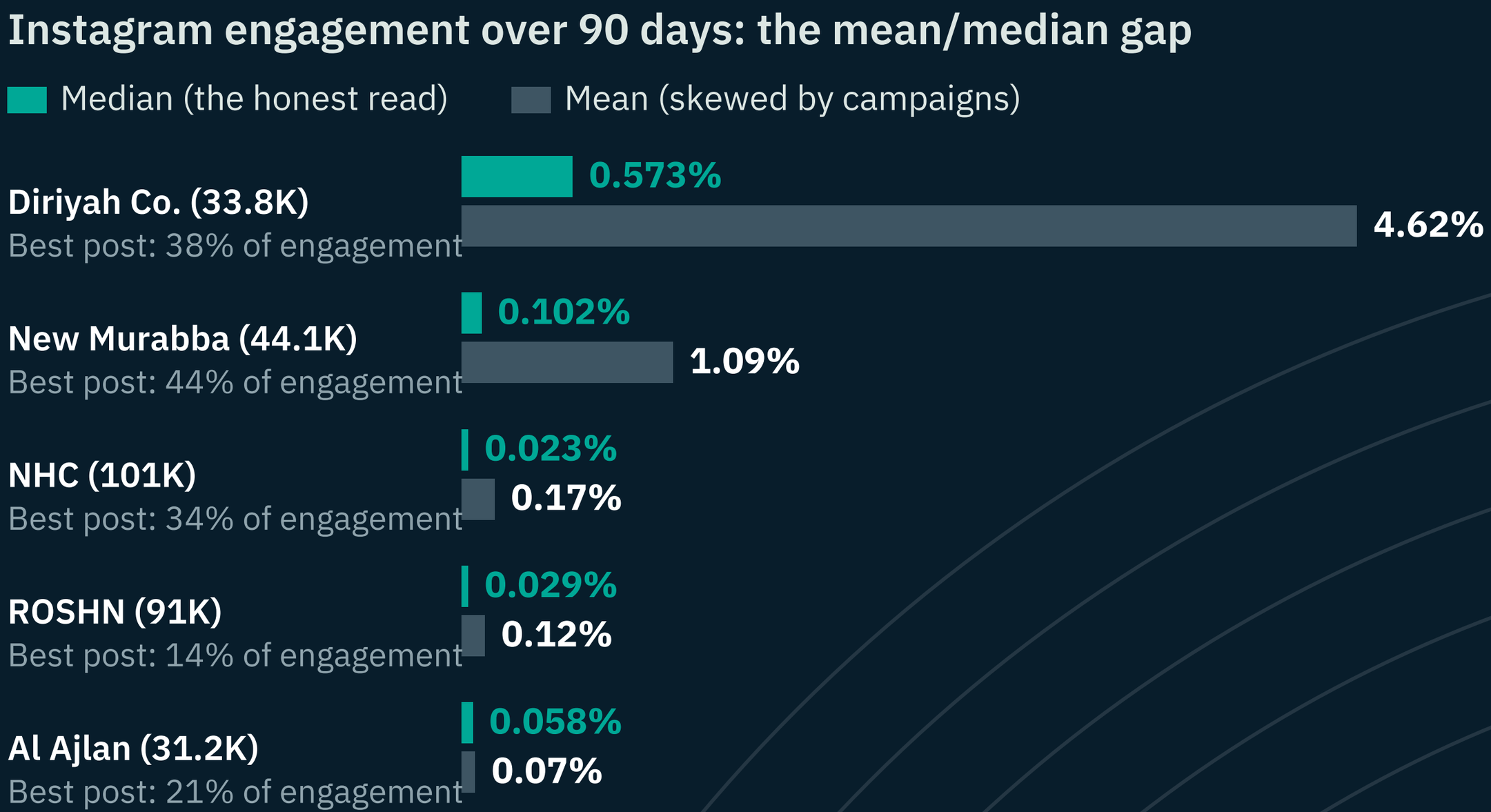


Figure 3: full 90-day post inventory for five companies on Instagram, 15 May to 13 Aug 2026, one measure for all.

The gap between mean and median, and the share of engagement from the single best post, both show performance concentrated in a handful of moments: NHC's best single post carried 34% of 90 days of engagement; New Murabba's, 44%. Reels were 21% of NHC's posts and drove roughly 73% of engagement — the winning format sitting unused by its own owner.

The one-day economy: a launch peak that never becomes a habit

Average per-post engagement on X, July–August 2026 (replies, reposts, likes)

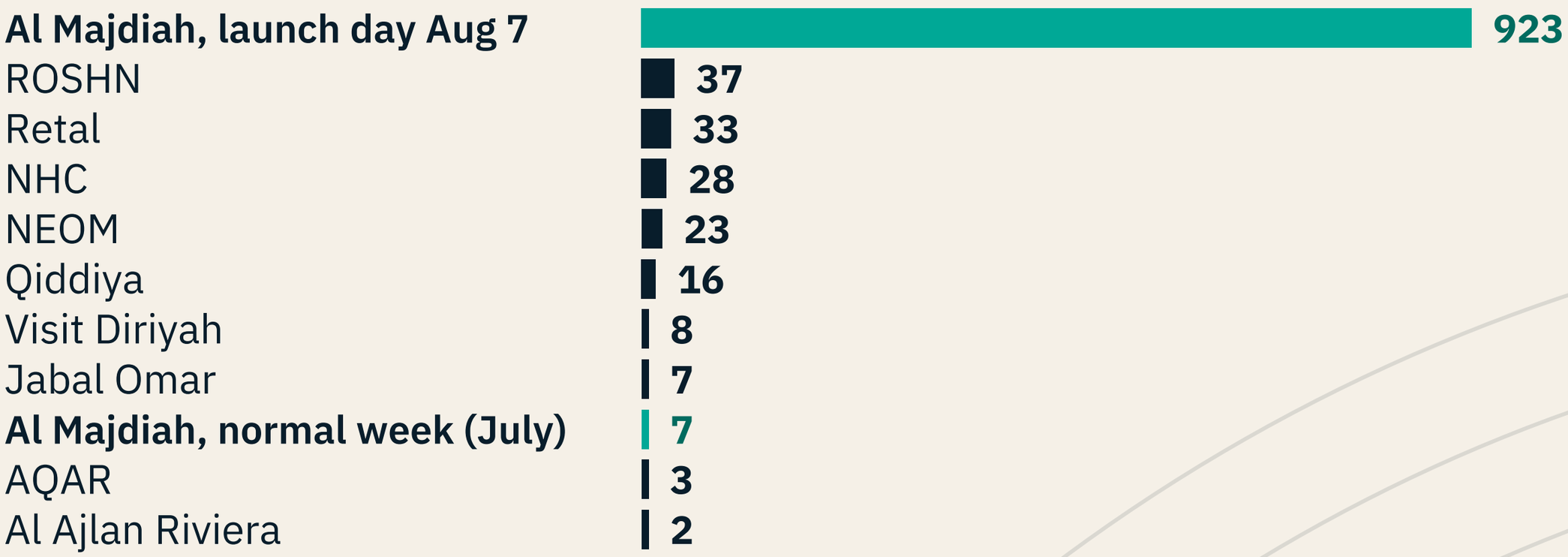


Figure 4: spot-check snapshots from X, 4 to 18 posts per account; read the large gaps, not the decimals. Al Majdiah's full-period average was 760, driven by one day. The only standardized benchmark is Figure 3.

Al Majdiah gave the market its clearest lesson this summer: on launch day, eight posts went out, some crossing a thousand likes. In a quiet week in July, the same account, same quality, sits at a handful of likes like everyone else. The best mega-project account outside campaign days pulls 37 engagements from an audience over 200,000; NEOM, the largest real estate audience in the region, pulls 23. I don't think the problem is the algorithm or timing. It's content that gives the reader no reason to stop scrolling. Whoever fills this gap owns something budgets can't buy: habit.

Video sells the experience, photos explain the unit

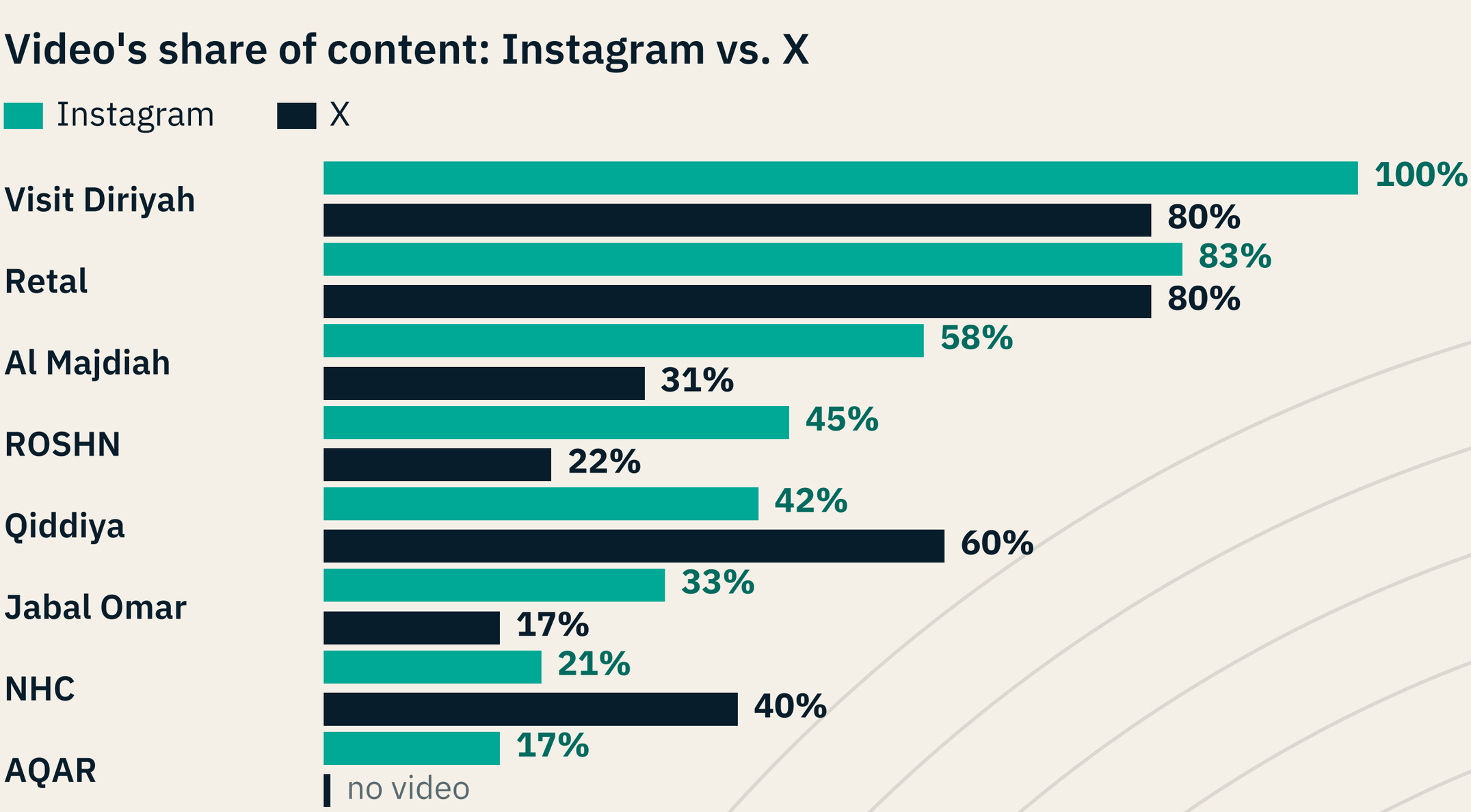


Figure 5: video share of content on Instagram and X. ROSHN and NHC Instagram figures come from the full 90-day audit; the rest from the last twelve posts.

Whoever sells an experience has made up their mind: Visit Diriyah posts Reels exclusively, Qiddiya leads with video. Whoever sells units is still split: Retal and Al Majdiah leaned into video, while NHC and AQAR get their numbers from photos and plain data. The rule I'd draw: video when selling a lifestyle, photos and information when selling a unit with a price and a date — the common mistake is reversing the two.

Production quality is inverted: the prettiest doesn't sell

Company	Photo quality	Video quality	Brand consistency	Product content
NEOM *	●●●●●	●●●●●	●●●●●	●○○○○
ROSHN	●●●●○	●●●●○	●●●●●	●●●●○
Visit Diriyah	●●●●○	●●●●●	●●●●●	●●●○○
Qiddiya	●●●●○	●●●●●	●●●●○	●●○○○
Al Majdiah	●●●●○	●●●●○	●●●●○	●●●●●
Retal	●●●●○	●●●●○	●●●●●	●●●●○
NHC	●●●○○	●●●○○	●●●●○	●●●●○
Al Ajlan Riviera	●●●○○	●●●○○	●●●○○	●●●●●
AQAR	●●○○○	●●○○○	●●●○○	●●●●●

Figure 6: single-analyst estimate against fixed definitions, not an objective multi-rater scale. Photo/video quality: craft, lighting and editing in the last twelve posts. Brand consistency: stability of color, type and templates. Product content: share of posts naming a unit, price, district or date. * NEOM's product-content score reflects its pre-sales stage, not a shortfall.

The finding that sums up the market: NEOM tops every quality mark, and AQAR is its mirror image. The two columns, mega-project production and family-developer honesty, have not met in a single account yet. That's exactly the subject of the next two pages.

Before the customer messages you: can they find the way in?

This isn't a response-time study; no one was contacted posing as a customer. What was examined is what an outside buyer sees: an advertised number, a clear service account, a working inquiry link. Ease of finding the path in, not speed once inside it.

The results were more uneven than expected: few accounts make the path obvious at a glance, and most rely on a “Discover” button and polished corporate links that don't start a sales conversation. Worse, not one account publishes a response-time commitment the customer can hold it to.

In a market where the average deal exceeds a million riyals, clarity before the first message is the first trust test. And the first brand to state a simple commitment — a one-business-hour reply to buying questions — will own that line alone among the accounts studied.

NHC

Clearest in the market: NHC_Care handle and a phone number up front

ROSHN

One unified number and an inquiry link on every surface of the account

Al Ajlan Riviera

Contact number pinned at the top, exactly where a visitor's eye lands first

Rest of the sector

A “Discover” button and corporate links, no stated response time

Source: public audit of visible contact paths across eleven major accounts, as any visitor would see them, 12-13 Aug 2026.

The empty square

Whitespace map: an analytical read of content mix

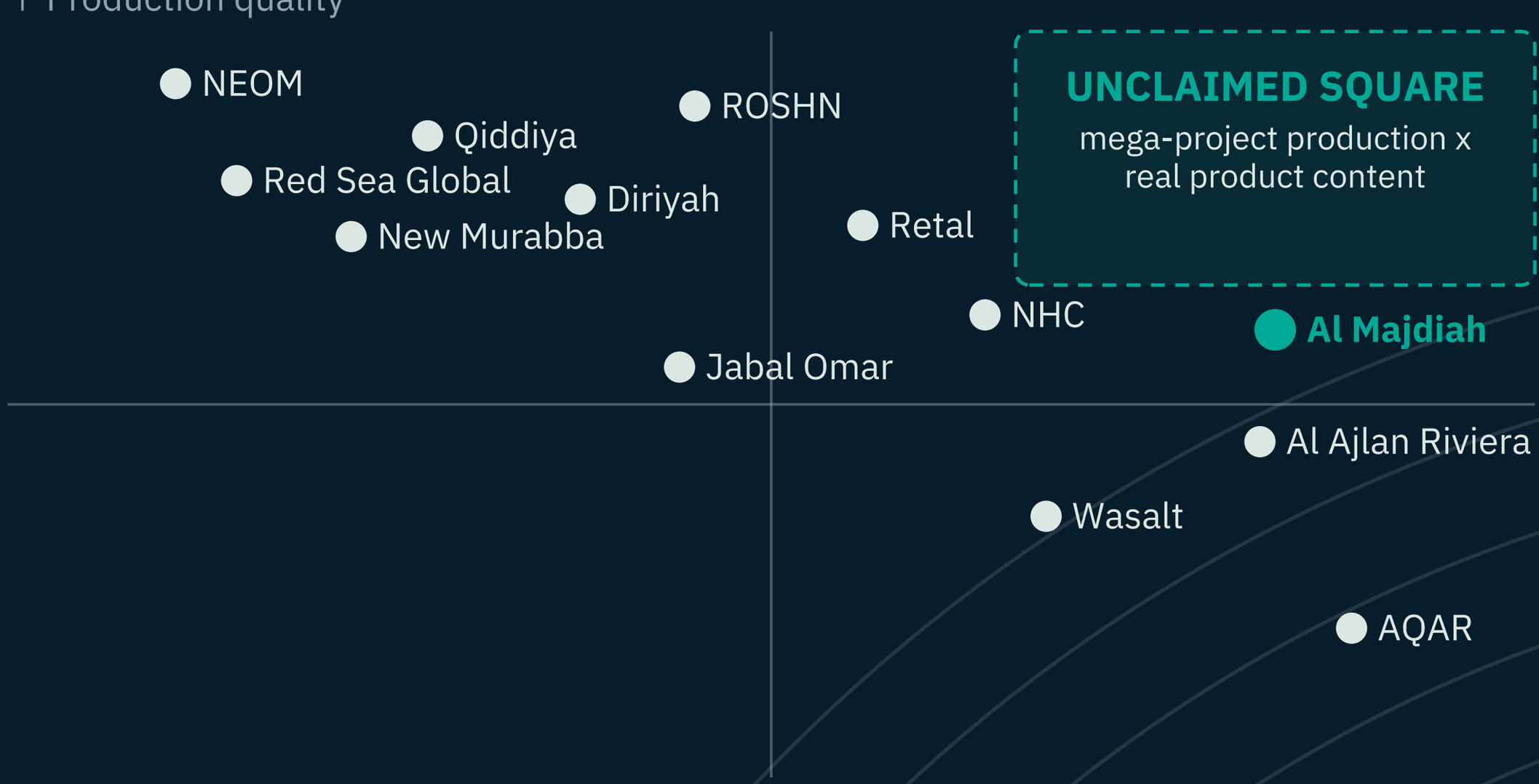


Figure 7: each brand plotted on product truth (horizontal) vs. production quality (vertical). An analytical estimate, open to debate line by line.

Top-right of the map is unclaimed: mega-project-level production paired with family-developer-level product honesty. Claiming it doesn't take NEOM's budget; it takes an editorial decision that every post says something real about the product, and discipline to keep a rhythm that doesn't stop when the campaign does. This is the cheapest competitive edge available in the sector today, and the fastest to disappear once a competitor finds it first.

Three practical takeaways, each with its own metric

01 Assign channels by role, not by habit

Make Instagram your primary sales and community channel; give LinkedIn genuine thought-leadership content from engineering, supply chain and career stories; treat X as a service and announcement channel, measured like advertising.

Metric: everyday engagement — the average rate in campaign-free weeks, the closest proxy for lasting relevance.

02 Build a rhythm between launches

Two genuine product posts a week, each naming a specific unit, price, district and handover date, at a quality that doesn't drop once the campaign ends. This is the empty square, and claiming it is a decision before it's a budget.

Metrics: product-content share (how many of every ten posts name a unit, price or date), and comment seriousness (share asking about purchase, location or price — a manual read of twenty comments a week is enough).

03 Close governance gaps before they become a story

Today the market has a listed company's website pointing to a hijacked account, a broken link at a major developer, and a lookalike domain for a competing brand selling something else.

Metric: channel integrity — a quarterly audit of every account link, costing an hour, against a reputational cost that's hard to repair.

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CLOSING

The market is good at noise. The opportunity is in staying.

The sector is good at engineering a successful launch day; the numbers in this report prove it. But not one complete model showed up in the sample still present at the same level on day eleven after launch. The huge audiences exist, the luxury production exists, the real product exists. Each sits at a different end of the market, and no one has put them in one account.

Three questions I'll leave open for anyone running real estate marketing:

- Is your team measured on campaign engagement, or everyday engagement?
- Which channel deserves to be the home you invest in for three straight years?
- Who on your team has the authority to pull a beautiful post that says nothing about the product?

A necessity before the first ad.

About this report

Abdulrahman Aldawood. Marketing and major launches in the Saudi market: built nera's marketing at Al Rajhi Bank from zero, worked on launches with ROSHN and Almosa Group, and behind more than twenty TV ads whose campaign reach exceeded thirty million viewers, winning a Muse Award. This reading is independent, built on public data documented on 12 August 2026, and represents no organization.

linkedin.com/in/aaldawood

Documentation: every figure is from the account's own official page on 12 Aug 2026. Instagram audit: 15 May to 13 Aug, five companies. X snapshots: 4 to 18 posts per account across July and August. Contact paths: 11 accounts. Link records and capture dates are held by the report's author and available on request.

aldawood