

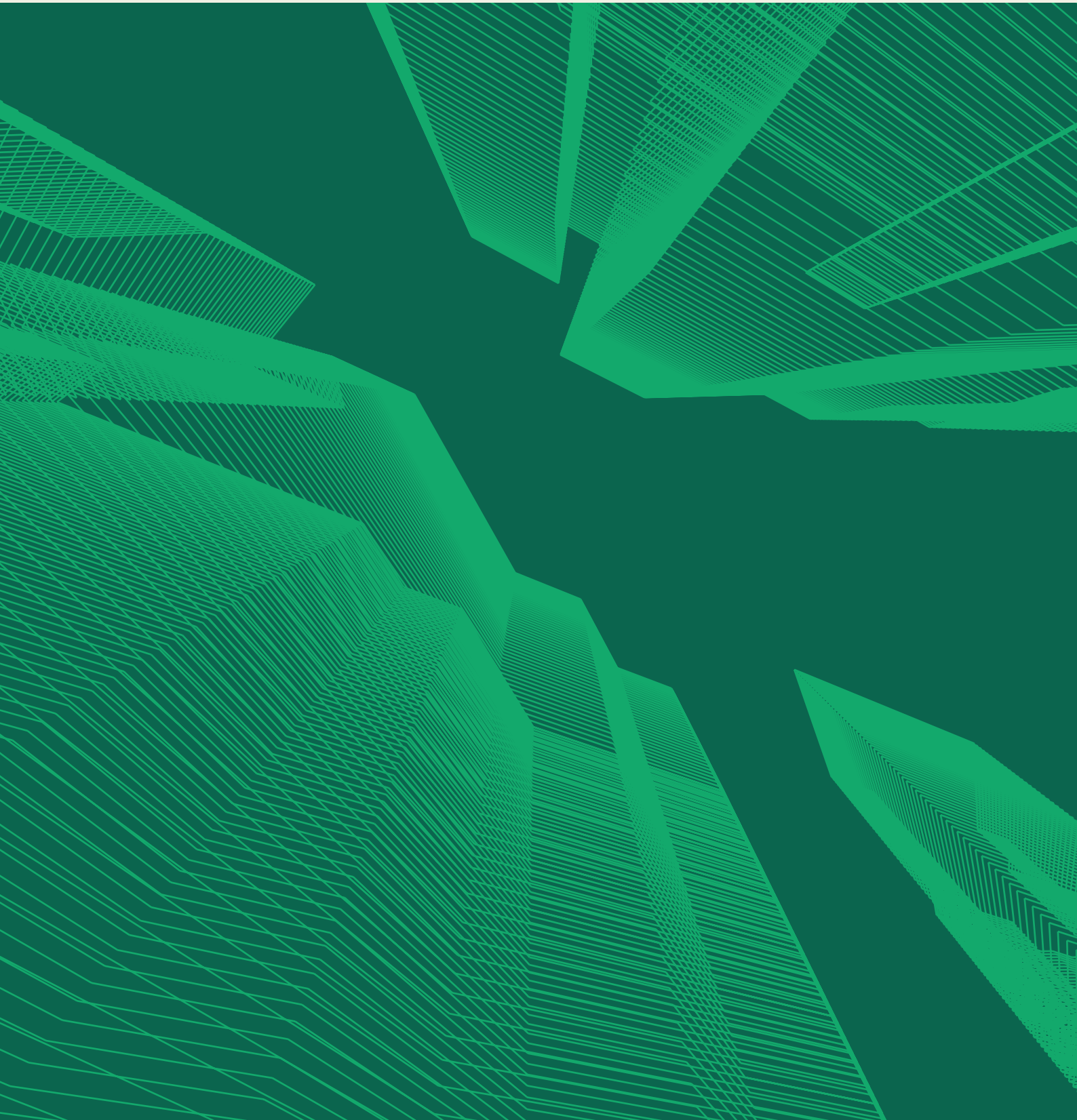
The Rise of Integrated Living in Saudi Arabia



Jan 2026

Monthly property perspective series

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REDEFINING RESIDENTIAL COMMUNITIES IN SAUDI ARABIA

Integrated living is fast becoming the new benchmark for residential success in Saudi Arabia. Developers must transition from product-led approaches to people-led strategies, embedding lifestyle, community and experience into development from the outset. Early strategic advisory, aligning vision, design, market positioning and commercial strategy, will be essential in delivering communities that meet evolving expectations while remaining financially viable.

From housing supply to quality of life

Vision 2030 has reframed housing policy away from volume delivery alone towards liveability, affordability and long-term social outcomes.

Rather than delivering residential, retail and social uses as adjacent components, integrated communities are intentionally planned as cohesive ecosystems, combining housing with education, retail, leisure, healthcare and public spaces. Indeed, our 2025 Saudi Report confirms the growing preference for amenity-rich, well-connected neighbourhoods amongst both Saudi nationals and expatriates.

Urbanisation and lifestyle change

Rapid population growth and urban expansion, particularly in Riyadh, Jeddah and the Dammam Metropolitan Area, have placed pressure on traditional, low-density residential models. Saudi Arabia is now more than 85% urbanised, a proportion expected to rise further through to 2030.

Unsurprisingly, the nation's demographic profile remains a powerful structural driver of demand for integrated living. More than 60% of the population is under the age of 35, creating a large cohort of younger, aspirational households entering the housing market with expectations that differ from previous generations, with a greater emphasis on community living, as evidenced in our 2025 Saudi Report.

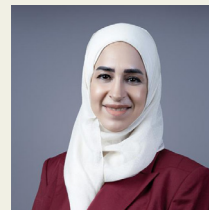
Riyadh's metropolitan population has increased from approximately 6.5 million in 2015 and will close in on 9 million by 2030 according to our estimates, and already accounts for over 20% of the Kingdom's urban population. These dynamics have contributed to longer commute times, rising land values and changing household structures, accelerating demand for self-contained and walkable neighbourhoods.

How residential communities are evolving

Residential masterplans are moving away from villa-dominated layouts towards a broader mix of housing types, including townhouses and low-rise apartments. This shift is driven by affordability pressures, rising land values and changing household structures, particularly among younger and first-time buyers.

Amenities have transitioned from optional enhancements to core determinants of residential value. Access to parks, schools, healthcare, sports facilities and local retail now ranks alongside price and location as a key influence on purchasing decisions. Developments that embed amenities from the outset are typically achieving stronger demand and improved absorption.

The quality of the public realm, covering streetscapes, walkways, open spaces and communal areas, is playing a growing role in shaping pricing resilience and sales velocity. Developments with well-designed public spaces are better positioned to sustain demand, particularly during periods of market adjustment.



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