ANNUAL REPORT

The 2026 State of Real Estate Marketing Report

462 agents spent a combined **85 hours** answering **30 questions** across AI, content, listings, and brokerage benchmarks. The most comprehensive look at what is actually working in real estate marketing today.

PRODUCED IN PARTNERSHIP WITH

KnwnLocal | Listing Leads | BEACON

FOREWORD · A NOTE FROM THE PUBLISHER

A note before you dig in.

We built this report because we got tired of guessing.

Between the three of us, we've spent the better part of two decades talking to agents about marketing. What they're trying. What's working. What's burning money. This report is what happens when you stop asking ten agents and start asking five hundred.

Every agent we talked to in 2025 had a theory. Zillow is broken. TikTok is dead. AI is going to change everything. YouTube is the next gold rush. Direct mail doesn't work anymore. Email is a graveyard. Some of those theories are right. Some are spectacularly wrong. And the only way to know which is which is to ask 462 working agents what they're actually doing, what's actually generating leads, and where they're actually putting their money next year. So we did.

The agents in this dataset closed real transactions in 2025. Most of them more than $5M worth. Many of them more than $40M. They're not survey-takers. They're operators. And what they told us about what's compounding, what's collapsing, and what's hiding in plain sight was more interesting than we expected.

The biggest finding in the entire dataset isn't a single number. It's a pattern: agents who treat marketing as a long-term compounding asset: content, email, sphere: outperform agents who treat it as a transactional spend. By a lot. By orders of magnitude in some cases.

The second biggest finding is that most "X is dead" narratives in real estate are wrong. They're projections from people who aren't paying for the thing. Direct mail works: for people who actually pay for it. Zillow works: for people who actually pay for it. The narrative collapses when you segment the data.

The third is that the gap between agents who say they're going to invest in something and agents who actually ship anything is enormous. Half of the agents planning to invest more in YouTube next year haven't published a single long-form video this month.

Read it however you want. Whatever you do with it: don't read this and do nothing.

Chris Smith, Jimmy Mackin & Andrew Bayon

Co-founders of Beacon, Listing Leads, and Knwn Local

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ABOUT THIS REPORT · METHODOLOGY

The dataset.

462 complete responses from working real estate agents in North America, collected via Typeform between May 7 and May 20, 2026. Respondents answered 30 questions covering role and business shape, marketing spend, AI usage, content production, channel performance, and forward-looking 2026 investment intent. Median completion time: **11 minutes, 29 seconds.**

Who answered. The respondent base skews toward established practitioners. 58% have been selling real estate for 16 or more years. 82% have been at it eight years or more. 41% closed $10M or more in the trailing twelve months. 5.2% cleared $100M. Solo agents make up the largest single cohort.

What this report is not. This is not a probability sample. Respondents opted in. Findings reflect agents engaged enough with marketing to spend 11 minutes thinking about it. That's a feature for a report about how marketing actually works: but it means findings describe an engaged-operator population, not the full NAR membership.

How we analyzed. Cross-tabulations were run on every meaningful pairing of variables. Findings passed two filters: a minimum cell size of 20 respondents per cohort, and a directional pattern that held across adjacent segments.

Brokerage comparisons. Eight cohorts had sufficient n for head-to-head analysis: Berkshire Hathaway, Coldwell Banker, Compass, eXp, Independent Brokerages, Keller Williams, RE/MAX, and REAL.

Survey instrument. The full 30-question survey is reproduced in the appendix.

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SECTION ZERO · RESPONDENTS

Who answered.

462 working agents. 30 questions. 11 minutes, 29 seconds on average.

Before any finding in this report, the demographics of who produced it. The respondents in this dataset are established practitioners: listing-tilted, marketing-engaged, and broadly representative of the working-agent middle of the market. They are not a probability sample of the NAR membership. They are the agents who chose to spend twelve minutes telling us how they actually run their businesses.

The pages that follow establish who they are, what kind of book they ran in 2025, and what they spend each month to maintain it. Every finding in the four sections that follow rests on this foundation.

EXECUTIVE SUMMARY

Five things worth knowing before you read another page.

01

Marketing is no longer overhead. For half of real estate, it’s the business.

46.5% of agents say they’d lose more than a quarter of their business if marketing stopped for twelve months. 21% say half or more would vanish. Only 26% are confident they’d lose less than a tenth. The agents most exposed to marketing risk are not beginners. They are the ones who built compounding assets over a decade and now depend on them.

02

AI saved real estate hours, not jobs.

63% of agents now use AI every day. 86% of every AI task is text: listing descriptions, emails, market research. The transformative use cases — video, voice, end-to-end automation — are still a rounding error. 32% of agents say AI now saves them six or more hours every week, the equivalent of a full working morning returned to the calendar. Daily use is settled. Leverage is the moat.

03

Content is a compounding asset. Most agents aren’t measuring it.

60% of agents don’t track content-to-deals attribution at all. Among those who do, the gap between year one and year ten is 6×. Agents with 4+ years of consistent creation and 5+ short-form posts per month report “a lot of deals” at **9× the rate** of agents with neither habit in place.

04

Most marketing channels deliver zero leads to most agents.

13 of the 21 channels measured in this report deliver zero leads to 70% or more of the agents using them in a typical month. The portals and ad networks dominate the failure list. But the failure narrative collapses under segmentation: agents who actually pay for Zillow rate the leads good or excellent at **10× the rate** of free users. Direct mail at **7×**. The “X is broken” story in real estate is almost always told by people who aren’t paying for X.

05

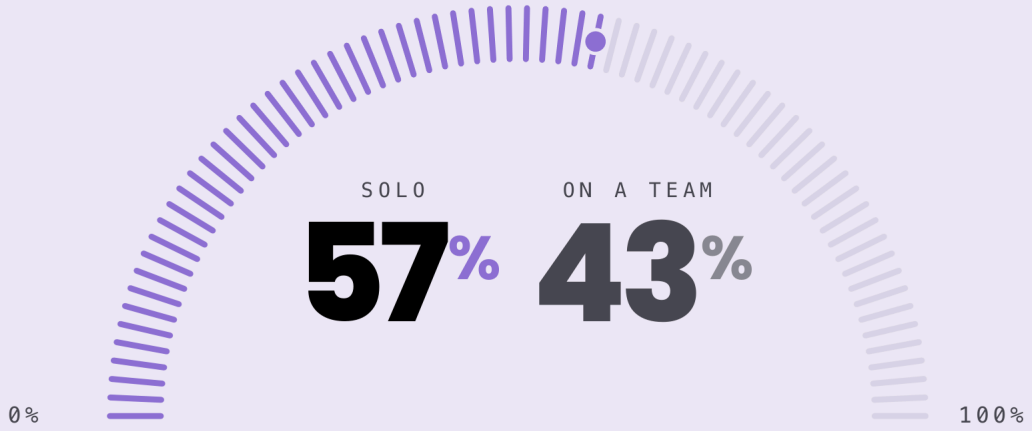
The 2026 budget is moving from rented audiences to owned ones.

Agents are voting with their budgets. AI gets the biggest “invest more” vote at 60.8%, followed by YouTube at 61.6% and short-form video at 41.5%. Zillow and Realtor.com are the only channels where more agents plan to cut than grow. The aspiration gap is the open risk: half of the agents who plan to invest more in YouTube next year haven’t shipped a single long-form video this month. Intent is cheap. Execution is the moat.

TEAM SIZE

Solo Agents vs Teams.

25.4% have 2–4 agents **10.9%** have 5–10
6.7% lead a team of 11+.

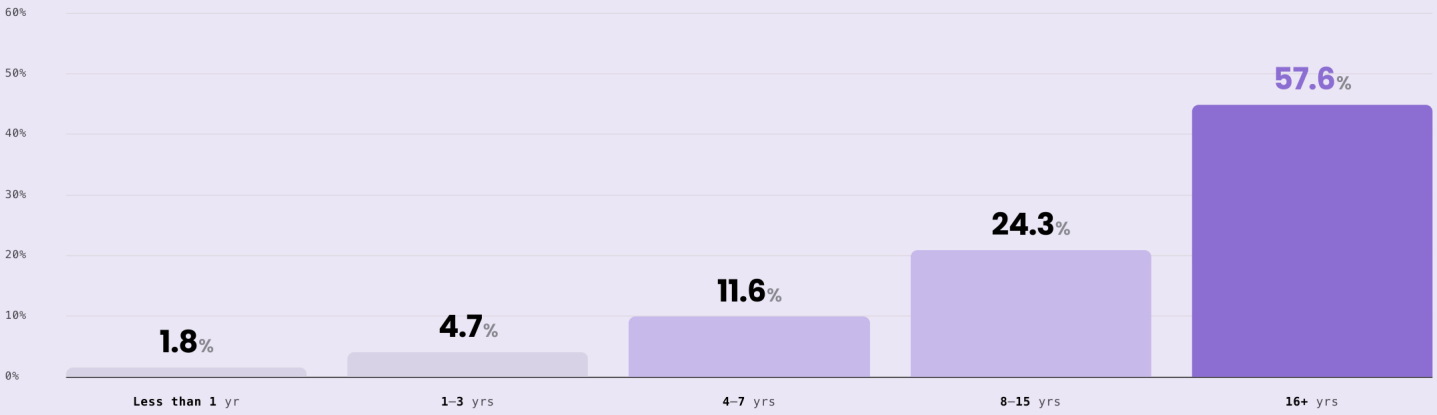


The split is closer than the public narrative suggests. The “everyone’s joining a team now” story is real at the trend line: but the field is still solo-majority by a meaningful margin. Most findings in this report that describe elite-tier operating models will describe behaviors that are structurally easier for teams. Solo agents and team agents are different businesses.

YEARS IN REAL ESTATE

58% Have Been Selling Real Estate for 16+ Years.

82% have been at it **8+ years**
Only **6.5%** are within their first three.

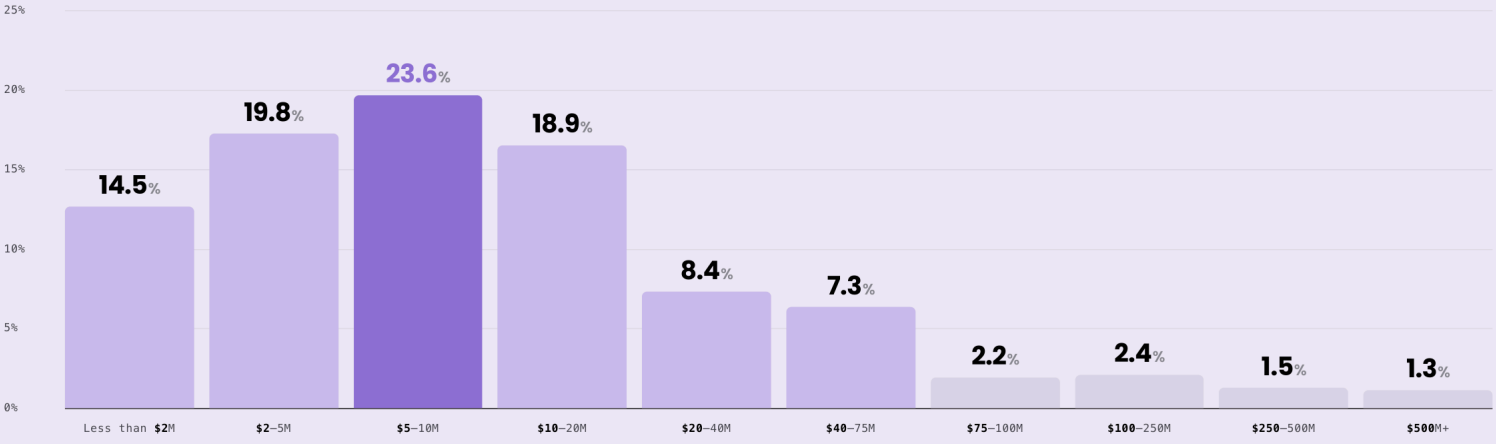


These are not new agents. The tenure distribution is the single most important caveat to apply when reading this report. The channels that these respondents rate highly have earned that rating across years of observation: not weeks. The findings on what works in 2026 are filtered through agents who have seen multiple market cycles and multiple “next big thing” narratives.

LAST 12-MONTHS TRANSACTION VOLUME

41% Closed $10M+ in Transaction Volume.

15% closed more than **$40M** **5.2%** cleared **$100M**

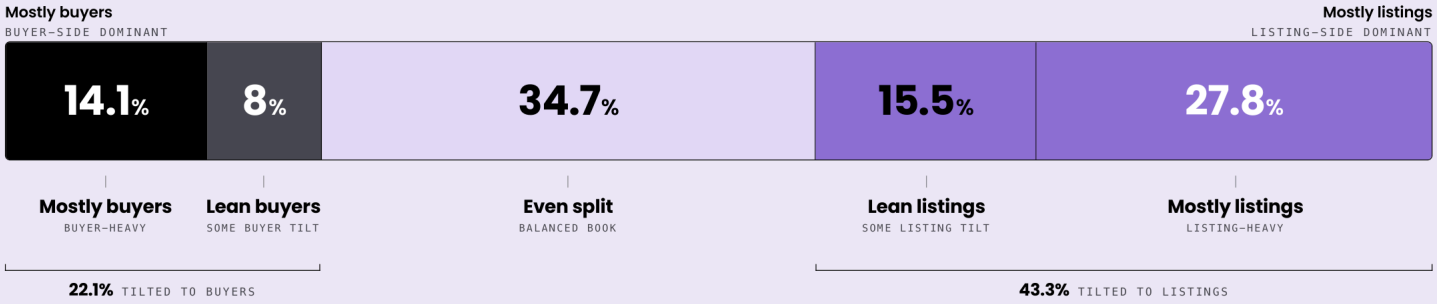


The production tier of the respondent base is meaningfully higher than the field-wide average. When this report describes what content cadence, channel mix, or AI workflow correlates with elite outcomes, the comparison group already contains a higher density of elite agents. For the working agent reading this report, that's a feature: the behaviors being measured are the behaviors of agents who are running businesses at scale.

BUYER VS. SELLER SPLIT

Twice as many agents leaned listings as leaned buyers.

A third, the largest single group, ran an even book.

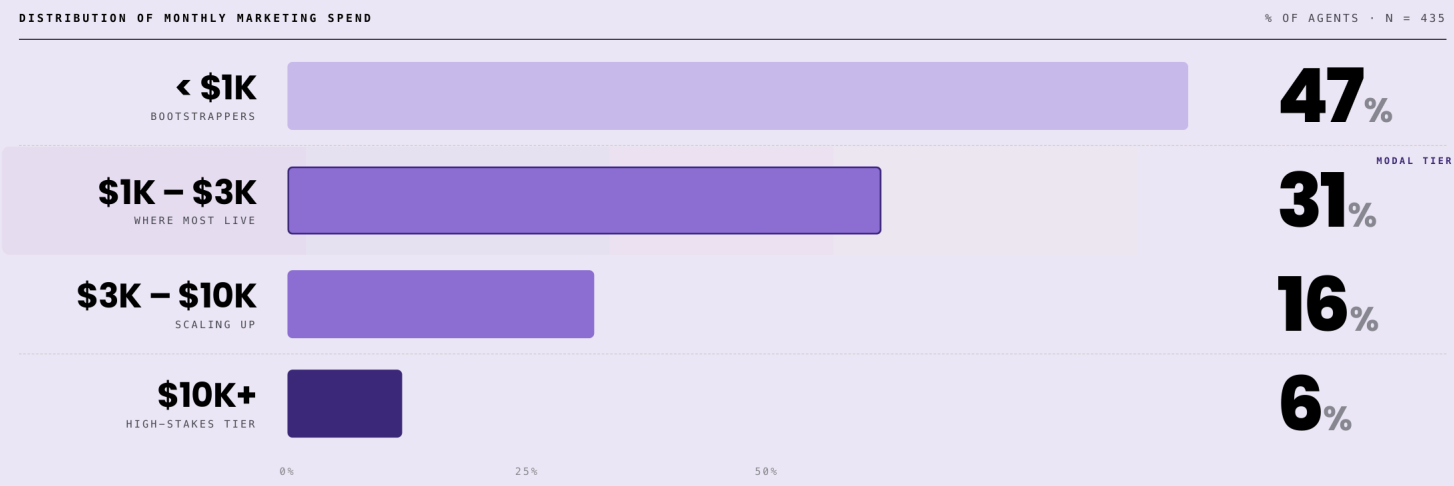


The business-mix distribution explains why this report's third section is named "Listings & Leads." Most respondents are listing-tilted operators. The channels that dominate the listing-source rankings: email, sphere, content: are being evaluated by agents who have spent careers building listing-tilted books. That context shapes every finding in Section Three.

MONTHLY MARKETING SPEND

53% of agents spend $1K+ a month on marketing.

Most agents live in the $1–3K band, with a small high-stakes cohort spending $10K+ a month.



47% are in the bootstrapper tier, spending under $1,000 a month. 31% sit in the modal $1,000–3,000 band. 16% are in the $3,000–10,000 tier. The high-stakes 6% who spend $10K+ are a distinct operating class and many of the elite-tier findings in this report disproportionately come from this cohort. For the median agent, wasted spend on zero-lead channels represents a much larger share of the budget than most industry commentary acknowledges.

SECTION ONE · AI

Daily for the top tier: optional for everyone else.

The new operating system for the modern agent.

The story of AI in real estate in 2026 is not the story you've been told. It's not about disruption, replacement, or the end of agents. It's something quieter and more useful: a tool that gives a specific tier of operators their afternoons back.

Most agents now use AI every day. Almost all of the work it's doing is text: listing descriptions, emails, market research, the writing tasks that used to eat hours of every working week. The flashy use cases: voice cloning, AI video, end-to-end automation: barely register in the dataset. For real estate, AI is a writing assistant with extraordinary range.

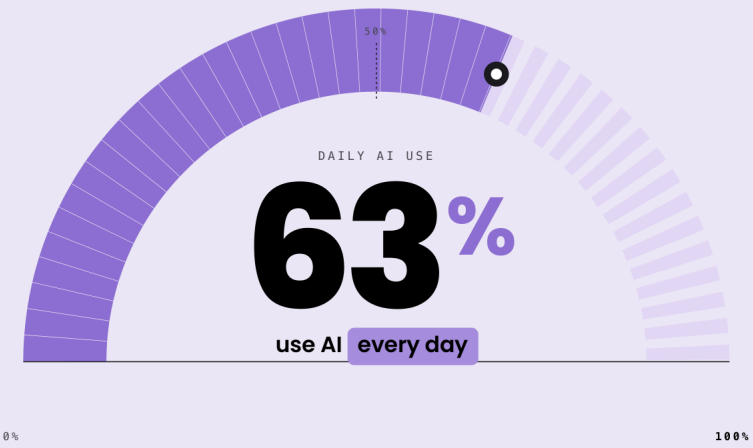
What separates the agents getting real leverage from AI from the agents using it casually is not which tools they use, or even how often. It's whether they've built the discipline to convert hours saved into hours redeployed. The data on hours saved per week is the most operator-revealing number in the entire report.

AI USAGE FREQUENCY

63% of agents use AI *every day*.

4 in 5 agents touch AI most weeks.

Daily	271 / 433	62.6%
Weekly	83	19.2%
Occasionally	37	8.6%
Rarely	24	5.5%
Never	18	4.2%

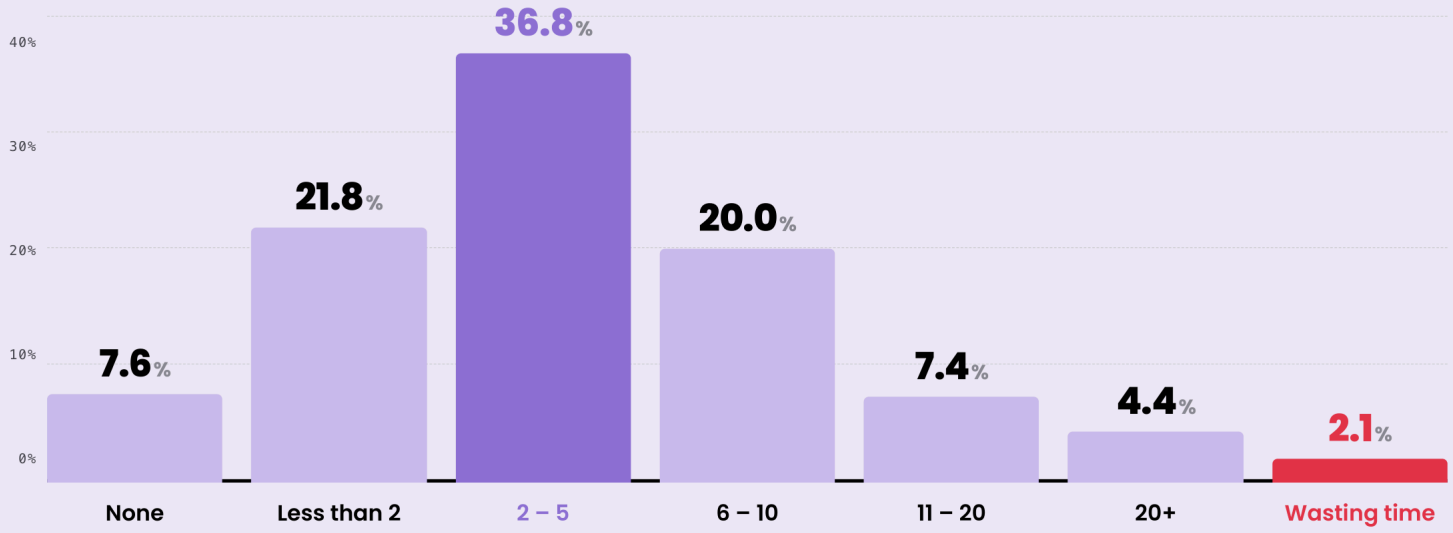


AI is no longer optional, edge-case, or experimental in real estate. It's daily infrastructure for a clear majority of working agents, including agents at brokerages not historically known for tech adoption. The interesting question isn't whether agents are using AI anymore: it's what they're using it for, and whether the hours it returns to their calendar are being redeployed or simply filled.

HOURS SAVED PER WEEK WITH AI

AI buys back 2 – 5 hours per week for most agents.

69% save at least one hour. **32%** save six or more.



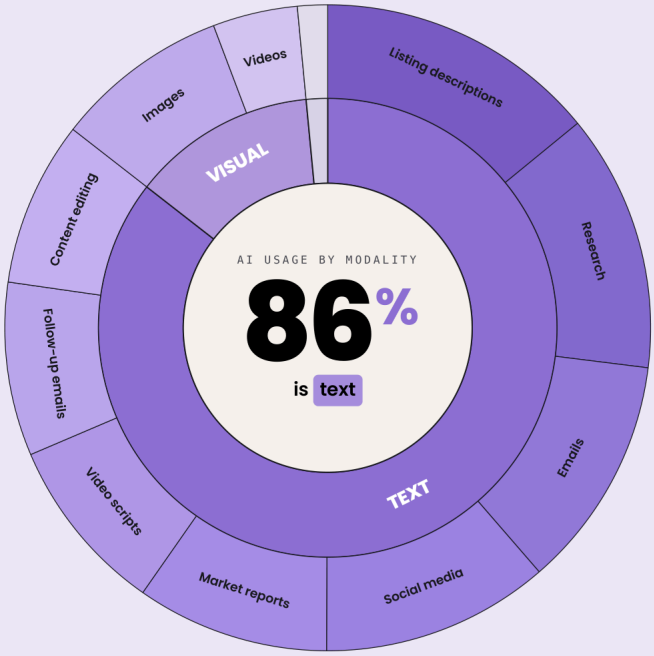
The mode lands at 2–5 hours per week. The 32% of agents saving 6+ hours are a distinct operational class: that's a full working morning, every week, returned to the calendar. Over a year, more than 300 hours. The gap between heavy-leverage AI users and the median user does not track neatly with tenure, brokerage, or transaction volume. It tracks with discipline: saved prompts, built workflows, and a clear sense of which tasks belong in the AI system and which don't.

AI USE CASES · GROUPED BY MODALITY

For real estate AI is still a text tool.

13% use AI for images and videos. **Audio** barely registers.

Text LISTINGS · RESEARCH · EMAILS · SOCIAL · REPORTS	**85.5%**
Visual IMAGES · LISTING PHOTOS · VIDEOS · REELS · AVATARS	**13.0%**
Audio VOICE NOTES · TRANSCRIPTS · CLONED CALLS	**1.5%**



Strip the marketing layer off the AI conversation and you find this: 86% of every AI task real estate agents perform is text. The visual use cases account for 13% of all tasks. Audio: voice notes, transcripts, the much-hyped cloned-voice calls: accounts for 1.5%. The agents getting real leverage from AI in 2026 are using it to compress time spent on writing tasks they were already doing, and redirecting the hours saved into the parts of the business AI can't touch.

KEY TAKEAWAYS · SECTION ONE · AI

Five things to remember from the AI section.

01

AI adoption is no longer the story. AI leverage is.

Daily use is now the dominant behavior across the industry. The question that discriminates is not whether agents are using AI but how many hours they're actually saving: and that varies wildly even among daily users. Adoption is table stakes. Leverage is the moat.

02

The highest-value AI use case in 2026 is still writing.

86% of every AI task agents perform is text. The agents extracting the most value are compressing writing tasks they were already doing into a fraction of the time, then redeploying the saved hours. Build the text workflow first. Everything else is bonus.

03

Six hours a week is the leverage threshold.

Agents saving 6+ hours per week are a different operational class. Six hours equals a full working morning every week: 300+ hours per year returned to the calendar. The transition from casual user to leverage tier is the single most impactful AI move available in 2026.

04

The next wave is video and voice: almost no one is practicing yet.

Visual and audio AI use cases account for 14.5% of all AI tasks, with audio at just 1.5%. The competitive advantage in 2028 belongs to agents who start building video and voice workflows in 2026.

05

Daily use without redeployment is augmentation, not leverage.

The most common AI failure mode: daily use without meaningful time savings. Augmentation is fine. But augmentation is not leverage. The agents winning with AI saved the hours and redeployed them into what AI can't touch: relationships, listings, conversations, judgment.

AI saves agents hours every week. Beacon turns those hours into listings.

The data in this section says 32% of agents are saving 6 or more hours every week with AI. That is a full working morning, every week, returned to the calendar. The question is what happens to those hours.

Most agents use AI to write faster. Beacon uses AI to win and keep listings.

Beacon generates AI-powered seller reports in minutes, not hours: market data, comps, social metrics, showing activity, and an executive summary your sellers will actually read. Agents who send Beacon reports spend less time updating sellers, field fewer "just checking in" calls, and give sellers documented proof that their agent is working.

The seller who can see every showing, every price trend, and every market move is a seller who trusts the process. A seller who trusts the process is a seller who stays the course when it matters. That is how you win listings. And that is how you keep them.

Your sellers can’t see your hustle. **Beacon** changes that.

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SECTION TWO · CONTENT

The compounding asset of top producers.

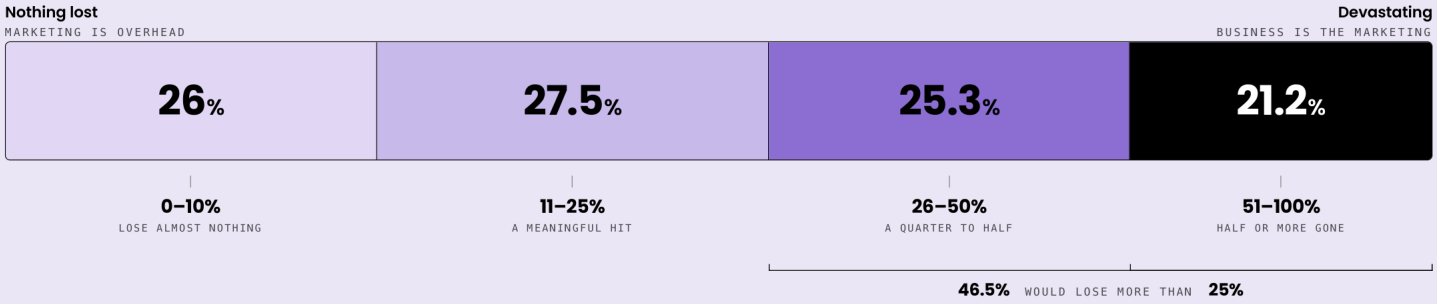
Content in 2026 is not a marketing tactic. It is a balance-sheet line item that compounds with consistent contribution and erodes with neglect. The first six months produce almost nothing. The first two years produce a little. The agents who have been at it for a decade report content driving the majority of their business at rates the rest of the field is not coming close to. The leverage is in the years, not in the videos.

What separates the elite tier of content-driven agents from the field is not talent, audience size, or algorithmic favor. It is, in nearly every cross-tab in this dataset, two variables: how long they have been creating consistently, and how often they ship. Each variable on its own produces a measurable lift. Together, they produce the single largest effect in the entire report: a 9× separation on “content drove a lot of deals.”

IF MARKETING STOPPED FOR 12 MONTHS

Without marketing nearly half would lose 25%–100% of their business.

21% say half or more of their book would vanish. Only 26% are confident they'd lose less than a tenth.



The agents reporting the highest exposure are not new agents: they are agents who have spent years building marketing engines that now produce a meaningful portion of their pipeline. The 26% who would barely notice are not necessarily better at relationships. Many simply haven’t built a marketing engine yet, which means they have no marketing engine to lose. Their resilience is not a strategic position. It’s a vacancy.

DO PAST CLIENTS / SPHERE ENGAGE WITH YOUR CONTENT?

Past clients are paying attention.

Only 6% say they don't.

85%

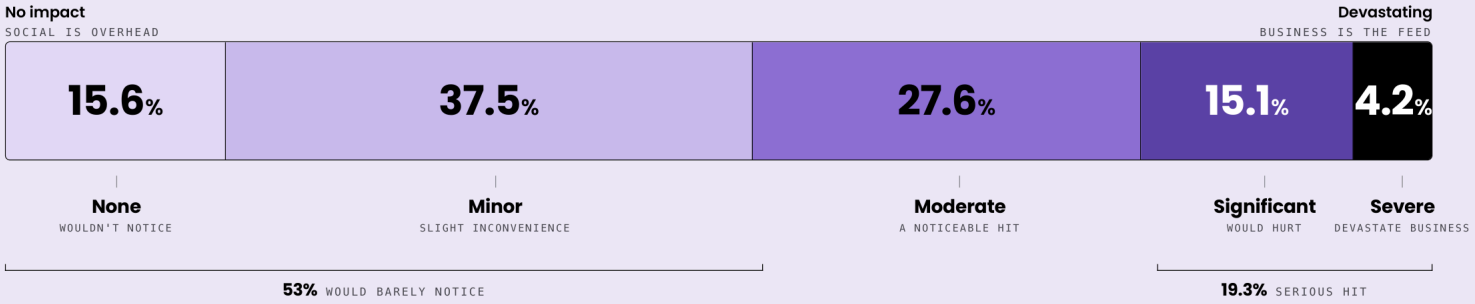
of agents say their sphere engages with their content.

The agents who post more frequently know it, because they see the signals every week. The agents who post infrequently don't, because the signals are quiet between posts. The biggest barrier to content producing business outcomes for most agents is not whether the audience exists. It is whether the agent shows up consistently enough for the audience to stay warm.

IF SOCIAL MEDIA DISAPPEARED TOMORROW

If social media vanished 47% would take a hit.

53% say they'd barely notice. Just 4% expect a devastating impact on their business.



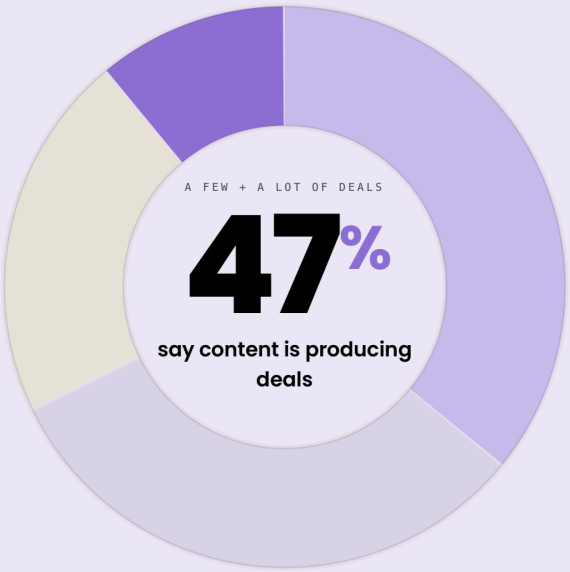
On the previous page, 85% of agents say their sphere engages with content. Here, only 19.3% say a serious hit would land if social media disappeared overnight. The gap is the entire opportunity. Most agents are posting into the feed. They are not building anything they own outside it. The 19.3% who would feel a serious hit are the agents who have crossed from “I post sometimes” to “this is a business asset.”

HAS CONTENT CREATION LED TO DEALS?

Only 1 in 9 say content drives a lot of deals.

A plurality have closed **a few** deals from content. A third haven't seen one yet, and one in five aren't even sure.

A few deals IT HAS PRODUCED SOME BUSINESS	**36.0%**
Not yet HASN'T CLOSED ANYTHING	**31.8%**
Not sure CAN'T ATTRIBUTE ONE WAY OR THE OTHER	**21.2%**
A lot of deals CONTENT IS PRODUCING MEANINGFULLY	**11.0%**

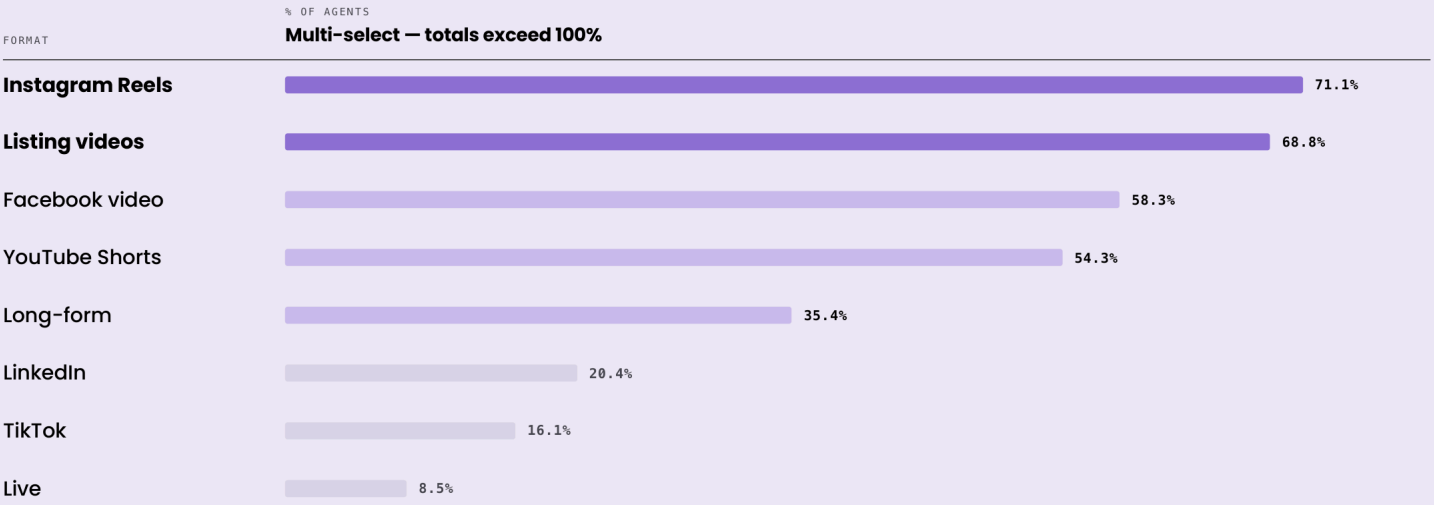


The headline numbers on content's business impact are underwhelming until you read them through the right lens. 60.7% of agents either don't track deal attribution at all or estimate less than 10% comes from content. They've been getting deals from content all along: they just never built the discipline to count. The field-wide effectiveness of content is almost certainly understated in every dataset that has ever measured it.

VIDEO FORMATS USED · % OF AGENTS

Short-form rules. Long-form and live still scare most agents off.

Instagram Reels and listing videos top the list, both above 68%. Only 1 in 3 publish anything long-form; fewer than 1 in 10 go live.

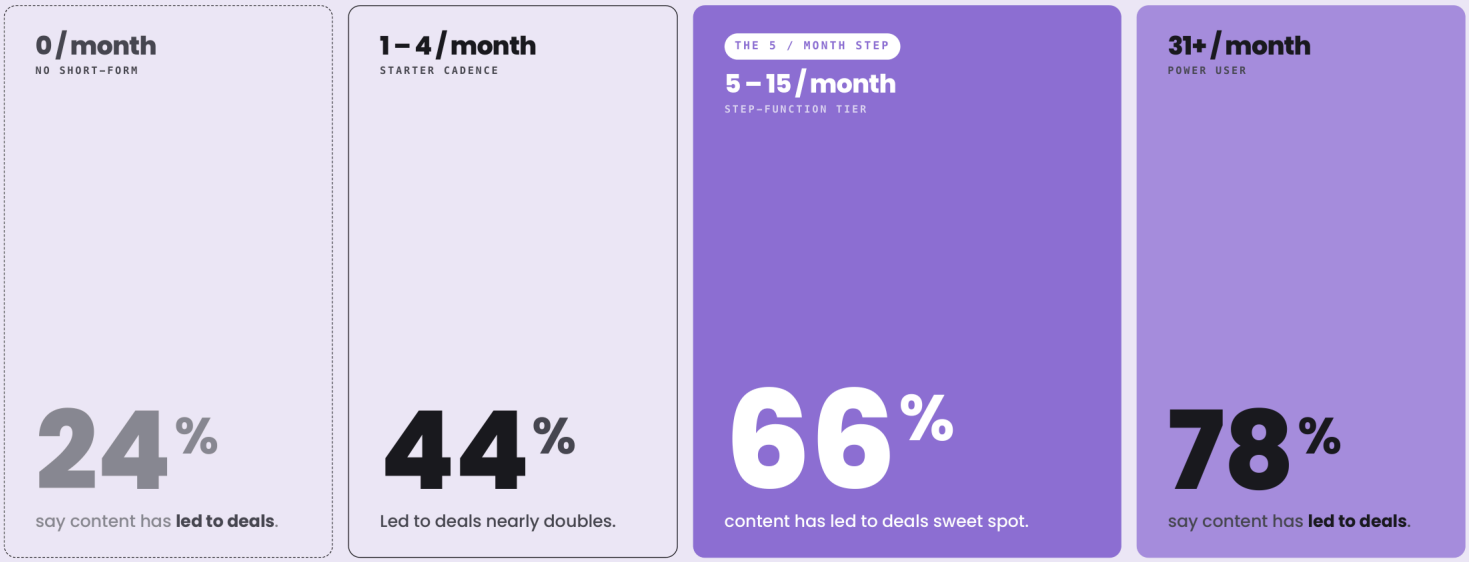


The 9:16 vertical format has won the day-to-day output war. Instagram Reels top the list, followed closely by listing showcase videos and YouTube Shorts at 54.3%. Long-form: 10+ minutes, requiring a real sit-down commitment: is published by only 35.4% of agents in a typical month. Live video, despite years of hype, barely registers. The medium almost no one is producing is also, as the rest of this section shows, the medium that produces the highest-leverage business outcomes per unit shipped.

SHORT-FORM VIDEO CADENCE × CONTENT-TO-DEAL ATTRIBUTION

Short-form video frequency has a 3.25x increase on deals.

The steepest jump happens at 5+ per month (critical threshold).



Zero posts per month: 24% say content has led to deals. 1–4 per month: 44%. 5–15 per month: 66%. 31+ per month: 78%. The big unlock is not volume: it's the move from sporadic to consistent. Getting to five short-form posts per month is the single highest-leverage cadence shift any agent can make in 2026. Content-driven deals nearly triple from the zero tier to the 5-per-month tier, and the curve continues upward with no sign of diminishing returns.

VERTICAL VIDEO · PLATFORM ADOPTION BY REAL ESTATE AGENTS

TikTok is dead in real estate. Vertical video isn't.

The same 9:16 format that 65% of agents refuse to touch on TikTok is the #1 video format they publish on Instagram.

DEAD IN REAL ESTATE

TikTok

% WHO NEVER USE IT

65%

Never used the platform.

THRIVING

Instagram Reels % of video creators using

71%

The most-used video format in real estate.

THRIVING

YouTube Shorts % of video creators using

54%

More than half publish YouTube Shorts.

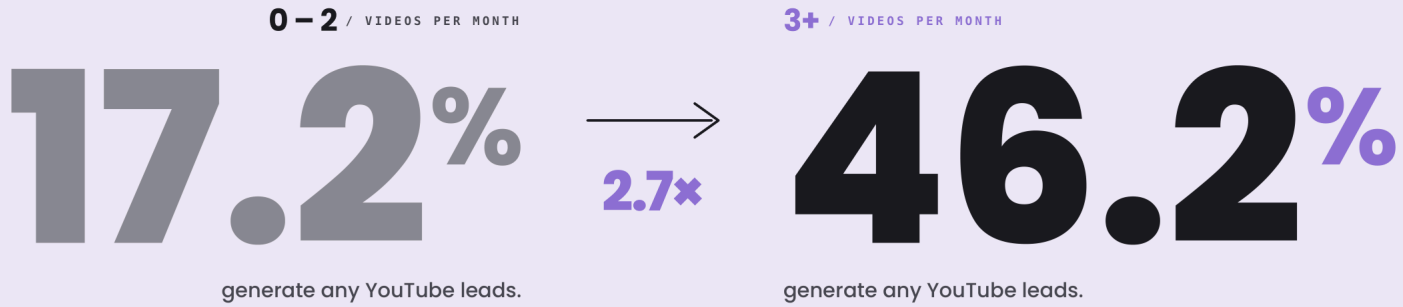
94% Among the agents who do use TikTok, 94% get zero leads from it.

The same 9:16 format that 65% of agents refuse to touch on TikTok is the #1 video format they publish on Instagram. Format choice and platform choice are separate decisions. Most agents conflate them, and the conflation costs them time on platforms where their audience doesn't live. Short-form vertical video works for real estate: on Instagram and YouTube Shorts. TikTok, for real estate lead generation purposes, is not the venue: 94% of agents who do use it generate zero leads.

LONG-FORM VIDEO CADENCE × YOUTUBE LEAD GENERATION

Long-form has a far lower threshold than short-form for lead generation.

YouTube tipping point is 3+ long-form videos / month.



Zero to two long-form per month: 17.2% of agents generate any YouTube leads. Three or more per month: 46.2%. Each long-form video carries more weight than a short-form video: it's discoverable on a search-driven platform, indexable for years, and consumed by audiences who self-selected into a 10-minute commitment. The threshold is achievable: one video per week. The agents producing 3+ long-form videos a month are operating on a fundamentally different leverage curve.

CONTENT → DEALS · LONG-FORM ADOPTION GAP

Long-form YouTube separates "a lot" from "not yet" by 3x.

That **40-point gap is 3× larger** than the gap for any other format.

"Not yet" agents

NO DEALS FROM CONTENT YET

24%

use **long-form video**.

vs

"A lot" agents

CONTENT DRIVING DEALS CONSISTENTLY

64%

use **long-form video**.

The pattern is consistent: long-form is not used by most agents, but it is used by the agents getting the most out of content. Whether long-form causes the elite-tier outcomes or whether the agents disciplined enough to ship long-form are also disciplined enough to convert it is a question this dataset can't fully resolve: but the correlation is among the strongest in the report. The practical implication is clear: after establishing short-form cadence, long-form is the next highest-leverage format to prioritize.

YOUTUBE · INTENT VS. EXECUTION

The YouTube aspiration gap.

More than half of agents want to invest more in YouTube next year.
Nearly half of those agents haven't published a single long-form video.

ASPIRATION

51%

plan to invest more in YouTube.

The biggest channel agents are betting on.

REALITY

44.5%

publish zero long-form videos.

Wanting to invest, while shipping nothing.

THE GAP

1 in 2

hopefuls haven't even started yet.

Budget is moving toward a channel 50% don't use.

The single largest disconnect between intent and execution in the dataset. The channel agents are most enthusiastic about for 2026 is the same channel where roughly half of the enthusiasts haven’t shipped anything. Intent is cheap. Execution is the moat. The agents who will win YouTube in 2026 are the ones who started shipping in 2025: or who start this week.

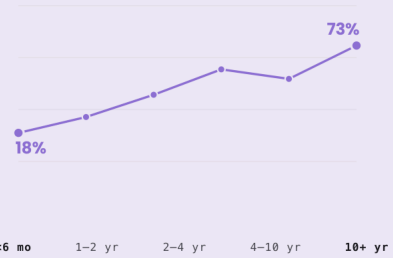
YEARS CREATING CONTENT × OUTCOMES

With content practice makes perfect. Under 6 months vs. 10+ years creating.

The longer agents have been creating, the more content drives their business.

REPORTS CONTENT DROVE DEALS

4.1× growth

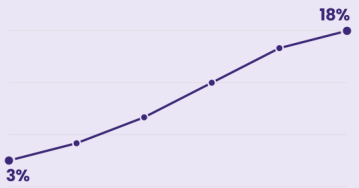


<6 mo 1–2 yr 2–4 yr 4–10 yr 10+ yr

"A few" or "a lot" of deals.

REPORTS "A LOT" OF DEALS

6.1× growth



<6 mo 1–2 yr 2–4 yr 4–10 yr 10+ yr

The elite tier aka a lot of deals.

26%+ LISTINGS FROM CONTENT

2.8× growth

<6 mo 1–2 yr 2–4 yr 4–10 yr 10+ yr

Content tenure drives the listing pipeline.

Three outcomes. Three multiples. Deal attribution climbs from 18% at 6 months to 73% at 10+ years: a 4.1× lift. Elite-tier attribution (“a lot”) climbs from 3% to 18%: a 6.1× lift. Content-driven listing share (26%+) climbs from 9% to 25%: a 2.8× lift. The first six months produce almost nothing. The first two years produce a little. The leverage is in the years, not in the videos.

TENURE × CADENCE · % WHO SAY CONTENT DROVE "A LOT" OF DEALS

Stack tenure with cadence and content-driven deals jump 9×.

Veteran creators (4+ years) who also publish 5+ short-form videos a month report content drove "a lot" of their deals.
A **9× rate** of agents with neither trait (**the largest effect in the data**).

NEITHER TRAIT

Newer · low cadence

< 4 yrs tenure

< 5 / mo short-form

BOTH TRAITS

Vets + high cadence

4+ yrs tenure

5+ / mo short-form

Run every two-variable cross-tab in the dataset and one combination outperforms the rest. Agents who have been creating content for four or more years *and* who publish five or more short-form videos per month report “a lot of deals” from content at 34.2%: compared to 3.8% for agents with neither trait. A 9× separation and the single largest two-variable effect in the entire report. Tenure produces library effects: the videos from 2022 are still being discovered by sellers in 2026. Cadence produces top-of-mind effects: the videos from this week are reaching the sphere who already knows you. Together they ensure an agent is being discovered by new audiences and reinforced with existing ones simultaneously.

KEY TAKEAWAYS · SECTION TWO · CONTENT

Seven things to remember from the content section.

01

Content is a compounding asset, not a marketing tactic.

Agents past the 10-year mark see deal attribution at 4.1×, elite-tier attribution at 6.1×, and content-driven listing volume at 2.8× the rate of first-year creators. The leverage is in the years.

02

The audience exists. Most agents don’t realize it.

85% of agents say their sphere engages with their content. Only 19.3% would feel a serious hit if social media disappeared. The gap between those two numbers is the entire opportunity.

03

Most agents aren’t measuring. The ones who are find it works.

60.7% of agents either don’t track listing sources or estimate less than 10% come from content. The first move: start tagging deal sources in your CRM today.

04

Cadence is a dose-response. Five per month is the threshold.

Zero per month: 24% deal attribution. Five to fifteen per month: 66%. The big unlock is moving from sporadic to consistent: not from 10 to 30.

05

Long-form separates winners from waiters.

64% of “a lot of deals” agents use long-form vs. 24% of “not yet” agents. That 40-point gap is 3× larger than for any other format. Long-form also unlocks YouTube: 3/month produces a 2.7× lift in lead generation.

06

The Vet + Cadence combo is the single strongest predictor in the report.

4+ years of creation + 5+ short-form posts/month = 9× the rate of “content drove a lot of deals” vs. neither trait. No other two-variable combination in the dataset produces a lift that large.

07

The YouTube aspiration gap is a 2026 risk.

51% plan to invest more in YouTube. 44.5% of those agents haven’t shipped a single long-form video this month. Intent is cheap. Execution is the moat.

You’re great at real estate. Knwn Local makes it known.

The data in this section shows that agents who build hyper-local brands over years outperform the field by orders of magnitude. The 9x Tenure and Cadence finding is not a coincidence. It is what happens when you build a local brand that owns a market so completely that clients seek you out, agents want to join you, and competitors wonder how you are everywhere at once.

That is what Knwn Local is built to do. Knwn Local builds and manages hyper-local real estate brands at scale: YouTube channels that attract buyers and sellers in your specific market, email databases that turn into listing appointments, and short-form strategies that build presence on the platforms the data actually supports.

758 million impressions. Over $11M in GCI generated annually for clients. 50+ active YouTube channels across 28 markets. The agents behind the biggest hyper-local brands in real estate built them with **Knwn Local**.

You put in the years. Knwn Local builds the library that makes those years compound.

Knwn Local · Sponsor of Section Two: Content · knwnlocal.com

SECTION THREE · LISTINGS & LEADS

The pipeline behind every deal.

Every conversation about marketing in real estate eventually has to answer one question. Where do the listings actually come from?

Not the impressions. Not the engagement. Not the followers. The listing appointments that turn into signed contracts and closed transactions.

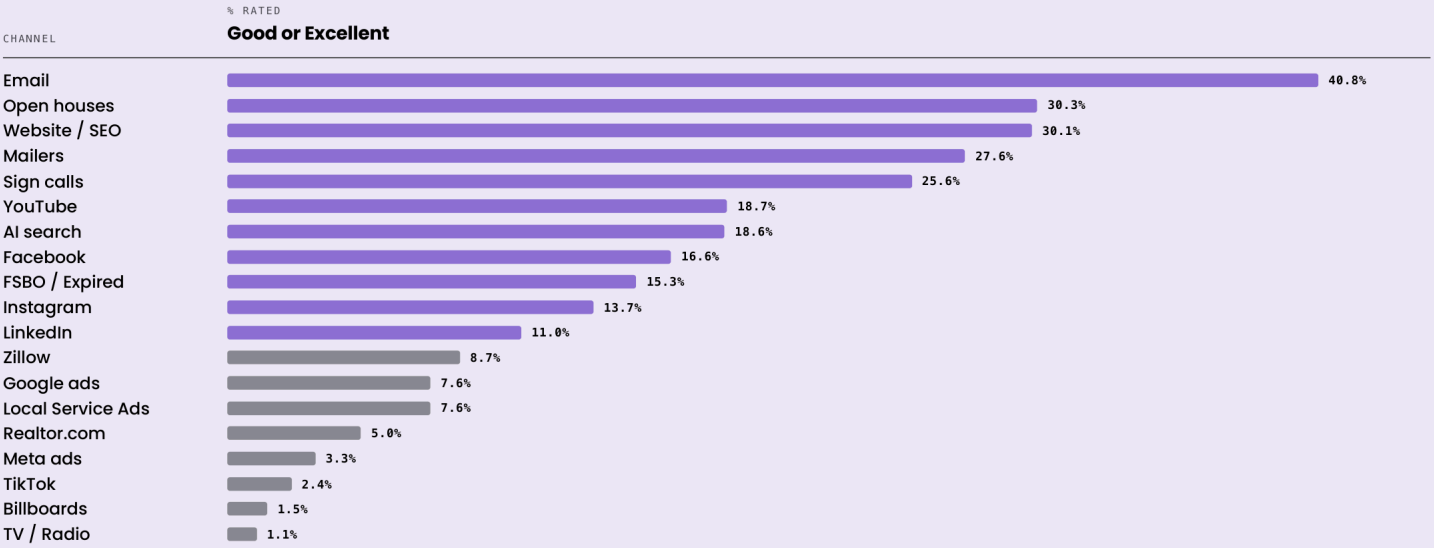
Two channels dominate. Sphere of influence and email. Together they produce the majority of listing appointments and the overwhelming majority of high-quality leads in real estate. Everything else: the portals, the ad networks, the paid lead services, the social platforms: sits well below them on quality and volume. And most of those channels deliver zero leads to most agents in most months.

The findings in this chapter break into four movements: the landscape of what actually works, the failure pattern of what doesn't, the narrative reversals that collapse "X is broken" stories under segmentation, and the synthesis showing where agents plan to put their 2026 budgets.

LEAD QUALITY · % RATED GOOD OR EXCELLENT

Best channels for lead quality.

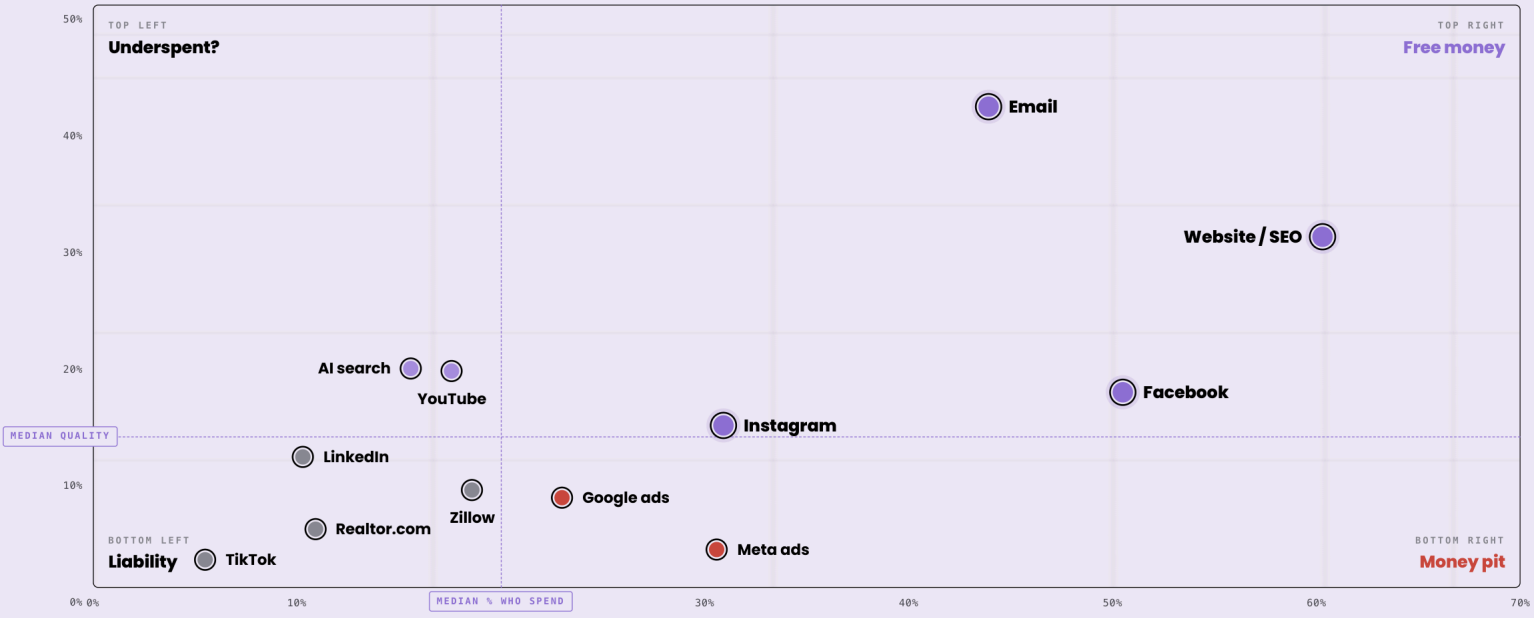
Sphere of influence is the exception **81% rate it good or excellent**.
Among the other 19 channels, **only Email, Open houses, and Website / SEO clear 30%**.



Only one channel in the entire study clears 80% of agents rating its leads good or excellent: sphere of influence, at 81%. The benchmark by which every other channel should be judged. Email leads the paid/external group at 40.8%, followed by open houses (30.3%) and website/SEO (30.1%). Once you exit those five channels, no source is rated good or excellent by even one in five agents. The quality gap between sphere and everything else is the most fundamental finding in this section.

SPEND × LEAD QUALITY · ALL CHANNELS

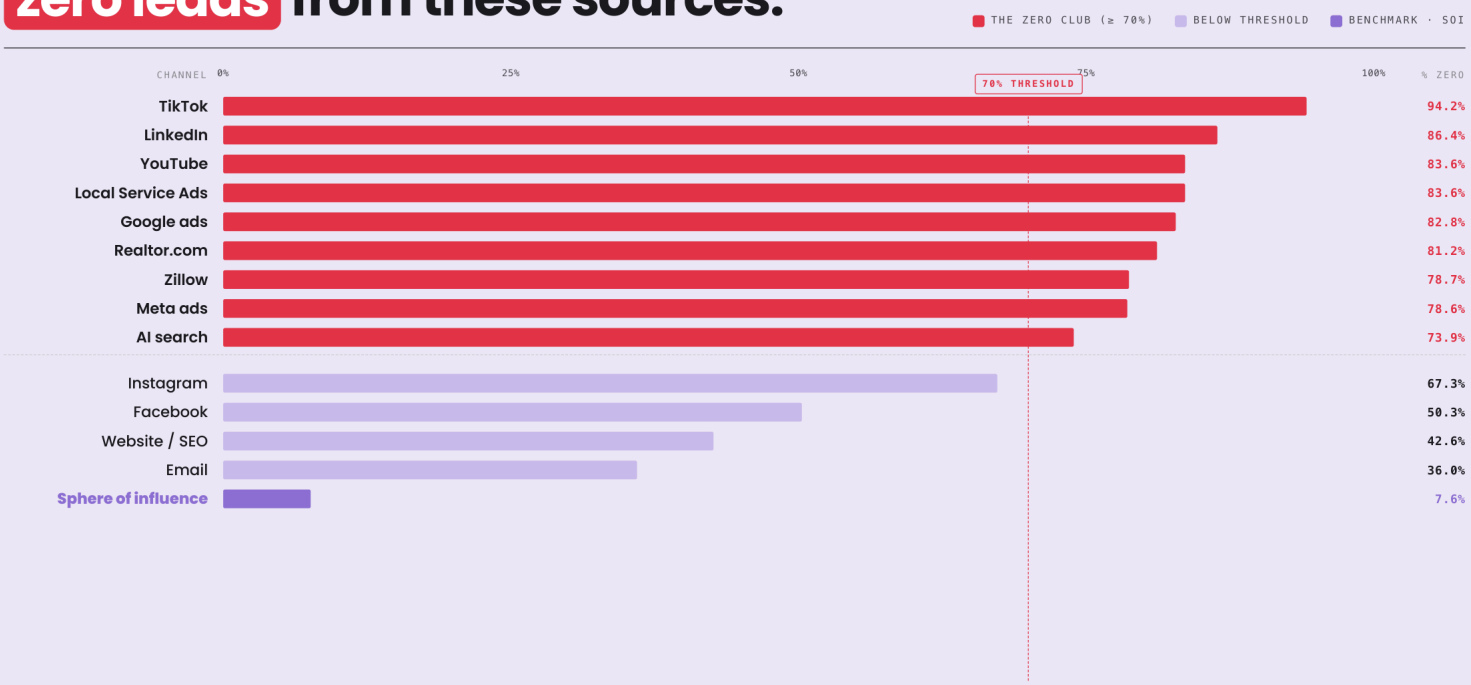
Email & SEO have best ROI. Portals & Paid Ads = low quality.



Top-right quadrant: high spend adoption, high quality. Two channels: email and website/SEO. Top-left: high quality but underspent: AI search and YouTube. The field hasn't caught up to what the data says. Bottom-right: high spend, low quality: the portals. Bottom-left: low adoption, low quality: TikTok, Meta ads, Google ads for listings. The map is clear. Two channels are unambiguously worth paying for. Two are worth experimenting with early. The rest are producing the 82% average zero-lead rate.

% OF AGENTS GENERATING ZERO LEADS PER MONTH

82% of agents generate zero leads from these sources.



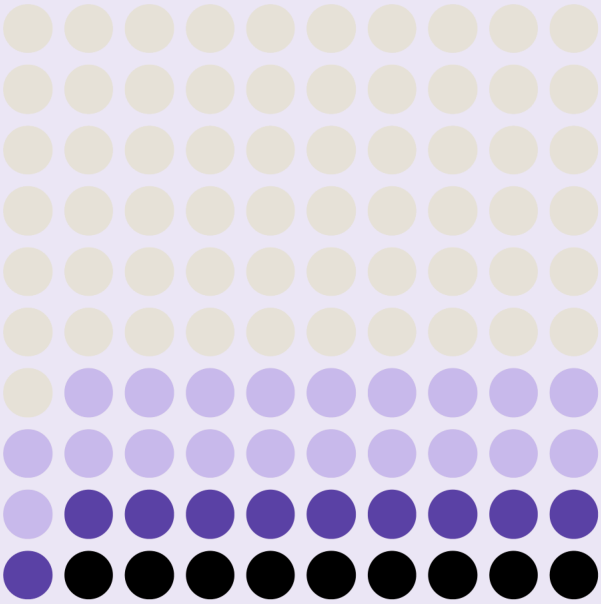
The average zero-lead rate across paid digital and portal channels is 82%. For every ten agents writing checks to these platforms, roughly eight got nothing back. This is the finding that should reshape the mental model of most working agents. The question is not whether a channel theoretically works. It is whether it works for you, at your investment level, in your market. Most agents are spending budget on channels that are statistically unlikely to generate a single lead this month.

LISTINGS FROM PEOPLE WHO CONSUMED CONTENT FIRST

39% of agents get listings from content.

19.1% see 26%+ listings from content.
4.8% say content drives more than 75% of their listings.

Don't track / under 10% NO ATTRIBUTION IN PLACE	60.7%
10–25% from content A MEASURABLE SLICE	20.2%
26–50% from content A MEANINGFUL SHARE	9.7%
50%+ from content CONTENT IS THE PRIMARY ENGINE	9.4%

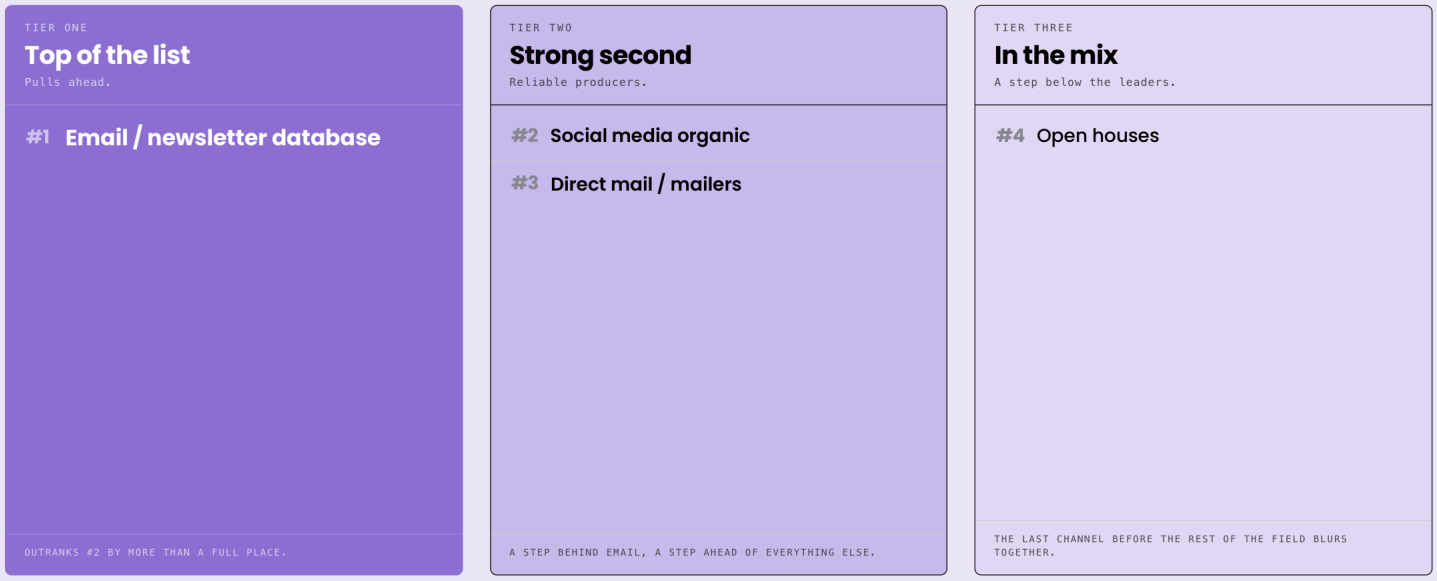


The reason most agents can't tell whether their content is producing listings is not because their content isn't working: it's because they have no attribution system to find out. A seller calls and mentions they've been "following you for a while." The agent doesn't write that down. Among the 39% who do track it, content is producing a meaningful share of the listing book. For everyone else, the first actionable move is simple: start tagging deal sources in a CRM.

TOP LISTING APPOINTMENT SOURCES · RANKED BY AGENTS

The 4 best tactics to get listings.

When agents rank where their listings actually come from emailing their database is the clear winner.

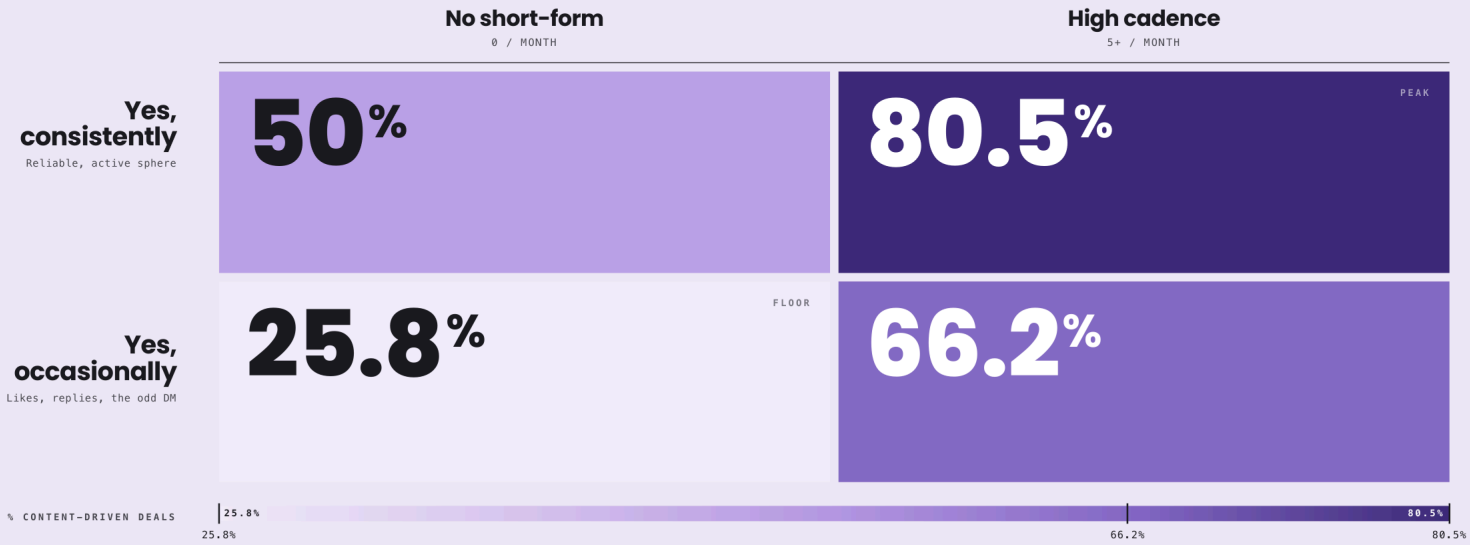


Email and newsletter databases sit alone at the top: outranking the next closest channel by more than a full place. Organic social media and direct mail hold the second tier. Open houses sit alone in the third. Below that, the data flattens. Paid channels, portals, and networking sit close enough together that the choice between them is more a function of preference than performance. The ranking is not close at the top: email is the dominant listing channel by a meaningful margin.

SOI ENGAGEMENT × SHORT-FORM CADENCE · % WHO SAY CONTENT DROVE DEALS

Short-form videos exponentially increase SOI engagement.

Going from **0** to **5+ short-form posts a month** nearly triples the rate of content-driven deals.

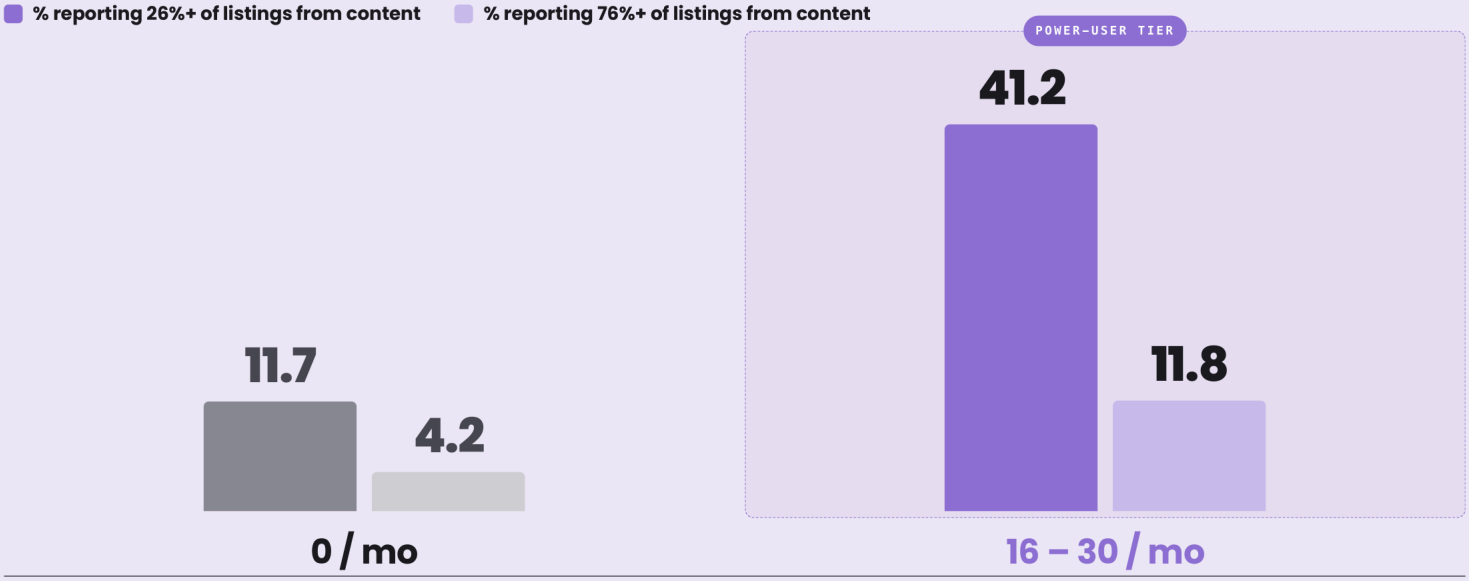


Sphere of influence is the highest-quality channel in real estate. Content cadence is the amplifier that makes the sphere produce listings at the rate it's capable of. Among agents with a consistently engaging sphere, moving from zero to 5+ short-form posts per month takes content-driven deals from 50% to 80.5%. Among agents with an occasionally engaging sphere, the same shift takes it from 25.8% to 66.2%. The sphere already exists for most agents. The cadence is the variable they can control.

SHORT-FORM VIDEO FREQUENCY × CONTENT-DRIVEN LISTING VOLUME

Listing volume has a 3.5× jump on short-form video frequency.

It's not just deal attribution **reported listing volume from content** climbs at every video frequency tier.



The short-form cadence pattern established in Section Two doesn't stop at deal attribution: it extends directly into listing volume. Agents in the 16–30 posts-per-month tier report the majority of their listings coming from content at 41.2%, vs. 11.7% for zero-posters. Among the elite tier (76%+ listings from content), the high-cadence group hits 11.8% vs. 4.2%. The mechanism is consistent: cadence keeps the agent visible to the sphere as a listing expert, surfacing seller conversations that would otherwise go to whoever the seller saw most recently.

LONG-FORM VIDEO CADENCE × YOUTUBE AS A LISTING SOURCE

Crossing 3 long-form posts / month is a 10× lift for YouTube as a listing source.

Each row below is the share of agents ranking YouTube in their top-3 listing appointment sources. Below 3 long-form videos / month, almost no one. Above, it jumps to nearly 1 in 3.

0 / month

NO LONG-FORM

2.8%

rank YouTube in their top-3 listing sources.

1 – 2 / month

STARTER CADENCE

6.6%

rank YouTube top-3 still bottom of the list.

THE 3 / MONTH STEP

3 – 4 / month

STEP-FUNCTION TIER

28%

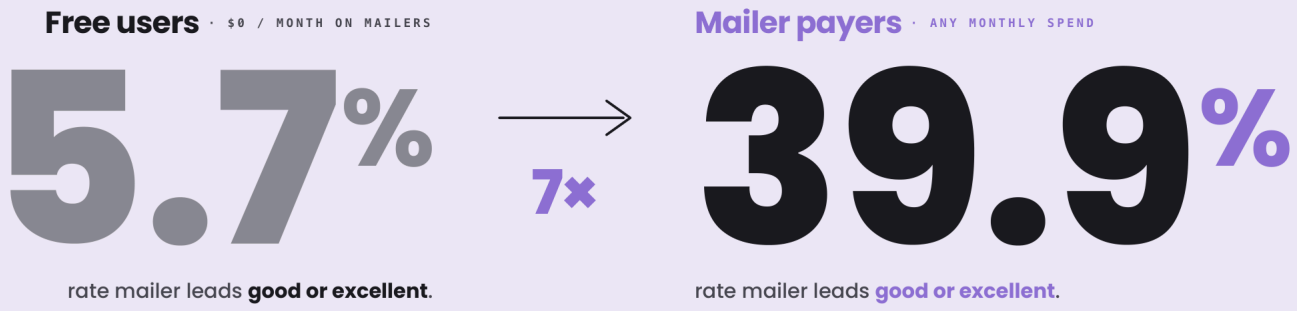
rank YouTube top-3 for getting listings 10× the rate of zero-posters.

The 3-per-month long-form threshold is the inflection point for YouTube as a real listing channel. Above it, YouTube ranks as a meaningful source. Below it, YouTube produces essentially nothing as a listing source. Combined with the YouTube aspiration gap from Section Two: any agent planning to invest more in YouTube in 2026 either needs to be operating above 3 long-form videos per month by mid-year, or the channel will produce nothing for them. The intent means nothing without the cadence.

DIRECT MAIL · LEAD QUALITY BY SPEND TIER

Direct mail doesn't fail. It just rewards the people paying for it.

The "direct mail doesn't work" narrative collapses when you segment by spend. Mailer payers rate quality good or excellent at 7× the rate of free users.

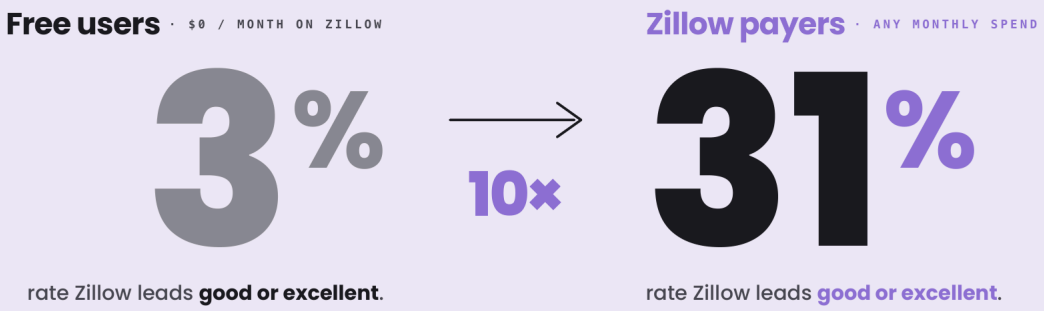


Among agents not spending on direct mail: low quality ratings. Among agents making consistent investments: 7× higher quality scores. The “direct mail is dead” narrative in real estate is almost entirely told by agents who don’t pay for it and have never run a real campaign. Before adopting any “X is dead” narrative in 2026, check whether the person telling it is a paying customer. The data says direct mail is not dead: it is underfunded.

ZILLOW · LEAD QUALITY BY SPEND TIER

The "Zillow leads suck" narrative is mostly from agents who don't pay.

Agents who put real budget into Zillow rate their leads **good or excellent at 10× the rate** of free users.

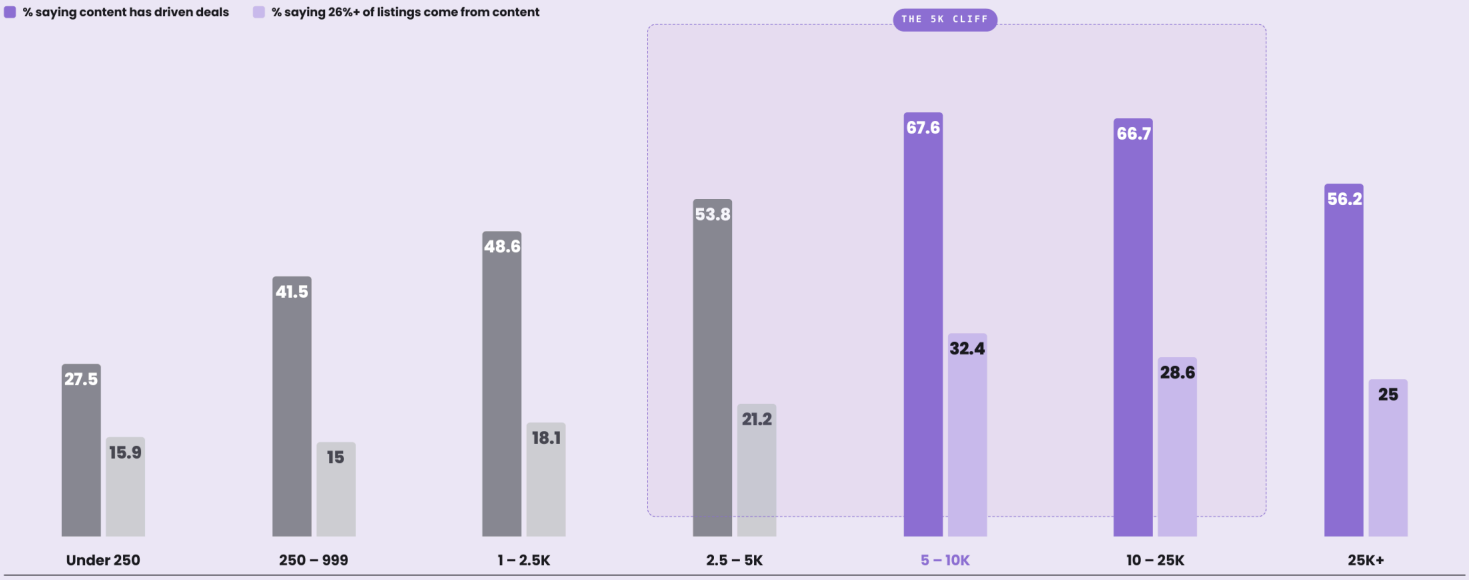


The same reversal pattern that appears in direct mail appears in Zillow, at a larger multiple. Free users: who make up the majority of agents “using” Zillow: rate leads poorly. Agents who actually commit meaningful budget to the platform rate leads good or excellent at 10× the rate. The “Zillow is broken” story is a non-customer projection. The channel works: for agents who pay for it at a level the platform requires to produce quality inventory.

EMAIL LIST SIZE × CONTENT ATTRIBUTION

Email list size hits a clear inflection point at 5,000 contacts.

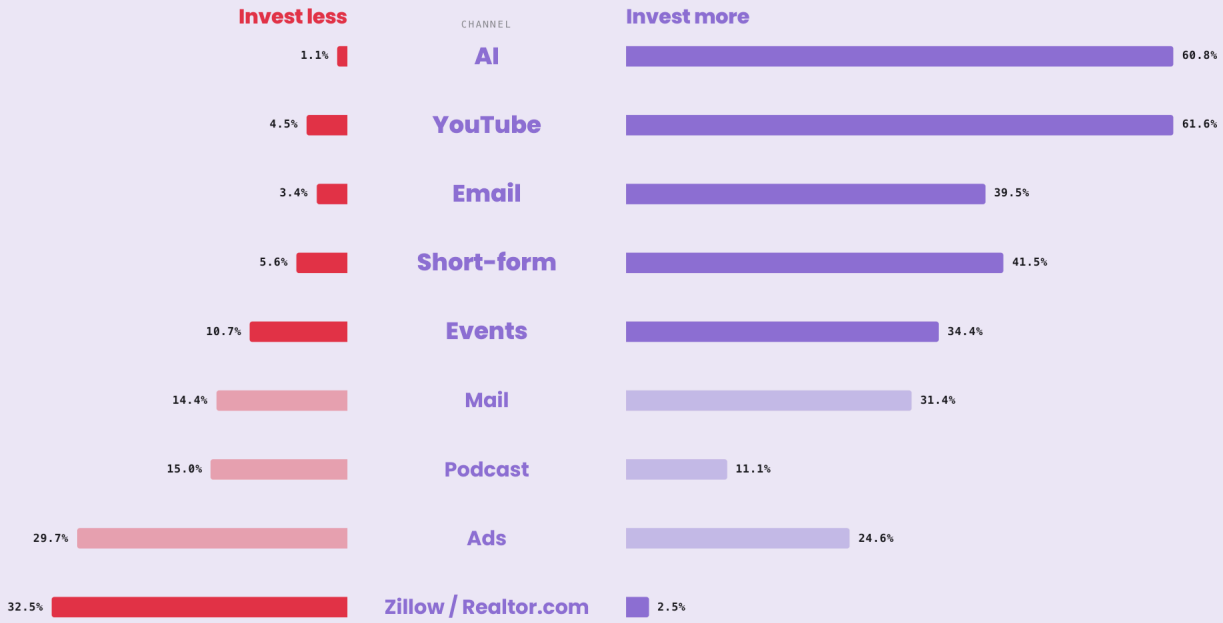
Both "deals from content" and "26%+ listings from content" climb gently across the early tiers and then jump the moment a list crosses 5k.



Below 5,000 contacts, both metrics climb gradually. Crossing 5,000 contacts, both jump sharply. The lift across the 5K threshold is the largest single jump in the curve. 5,000 engaged email contacts is the explicit growth milestone for any agent serious about turning the sphere into a scalable, predictable business. It is achievable for most working agents within a few years of consistent list-building effort: and the data says the jump in outcomes when you cross it is significant.

INVESTMENT INTENT BY CHANNEL

Where agents say they'll invest more and spend less in the next 12 months.



The directional move is unmistakable. The 2026 marketing budget is moving from rented audiences toward owned ones. AI tools and YouTube get the largest “invest more” votes at 60.8% and 61.6% respectively. Short-form video (41.5%) and email (39.5%) follow. Zillow and Realtor.com are the only channels where more agents plan to cut than grow: a 13:1 ratio against. The agents best positioned to benefit from this shift started building owned assets years ago. For the rest, the time to start is now.

KEY TAKEAWAYS · SECTION THREE · LISTINGS & LEADS

Seven things to remember from the listings & leads section.

01

Email is the dominant listing source in real estate.

Email and newsletter databases sit alone at the top of the listing-source ranking, outranking the next channel by more than a full place. The 2026 listings playbook starts with email infrastructure: or it doesn't start.

02

Sphere of influence is the only channel that consistently performs on quality.

81% of agents rate sphere leads good or excellent. No other channel clears 41%. Email and content work largely because they are mechanisms for staying in front of the sphere.

03

Most paid channels deliver zero leads to most agents.

13 of the 21 channels measured deliver zero leads to 70%+ of agents using them. The average zero-lead rate across paid digital and portal channels is 82%.

04

The "X is broken" narratives are non-customer projections.

Direct mail produces good-or-excellent leads at 7× the rate among paying customers. Zillow at 10×. Before adopting any "X is dead" narrative, ask whether the person telling it is a customer.

05

Sphere and content cadence multiply each other.

Consistently engaging sphere + 5+ short-form posts/month: content-driven deals jump to 80.5%. Sphere is the quality channel. Cadence is the amplifier.

06

Email list size hits a clear inflection point at 5,000 contacts.

Crossing 5K: content-driven deals jump from 53.8% to 67.6%, content-driven listings from 21.2% to 32.4%. 5,000 engaged contacts is the explicit north-star growth milestone.

07

The 2026 budget is moving from rented audiences to owned ones.

AI, YouTube, short-form, and email get the largest "invest more" votes. Zillow and Realtor.com are the only channels where more agents plan to cut than grow: 13:1 against.

One plan. Every Monday. Listings by Friday.

The data in this section makes one finding inescapable: most marketing channels in real estate deliver zero leads to most agents. The agents who generate listings consistently are not running a wider channel portfolio. They are running a narrower one, executed on a weekly plan they actually follow.

That is what Listing Leads is built for. Founded by Tom Ferry and Jimmy Mackin, Listing Leads sends every member one plan each Monday morning. The plan takes about thirty minutes to execute and covers both halves of your business: find new leads (expireds, FSBOs, your farm) and convert the ones already in your database (past clients, sphere, old leads).

Over 4,000 agents run the plan. The members who follow it are converting expired mailers into $3M listings, turning Zestimate letters into signed contracts, and booking listing appointments from sellers who kept the package on their desk meaning to call.

The channels the data says work are sphere, email, and content. **Listing Leads** is the weekly system that works all three.

Listing Leads · Sponsor of Section Three: Listings & Leads · listingleads.com

SECTION FOUR · BROKERAGES

Eight brands, head-to-head.

This section is about what working agents at the eight largest brokerage cohorts in the dataset are actually doing with their marketing: not what their brokerage says they should be doing, and not what the recruitment deck claims they get for their split.

The findings sort the field in ways that should be interesting to anyone considering a move and useful to anyone trying to understand where the industry is going. Some brokerages are quietly leading on AI adoption despite a traditional brand. Some are betting harder on paid social than the field expects. One brokerage's agents turn content into deals at more than twice the rate of another's.

Eight spotlights follow. After the spotlights, four head-to-heads close the section.

BROKERAGE SPOTLIGHT

Berkshire Hathaway agents are quietly tech-savvy.

28.0% — AI search spend

put **real budget** into AI search
#1 among every major brokerage.

88.5% — Email cadence

send email monthly or more
#1 among every major brokerage.

88.0% — Reels adoption

of video users publish Reels
a near-universal habit at the brand.

53.8% — Email quality

rate email leads good or excellent
well above the cross-brokerage average.

The Berkshire Hathaway brand reads as the traditional house. The data tells a different story. 28% of BH agents put real budget into AI search: the highest rate of any major brokerage. 88.5% send email monthly or more, also the highest rate in the dataset. The pattern is consistent: BH agents are not the loudest voice in any category. They are the most quietly disciplined.

BROKERAGE SPOTLIGHT

Coldwell Banker agents execute often.

COLDWELL BANKER

47.8% — Email frequency

send email weekly or more

the highest cadence among major brokerages.

56.5% — Long-form video

produce any long-form video in a typical month

top of any major brokerage.

24.0% — Google ads

generate at least one lead from Google ads each month

leading every major brokerage.

2.4× — LinkedIn quality

higher rate of LinkedIn leads rated good or excellent

ahead of every other brokerage.

If Berkshire Hathaway is quiet discipline, Coldwell Banker is loud cadence. 47.8% send email weekly or more: the highest cadence among the eight brand cohorts. 56.5% produce long-form video in a typical month, the top rate at any major brokerage. The Coldwell Banker cohort is a useful corrective to the narrative that legacy franchise brokerages have fallen behind on marketing innovation.

BROKERAGE SPOTLIGHT

Keller Williams agents love AI, email and YouTube.

91.4% — AI research

of AI users tap it for **research**
#1 among every major brokerage.

75.0% — Email leads

get at least one lead from email monthly
#1 among every major brokerage.

32.1% — YouTube quality

rate YouTube leads **good or excellent**
#1 among every major brokerage.

64.9% — Email spend

put real budget into email marketing #1 among every major brokerage.

Keller Williams produces the most balanced marketing profile in the dataset, aligned with what the overall data says actually works: AI for writing and research, email as the foundation, YouTube as a quality lead source for agents who have committed to it. Where KW underperforms: turning content into deals at the rate Compass agents do: is the largest individual brokerage finding in the dataset, covered in the head-to-heads.

BROKERAGE SPOTLIGHT

RE/MAX agents lean into long-form video and paid ads.

28.2% — YouTube

get at least one lead from YouTube/ month
#1 among every major brokerage.

26.2% — Long-form video

produce 3+ long-form videos per month
#1 among every major brokerage.

28.9% — Paid ads

rank Google or Meta ads in their top-3 listing appointment sources
#1 among every major brokerage.

59.0% — Facebook

generate at least one lead from Facebook each month
#1 among every major brokerage.

RE/MAX has the most distinctive channel mix of any cohort: over-indexed on two groups most brokerages have underinvested in: long-form video and paid social. 26.2% produce 3+ long-form videos a month (the YouTube inflection threshold from Section Two). 28.2% generate YouTube leads monthly, the highest of any brokerage. RE/MAX agents are the cohort most willing to invest in higher-friction, higher-leverage formats.

BROKERAGE SPOTLIGHT

Compass agents turn content into business.

COMPASS

21.4% — Content → listings

say **51%+ of their listings** come from people who consumed their content first

#1 among every major brokerage.

18.5% — Content → deals

say content has led to a lot of deals

#1 among every major brokerage.

28.0% — LinkedIn leads

generate at least one lead from LinkedIn each month

#1 among every major brokerage.

52.6% — Web / SEO quality

rate Website / SEO leads good or excellent

#1 among every major brokerage.

If one brokerage cohort represents the playbook this entire report is arguing for, it is Compass. 21.4% of Compass agents say the majority of their listings come from content consumers: highest of any major brokerage, nearly double the field average. They are not just creating content. They are systematically converting content into listings and deals at rates the rest of the field is not coming close to.

BROKERAGE SPOTLIGHT

Independent brokerage agents are all in on AI.

Independent
BROKERAGES

40.3%
AI hours saved
say AI saves them **6+ hours every week**
#1 among every major brokerage group.

18.1%
Deep AI savings
say AI saves them **11+ hours every week**
#1 among every major brokerage group.

81.8%
Email source
rank **email / newsletters** in their top-3 **listing appointment sources**
#1 among every major brokerage group.

34.3%
AI for video
of AI users tap it for **videos**
#1 among every major brokerage group.

The independent brokerage cohort is the dark horse of this report's brokerage analysis. Agents at indie brokerages don't have a corporate marketing stack handed to them. They build their own. 40.3% save 6+ hours per week from AI: the highest of any brokerage group. 18.1% save 11+ hours, roughly double the cross-field average. The lack of a corporate template appears to have forced these agents to build something better.

BROKERAGE SPOTLIGHT

eXp agents lean into AI and paid social.

84.2% — AI daily use

use AI **every day**
#1 among every major brokerage.

78.8% — AI intent

plan to invest more in AI in 2026
well above the cross-brokerage average.

32.4% — Meta ads leads

generate at least one lead from Meta ads each month
#1 among every major brokerage.

25.7% — Realtor.com leads

generate at least one lead from Realtor.com each month
#1 among every major brokerage.

eXp produces the most aggressive paid-channel profile of any brokerage, paired with the highest AI usage rate in the entire report. 84.2% of eXp agents use AI every day. The eXp signature is scale plus automation: running heavily on paid social acquisition, portal-driven lead flow, and an AI-augmented top-of-funnel. This is the opposite playbook from Compass, and both are valid.

BROKERAGE SPOTLIGHT

REAL agents go big on Instagram (especially Reels).

real

100%

Reels adoption

of video users publish **Reels**
#1 among every major brokerage.

50.0%

Short-form intent

plan to invest more in short-form video #1 among every major brokerage.

55.0%

Instagram spend

put real budget into Instagram
#1 among every major brokerage.

33.3%

AI search leads

get at least one lead from AI search/month well above the cross-brokerage average.

REAL produces the most distinctive social media profile of any major brokerage. 100% of REAL video users publish Reels. 50% plan to invest more in short-form video in 2026. The REAL signature is Instagram-native, short-form-heavy, AI-curious. It is the brokerage in the dataset most clearly oriented toward the platforms and formats that have come of age in the last five years.

HEAD TO HEAD · CONTENT CREATION → DEALS

Compass turns content into deals at 2.4× the rate of Keller Williams.

COMPASS

66.7%

say content creation has driven **a few or a lot of deals**.

vs

KELLERWILLIAMS

27.3%

say the same.

The widest spread between any two major brokerages on a single deal-attribution question. Two factors likely explain it: clientele (Compass agents work higher-price markets where content does more conversion work) and infrastructure (Compass has invested heavily in attribution tracking and content distribution). KW isn't failing at content: Compass is just operating a fundamentally different model.

HEAD TO HEAD · PAID SEARCH + PRODUCTION

Keller Williams beats Compass at the top and bottom-of-funnel

KW agents out-execute Compass on the two channels that move volume buying intent at the top of funnel, and closing it at the bottom.

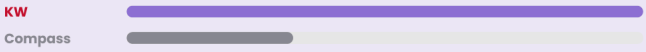
kw KELLERWILLIAMS

VS COMPASS

TOP OF FUNNEL · GOOGLE ADS

3.1×

more likely than Compass to generate leads from Google ads.



BOTTOM OF FUNNEL · PRODUCTION

2.1×

more likely than Compass to close 31+ transactions in a year.

The two head-to-heads together show each brokerage outperforming the other on dimensions that match its model. Compass wins the content-driven listing model. Keller Williams wins the higher-velocity paid-acquisition + production model. These are not the same business. They are two valid operating models, and the productivity comparison between them depends entirely on which game is being scored.

HEAD TO HEAD · AI USAGE VS. AI LEVERAGE

eXp uses AI the most but REAL gets the most out of it.

eXp

DAILY AI USAGE

84.2%

use AI every day (highest in the survey).

AI SAVES 6+ HOURS / WEEK

16.2%

report meaningful weekly time savings.

VS

REAL

DAILY AI USAGE

79.2%

use AI every day (close behind eXp).

AI SAVES 6+ HOURS / WEEK

37.5%

report meaningful weekly time savings.

2.3× REAL agents are 2.3× more likely than eXp agents to say AI saves them 6+ hours a week despite using AI slightly less often.

eXp's daily AI usage is the highest in the field. But REAL's rate of meaningful leverage (6+ hours saved per week) exceeds eXp's. eXp agents use AI more. REAL agents extract more from each AI session. Whether you read that as eXp being earlier in the leverage curve or REAL having a more disciplined AI practice depends on your priors: but the gap is real and the data is unambiguous.

HEAD TO HEAD · PAID LEADS · PRODUCTION

eXp outpaces REAL on both paid acquisition and deals closed.

eXp

META ADS LEAD GENERATION

32.4%

generate 1+ leads from Meta ads each month.

31+ TRANSACTIONS IN 2025

28.4%

closed 31 or more transactions last year.

VS

REAL

META ADS LEAD GENERATION

5.0%

generate 1+ leads from Meta ads each month.

31+ TRANSACTIONS IN 2025

12.9%

closed 31 or more transactions last year.

6.5× eXp agents are 6.5× more likely to generate leads from Meta ads and 2.2× more likely to close 31+ transactions a year than REAL agents.

The brokerage that reports the highest daily AI usage (eXp) is not the brokerage extracting the most hours per week from AI (indie brokerages, followed by REAL). This is the clearest illustration in the report that adoption and leverage are different things. Daily use is table stakes. Workflow discipline is the moat. And the agents at indie brokerages, who built their own stack because no one handed them one, are the ones who built it best.

KEY TAKEAWAYS · SECTION FOUR · BROKERAGES

Six things to remember from the brokerages section.

01

The major brokerages are not running the same playbook.

Compass is a content-attribution business. eXp is a paid-acquisition-at-scale business. REAL is Instagram-native and AI-leverage. Berkshire Hathaway is quiet discipline. These are structurally different bets on what produces business in 2026.

02

Legacy brand assumptions are out of date.

Berkshire Hathaway leads on AI search adoption. Coldwell Banker leads on long-form video production. Keller Williams out-executes Compass on paid search. The traditional reading of legacy franchises as falling behind does not survive segmentation.

03

Compass and Keller Williams win different games.

Compass leads on content-to-listings and content-to-deals. Keller Williams leads on paid search lead generation and 31+ transaction volume. Each outperforms on the metric that matches its model.

04

Independent brokerages punch above their weight on AI.

The indie cohort leads every other group on AI hours saved per week, deep AI savings, AI-for-video adoption, and email as a top-3 listing source. Agents without a corporate marketing stack built something better.

05

eXp and REAL are not the same business.

REAL leads on AI leverage, Reels adoption, and short-form intent. eXp leads on AI daily usage, paid-social acquisition, and 31+ transaction rates. The industry’s tendency to lump them together obscures the most consequential strategic differences between them.

06

Brokerage choice in 2026 is a choice about operating model.

Choosing a brokerage is choosing which operating model runs beneath you for the next ten years. The data makes content-led, paid-acquisition-led, sphere-and-cadence-led, and AI-leverage-led models visible in a way brokerage marketing materials never will.

SYNTHESIS · WHAT TO DO ABOUT IT IN 2026

Three strategic shifts the data supports.

Shift One

Stop renting audiences. Start owning them.

The single clearest pattern across this report: owned-asset channels outperform rented-audience channels on quality, cost, and long-term durability. Email is the dominant listing source in real estate. Sphere of influence is the highest-quality channel by a wide margin. **In practice:** audit your channel mix. Identify what portion of annual marketing spend goes to channels you don't own. Reallocate a meaningful portion toward building the email list past 5,000 contacts, building the content library, and building the AI-augmented workflow that feeds both.

Shift Two

Build the compounding asset before you need it.

The Vet + Cadence finding is the most strategically loaded number in the report. 4+ years of consistent creation + 5+ short-form posts per month = 9× the "a lot of deals" rate. **In practice:** commit to five short-form posts a month at minimum. Add long-form at 1–2 per month, with a path to three. Build the email list with the explicit goal of crossing 5,000 engaged contacts within 24 months. Track which deals come from people who consumed your content first.

Shift Three

Choose your operating model deliberately.

The brokerages in Section Four are no longer running the same playbook. Compass is a content-attribution business. Keller Williams is a paid-search-and-production business. eXp is a paid-acquisition-at-scale business. REAL is a social-native, AI-leverage business. These are operating-model differences, not brand differences. **In practice:** ask which model your brokerage is actually running. Decide whether that model fits the business you want in five years. If it does, lean in. If it doesn't, this report puts the question in front of you.

Three shifts. None tactical. All within the agent's control.

ABOUT THIS REPORT

Publisher, sponsors, contact.

The Publisher

Knwn Local

Knwn Local builds hyper-local real estate brands that own markets: YouTube channels attracting buyers and sellers, email databases that convert to listing appointments, and short-form content strategies built on what the data supports.

Co-founders: Andrew Bayon, Chris Smith, and Clayton Mclemore

knwnlocal.com

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Co-founders: Jimmy Mackin and Tom Ferry

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