

savills

BRANDED RESIDENCES

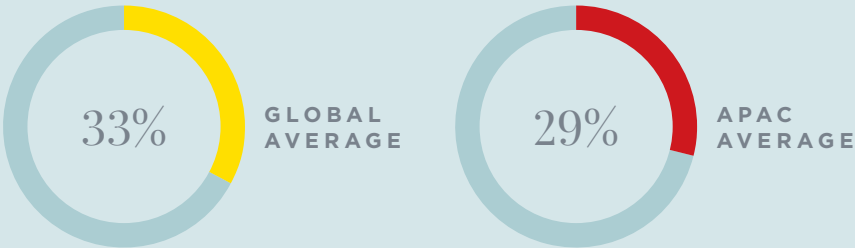
ASIA PACIFIC 2026



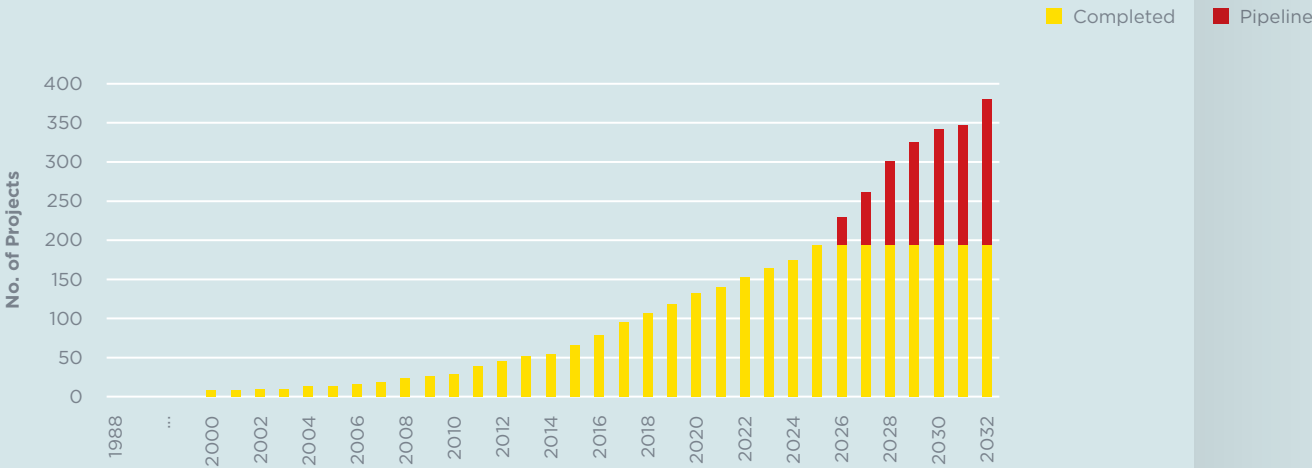
1 HOTEL & HOMES MELBOURNE, AUSTRALIA

APAC BRANDED RESIDENCES AT A GLANCE

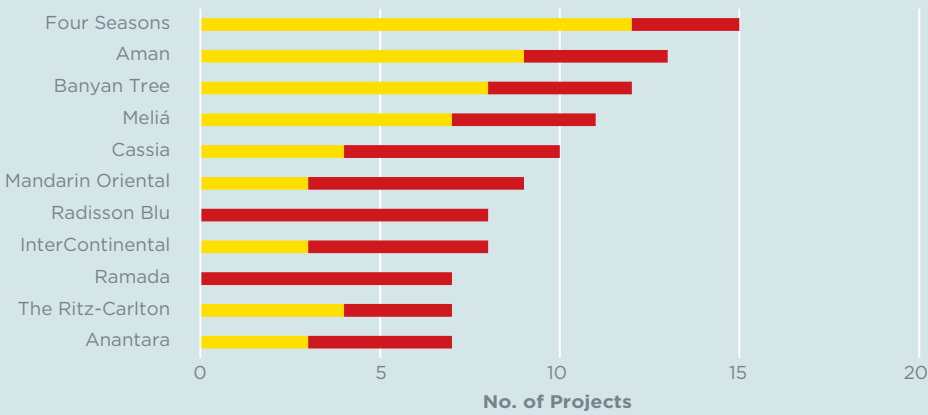
AVERAGE BRAND PREMIUM



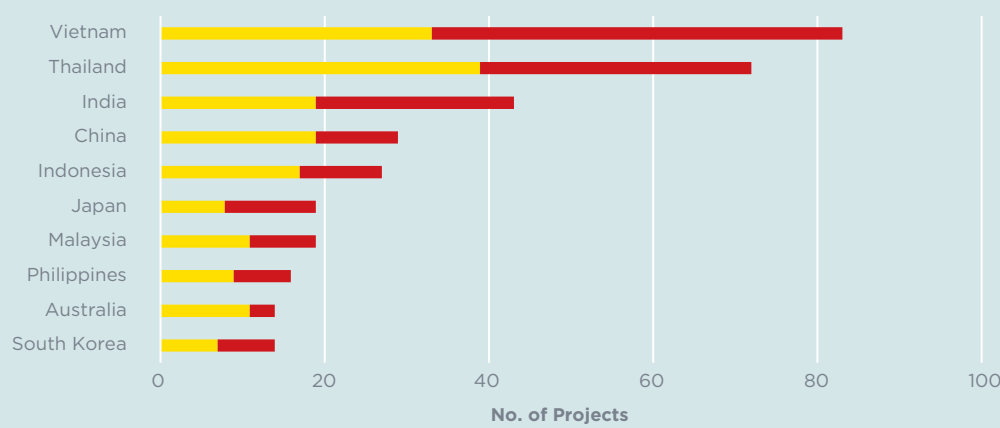
HISTORICAL EVOLUTION



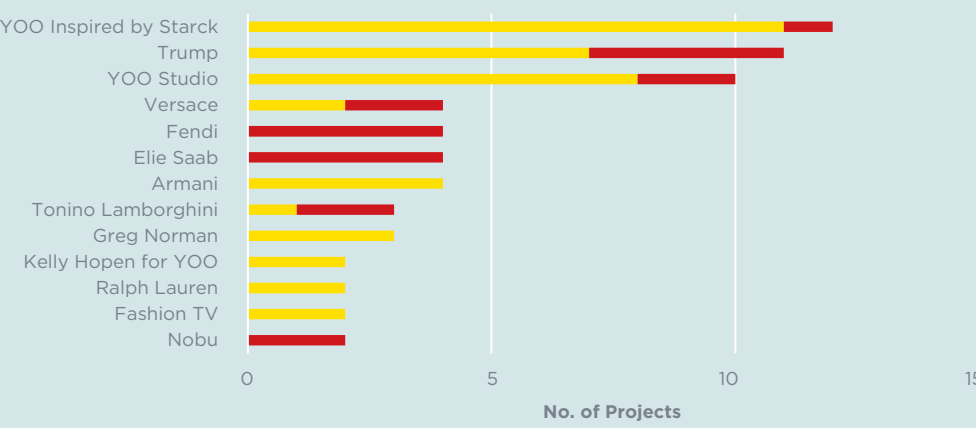
HOTEL BRAND LEADERBOARD



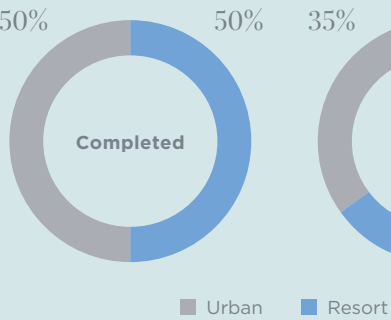
TOP 10 COUNTRIES



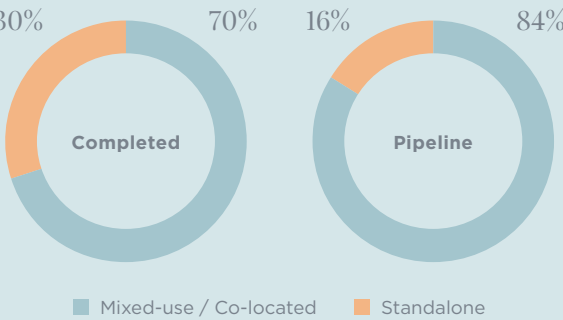
NON-HOTEL BRAND LEADERBOARD



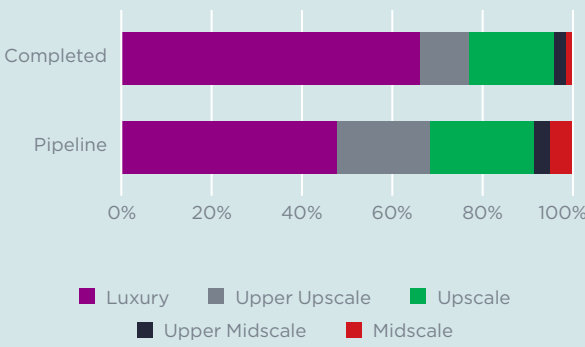
LOCATION TYPE



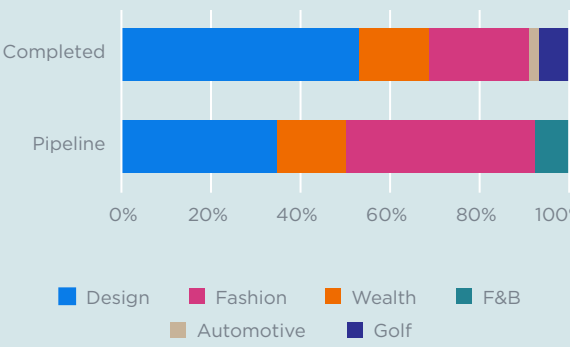
DEVELOPMENT TYPE



HOTEL BRAND CHAINSCALES



NON-HOTEL BRAND CLASSIFICATIONS



GROWTH & GEOGRAPHICAL BREAKDOWN

“Asia Pacific remains a key growth engine for branded residences, but its next chapter will be defined by the breadth of its markets, not the scale of its leading ones.”

Asia Pacific is currently the second most established branded residential region globally, accounting for approximately 23% of all completed schemes worldwide. Whilst the region continues to demonstrate impressive momentum, with a further 187 projects expected to be delivered by 2032, the nature of its growth story is evolving. Although substantial in absolute terms, this growth rate of 97% is level with the Americas and falls behind both Europe and, most notably, the Middle East and Africa, which has emerged as the industry’s fastest-growing region.

Across many of Asia Pacific’s major economies, rapid wealth creation is generating a larger pool of high-net-worth (HNW) and ultra-high-net-worth (UHNW) individuals who are seeking branded residences closer to home. With global billionaire wealth having grown by 121% over the past decade, demand is becoming broader and more structurally embedded within intra-Asian markets, reducing the reliance on international purchasers.

At a country level, Vietnam is the region’s standout growth story. Already one of the world’s most active branded residential markets, it also possesses the strongest future pipeline in Asia Pacific, with forecast growth of 152% by 2032.

Thailand and India remain important contributors, with all three countries featuring amongst the global Top 10 branded residential markets by pipeline activity. However, the region also faces a challenge that increasingly differentiates it from faster-growing global peers. Beyond Vietnam, Thailand and India, the depth of active branded residential markets remains relatively limited. Whilst countries such as Japan, China and Indonesia continue to expand, the concentration of development within a handful of markets restricts the wider region’s ability to accelerate at the pace seen elsewhere.

India, in particular, presents one of the most compelling long-term opportunities globally. With the number of branded projects set to increase by 126% over the next six years, the country’s growth is supported by rapid wealth creation, expanding metropolitan populations and a growing domestic appetite for internationally branded products. Unlike many resort-led markets found across the region, India’s expansion is likely to be increasingly driven by major urban centres, reflecting the country’s unique combination of population scale, economic growth and rising aspirational consumption.



STRUCTURAL TRENDS

One of the defining changes in Asia Pacific’s branded residential market is its significant shift towards resort projects. Whilst resorts account for 50% of completed schemes, this increases to 65% when looking at pipeline projects, supported by the enduring international appeal of destinations such as Bali and Phuket.

Several factors underpin this trend. Asia Pacific remains one of the world’s most important tourism regions, benefiting from growing international connectivity, coupled with rising levels of regional travel. At the same time, affluent buyers from major urban centres are increasingly seeking second homes that serve multiple purposes: lifestyle enhancement, retirement planning, family retreats and investment diversification. As a result, branded resort residences are no longer viewed solely as discretionary purchases, but increasingly as core components of long-term wealth strategies.

Given the growing volume of resort-based branded residential developments, it is unsurprising that co-located projects are becoming increasingly prevalent. The integrated hotel and residential model is particularly well suited to resort destinations, where the operational synergies, shared amenities and enhanced lifestyle offering create a stronger value proposition than standalone residential schemes. Unlike The Americas and Middle East & Africa, where standalone development models are becoming more common, the proportion of standalone developments in Asia Pacific is falling from 30% in completed schemes to just 16% in the pipeline. Typically, standalone developments increase in their prevalence as a market becomes more established and mature, as shown by Bangkok and Ho Chi Minh City both doubling the number of standalone projects in the pipeline to 2032, although their numbers are still limited by international standards.



BRAND LEADERBOARDS & CLASSIFICATIONS

Perhaps the most significant evolution, however, is occurring within the brand mix itself. Previously dominated by luxury operators, Asia Pacific is experiencing a marked diversification across chain scales. Upper upscale, upscale and even selected midscale brands are capturing an increasing share of future development activity. This creates the most diverse branded residential landscape globally, with only 48% of pipeline projects being in the luxury space, followed by upscale, with 23%. The broadening of the market reflects changing buyer demographics and development economics. As domestic wealth expands across a wider audience, developers are increasingly recognising opportunities beyond the ultra-luxury segment. In turn, brands are adapting their residential strategies to appeal to a broader spectrum of purchasers seeking quality, service and brand association at more accessible price points.

Four Seasons and Aman continue to lead the individual brand rankings. Both brands have successfully leveraged the region's historic association with classical luxury hospitality and wellness-focused lifestyles. However, Four Seasons' regional footprint represents around 15% of its total global branded residential portfolio, highlighting the considerable opportunity that still exists for further expansion throughout Asia Pacific.

A particularly noteworthy characteristic of the regional leaderboard is the prominence of "home-grown" brands. Five of the 10 leading hotel brands originate from Asia, demonstrating the strength of domestic brand affinity across the region.

Local brands often benefit from greater cultural familiarity, stronger customer trust and a deeper understanding of local buyer preferences. As domestic demand becomes increasingly important, these factors are becoming powerful competitive advantages.

At a parent company level, Banyan Group continues to hold a leading position. Founded in Singapore, the group has successfully expanded across multiple lifestyle and hospitality brands, allowing it to capture demand across varying customer segments. Meanwhile, Accor's pipeline signals an increasingly balanced global strategy, with Asia Pacific playing a critical role in future growth ambitions. Looking ahead, Wyndham and Radisson warrant particular attention. Both brands have only one completed project in the region. However, their pipelines of 15 and 13 projects, respectively, demonstrate the increasing priority they are placing on regional growth.

Beyond hospitality brands, the non-hotel branded residential sector continues to evolve. Whilst the overall proportion of non-hotel branded developments in Asia Pacific is falling from 23% of completed projects to 14% of pipeline projects, there is still a notable growth in the Fashion and F&B sectors, with Fendi, Elie Saab and Nobu all set to open their first projects in the region within the next six years. Significantly, half of the top 10 non-hotel brands have no publicly reported pipeline projects, indicating a change in the overall structure of the non-hotel sector in the region, in particular a movement away from design brands, with buyers prioritising more tangible lifestyle benefits.

BRAND PREMIUM

In the last 12 months, the average brand premium across Asia Pacific has increased from 23% to 29%. While this remains below the global average of 33%, the rise reflects stronger pricing performance as the region's branded residential sector continues to expand and mature. Historically, premiums have been moderated by the region's comparatively high concentration of upscale, upper midscale and midscale developments, with Asia Pacific remaining the most chain-scale diverse branded residential market globally.

However, the market is becoming more concentrated within resort and hospitality-led developments, which typically achieve some of the strongest premiums globally. In addition, several of Asia Pacific's major urban markets are demonstrating a greater ability to command meaningful pricing uplifts, supported by rising domestic wealth, growing demand for professionally managed residential offerings and the limited supply of high-quality branded schemes. Together, these trends are strengthening the value proposition of branded residences and supporting higher premiums across the region.



REGIONAL OUTLOOK

The Asia Pacific region remains a key player in the branded residential space, yet its future growth story looks materially different from the one that drove expansion over the last decade. Whilst the branded residential growth rate remains strong, the market is entering a phase of maturity which is determined less by international capital inflows and more by domestic fundamentals. Global wealth has recovered strongly, with Asia Pacific emerging as the world's fastest-growing wealth region. The region overtook North America in 2025, recording HNWI wealth growth of 10.5% year-on-year (Capgemini, 2026). Combined with rising regional wealth, many Asian countries have foreign ownership restrictions in place including condominium regulations, elevated acquisition

taxes and policies limiting international buyers to leasehold property only, meaning the sector is becoming increasingly reliant on domestic demand.

This shift in buyer profile is fundamentally shaping the branded residential sector in Asia Pacific. Whilst this market segment is growing at a steadier rate than other regions globally, it is, in fact, diversifying at the fastest rate, moving further away from the global averages and showing its fast adaptation to regional trends, demands and buyer preferences. The brand chain scale expansion, increase in co-located projects and growing prevalence of resort projects are all clear examples of the sector's structural change.



So with the region currently moving away from global norms, how do we expect it to diversify further?

Emergence of master-planned communities: Developers are favouring large-scale, mixed-use communities that combine branded residences with hotels, retail, wellness, leisure and lifestyle amenities. Such schemes tend to offer a wide range of unit types, a proven strategy to deepen the buyer pool. By providing product that appeals to the full range of purchasers (from lifestyle purchasers seeking a premium, service-led living experience all the way to the pure investor attracted by strong rental income potential and capital appreciation. These integrated destinations create a stronger sense of place, diversify revenue streams and offer residents a more comprehensive living experience.

Focus on wellness and longevity: Whilst wellness is becoming a growing priority globally, longevity is deeply rooted in everyday culture. As such, we can expect to see medical wellness, sustainable living and holistic healing in future projects.

Growth in secondary markets: While established destinations such as Phuket, Bali and Bangkok will continue to lead branded residential development, future growth is likely to extend into secondary resort markets. The US has often acted as a precursor for emerging trends in the branded residential sector, and we are now seeing development extend into tertiary regions there. As such, we expect this trend to move globally.

Across Asia, improving infrastructure, rising tourism and increasing domestic wealth are creating opportunities in emerging destinations where land remains more accessible, competition is less intense and premiums may be greater. However, looking at urban developments, the focus still remains on tier one locations.

However, the sector's long-term regional success will ultimately depend on maintaining its appeal to international investors. The Middle East's emergence as a leading branded residences market has been underpinned by supportive government initiatives, including residence-by-investment schemes, competitive tax environments and efficient planning processes. In contrast, a number of Asian markets continue to face policy and regulatory challenges that may restrict inbound investment and, in turn, temper future growth.

With such dynamic changes taking place, Asia Pacific is undoubtedly an exciting region to follow. Looking ahead, the continued evolution of buyer demand, product innovation and market expansion is expected to underpin sustained growth across the region's branded residential sector.





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