savills

BRANDED RESIDENCES

2026/2027



RADISSON BLU HOTEL & RESIDENCES RAK CENTRAL, UAE

FOREWORD

A landmark moment for branded residential supply with the contracted pipeline now set to surpass 2,000 projects across more than 100 countries globally.

Branded residences continue to reach new heights, with leading players continuing to strengthen their position and increase their share of the global market. Yet the sector's continued growth is about more than scale alone. As it expands across new markets, brands and development models, diversification is becoming one of the defining characteristics of its next stage of growth, broadening the reach and appeal of branded living to an increasingly diverse global buyer base.

This evolution brings significant opportunity, but also greater competition. As buyers are presented with more choice, differentiation is becoming increasingly important. The strongest developments will be those where brand, product, location and target buyer come together to create a proposition that is both distinctive and credible. As the sector matures, understanding where a brand can genuinely add value, and how that value translates into the residential experience, will become increasingly important.

This year's Savills Branded Residences report explores the data behind this next phase of growth, alongside the emerging trends reshaping the sector. From new markets and brands to evolving models around rental, wellness and longevity, we consider where the opportunities lie and what may define the next chapter for branded residences.



LOUIS KEIGHLEY

HEAD OF GLOBAL RESIDENTIAL DEVELOPMENT CONSULTANCY

WALDORF ASTORIA RESIDENCES SARASOTA, USA

2026 BRANDED RESIDENCES AT A GLANCE

AVERAGE BRAND PREMIUM
URBAN

ESTABLISHED CITY AVERAGE

28%

EMERGING CITY AVERAGE

30%

NEW CITY AVERAGE

61%

AVERAGE BRAND PREMIUM
RESORT

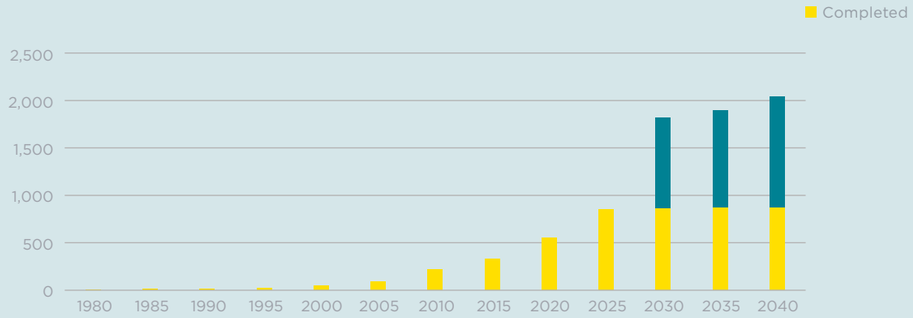
40%

GLOBAL AVERAGE BRAND PREMIUM

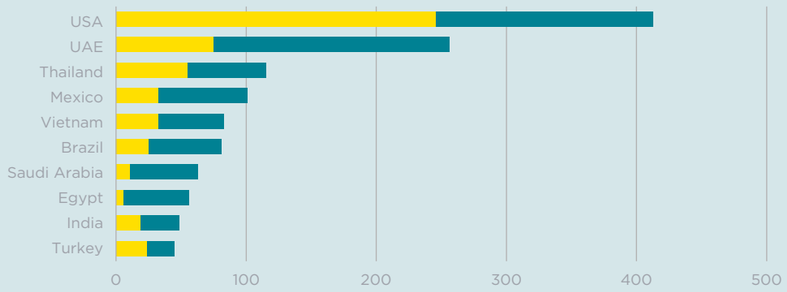


GLOBAL AVERAGE

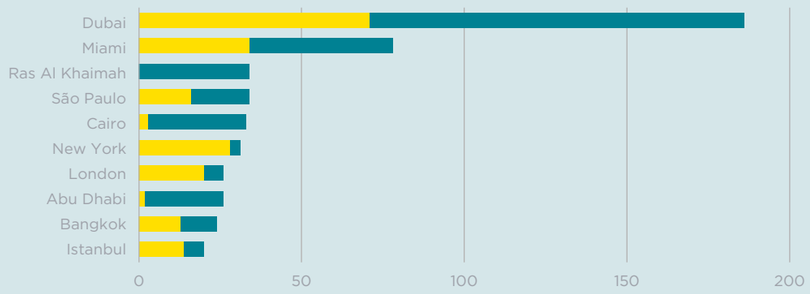
HISTORICAL EVOLUTION



TOP 10 COUNTRIES



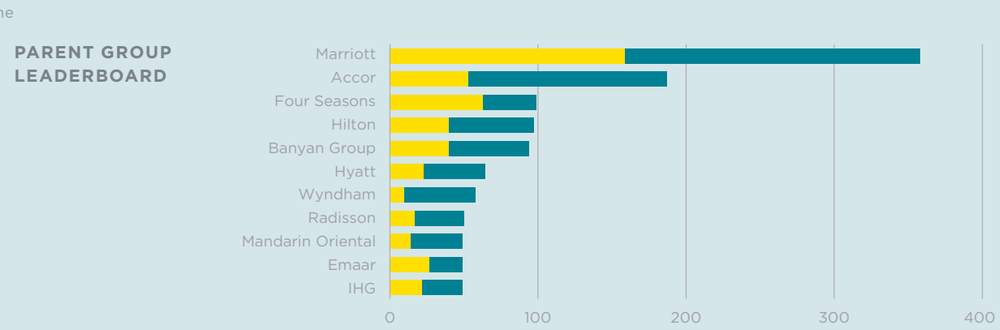
TOP 10 CITIES



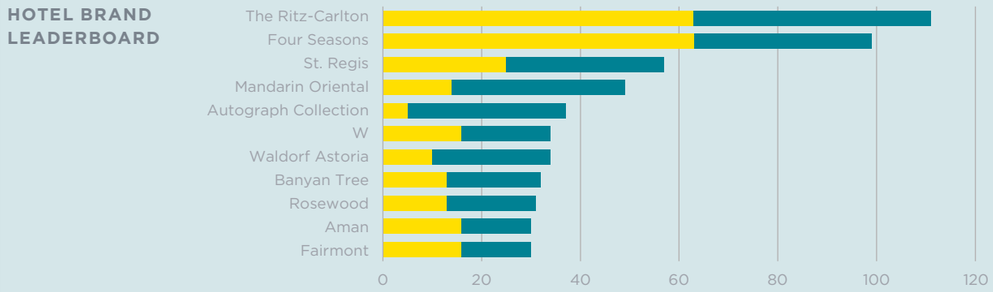
Source: Savills Global Residential Development Consultancy

FACT SHEET

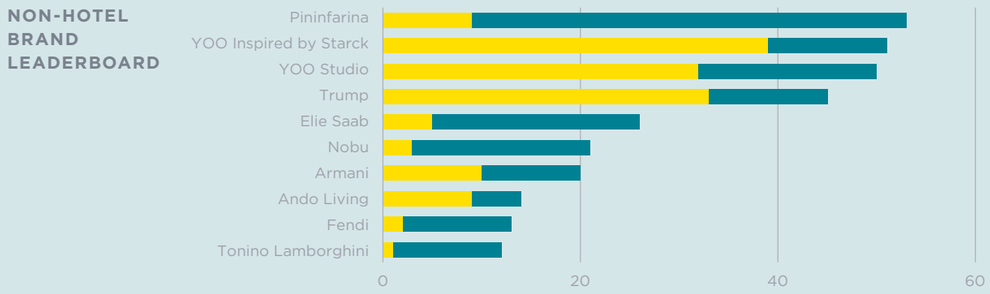
PARENT GROUP LEADERBOARD



HOTEL BRAND LEADERBOARD



NON-HOTEL BRAND LEADERBOARD



MARKET OVERVIEW 2026

Growth & Geographical Breakdown

PROJECTED YOY GROWTH BY YEAR-END 2026
(ASSUMING ALL PIPELINE PROJECTS COMPLETE AS SCHEDULED)

GLOBAL
+24%

ASIA PACIFIC
+19%

THE AMERICAS
+18%

EUROPE
+25%

MIDDLE EAST & AFRICA
+51%

Another year of strong growth lies ahead for the branded residential sector, with the Middle East & Africa continuing to lead the way. Based on projects currently scheduled for completion, the global branded residences market is projected to grow by 24% by year-end 2026, marking a substantial acceleration from the 8% growth recorded in 2025.



KEMPINSKI RESIDENCES MIAMI DESIGN DISTRICT, USA



MARAVÉ MANUEL ANTONIO, LXR RESIDENCES, COSTA RICA

Regional Diversity

The pipeline signals a clear rebalancing of the global branded residences market, both in terms of future market share and relative growth rates.

North America remains the largest completed market, accounting for over 30% of completed global supply. However, its growth trajectory is being outpaced by several emerging regions. Looking ahead to 2040, Asia Pacific is currently set to be the largest market, accounting for 24% of global supply, although only marginally ahead of the Middle East & Africa (23%) and North America (22%). Meanwhile, Caribbean & Latin America and Europe lag slightly further behind with a forecasted market share of 16% and 15% respectively by 2040.

Despite global supply becoming more evenly distributed across the regions by 2040, with no single region accounting for more than a quarter of the market, the growth picture tells a different story. While Asia Pacific is expected to account for a marginally larger share of global supply, the Middle East & Africa represents the sector's most compelling growth story, with growth of 255% from the 2026 base to 2040. This level of activity is set to significantly reshape the regional distribution of branded residences and position the Middle East as one of the biggest drivers of global change in the sector.

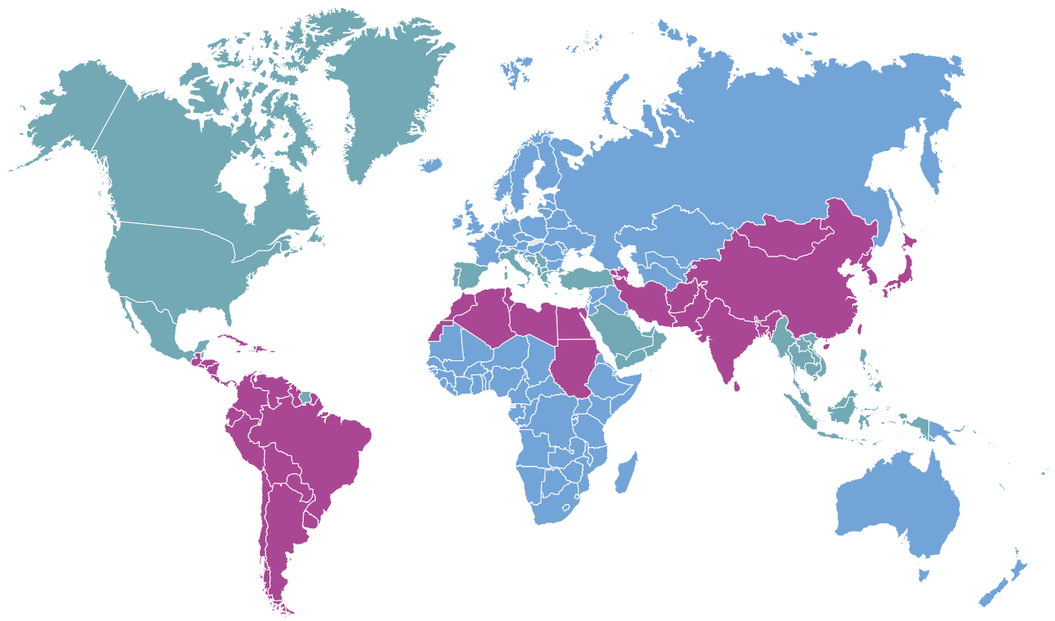
Caribbean & Latin America is also gaining momentum, with stock expected to increase by more than 200%, reflecting growing developer confidence across both established resort destinations and emerging urban markets.

Meanwhile, Asia Pacific and Europe are growing more steadily. With their respective development pipelines slightly above current stock, Asia Pacific is expanding by 125% and Europe by 111%, based on current completed projects. Overall, future growth is becoming less concentrated in established markets and more evenly distributed across emerging and high-growth regions.

SUB-REGIONAL GROWTH

Regional trends tell only part of the story. At a more granular level, the branded residences landscape is becoming increasingly diverse, with established hubs such as North America and Southeast Asia being joined by a new wave of growth across the GCC, the Caribbean, Latin America and Southern Europe.

ACTIVITY HOTSPOTS - PIPELINE PROJECTS BY REGION



Today, branded residences remain highly concentrated within a handful of sub-regions. North America is the largest completed market globally, accounting for over 270 completed projects, reflecting the sector's long-established presence across the United States and Canada. Southeast Asia follows with over 130 completed schemes, driven primarily by Thailand and Vietnam, two markets that have become synonymous with large-scale resort and hospitality-led branded residential development.

The Gulf Cooperation Council countries (GCC) along with Southern Europe complete the leading group of sub-regions, although their stories are notably different. In the GCC, growth is heavily anchored by the UAE, whereas Southern Europe's success is distributed across a wide range of markets, including Turkey, Portugal, Spain and Greece, highlighting the breadth of destinations capable of supporting branded residential product.

LEADING REGIONAL PIPELINES: 100+ PROJECTS









Looking ahead, North America, the GCC and Southeast Asia are all expected to remain at the forefront of the sector. Meanwhile, Southern Europe remains one of the sector's most geographically diverse markets, drawing strength from a broad collection of established Mediterranean destinations rather than a single dominant country.

The most interesting story lies in the markets moving from peripheral participants to increasingly meaningful contributors. Northern Africa stands out, with stock expected to increase by more than 400%, driven overwhelmingly by Egypt and Morocco. The Caribbean is following a similarly dynamic path, with pipeline supply approaching three times current stock, reflecting growing confidence in the region's resort-led and second-home markets. Central America and South America are also gaining momentum, with pipeline volumes equivalent to 183% and 200% of completed stock respectively. In both cases, growth is heavily concentrated within a single sub-market: Mexico in Central America and Brazil in South America.

At the same time, a number of smaller sub-regions are beginning to emerge as the industry's next frontier. The Caucasus region, spanning Georgia, Armenia, and Azerbaijan, records one of the most striking growth stories globally, with pipeline growth of 3,800%, although this expansion is driven primarily by Georgia. Central Asia and Southern Africa are also expected to grow to more than three times their current scale, albeit from much smaller starting points. Whilst these markets remain modest in absolute scale, their growth reflects a broader shift within the branded residences sector. Developers and operators are increasingly willing to enter destinations at an earlier stage of market maturity, seeking to establish a presence ahead of future tourism growth, infrastructure investment and wealth creation.

Taken together, the sub-regional picture highlights a sector evolving along two distinct but complementary paths. Core hubs such as North America, Southeast Asia, the GCC and Southern Europe continue to deepen and mature, reinforcing their position as the industry's core markets. At the same time, frontier destinations from Northern Africa to the Caucasus and Central Asia are beginning to attract meaningful levels of activity, creating a more geographically diverse development landscape. The next phase of branded residential growth is therefore likely to be driven not only by the expansion of existing centres, but also by the emergence of entirely new ones.

STRUCTURAL TRENDS



FOUR SEASONS RESORT AND RESIDENCES RED SEA AT SHURA ISLAND, SAUDI ARABIA

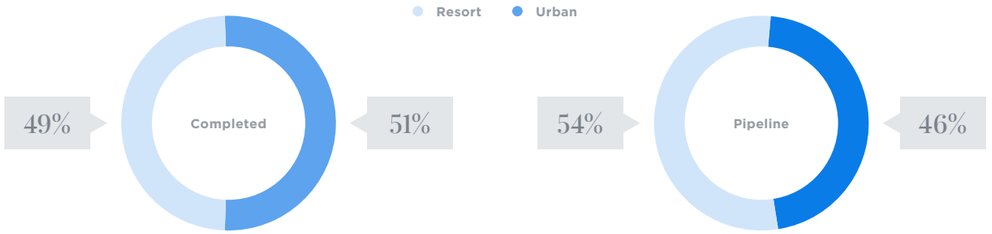
Location Type: *Urban vs Resort*

Historically, the global branded residences market has maintained a broadly even split between urban and resort projects. More recently, however, the balance has begun to shift, with resort destinations accounting for an increasing share of development activity. Statistically, resorts have gained a further percentage point of completed market share over the past year, now reaching 49%. As their share of the pipeline continues to rise, resorts are set to overtake urban schemes globally by 2029. This would represent a landmark moment in a long-term shift. Back in 2018, urban projects accounted for 74% of the market. Since then, expansion into coastal, alpine and rural destinations has transformed a product once concentrated in major cities into one increasingly associated with leisure and second-home markets.

The direction of travel is visible across every region, although its pace varies. Europe and Asia Pacific are leading the movement, with well over 60% of each region's pipeline located in resort destinations. By contrast, urban projects still comprise more than half of the pipeline in Middle East & Africa and North America, reflecting the continued importance of gateway cities and rapidly expanding metropolitan markets.

These differences demonstrate the adaptability of branded residences. In competitive urban markets, brand, service and amenity can distinguish a project. In resorts, professional management, rental potential and turnkey ownership respond to the priorities of internationally mobile purchasers. The global shift is therefore not towards a single formula, but rather towards products fitted specifically to local demand.

LOCATION TYPE



Source: Savills Global Residential Development Consultancy

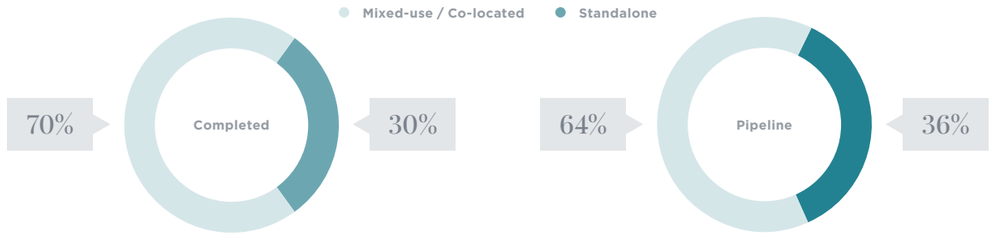
Development Type: *Co-located vs Standalone*

The structure of branded residential developments is also evolving. Standalone residences represent 36% of the global pipeline, up from 33% last year. Co-located schemes remain central to the sector, but the gradual rise of standalone projects shows that having an adjoining hotel is becoming less essential.

This shift is particularly pronounced in the Middle East, where nearly half of pipeline projects are standalone. It reflects a mature market in which developers and buyers understand the proposition, whilst brands can deliver a credible residential experience without relying on a hotel for visibility, operational viability or consumer confidence. Of equal significance, the increase in non-hotel branded projects in the region will also inherently contribute to the rising standalone count.

As the standalone market continues to grow, operators still need to show how standalone schemes cover the cost of services and amenities without a hotel. This growing pipeline will undoubtedly be watched closely to understand how operators solve these challenges.

DEVELOPMENT TYPE



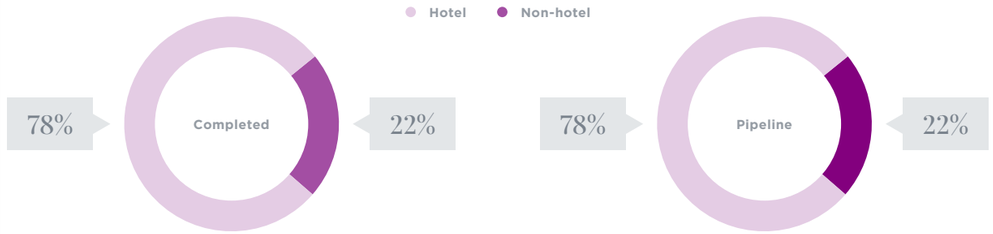
Source: Savills Global Residential Development Consultancy

Classification Type: *Hotel vs Non-hotel Brands*

The hotel vs non-hotel split is holding steady at 78% to 22% for the first time. Yet this apparent stability does not indicate a static market. Over 40 non-hotel brands have declared pipeline schemes to be developed between now and 2040. Of these, approximately 20 are yet to offer any operational projects to date, showing that diversification is still progressing, even if it has not yet altered the headline split. However, it is not just the non-hotel landscape that is changing; hotel brands are bolstering their brand portfolios too.

The next phase may therefore be defined not so much by a dramatic transfer of market share, but rather by the breadth of brands within each category. Hotel operators retain advantages in service delivery, operations and consumer trust, whilst non-hotel brands can offer design identity, lifestyle appeal and engaged customer following. Their long-term success will depend on how these qualities are translated into credible and enduring residential experiences.

CLASSIFICATION TYPE



Source: Savills Global Residential Development Consultancy

BRAND ACTIVITY

Marriott continues to lead at parent-group level with over 350 completed and pipeline projects through to 2040, almost twice the number recorded by Accor in second place.

For both groups, their extensive portfolios of brands span multiple price points and buyer profiles, enabling them to pursue opportunities ranging from ultra-luxury residences to upscale and rental-oriented investment products. As the market diversifies, this breadth is likely to further reinforce their leadership.

Wyndham is a notable climber, with a pipeline nearly five times the size of its completed portfolio. Its expansion provides further evidence that branded residences are extending beyond their traditional luxury base and gaining momentum in the upscale and midscale segments, supported particularly by the Ramada brand.

At individual-brand level, the leading names remain familiar, although Waldorf Astoria and Banyan Tree have entered the top ten. Four Seasons, Mandarin Oriental, Rosewood and Aman also retain prominent positions, underlining the value of a clear identity and established service reputation. Alongside them, nearly 50 hotel brands are currently expected to deliver their first residential projects by 2040, highlighting the growing need for diversification across the sector, a key theme in this year's opinion pieces.



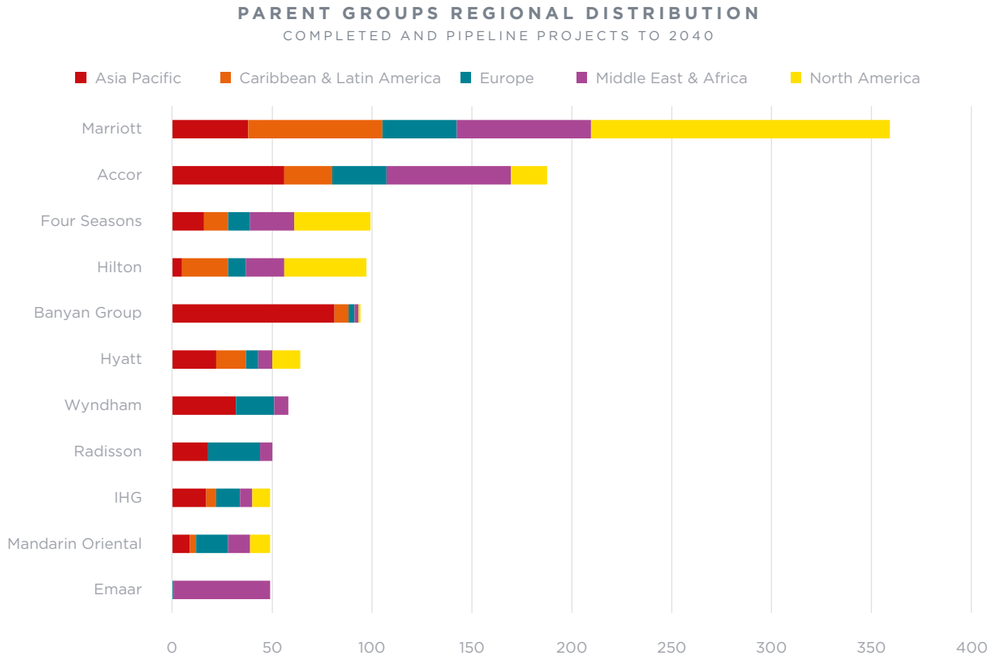
RADISSON RESIDENCES AL REEM ISLAND, UAE

Hotel Brand Activity by Region

Regional distribution reveals distinct expansion strategies among the leading parent groups. Marriott has by far the largest North American presence in the leading parent group analysis, whilst Banyan Group is concentrated in Asia Pacific, where nearly 90% of its projects are located. These patterns reflect both corporate strategy and the regions in which brands first established their reputations.

Other groups take a different approach. Both Wyndham and Radisson span Asia Pacific, Europe and Middle East & Africa, but have no projects in North America or the Caribbean & Latin America. This is particularly notable for Wyndham, given that it is headquartered in the US. Meanwhile, Emaar is the clearest outlier with its dominance in the Middle East & Africa, reflecting its evolution from a regional master developer into a hospitality brand owner.

Although many brands target the same established cities and resort destinations, geographic expansion is most effective where a brand has clear relevance to the market and its buyers. For example, Banyan Tree's proposition is built around privacy, sanctuary and multigenerational living, principles that resonate strongly with many buyers across its core Asian markets. Existing recognition, operating networks and developer relationships give groups an advantage in their strongest regions, making these markets the most likely focus for further growth. Expansion into less familiar geographies will remain more selective and will depend on whether the brand can offer a distinctive and locally relevant residential proposition.



Source: Savills Global Residential Development Consultancy

Hotel Brand Chain Scale

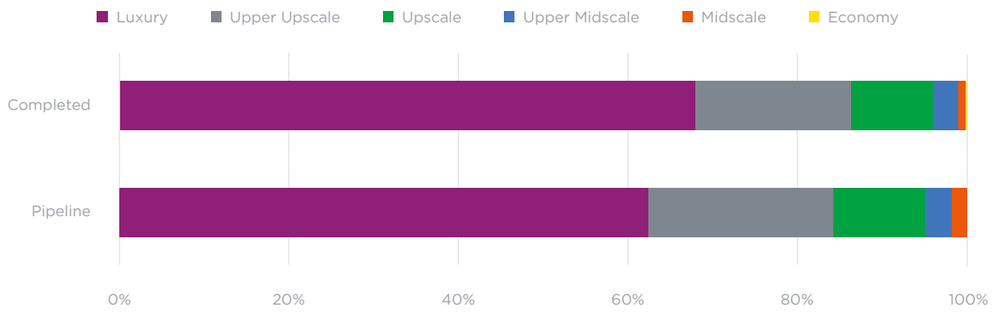
Diversification is also apparent by chain scale. Luxury remains dominant in absolute terms, but its global share is reducing whilst other categories are maintaining or increasing their representation. Asia Pacific shows the strongest movement away from luxury, with only 44% of the pipeline classed as “luxury”, whereas Europe is the only region moving towards a greater concentration of luxury projects, increasing from 54% of the current stock to 63% of pipeline projects.

Although still small, the midscale segment is close to trebling in project numbers within the next three years, suggesting that service, lifestyle and convenience can appeal across a wider range of price points. The challenge for operators will be to translate these benefits into models that remain operationally viable whilst meeting the expectations of a more value-conscious purchaser.



KEMPINSKI RESIDENCES DUBAI CREEK, UAE

HOTEL BRAND CHAIN SCALES



Source: Savills Global Residential Development Consultancy



ONE&ONLY FIJI PRIVATE HOMES, FIJI

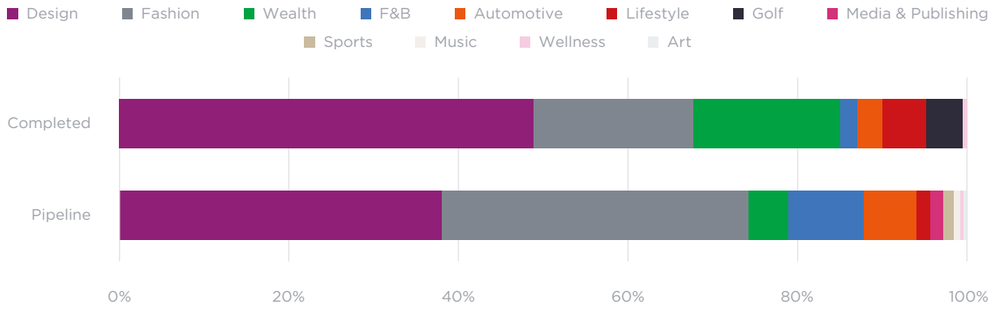
Non-hotel Brand Classification and Activity

Diversification is even more pronounced among non-hotel brands. Design brands remain the largest category but now account for under half of completed non-hotel schemes and 38% of the pipeline. By contrast, fashion brands are the strongest growth area, comprising 36% of the pipeline. Design brands benefit from visual identities that translate naturally into interiors and from established loyal customer followings, whilst offering buyers a more distinctive means of expressing their personal taste and identity through their home.

Pininfarina now leads the non-hotel leaderboard, supported by a substantial pipeline concentrated in Central & Latin America. Elie Saab, Fendi and Tonino Lamborghini are also among those with particularly strong future growth profiles.

These newer participants tend to have more projects in development than in operation, whereas the early entrants into the space, such as YOO and Trump, now have pipelines smaller than their completed portfolios. This generational shift is likely to keep the non-hotel rankings more fluid than their hotel counterparts. Early entrants proved that brands from outside hospitality could credibly extend into real estate. Off the back of their early success, an ever-increasing number of non-hotel brands are looking to join this competitive space, suggesting that the future non-hotel landscape is likely to become increasingly diverse, with success dependent not simply on brand recognition, but on the ability to translate a brand’s core proposition into a credible and compelling real estate product and residential experience.

NON-HOTEL BRAND CLASSIFICATIONS



Source: Savills Global Residential Development Consultancy

BRAND PREMIUM

AVERAGE BRAND PREMIUM

The 2026 Global Brand Premium Study is our most extensive to date, building on the framework introduced in 2025. Last year's revisions to market definitions and methodology provided greater clarity on how premiums vary across different stages of market maturity, enabling a more nuanced assessment of performance across global markets.

GLOBAL AVERAGE





28%

ESTABLISHED CITIES
are classified as those with 15 or more completed branded residential schemes



30%

EMERGING CITIES
are those with between three and 14 completed projects



61%

NEW CITIES
are characterised by those offering fewer than three schemes



40%

RESORT
Leisure-led schemes typically supported by a strong tourism offering



THE RESIDENCES AT INTERCONTINENTAL SAPA RESORT, VIETNAM



THE FALCON BY YOO, GURGAON, INDIA

Savills 2026 analysis reports a global average brand premium of 38% (up from 33% in 2025), reinforcing the continued pricing power of branded residences across a growing range of markets. Whilst premiums in Established and Emerging Cities remain broadly aligned, the most notable findings are found in New Cities, where branded residences are increasingly setting entirely new benchmarks for residential value.

With an average premium of over 60%, New Cities are demonstrating the substantial uplift that can be achieved when an internationally recognised brand enters a market with limited existing branded inventory. In many of these locations, branded residences are not competing against existing branded stock but introducing a product, service and lifestyle offering that has little direct competition within the local market. As a result, buyers are often willing to pay a significant premium for the certainty, quality and global network associated with an established brand.

This opportunity is accompanied by a greater degree of variability. Whilst some schemes achieve exceptional premiums, performance remains heavily influenced by market selection, product positioning and execution. As the sector continues to expand into new destinations, developers and brands are increasingly focused on identifying locations where branded residences offer true differentiation rather than competing within already established branded residential markets.

Established Cities, meanwhile, continue to demonstrate remarkable resilience. Despite greater competition and a growing depth of inventory, premiums remain robust at 28%, reflecting the enduring appeal of branded living in mature markets. Emerging Cities achieve a similarly strong average premium of 30%, demonstrating that the pricing power of branded residences remains resilient as markets develop. Resort markets achieve an average premium of 40%, reinforcing the value that branded residential product can command in leisure-led locations. Rather than signalling a slowdown, this suggests the sector is entering a more sophisticated phase of growth, where value is driven not only by the strength of the brand itself, but by the quality and level of the residential offering.

However, premium alone does not determine project success. Developers must balance the pricing of a scheme against market liquidity and their wider commercial objectives. In some markets, achieving the highest possible premium may come at the expense of sales velocity, whilst in others a more measured premium can broaden the buyer pool and accelerate sales. Equally, the role of branding may extend beyond maximising price, supporting objectives such as de-risking a project, enhancing market positioning, attracting a new buyer demographic or generating value across a wider mixed-use development. The strongest performing branded residential projects are, therefore, not necessarily those that achieve the highest premiums, but those that strike an effective balance between value creation and absorption, optimising both pricing and pace of sales.

Branded Residences have become *easier* to sell, but *harder* to differentiate



BY HENRY COLLINS



WITH JEMIMAH WHITE

The branded residences sector has matured. Buyers no longer need convincing that branded residences work. Instead, developers, brands and sales teams face an entirely different challenge: standing out in an increasingly crowded marketplace.



ME DUBAI, UAE

There was a time when selling a branded residence began with explaining the concept. Why buy a home associated with a hotel or lifestyle brand? What does the brand provide? Why should a purchaser pay more for it?

That conversation has moved on. Savills is selling more branded residences than ever before, in territories all around the globe. The rapid expansion of the sector, across new markets, brands and development types, means international buyers are increasingly familiar with branded living. They understand the broad promise: a high-quality residence, professional management and access to the services and experiences they associate with the brand.

Buyers are no longer evaluating the concept in isolation; they are often comparing one branded residence against another, across different countries, brands and lifestyle propositions. More developments mean more residences competing for the same purchaser.

For sales teams, this fundamentally changes the conversation. Jemimah White – Sales Negotiator for Savills specialist Global New-Homes sales team – recalls that many purchasers already begin their purchasing journey with a shortlist of brands, locations and competing developments in mind. The branded residence itself has therefore become the competitive set.



MANDARIN ORIENTAL RESIDENCES, BARCELONA, SPAIN

Buyers are comparing identities

As branded residences have proliferated, many of those developments have become comparable in terms of specification, finish, service and amenity provision. This increasingly places differentiation on less tangible factors.

Where previous generations of purchasers may have been reassured simply by seeing an established hospitality flag above the doorway, buyers today are asking a different question:

“If they’re all branded, what makes this one truly different?”

The answer is rarely found in a brochure.

In most cases, the difference is an identity that feels aligned to their own. For some that is wellness, for others, design.

Some buyers simply identify with a hospitality brand they have come to know and trust through their travels. Others are attracted to brands that reflect their personality, interests or lifestyle aspirations.

Familiarity has made buyers more discerning than ever

Greater familiarity with branded residences means buyers increasingly understand the differences between operators and are quicker to identify the propositions that resonate with them.

As Jemimah explains, purchasers who have stayed with certain hospitality brands often arrive with strong preconceptions, both positive and negative. Previous experiences influence expectations, making it easier for some developments to establish credibility whilst requiring others to work harder to explain their relevance. Familiarity has, therefore, not reduced scrutiny. In many respects, it has increased it.



SIX SENSES RESIDENCES COMPORTA, PORTUGAL

Differentiation will always be divisive

Meaningful differentiation does not come from appealing to everyone. It comes from making clear choices.

“Choosing a branded residence is a little like choosing a fine wine,” says Jemimah. “Two bottles may command the same price and be equally acclaimed, yet offer entirely different experiences. When you sit down and look at the wine list you can appreciate both, but feel a far stronger connection to one. Branded residences are much the same.”

This is apparent in Brickell, Miami, where two branded schemes present very different interpretations of luxury. Mercedes-Benz Places emphasises technology, mobility and modern urban living, with features including Mercedes-Benz house cars, electric-vehicle charging and an F1 simulator. Baccarat Residences draws upon French craftsmanship, glamour and personalised service through its chandeliers, grand salon, wine-tasting facilities and waterfront hospitality.

Both offer substantial amenity and service provision, but they are not interchangeable. One speaks to buyers attracted to innovation and precision; the other to those drawn to craftsmanship and theatre. A purchaser may recognise the quality of both while strongly identifying with only one.

That polarisation is not a failure of positioning – it is evidence that positioning exists. In a crowded market, the greater risk may be a development that nobody dislikes, but nobody feels compelled to own. The strongest schemes will not necessarily appeal to everyone but will mean something specific to the right group of buyers.

The best developments are becoming harder to replicate

Among the developments that generate the greatest interest are those where the brand, design, location and overall experience combine to create something distinctive.

Mandarin Oriental’s defining proposition combines exceptional, highly personalised service with a strong sense of place and understated elegance, making it a natural fit for the urban setting of Mandarin Oriental Residences, Barcelona. In Passeig de Gràcia, the residences leverage their historic Barcelona address, views across the city and proximity to Gaudí’s architecture, creating a sophisticated city residence where the destination itself becomes part of the service-led brand experience. It makes the brand promise tangible.

The Six Senses brand is centred on wellness, sustainability and a deep connection to place, which finds a natural expression within the coastal landscape at the Six Senses residences in Comporta. The development’s Sand, Forest and Lake Homes are more than product categories; they are a direct reflection of the surrounding dunes, pine forests and waterways that shape the destination’s identity. Rather than imposing the brand onto the landscape, the residences allow the landscape itself to become part of the Six Senses experience, reinforcing the brand’s focus on nature, wellbeing and mindful living.

This alignment matters because sophisticated purchasers can distinguish between a meaningful brand relationship and one that has simply been applied to a development. A prominent name may create visibility, but it cannot compensate for a weak relationship between the brand, product and destination.

In a sector offering buyers more choice than ever before, the developments that stand apart will be those where brand, destination, product and ownership experience combine to create a proposition that is not only recognisable, but difficult to replicate.

The objective is no longer simply to deliver a branded residence. It is to deliver a branded residence that could not convincingly carry another name above the door.



FOUR SEASONS RESORT AND RESIDENCES RED SEA AT SHURA ISLAND, SAUDI ARABIA

Would you *rent* a Branded Residence?



BY ROSIE TUCKER

For decades, the branded residential model has been built around ownership. Developers partner with globally recognised brands to offer residents enhanced design, professional management and hospitality-led services, whilst purchasers pay a premium for the lifestyle and brand association on offer through ownership.

As branded residences are set to surpass 1,000 completed schemes globally this year and continue to expand into new geographies and brand categories, the sector faces an important question. What happens when consumers still desire the lifestyle, service and experience of branded living but no longer want to own the underlying real estate?

Interestingly, the foundations of this concept already exist, with over 50% of completed branded developments offering rental programmes. Whilst these programmes were largely designed to offset ownership costs rather than replace ownership altogether, they show that owners already value flexibility.

OPINION



DELANO RESIDENCES & HOTEL MIAMI, USA

Build-to-Rent changed the rules

The closest comparison may not come from hospitality at all, but from the residential space and evolution of Build-to-Rent.

Historically, residential real estate operated on the assumption that homeownership represented the preferred tenure model. Rental housing was often fragmented, inconsistently managed and viewed as a temporary solution rather than a lifestyle choice. However, changing demographics, rising housing costs and increasing demand for flexibility created an opportunity for a different type of product. Build-to-Rent emerged as a purpose-built rental model, typically owned and professionally managed by institutional investors rather than individual landlords, placing greater emphasis on resident experience and long-term retention.

Whilst the nuances of the sector vary globally, Build-to-Rent succeeded because it shifted the conversation away from ownership and towards experience. Professional management, resident amenities, convenience and community became core drivers of demand. What began as a niche concept has since evolved into a mainstream institutional asset class. In the UK, Build-to-Rent developments achieved an average rental premium of 12.3% over the wider Private Rented Sector in 2025 (Zero Deposit, 2026)[1], reflecting residents' willingness to pay more for professionally managed living environments and enhanced amenities. These parallels with branded residences are difficult to ignore.

Many of the attributes that contribute to the success of Build-to-Rent are already embedded within the branded residential proposition. Professional management, concierge services, wellness facilities, amenity-rich environments, community programming and lifestyle-focused design are key pillars which underpin branded residential premiums. Branded residences have evolved to deliver the type of experience-led living that modern residents increasingly seek.

The next Branded Residential occupier

The potential market for rental branded residences may be broader than many assume. The wider prime residential market demonstrates the potential of an income-led model. Across the Savills World Cities Prime Residential Index, which monitors 30 cities globally, prime rents grew by 1.1% in the six months to June 2026, ahead of capital value growth of 0.5%, whilst average prime residential yields remained fairly stable (Savills, 2026)[2]. Although the opportunity will be highly location-sensitive, stronger rental performance could make branded rental residences an increasingly credible alternative where sales growth is more subdued and affluent occupier demand is sufficiently deep.

Global professionals, entrepreneurs, and lifestyle-driven residents increasingly value mobility and flexibility. As careers, businesses and lifestyles become more international, there is growing opportunity for models that allow consumers to enjoy the benefits of branded living without committing significant capital to a single residence. For some, renting a branded residence or participating in a flexible ownership model can provide access to the service, amenities and lifestyle associated with branded living, while allowing greater freedom to adapt as their circumstances and priorities evolve.

This trend is already evident across numerous other luxury sectors. Consumers increasingly utilise private aviation membership or jet cards, charter yachts rather than own them and join private members' clubs rather than acquire second homes. Access increasingly competes with ownership as the preferred route to luxury consumption.

[1] Zero Deposit (2026), reported in Letting Agent Today, "Build To Rent premium far higher than mainstream rentals – data", 30 June 2026.
[2] Savills Research (2026), Prime Residential World Cities, H1 2026. Available at: Savills Prime Residential World Cities H1 2026 (accessed September 2026)

Could rental create recurring brand revenue?

Traditionally, brands generate most of their income at the point of sale, through licence fees on sales. Success is largely determined by project signings, development pipelines and lump sum licence fees on residential sales. Whilst this model has proven enormously successful, most of the revenue comes in the early stages of the project.

A rental model introduces a different proposition: recurring revenue, continuous customer engagement and a relationship that extends beyond the point of purchase.

Rental offers the potential for deeper brand interaction. A tenant within a branded environment engages with the brand daily through service interaction and amenity experience, reinforcing the brand relationship. The decision to rent long-term in a branded building may deepen brand loyalty.

The questions nobody can yet answer

The most important consideration is whether renters value a brand in the same way that purchasers do. The branded residential sector has repeatedly demonstrated that buyers are willing to pay substantial premiums to own a branded unit. Whether renters would be willing to pay a further premium above the uplift already achieved by premium Build-to-Rent schemes remains largely untested.

For institutional investors, this is the central consideration. Branding introduces licence fees, operational requirements and service standards that increase both the initial investment outlay and the ongoing operational costs. These additional costs must ultimately be justified through stronger occupancy, higher rents and improved resident retention.

Branded rental residences must also establish a clear distinction from the serviced apartment sector. Whilst serviced apartments such as Staycity Group are designed primarily around temporary stays, branded residences for rent would need to offer a genuine long-term home, combining permanence with hospitality-led service.

There are also important brand considerations. Greater resident turnover inevitably means less control over who ultimately occupies the building. Whilst brands and developers often play an active role in the sales process of traditional branded residences, maintaining the same level of oversight within a rental environment may prove more challenging. The balance between increased exposure and potential brand dilution will require careful consideration.



MÖVENPICK RESIDENCES KVARNER BAY, CROATIA

Could lifestyle replace ownership?

Whilst still a niche concept today, there are now some rental-specific brands entering the space, such as Flow, which aims to create communities that are connected through wellbeing and experiences. Many leading hospitality groups, such as Marriott and Accor, have serviced-apartment offerings; however, there are also cases where global hotel brands agree to use rental as an alternative strategy when sales momentum slows. Yet these tend to be isolated examples rather than hospitality leaders offering purpose-built branded rental communities.

Branded residences for rent will not suit every brand, location or development, as many luxury brands continue to derive much of their value from exclusivity and ownership. However, where projects have sufficient scale and strong underlying rental demand, the opportunity becomes more compelling and this could support the additional cost of branding. The addition of a recognised brand could create a differentiated rental product capable of commanding a premium in increasingly competitive rental markets.

As the branded residential sector continues to mature, purpose-built rental projects may represent one of its most credible avenues for growth, opening branded living to a broader audience whilst creating new opportunities for developers, investors and brands alike. The question is whether the industry is prepared to embrace these opportunities at scale.

OPINION

Wellness to *longevity*: The next evolution of Branded Residences?



BY JASMINE HOPKINS

Population ageing is one of the most significant demographic shifts of our time. By 2030, one in six people worldwide will be aged 60 or over, with the global population in this age group rising from one billion in 2020 to 1.4 billion (World Health Organization, 2025)[1].

Whilst people around the world are living longer than ever before, the WHO notes that longer lives do not necessarily mean healthier lives. As a result, consumers are increasingly focused on improving health span rather than simply extending lifespan.

Wellness has been a defining trend across hospitality and real estate. Developers and brands have responded through state-of-the-art fitness facilities, spas, nutritional and lifestyle programming designed to support physical and mental wellbeing. In branded residences, wellness has evolved from a differentiator to an expectation, with many developments positioning health and wellbeing at the centre of their residential offer.

However, as consumer expectations continue to evolve, longevity is becoming an increasingly prominent topic of conversation.



SIX SENSES RESIDENCES TRIPLE BAY, AMAALA, SAUDI ARABIA

Wellness vs Longevity

Wellness is about feeling better today. Longevity is about staying healthier for longer.

Whilst the two are closely connected, wellness focuses on improving quality of life in the present, whereas longevity is concerned with preserving health for the future. The goal is not simply to help people feel well today, but to maximise the number of years spent in good health and maintain physical, cognitive and emotional performance over time.

The distinction is subtle but important. Wellness is often centred on experiences and lifestyle choices, whereas longevity is grounded in prevention, measurement and optimisation. A spa treatment may reduce stress and improve wellbeing in the short term. A longevity programme seeks to understand how stress is affecting the body, track its impact through biomarkers and implement interventions that improve long-term health outcomes.

Wellness in Branded Residences

Wellness has become a defining feature of branded residential developments, shaping everything from building design to amenity provision in response to growing consumer demand for healthier lifestyles. Leading hospitality brands have been at the forefront of this evolution. Six Senses has built its residential proposition around holistic wellness, while SIRO, a Kerzner brand, places fitness, recovery and performance at the core of its offering. Beyond dedicated wellness brands, many hospitality operators are embedding wellbeing into their residential offerings. Programmes such as Rosewood's Asaya wellness initiatives and Aman's cultural and wellbeing experiences reflect a broader trend.

The shift from wellness to longevity is already beginning to take shape within branded residences. Early adopters include both hotel and non-hotel brands, although their approaches differ. Non-hotel brands such as SHA and Equinox have built residential offerings around health optimisation, performance and preventative wellbeing. Meanwhile, hospitality brands are increasingly integrating longevity into existing wellness platforms. One example is One&Only Homes Hudson Valley, which has partnered with Clinique La Prairie to introduce advanced diagnostics and preventative healthcare programmes. Together, these examples suggest the sector is moving beyond traditional spa-led wellness towards more science-led approaches that support long-term health and wellbeing.

"The value of a home is increasingly measured by how it makes you feel and how well it helps you live. At Six Senses, it is not simply about where you live, but how you live. 'Live With Six Senses' brings this philosophy into everyday life, weaving wellness, sustainability and community into the design, service and daily rhythm of the home. Longevity is a natural extension of this approach: supporting our homeowners to live better, with greater vitality, balance, connection and purpose. Together, these elements express our brand promise to our homeowners: 'A Life Lived Well'."

Viri Kaur, Global Corporate Director of Residences for Six Senses Hotels Resorts Spas

[1] World Health Organization (2025), Ageing and health. Available at: World Health Organization (accessed October 2026).

Challenges and opportunities

As longevity emerges as the next evolution of wellness in branded residences, developers and operators face both significant opportunities and new complexities.

The global wellness real estate market has expanded significantly, growing from US$151 billion in 2017 to US$876 billion in 2025 and forecast to reach US$1.8 trillion by 2030 (Global Wellness Institute, 2026)[2], highlighting the scale of opportunity in health-focused real estate.

One of the most immediate challenges is cost. At a time when development costs are increasing across many markets, the incorporation of specialist wellness infrastructure, diagnostic facilities and enhanced building systems can have a material impact on the viability of a project.

Equally important is the cost to the resident. When purchasing a branded residence, service charges remain a key consideration, particularly in an environment where owners are increasingly sensitive to ongoing ownership costs. The delivery of longevity programmes requires healthcare practitioners, and specialist equipment which, where provided as part of a residential offering, can increase the operational costs. One solution may be to offer longevity services as an optional buy-in for residents.

Another key consideration is medical regulation. Whilst fitness facilities, spas and wellness programming are relatively straightforward to operate, longevity offerings often move closer to healthcare. Services such as diagnostics, biomarker testing and personalised health monitoring can introduce regulatory, legal and licensing considerations that vary significantly between jurisdictions. As a result, brands may find it more challenging to scale longevity initiatives globally in a consistent manner.

SAVILLS BRANDED RESIDENCES



FOUR SEASONS PRIVATE RESIDENCES WASHINGTON DC, USA

Long-Term lifestyle change

As longevity becomes more prominent across the hospitality and residential sectors, an important question emerges: can the benefits of longevity programmes be fully realised through short-term stays, or do the most meaningful outcomes depend on sustained engagement and long-term behavioural change?

Wellness experiences can undoubtedly inspire healthier habits, provide valuable health insights and introduce guests to new approaches to fitness, nutrition and recovery. However, longevity is fundamentally rooted in consistency. Its benefits are often linked to the cumulative impact of everyday behaviours, from exercise and sleep to nutrition and stress management.

This presents a unique opportunity for branded residences. Whilst retreats can act as a catalyst for change, residential environments provide the setting for those behaviours to become part of daily life.

Access to wellness facilities, preventative health services, fitness programming and personalised support within homes may help residents maintain healthier lifestyles over the long term.

Rather than competing propositions, hospitality and residential models may prove increasingly complementary. Longevity experiences as part of a retreat can serve as an entry point, introducing individuals to the concept, whilst branded residences provide the platform for ongoing engagement. As demand for healthier, longer lives continues to grow, the ability to support longevity as a lifestyle, not just an experience, will become a differentiator.

[2] Global Wellness Institute (2026), Wellness Real Estate Market Reaches $876 Billion – Forecast to Hit $1.8 Trillion by 2030, 12 May 2026. Available at: Global Wellness Institute (accessed October 2026).

Longevity also presents an opportunity for new brands and co-branding models to enter the sector. Historically, branded residences have been dominated by hospitality operators. However, the growth of wellness and longevity is opening the door to specialist brands such as Equinox, SHA Wellness, Clinique La Prairie and Chenot who are demonstrating how expertise in health and wellbeing can become a residential proposition in its own right. At the same time, there is increasing potential for partnerships between hospitality brands and specialist wellness or longevity operators. These co-branding models allow both brands to bring their unique areas of expertise; the hotel operator brings operational excellence and service whilst the wellness brand brings its distinctive knowledge of the increasingly complex longevity space.

Such partnerships may prove particularly important as longevity evolves beyond fitness and spa facilities towards more personalised and science-led solutions. In many ways, they represent a natural progression of the branded residence model, enabling developers to create a more differentiated residential offering while responding to growing consumer demand for health-focused living.

Ultimately, longevity offers the sector an opportunity to move beyond lifestyle-led amenities and towards a proposition centred on long-term health outcomes. However, its success will depend on whether developers can deliver genuine value rather than simply rebranding existing wellness concepts. The most successful projects are likely to be those that recognise longevity is not a weekend experience, but an ongoing lifestyle and the challenge will be determining how to bridge that gap.



WALDORF ASTORIA RESIDENCES, COSTA RICA

SIRO PORTO MONTENEGRO, MONTENEGRO

Closing Remarks



BY LOUIS KEIGHLEY

The key theme running through this year's report is ***diversification***, seen in all aspects of the branded residential sector's evolution.

As new brands, locations and development models enter the market, differentiation is becoming increasingly important. Without a clear and credible proposition, homogeneous supply could dilute the very value that *branding* is intended to create, leaving buyers with more choice but fewer meaningful points of distinction.

Yet diversification is also one of the sector's greatest opportunities. New brand entrants can introduce distinctive brand identities, broadening the appeal of branded residences to buyer groups beyond the reach of traditional hospitality brands. The arrival of wellness-led concepts alongside fashion and automotive brands is creating opportunities for more distinctive propositions built around specific interests, lifestyles and communities.

Looking forward, the evolution of branded residences into the rental market could democratise access to branded living and create a complementary commercial model built around recurring fees, sustained customer engagement and longer-term brand relationships, rather than value generated primarily at the point of sale.

The continued emergence of new growth markets presents an equally compelling opportunity. Brand premiums can be particularly strong where existing branded supply is limited and a new project establishes a benchmark for quality, service and value. However, first-mover advantage alone is not enough. A brand must have genuine relevance to the market and its target buyers, while its identity must be translated into a residential experience that responds to local expectations.

The next chapter will not be defined simply by more brands in more places. It will be shaped by whether this growth creates meaningful variety or avoidable dilution. Expansion creates the opportunity, but differentiation, market alignment and long-term operational performance will ultimately determine its value.

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