BRANDED RESIDENCES

2025/2026

FOREWORD

Branded residences continue to boom in 2025, 25 new countries, 39 new hotel brands, 19 new non-hotel brands.

2025 has been another resounding year for branded residences globally with the total number of schemes expected to rise from 764 (December 2024) to 910 by the end of 2025, reflecting a staggering year-on-year growth of 19%. What's more, the continuously strong pipeline of stock in recent years is not showing any signs of abating as there are more than 220 additional projects worldwide added to the development pipeline.

Whilst the growth momentum evidently continues to accelerate, the sector's ongoing maturity is bringing greater global stability across several key metrics, including the balance between hotel and non-hotel developments, resort and urban projects, and brand leaderboards. As the dataset expands and leading players refine the strategies that work best for their portfolios, the variance in these indicators continues to narrow year-by-year.

However, in the midst of stability lies the seed of change. The geographical spread of branded residences continues to expand, with the current pipeline spanning over 90 countries, 25 of which are launching their first ever branded residential development. The number of players active in the sector is also on the rise with 39 new hotel brands and 19 new non-hotel brands entering the residential space. Amidst this evolution, competition for developments and buyers remains intense, but our advice remains consistent.

To unlock the full potential of this booming market segment, developers must combine local market insight, disciplined buyer targeting, and strategic brand alignment. Sustained success will depend less on scale and more on thoughtful execution and expert advisory support.

This year's Savills Branded Residences report introduces a refreshed format, designed to suit every type of reader. It is divided into three clear sections:

- **Section 1:** Presents a concise, one-page factsheet designed for readers seeking a brief, data-driven overview of the sector.
- **Section 2:** A detailed analysis for those who want to explore market dynamics and the rationale behind the data.
- **Section 3:** An expert-led opinions piece, offering fresh perspectives, emerging trends, and thought-provoking insights drawn from recent industry conversations.

Collectively, these sections provide a comprehensive and nuanced understanding of the branded residences sector, supported by the industry's most extensive dataset, and informed by the expertise of Savills Global Residential Development Consultancy.

LOUIS KEIGHLEY

HEAD OF GLOBAL RESIDENTIAL DEVELOPMENT CONSULTANCY

COVER IMAGE: THE RESIDENCES AT MANDARIN ORIENTAL MIAMI, USA. ARTIST CONCEPTUAL RENDERING.

KEMPINSKI LAJE DE PEDRA CANELA, BRAZIL

SAVILLS BRANDED RESIDENCES

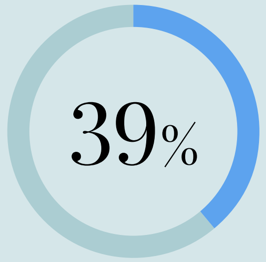
FACTSHEET

2025 BRANDED RESIDENCES AT A GLANCE

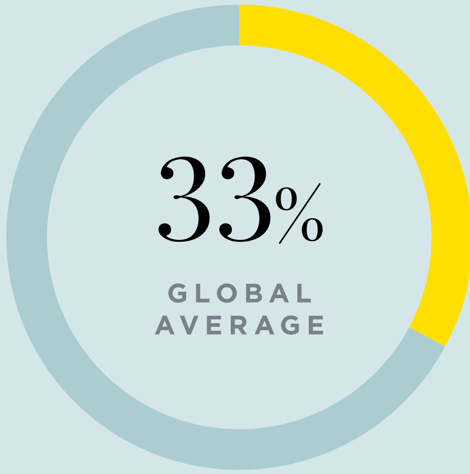
AVERAGE BRAND PREMIUMS

ESTABLISHED CITY AVERAGE

EMERGING CITY AVERAGE

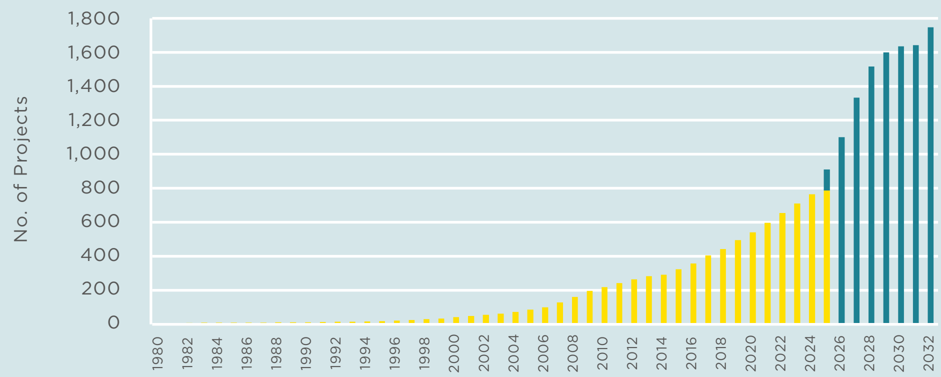


RESORT AVERAGE

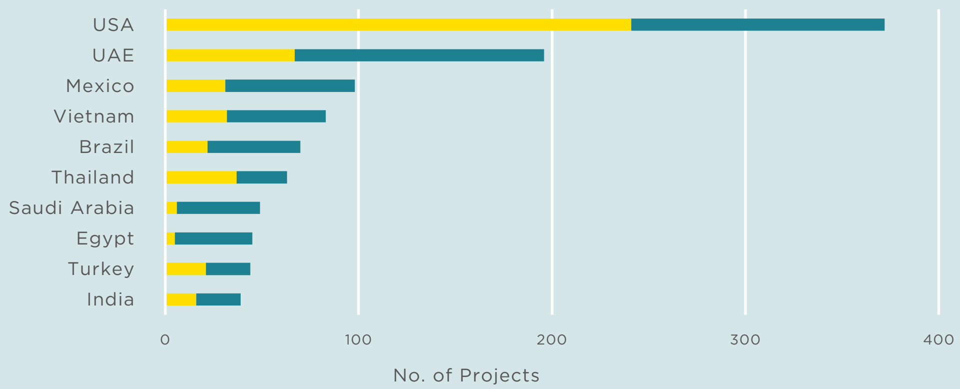


Completed   Pipeline

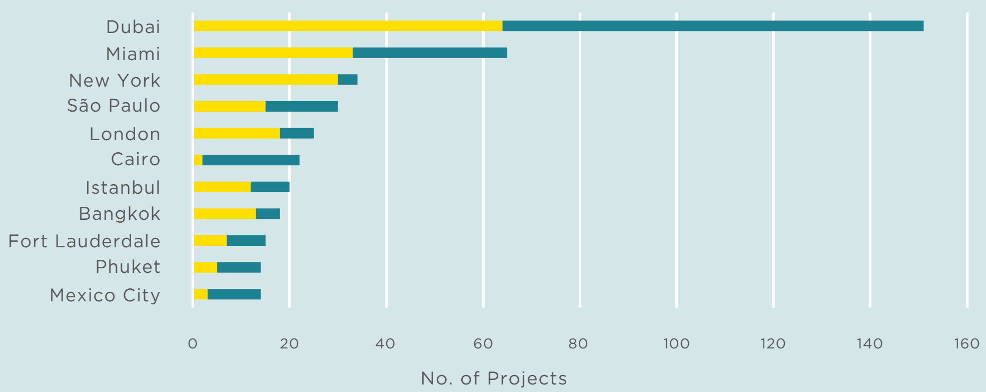
HISTORICAL EVOLUTION



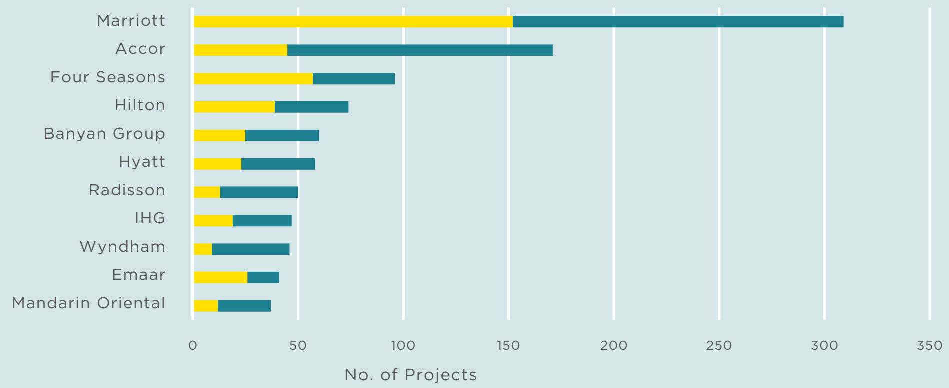
TOP 10 COUNTRIES



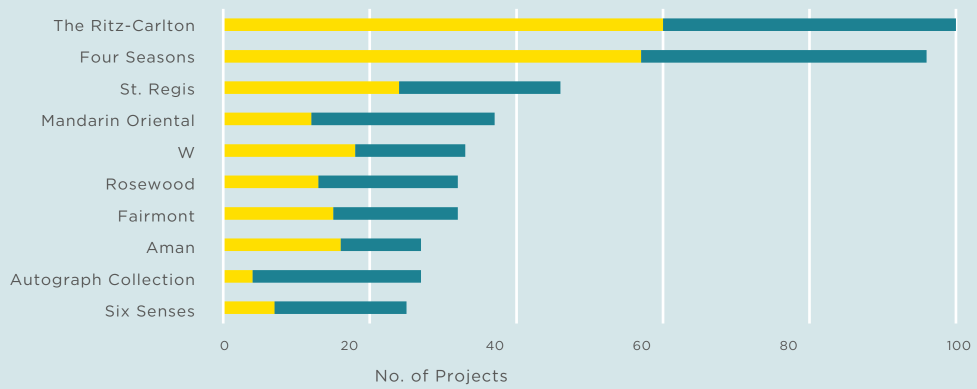
TOP 10 CITIES



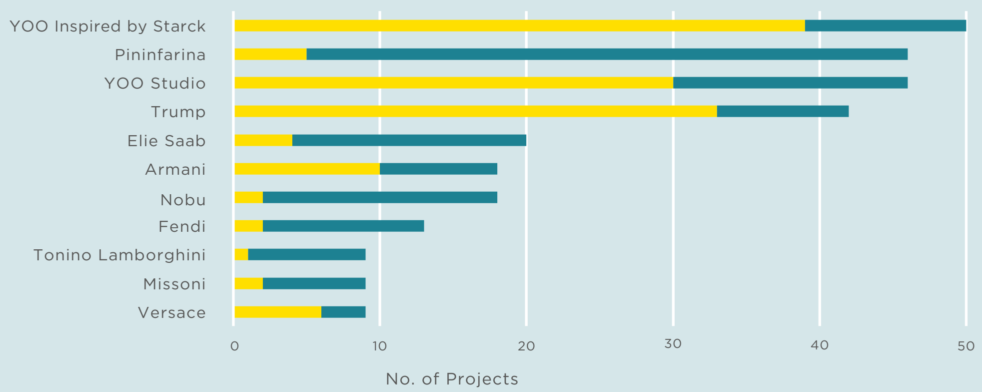
PARENT GROUP LEADERBOARD



HOTEL BRAND LEADERBOARD



NON-HOTEL BRAND LEADERBOARD



Source: Savills Global Residential Development Consultancy

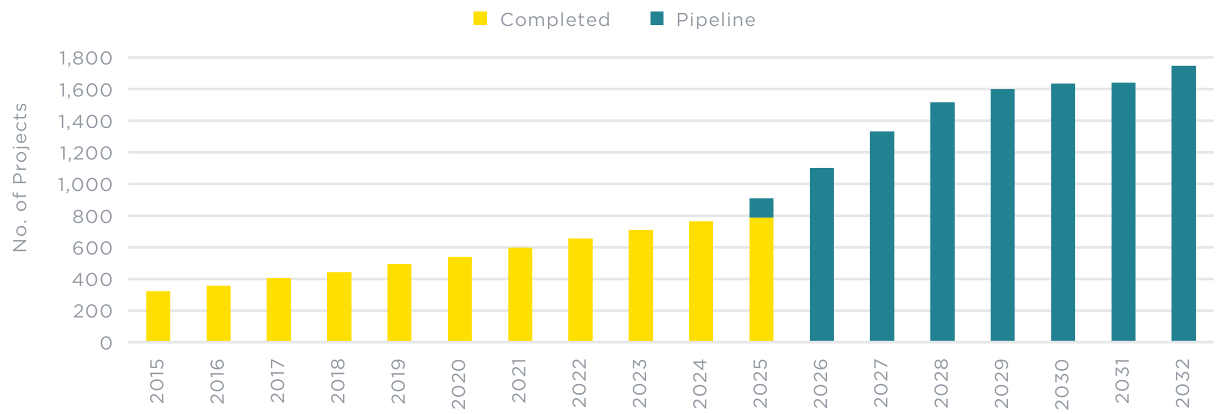
MARKET OVERVIEW 2025

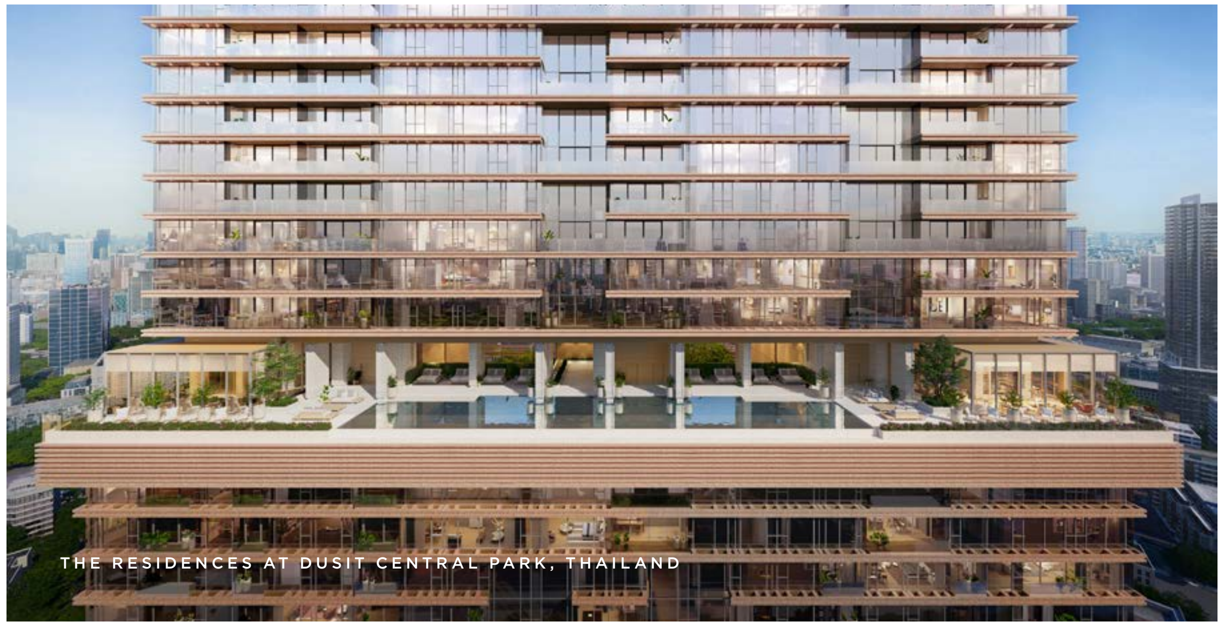
Historical Growth

In 2015, there were just 323 branded residential developments worldwide. By the end of 2025, this will have almost tripled to 910 (assuming all remaining 2025 pipeline projects complete). This expansion represents a compound annual growth rate of 10.9% in the 10-year period, almost doubling that of both the global hospitality and real estate markets over the same time period.

The momentum shows little sign of slowing. Based on schemes already signed, a further 837 projects are scheduled to come to market by 2032, taking the total to 1,747 branded residences. Crucially, this is not a forward projection but a list of contracted projects, underlining the depth of developer appetite, the ongoing commitment from the brands and the enduring strength of the branded residence model.

HISTORICAL EVOLUTION SINCE 2015




THE RESIDENCES AT DUSIT CENTRAL PARK, THAILAND

SAVILLS BRANDED RESIDENCES

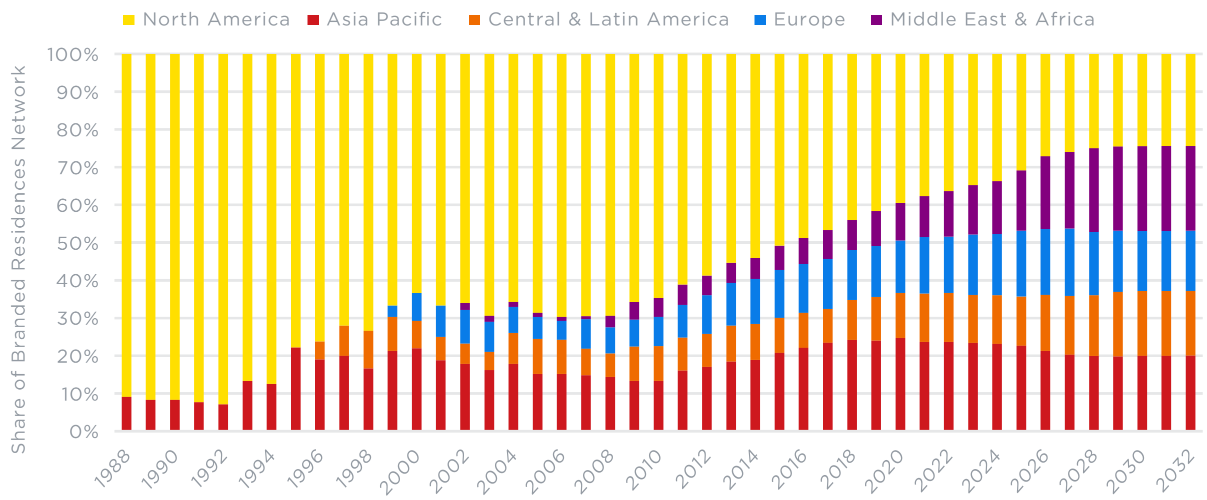

RESIDENCES AT THE SURREY, A CORINTHIA HOTEL, USA

Regional Diversity

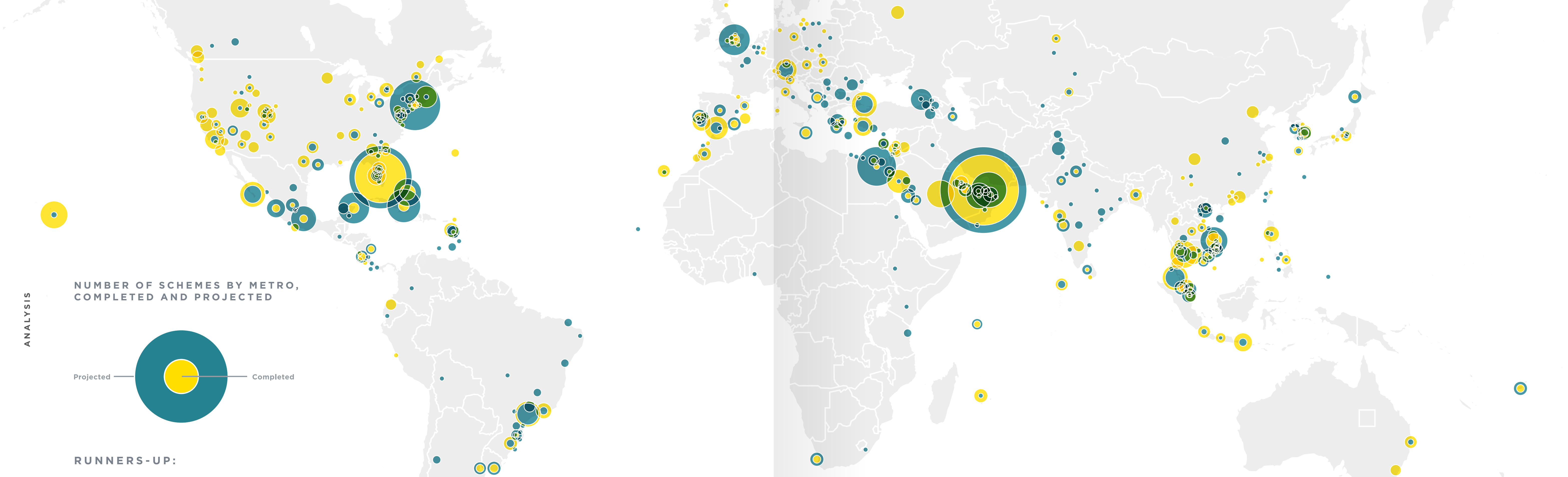
While North America was the birthplace of branded residences and remained the dominant region until the mid-2010s, its share of global supply has steadily declined as new markets have emerged. In the last five years, Asia Pacific has rapidly risen (+55%), fuelled by particularly strong pipelines in Vietnam, Thailand and India. The Middle East & North Africa region has seen even faster growth (+187%), led by Dubai and the wider Gulf, now rivalling more mature regions in scale.

The rest of Africa, though still small in scale, has begun to register on the global map with 10 completed schemes across the region by 2026. Europe and Central & Latin America have also expanded, with both resort and city schemes, and now have over 50 new branded developments in the last year between them. The result will be a more balanced distribution of branded residences worldwide, with no single region holding more than a quarter of the market by 2032.

GEOGRAPHICAL EVOLUTION



GLOBAL
DISTRIBUTION



NUMBER OF SCHEMES BY METRO, COMPLETED AND PROJECTED

SAVILLS BRANDED RESIDENCES

TOP 3:

1. DUBAI	2. SOUTH FLORIDA	3. NEW YORK
COMPLETED: 64 | PIPELINE: 87	COMPLETED: 48 | PIPELINE: 55	COMPLETED: 32 | PIPELINE: 4

RUNNERS-UP:

4. SÃO PAULO	5. CAIRO	6. RIVIERA MAYA	7. PHUKET	8. LONDON	9. RAS AL KHAIMAH	10. LOS CABOS
COMPLETED: 15 | PIPELINE: 15	COMPLETED: 2 | PIPELINE: 26	COMPLETED: 7 | PIPELINE: 20	COMPLETED: 15 | PIPELINE: 11	COMPLETED: 18 | PIPELINE: 7	COMPLETED: 0 | PIPELINE: 24	COMPLETED: 13 | PIPELINE: 9

Across the world, a select group of locations consistently attract High and Ultra-High Net Worth Individuals (HNWI & UHNWIs) and therefore, Branded Residences. Whilst each of these destinations have their own appeal and character, we repeatedly find three common themes that unite them: international connectivity, capital security and lifestyle infrastructure.

At the heart of these markets lies a remarkable consistency in the factors that draw and retain global wealth. Connectivity is perhaps the most obvious: HNWIs are highly mobile, and the ease with which they can move between homes, offices and leisure destinations is critical. Urban hotspots such as Dubai, London, New York, and South Florida (predominately made up of Miami and Fort Lauderdale) function as true global gateways, supported by expansive flight networks and private aviation facilities. Resort-led destinations, from Phuket to Los Cabos, benefit from strong feeder links, whether by air, land or sea, ensuring accessibility is never compromised.

Tax positioning and capital security remain equally central to these purchasers' decision-making. Dubai has built its reputation on fiscal efficiency, offering a highly attractive tax environment. Miami and Fort Lauderdale, whilst operating within the US framework, benefit from Florida's no-state-income-tax status which is a huge draw (amongst others), especially for those coming from high-tax states or countries. London and New York, by contrast, are not tax havens but continue to act as safe harbours for capital, their liquidity and legal systems underpinning long-term confidence.

In emerging markets such as Cairo, Istanbul, and Mexico City, relatively low entry costs and the opportunity to diversify across currencies provide an additional layer of attraction for regional investors.

Finally, the defining characteristic across all these markets is their ability to deliver a lifestyle proposition that matches global expectation. Waterfront living and yachting are integral in Miami, Dubai, and Phuket, blending leisure with investment. The cultural pull of New York, London and Mexico City remains unmatched, offering world-class art, dining, and performance. Wellness and hospitality are now key differentiators in Bangkok, Riviera Maya, and Ras Al Khaimah, where medical tourism and spa-led resorts set global standards. Sport too plays its role, with golf and other recreational amenities.

HOTEL BRANDED RESIDENCES BY PARENT GROUP

The branded residential and hospitality sectors remain intrinsically linked but highly diverse, however, a clear hierarchy of scale is emerging. At the top end, Marriott and Accor dominate with pipelines in the hundreds, their strength derived from multi-brand portfolios (both offering in excess of 35 brands) that transcend into every tier of the market. Beyond these two global powerhouses, Four Seasons retains a disproportionate influence relative to its size, as the only singular brand in the top 10, with its closest rival being Mandarin Oriental in 11th place.

Looking at other operators at the top, Hilton, Hyatt, IHG, Radisson and Wyndham form a strong second tier of parent groups, each balancing volume with diversification across a plethora of brands.

Beyond these global operators lies a more selective group of luxury and lifestyle specialists. Banyan Group, Mandarin Oriental and Rosewood remain key players, with brand equity and service reputation ensuring their high-end positioning. Similarly, Aman, Auberge, Montage and Kerzner exemplify the ultra-luxury segment, where scarcity and exclusivity are strategic strengths rather than limitations.

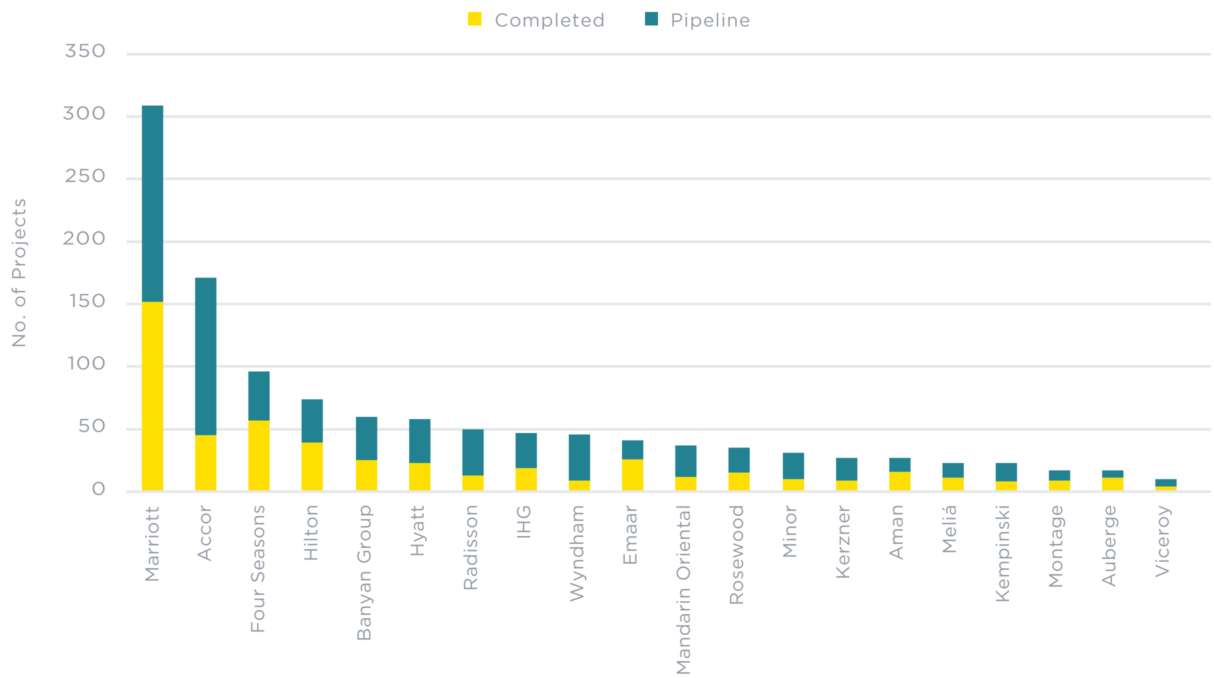
THE ST REGIS RESIDENCES HOUSTON, USA

ROSEWOOD RESIDENCES DUBAI, UAE

At the long tail, we see an increasingly eclectic mix of regional players and niche lifestyle brands: from Emaar and Jumeirah, anchoring Dubai's homegrown presence, to Nikki Beach, Faena and Cipriani, capitalising on lifestyle and entertainment-led positioning. Boutique operators such as Soneva, COMO and Lefay add further texture, highlighting the growing importance of wellness, sustainability and experiential travel in shaping future demand.

Together, the data underlines two concurrent dynamics: the scale advantage of global giants in driving distribution and visibility, and the enduring value of brand identity and idiosyncrasy in securing premium, high-margin projects.

HOTEL PARENT GROUPS



SAVILLS BRANDED RESIDENCES

2025 HOTEL BRANDS LEADERBOARD

After twenty-five years, the contest at the top remains fierce among familiar rivals, while a new cohort begins its ascent.

		2000	2005	2010	2015	2020	2025	2030	
HOTEL BRANDS	1	FOUR SEASONS	— FOUR SEASONS	▲ THE RITZ-CARLTON	— THE RITZ-CARLTON	▲ FOUR SEASONS	— FOUR SEASONS	▲ THE RITZ-CARLTON	1
	2	AQUA-ASTON	▲ THE RITZ-CARLTON	▼ FOUR SEASONS	— FOUR SEASONS	▼ THE RITZ-CARLTON	— THE RITZ-CARLTON	▼ FOUR SEASONS	2
	3	AMAN	▼ AQUA-ASTON	▲ WESTIN	▲ W	— W	▲ ST REGIS	— ST REGIS	3
	4	ROSEWOOD	▼ AMAN	▲ W	▲ ST REGIS	— ST REGIS	▼ W	— W	4
	5	THE RITZ-CARLTON	▼ ROSEWOOD	▲ ST REGIS	▼ WESTIN	▲ AMAN	— AMAN	▲ ROSEWOOD	5
	6	WESTIN	▲ DOUBLETREE	▲ HILTON	▲ ROSEWOOD	▲ BANYAN TREE	▲ FAIRMONT	— FAIRMONT	6
	7	DOUBLETREE	▼ WESTIN	▲ FAIRMONT	▲ BANYAN TREE	▲ WESTIN	▲ ADDRESS	▲ MANDARIN ORIENTAL	7
	8	-	▲ ST REGIS	▼ AQUA-ASTON	▼ FAIRMONT	▲ FAIRMONT	▲ WALDORF ASTORIA	▼ AMAN	8
	9	-	▲ FAIRMONT	▼ AMAN	— AMAN	▼ ROSEWOOD	▲ MANDARIN ORIENTAL	▲ AUTOGRAPH	9
	10	-	▲ KEMPINSKI	▲ BANYAN TREE	▼ HILTON	▲ WALDORF ASTORIA	▼ WESTIN	▼ WALDORF ASTORIA	10
NON-HOTEL BRANDS	1	TRUMP	— TRUMP	— TRUMP	— TRUMP	▲ YOO INSPIRED BY STARCK	— YOO INSPIRED BY STARCK	— YOO INSPIRED BY STARCK	1
	2	-	▲ YOO INSPIRED BY STARCK	— YOO INSPIRED BY STARCK	— YOO INSPIRED BY STARCK	▼ TRUMP	— TRUMP	▲ PININFARINA	2
	3	-	▲ GREG NORMAN	— GREG NORMAN	— GREG NORMAN	▲ YOO STUDIO	— YOO STUDIO	— YOO STUDIO	3
	4	-	-	▲ JADE JAGGER FOR YOO	▲ YOO STUDIO	▼ GREG NORMAN	▲ PININFARINA	▼ TRUMP	4
	5	-	-	-	▲ VERSACE	— VERSACE	▲ ARMANI	▲ ELIE SAAB	5
	6	-	-	-	▼ JADE JAGGER FOR YOO	▲ ARMANI	▲ ELIE SAAB	▼ ARMANI	6
	7	-	-	-	▲ PININFARINA	— PININFARINA	▼ GREG NORMAN	▲ NOBU	7
	8	-	-	-	-	▼ JADE JAGGER FOR YOO	▲ NOBU	▲ FENDI	8
	9	-	-	-	-	▲ KELLY HOPEN FOR YOO	▼ VERSACE	▼ GREG NORMAN	9
	10	-	-	-	-	▲ FASHION TV	▲ ROBERTO CAVLLI	▲ MISSONI	10

■ NEW ENTRANT

It has been five years since Savills last analysed this trend, so it seems timely to illustrate the evolution of the top 10 global brands (hotel and non-hotel), over the past quarter of a century. What becomes acutely apparent from such a study is the sheer lack of volume of branded residential stock back in 2000, both across the hotel and non-hotel brands, which underscores the nascency of the sector.

Back in 2000, top of the leaderboard was Four Seasons and Aqua Aston, each with six completed schemes. Unlike Aqua-Aston however, Four Seasons would continue to bolster its branded residential offering and remain in the top two hotel brands from that point onwards. The Ritz-Carlton only becomes a true contender for the top spot from 2005 onwards, growing its offering from just two projects in 2000 to 11 by 2005, and significantly increasing its offering year-on-year thereafter. Fairmont, St Regis and Rosewood are consistent names on the leaderboard, as we see these frontrunners pull away as the sector matures. Looking five years from now, we continue to see a few consistent names but welcome the re-emergence of both Rosewood and Waldorf Astoria, as well as a new contender from the Marriott umbrella, Autograph Collection.

Whilst the hotel brands may govern the sector by sheer scale, the non-hotel leaderboard is determined by a brand's ability to translate their identity into built form. In 2000, Trump was the only non-hotel brand to offer more than one completed project, with five developments in total. By 2005, Trump had more than doubled its offering (11 completed schemes), leading the non-hotel space until 2020 when YOO took the crown and has remained top ever since. Greg Norman, with its golf-orientated projects, featured in the top three between 2010 and 2020, before allowing other non-hotel brands to slowly climb the ranks and overtake them.

Pininfarina, one of these climbers, had only two completed schemes in 2015 but, in 2025, is the second-highest provider of non-hotel branded stock, with a significant development pipeline across South America. Looking at the current provision for 2030, Elie Saab demonstrates the second-highest pipeline (between now and 2030) of non-hotel brands, with several developments across the MENA region. New entrants, Fendi, Missoni and Versace, are also expected to enter the top 10 for the first time. Needless to say, for these brands, unlike the more established hotel brands, even a single scheme can create global headlines.

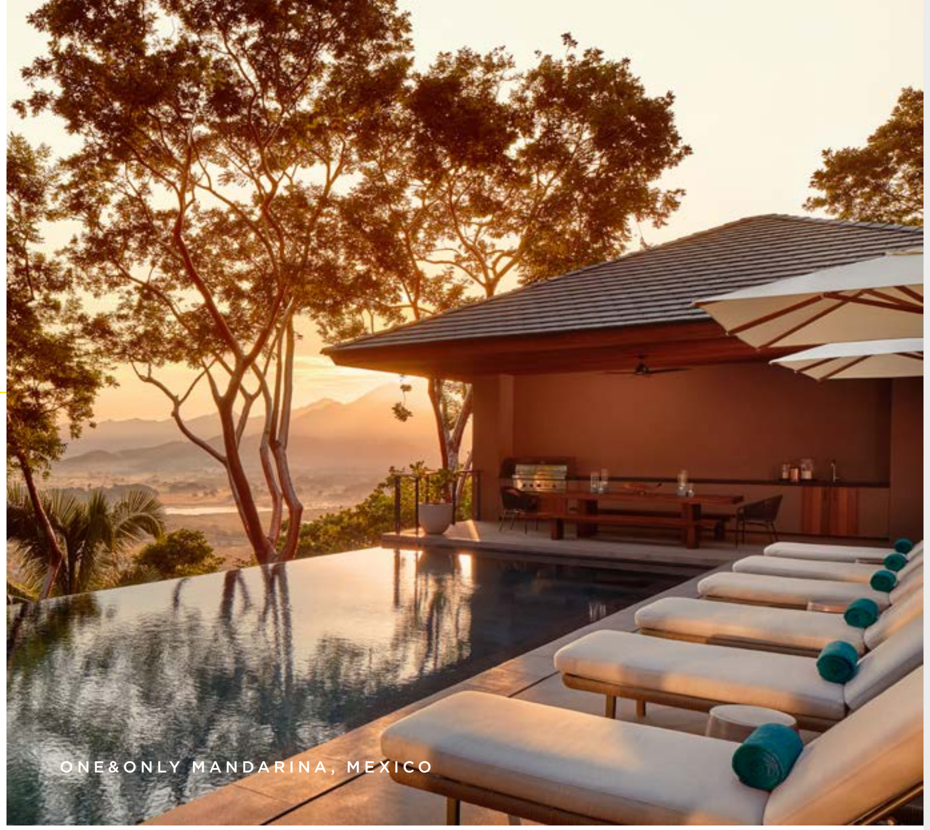
STRUCTURAL TRENDS

Hotel brands continue to dominate delivery, both in completed stock and in the future pipeline. Non-hotel brands, meanwhile, appear to be consolidating their position, maintaining a steady and slowly growing share of the overall industry.

Hotel brand chainscale classification remains heavily weighted towards the upper tiers. Completed projects are overwhelmingly positioned in the luxury and upper-upscale categories, a trend that undoubtedly carries through into the pipeline. While there is a modest rise in midscale and upscale pipeline schemes, the exclusive positioning of branded residences as a product class remains firmly intact.

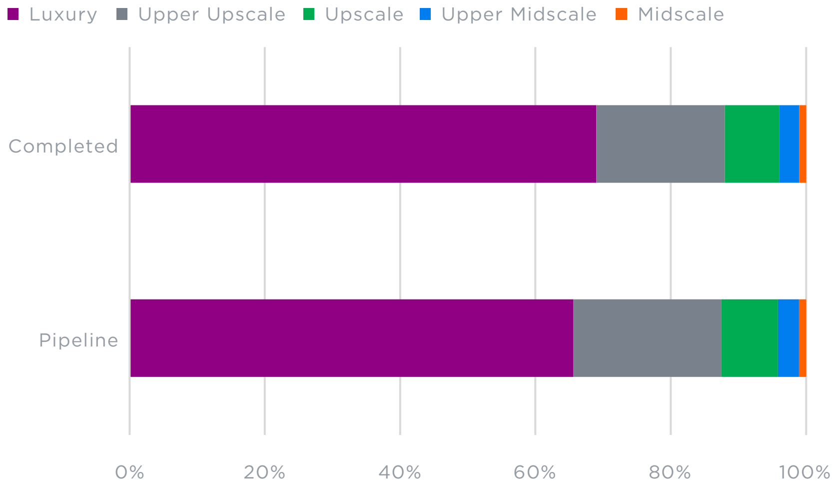
In terms of non-hotel-brand classification, design names continue to lead the way, with their existing brand offering translating most seamlessly into branded residential products. Looking to other non-hotel sectors, Fashion, F&B and Automotive labels are seeing the most future growth, indicating the sought-after lifestyle and emotional association of these brands. The pipeline is also far more diverse, with three new categories (Media & Publishing, Music and Art) entering the sector, demonstrating its evolution.

When viewed through the lens of 'urban versus resort' locations, the balance is very slightly tilted towards urban projects in the completed stock (although, interestingly, this is not the case in The Americas or MENA regions). However, resorts show a notably stronger pipeline, across all regions particularly in APAC.

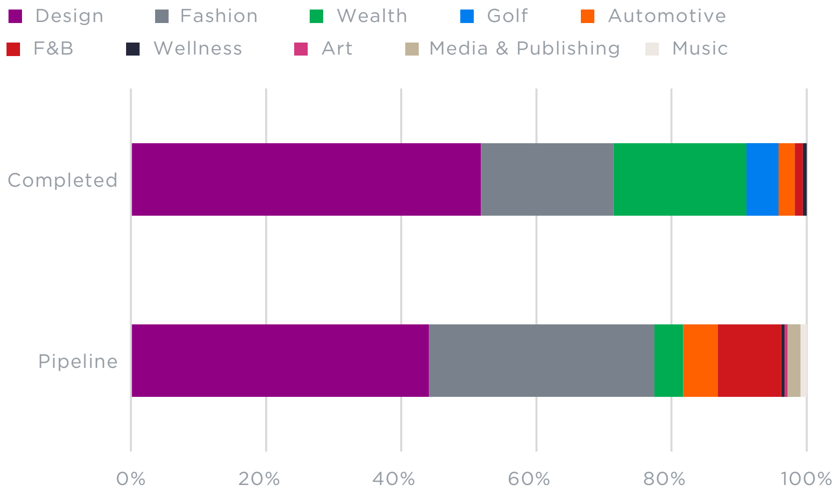


ONE&ONLY MANDARINA, MEXICO

HOTEL BRAND CHAINSCALES

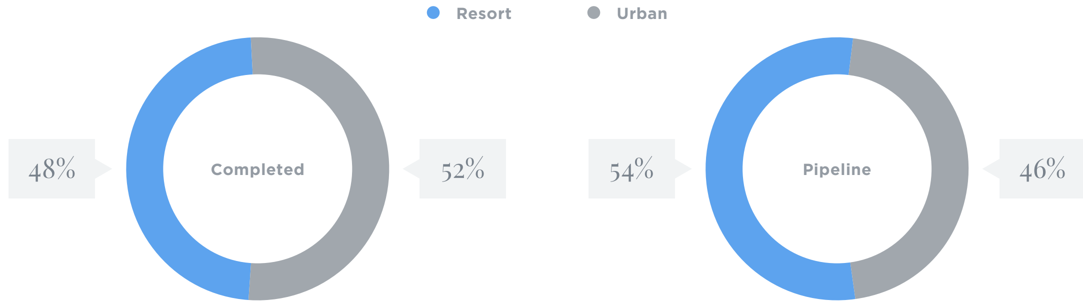


NON-HOTEL BRAND CLASSIFICATIONS

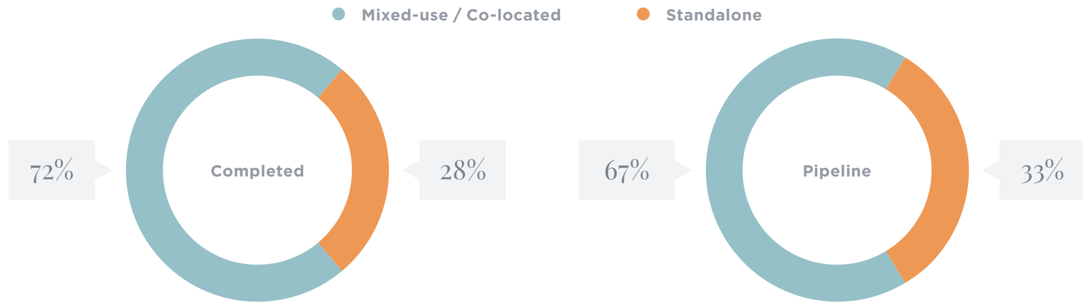


This underlines their continued importance as a growth segment and highlights the sought-after lifestyle associated with resorts. Development type further reinforces this evolution. Completed schemes are predominantly mixed-use, yet the pipeline highlights a growing share of standalone products, reflecting the increasing integration of branded living into hotel operators' business strategies. As the sector matures, hotel operators do not necessarily require a hotel as an anchor point for their residences. Particularly in urban centres, where they may already have a hotel, standalone residences are an increasingly appealing product type and are used to diversify revenue streams.

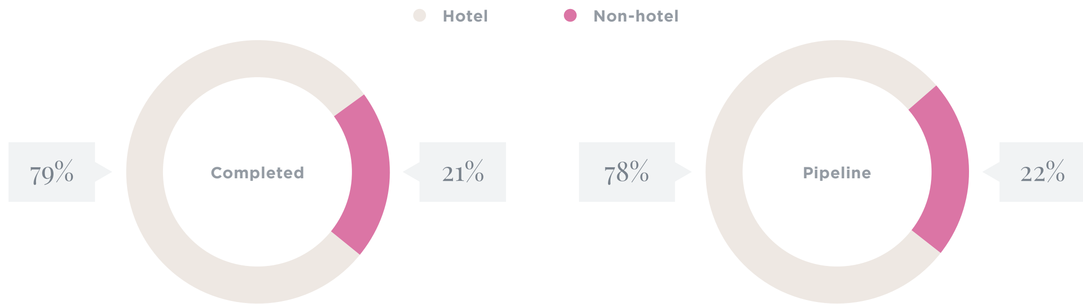
LOCATION TYPE



DEVELOPMENT TYPE



CLASSIFICATION TYPE



Source: Savills Global Residential Development Consultancy

SAVILLS 2025 GLOBAL BRAND PREMIUM STUDY

63% more brands premiums analysed. The global average holds firm. Resorts are on the rise!

ANALYSIS

The Savills 2025 Global Brand Premium Study represents our most extensive analysis to date. We have revised, refined and extended both our market definitions and methodologies to provide greater clarity on premiums within each market segment.

- **'Established Cities'** are classified as those with 15 or more completed branded residential schemes.
- **'Emerging Cities'** are those hosting between three and 14 completed projects.
- **'New Cities'** are characterised by those offering fewer than three schemes and will feature in next year's report.

The findings show that the Global Average Premium, defined by Savills, remains consistent with last year's average at 33%, reinforcing the resilience of the branded residential model. Within urban environments, both Established Cities and Emerging Cities command an average premium of 30%, whilst resort destinations, where lifestyle often drives additional value over less sophisticated local markets, achieve the highest premiums, averaging 39% (up from 34% in 2024).

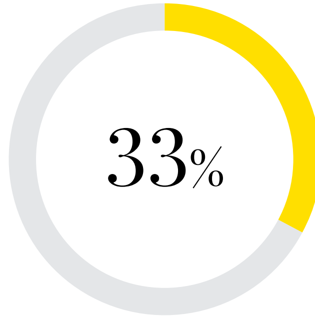
SOFITEL RESIDENCES MADERO, ARGENTINA

Averages, however, do not tell the full story. Established Cities, with entrenched demand and mature markets, display the lowest variation in premiums (with a standard deviation of just 0.32). Resorts follow closely, benefiting from strong international demand and a clear alignment between brand and lifestyle offering. By contrast, Emerging Cities exhibit the widest range of outcomes with a variance that is 57% higher than for Established Cities. Here, a well-executed scheme can achieve exceptional premiums, well above the market baseline, but conversely, weaker projects can easily underperform local comparables.

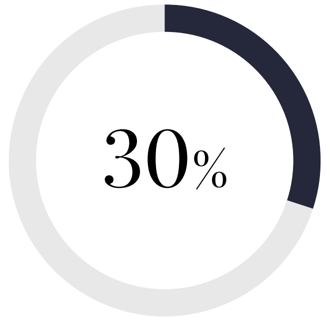
The data underlines a critical message: brand alone is not enough. While the global average premium remains steady, delivery quality, location and operational execution remain decisive in determining success.

BRAND PREMIUMS

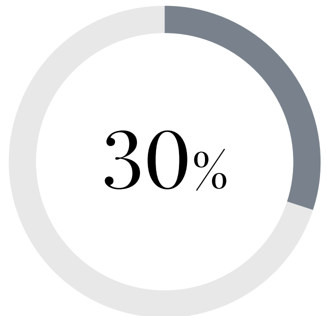
GLOBAL AVERAGE PREMIUM



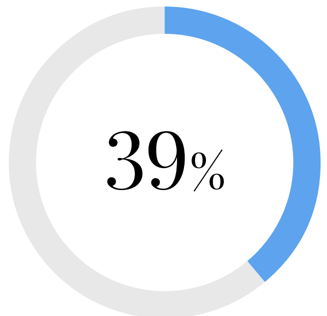
ESTABLISHED CITY AVERAGE PREMIUM



EMERGING CITY AVERAGE PREMIUM



RESORT AVERAGE PREMIUM



SAVILLS BRANDED RESIDENCES

OPPORTUNITY *AWAITS*

AUTHOR: JACQUES SHARAM

THE MAYBOURNE SAINT-GERMAIN, FRANCE

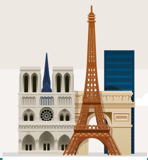
From global gateway cities to coveted coastal resorts, what future favourites have been overlooked?

Within the branded residential space, nearly 1,000 projects have been delivered. These developments range from beachfront schemes, where residents can wake up, order coffee via room service and step into crystal-clear turquoise waters, to vast high-rise penthouses, with sweeping skyline views that provide a serene escape from the city below.

Such projects have achieved significant success in city markets including Dubai, Miami, London, and New York, as well as in coastal destinations such as Phuket, Comporta and Los Cabos. Yet there remain some conspicuous absentees, locations that people aspire not only to visit but also to live in. We will explore a few of these destinations, places that demonstrate the potential to be the next "hotspots" for branded residential development.

OPINION

PARIS



MARKET STATUS: COMPLETED: 0 | PIPELINE: 2

Perhaps one of the most noticeable absentees from the city leaderboards is Paris. The French capital welcomes around 50 million tourists annually and is one of the most populous cities in Europe. Its cultural credentials are endless: architectural marvels, iconic artworks, culinary excellence and pioneering fashion. Paris is arguably the 'chicest' city of all, evoking the feeling of stepping into a noir-et-blanc film. So why are there so few branded residential projects here?

The answer lies in heritage that is both celebrated and carefully preserved. Unlike London, which has evolved into a patchwork of styles through organic growth and post-war reconstruction, Paris retains an extraordinary degree of visual harmony. Its Haussmann boulevards and façades are rightly safeguarded by strict planning laws, making opportunities to introduce new branded residences exceptionally rare.

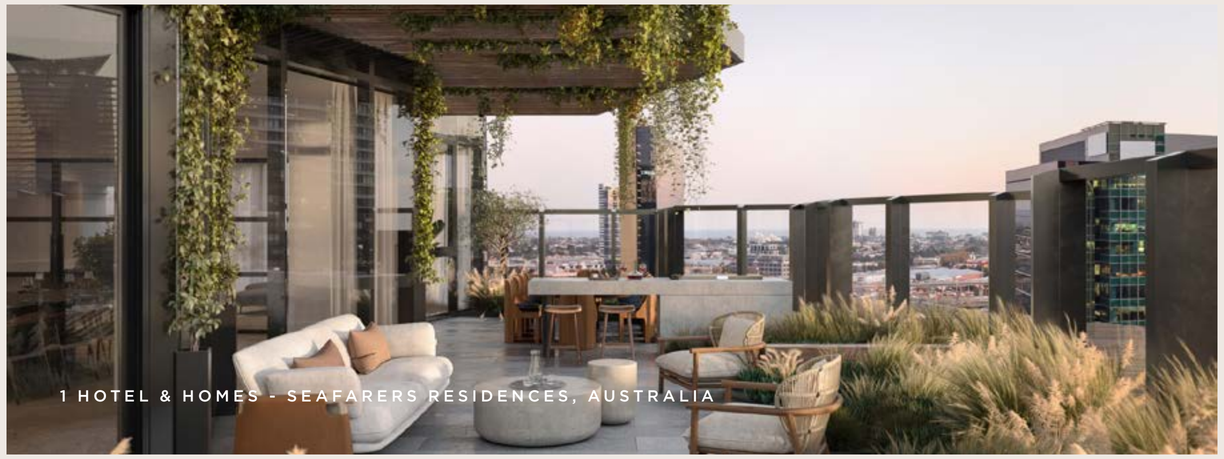
Beyond architectural preservation, developers face a series of practical and legislative hurdles. Finding a building with sufficient scale to accommodate both a five-star hotel and private residences is notoriously difficult. Where such opportunities do arise, change of use can be complex and costly, while rental caps in certain districts may limit the potential for attractive yields. Paris also imposes restrictions on short-term lets, and the large number of long-term renters are protected by stringent tenancy laws, making evictions a lengthy and challenging process.

Even within the branded residential sector, regulatory nuances persist. Residences offering more than four hotel-style services cannot be registered as purely residential and may instead fall under para-hôtellerie classification, bringing additional tax and operational implications. Collectively, these factors have created one of the most tightly regulated and supply-constrained markets in the world.

Far from being a deterrent, however, these very challenges make Paris one of the most prestigious and aspirational markets for branded residential developers. Success here is not simply about delivering a project, but about contributing to the city's enduring legacy. A small number of landmark schemes are now emerging, including the Maybourne St. Germain Hotel and Residences.

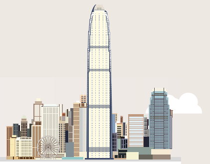
Charlie Walsh, Global Head of Residential Sales at Maybourne, comments:

"Maybourne's arrival in the City of Light presents an unmatched lifestyle and investment opportunity, a storied building in one of Paris's most sought-after locations, with ultra-luxury hotel amenities and services on the doorstep. The Parisian market is notoriously constrained, with very few prime sites offering the scale required to deliver a new 101-key five-star hotel. The ability to pair this with 23 exceptional residences is exceedingly rare. It is for this reason that the first phase has nearly sold out, with the final phase launching soon." As Audrey Hepburn famously remarked, "Paris is always a good idea."



1 HOTEL & HOMES - SEAFARERS RESIDENCES, AUSTRALIA

HONG KONG



MARKET STATUS: COMPLETED: 4 | PIPELINE: 0

A blend of East and West, Hong Kong is a city of extremes, a place where glass towers rise from the harbour in dazzling profusion and some of the world's highest concentrations of wealth are packed into a few square kilometres. Yet, for all its glamour, Hong Kong has only four branded residential projects, three of them by YOO, and not a single scheme in the pipeline.

The reasons lie in the city's unique urban and regulatory framework. Land is scarce and tightly controlled by the government, released only under long-term leases. Competition for plots is fierce, and prices already rank among the highest globally, perhaps reducing the incentive for developers to pursue the added complexity of the branded model. The planning system and strata-title structure also present hurdles, complicating the delivery of services and amenities that define branded living.

Like Paris, because of these constraints, Hong Kong offers one of the most compelling opportunities for branded residences. In a market where luxury is already the norm, the branded model has the potential to distinguish projects through service innovation, international recognition and lifestyle integration, in ways that conventional developments cannot.

For a developer bold enough to navigate the complexities, a successful scheme here would not only stand apart in Hong Kong's skyline but also set a new benchmark for branded living in one of the world's most competitive real estate environments.

SYDNEY

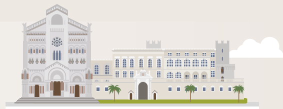
MARKET STATUS: COMPLETED: 3 | PIPELINE: 0

Sydney is a city that sells a dream: golden beaches, an iconic harbour crowned by the Opera House and a lifestyle that consistently ranks among the most desirable in the world. It is also home to three branded residential schemes, one of which set a record price (albeit one that was quickly eclipsed) for its penthouse on launch. For all Sydney's global appeal, branded residences remain a niche segment of its high-end market.

The explanation for this lies in the strength of Sydney's prime residential sector. Apartments overlooking the harbour and city skyline already achieve extraordinary values without the added pull of an international brand. Strict planning controls and a deep domestic buyer base mean developers historically have had little incentive to embrace the branded model. At the same time, the city's luxury market has been dominated by local players, leaving limited space for global operators.

This dynamic presents an opportunity. With pricing already setting record after record, the branded model can serve as a genuine differentiator, offering a level of lifestyle service and international cachet that local schemes, however luxurious, cannot replicate. A bold new project would not only capture global attention but also position Sydney as a stage where branded residences can push the boundaries of what luxury urban living in Australia looks like.

MONACO



MARKET STATUS: COMPLETED: 0 | PIPELINE: 0

Few places capture the imagination of the wealthy quite like Monaco and the Côte d'Azur. From the yachts in Port Hercule to the villas of Cap Ferrat and Cannes, this stretch of coastline has long been shorthand for glamour, heritage and exclusivity. It is home to some of the most expensive real estate in the world, attracting a cosmopolitan buyer base seeking prestige and privacy. Yet, despite this, the region has no branded schemes.

The reasons lie in scale and regulation. Monaco covers little more than two square kilometres, with plots rarely available and pricing already at eye-watering levels. Along the Riviera, like Paris, the challenge is not a lack of demand but legislative restrictions and the availability of prime sites. The combined strength of the unbranded luxury market and the limited availability of land have prevented branded residences from taking hold.

That said, in destinations where luxury is already assumed, the branded model could create a new dimension of value, introducing international service standards, curated lifestyle programming and the assurance of a globally recognised name. The first developer to succeed here would not only deliver another trophy project, but would write a new chapter in the Mediterranean's story, one where branded living takes its place alongside the yachts, villas and glitzy prestige.

SUMMARY

Branded residences have spread rapidly across many of the world's major cities and resorts, yet some of the most prestigious destinations remain untouched and underserved. Paris has been constrained by the availability of sites, Hong Kong by land policy and market dynamics, Sydney by a prime sector that has thrived without brands, and Monaco and the Côte d'Azur by scarcity of supply and regulatory hurdles. In each case, the lack of branded product does not signal a lack of demand but rather structural barriers. Perversely, these very constraints heighten the opportunity: in markets where luxury is already assumed, a successful branded residence not only stands apart but could redefine the entire ultra-luxury market.

W RESIDENCES AL MARJAN ISLAND, UAE

NOBU MANCHESTER, UK

OPINION

THE "TWO-HOUR HOME"

AUTHOR: WILLIAM HUDSON

The perfect balance between urban professional life and peaceful rural existence.

Standalone, co-located? Hotel brand, non-hotel brand? Urban, resort? Understanding what works, where works and why it works can mitigate development risks and help create a successful branded residential project.

Savills GRDC can help discover where developers and brands should be looking to implement their next project using market data and evidence.

The Lakes by YOO in the Cotswolds is a standalone model and has operated successfully since its inception in 2007. Alongside the co-located Hamilton Grand in St Andrews, it is one of only two operating branded residences in the UK outside of London. But, with Nobu Residences and W Residences now in the Manchester pipeline, branded residences are no longer a London-centric phenomenon.

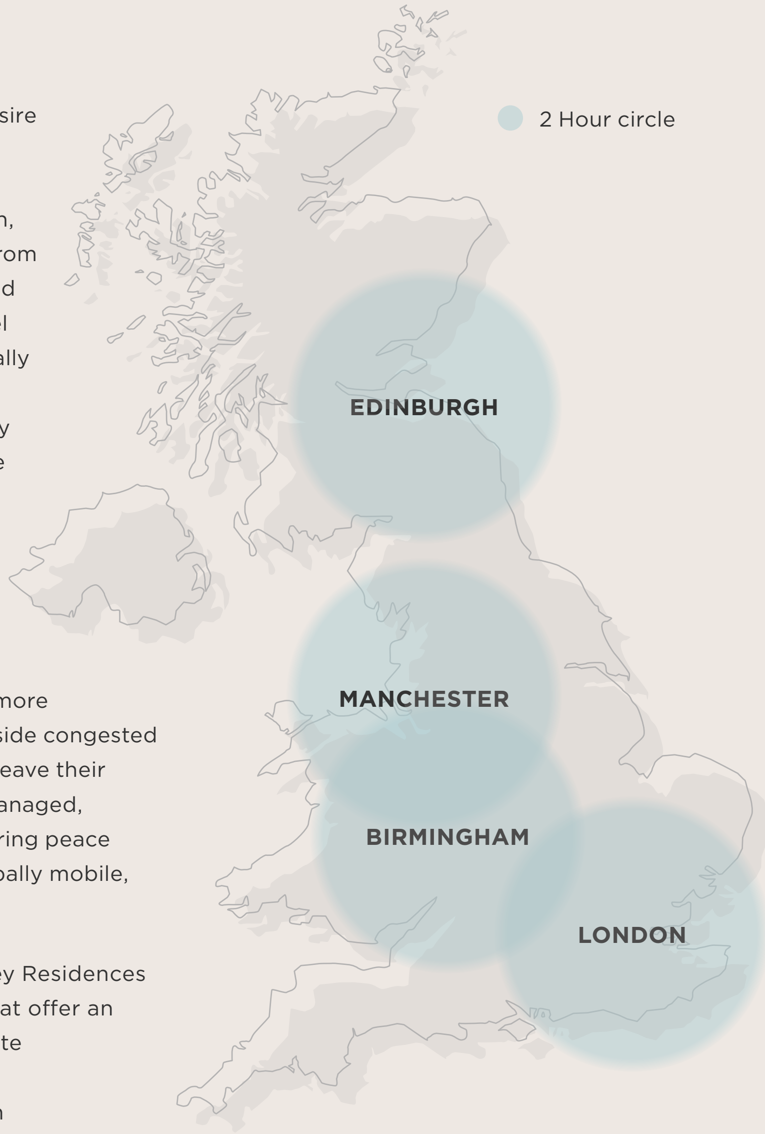
Birmingham and Bristol also have potential as urban destinations for future branded developments, as developers look for stronger returns outside London. And with DAMAC releasing the Chelsea Residences in Dubai, could we possibly see it coming home to a Premier League team like Liverpool or Brighton?

We believe there could be a resurgence of the 'Two-hour Home', but this time with a branded twist. This is not a new concept, as people have long owned country and city homes in tandem… but is there now an opportunity for the branded sector to get involved? GRDC has already worked on Les Bordes which houses The Six Senses Loire Valley Residences, two hours from Paris, and more recently on projects near Lisbon, Madrid and around the UK.

The 'Two-hour Home' concept is driven by the desire for a balance between urban professional life and a peaceful rural existence, all within two hours of an urban hub. It is primarily defined by its location, convenience, and frequency of use. It is distinct from holiday homes, which are about disconnecting and require planning to get to, often with longer travel times and less frequent visits; the owner is generally a tourist, rarely integrating into the community. The 'Two-hour Home', however, is about regularity and frequent weekend use. It is about convenience and being manageable on Friday evening or for the Monday morning commute, and about being part of a community, not just a visitor.

Branded residences are well equipped to enter this 'Two-hour Home' space, and it could benefit brands, developers and buyers alike. Brands get more exposure, developers unlock greater returns, outside congested urban hubs, and owners are able to lock-up-and-leave their properties, knowing they will be professionally managed, maintained and secured by the brand's staff, offering peace of mind. The convenience is a major draw for globally mobile, time-poor, high-net-worth individuals.

The Lakes by YOO and the Six Senses Loire Valley Residences offer a blueprint for other brands, with homes that offer an all-encompassing brand identity, and demonstrate that the appeal of branded residences is not confined to urban settings, but within easy reach of them too.



Another blueprint for the 'Two-hour Home' could be the transformation of stately homes. Historically, a sign of wealth and status, now the high costs, intensive maintenance, and impracticality for modern life have meant they have fallen out of favour with the HNW purchaser. Instead, could we see stately homes repurposed into apartments, with a strong amenity offering and a sense of community, all within two hours of urban hubs?

And the concept is once again not London-centric. Manchester has the Peak and Lake Districts, or even the Yorkshire Dales or Moors, within reachable distance. The Cotswolds is accessible from Birmingham and Bristol as well as London. Edinburgh has the Cairngorms, and there is plenty of coastline around the UK within two hours of large urban centres. We can also look beyond the UK, where the concept could work around Madrid, Lisbon, Rome, Melbourne and New York.

This is not to say that there are no limitations to this model. Developments of this nature are often located in protected environments, buildings or conservation areas, which can be subject to stringent development laws. In some jurisdictions, there are also additional financial charges for second home ownership or planning obligations that enforce usage restrictions or an obligation to rent. Finally, whilst the race for space from Covid saw mass exodus to the countryside, there is now increasing pressure for people to return to the office.

Notwithstanding, the 'Two-hour Home' is about convenience and regularity – it's a second home that feels like an extension of your primary life. Savills GRDC have already consulted on several of these types of projects across Europe, so it is only a matter of time before we see more brands move into this space.

THE *ONES WHO SEE IT ALL*

AUTHORS: JASMINE HOPKINS AND ROSIE TUCKER

Data is one thing, but are agents the ultimate insiders...?

OPINION

We often discuss the benefits that branded residences offer to the three major stakeholders: brand, developer, and buyer. Yet, agents occupy a unique position that intersects with all three. As the sales and marketing lead for international branded projects and the trusted advisor to buyers, agents have the rare advantage of seeing all perspectives. This vantage point provides valuable insights into the sector's successes, challenges, and future opportunities.

BUYERS

A key driver behind the exponential growth of branded residences is buyers' desire to replicate the high-end lifestyle of a luxury hotel within their own home. However, lifestyle alone is not enough. Nearly all buyers also require an investment angle, whether through long-term capital appreciation or, in some instances, rental yield (or a combination of the two).

Resale value, while not an immediate concern for brands or developers, weighs heavily on buyers' decisions and thus carries reputational importance for schemes. As one Dubai-based agent explained: "In such a competitive market, it is the schemes with the strongest lifestyle offering that ultimately achieve the best long-term returns." This illustrates how lifestyle and investment are not opposing motivators but, in fact, deeply intertwined.

Traditionally, 'location is king' in residential real estate and, while location remains fundamental, the addition of a brand can help convert buyers to new or emerging areas.

SIX SENSES RESIDENCES LONDON, UK

At The Whiteley in London, agents point out that the prestige of the Six Senses brand—paired with its European flagship status—was pivotal in convincing buyers to invest in an area of the capital not yet fully established as a luxury residential destination.

COMMUNICATION

As the sector matures, buyers are increasingly familiar with the branded residences concept and offering, yet the common concerns which agents hear remain consistent. Service charges top the list, with even HNW buyers being acutely aware of annual costs. One potential solution lies in greater amenity-sharing with a co-located hotel. Yet, this approach is not without its complications, as shared amenities can reduce transparency in service charge allocations and compromise privacy due to transient hotel guests. Noise and disruption in communal areas are often cited as key concerns for potential buyers, making options that separate residents' amenities, such as dedicated pools or lounges, particularly attractive. Striking the right balance between managing service charge costs and separate facilities is essential to preserving privacy and enhancing the lifestyle experience associated with branded residences.

A further concern amongst buyers is potential usage restrictions, as many branded developments operate under 'touristic licensing' or require owners to participate in a mandatory rental program. It is therefore essential that agents make prospective buyers aware of what these restrictions entail, and how they may shape their ownership experience. For their part, developers and brands must begin with a clear understanding of their target market's priorities, although it will ultimately be the agents who address concerns directly with buyers, providing the reassurance and clarity that builds the confidence to proceed with a purchase.

MARKETING & SALES

For developers, a major advantage of partnering with a brand lies in the marketing and sales support provided throughout the project lifecycle. At the W Algarve—the fastest selling European branded project of its time—agents remarked that the most valuable brand contribution was having "a strong point of contact from the brand, someone who can answer anything that isn't your usual question".

Such collaboration complements the agent's role, instilling confidence in buyers by authentically communicating the brand offering. However, while the brand offers critical support, it is the agent's responsibility to execute the sale. A well-regarded sales and marketing agency leverages brand equity with marketing suites, show apartments, and targeted campaigns that directly reach HNW buyers.

"Developers need to know their buyer profile early on and then convey this in their marketing, viewing experience and 'touch and feel' e.g show apartments," says Carla McInrue, Associate Director, Savills Residential Development Sales at the Six Senses, Whiteley.

There is clear evidence that these efforts are yielding results, with agents consistently reporting a significantly higher viewing-to-deal conversion rate in branded residences compared to non-branded schemes.

AMENITIES & BENEFITS

As competition intensifies in the luxury residential market, brand touchpoints are becoming increasingly diverse, ranging from private dining rooms to pet grooming services to name but a few. Yet, even in markets like Dubai, where the level of amenity provision is already exceptionally high, leading agents comment that it is best to "stick to the basics." Discerning buyers are quick to see through gimmicky offerings that lack real, lasting value.

Instead, purchasers place the greatest importance on core services such as a well-run concierge, high-quality pool and gym facilities, spa and wellness amenities, as well as versatile spaces for events and remote working. Ultimately, what residents are truly buying into is the service ethos of the brand.

Beyond amenities, the wider brand benefits represent the real differentiator. Developments that can offer "money-can't-buy" experiences create a sense of exclusivity and community. These might include priority access to world-class sporting events, invitations to fashion launches or even curated encounters with celebrities. Such unique experiences elevate ownership from a real estate transaction into a lifestyle investment, reinforcing the prestige and status that come with being part of an exclusive branded residence community.

HYDE RESIDENCES DUBAI HILLS, UAE

BRAND AFFILIATION

Looking forward, what do agents advise for brands and developers seeking to strengthen their schemes and how are these brand affiliations changing?

First, the rise of 'funky and modern' brands is resonating strongly with certain buyer segments, particularly those seeking differentiation. However, established hotel brands still hold the greatest emotional pull. Their heritage in hospitality and care continues to align most closely with the features buyers desire above all else: trust, service, and confidence.

Fashion and automotive brands may carry prestige, but they do not, and often cannot, consistently deliver the same reassurance that hospitality-driven names provide. As agents observe, long-term success will depend on balancing innovation with the emotional trust that only the strongest hospitality brands can command.

Branded residences are no longer just about prestige, they represent the promise of a luxury lifestyle. While brand affiliation can spark initial interest, it's the lived experience that sustains long-term value and promotes investment in a development. Buyers are seeking more than bricks and mortar; they want trust, service, and a sense of effortless living that mirrors the best of luxury hospitality. Agents are uniquely placed to understand that the most successful schemes are those where lifestyle and investment are not competing priorities but complementary ones. As the sector evolves, it's clear that emotional resonance, service ethos, and authentic brand storytelling will define the future of branded living.

CLOSING REMARKS

AUTHOR: LOUIS KEIGHLEY

So, what's missing?

When I joined the team back in 2017, our annual reports focused on educating our audience on the branded residences concept, which, at the time, was a somewhat new and under-researched notion. Since then, the resounding and consistent message from our reports has been how fast the sector is growing and how much traction it is gaining across every region. The story has revolved entirely around **GROWTH** and **EVOLUTION**. In truth, while we may see small tweaks here and there in the sector's make-up, in the short to mid-term, we expect this to continue. The trajectory is unmistakable: through a deeper sectoral engagement, we anticipate a broader (and more diverse) spectrum of brands and a wider geographic reach. Beyond this, we have touched on the 'Two-hour Home' concept, which is already rapidly gaining momentum...So what can we expect to see in the future? What ideas and notions are currently under-exploited? I've outlined a couple of personal reflections that represent clear and compelling directions for the sector to explore in the years ahead:

The first is **SPORTS BRANDS**. Whilst we have seen Chelsea take a leap into the sector, where are the true sports brands...the likes of 'Nike Branded Residences' or 'The Residences by Adidas'? As we see a host of non-hotel brands enter the sector, I can't help but notice the absence of the sporting giants. World-famous athletes travel far and wide for off-season training, flocking to facilities like The Campus in Quinta do Lago, Portugal or La Manga in Spain. These athletes share many of the traits of UHNWIs around the globe, prioritising privacy, luxury living and exclusivity. Small hotel rooms don't offer the modern comforts of their own homes so surely there is a gap for exclusive sports brands to fill?

The next is **GAMING**. There are now, reportedly, 3.48 billion active gamers worldwide, representing 44% of the global population. If the focus for non-hotel brands is on the provision of a certain lifestyle, experience and the creation of a like-minded community, then this seems to be an obvious avenue to explore. NEOM has begun to look into this sector, attempting to create "a fully integrated campus, unlike any other, harnessing the most advanced technologies and environments to stimulate creativity and business opportunities". But is a global gaming hub in KSA the only opportunity? With so many globally captured by this industry, who's to say there isn't space for the creation of the likes of 'Sony Residences'? Be it on a large or small scale, there must be scope for these brands to create a multi-market presence with an underlying cross-border network...

And finally, **FILM**. Much like the sports industry, the film sector is characterised by a highly mobile talent base. A-list film stars often spend extended periods on location, frequently working at major film studios far from home. While entourages may attend to their daily needs, extended stays in hotel suites seldom provide the comfort, space, and privacy to which these high-profile individuals are accustomed. For many, especially when traveling with their families, discretion and seclusion are paramount. These dynamics point to a compelling opportunity for the branded residences model. An opportunity for UHNWIs to purchase exclusive, ultra high-end residences, operated and managed by a sector-leading brand in close proximity to world-famous film studios.

Whether in urban centres, rural or resort destinations, residence owners stand to benefit, not only from the potential for attractive rental returns during high-profile film productions, but also from the unique prestige of owning a property that has hosted A-list talent.

These are but a few recent reflections I thought would be interesting to share but which will come first? Which brands will entertain the opportunities? I hope to answer these questions in future reports.

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