



STATE OF THE INDUSTRY

BRANDED RESIDENCES FORUM 2025

WELCOME TO ...

BRANDED RESIDENTIAL REQUIRES EXPERTISE ACROSS A HOST OF DISCIPLINES

INVESTORS

OPERATORS

LEGAL ADVISORS

DESIGNERS & ARCHITECTS

SALES & MARKETING
PROFESSIONALS

BRANDS

DATA & MARKET INSIGHTS
PARTNERS

CONSULTANTS

FASHION HOUSES

SPONSORS

Data and Market Insights Partners:
Savills Global Development Consultancy & Global Branded Residences

AN EXCITING DAY AHEAD

WELCOME

STATE OF THE INDUSTRY

BRANDED RESIDENCES UNCOVERED
GLOBAL PERFORMANCE REVIEW & INSIGHTS

MAXIMIZING RETURNS, MINIMIZING RISK
HOW TO OPTIMIZE AND PROTECT VALUE FOR INVESTORS

WORLD BRANDED RESIDENCES AWARDS

THE PERFECT FIT
SELECTING THE RIGHT BRAND FOR RESIDENTIAL SUCCESS

THE REAL DEAL
UNPACKING THE FINANCIAL REALITIES

LEGAL STRUCTURES
PROTECTING INTERESTS OF INVESTORS, PURCHASERS & BRANDS

THE NEXT CHAPTER OF REAL ESTATE
REGENERATION OVER PRESERVATION

ICONIC BY DESIGN
CRAFTING THE NEXT WAVE OF LUXURY LIVING



SETTING THE STAGE





A CLOSER LOOK AT KEY CONCEPTS





DEFINING BRANDED RESIDENCES



- A private residence** – primary or second home
- Developed, marketed, sold** under a license agreement
- Often with requirement to be **operated to Brand Standards**
- Apartment, villas or chalets**
- Extensive services, amenities & facilities**
- Hospitality, Automotive, Fashion, Design and F&B brands**



ROLE OF DEVELOPER VS. BRAND

TO BE EXPLORED FURTHER IN PANELS



THE DEVELOPER DOES IT

FINANCES & DEVELOPS
GOVERNING DOCUMENTS
SALES & MARKETING



THE BRAND DOES IT

GRANTS THE LICENSE
PROVIDES STANDARDS
BRAND IMMERSION / TRAINING



THE BRAND MAY DO IT

MANAGE
FRANCHISE
RENTAL PROGRAMS
SUPPORT LEAD GENERATION
HOA ADMINISTRATION



STAKEHOLDER PERSPECTIVES



PURCHASER PERSPECTIVE:

Brand Resonance
Elevated Service
Modern Lifestyle
Peace of Mind



HOTEL INVESTOR / DEVELOPER PERSPECTIVE:

Brand Premiums
Absorption
Accelerated Capital Returns
Enhanced Hotel Economics



THE OPERATOR OR BRAND PERSPECTIVE:

Fresh Canvas
Brand Ambassadors
Value Creation

STAKEHOLDER PERSPECTIVES



PURCHASER PERSPECTIVE:

Brand Resonance
Elevated Service
Modern Lifestyle
Trust



HOTEL INVESTOR / DEVELOPER PERSPECTIVE:

Brand Premiums
Absorption
Accelerated Capital Returns
Enhanced Hotel Economics



THE OPERATOR OR BRAND PERSPECTIVE:

Fresh Canvas
Brand Ambassador
Unlocks Value

A HIGHLY ADAPTABLE MODEL

ACROSS MIDSCALE, PREMIUM, LUXURY & LIFESTYLE SEGMENTS



Six Senses London Hotel Residences at The Whiteley

CO-LOCATED



Fairmont Residences Solara Tower, Dubai

STANDALONE



BUYER CENTRIC DESIGN & PROGRAMMING

DRIVING INNOVATION



**LISTENING ROOM & SOUND
STUDIOS**



PRIVATE DINING CONCEPT



LONGEVITY & WELLNESS



BIOHACKING SUITE



LEGAL CONSIDERATIONS

A STRONG FOUNDATION ENABLES SUCCESS OVER TIME



DESIGNED FOR COMMUNITIES

SHARED VALUES ENTRENCHED



PRESTIGE PROTECTED

RESIDENCES ALIGNED WITH HOTEL



SHARED SERVICES MODEL ENABLED

CONTRACTUAL RIGHTS,
GOVERNING DOCS &
DEFENDABLE METHODOLOGY



BRAND ACTIVATION REQUIRES A TEAM

SAENTYS

Est. 2,502 m

Sectorlight

sezenth art

Conway+

Noë & Associates



corcoran sunshine
MARKETING GROUP

Colliers
INTERNATIONAL

Knight Frank

COMPASS

Douglas Elliman
EST. 1911
REAL ESTATE

Sotheby's

savills



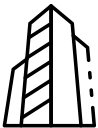


MARKET PERSPECTIVE



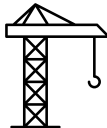
GLOBAL BRANDED RESIDENCES TODAY

KEY INDUSTRY FACTS & FIGURES



784

OPERATING
BRANDED RESIDENCES



1005

UNDER
DEVELOPMENT



75%

HOSPITALITY
BRANDED



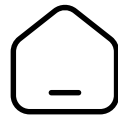
13%

COMPOUND ANNUAL
GROWTH SINCE 2000



37%

GLOBAL AVERAGE
BRAND PREMIUM



305,800+

BRANDED HOMES

 **+46K** Homes yor

STARTED IN USA, CENTER IS SHIFTING

OPEN AND IN THE PIPELINE

59%

OF GLOBAL SUPPLY OUTSIDE AMERICAS

35%

Network + pipeline

NORTH, CENTRAL
AMERICA &
CARIBBEAN



17%

Network + pipeline

EUROPE



21%

Network + pipeline

ASIA PACIFIC



21%

Network + pipeline

MIDDLE EAST &
AFRICA (INC. TURKEY)



6%

Network + pipeline

SOUTH AMERICA



GLOBAL SUPPLY

1789 projects
(operating + pipeline)

TOP 10 HOSPITALITY GROUPS

(NETWORK + PIPELINE)

HOTEL GROUP	GROUP ORIGIN	MAIN PRIVATE RESIDENCE BRANDS	# PROJECTS
Marriott international	USA		309
Accor	France		171
Four Seasons	Canada		96
Hilton	USA		74
Banyan Tree Group	Singapore		60
Hyatt	USA		58
Radisson	USA		50
IHG	UK		47
Wyndham			46
Emaar			41

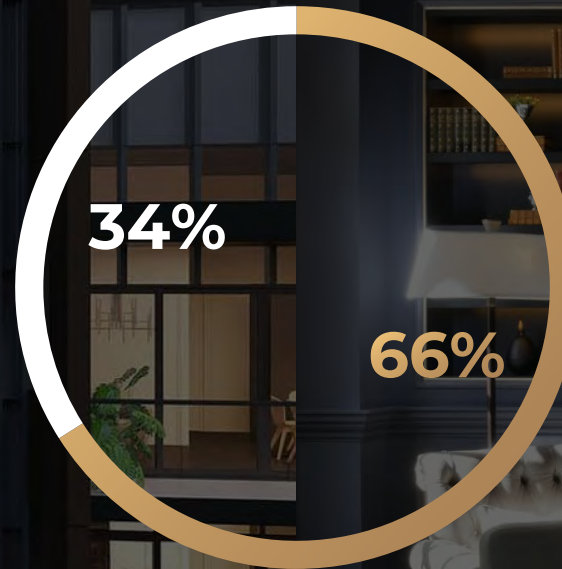
MARRIOTT INTERNATIONAL & ACCOR LEAD OVERALL, FOUR SEASONS SETS THE BENCHMARK FOR SINGLE BRAND PERFORMANCE



NO LONGER THE EXCLUSIVE DOMAIN OF LUXURY BRANDS

PREMIUM & MIDSACLE

+3% YOY ↗



LUXURY



AFRICA



EUROPE



NORTH AMERICA



MENA



CALA



ASIA PACIFIC

3 COUNTRIES ACCOUNT FOR MORE THAN 50% OF GLOBAL SUPPLY

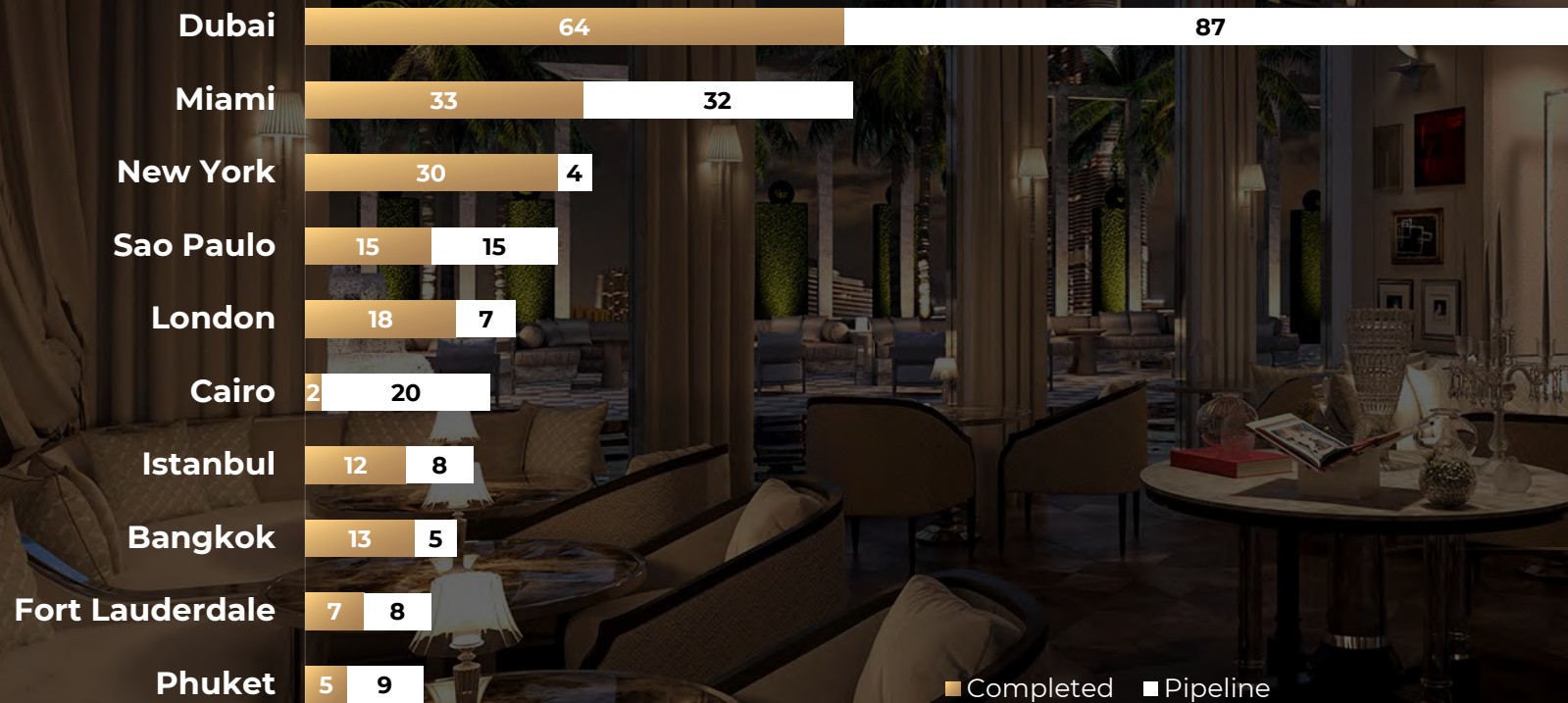


>50%

OF TOTAL SUPPLY IN USA, UAE & MEXICO

■ Completed ■ Pipeline

3 KEY GLOBAL BRANDED RESIDENCE MARKETS



DUBAI SUPPLY
MORE THAN...

2X MIAMI

■ Completed ■ Pipeline

DUBAI AS GLOBAL CENTER OF BRANDED RESI

22 PERCENT OF GLOBAL SUPPLY (367 PROJECTS)

2007

FIRST BRANDED RESIDENCE
WAS LAUNCHED IN DUBAI

64

BRANDED RESIDENCES
OPERATING

87

UNDER DEVELOPMENT

c.21%

COMPOUND ANNUAL
GROWTH SINCE 2008

72%

HOSPITALITY BRANDED
(OPERATING + PIPELINE)

15

PROJECTS LAUNCHED IN
THE LAST 12 MONTHS

c. 42,600 BRANDED HOMES IN DUBAI

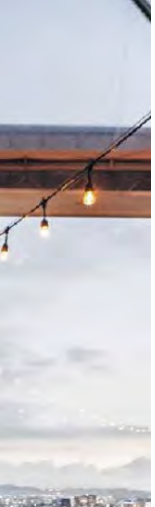





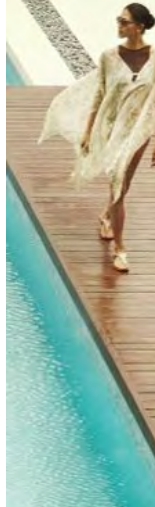


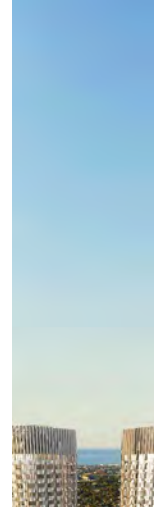

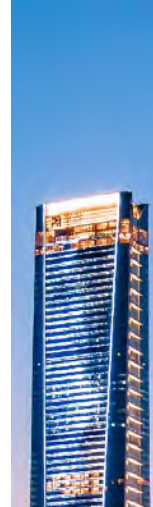





INTRODUCING ACCOR ONE LIVING



TWO DECADES+ OF EXPERIENCE

PROOF OF CONCEPT AROUND THE GLOBE

														
2001	2004	2005	2006/7	2008/9	2010	2012	2013/4	2015	2016	2018	2019	2023	2024	2025
Fairmont launches Residential Development in Acapulco	Opening of 1st Fairmont Heritage Place property in Acapulco	Fairmont Heritage Place acquires Franz Klammer Lodge	Mövenpick Residences Karon Beach Phuket opens 5th Fairmont Heritage Place opens	1st Raffles Residences Makati Commences Sales 1st International Property Opens Fairmont Heritage Place Zimbali	1st Fairmont Residences project opens in Vancouver	Raffles Residences Makati opens	Fairmont Residences Chengdu Fairmont Residences Nanjing Opens in China	SO/ Kuala Lumpur	Signed Fairmont Century Plaza Residences	Signed Raffles Residences Boston	Flagship Raffles One Shenzhen Bay Hotel and Residences Opens Signed Pullman Residences Newton Signed MGallery Residences, MontAzure Lakeside	Flagships opening: The OWO Residences by Raffles Raffles Boston Back Bay SO/ Uptown Residences Dubai	Pullman Residences Singapore is Completed	1st Mama Shelter Residences project opens in Dubai Mondrian Residences Gold Coast Opens





ACCOR ONE LIVING

360-DEGREE, TURNKEY SUPPORT ACROSS
EACH PHASE IN LIFE CYCLE OF PROJECTS

AN INDUSTRY-FIRST PLATFORM

FOCUSED ON THE DEVELOPMENT AND OPERATION
OF BRANDED RESIDENCES AND MUCH MORE...

A MACRO VIEW OF ACCOR ONE LIVING

OUR BRANDS ARE TRUSTED BY OUR PARTNERS

#2

OPERATOR
WORLDWIDE

26

PRIVATE
RESIDENCE
BRANDS

c.2B USD

TOTAL VALUE OF
RESIDENTIAL REAL
ESTATE SOLD ANNUALLY

c.8K

RESIDENTIAL OWNERS
(+26,000 IN PIPELINE)



Thank you!

