

BRANDED RESIDENCE TRACK



The Oberoi Residences Wadi Safar, Saudi Arabia



Welcome to the Branded Residence “Deep Dive”

INVESTORS

DESIGNERS &
ARCHITECTS

LEGAL ADVISORS

SALES & MARKETING
PROFESSIONALS

OPERATORS

FASHION HOUSES

BRANDS

CONSULTANTS

DATA & MARKET
INSIGHTS PARTNERS

SPONSORS

Exceptional
branded residential
communities require
expertise across a host
of disciplines

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Baccarat Residences Diriyah, Saudi Arabia

Setting the Stage

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One Hyde Park, London UK

An Exciting Morning Ahead

BRANDED RESIDENCE MASTER CLASS PROGRAMME

Setting the Stage
Global Industry insights & a Saudi perspective

Stakeholder Perspectives
How do branded residences create value for
investors, homeowners and brands

Navigating the Legal Framework
of branded residences in Saudi Arabia

Selling Luxury:
Marketing Branded Residences to Chinese Investors

The Brand Advantage
How branding enhances sales & marketing in residential real estate

Themed Networking –
Branded Residences

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The OWO Residences by Raffles, London

Key Concepts



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Nujuma, a Ritz-Carlton Reserve Residence

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

Forms Taken by Branded Residences

Across midscale, premium and luxury & lifestyle segments



Co-located



Stand-alone



Private residence clubs



Strata-hotel

Role of Developer vs Licensor

To be explored further in panels

The Developer Does It:

- Finances & develops
- Governing Documents
- Sales and marketing



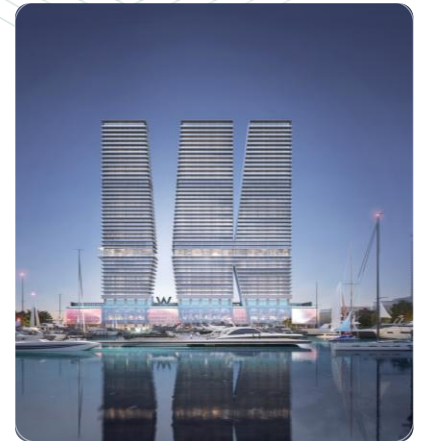
The Brand Does It:

- 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 premium, absorption
Differentiation
Enhanced hotel economics

THE OPERATOR OR BRAND PERSPECTIVE:



“Fresh Canvas”
Brand Ambassadors
Value creation

Demystifying Brand Premium

What do we mean by brand premium

Brand premium concept:

Achieved Pricing Premium

Attributed to Branding

Realized by Developer



Armani Residences Diriyah, Saudi Arabia

Firms Analyzing Premiums Include:



Savills Global Development Consultancy

Global Branded Residences

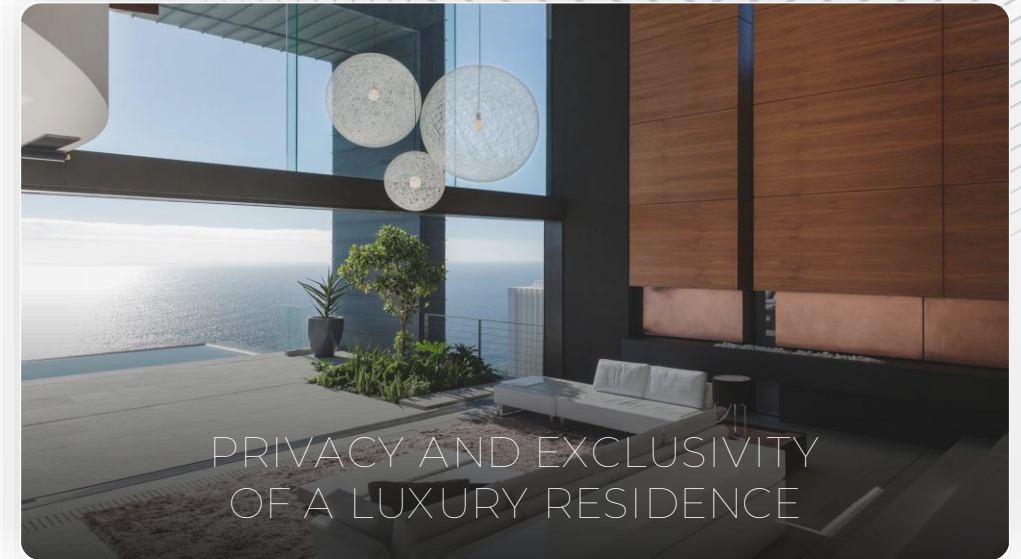
WATG

Knight Frank

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The Delicate Balance

“Thoughtful integration, discrete access & a service philosophy that is homeowner centric are keys to striking this balance”



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Market Perspective



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Four Seasons Private Residences, Shura Island at The Red Sea

Branded Residences Today

Key Industry Facts & Figures



788

Branded Residences
Operating**



912

Under Development**



79%

Hospitality Branded*



12.9%

Compound Annual Growth
Since 2000*



33%

Global Average Brand
Premium*



260,000

Branded Homes*

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Top 10 Hospitality Groups (network + pipeline)

HOTEL GROUP	GROUP ORIGIN	MAIN PRIVATE RESIDENCE BRANDS	# PROJECTS
Marriott International	USA	THE RITZ-CARLTON RESIDENCES, ST. REGIS RESIDENCES, W RESIDENCES, WESTIN RESIDENCES, AUTECARD RESIDENCES, MARRIOTT RESIDENCES, JW MARRIOTT RESIDENCES, BVLGARI HOTELS & RESORTS	269
Accor	FRANCE	RAFFLES RESIDENCES, MONDRIAN RESIDENCES, Fairmont RESIDENCES, SLS HOTEL & RESIDENCES, swissôtel RESIDENCES, MGallery RESIDENCES, NOVOTEL RESIDENCES, SOY, FAENA, RIXOS, 25h, SOFITEL RESIDENCES	158
Four Seasons	CANADA	FOUR SEASONS RESIDENCES	85
Hilton	USA	WALDORF ASTORIA, CONRAD HOTEL & RESORTS, Hilton	68
Banyan Tree Group	SINGAPORE	BANYAN TREE RESIDENCES, ANGSAÑA RESIDENCES, CASBA	55
Hyatt	USA	PARK HYATT®, GRAND HYATT, Alila, ANDAZ	47
IHG	UK	REGENT, SIX SENSES, INTERCONTINENTAL	46
Rosewood	HONG KONG	ROSEWOOD HOTELS & RESORTS	40
Mandarin Oriental	HONG KONG	MANDARIN ORIENTAL RESIDENCES	29
Kerzner	UAE	One&Only, ATLANTIS THE PALMS, DUBAI	29

Marriott International & Accor Lead Overall, Four Seasons sets the Benchmark for Single Brand Performance

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No Longer the Exclusive Domain of Luxury Brands



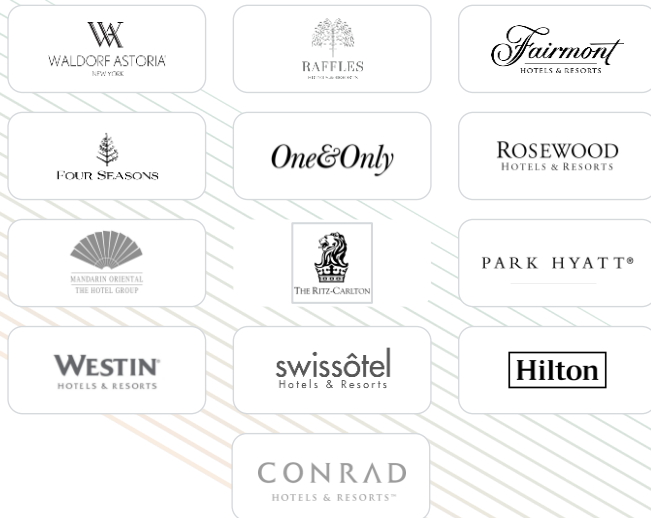
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Segmentation Evolving With Market Needs

Lifestyle & Leisure Branding on the Rise

CLASSIC HOSPITALITY

67%



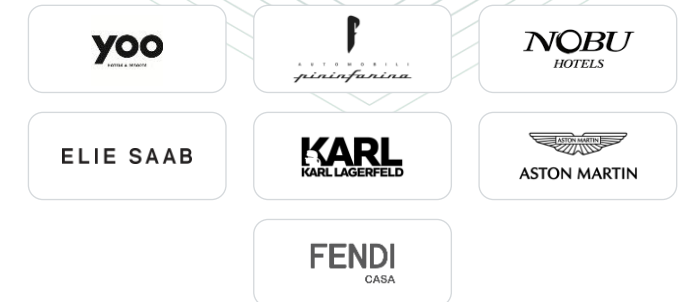
LIFESTYLE & LEISURE HOSPITALITY

↑ 12% ↑



DESIGN, F&B,
AUTOMOTIVE & FASHION

21%



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Started in the US... Center is shifting

44% of Branded Residences are now in Asia + MENA

29%

NORTH CENTRAL AMERICA
& CARIBBEAN

Completed: 297
Pipeline: 195

17%

EUROPE

Completed: 120
Pipeline: 171

10%

SOUTH AMERICA

Completed: 67
Pipeline: 116

20%

MIDDLE EAST & AFRICA
(INCL TURKEY)

Completed: 113
Pipeline: 228

23%

ASIA

Completed: 191
Pipeline: 196

43%

GLOBAL MARKET SHARE OF ASIA + MENA

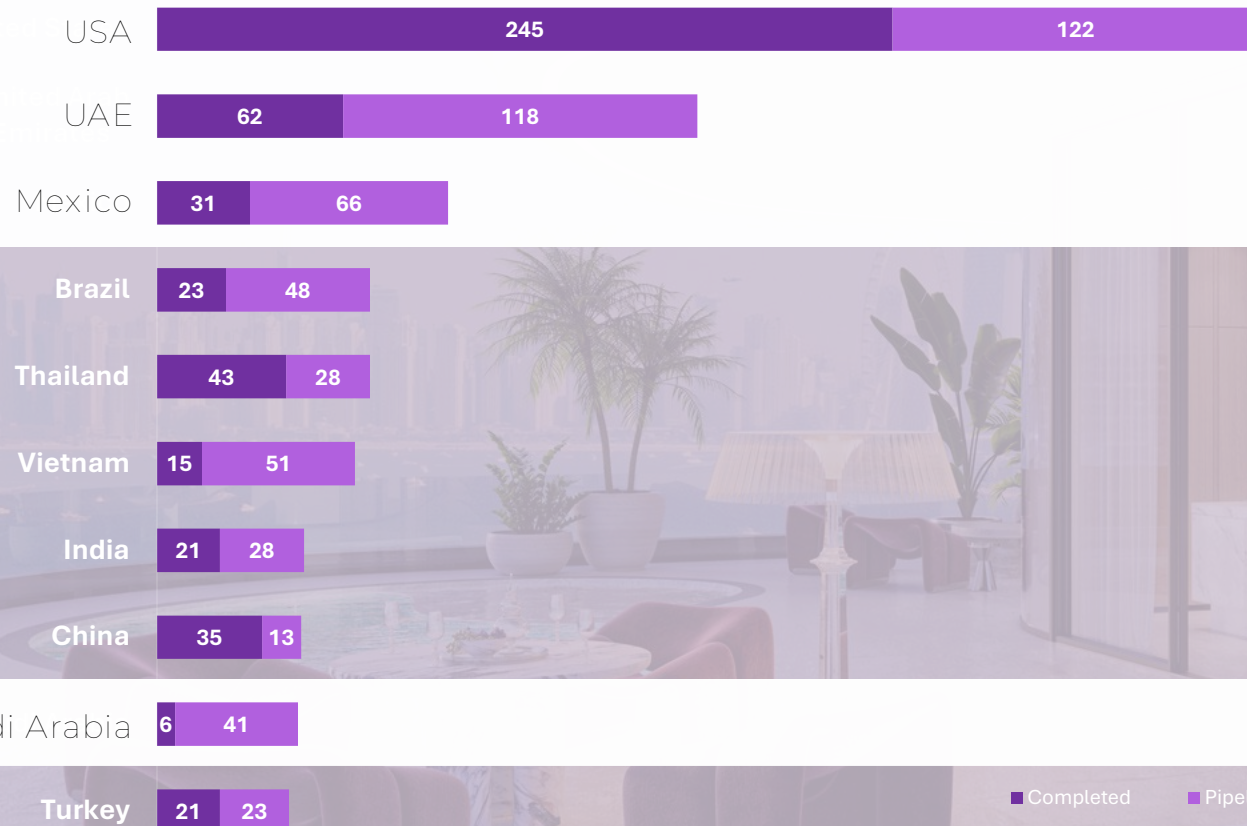
GLOBAL SUPPLY

1,701

PROJECTS
(Operating + Pipeline)

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Saudi Arabia is Climbing the Leaderboard



> 60%

of total supply is located
in USA, UAE & Mexico

2.8%

of total supply in Saudi

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Branded Residences in Saudi Arabia

2015

Year the First Branded Residence
was Launched in KSA

6

Branded Residences Operating*

40+

Under Development

18%

Standalone Residences
(including hospitality &
non-hospitality brands)

77%

Hospitality Branded Residences
(Operating & Pipeline)

14

Projects Launched between
2023-2024

c.3,700

Branded homes in Kingdom of Saudi Arabia

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What Is Driving Branded Residence Growth?

Unmet consumer needs, innovation, better targeting & stronger platforms



CONSUMERS SEEKING...



Originality



Inspired Stories



Authenticity

INNOVATION



New Branding
Options

FOR DEVELOPERS



More precise targeting

DELIVERY



Platforms which carry
brand promises into
operating phase

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Introducing Accor One Living

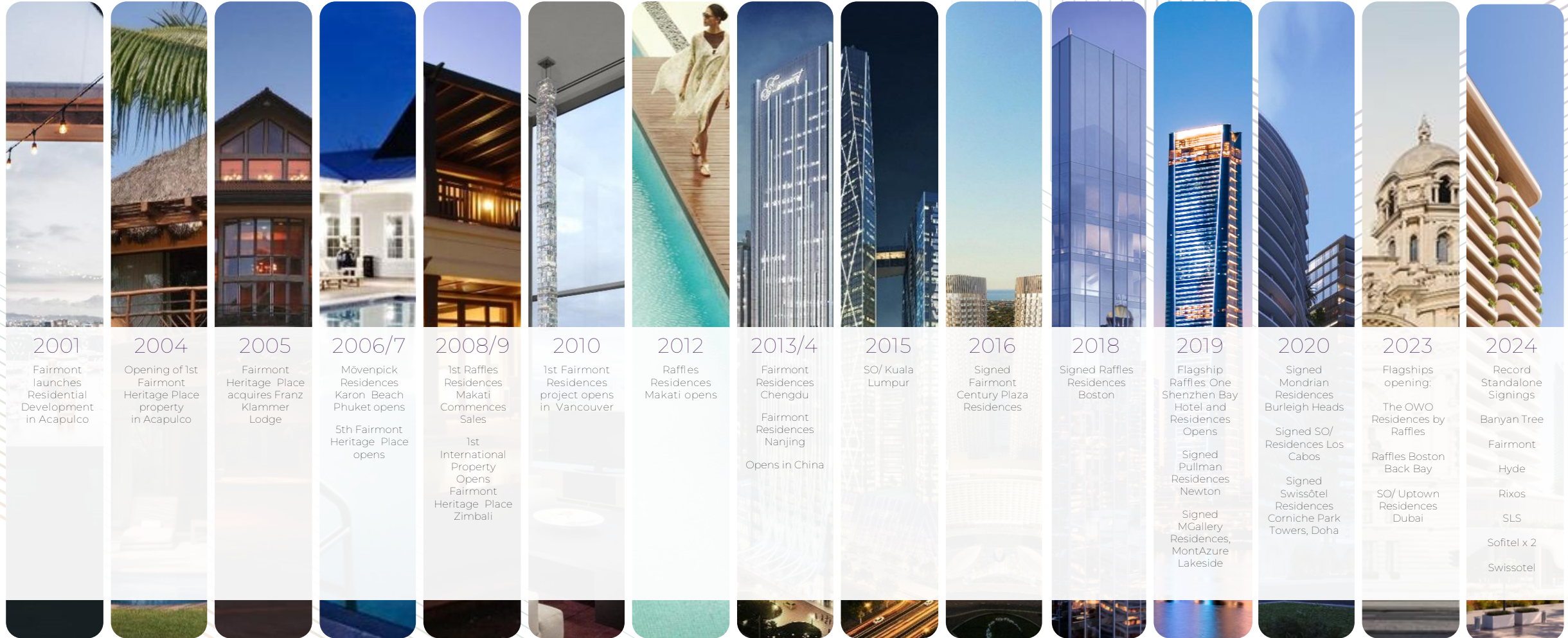
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Rixos Dubai Islands Residences, UAE

Two Decades+ of Experience

Proof of concept around the globe



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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,
PRIVATE MEMBER CLUBS, AND MUCH MORE...

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ACCOR **ONE** LIVING

Delivers turnkey, 360-degree solutions
to development partners

Getting the agreements in place is the starting line, not the finish.
We support subsequent phases by:

Customizing the service
offering, residential
amenities, unit mix and
owner benefits to meet
needs of target buyers

Collaborating with partners
and their legal advisors to
ensure Governing Documents
protect all stakeholders –
hotel owner, operator, buyers

Residential sales and
marketing oversight
& marketed support

Activating
Pre-opening
support and on-going
Operations leadership

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ACCOR'S GLOBAL LEADERSHIP IN BRANDED RESIDENTIAL

OUR BRANDS ARE TRUSTED BY OUR PARTNERS

#2

OPERATOR
WORLDWIDE

25

PRIVATE RESIDENCE
BRANDS

c. 2B USD

TOTAL VALUE OF
RESIDENTIAL REAL
ESTATE SOLD ANNUALLY

c. 8K

RESIDENTIAL OWNERS
(AND 26,000+ IN PIPELINE)

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Category Pioneering Brands



Fairmont

SOFITEL
HOTELS & RESORTS



PULLMAN
HOTELS AND RESORTS



RAFFLES
HOTELS & RESORTS



GALLERY
HOTEL
COLLECTION

HYDE



SLS
HOTELS & RESORTS

MONDRIAN

25h
heimat by twenty five hours

... & Exciting Innovators



Keys to Success in Saudi

Market Driven Design



Amenities & Facilities

Unit Mix

Sizes & Features

Protects All Stakeholders



Governing Documents

Differentiation & Demand



Resonance

Reach



Thank You!