RIYADH

SAVILLS BRANDED RESIDENCES

MAY 2025

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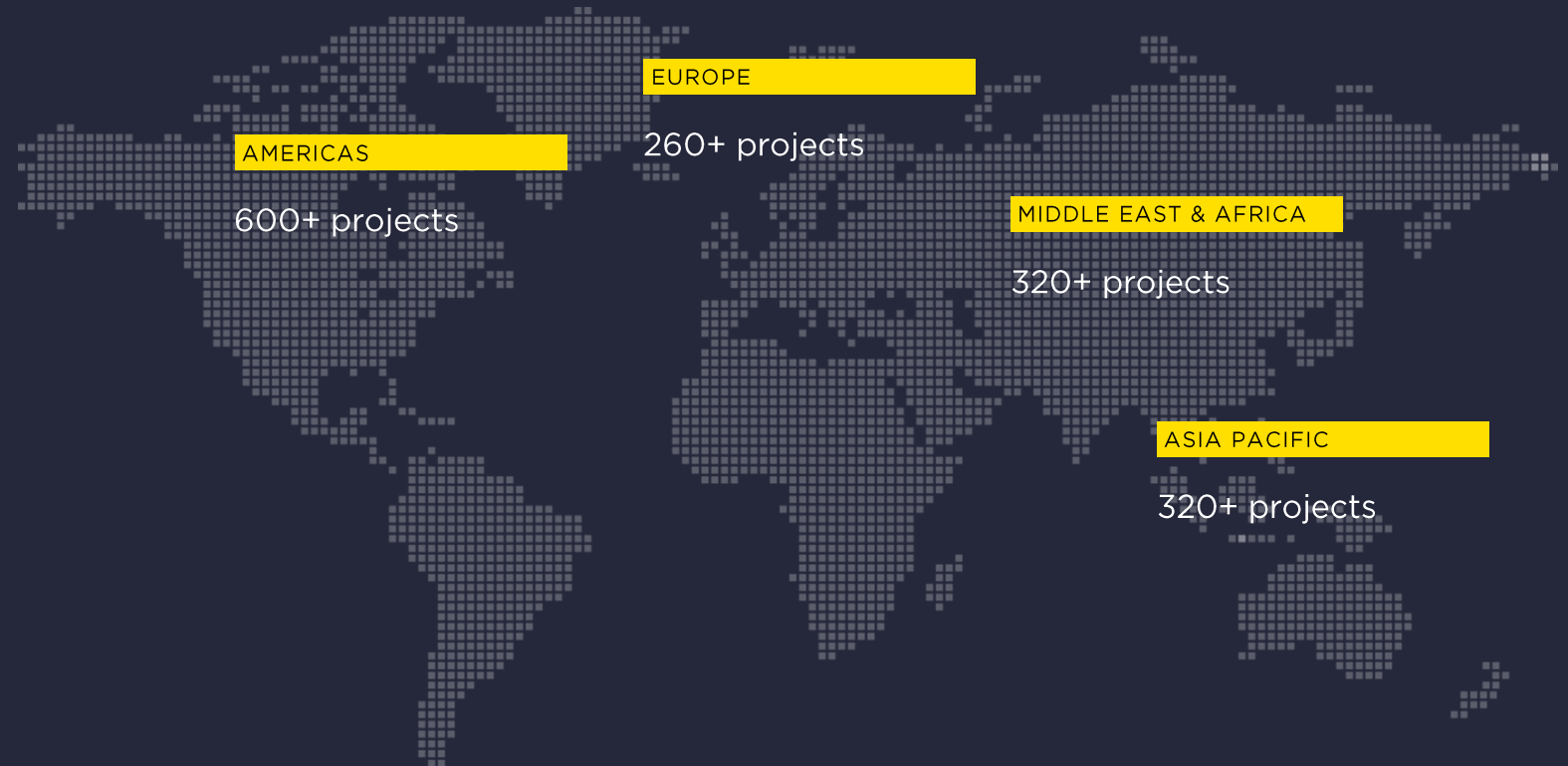
SAVILLS BRANDED RESIDENCES

MAY 2025

Branded residences globally

Historically centred in North America, today's branded residential schemes can be found in almost every corner of the globe. Across the world, there are 740 completed schemes with over 760 schemes in the pipeline expected to be delivered by 2030, significantly increasing the current supply.

1,500+
projects

200+
brands

95+
countries

EUROPE

260+ projects

AMERICAS

600+ projects

MIDDLE EAST & AFRICA

320+ projects

ASIA PACIFIC

320+ projects

Global Residential Development Consultancy

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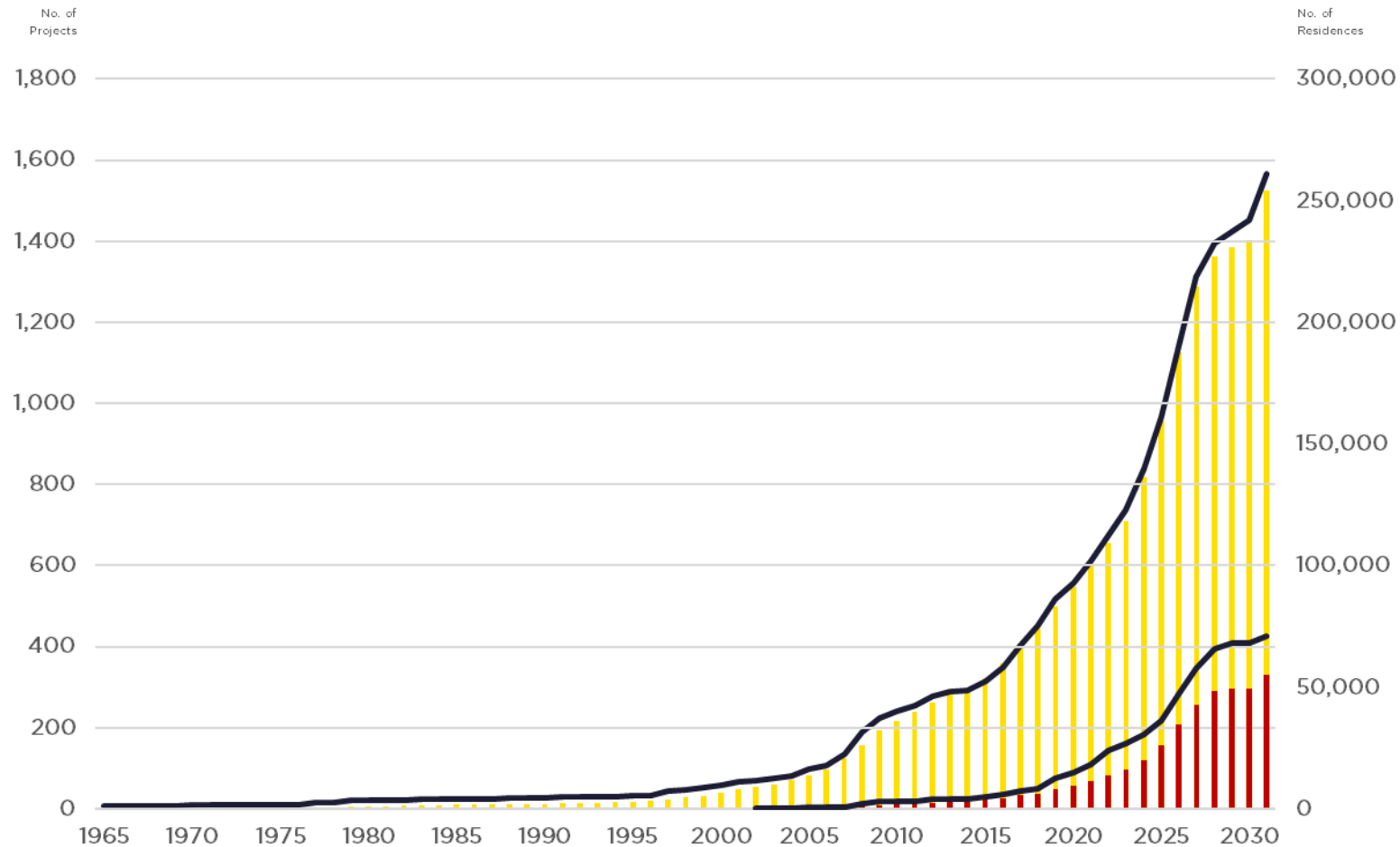
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200+ brands

95+ countries

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260+ projects

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MIDDLE EAST & AFRICA

320+ projects

ASIA PACIFIC

320+ projects

Tremendous <mark>growth</mark> globally...

Forecast growth is in line with historical trends and in the past decade, branded residences have increased by more than **180%** globally...

No. of Projects / No. of Residences chart, 1965–2030
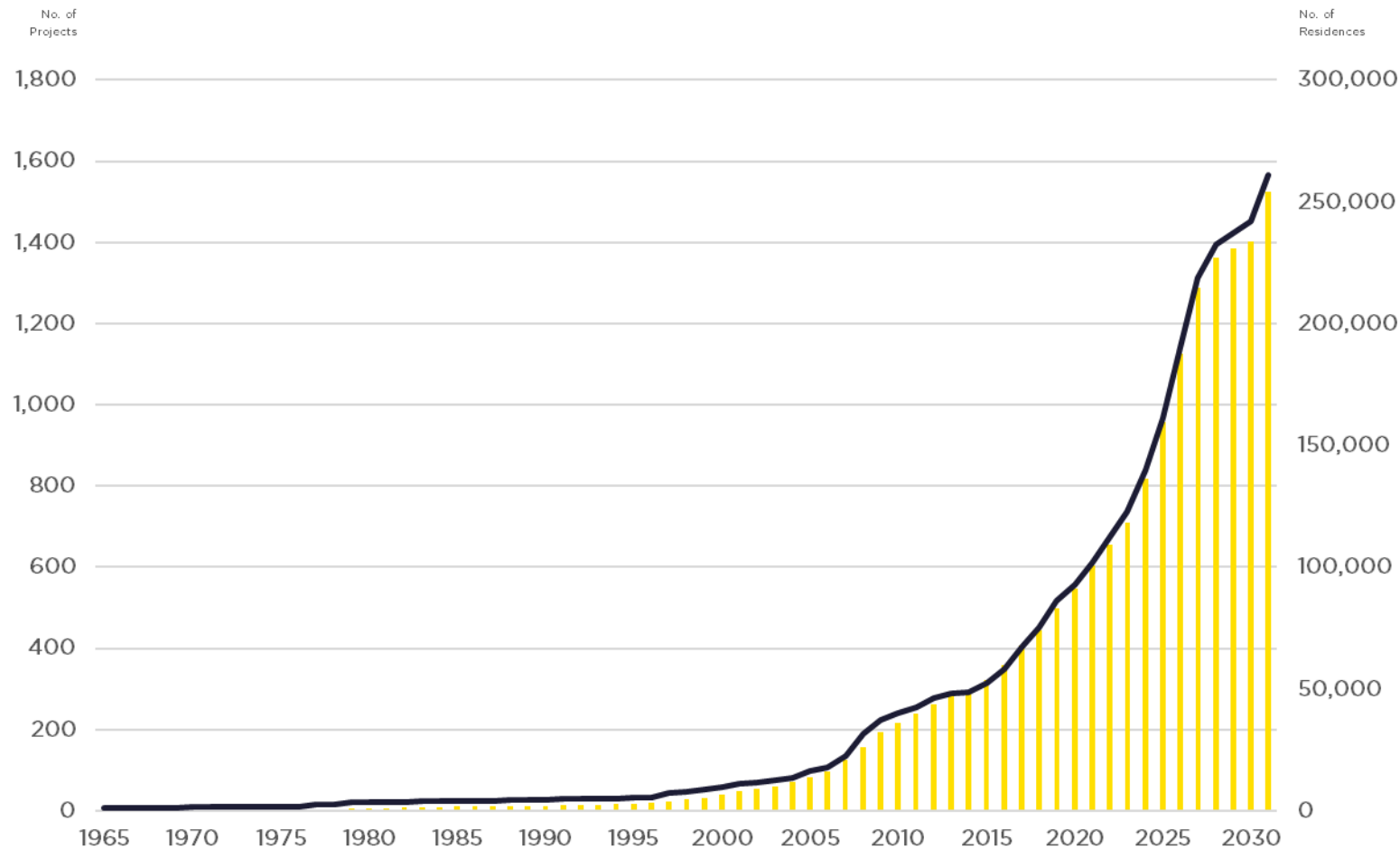
... and even more so ==regionally==...

Forecast growth is in line with historical trends and in the past decade, branded residences have increased by more than 180% globally... and **600%** regionally...
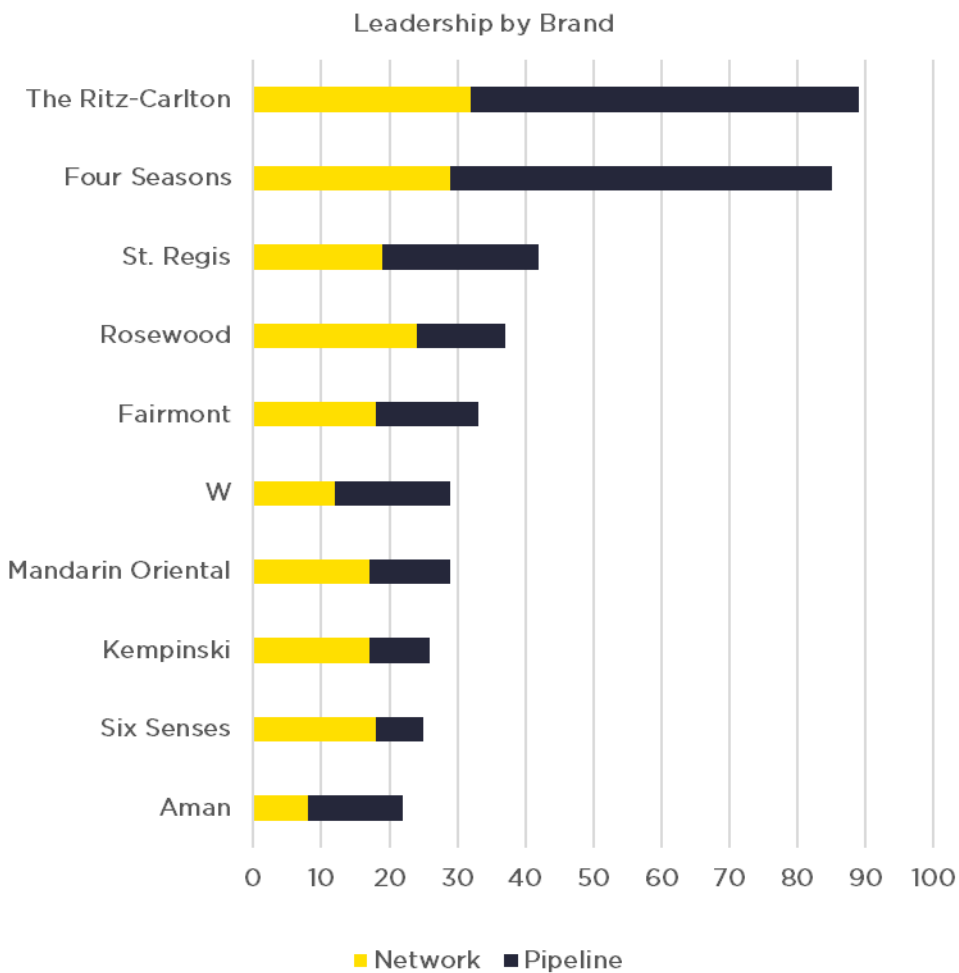

No. of Projects / No. of Residences chart showing historical growth from 1965 to 2030.

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Regional activity is concentrated in 1 country

The Middle East and Africa region has increased the fastest in the last decade by 600% and it exhibits the strongest growth over the forecast period until 2031 of more than 270%.
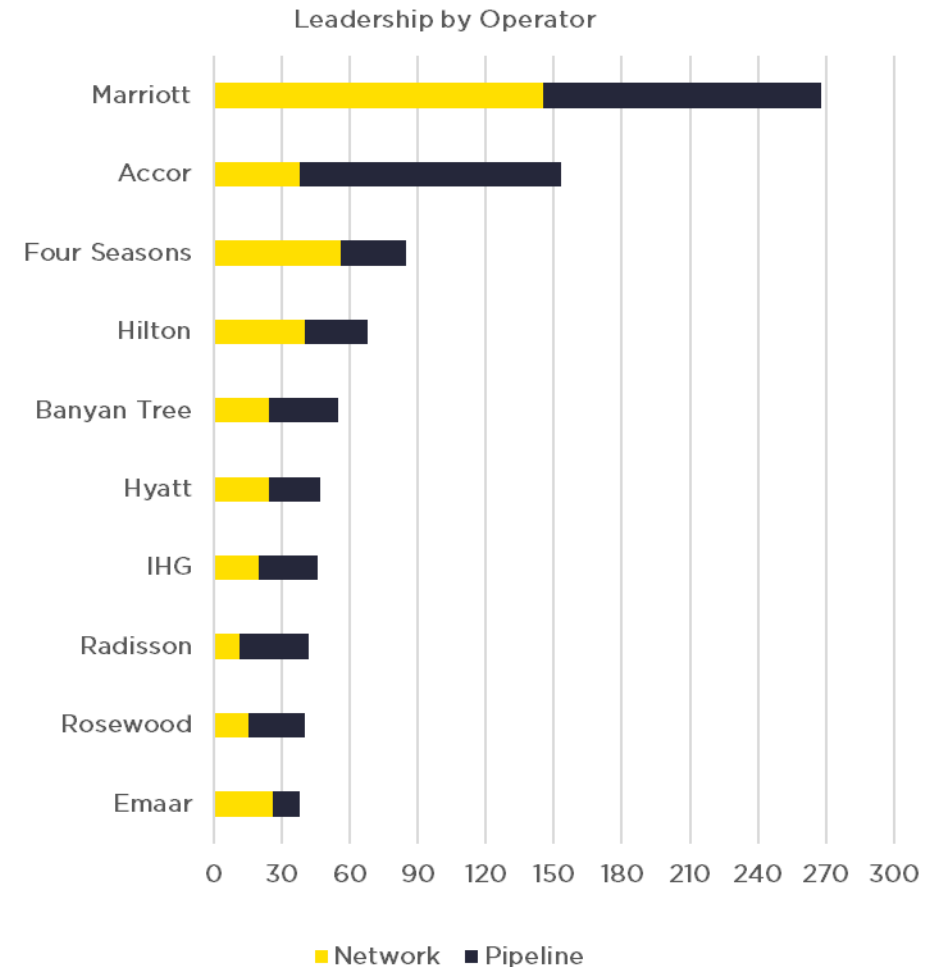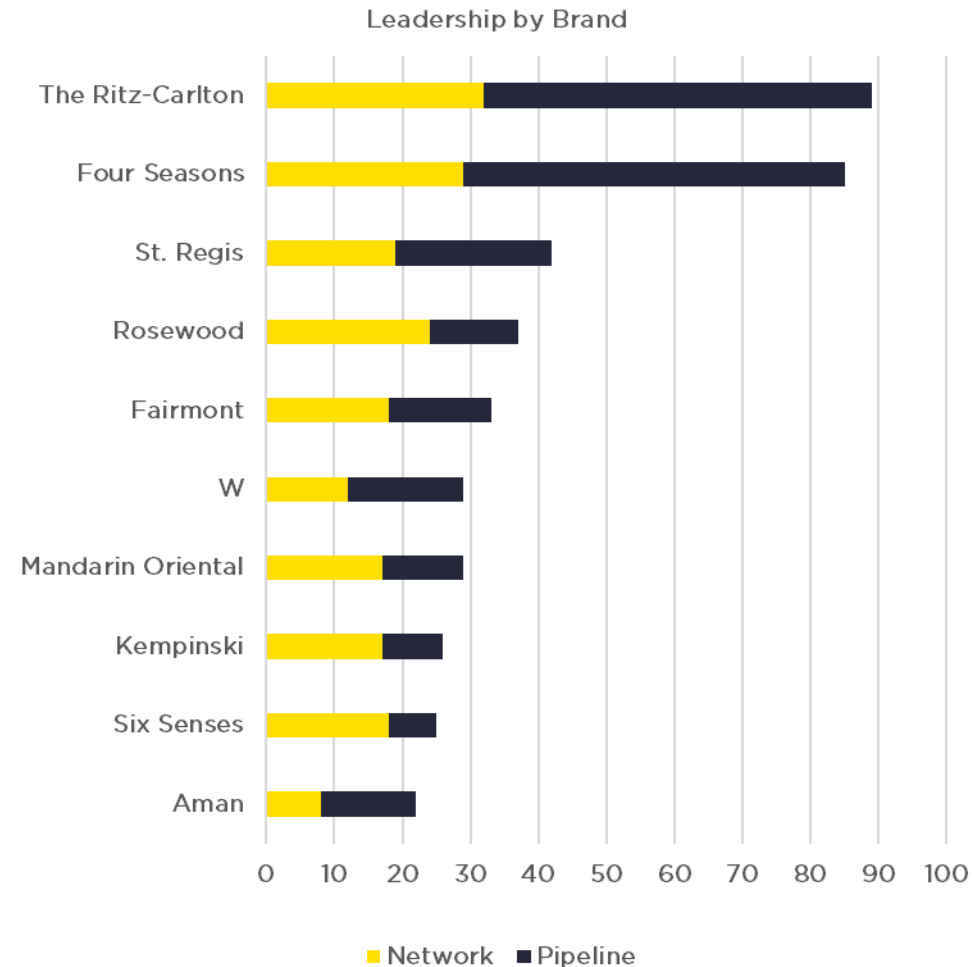

330+
projects

110+
brands

20+
countries

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Brand is king...

The Ritz-Carlton has become the leader with 89 projects...

Leadership by Brand

Brand	
The Ritz-Carlton	
Four Seasons	
St. Regis	
Rosewood	
Fairmont	
W	
Mandarin Oriental	
Kempinski	
Six Senses	
Aman	

■ Network ■ Pipeline

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Brand is king... but **Operators** are key...

The Ritz-Carlton has become the leader with 89 projects... and Marriott remains the leader as an operator with 75% more projects than Accor.

Leadership by Brand

The Ritz-Carlton
Four Seasons
St. Regis
Rosewood
Fairmont
W
Mandarin Oriental
Kempinski
Six Senses
Aman

■ Network ■ Pipeline

Leadership by Operator

Marriott
Accor
Four Seasons
Hilton
Banyan Tree
Hyatt
IHG
Radisson
Rosewood
Emaar

■ Network ■ Pipeline

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... and what about the Middle East and Africa?

The landscape changes rather dramatically if the region is examined more closely... as the Address claims its leadership...

Leadership by Brand
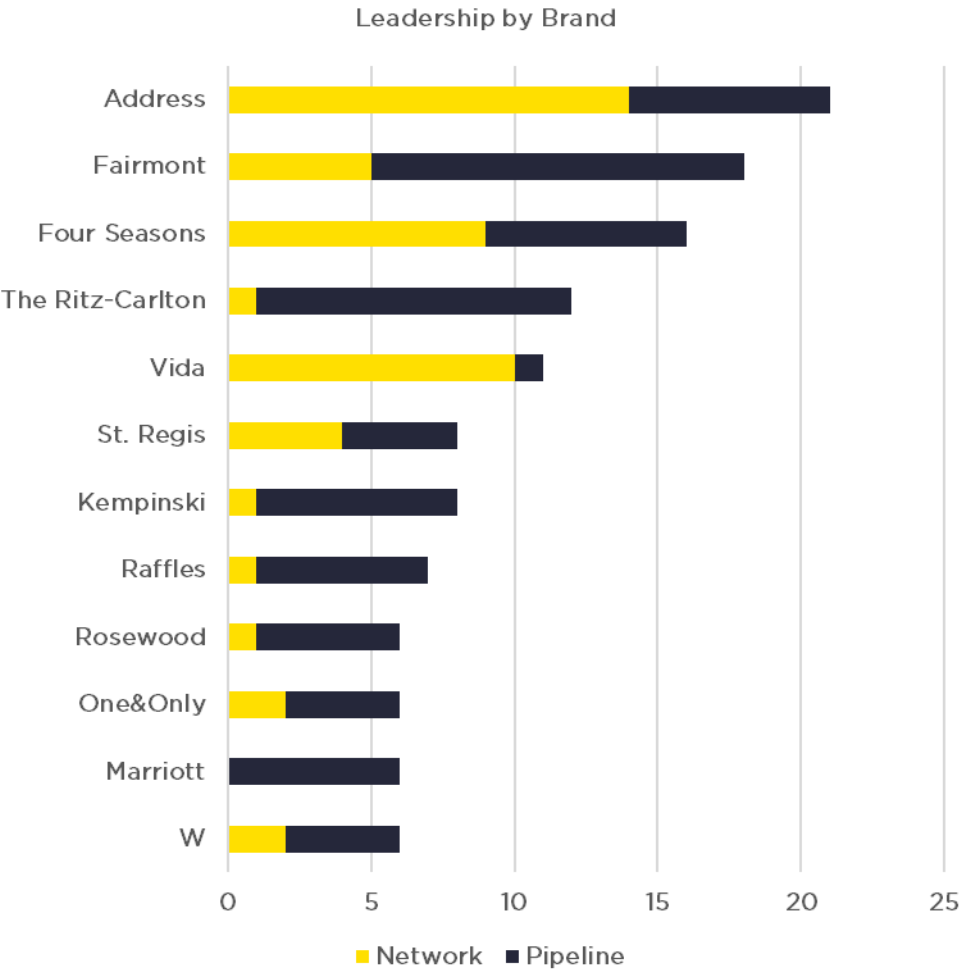
... and what about **Middle East and Africa**?

The landscape changes rather dramatically if the region is examined more closely... as the Address claims its leadership... and Accor takes the lead as the most active operator.
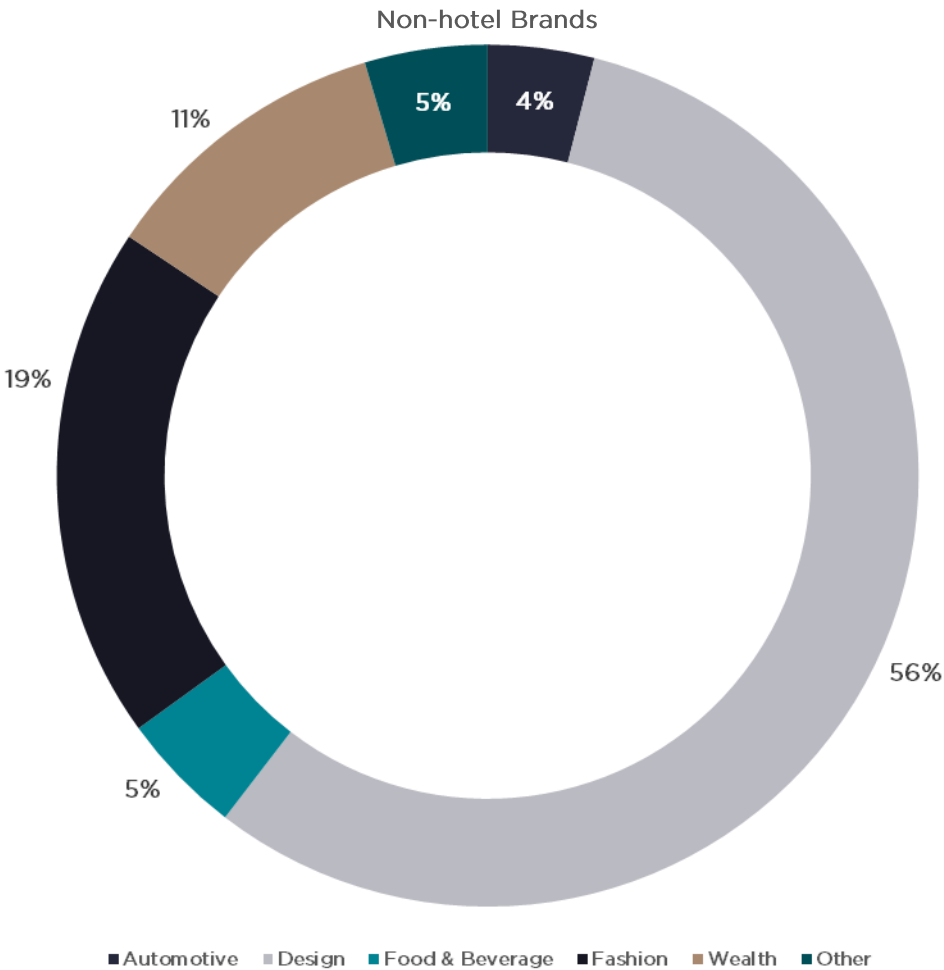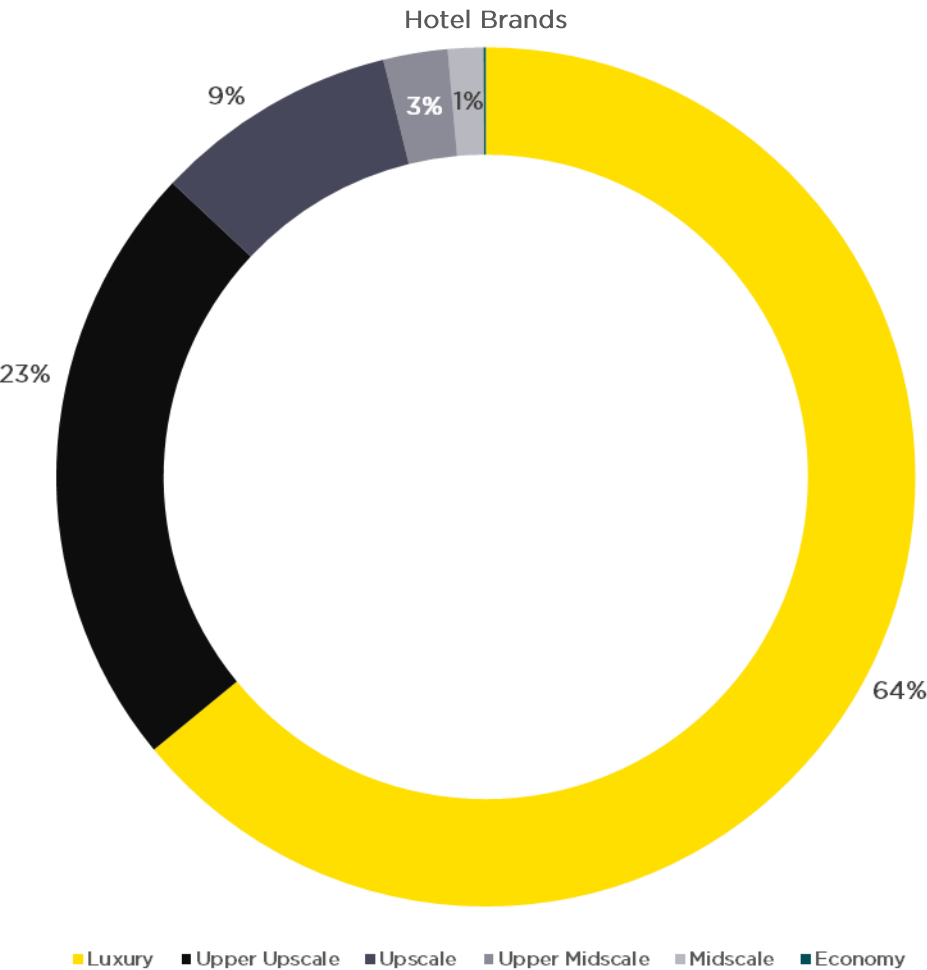

Leadership by Brand

Leadership by Operator

Network Pipeline
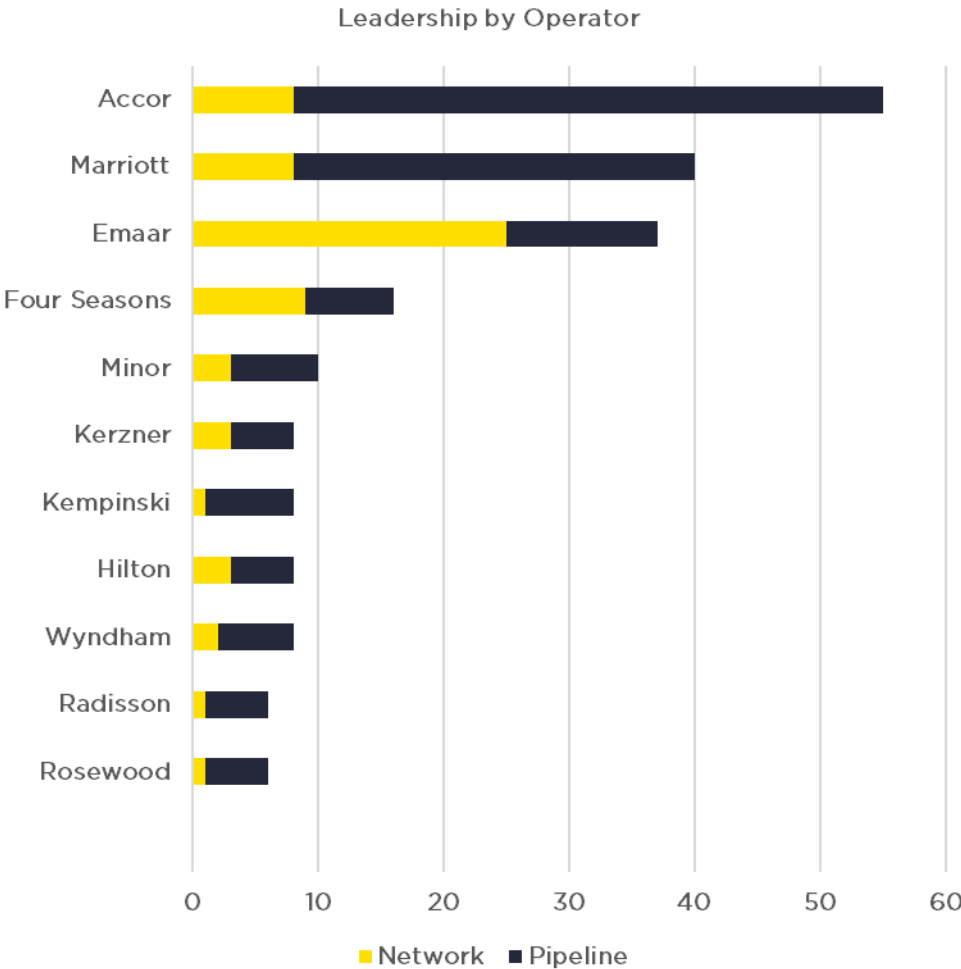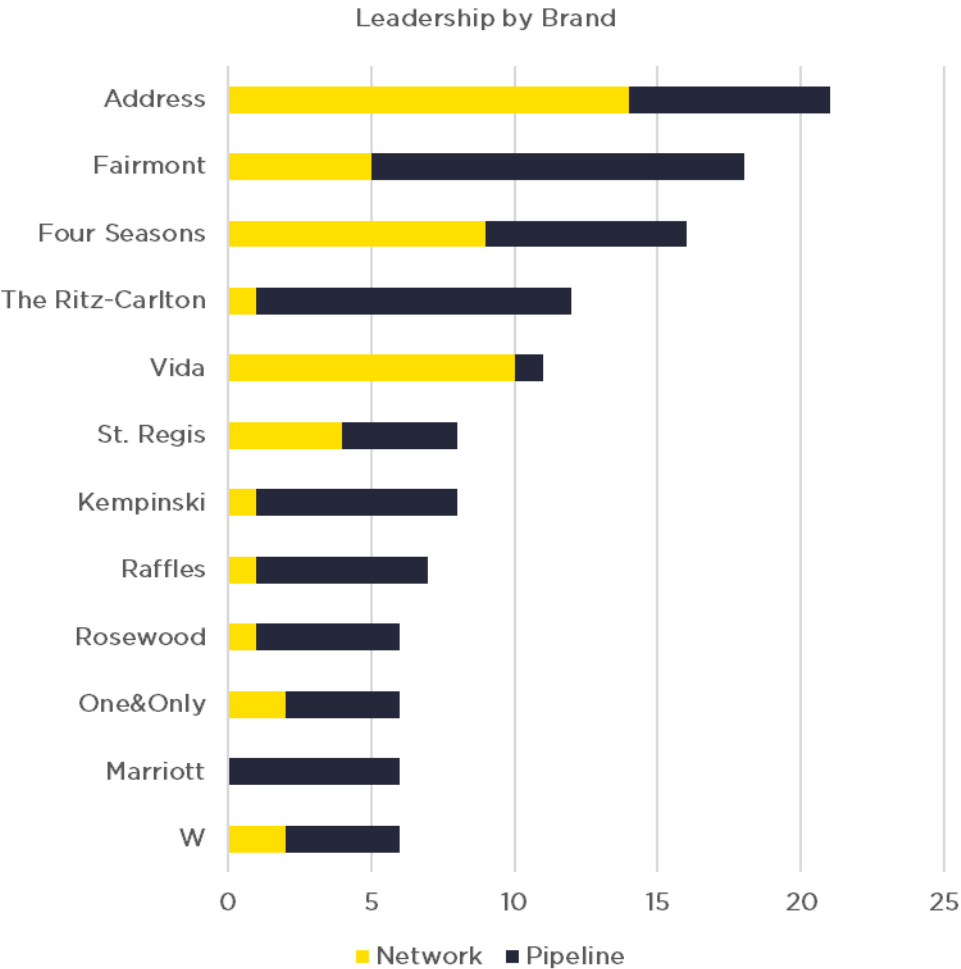
Where are **non-hotel brands**?

YOO remains the leader in the *non-hotel* branded space to a considerable extent with 98 projects.

Network ■ Pipeline
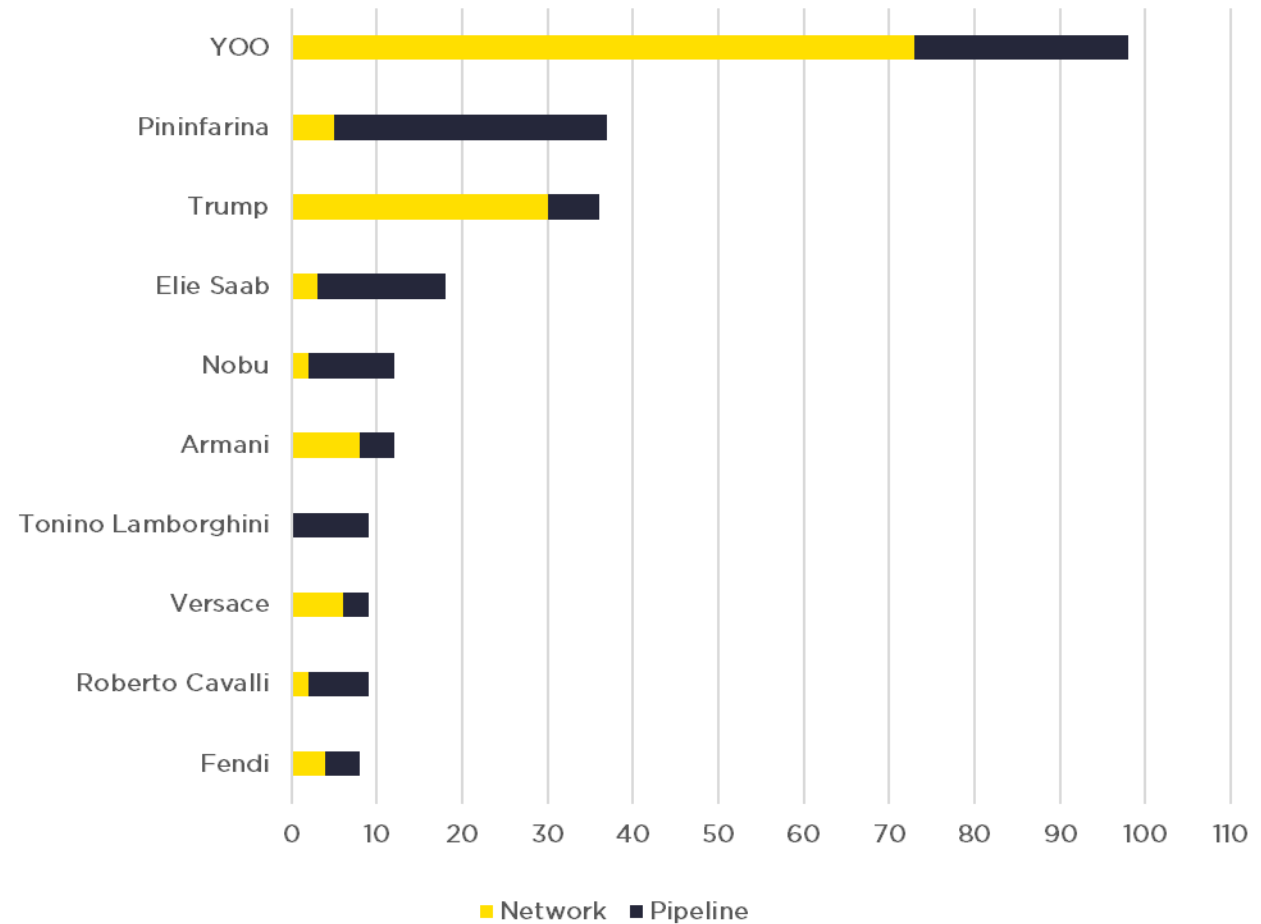
The industry continues **evolving** ...
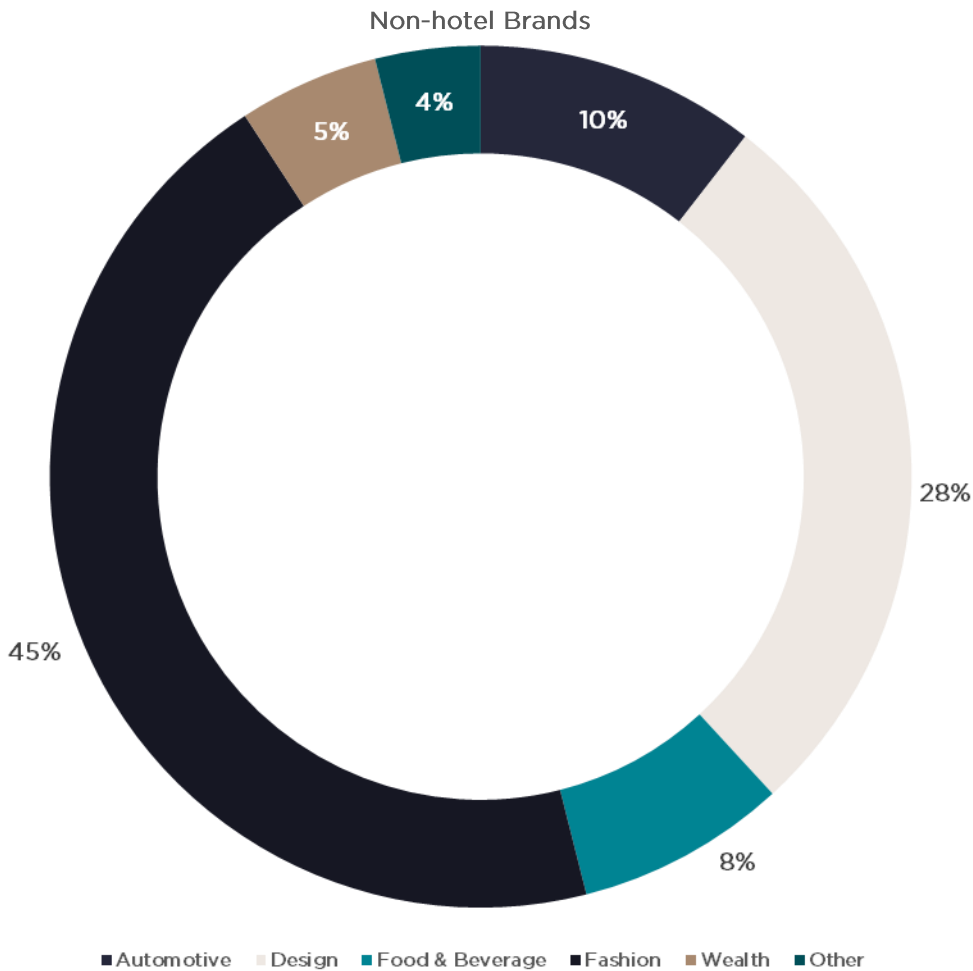
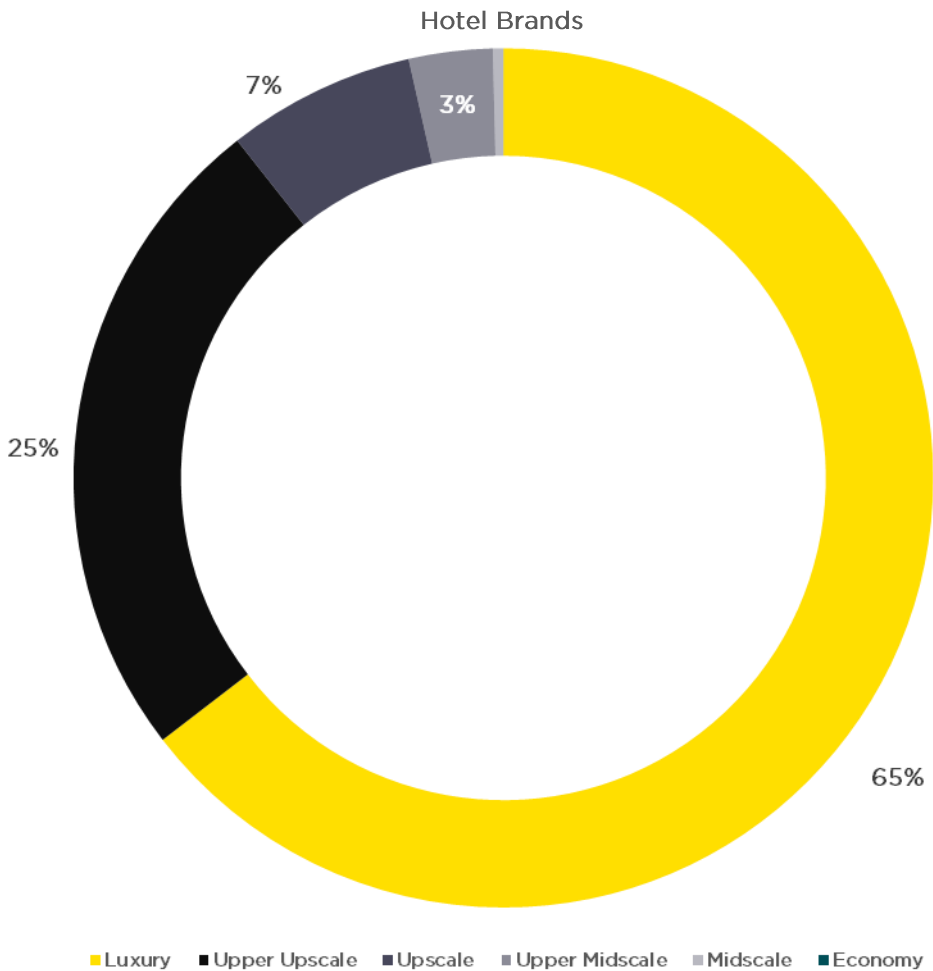The luxury and upper upscale brands, and design brands, are the dominant segments across hotel and non-hotel brands globally...

Hotel Brands

64%
23%
9%
3%
1%

■ Luxury ■ Upper Upscale ■ Upscale ■ Upper Midscale ■ Midscale ■ Economy

Non-hotel Brands

56%
19%
11%
5%
5%
4%

■ Automotive ■ Design ■ Food & Beverage ■ Fashion ■ Wealth ■ Other

EVOLUTION INSIGHTS

# The industry is constantly **evolving**... even in **MEA**

The luxury and upper upscale brands, and fashion brands, are the dominant segments across hotel and non-hotel brands globally... which is true in Asia Pacific, but segments are constantly evolving.
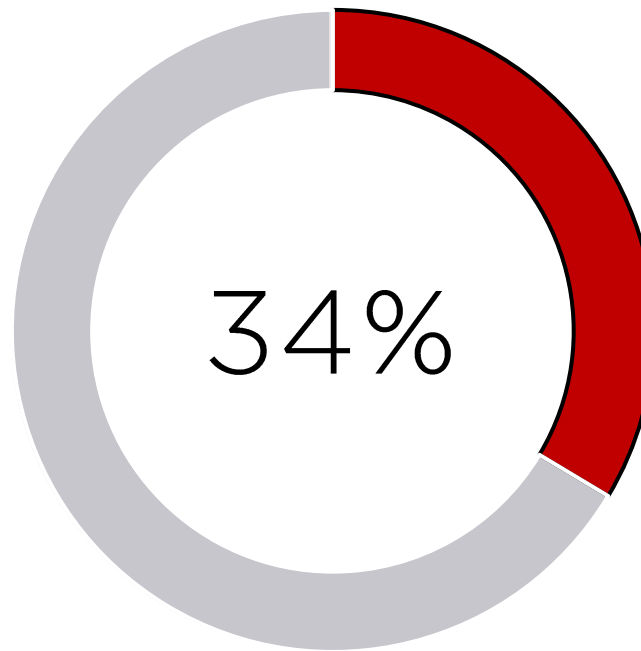
Hotel Brands

- 65%
- 25%
- 7%
- 3%

Legend: ■ Luxury ■ Upper Upscale ■ Upscale ■ Upper Midscale ■ Midscale ■ Economy

Non-hotel Brands

- 28%
- 8%
- 45%
- 5%
- 4%
- 10%

Legend: ■ Automotive ■ Design ■ Food & Beverage ■ Fashion ■ Wealth ■ Other

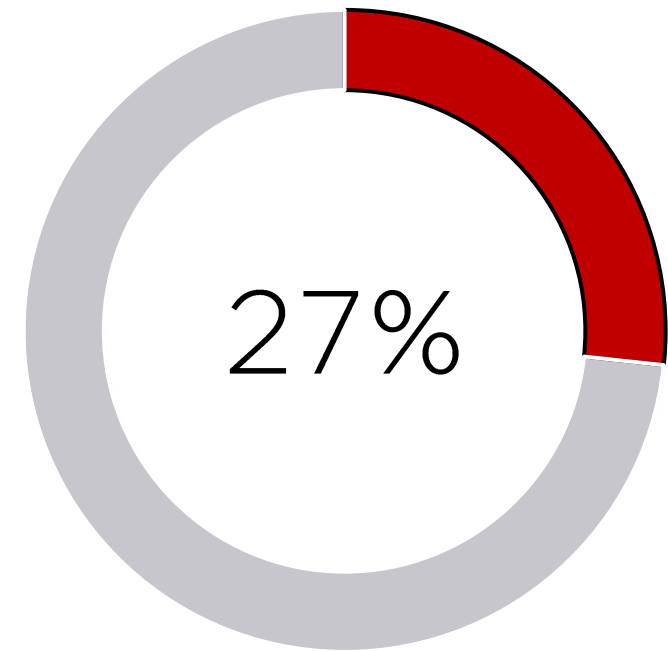Global Residential Development Consultancy

Value proposition

The most tangible value proposition directly associated with branded residences that captures the attention of developers is the **premium** that the brand commands.
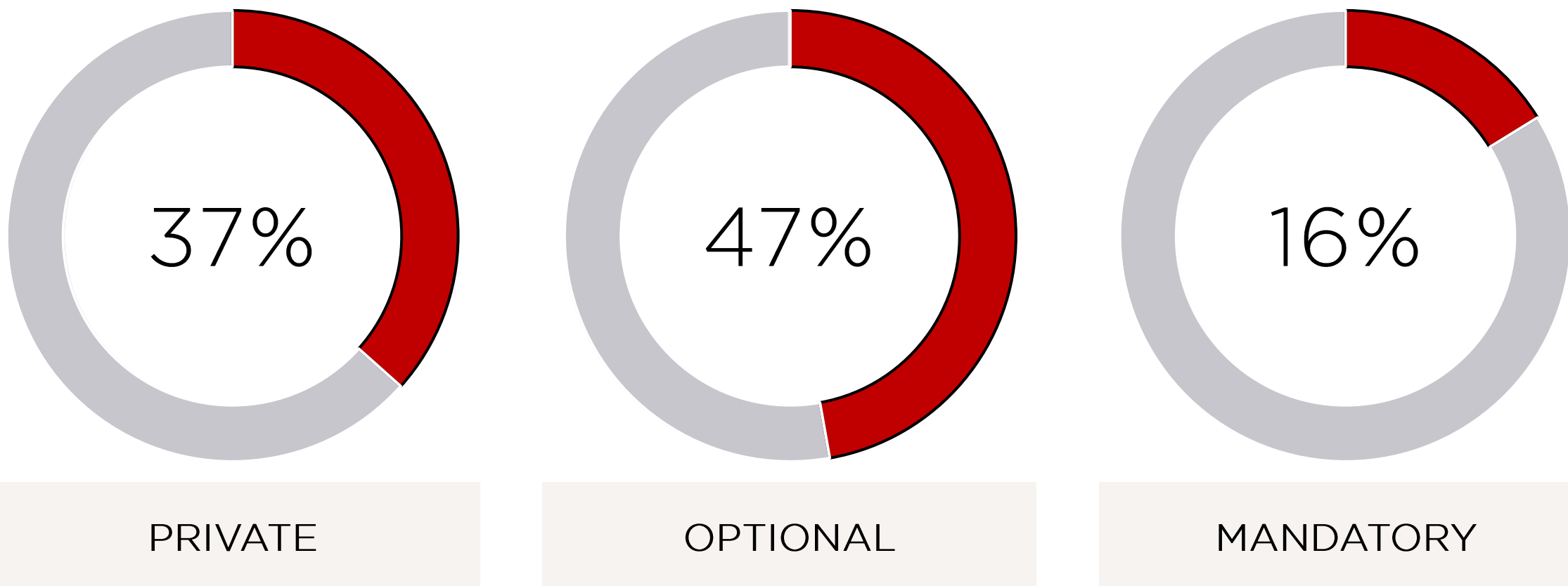
47%

EMERGING CITY

34%

RESORT

27%
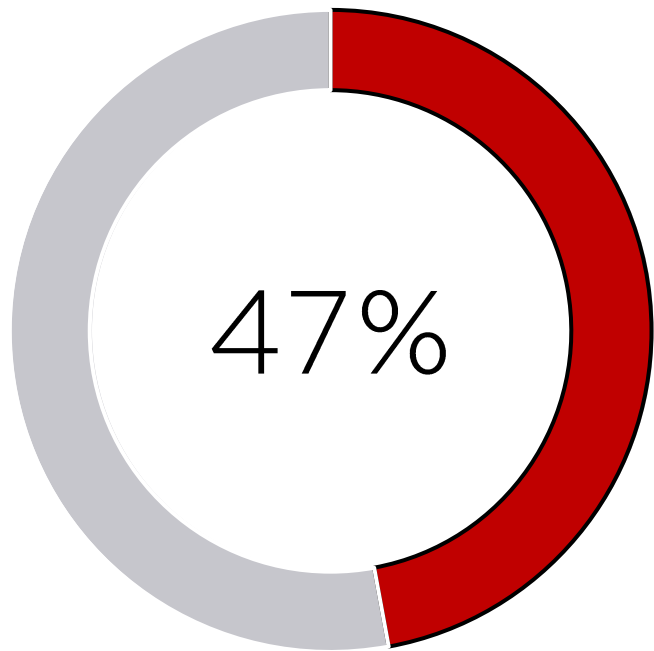
GLOBAL CITY

Global **rental** programs...

Among the features that make branded residences attractive to buyers is the rental program offered by developers and their hotel-brand partners...

37%

PRIVATE

47%

OPTIONAL

16%

MANDATORY

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Global **rental** programs… compared to **MEA**

Among the features that make branded residences attractive to buyers is the rental program offered by developers and their hotel-brand partners… and they differ across regions especially for Asia Pacific.

50%	33%	17%
PRIVATE	OPTIONAL	MANDATORY
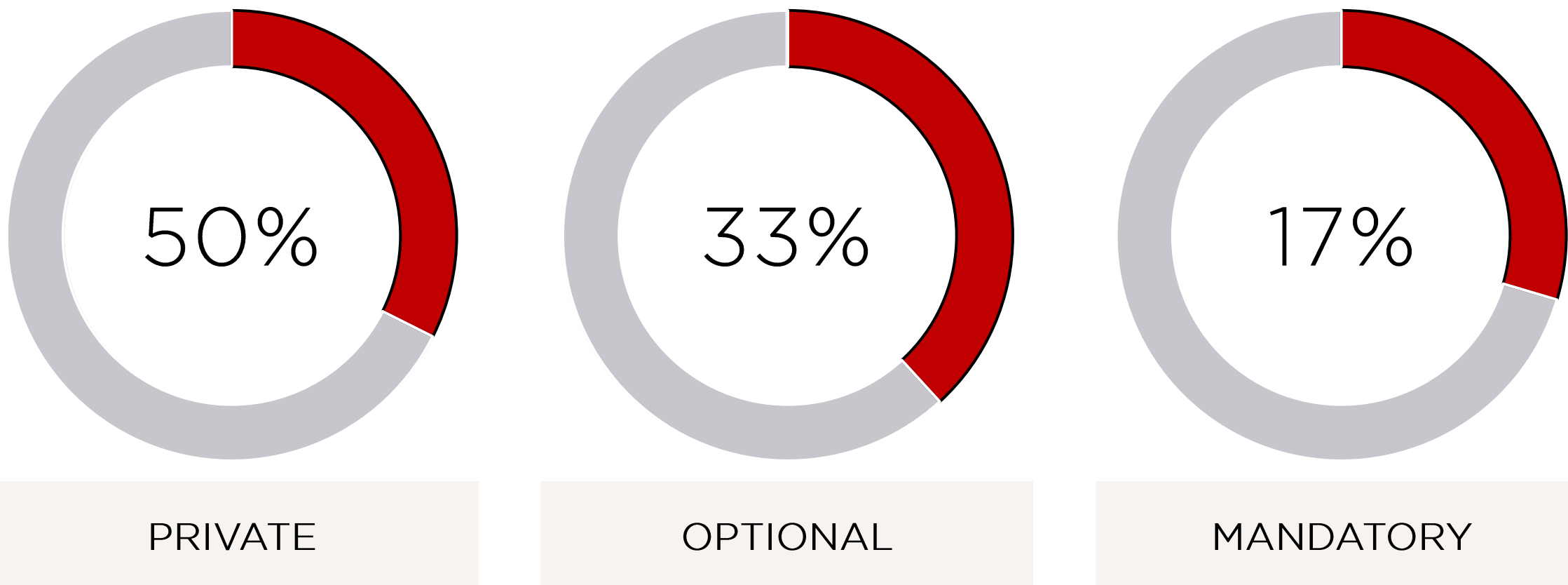
Branded residence <mark>headlines</mark>

Around the world branded residences attract much attention and are reported in headlines that reinforce how successful such developments can be when they are structured correctly.

USD 100 MILLION

MIAMI

USD 65 MILLION

LONDON

USD 112 MILLION

DUBAI

USD 140 MILLION

TOKYO

Observing **trends**

The setting for branded residences remains largely unchanged, as does the structure of such developments, but the real estate industry is being revolutionised by change and no sector is immune.

CHANGING BUYER PROFILES

U/HNWI Profile

Priorities

Chain Scale Evolution

Brand Segment

SUSTAINABILITY

Building Materials

Energy Consumption

Certification & Legislation

DESIGN & TECHNOLOGY

Smart Technology

Convenience

Virtual Reality

Building Management

Bedroom vs. Bathroom

Home Office

HEALTH & WELLNESS

Personalized Fitness

Outdoor Spaces

Sleep Quality

Air Quality

Anti-bacterial

Water Filtration

Our **expertise**

Market Feasibility Studies

- Site & market analysis
- Benchmarking & case study analysis
- Programming & recommendations
- Financial forecasting & appraisal

Brand Premium Studies

- Branded versus non-branded
- Hotel branded versus non-hotel
- Hotel branded versus hotel

Brand Contract Negotiation

- Brand evaluation, and selection
- Commercial term negotiations

Market Intelligence

- Trends in design, technology, sustainability, amenities, services, etc.
- Competitor benchmarking and market share evaluation

Operational Advisory

- Hotel mixed-use integration / operational and commercial efficiency
- Rental program structures
- HOA budgets

- Definitive agreement negotiations
- Contract review & vulnerability assessment

Thank you

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