Battle of the Brokers: Branded Residences

Operational Real Estate Summit

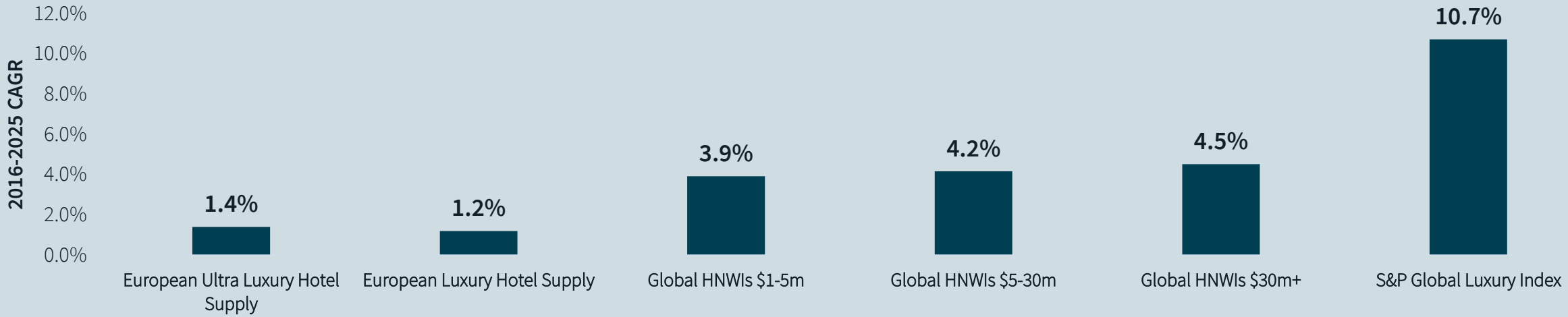
Tuesday 23rd June 2026

Kate Peters, Senior Director, Value and Risk Advisory, JLL

JLL SEE A BRIGHTER WAY



Demand

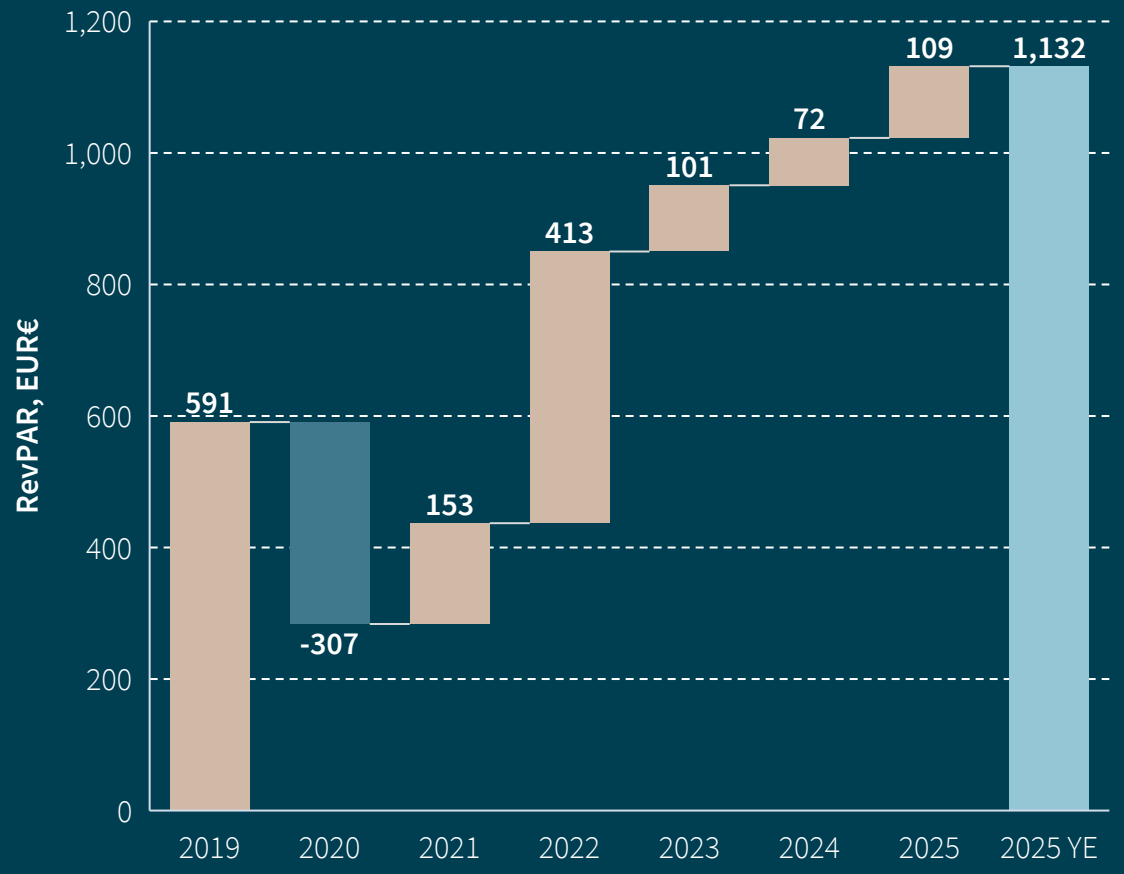


Source: JLL Research, Capgemini, CoStar, S&P Global



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Supply



Source: JLL Research, Capgemini, CoStar, S&P Global
Note: Ultra-luxury RevPAR based on a curated sample of 47 hotels (5,340 rooms) across European markets.

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Creation of Value



The Brand

The Space

The Site

Timing - Why now?



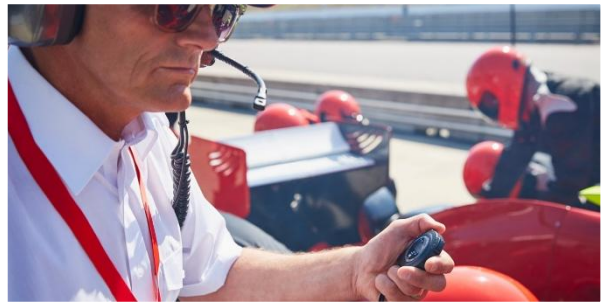
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Value Creation



Timing

JLL

Kate Peters

Branded Residential



Kate Peters MRICS, Senior Director, Value and Risk Advisory, JLL
30 Warwick Street | London | W1B 5NH | M +44 7966 750405 | kate.peters@jll.com