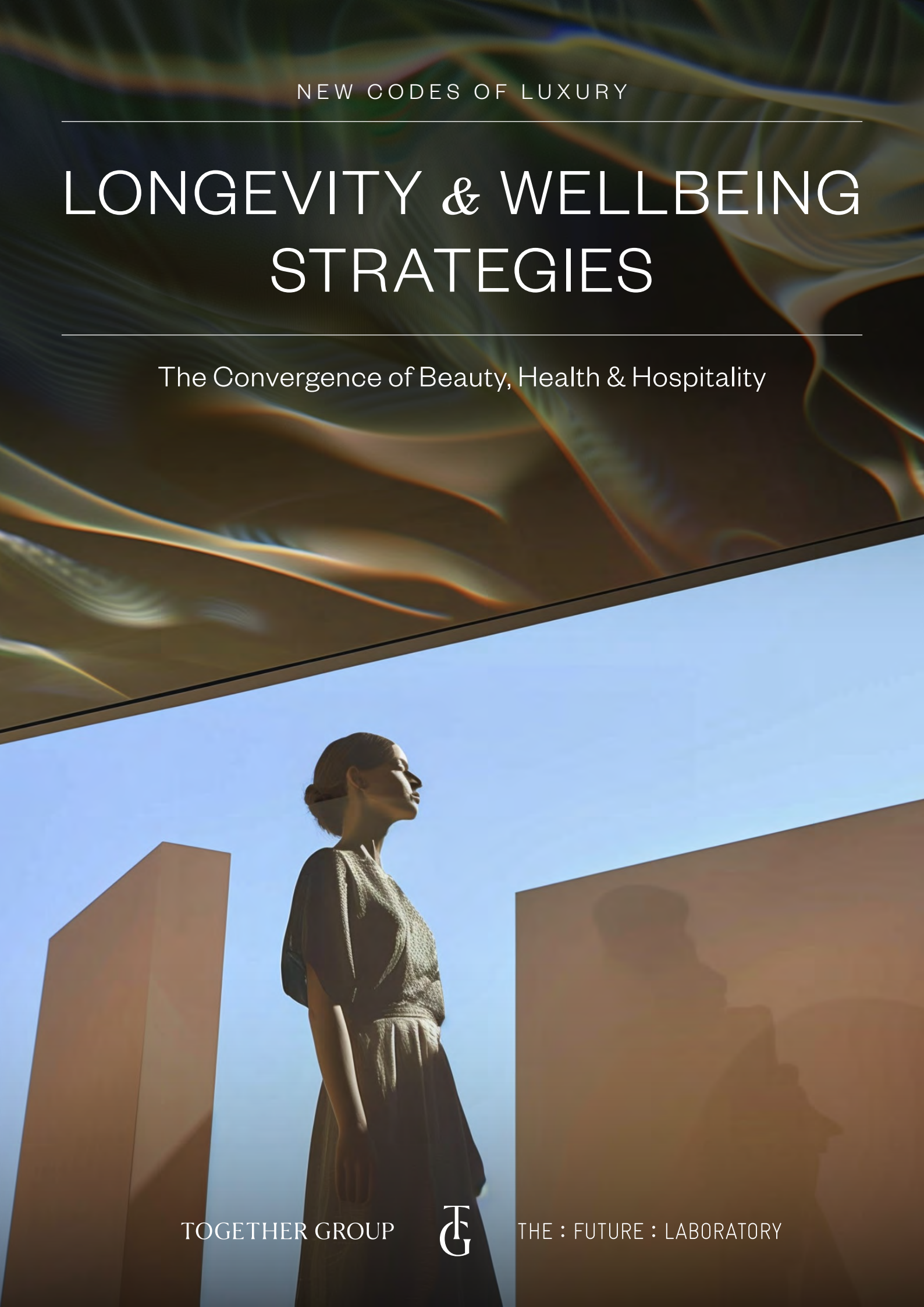
NEW CODES OF LUXURY

LONGEVITY & WELLBEING STRATEGIES

The Convergence of Beauty, Health & Hospitality



TOGETHER GROUP

THE : FUTURE : LABORATORY

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TOGETHER GROUP

Together Group is a curated collective of creative consultancies, technology and production studios, crafting the future of luxury and lifestyle.

We blend creativity, culture and cutting-edge immersive technologies, to create and elevate brands, experiences and destinations of the future.

As of today, the group integrates the capabilities of 13 category-leading specialist houses, with over 650 people collaborating across 20 locations globally.

www.together.group

THE : FUTURE : LABORATORY

The future Laboratory is one of the world's most renowned futures consultancies.

We deliver strategic foresight solutions across a range of products and services including LS:N Global, our online trends and consumer intelligence platform, and via more bespoke strategic foresight services and trend frameworks designed to provide our clients with actionable, profitable and meaningful strategies and solutions.

www.thefuturelaboratory.com

Executive Summary

This report explores the trend that longevity and wellbeing are becoming core to luxury's evolving value proposition, driving the convergence of beauty, health and hospitality under a new paradigm: *Transformational Luxury.*

Rooted in the Transformation Economy – where individuals seek products and experiences that meet deeper human needs and help them lead more fulfilling lives – this approach positions luxury brands as partners in life enhancement by offering consumers a suite of new tools to transform themselves and their lives.

Our analysis highlights a series of cultural shifts, emerging priorities and cross-sector opportunities, alongside the strategic imperatives shaping the new codes of luxury.

Key Findings:

: Longevity and wellbeing as luxury's ultimate proposition

Surging interest in longevity – the Global Wellness Institute estimates the global market will reach £490bn ($610bn) by 2025 – is rewriting the luxury playbook across beauty, health and hospitality. 'The ultimate luxury value proposition is now about extending and enriching our lifespan and wellbeing,' explains Christian Kurtzke, CEO of Together Group.

: Transformational Luxury is redefining traditional values

Consumers increasingly view luxury as a means of achieving self-actualisation and deeper connections. Claus Sendlinger, co-founder of Slow, notes: 'I believe that the future stakeholder (guest) is even more convinced that spending money on a belief system is more important than spending it on a brand.'

: Synergies between beauty, health and hospitality unlock opportunity

As previously distinct sectors merge, multi-layered and synergistic experiences are becoming the new standard – unlocking a new future for brand engagement. Research from GWI (formerly GlobalWebIndex) reveals that 77% of luxury consumers prefer to buy a product or service simply for the experience of being part of a brand's community.

: Hyper-personalisation as a new benchmark of exclusivity

Leveraging health technology and diagnostic tools allows brands to craft tailored solutions. Philippe Zuber, CEO of Kerzner International, explains: 'Our guests own and collect daily data about their health,' which can be integrated into bespoke wellness journeys.

: Purpose-built wellness environments are levelling up luxury hospitality

Wellness real estate is one of the fastest-growing subsets of the £5.1 trillion ($6.3 trillion) wellness economy, which is itself projected to grow at a rate of 7.3% annually to 2028, according to the Global Wellness Institute. Rebecca Burdess, global head of guest experience and services at Maybourne, explains how environments must actively support wellbeing: 'Each of our spaces (at Surrenne) is designed to hold the guest and to deliver a specific feeling or function.'

: Bridging the gap between science, healthcare and hospitality

Luxury brands are uniquely positioned to fill the space between cutting-edge science and conventional healthcare. Sonu Shivdasani, co-founder of Soneva, states: 'The opportunity for luxury hospitality is to bridge the gap and offer clients what they can't get from their local GP or hospital.'

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AI imagery by The Future Laboratory

Part one

INTRODUCTION

The rise of longevity and wellbeing as a core luxury value proposition

AI imagery by The Future Laboratory

- True luxury lies in the power to transform. In 2024,
- a growing focus on longevity revealed a deep-rooted shift: luxury's re-imagining as a pathway to lasting health and wellbeing. As consumers search for personal transformation and meaningful experiences, the sector is evolving into a multi-dimensional space where beauty, health and hospitality merge.



Optimize by Equinox, US

This evolution offers brands the chance to extend beyond lifestyle, delivering solutions that enhance both lifespan and healthspan. Indeed, longevity – a market forecast to reach around £490bn ($610bn) globally by 2025 – has the potential to reshape healthcare, hospitality and investment (source: Global Wellness Institute). The rise of luxury longevity resorts, alongside significant venture capital investment in ageing research, reflect how beauty, health and wellness are being newly perceived and experienced.

'The ultimate luxury value proposition is now about extending and enriching our lifespan and wellbeing, enhancing the quality of life'

Dr. Christian Kurtzke, CEO, Together Group

In recent years, experiences have overtaken objects in the minds of consumers, part of an ongoing move from materialism to experientialism. Changes in cultural values and mindsets – including a heightened, long-term focus on wellbeing – have also renewed consumers' desire for a life well lived. Now, as the experience economy matures, brands are being inspired to catalyse cross-category innovation and offer something more expansive.

Transformational Luxury takes us beyond fleeting experiences to facilitate something more authentic and lasting. Rooted in the Transformation Economy, where individuals seek products and experiences that meet deeper human needs and help them lead more fulfilling lives, it moves beyond curated moments to become a catalyst for personal growth and self-actualisation. In this new paradigm, luxury brands evolve from being providers of goods and services to partners for life.

'We've seen a clear shift from hard luxury products to the world of experiences,' says Christian Kurtzke, CEO of Together Group. 'But we've now reached a critical point where the next step is to operationalise this shift – understanding how brands and destinations can authentically bring these experiences to life across different segments of the luxury market.'

Kurtzke continues: 'At its core, this transformation is about broadening the perspective from luxury defined by material goods – where the emphasis is on the quality of the product or service – to personalised, human-centred luxury experiences centred on longevity, wellbeing and personal transformation. The focus shifts from admiring the craftsmen to how we regenerate, inspire and transform the life of the luxury consumer. Real scarcity today isn't found in rare materials like gold or diamonds, but in something far more valuable: time. The ultimate luxury value proposition is now about extending and enriching our lifespan and wellbeing, enhancing the quality of life.'

'Beauty will be to the luxury industry what fashion has been since the 90s – the driver of change, the benchmark of future expectations'

Chris Sanderson, co-founder and chief creative officer, The Future Laboratory

Being 'well' once meant the absence of illness and ailments, but today it encompasses how well-rounded lifestyles can foster mental, physical, emotional and social fulfilment for both individuals and communities. It also involves assessing how concerns like sustainability and the environment intersect with health.

With the wellness economy valued at £5.1 trillion ($6.3 trillion) and projected to grow at 7.3% annually to 2028, the opportunity is clearer than ever. Wellness real estate – properties intentionally designed to support and improve residents' physical and mental health – is currently one of the fastest-growing sectors in this economy, revealing new frontiers for the future of hospitality.

As beauty brands become more influential in luxury and culture at large, these lines of thinking are equally challenging their traditional, product-led perspective. 'Beauty will be to the luxury industry what fashion has been since the 90s – the driver of change, the benchmark of future expectations,' says Chris Sanderson, co-founder and chief creative officer at The Future Laboratory.

Future luxurians will look beyond markers of status and exclusivity – instead placing value on experiences and solutions that align with their desire for a happier, healthier and longer life. 'The beauty, wellbeing and hospitality spaces have a more natural relationship to this new luxury because they are more human-centred and more personalised in what they can deliver,' Kurtzke adds. 'But in the future, we need to take the spatial experience design in both physical and digital environments to another level.'

In this report, The Future Laboratory and Together Group explore how this next chapter of what we are calling Transformational Luxury will be shaped by its ability to blur traditional boundaries and create all-encompassing modes of engagement.

Part two

DRIVERS OF TRANSFORMATIONAL LUXURY

Why luxury must evolve to meet changing values and needs

AI imagery by The Future Laboratory

- In a world where consumer expectations are
- shifting dramatically, luxury is constantly evolving to remain relevant. Its evolution is driven by a combination of cultural shifts and technological advancements – and now by heightened awareness of wellbeing impacts.

As consumer awareness of longevity and quality of life grows, luxury is being reshaped to address these heightened priorities. More individuals are exploring ways to optimise their health, extend their lifespan and enhance their overall wellbeing – driving a shift in how beauty, health and hospitality brands approach their offerings. Once siloed concepts like wellness-focused spas or fine dining are evolving into more integrated and intentional frameworks that meet these expectations and differentiate luxury brands in a competitive landscape.

‘How are the luxury companies going to tackle that when wellness is now part of the competitive set?’ asks Cindy Palusamy, founder of CP Strategy, a boutique consulting firm focused on concept development for consumer-facing businesses. ‘Anything in the wellness and longevity space is right up there as an alternative investment, because it’s the ultimate investment in many ways.’

Here, we focus on the key shifts shaping how the beauty, wellness and related hospitality industries are conceptualised, developed, categorised and experienced – highlighting the new mindsets shaping the luxury consumer cohorts of the future.



In New York, Modern Age is the US’s first longevity-focused health clinic designed to proactively slow down ageing both inside and out. With a personalised, proactive and comprehensive approach to ageing, its aim is to help its clients to live longer, healthier lives

77%

of luxury consumers prefer to buy a product or service simply for the experience of being part of a brand’s community

Source: GWI

THE TOTAL EXPERIENCE

Luxury is moving from a transactional model to a holistic eco-system of engagement. Today’s affluent consumers demand immersive experiences that actively engage their senses, emotions and intellect. Beyond owning goods, they want to enter curated worlds that resonate on a personal and cultural level. Supporting this, more than three-quarters (77%) of luxury consumers prefer to buy a product or service simply for the experience of being part of a brand’s community (source: GWI).

This Total Experience spans the entire luxury journey – from initial engagement and in-store environments to digital touchpoints and post-purchase interactions. For beauty, it could mean creating immersive retail spaces, elevating the self-service experience with thoughtfully designed products and offering branded wellness services, such as spas or experience centres, that extend well beyond the product itself. Similarly, the emphasis in hospitality is shifting towards delivering seamless, personalised services at every stage.

‘I believe in challenging the status quo of our current business models and I believe that the future stakeholder (guest) is even more convinced that spending money on a belief system is more important than spending it on a brand’

Claus Sendlinger, founder and former CEO of Design Hotels and co-founder of Slow

Flussbad, Berlin, by Slowness, is a campus designed ‘to enable collaboration and innovation across disciplines toward the reimagining of human potential’. At its heart is Reethaus by architect Monika Gogl, a performance, congregation and meditation space designed to create haptic contrast and invoke deep calm

When it comes to beauty, some believe a critical market gap remains. ‘One of the real luxuries of luxury is to go into a physical space and be taken care of,’ explains Kelly Kovack, founder of BeautyMatter. ‘In the US, it doesn’t really exist any more. Department stores here are not a luxury experience.’

Beauty can learn from fashion by re-imagining physical retail and creating holistic, immersive experiences. ‘The beauty industry is following in the footsteps of the fashion industry in terms of its focus on the holistic experience – the focus on everything from the products to the interior to the interaction,’ explains Dena Nahar AlSaud, co-founder and chief creative officer at Motherskies.

Fostering shared belief systems and cultural connections across categories can also elevate luxury beyond tangible goods to platforms for meaningful engagement. Hospitality trailblazers like Claus Sendlinger, founder and former CEO of Design Hotels and co-founder of Slow, are driving this. ‘I believe in challenging the status quo of our current business models and I believe that the future stakeholder (guest) is even more convinced that spending money on a belief system is more important than spending it on a brand,’ Sendlinger tells The Future Laboratory.

Transcending their status as a consumer, guest or visitor, luxury cohorts will continue to recast themselves as curators and collectors of values and experiences. As they search for a new breed of luxury that offers more than siloed categories, brands will need to increasingly carve out white spaces between culture, lifestyle and hospitality.

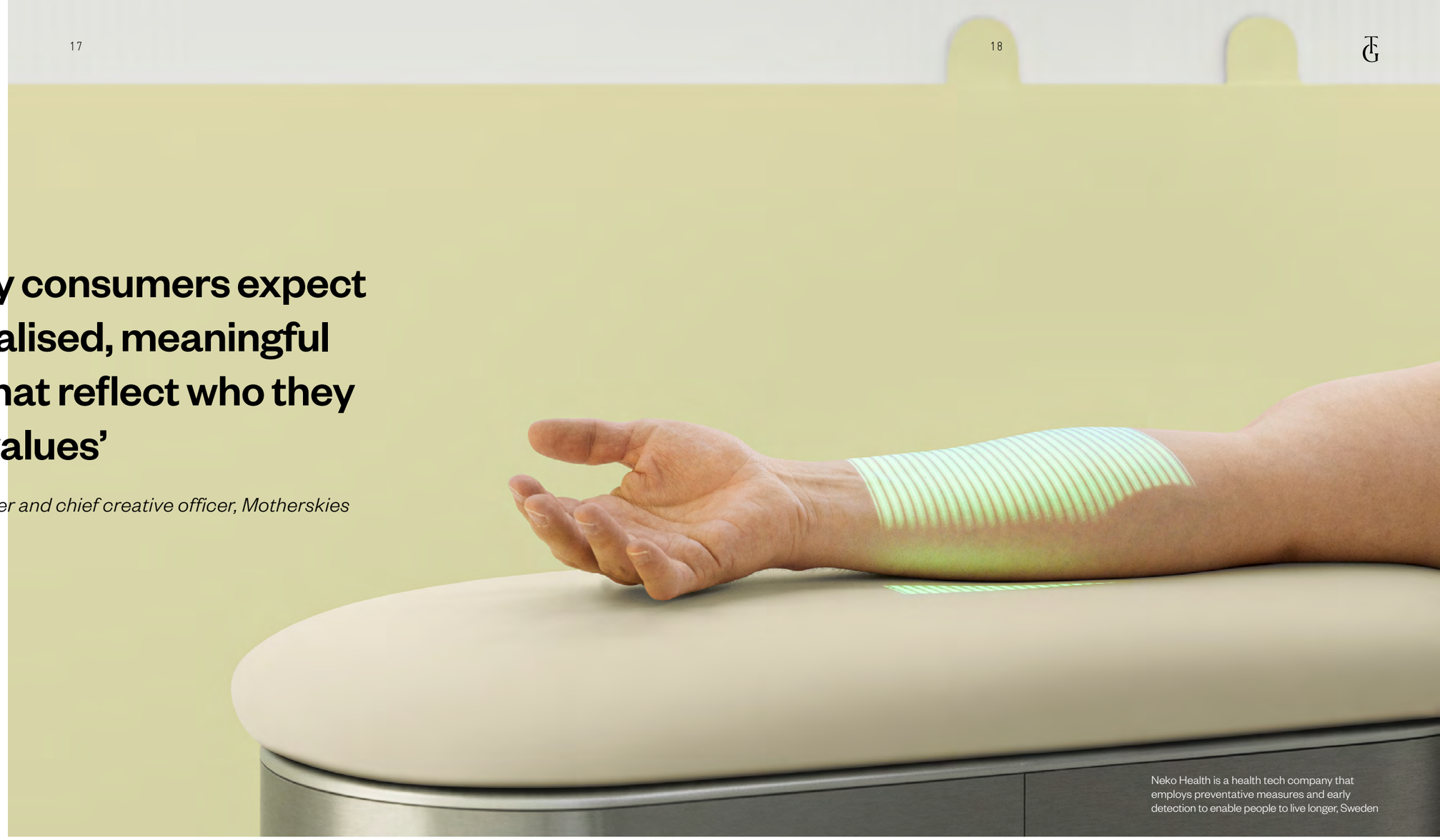




Reethaus by Slowness. Photography by William Russell, Germany

‘Today’s luxury consumers expect hyper-personalised, meaningful experiences that reflect who they are and their values’

Dena Nahar AlSaud, co-founder and chief creative officer, Motherskies



Neko Health is a health tech company that employs preventative measures and early detection to enable people to live longer, Sweden

PRESTIGE PERSONALISATION

Traditional luxury may have traded on a currency of rarity, but today’s luxury consumers are prioritising selection over scarcity – seeking products and experiences that match their personal needs and values. For these cohorts, luxury extends beyond acquiring what few can have. Instead, it is about finding what uniquely suits them, especially in a health context.

‘Today’s luxury consumers expect hyper-personalised, meaningful experiences that reflect who they are and their values,’ explains Nahar AlSaud. Indeed, 57% of consumers say they will spend more on a brand that personalises experiences (source: Twilio). This highlights the growing importance of customisation as a cornerstone of contemporary luxury. McKinsey & Co’s reporting further supports this, citing that 71% of consumers expect personalised interactions with brands, and three-quarters would switch to a competitor if their expectations are not met.

Personalisation is future-proofing the luxury guest experience by fostering a stronger connection between brands and individuals. From bespoke health plans in luxury wellness retreats to hyper-individualised skincare regimens, brands are starting to leverage advanced technologies and customer insights to craft truly tailored experiences.

For Philippe Zuber, CEO of Kerzner International, data is also central to this shift. ‘The fundamental change, which we are just at the beginning of, is the fact that our guests own and collect daily data about their health,’ he explains. Indeed, some 66% of Gen Z and 40% of other generations use health and wellness fitness trackers to monitor their health (source: World Economic Forum). Advances in health technology, including wearables, AI-driven analytics and advanced diagnostics, are powering the hyper-personalisation of the future wellness experience.

Rebecca Burdess, global head of guest experience and services at luxury hotel group Maybourne, echoes this idea: ‘Guests today want their physical and digital experiences to be intrinsically linked. They quite rightly expect that once they have shared their data, we are going to to use it in a way that is useful, relevant and helpful to them.’

This is beginning to unlock new opportunities for resorts and beauty brands to develop and deploy health technology, medical devices and bespoke digital apps to not only gather relevant data, but also to leverage that data to deliver a personalised experience. According to Kathleen Baird-Murray, contributing beauty editor at British Vogue, the value here is not just personalisation, but having a personalised relationship with people. ‘Brands need to learn to reward the time consumers commit to engaging with their brands by personally committing time back,’ she says.

THE ART OF BECOMING

Modern luxury is pivoting from material scarcity to time, quality and human-centred craftsmanship as its new currencies. ‘The scarcity of luxury is no longer about the rare materials that go into making products,’ observes Together Group’s Kurtzke. ‘It’s more human-centred, both in terms of how luxury products and experiences are being created, and also how they are received – the transformation they deliver to consumers on a human level.’

Almost two-thirds (61%) of customers want brands to help them feel and experience more intense emotions, according to Wunderman Thompson. This reflects a growing societal focus on fulfilment over fleeting gratification. The implications for luxury beauty are significant, with surface-level aspirations traded for a more well-rounded vision of beauty and health. In other words, evolving from narrowly defined categories to holistic, transformative experiences.

61%

of customers want brands to help them feel and experience more intense emotions, according to Wunderman Thompson



Charlotte Tilbury Cryo-Recovery Face Mask, UK

The notion of ‘self’ is now more important than ever within luxury. As highlighted by Burdess: ‘It’s incredible how quickly the idea of self has become intrinsic to people. Notions of self-actualisation and self-optimisation are now mainstream. This has now permeated the general mindset – not specific to a type of customer, a type of guest or even a generation.’

This quest for transformation is even redefining traditional concepts of value. In the APAC region, 58% of affluent consumers describe time as a greater luxury than money (source: Vice Media Group). Meanwhile, within the beauty sector, 50% of global consumers now define beauty as ‘looking healthy’, reports Euromonitor.

Whether it is through hospitality that fosters introspection or offerings that encourage long-term personal growth, the art of becoming represents a transformational new paradigm for luxury – and one that aligns with the evolving values of today’s consumers.

SCIENCE AS THE STANDARD

No longer content with vague promises, luxury consumers are demanding measurable outcomes, scientific validation and transparency from the products and services they invest in. This is transforming luxury into a sector increasingly marked by precision and innovation.

‘We are speeding into the age of the expert. For beauty and wellness, this equates to research, testing, proof points and facts that will foster understanding, trust and positive sentiment among audiences’

Martin Raymond, co-founder of The Future Laboratory

Where beauty, wellness, luxury and hospitality intersect, savviness among consumers is rising. Brands themselves are observing the change. ‘Our consumers have evolved more in the past three years than in the 30 years prior,’ says Stéphane Lannuzel, Beauty Tech programme director at L’Oréal – putting this shift firmly into perspective. Consequently, trust in science has never been higher, with the Edelman Trust Barometer reporting that 75% of people globally rank scientists as their most trusted source of information.



SIRO One Za’abeel, Dubai

‘We are speeding into the age of the expert,’ says Martin Raymond, co-founder of The Future Laboratory. ‘For beauty and wellness, this equates to research, testing, proof points and facts that will foster understanding, trust and positive sentiment among audiences.’

The burgeoning longevity sector is emerging as a new driver of luxury. For affluent consumers, the desire to extend both their lifespan and healthspan is now fuelling a blossoming market for precision health and life-extension services. At a business level, investing in the age of longevity is still an emergent theme, but it has clear promise. By 2050, one in three people will be over 60 years old, according to World Bank data – hinting at major demographic shifts to come.

As crossovers between beauty, health and hospitality accelerate, advanced research is blending with luxury experiences to deliver unprecedented value. ‘The body is not only holistic, it’s science-based,’ explains Zuber. ‘Instead of having a purely holistic approach to the massage delivered by a therapist, for example, we need to start by having a scientific approach.’ Such an evolution signals a future where sector-agnostic collaboration will be essential to success as science sets a new benchmark for next-generation luxury consumers.

Part three

TRANSFORMATIONAL TRENDS

New opportunities in luxury beauty, health and hospitality

AI imagery by The Future Laboratory

- Influential trends are intersecting to create
- new paradigms for experiences, wellbeing and innovation. In this section, we outline some future directions set to chart luxury's course by blending insights from case studies, future-facing expert commentary and emerging data. Each reveals how brands can strategically respond to the drivers previously identified in this report.

Together, these trends map out a blueprint for navigating a rapidly changing market. They reveal opportunities for brands to collaborate and expand their offerings in ways that are meaningful to today's luxury consumers – whether through immersive beauty eco-systems, hyper-personalised health models or spaces designed to nurture wellbeing.

REBALANCING THE NEW BEAUTY EQUATION

To remain competitive in an increasingly crowded luxury market, beauty brands must go beyond aesthetics and embrace a 360-degree approach that balances measurable performance with personal, emotional and cultural significance. By positioning beauty as both a scientific and a spiritual pursuit, brands can deliver deeper, more meaningful connections with consumers.

Beauty is no longer defined by rigid ideals but is shifting towards an adaptable and immersive vision. Brands that treat beauty as a dynamic eco-system – blending sensory-driven retail spaces, advanced formulations and storytelling – will succeed in building long-term loyalty. 'Beauty has been inundated with venture capital, but it's been about driving top-line revenue, rather than building heritage brands,' says Kovack, emphasising the need for a more thoughtful, sustainable approach.

$40bn

The expansion of beauty's definition is fuelling the luxury beauty market, which McKinsey predicts will double to reach $40bn by 2027

In this context, experimentation is key. The expansion of beauty's definition is fuelling the luxury beauty market, which McKinsey & Co predicts will double to reach £31.7bn ($40bn) by 2027. For forward-looking brands, this presents an opportunity to redefine their offerings, with products becoming gateways to multi-layered experiences.



Prada Beauty in collaboration with Ines Alpha and Lynsey Alexander, Italy

Fragrance, in particular, illustrates beauty's evocative potential. It is now emerging as a wellness modality in its own right, offering functional benefits alongside sensory pleasure. Brands like Vyrao are leading the way by creating fragrances designed to evoke specific emotions. 'Fragrance is unique because it is able to unlock that imagination,' notes Baird-Murray. 'It is able to unlock what people are craving: warmth, comfort, nostalgia, feeling grounded.' Liberty's Fragrance Lounge reflects this shift by transforming scent shopping into a curated journey of discovery, organised by scent families rather than brands, and the auras and energies of scent.

In the digital realm, brands are also finding new ways to engage. Prada's collaboration with digital artist Ines Alpha exemplifies how luxury beauty can merge physical craftsmanship with virtual innovation, creating a future-facing aesthetic that is both aspirational and accessible.

Beauty brands must also prioritise scientific credibility. 'From the product side, a lot of beauty companies are trying to leverage longevity science in a topical format,' explains Palusamy. By aligning their offerings with the latest in regenerative science, brands can cater for consumers' growing interest in health-driven beauty. Palusamy cites Estée Lauder's Skin Longevity initiative as a model for integrating research into product development.

Finally, expert partnerships are becoming critical to building trust. Dior's appointment of Sarah Akram as its skincare expert underlines the importance of professional expertise in shaping product innovation and consumer education. These collaborations help reinforce authenticity, a key differentiator in a market where efficacy is now top of the agenda.

What this means: The future of beauty lies in moving beyond isolated categories to create integrated platforms for self-expression and foundational health. By investing in innovations that bridge beauty's scientific and emotional dimensions, brands will empower consumers to engage with them on a more personal, transformative scale.



Vyrao Perfumes, UK



Soneva, The Maldives

Sonu Shivdasani: *on the future of luxury hospitality*

For Six Senses founder and Soneva co-founder Sonu Shivdasani, the future lies in offering integrative wellbeing experiences. 'It's about taking the best of ancient wisdom and modern science and bringing them together in a way that makes sense for the guest – that's really our objective,' he explains.

'Luxury consumers are redefining their expectations of luxury, which is so much around their own requirements, their personalisation and their wellbeing,' says Shivdasani. At Soneva, this approach involves blending traditional healing practices such as Ayurveda and yoga with advanced medical treatments like cryotherapy, vitamin IV drips, stem cell therapy – and in the future, potentially even psychedelic-assisted therapies, if regulations allow. Ensuring authenticity in its wellness offering, Soneva only hires yoga practitioners who have lived in ashrams and view yoga as a way of life.

Shivdasani sees luxury hospitality as uniquely positioned to deliver these offerings in an environment that ensures both comfort and safety. 'Luxury hotels are very good at that – they have a super-strong service ethic,' he says.

Reflecting on how guest expectations have evolved, he adds: 'Our guests are so much more sophisticated around wellness than they were 10 years ago, and that's why we can offer integrative medicine, and people go for it.' Looking ahead, he highlights the critical role luxury hospitality can play in advancing health: 'The opportunity for luxury hospitality is to bridge the 20-year gap between what cutting-edge science knows and what conventional healthcare offers.'

BUILDING MEMBERSHIP WELLNESS MODELS

Luxury brands are turning to membership models to create exclusive wellness communities that blend curated services with a sense of belonging. These models provide not only health-centred experiences but also foster deeper connections among affluent consumers, who are seeking a holistic definition of wellbeing.

To succeed, brands must craft aspirational third spaces that deliver bespoke wellness experiences alongside opportunities for meaningful social engagement. 'The blurred lines between hospitality and wellness are making consumer experiences more genuine – the connection between brands and people, more genuine,' says Nahar AlSaud. For beauty brands, this approach also offers new distribution opportunities. 'These wellness concepts may become new distribution points for luxury beauty brands, because luxury beauty brands don't really have points of distribution right now,' observes Kovack.

Notably, Soho House has expanded its wellness and beauty offerings by blending community and health. After venturing into skincare with its Soho Skin line – using the bedrooms in its clubs and hotels as test kitchens to gather member feedback – Soho House plans to open an advanced wellness experience at Soho Farmhouse in 2025. This will offer holistic and longevity treatments, a second pool, three covered padel courts and Pilates studios tailored to its members. By aligning its wellness innovations with its membership model, Soho House is responding to growing demand for experiences that are both individualised and socially tied.

Remedy Place, the world's first social wellness club, provides another view on this. Its flagship space in West Hollywood offers artfully designed interiors that promote healing and connection – redefining what it means to engage with health services. Beyond its aesthetic appeal, Remedy Place caters for members' social and physical needs by creating an environment that fosters meaningful relationships alongside treatments like infrared saunas, IV drips and sound baths.

The Well in New York City – a members-only blend of private gym, organic restaurant, health consultation and full-service spa – is another entrant



Hyperbaric Chamber Treatment Room at Surrenne, UK

into the nascent high-end, health-focused members' club market. Along with an array of luxury wellness amenities and artfully designed interiors, membership includes monthly health coaching, dinners and workshops.

Taking exclusivity to another level, Surrenne at The Emory in London combines luxurious wellness with cutting-edge science. Opened in April 2024, this private members' club is priced at £10,000 ($12,000) annually, plus a £5,000 ($6,000) joining fee, and is reserved for hotel guests and members only.

'Our guests, our members, are incredibly well informed. They are highly qualified, they are well read, and they understand the world of health, wellbeing and longevity. And of course, they're very invested in their own health and wellbeing'

Rebecca Burdess, global head of guest experience and services, Maybourne

Backed by a scientific advisory board led by Dr. Mark Mikhail, Surrenne offers bespoke longevity treatments that combine hospitality with high-performance wellness services. This approach positions Surrenne as the gold standard in integrating luxury, science and membership-based community.

Brands embracing this model can deliver science-backed, curated experiences alongside the intangible value of belonging to an exclusive community. As membership wellness gains traction, it presents opportunities for luxury brands to create hubs of innovation that offer not just health services but also environments designed for connection, restoration and personal growth.

What this means: Looking ahead, the next evolution of membership wellness will focus on ultra-personalised care and the integration of physical, emotional and social wellbeing. Future third spaces will blend tailored wellness services with exclusive social experiences, positioning brands as essential partners in the pursuit of holistic living.

One Za'abeel – *The Urban Resort*

Breaking new ground is Dubai's One Za'abeel, a mixed-use development in downtown Dubai which includes a One&Only urban resort hotel, a Clinique La Prairie Longevity Hub and SIRO, a fully integrated fitness and recovery hotel. Its seamless integration of elite sports science into hospitality reflects the luxury sector's deepening focus on functionality and performance. Every aspect of the hotel is designed in collaboration with wellness experts to support guests in an elite-level experience including training, recovery and nutrition.

'In the future, the wellness providers that are going to succeed are not those able to deliver experience, but the providers which have the best innovation in terms of longevity'

Simone Gibertini, CEO, Clinique La Prairie

SIRO will provide services ranging from master trainers to bespoke meal plans and thermoregulation-enhancing cooling mattresses, along with remedial treatments such as cryotherapy, red light therapy, dry needling and sports massage. 'We have a strong fundamental belief that the guest is in control,' explains Zuber of Kerzner International, which is known for its trailblazing approach to hospitality and owns the SIRO brand. 'So, they know what they want. They know what they don't want. And then our unique opportunity was to build up programmes and pillars that the guests can go and select from'.

As part of the development's One&Only offer, Clinique La Prairie has opened a Longevity Hub, a membership and guest facility devoted to a distilled programme featuring the brand's signature three-step assessment process of diagnosis, personalised treatment and ongoing follow-up.

This is vital, believes CEO Simone Gibertoni, if emerging hospitality-meets-medical facilities specialists are to cater for the clients' expectations for self-improvement as well as simultaneously delivering a luxurious and satisfying experience. 'There is a tension that sits at the heart of the growth of transformational luxury. The culture of the hospitality industry and that of the hospital are completely different. A GM is there to serve the client; the doctor is there for a completely different reason. Longevity operations have to balance these two cultures.'

One Za'abeel, Dubai

DESIGNING FOR WELLBEING

Luxury is moving beyond superficial wellness offerings to embrace a new standard where design becomes an active health modality. This approach recognises that physical spaces, when carefully designed, can actively support mental, emotional and physical wellbeing. Within hospitality especially, wellness is starting to extend beyond the siloes of hotel spas and gyms, and into the more end-to-end approach of delivering experiences throughout the guest journey.

'With the wellness market expanding in size and shape, there's a significant opportunity for brands to tap into emotional frequencies to deliver on specific health outcomes'

Olivia Houghton, deputy creative foresight editor, LS:N Global

Across value propositions, multi-sensory engagement has become key, with leading brands curating elements such as scent, sound and tactile design to evoke specific states. 'There's a huge shift towards meaningful experiences – those multi-sensory moments that really enrich one's soul first, and then everything else,' notes Nahar AlSaud. This holistic approach is helping brands move from offering luxury amenities to delivering wellness-orientated environments.

'Everything at Surrenne is filtered through the lens of our scientific advisory board,' explains Burdess. 'Obviously, there are extraordinarily beautiful spaces, and the physicality of these spaces is very immersive, but each of the spaces is designed specifically to hold the guest within them, and with a specific feeling or function in mind.'

Biophilic design is also central to this new wellness paradigm. By integrating natural elements into interiors, brands can create environments that feel restorative and grounding. Aman Beverly Hills, opening in 2027, merges Californian botany with luxury hospitality to provide a serene retreat within an urban setting. Consumer interest in design supports this evolution, with Pinterest reporting a 90% increase in searches for 'wellness retreat aesthetic' between 2023 and 2024.

Elsewhere, beauty brands are innovating by designing experiences that merge cutting-edge skincare with emotional immersion. Tying into this, Skin Pple in Singapore offers facials that evoke sensory journeys – like stargazing or rainbow chasing – while still addressing complex skin concerns. These offerings show the extent to which science and creativity are converging to create functional yet unique experiences

Once niche recovery rituals such as infrared therapy and ice baths are becoming baseline expectations within luxury hospitality. As Sendlinger explains: 'The infrared and the ice bath will, in the future, be in all the big suites because all of these consumers are already starting to have that stuff in their homes. This just becomes like brushing their teeth and taking a shower. They become hygiene factors. If you're not providing services that are a part of my daily routine, you might not be the choice of this consumer.'

Architectural boldness is another tactic luxury brands are employing to enhance wellness experiences. At SHA Mexico, the building is designed to resemble human DNA. Located near Cancún with views of a coral reef, the centre offers treatments ranging from gene therapy to shamanic rituals like temazcal ceremonies – showing how a mix of advanced medicine and cultural tradition can complement the sector's growing focus on blended modalities.

What this means: At its core, this strategy emphasises experience as medicine – an approach where luxury environments are designed not just to please the senses but also to deliver therapeutic, life-enhancing benefits. By embedding wellness into every touchpoint, from architecture to personalised rituals, luxury brands can offer experiences that truly transform the mind, body and spirit.

Dr Dieter Resch: *on Longevity and the Mayrlife Philosophy*

For Dr Dieter Resch, Mayrlife Altaussee resort in Austria is built on a single guiding principle: 'Health is luxury today because it's the most precious thing you can have.'

Mayrlife's holistic approach focuses on helping guests achieve long-term health through lifestyle changes and tailored treatments. 'The philosophy of Mayrlife is to make our guests more healthy in the long term. It's a lifestyle issue,' explains Resch. 'We customise the food you eat, what you drink and your lifestyle plan. Every guest in our restaurant has a different menu, tailored to their needs.'

'Health *is* luxury today because it's the most precious thing you can have'

Guests embark on a transformative journey during their stay, which averages 12 days. 'You have to learn to listen to your body, often for the first time in your life. It can be challenging, and by the third or fourth day, guests often begin to feel renewed,' notes Resch.

Mayrlife's longevity philosophy also incorporates insights into the mind-body connection. 'Serotonin, the happiness hormone, is produced in your gut. So, we employ psychologists as part of the programme because it's as much a mental issue as it is a nutritional one,' he adds.

This approach equips guests with the knowledge and habits to sustain health beyond their visit: 'The right way is to change your lifestyle and to know what is the right food for you and your body.'

Mayrlife Medical Retreat, Austria



SHA, Mexico

INTEGRATING LONGEVITY PROGRAMMING

Longevity is reprogramming luxury. Luxury wellness brands are merging traditional hospitality offerings with tailored health experiences designed to extend both lifespans and healthspans. As science transforms luxury brands across beauty, fashion and hospitality into purveyors of next-level health, affluent consumers' expectations for personalised wellness are finally being met with real utility.

To lead in this arena, brands must adopt an integrated approach across all functional services in hospitality. This involves shifting away from siloing parts of the guest experience such as F&B, spas and rooms, and instead offering fully program, personalised customer journeys. Every touchpoint should contribute to a unified, wellness-driven experience that blends nutrition, fitness, recovery and rest.

The Mandarin Oriental in Geneva demonstrates how longevity science is reshaping hospitality. Partnering with Switzerland's private sleep medicine centre CENAS, the hotel offers guests overnight polysomnographic tests to diagnose sleep disorders. After analysis by medical experts, guests receive practical advice to help optimise their rest and energy levels – delivering a health-driven luxury experience that extends beyond the walls of the hotel.

For Shivdasani, this focus on sleep reflects an important shift in acknowledging how health and wellbeing outcomes truly take shape. 'The most important aspect of cognitive health is sleep,' he explains. Lots of retreats now offer sleep programmes because sleep is such an important component of overall wellbeing. The night is a cleanser; it's the non-REM sleep that does the cleaning up and good sleep is very important for cognitive health.'

In the beauty sector, Dior Spa Cheval Blanc in Paris is pioneering certified health and longevity treatments. Its latest development, the Light Suite, uses advanced LED technology inspired by light therapy to rebalance energy and sleep cycles. Dior Science has further cemented its longevity expertise by launching an international scientific advisory board dedicated to reverse-ageing research, uniting dermatologists, ethnobotanists and psychologists to push the boundaries of regenerative beauty.

Luxury wellness brands are also incorporating biohacking techniques to meet the rising interest in life extension. Driven by consumer demand for advancing health solutions, the global biohacking market – valued at £13bn ($16bn) in 2021 – is projected to grow at a CAGR of 20.4% through to 2030 (source: Nova One Advisor). Equinox Fitness has already tapped into this market with Optimize by Equinox, a personalised longevity programmed priced at £32,500 ($40,000) annually. This programme integrates over 100 lab tests and personalised coaching from experts like Dr Mark Hyman to deliver health optimisation as a premium service.

Residences – and branded residences – are slowly becoming an extension of hospitality. The upcoming SHA Wellness Clinic island, scheduled to open in 2026, is set to become the world's first healthy living island. Located half way between Dubai and Abu Dhabi, this development blends luxury residences with 24/7 health-optimisation services. Residents and guests will have access to SHA's signature treatments, reflecting a first-of-its-kind convergence of hospitality, real estate and longevity science.

What this means: As the longevity movement continues to build momentum, it will advance beyond treatments into complete eco-systems for life extension. Brands must shift their approach by integrating diagnostics, personalised services and precision medicine across all touchpoints – creating a suite of life-enhancing experiences and environments.

Part four

STRATEGIC IMPERATIVES

Creating the new codes of luxury

AI imagery by The Future Laboratory

- In this chapter, we focus on the strategic
- interpretation of this report's findings. Together, these eight imperatives offer a roadmap for navigating the white spaces that exist between beauty, health and hospitality.

As beauty, health and hospitality blend – and as wellbeing and longevity become central to luxury's value proposition – brands must rethink how they design experiences and engage consumers. This era of convergence will redefine the new codes of luxury.

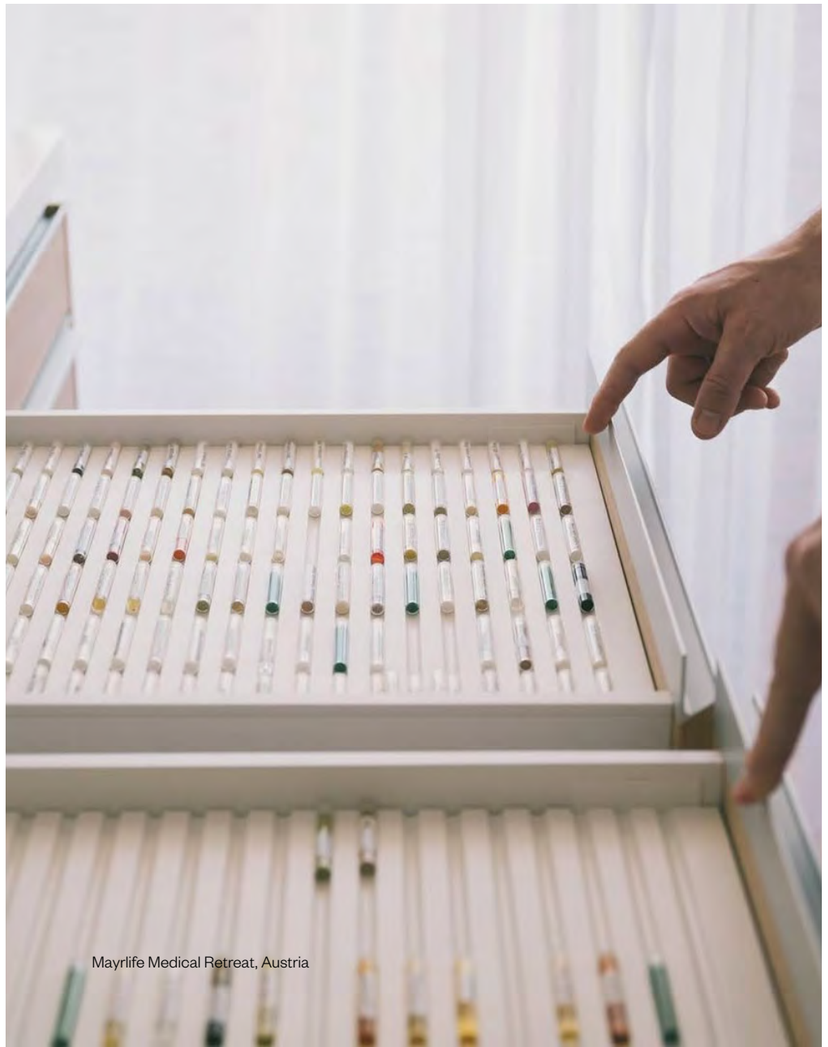
By rethinking their approaches to categories and experiences, luxury brands can not only meet the heightened expectations of their audiences, but also create offerings that feel personal, enduring and transformational. From building unified eco-systems of engagement to designing deeply personal and emotionally elevated experiences, they mark a shift towards brands and consumers co-creating a new definition of what it means to live and thrive in the luxury space.

'Our main competitor is time. Our affluent client has to decide, 'should I stay one week inside the clinic or should I go to my boat?' And that's our real competitor'

Simone Gibertini, CEO, Clinique La Prairie

1. Longevity and wellbeing as tenets of luxury

Luxury is no longer defined by rarity of material goods but by personal transformation, wellbeing and extended vitality. As longevity and wellbeing become the ultimate value proposition, luxury brands across all sectors – including fashion, beauty, hospitality and property – must embrace this shift and reframe their offerings accordingly.



Mayrlife Medical Retreat, Austria

2. The holistic redefinition of beauty

Beauty is no longer about aesthetics alone. Instead, it now encompasses mental, physical and emotional wellbeing. Brands must reposition beauty as a holistic wellbeing solution by designing experiences that nurture the body, mind and soul – aligning with consumers' demand for deeper, transformational engagement.



AI Imagery by Jessica Smith



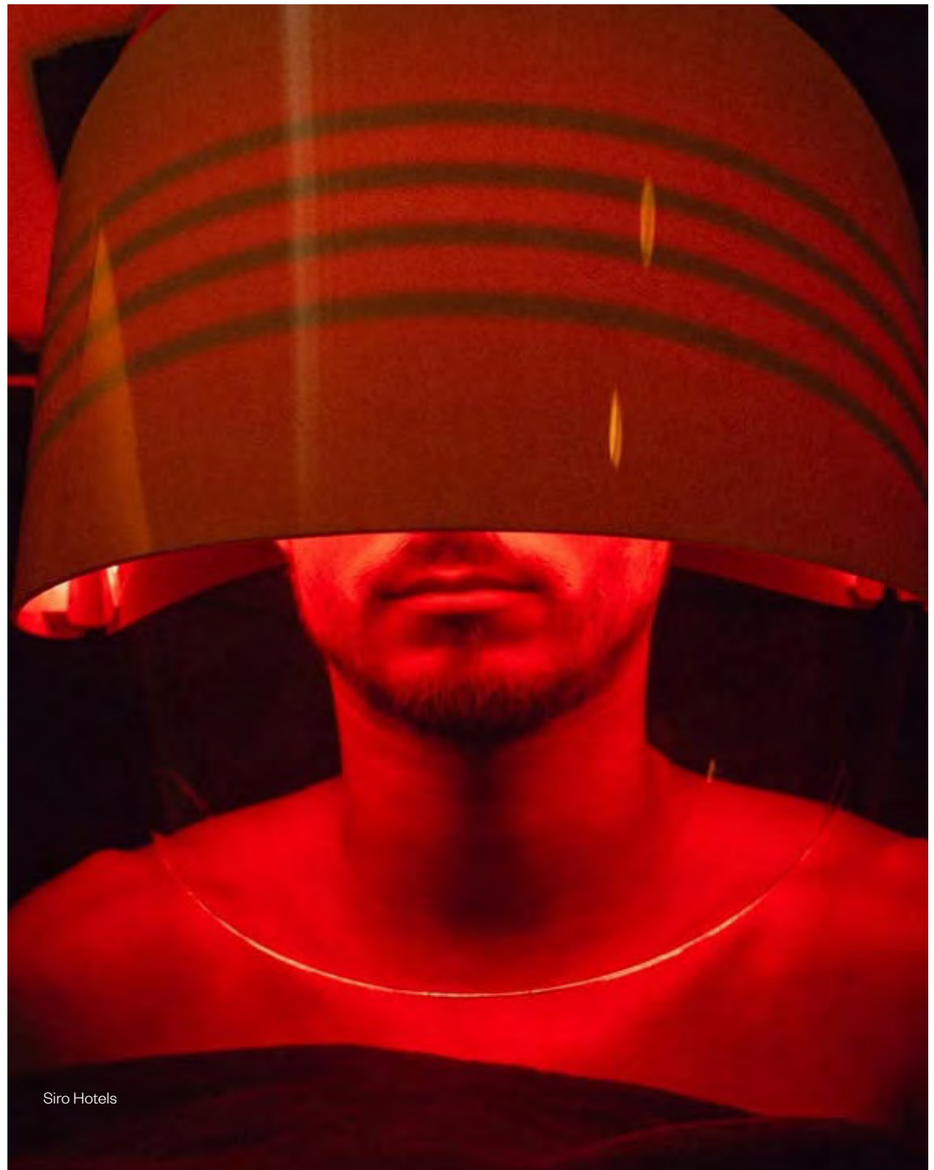
Tracy Anderson at Surrenne Studio, UK

3. From products and categories to experiential eco-systems

As consumer expectations rise, luxury brands must evolve from offering isolated products or services to building integrated experiential eco-systems. Whether through physical environments like spas and wellness spaces or digital platforms, these eco-systems should deliver regenerative and transformational experiences.

4. The convergence of beauty, health and hospitality

The boundaries between beauty, health and hospitality are dissolving, creating new opportunities for cross-sector innovation. To lead in this era of crossover, brands must adopt integrated strategies that deliver wellbeing journeys which combine beauty rituals and longevity programmes and protocols with hospitality-led experiences.



Siro Hotels



Neko Health, Sweden

5. Data-driven personalisation

Personalisation underpinned by data is a defining element of this new luxury. Brands should leverage health data and advanced diagnostics to offer bespoke, measurable wellbeing solutions that reflect the individual. This data-driven approach will not only enhance personalisation but also build trust by demonstrating tangible impact.



Aescape, US

6. End-to-end wellbeing programming

Luxury is moving from generalised offerings towards hyper-personalised programming. Brands must evolve into experiential providers, delivering integrated, tailored health, wellness and beauty solutions across the entire consumer journey. By embedding bespoke programmes into every touchpoint – from spas and fitness to dining and beauty treatments – luxury brands can create well-rounded, end-to-end experiences.

7. Immersive spatial design as a wellbeing driver

In luxury's future, physical spaces will become platforms for wellbeing. Brands must adopt a conscious approach to spatial experience design, creating purpose-built and personalised environments – spas, kitchens and social hubs – that foster personal regeneration and meaningful social connections. This applies across all touchpoints, from hospitality venues to beauty retail.



AI imagery by The Future Laboratory



Zulal Wellness Resort by Chiva-Som Serenity, House of Wisdom

8. Competitive edge through collaboration

The future of luxury lies in collaboration. Challenger brands have a unique opportunity to differentiate by redefining traditional luxury concepts while established players can enhance their value proposition by forming deeper partnerships, such as integrating beauty into hospitality or creating wellness-driven real estate. Success will come from cross-sector synergies and co-creation of new luxury experiences.

‘You can have surgery; you can swallow pills. But it’s not the right way. The right way is to change your lifestyle and to know what is the right food for you and your body’

Dr Dieter Resch, CEO, Mayrlife Altaussee

Part five

CONCLUSION

What's next for Transformational Luxury?

AI imagery by The Future Laboratory

- The coming together of previously siloed sectors – such as beauty adopting hospitality principles or hospitality embracing regenerative health – has created new opportunities for both innovation and differentiation. Whether introducing immersive storytelling, leveraging health data or exploring the intersection of emotional and physical wellbeing, the luxury sector has a chance to rewrite its codes.

Longevity and wellbeing are no longer aspirational ideals but central to the future of luxury. Across beauty, health and hospitality, this convergence is redefining how value is delivered to consumers. It is not enough to provide exceptional products or spaces; the new imperative is to integrate them into eco-systems of experiences that inspire, regenerate and deliver tangible benefits.

This shift demands a new mindset. Luxury is more than transactional, or even rooted in material good. Instead, it is a platform for transformation. Data-driven, bespoke programming will underpin this shift, guiding consumers through spaces and experiences that are precisely calibrated to meet their needs. Purpose-built environments, from spas to kitchens and social hubs, will serve as the stage for these interactions, blending science with design to create meaning and measurable impact.

The way forward is clear: the future of luxury is about elevating life itself. By focusing on what is fundamental to human fulfilment – health, purpose and connection – brands can move beyond traditional boundaries, offering consumers not just services but solutions that shape their lives in profound ways. This summarises our vision for a luxury sector grounded in health, longevity and human connection.

‘We’re only now beginning to realise that *we* are our most valuable asset. It’s you. It’s not the house. It’s not the car. It’s not your partner; it’s *your* body’

Philippe Zuber, CEO, Kerzner International (SIRO)


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