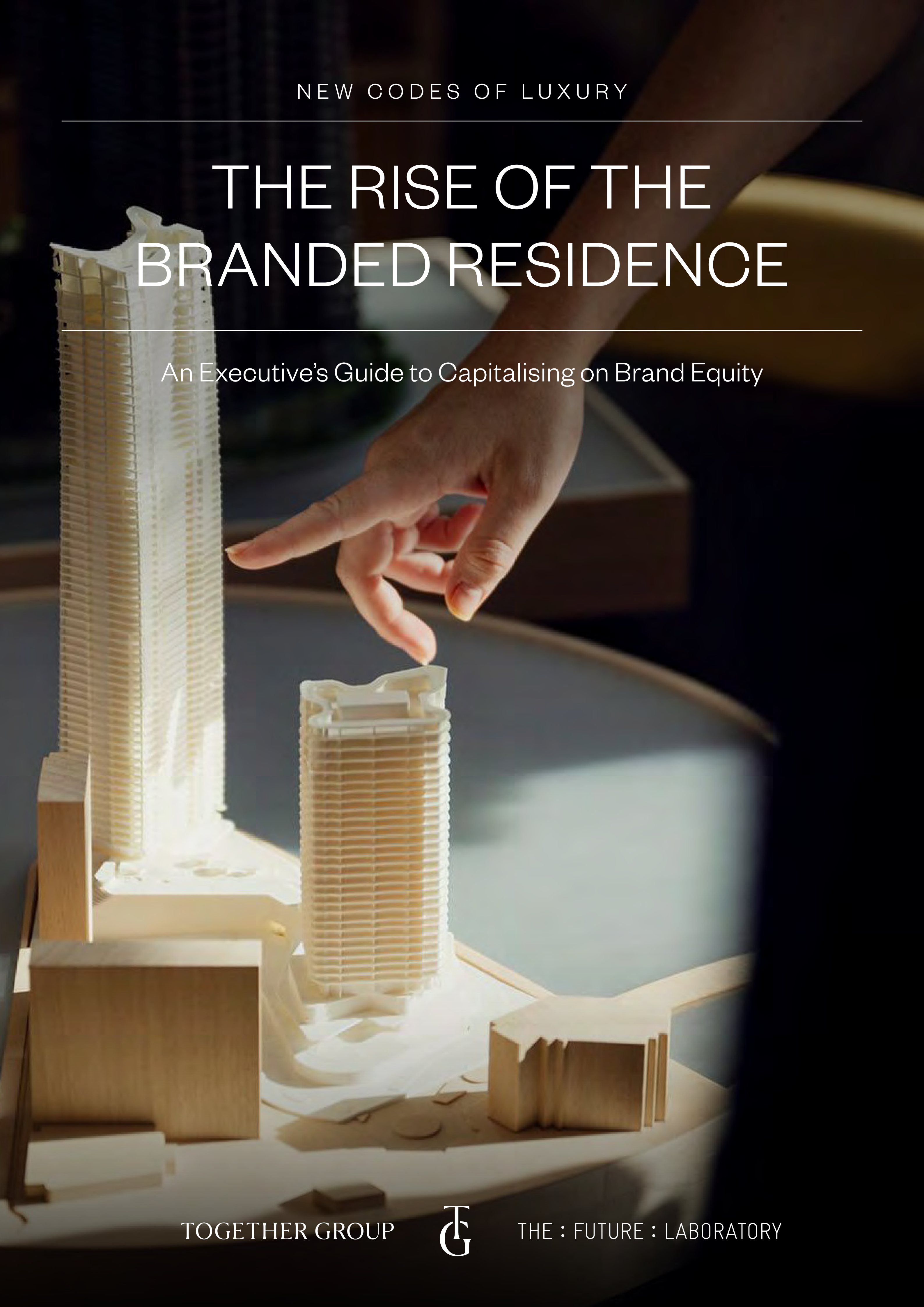
NEW CODES OF LUXURY

THE RISE OF THE BRANDED RESIDENCE

An Executive's Guide to Capitalising on Brand Equity



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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 15 category-leading specialist houses, with over 700 people collaborating across 20 locations globally.

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The Future Laboratory is one of the world's foremost strategic foresight consultancies. Our trends intelligence partners get exclusive access to innovator and early adopter behaviours that are driving change across pivotal lifestyle sectors - including Luxury and Retail, Fashion and Beauty, Health and Wellbeing, Travel and Hospitality, Food and Drink, Property and Placemaking, Tech and Innovation, Pop Culture and Media.

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Foreword

The branded residences market is developing at pace. From just over 300 schemes in 2015, the sector nearly tripled in size in a decade, and is expected to almost double in size between 2025 and 2035, according to Savills. It grew 19% in 2025 alone, with 39 new hotel brands and 19 new non-hotel brands entering the market. Fashion houses, automotive marques and lifestyle brands are all staking a claim, signalling that branded residences are becoming a primary arena for luxury brand expression, not a secondary one.

This comes at a time when the definition of luxury is undergoing a structural recalibration – from an economy of product to one of immersion; from a culture of ownership to one of experience, community and optimised wellbeing.

Between 2026 and 2035, whole new categories are set to emerge as next-generation luxury consumers – led by HNWI Gen Zs – prioritise brands that reflect their passions and interests. Entertainment, gaming and sports, wellness and longevity, sustainability and tech, and art and culture will all come to the fore as buyers search for deeper purpose and authenticity. This is not a cyclical trend, but a permanent rewiring of the codes that govern desire, status and brand affinity – a defining, irreversible moment that demands strategic action.

While other reports have charted the market's trajectory from a property asset perspective, none have addressed the strategic imperatives for the brand executive. This report fills that gap, examining why luxury brands are creating branded residences and how they are making them successful.

The brands that will win are not those that simply sell properties, but those that bring their true brand values to life – creating a meaningful sense of purpose, place and partnership. The future of the branded residence is not about property; it is about building ecosystems of value that extend beyond the transaction and deeper into lifestyle. This represents the single greatest opportunity for luxury brands to extend relationships with HNWIs beyond selling personal luxury goods.

The window for first-mover advantage is already closing. We have learned from what has and hasn't worked to create a best-practice playbook that helps brands manage the opportunity and risk of luxury living projects across their entire lifecycle, while meeting the expectations of the next generation of investors.

For the brand leader – whether from luxury hotels, restaurants, fashion, jewellery, beauty, wellbeing or sports and lifestyle – this report is an essential guide to grasping the opportunity of branded residences and future-proofing your brand for the decades ahead.

Experts

The Future Laboratory and Together Group would like to extend their thanks to all those who shared their time and insights with us to help create this report:

: Ben Whattam
marketing director, Bentley Motors

: Shafi Syed
global head of hotel development, Equinox

: Lindsay McGinn
global vice-president of brand advisory, Accor One Living

: Jenni Benzaquen
global senior vice-president of residential, Rosewood

: Charlie Walsh
global head of residential sales, Maybourne

: Dean Main
founder and CEO, Rhodium

: Brett Gregory-Peake
managing partner, Liaison

: Martin Raymond
co-founder and editor-in-chief, The Future Laboratory

: Natalie Caetano
managing director, Noë & Associates

: Tim Gosman
global head of strategy, Noë & Associates

: Mark Noë
founder and CEO, Noë & Associates

: Dorian Vee
co-founder and CTO, Imerza

: Richard Danks
executive vice-president of lifestyle for EMEA, Purple PR

Part one

THE OPPORTUNITY

Why luxury brands must pay attention to the branded residences opportunity

Thebe Magugu Suite at Mount Nelson demonstrates how luxury brands can create residential-style value through cultural storytelling and design authorship, South Africa

The State of the Market

Bulgari Lighthouse, developed by Meraas in partnership with Bulgari Hotels & Resorts at Jumeirah Bay Island, Dubai

The branded residences market has seen rapid innovation and growth during the past decade, a trajectory projected to continue at an increasing pace into the 2030s and beyond.

The Global Map

What started as hotel residences in the 1980s, and developed into a largely US-based investment asset class focused on property, has evolved into a truly global industry that maps where HNWI luxury consumers are spending their time. The sector has nearly tripled in size since 2015, according to Savills. Knight Frank projects a further 59% growth in global developments by 2029. Established and emerging destinations now offer distinctly different opportunities for brands.

North America
The Benchmark Market

Branded residential was born in New York, and North America **accounts for 260 completed projects and 116 under development**. Miami has become the world's most active market, with 48 completed and 55 pipeline developments powered by global buyer trust and favourable tax status. Despite the US's global market share being **expected to drop to 25%** by 2031, it remains the proof-of-concept market where genuine lifestyle differentiation is required.

Central & Latin America
The Resort Market

Central and Latin America's emerging branded residence market held a **5% share globally** in 2025, but this is expected to increase, with **89% growth** anticipated through 2030. Mexico's Riviera Maya and Los Cabos are world-class resort hubs blending sustainable and luxury living, while Brazil's São Paulo adds metropolitan depth with around 30 completed and pipeline projects. Here, ecological ambition and aspirational living converge.

Europe
The Prestige Market

Europe has **more than 140 completed schemes** and its market is expected to **grow by 113%** to more than 300 developments by 2032. Limited space and difficult planning laws in cities like London and Paris mean Europe's market is defined by scarcity and heritage. Architectural transformation rather than new-build density sets the tone. For brands, this is where cultural credibility is conferred rather than created – entry is hard, success is lasting.

Africa
The Frontier Market

Africa is the most nascent branded residentials market. Project numbers in MENA are expected to **rise by more than 270%** heading to 2031, as Africa's HNWI population is projected to **grow by 17.8%** through to 2028. Cairo leads with an **850% rise** in branded schemes forecast by 2031, while Marrakech's cultural mystique gathers momentum. For pioneering brands, Mauritius' Indian Ocean exclusivity, South Africa's wine-country and Tanzania's safari wilderness put the frontier advantage firmly on the table.

Middle East
The Growth Market

The MENA region is the fastest-growing market, having **grown by 187%** over the past five years, with increased **growth of 270%** expected up to 2031. Dubai alone holds 64 completed projects and 87 in the pipeline, while **growth of 1,500%** is projected in the Saudi Arabia market through to 2031. For brands, the Middle East is the single largest opportunity window – vast in scale, government-backed and accelerating at rapid speed.

Asia-Pacific
The Emerging Market:

Asia-Pacific's **10.5% growth in wealth** in 2025 was the highest of any global region – and the branded residences sector is following that wealth. The market has **grown by more than 55%** over the past five years, and the number of branded residences is expected to **increase by 180% until 2031**. Growth is projected across China, Vietnam, Thailand, India, Singapore and Hong Kong. The APAC region rewards brands willing to culturally tailor their proposition for diverse, fast-moving local markets.

Driving Exceptional Value Creation: The Premium Effect

Ultimately, luxury is about exceptional value creation. The price premium consumers are willing to pay for branded residences – and mixed-use developments that merge branded living with hotels, restaurants, retail and culture – is strong evidence that brand equity translates directly into hard real estate value. The global average premium for branded residences sits at 33% according to Savills, rising significantly in specific locations and with prestige brands. This premium reaches 87% in Abu Dhabi and 64% in Dubai, while Armani Beach Residences command 63% above comparable Palm Jumeirah schemes, and Aman-branded residences attract 30–50% premiums over non-branded luxury properties, for example (sources: CBRE, CNN and Knight Frank). This reflects the strong desire among HNWIs to live within the branded lifestyle ecosystems of the brands they trust and value.

The Non-hotel Inflection Point

Branded residence strategies have become an integral part of the growth plans of leading hotel groups. However, the most significant structural shift in the market now is the rapid incursion of non-hotel brands. Around 17% of new schemes are now backed by non-hotel brands, a figure that's projected to rise to 20% in the coming years. In 2025 alone, 19 new non-hotel brands entered the market, including Chelsea FC, Barneys New York, ELLE and Karl Lagerfeld (source: Knight Frank and Savills). This signals that branded residences are no longer a hospitality asset class: they are a luxury brand asset class.

Looking ahead, the opportunity widens considerably. Gaming, sports franchises, luxury wellness and longevity brands, and cultural institutions each represent credible new entrants – aligning residential living with the identity-driven values of the next generation of HNWI buyers.

Key Takeaway :

The booming branded residences market has evolved from a US hospitality derivative into a global cultural category in its own right. The future of the industry will be shaped by luxury brands with genuine equity whose differentiated residential offers enhance buyers' lifestyles, while providing demonstrable benefits and outcomes.

Armani Beach Residences at Palm Jumeirah, developed by Arada in partnership with Armani Casa, Dubai

Why Brands are Moving into Residences

AI imagery by The Future Laboratory, UK

Given the convergence of brand equity and luxury living, the strategic imperatives for entering the market are becoming clearer. But why now, and what specific forms of value are brand leaders capturing?

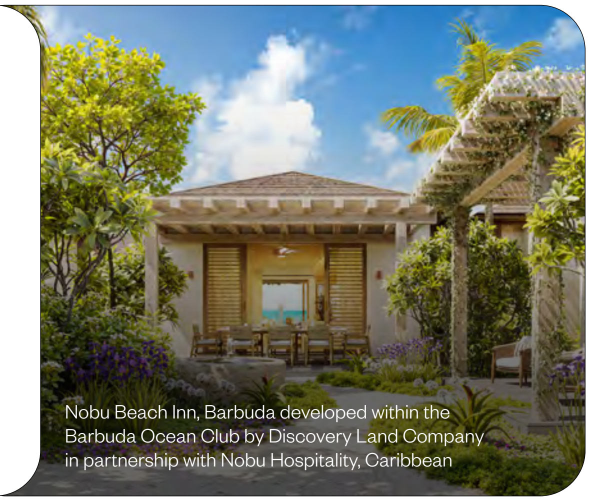
Noé & Associates

New Revenue Architecture

Branded residences generate revenue streams absent from traditional brand business models: licensing fees from developers, revenue-sharing arrangements, long-term royalty structures and ancillary income from branded services and amenities (see part 6.4 for more). 'License fees earn the brand substantial cash flows over several years, relative to their necessary spend, which are pure profits,' says Dr Christian Kurtzke, group CEO of Together Group. 'Such healthy returns are particularly attractive when margins in the core business get under pressure.'

Cultural Authority and Placemaking

The most ambitious branded residences are no longer apartments – they are cultural destinations. In contrast to experiential brand activations that offer newness and attraction through spectacle, these destinations need to deliver experiential value for decades to come. 'The essence of real estate goes beyond mere structures; it's fundamentally about creating a sense of community and connection,' says Trevor Horwell, CEO of Nobu Hospitality. 'The Nobu brand has consistently showcased its brand power, community strength, lifestyle premium, and, most importantly, customer loyalty through branded real estate.'

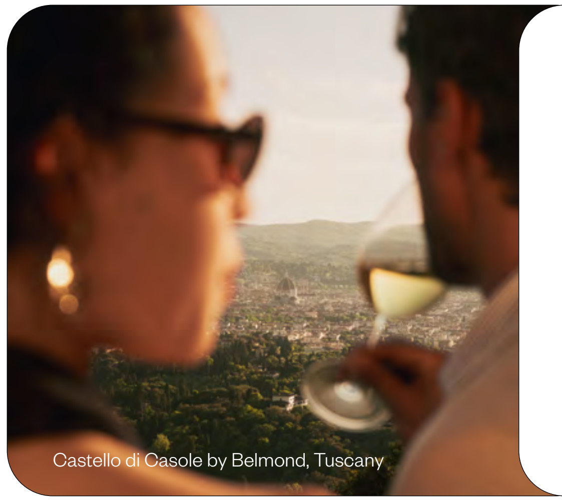


Nobu Beach Inn, Barbuda developed within the Barbuda Ocean Club by Discovery Land Company in partnership with Nobu Hospitality, Caribbean

Porsche Design and Ananda Development debut Asia's first Porsche Design Tower in Bangkok

Brand-equity Extension into Experiential Luxury and Lifestyle

Branded residences extend a brand's world into the most intimate context possible: the home. For luxury brands built on aspiration, this is the ultimate immersion – the resident does not merely own a product, they inhabit the brand. 'The real value lies in the ongoing experience and daily programming that continues long after the purchase is made,' says Shafi Syed, global head of hotel development at Equinox.



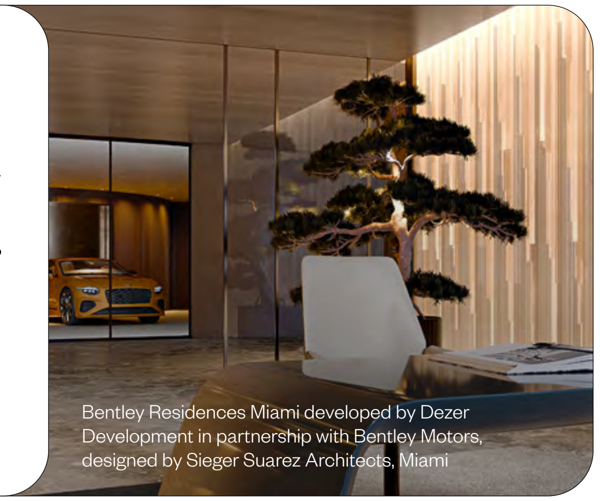
Castello di Casole by Belmond, Tuscany

Audience Ownership at the HNWI Tier

Branded residence buyers are among the world's most valuable audiences: HNWIs, global nomads and multi-property owners seeking experiential luxury beyond traditional products. 'The opportunity lies in deepening the relationship with the HNWI consumer – a group increasingly difficult to reach through conventional marketing,' says Brett Gregory-Peake, managing partner at Liaison. 'That daily proximity builds a depth of loyalty, advocacy and emotional connection that no campaign can manufacture.'

Long-term Asset and Legacy Value Creations

Branded residences exist for decades, creating opportunity and risk in equal measure. For brands with a heritage narrative, a residence is a physical expression of permanence, craft and legacy – one that outlasts any creative director or commercial cycle. 'The ability for our products to endure time is core to our brand,' says Ben Whattam, marketing director at Bentley Motors. 'Branded residences are an extension of our product offering – their values of quality, craftsmanship and legacy have to be inherent.'



Bentley Residences Miami developed by Dezer Development in partnership with Bentley Motors, designed by Sieger Suarez Architects, Miami

Key Takeaway :

Branded residences are more than a lucrative licensing opportunity. They represent a strategic vehicle for transforming a brand from a purveyor of goods into the architect of a complete lifestyle, securing deeper, more permanent relationships with the highest-value audience tiers.

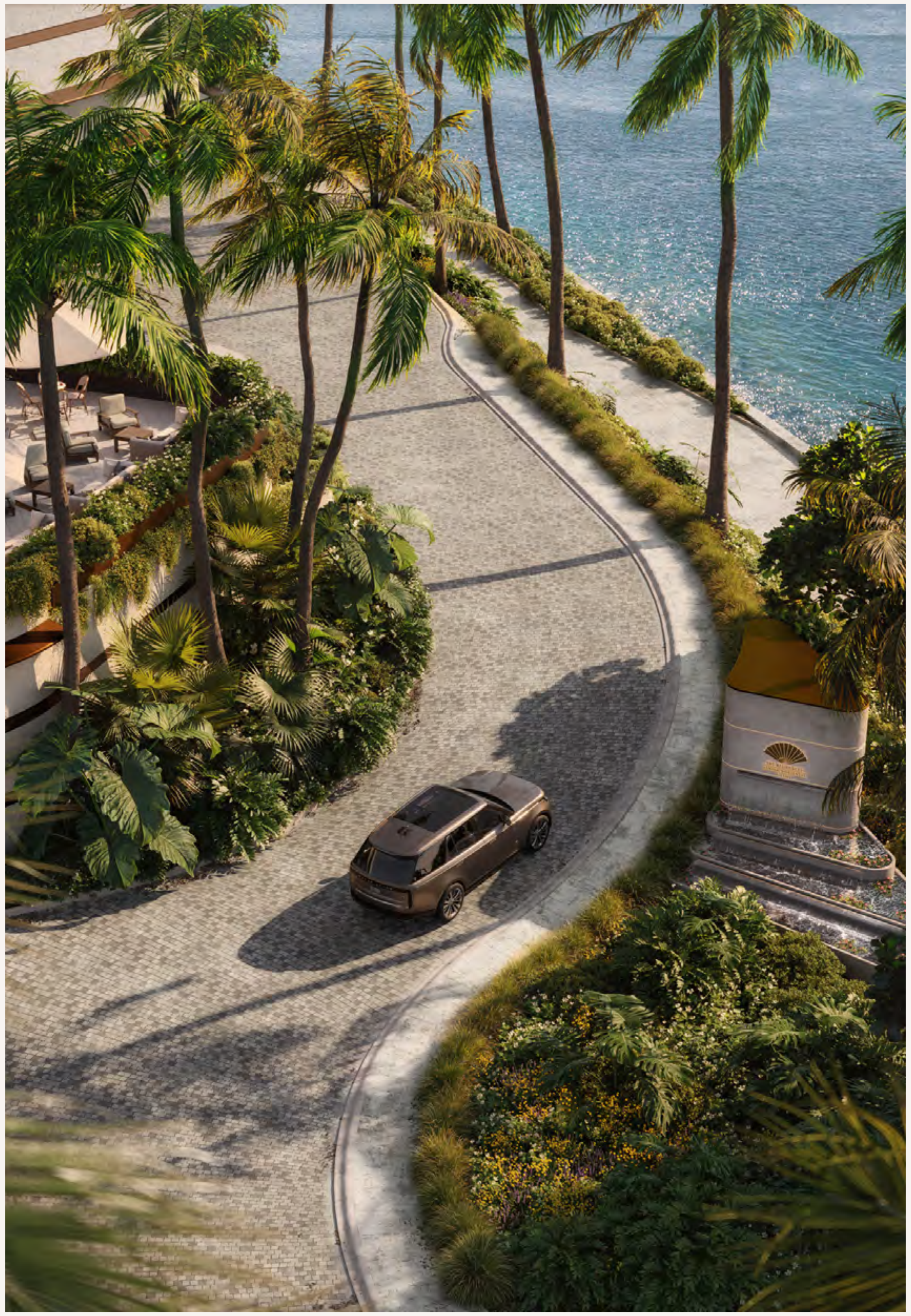
Part two

THE RIGHT APPROACH

What successful branded residences now look like and require

Noë & Associates

From Brand to Lifestyle Platform



The Residences at Mandarin Oriental Miami in partnership with Noë & Associates

During the last half century, the trajectory of branded residence propositions has continued to evolve in step with the expectations of HNWIs, as outlined below.

1980s

Hotel Residences

The first hotel-led residential concepts formalised a new real estate category: residences managed and branded by luxury hotel operators. These offered owners hotel-grade services – concierge, housekeeping, security and room service – as a permanent lifestyle rather than a transient stay. The defining moment was Four Seasons' first branded private residences in 1985, before major hotel groups embraced the model as a repeatable, scalable business.

1990s–2000s

Gateway Cities

The 2000s represented the sector's first true globalisation moment. Buoyed by a surging global economy, rapidly expanding wealth pools and the emergence of new luxury destinations – particularly in Dubai and the wider Middle East – branded residences transformed from a niche US-centric product into a global asset class. At the same time, the brand premium was established.

2010–2020

Lifestyle Brand Entry

Fashion houses (Armani, Versace, Missoni), celebrity chefs (Nobu, Cipriani), and automotive brands (Porsche, Bugatti, Aston Martin) entered the sector. This transformed branded residences from a hospitality-adjacent product into a broader luxury lifestyle category — one no longer defined by service delivery alone, but by cultural identity and the aspirational worlds that luxury brands had spent decades building.

2020–present

Destination Ecosystems

The most ambitious projects now integrate hospitality, culture, wellness, retail and digital infrastructure. Branded residences shift from property to curated living ecosystems, with brands becoming the organising logic of entire neighbourhoods — orchestrating the lifestyle of HNWIs and driving spending on individual and community wellbeing across every dimension of daily life at that single physical location.

Present–2035

Luxury Placemaking and Global Lifestyle Platforms

Branded residences will function as digital-physical ecosystems for global HNWI nomads, wherever they are. As brand communities extend beyond physical residences, digital twins and AI-managed operations will unlock worldwide luxury placemaking capabilities for brands, allowing them to engage, inspire and serve consumers across global networks.

Key Takeaway :

The branded residences evolution from service amenity to integrated lifestyle platform is reaching its conclusion. Brands entering the sector today are doing so at a mature inflection point where the demand for identity and community offers the most fertile ground for growth.

The Value Equation

Having highlighted the evolution of the branded residence into its current guise, it is essential to understand each of the constituent parts of a successful residence, which makes up the placemaking ecosystem.

The Surrey Residences, New York explores a design-led branded living approach through its collaboration with Noë & Associates

The Placemaking Ecosystem

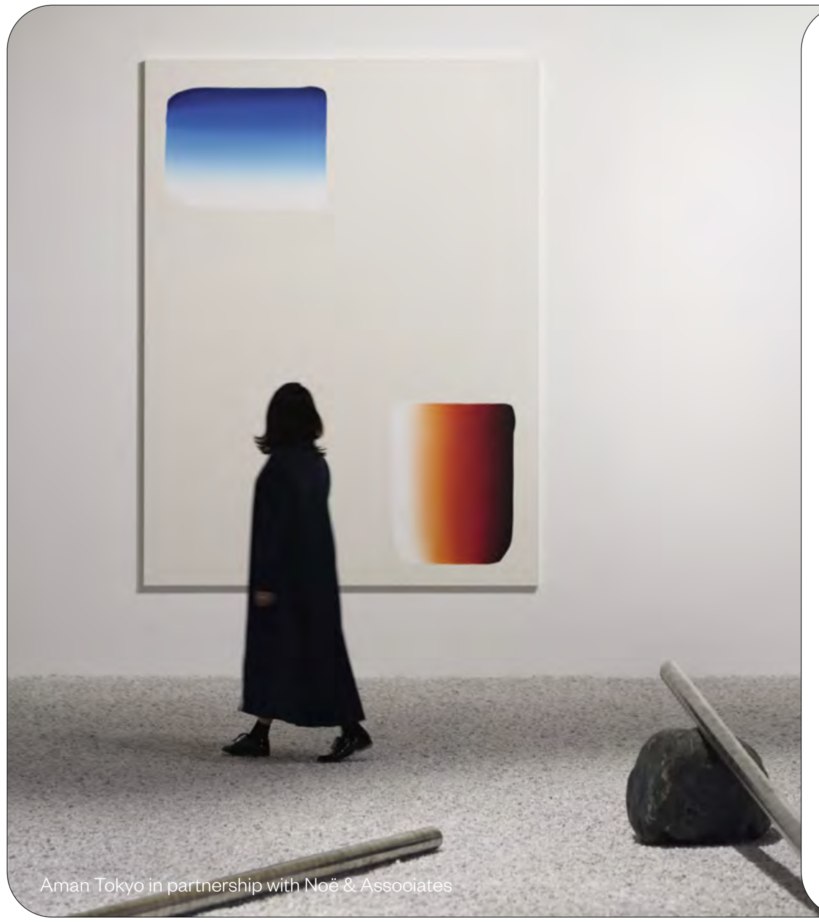
A significant shift in the luxury branded residences market in recent years has been residential developments' evolution into cultural value-added ecosystems. 'Initially, residences were viewed purely as property assets,' explains Martin Raymond, co-founder and editor-in-chief of The Future Laboratory. 'The current progression is towards an 'ecosystem' model, which increasingly pulls in community, external cultural values, and integrates social structures like retail, food and hospitality.' This ecosystem powers the brand's placemaking strategy.

On the following pages are the eight key elements of the placemaking ecosystem within branded residences. Crucially, there is no one, formulaic way to leverage these elements; they must be interpreted in conjunction with a sense of place, brand and audience to create authentic, impactful developments:

'Properties that acknowledge locale, overall cultural community and integration of social structures command better brand equity and perception'

Martin Raymond, co-founder and editor-in-chief, The Future Laboratory

The eight layers of the luxury living ecosystem



Aman Tokyo in partnership with Noë & Associates

1. Brand Identity

'You can't just badge a building, you need to create a brand experience,' says Lindsay McGinn, global vice-president of brand advisory at Accor One Living. Brand becomes the connective tissue between architecture, service design, cultural programming and community curation. 'The brand strategy and identity should contextualise the master brand in a residential setting, defining what living in a branded residence means to customers,' explains Natalie Caetano, managing director at Noë & Associates. 'The brand is not one layer among many within the ecosystem, it is the organising logic that gives all other layers coherence and meaning.'

2. Hospitality Infrastructure

The service layer is the operating system of luxury branded residences. 'Whereas property used to be about location, location, location, branded residences will be about service, service, service,' says Charlie Walsh, global head of residential sales at Maybourne. Top-level hospitality-style service becomes a minimum requirement. 'It's about the comfort and exclusivity of having a private home with all the services – the ease of living at a five-star hotel,' says Adelina Wong Ettelson, former global head of residences marketing at Mandarin Oriental.

Belmond, Peru

Castello di Casole by Belmond, Tuscany

3. Residential Product

The residential offering drives customers' perceptions of their ongoing experience. 'It cannot simply borrow from hotel services; it must possess its own unique value proposition tailored specifically for residential living, which then flexes at each destination,' says McGinn. Central to this is quantifying how the residence improves owners' lives. 'Today's buyers are not purchasing a logo – they are investing in outcomes. They want a home that supports their wellbeing, strengthens their relationships and improves their quality of life,' says Syed.

4. Digital Infrastructure

'Digital infrastructure is no longer a convenience layer bolted onto a finished building; it is the operating system of the residence across its entire life,' says Dorian Vee, co-founder and CTO at Imerza. 'A living digital twin lets a developer simulate building performance and de-risk design decisions during masterplanning, immerse buyers in homes that don't yet exist during sales and then run the building predictively once residents move in.' At The Residences at Mandarin Oriental Bangkok, AI-powered systems learn residents' preferences over time, autonomously adjusting room temperature and lighting to their needs.

Mandarin Oriental Hotel Group

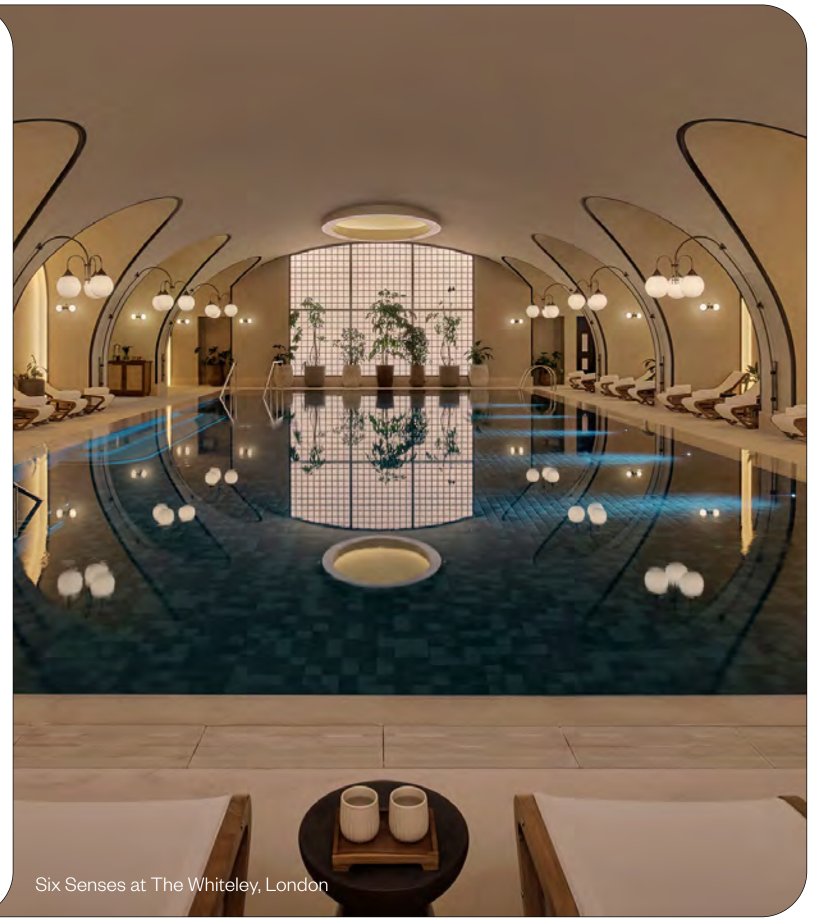
Thebe Magugu Suite at Mount Nelson, South Africa

5. Cultural Programming

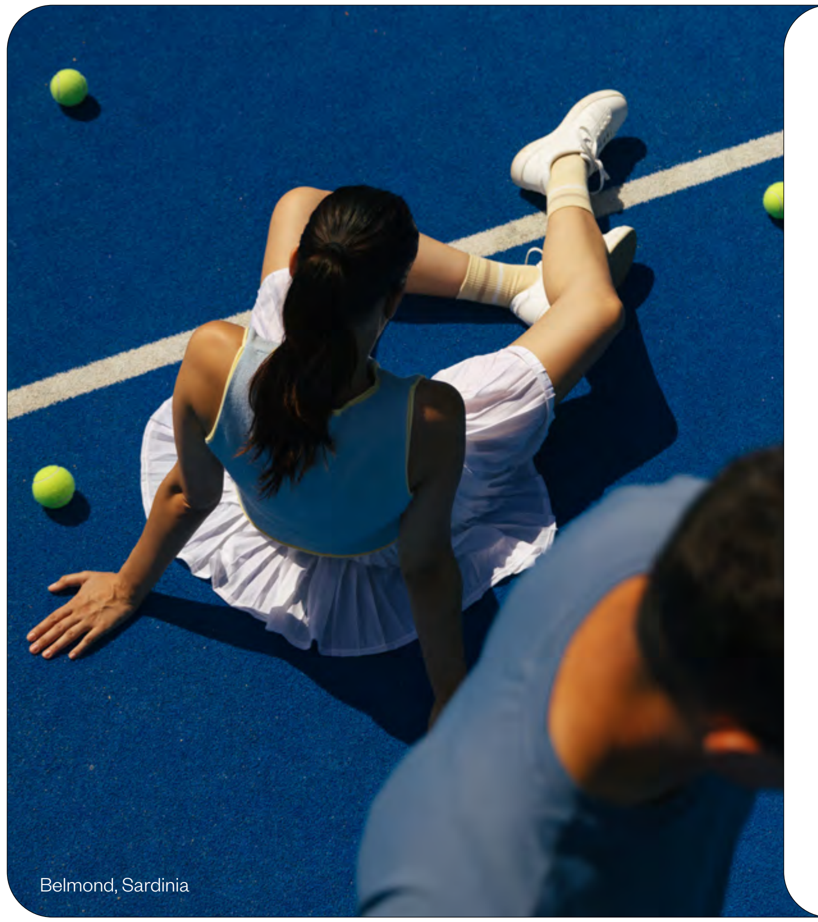
'Cultural engineering' has become an essential element of luxury branded living. Residences are investing in art, theatre, performance and galleries to build equity through relationships with artists and designers. At the Louvre Abu Dhabi Residences, cultural embedding is self-evident. 'The next generation of branded living is less about where you live and more about how you want to live,' says Richard executive vice-president of lifestyle for EMEA at Purple PR. 'The real product is no longer the residence itself, but the community and experiences that surround it.'

6. Wellness & Longevity

As explored in Together Group's The Longevity Effect report, wellbeing and longevity services have moved from value-add to essential infrastructure. Traditional amenities – pools, spas and golf clubs – are being superseded by next-generation wellness offerings at SHA Residences Emirates, Six Senses' bio-hacking park at London's The Whiteley and Equinox Residences. 'Our customers are increasingly prioritising health span, longevity, recovery, sleep, and performance,' says Equinox's Syed. 'These are no longer niche wellness interests – they are becoming fundamental considerations in residential purchasing decisions.'



Six Senses at The Whiteley, London


Belmond, Sardinia

7. Community Building

A crucial element is the creation of community and orchestrated belonging within residences and surrounding neighbourhoods. 'It's about moving away from amenities and towards belonging,' says Jenni Benzaquen, global senior vice-president of residential at Rosewood. 'The strongest communities are built around like-minded individuals who share passions, values and want meaningful experiences together. We need to take cues from the world's greatest luxury houses, private clubs and cultural institutions.' The Embassies Hamburg uses lounges, a spa and bookstore to cultivate exactly this sense of community.

8. Luxury Retail & Dining

Retail and restaurants form a core part of a comprehensive placemaking strategy. At OWO Residences, Raffles London's partnerships with Cartier, Range Rover and Aston Martin offer residents early access to desirable products before public launch. Equally powerful is the halo effect of desirable culinary and retail destinations within mixed-use developments. A key selling point of SLS Madrid Infantas Residences is its proximity to the restaurants, bars and cafés of the Gran Vía boulevard.


The Louis by Louis Vuitton, Shanghai, China

The Three Dimensions of Experience

Every successful branded residence aligns three dimensions simultaneously: the physical space of the residence, the customer experience within it and the story that captures the unique essence of the lifestyle offered. Failure in any one dimension undermines the whole.

: Space

Architecture, landscape and urban design.
The physical environment must embody the brand's aesthetic values at the highest level of execution. Massimiliano Ferrari, president of corporate brand maison, the global licensee of Elie Saab Maison, refers to Elie Saab's Maison Mexico as 'a complete and immersive experience of the brand'. 'Every space, every detail reflects our identity and lifestyle philosophy, 360 degrees.'

: Customer Experience

The quality and consistency of hospitality services, cultural programming and lifestyle amenities. This is where brand promises are kept or broken daily. 'There must be no disconnect between what's promised in brochures and marketing materials and what is delivered,' says McGinn. 'The focus must be on the customer journey in all those different spaces – from arrival and lobbies to elevators, homes, amenities and social areas – to define the brand's narrative within that context.'

: Story

The brand narrative, cultural positioning and global communications strategy. A magnificent building with no story is a luxury apartment block. This story must be, unique, established early and brought to life through digital twin technology and next-generation marketing. 'Digital twins now let a brand prove its story before a single foundation is poured, then keep proving it every day the residents live there,' says Vee. 'The story stops being something you tell and becomes something you can demonstrate.'

Key Takeaway :

The placemaking ecosystem is not a checklist to be completed, but a complex system to be orchestrated. Success demands a brand's ability to translate its story into a unique, three-dimensional, lived-in world, making the residence the ultimate physical expression of its core promise.

Case Studies

Having established the theory behind successful branded residences, we now consider how it is being applied in practice, taking inspiration from pioneering brands that are actively shaping the category's future. These best-in-class case studies emphasise the brand logic behind entry into the branded residences market, the results achieved and the key learnings from each execution.

Digital Twin Experience for Amangiri by Visualisation One

Nobu, Toronto

Culinary brand scaling a lifestyle identity into a global residence portfolio

OVERVIEW

The culinary brand's first officially announced residential offering globally, Nobu Residences Toronto was designed to translate the Nobu lifestyle into a residential product for the first time.

BRAND CHALLENGE

Co-founded by chef Nobu Matsuhisa and Robert De Niro, Nobu had built extraordinary hospitality loyalty. The strategic question was whether this could convert into residential ownership.

STRATEGIC LOGIC

Audience ownership was the primary driver – a test of whether a community built across restaurants and hotels could become a residential buyer pool, moving guests from transient visitors to permanent brand stakeholders.

OUTCOME

The development sold out within three months at record prices for Toronto. It also unlocked a global programme that now spans 20 locations across four continents. In Abu Dhabi, a penthouse sold off-plan for £28m ($37m), setting a new city record (source: Hotel Designs).

KEY INSIGHT

Luxury restaurant brands with strong community loyalty have a ready-made residential buyer pool.

Elie Saab, Dubai

Fashion brand entering residences as a Middle East luxury positioning play

OVERVIEW

A dual collaboration with Emaar Properties across two typologies: the Grand Bleu Tower at Emaar Beachfront – high-rise apartments and penthouses with floor-to-ceiling glass and sea views – and 129 villas at Arabian Ranches III. Both are defined by Elie Saab's haute couture philosophy: precise material selection, sophisticated palettes and atelier-level finish.

BRAND CHALLENGE

Elie Saab had built strong cultural authority in the Middle East through fashion but needed to extend into a broader lifestyle category.

STRATEGIC LOGIC

Equity extension was the primary driver – a strategic evolution from fashion house to lifestyle marque, using haute couture identity to legitimise entry into the HNWI property market.

OUTCOME

Elie Saab now ranks second by pipeline volume among non-hotel brands globally to 2030, according to Savills (source: Savills). The brand has since expanded to Mexico.

KEY INSIGHT

In markets where a brand carries deep cultural authority, its name can de-risk the move into luxury branded living.

Clinique La Prairie, AMAALA

Longevity brand making its most permanent statement about the future of living well

OVERVIEW

The brand's first residential product appears as one of the seven brands at the AMAALA development in the Red Sea, where Four Seasons, Rosewood, Six Senses, Equinox, Jayasom and Nammos also have a presence. Thirteen standalone homes each provide direct operational access to the Clinique La Prairie Health Resort – not as an amenity, but as a structural feature of daily life.

BRAND CHALLENGE

Founded in 1931, Clinique La Prairie built one of the most credible identities in global wellness. Its challenge was to create permanence with a format that made longevity a way of life, not a retreat.

STRATEGIC LOGIC

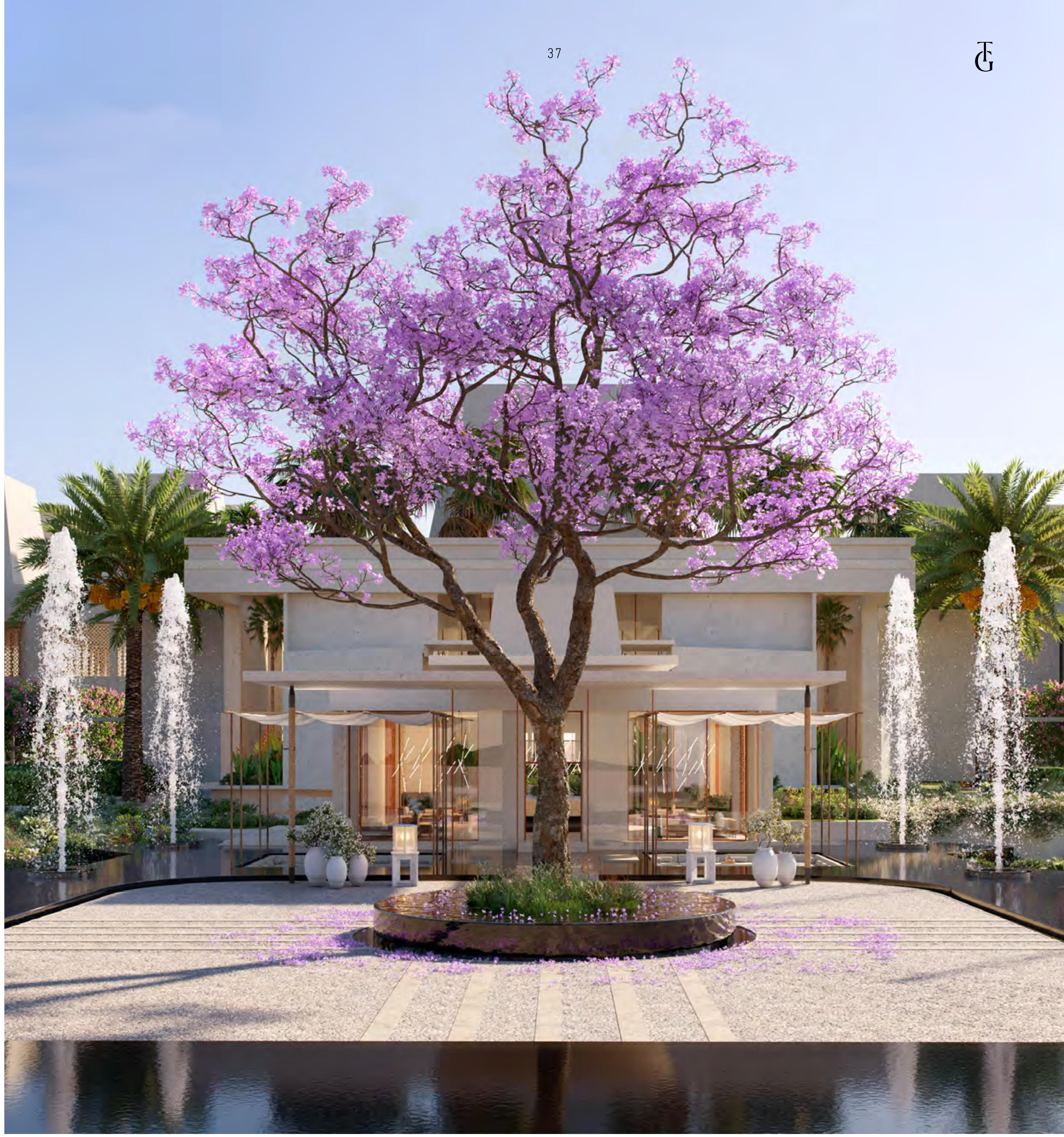
Legacy was the primary driver: creating luxury living that is inseparable from the science of living longer.

OUTCOME

The project built cultural and commercial cachet: recognised as innovative by the Global Wellness Institute at its 2026 Symposium, while the most exclusive AMAALA villas were priced up to £81m ($107m), placing them in the highest tier of ultra-prime real estate globally.

KEY INSIGHT

The most powerful branded residences make wellness the operating system.



Key Takeaway :

These examples illustrate that the most successful branded residences are not based on a single formula, but on a bespoke strategy that aligns the residential proposition with the brand's unique DNA. This proves the sector's power lies not in replication, but in the nuanced, authentic expression of differentiated brand logic.

Aman, Tokyo

Ultra-luxury hospitality brand using residences to deepen community with its most loyal clients

OVERVIEW

Aman Residences, Tokyo – the brand's first standalone development globally, with no attached hotel – occupies floors 54–64 of Japan's tallest building: the 330-metre Mori JP Tower in Azabudai Hills. The 91 residences are served by a residents-only 1,400-square-metre Aman Spa, private dining lounge, and tea room.

BRAND CHALLENGE

Aman had cultivated one of hospitality's most devoted followings – the so-called 'Aman Junkies'. The challenge was to deepen that relationship permanently: moving the brand's most committed fans from guests to full-time residents, without the anchor of an attached hotel.

STRATEGIC LOGIC

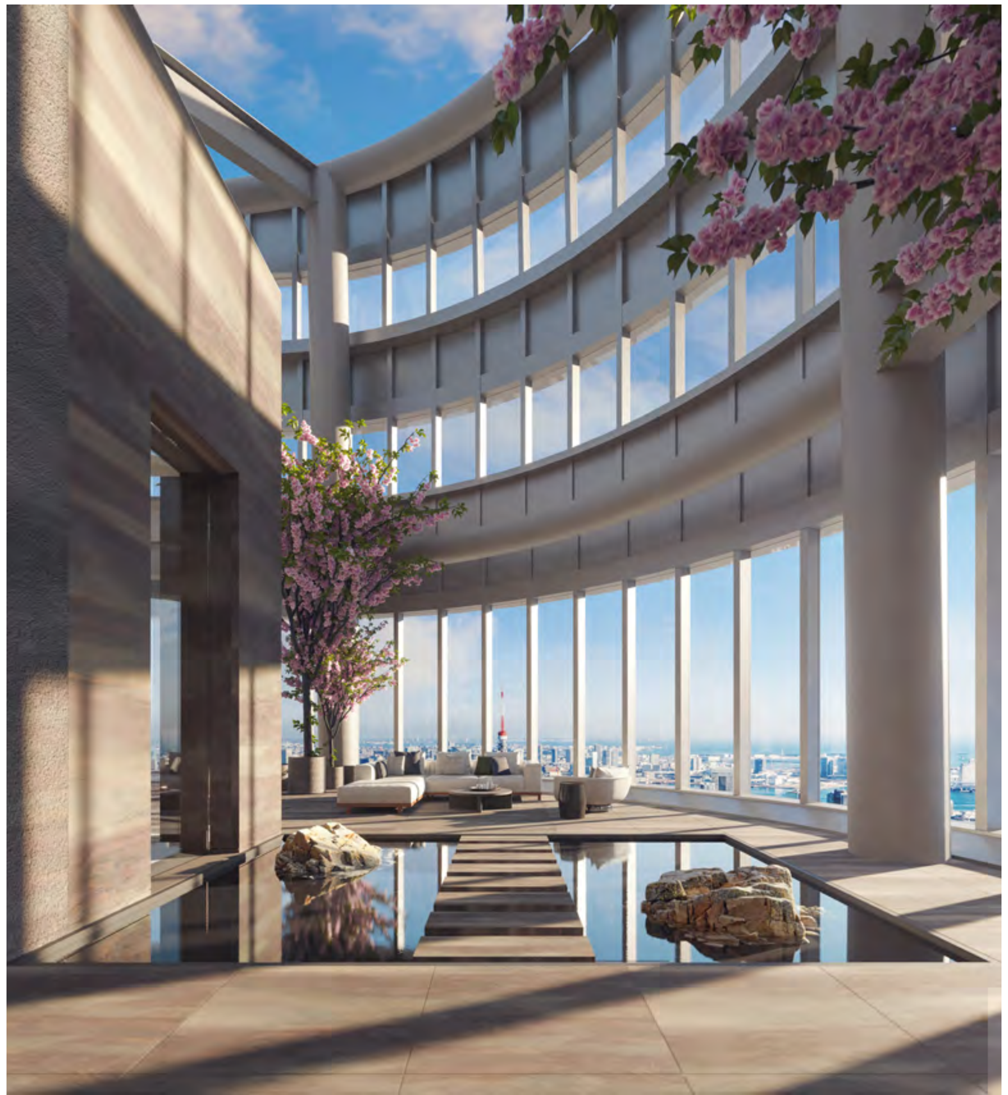
Legacy was the primary driver. The project was conceived as a permanent, place-based community – the definitive expression of what the Aman brand means to its most devoted followers.

OUTCOME

The penthouse sold for approximately £93.6m ($123.8m), setting a new price record for Japan, and the project won Interior Design Magazine's Best of Year Award (source: Tokyo Portfolio).

KEY INSIGHT

Brands with a genuine cult following can move branded residences beyond property, offering a holistic lifestyle approach in mixed-used environments that blend culture, culinary experience, retail, wellbeing and more.



Baccarat, New York

Heritage brand translating craft identity into residential hospitality

OVERVIEW

The 50-storey tower at 20 West 53rd Street features a jet-black aluminium façade and a prismatic glass podium that glows like a chandelier – a direct architectural translation of Baccarat's crystal artistry. The 60 residences sit above a 114-key hotel.

BRAND CHALLENGE

With 250 years of craft heritage, Baccarat needed to evolve beyond product sales and find a new revenue engine in the experience economy.

STRATEGIC LOGIC

Equity extension was the primary driver: a deliberate act of brand world-building that tested whether centuries of crystal craftsmanship could anchor an entirely new lifestyle category.

OUTCOME

The project achieved a Forbes Five-star rating, Condé Nast Traveler Gold List recognition, and a 2017 AIA New York State Award of Merit. The flagship has since seeded a global expansion spanning Miami, Dubai, the Maldives, and Riyadh.

KEY INSIGHT

A brand with deep craft heritage can use architecture as three-dimensional storytelling.

Porsche Design, Miami

Automotive brand translating precision engineering into residential design

OVERVIEW

The tower's defining innovation is the patented Dezervator – a hydraulic car elevator transporting residents in their vehicles directly to their home. The 60-storey Sunny Isles Beach tower is engineered entirely around the brand's automotive identity.

BRAND CHALLENGE

Porsche Design had a strong product licensing business but lacked a physical expression where its philosophy of functional beauty could be experienced at scale.

STRATEGIC LOGIC

Cultural authority was the primary driver – an immersive proof of concept for the Porsche Design worldview that form follows performance, whether in a car or a home.

OUTCOME

126 units within the 132-unit tower sold out pre-construction, generating £630m ($840m) in revenue (source: Forbes and SFBJ).

KEY INSIGHT

Residences offered a route to prove that precision engineering is a universal design language.

Part three

THE BRAND ASSESSMENT

How to decide whether branded residences are right for your brand

AI imagery by The Future Laboratory, UK

The Decision-Maker's Checklist

Having established the key brand logic and building blocks behind successful branded residences, the next step is to move from inspiration to a rigorous internal assessment of readiness and risk. This section considers which brands are best suited to branded residences and underlines the key things they must get right.

The Surrey Residences in collaboration with Noë & Associates, New York

Essential Pre-existing Brand Conditions for Success

Not all brands are ready for, or suited to, branded residences. The following conditions significantly increase the probability of a successful entry and avoid the risk of brand over-extension and dilution.

- ☐ **Strong lifestyle identity**
  The brand is associated with a coherent, aspirational way of living – not just a product category. Fashion, hospitality, automotive, wellness and culinary brands typically score highly here.

- ☐ **HNWI audience alignment**
  The brand's core consumer overlaps with the buyer profile for super-prime residential – globally mobile, multi-property, high discretionary spend.

- ☐ **Design and quality authority**
  The brand has established credibility in design, craft or spatial experience. Buyers must believe the brand can translate its values into architecture and interiors.

- ☐ **Operational credibility**
  Either the brand has its own operational infrastructure (hospitality brands) or has identified the right operator partner. The day-to-day experience will make or break the brand's reputation.

- ☐ **Long-term commitment**
  Branded residences are 10–25-year projects. The brand must have the appetite and governance stability for a long-term commitment. 'This commitment must not just be through association, but active participation in and responsibility for the residential experience,' says Tim Gosman, global head of strategy at Noë & Associates.

Masterplanning and defining strategy and assets

The crucial first step is to define a unique, brand-specific strategy with clearly articulated brand guidelines that dictate how the brand appears at every stage. 'The quality of design decisions in the early masterplanning stage massively impacts the whole life-cycle cost,' says Kurtzke. 'Unless you have very tightly defined brand guidelines, unless your whole framework is very locked down, you're going to end up with significant quality and brand experience issues later.'

This level of detail is essential to manage risk. 'Reputational risk comes with every aspect of building and operating a branded residence,' warns Dean Main, founder and CEO of Rhodium. 'The risk is when a brand simply lends its name for a fee without any operational oversight or investment in the resident experience.'

Brands must also determine which elements of identity are fixed and which are flexible. 'It's very important to consider the extent to which the brand can be adapted to suit each market-specific expression,' adds Gosman. 'Where do developers have the opportunity to contextualise the brand, and what elements are sacrosanct?'

Key elements of branded residence masterplanning:

- ☐ **Vision** – defining the brand strategy, cultural narrative and identity of the residence

- ☐ **Spatial strategy** – designing district frameworks that establish unified principles across the development.

- ☐ **Experience architecture** – mapping digital and physical journeys and touchpoints of residents and visitors

- ☐ **Brand ecosystem** – integrating hospitality, culture and residential life

'Unless you have very tightly defined brand guidelines, unless your whole framework is very locked down, you're going to end up with significant quality and brand-experience issues later'

Dr Christian Kurtzke, CEO, Together Group

Nobu Residences Abu Dhabi in collaboration with Noë & Associates

Regional Strategy and Choosing the Right Developer Partners

The developer relationship is the most important decision a brand will make. The right partner represents the brand at every stage, ensuring alignment with and protection of brand standards. 'It's important to work with partners who embody the same ethos and quality standards as the brand,' says Gosman. 'Does the interior designer have a vision for this property that aligns with the brand's aesthetic and cultural heritage?'

Developers also play a crucial role in translating the brand for regional audiences, embedding the story with local cultural nuance. 'Branded residences must be reflective of the sense of place,' says Benzaquen. 'Design must pull through the local identity, culture and traditions – not in a way that feels kitschy, but in a way that feels like an elegant translation of the environment.' At Rosewood's Villa Magna in Madrid, hand-selected fabrics, colour palettes and curated art commissions reflected the architectural heritage of the Spanish capital.

Key criteria for choosing a developer partner:

- ☐ Track record in super-prime residential sector at the relevant scale
- ☐ Financial stability across the full development lifecycle
- ☐ Design ambition, shared ethos and commitment to architectural quality
- ☐ Alignment on brand governance, creative control and approval rights
- ☐ Experience managing brand partnerships
- ☐ Geographic and cultural fluency in target market

Understanding the Deal Structure

The four primary commercial models offer different levels of involvement, control, risk and reward:

: **Brand licensing**
The brand licenses its name, identity and design standards to a developer via a formal licence agreement, typically earning a royalty of 1–6% of gross development value. Minimal operational role; the developer manages delivery and services. Lowest complexity, lowest ongoing income, least brand control post-sale.

: **Brand licensing plus management agreement**
As above, but the brand or its operator also manages the residential experience, HOA governance and often a rental programme. Higher fees, deeper brand protection and greater resident quality control. The dominant model for hotel-affiliated schemes.

: **Franchise plus third-party operator**
The developer licenses the brand under a franchise agreement and appoints an independent third-party operator (TPO) to manage on-site services under the brand's standards. The brand collects franchise fees; the TPO handles operations. Common where the brand seeks scale without operational responsibility, or where a non-hospitality brand lacks residential management expertise.

: **Co-development**
The brand takes an equity stake alongside the developer, sharing capital, risk and upside. Rare in practice and typically reserved for flagship projects where the brand requires maximum control over long-term positioning. Highest capital commitment, highest potential return, greatest governance complexity.

'The biggest misconception in branded residences is that the brand alone creates value. It doesn't. Value is created through the collective strength of the developer, the location, the architecture, the service experience and the brand working together'

Shafi Syed, global head of hotel development, Equinox

The Equinox New York Hudson Yards flagship mixed-use tower, which includes a hotel, club, office and residences

Leveraging Digital Twin Technology to Plan and Sell The Unbuilt

Digital-twin technologies have become essential within branded residence partnerships, enabling teams to visualise unbuilt ambitions, anticipate issues and refine planning with precision. From a functional perspective, digital twin technology improves masterplanning quality, supports project management throughout construction, and creates the basis for digital guest experiences and remote building management post-launch.

The immersive capabilities of digital twins also accelerate sales and marketing of unbuilt environments, de-risking projects by optimising construction accuracy while supporting early unit sales. 'We can create a digital twin or a digital replica of a place which is so photorealistic that it feels like you're there,' says Mark Noë, founder of Noë & Associates. 'Bringing something that is so fantastical in so many people's minds to reality through digital experiences is a massive opportunity.'

The Related Ross Experience Center, developed by Noë & Associates with Imerza in West Palm Beach, demonstrates this in practice. Housed across 10,000 square feet in CityPlace, the centre uses Unreal Engine-powered visualisation to render entire development districts in photorealistic detail – enabling buyers and investors to explore sites, customise finishes and interrogate sightlines before a single foundation has been laid.

The Related Ross Experience Center, developed by Noë & Associates with Imerza in West Palm Beach, Florida, US

Key Takeaway :

A branded residence is a decades-long commitment that demands meticulous due diligence, vision and planning from the outset. Working with the right partners and creating rigorous brand frameworks and guidelines that precisely articulate what the residential expression of you brand is, are crucial steps in de-risking the venture and aligning stakeholders around a clear vision for long-term value.

'The brands that win the next decade won't treat technology as an amenity; they'll treat the digital twin as the connective tissue that makes a residence feel like the brand, everywhere, for the life of the building'

Dorian Vee, co-founder and CTO, Imerza

Digital Twin Experience for Amangiri by Visualisation One

Part four

FUTURE-PROOFING YOUR PROJECT

How to prepare for the future of luxury branded living

Mandarin Oriental Miami in partnership with Noë & Associates

Once a clear framework has been established that underscores the minute details of how a brand will translate into a residential offering, another critical variable in the equation is the future HNWI purchaser. Many projects starting now will not launch until the mid 2030s. Thus, an understanding of how the luxury consumer of 2035 will vary from their predecessors becomes inextricably linked to project success.

Nobu Residences Abu Dhabi in collaboration with Noē & Associates

Tomorrow's HNWI Buyers

Thebe Magugu Suite at Mount Nelson, South Africa

As wealth transfers from HNWI Boomers to their Gen Z and Millennial equivalents – and overwhelmingly into female hands – the key triggers of purchase are changing. Where Boomers invested in property assets, younger buyers seek purposeful investments that embrace holistic wellness, high ESG credentials and authentic social relevance.

‘As I’ve discovered from speaking with different generations from the same Family Office, what their parents invested in is radically different from what their children and grandchildren – now in their 30s and 40s – are happy to invest in,’ says Raymond. ‘While one sees it through the filter of an asset that is entirely about how it sustains itself fiscally, the other groups look at how their investment can add value, have purpose and be less damaging to the planet.’

The £63 trillion ($84 trillion) intergenerational wealth transfer now under way is reshaping who buys branded residences – and why. Gen Z and Millennial HNWIs don’t reject luxury; they redefine it. Purpose, flexibility and proof matter more than prestige, permanence and size. The so-called Feminisation of Wealth will accelerate this shift further. Research shows 71% of women take sustainable considerations into account when investing versus 58% of men, and 89% of women want socially responsible investments compared to 70% of men (sources: UBS and WealthiHer). As the HNWI cohort becomes more female, purpose-driven, community-focused investment will only deepen.

‘With all curation and codification of experiences, brands and developers must equally take care to ensure a natural, effortless and authentic experience is built and avoid overengineering experiences and programming’

Dr Christian Kurtzke, CEO, Together Group

Below are the eight characteristics that will determine whether a branded residence earns – or loses – a younger buyer.

: **Sustainability as standard, not a selling point:** Net-zero construction, green certifications, low-carbon materials and energy-efficient operations are purchasing criteria – not aspirational extras. Some 63% of Millennials have put money into sustainable investments, compared to just 35% of Baby Boomers (source: Knight Frank).

: **Invisible, intelligent technology:** Younger HNWIs expect AI-driven smart living that anticipates rather than reacts – predictive climate control, automated security, personalised lighting and seamless digital-physical integration that disappears into the home rather than demands attention.

: **Holistic wellness architecture:** Younger buyers want biophilic design, circadian lighting, air and water purification, longevity programming and mental health infrastructure built into the architecture – not added as spa facilities.

: **Home as identity, not just asset:** For younger HNWIs, homeownership is the ultimate marker of personal identity. The branded residence must reflect who they are, not just what they’re worth. Brand aesthetic, design language and cultural alignment matter as much as heritage.

: **Authentic brand values:** Younger HNWIs interrogate brand ethics, favouring brands that demonstrate genuine commitment to transparency, social responsibility and environmental stewardship – and who can back this up with clear evidence.

: **Community and social capital:** Younger buyers seek curated belonging over isolated luxury. Co-working lounges, residents’ clubs and programming that facilitates genuine social connection among like-minded peers are active purchase drivers.

: **Flexibility and global mobility:** Younger HNWIs are more likely to be considering an investment property than older generations – and they want residences that function across multiple modes: primary home, rental asset, lock-up-and-leave and remote work hub. They also want clear evidence of rental yield, price premium resilience and long-term capital appreciation.

: **Experiential living over material luxury:** Square footage is no longer the primary metric. Younger buyers value what happens inside the building – curated events, F&B concepts, cultural programming, immersive wellness experiences and access to exclusive networks.

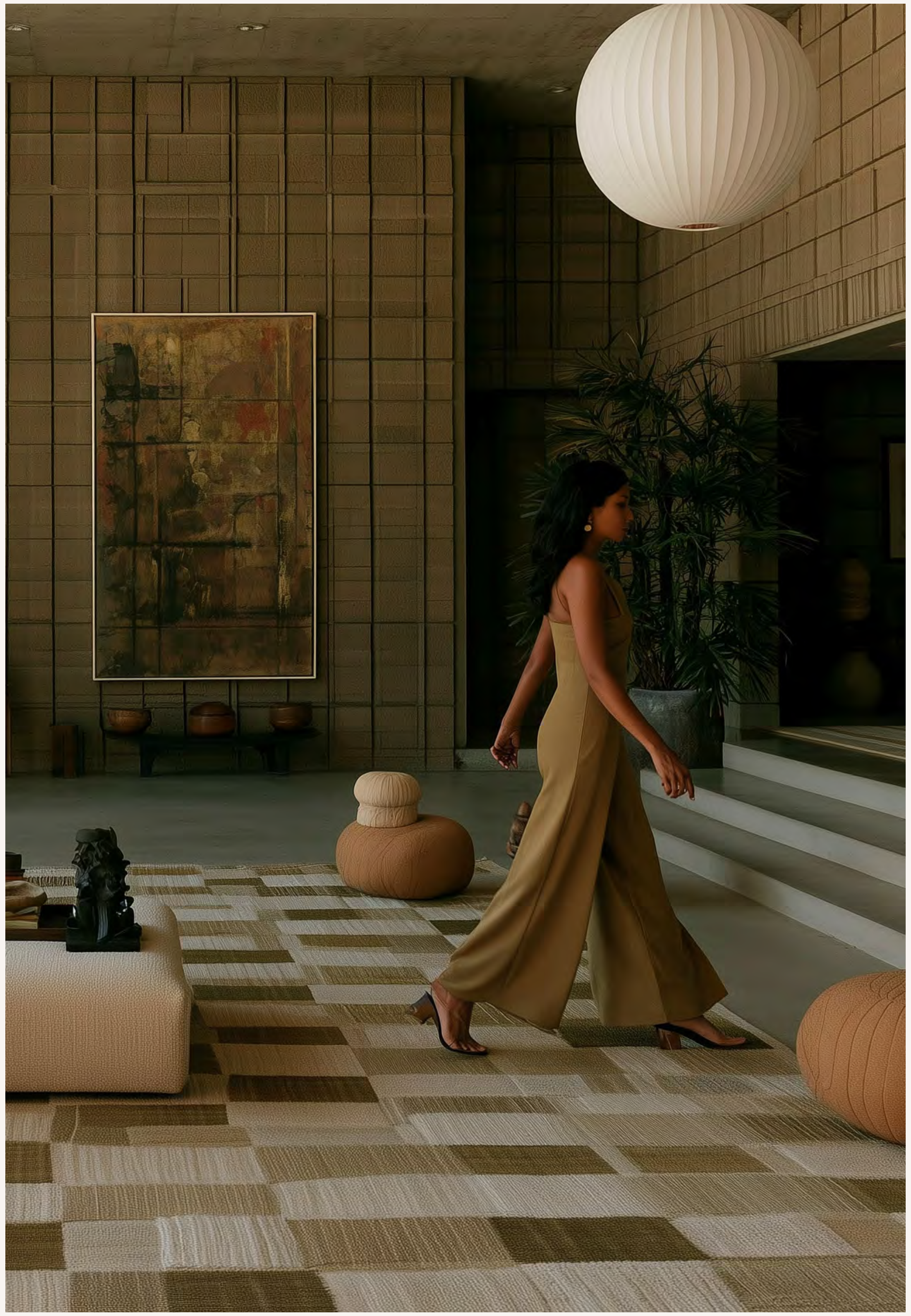
How the future buyer is realigning luxury:

Characteristic	Gen Z & Millennial HNWIs	Baby Boomer & Gen X HNWIs
Brand	Identity and values-aligned	Heritage and status
Luxury definition	Experience and purpose	Scale and material grandeur
Wellness	Structural and architectural	Amenity-based
Community	Active social infrastructure	Privacy and seclusion
Technology	Invisible and intelligent	Convenient but optional
Flexibility	Multi-use, mobile, investable	Long-term primary residence
Sustainability	Non-negotiable baseline	Secondary to prestige

Key Takeaway :

The next generation of HNWI buyers is seeking a new form of value, where purpose, wellness and community outweigh traditional, passive luxury. For developers and brands, this represents a fundamental rewiring of desire; failing to meet this new mindset is to build for a customer who no longer exists.

Luxury Living 2035



AI imagery by The Future Laboratory, UK

The new HNWI mindset established in the last section will reshape the very definition of luxury living over the next decade in the following key ways.

The Wellness-residential Convergence

Wellness is migrating from amenity to infrastructure. Across the sector's most ambitious developments – like Clinique La Prairie, AMAALA homes in the Red Sea – health is no longer supplementary to the residential proposition but part of its structural logic. Longevity science, biohacking, biomarker analysis, personalised nutrition and circadian architecture now inform the daily rituals of residents. Embedded sensors and spatial design are making health management continuous.

Looking ahead, wellbeing will move beyond the clinical as 'healthy hedonism' emerges – residences balancing optimisation with joy, social vitality and recreation. Longevity science will coexist with curated social programming, generous communal spaces and environments designed as much for pleasure as performance. A more provocative frontier is also forming: transformative therapeutic experiences including microdosing and psilocybin-assisted practices, already offered in legally permissive jurisdictions from Jamaica to the Netherlands. By 2035, these modalities could migrate from retreat settings into branded residence ecosystems, making residences an active agent in their occupants' cognitive, therapeutic and physiological lives.

The Phygital Residence of the Global Nomad

Digital infrastructure is already reshaping how branded residences are conceived, sold and managed. Digital twin models allow developers to simulate building performance and offer buyers immersive VR walkthroughs of unbuilt homes. AI-powered smart-home systems now deliver seamless, deeply personalised experiences that enhance comfort intuitively without showcasing technology for its own sake.

What emerges next is more consequential. Embedded technologies are evolving beyond convenience into diagnostic principles – monitoring health, scanning pollution, UV and atmospheric changes. By 2035, this logic will extend across entire branded portfolios, delivering the predictive, intelligent, invisible systems that younger HNWIs will expect.

As HNWIs operate across distributed portfolios of three to five properties spanning multiple continents, technology will shift focus from residence to presence – providing the connective thread of brand service across global locations. Crucially, this tech layer will elevate, not replace, rich physical brand engagement. 'Digital ubiquity means real life will become the commodity –there's going to be an intersection between growing affluence and a greater appetite for experience, and therefore brands have the opportunity to fulfil that need,' says Whattam.

'Our customers are increasingly prioritising health span, longevity, recovery, sleep and performance. These are no longer niche wellness interests – they are becoming fundamental considerations in residential purchasing decisions'

Shafi Syed, global head of hotel development, Equinox

Clinique La Prairie Residences, Amaala, developed by Red Sea Global in partnership with Clinique La Prairie, Saudi Arabia

Baccarat Residences Dubai in partnership with Noë & Associates

Emerging Geographies of Luxury

The centre of gravity for luxury branded residences is shifting. MENA has recorded a 187% increase in branded residence schemes over five years, as Dubai, Riyadh, Abu Dhabi and Ras Al Khaimah rise in prominence. Development in Southeast Asia is up 55%, while Latin America is projected to grow 194% by 2032 (sources: Savills 1, 2 and 3). Brands defining global strategy by referencing only New York, London and Paris are already behind.

Global expansion demands brand expressions contextualised with local nuance. Diriyah Gate in Saudi Arabia demonstrates what cultural coherence at scale can achieve: a unified Najdi architectural language embedded with local craftsmanship and spaces for locals to live and work translates ancient design and social practices into modern living. Elsewhere, Red Sea Global's flagship regenerative masterplan operates entirely on solar energy to enhance its ecosystem, not merely protect it.

Residences that improve rather than extract from their locale will grow in importance as younger generations come of age. 'Purpose is going to be as critical as wellbeing and longevity in the future of residential,' says Benzaquen. 'Whether it's ensuring that you're infusing purpose and sustainability into the actual architecture and build, or the environment that you're in.'

'Purpose is going to be as critical as wellbeing and longevity in the future of residential'

Shafi Syed, global head of hotel development, Equinox

Key Takeaway :

The luxury residence of 2035 is not a static home, but a dynamic, intelligent node in a global network of wellness, connectivity and purpose-led living. For the world's leading luxury brands, this represents the next frontier: moving beyond placemaking to presence in the well-lived regenerative lives of next-gen luxury buyers.

Part five

CONCLUSION

Key takeaways and next steps

Nobu Beach Inn, Barbuda, developed within the Barbuda Ocean Club by Discovery Land Company in partnership with Nobu Hospitality, Caribbean

SUMMARY AND IMPLICATIONS

The branded residences sector has reached a strategic inflection point. What was once a peripheral licensing opportunity or hospitality brand extension should now be considered a central pillar of long-term strategy for lifestyle-adjacent luxury brands.

The evidence is conclusive: for the world's leading luxury brands, residential is the ultimate expression of brand equity – a vehicle for transforming brand narrative into lived-in reality and forging permanent relationships with the highest-value HNWI audiences.

Brands that develop compelling residential offerings will build more than homes; they will architect new revenue ecosystems, deepen cultural authority, and secure a legacy for decades to come. Those that hesitate risk more than market share – they risk strategic relevancy, ceding the most fertile ground for growth to competitors who adapt faster. The new codes governing desire, status and brand affinity are being rewritten by a next-generation HNWI cohort for whom community, experience, longevity and purpose define luxury.

The question is no longer why to enter the branded residences market, but how to begin.

AI imagery by The Future Laboratory, UK

HOW TO BEGIN

This forward-looking vision provides a clear direction of travel. For brand leaders, the final question is how to begin the journey and translate this future potential into an actionable strategy today.

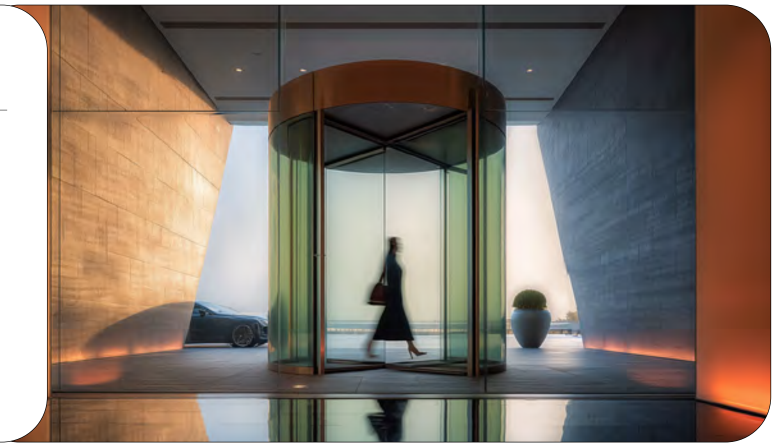
The first steps to take when starting a branded residences project:

1. Define your brand's residential proposition

Before approaching any developer, the brand needs a clear articulation of its residential identity: what it stands for in a home context, what the resident experience looks and feels like, and what the brand brings that no other brand can.

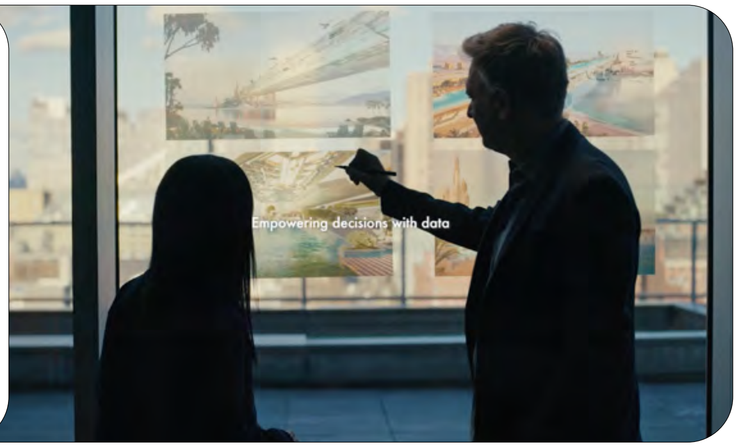
2. Map your audience

Conduct a rigorous analysis of your existing UHNW client base and the markets where they are buying or aspiring to buy residential property. The best-fit markets will be where your brand already has cultural resonance and commercial presence.



3. Build your partner criteria

Define the developer profile that matches your brand values, operational standards and long-term ambitions before you enter the market. The partner decision is more important than the market decision.



1. Thebe Magugu Suite at Mount Nelson, South Africa; 2. AI imagery by The Future Laboratory, UK; 3. Noë & Associates

4. Commission a strategic brief

Before any developer conversation, produce a branded residences brief that defines your design standards, service standards, experience principles and governance requirements. This is your negotiating position and your protection.

5. Assemble the right team

Branded residences require expertise across brand strategy, foresight, placemaking, visualisation, communications and legal structures. The brands that succeed are those that bring the right constellation of advisors and partners before the first developer conversation.

6. Think outside the residential brand strategy

Develop a unique luxury placemaking strategy, cultural ecosystem and community platform for each individual project.

7. Plan beyond the purchase

Building an authentic, post-purchase lifestyle is central to long-term success. Consider what your brand's 360-degree lifestyle could look like and how you can leverage innovative technologies to deliver it.

4. Aman Tokyo in partnership with Noë & Associates; 5. Noë & Associates; 6. Floating Padel Court by Yntegra Group at Rosewood Exuma; 7. AI imagery by The Future Laboratory, UK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