

29 September – 1 October 2026
Madinat Jumeirah, Dubai

THURSDAY, 1 OCTOBER 2026

The State of the Global Branded Residences Market

SPEAKERS

Jeff Tisdall

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OVERVIEW

At FHS World 2026 in Dubai, Jeff Tisdall, Chief Business Officer at Accor One Living and Global Head of Mixed Use at Accor, delivered a comprehensive state-of-the-market address on branded residences, framing Dubai as the undisputed global epicentre of the sector. Drawing on third-party data from Knight Frank, Savills, and Global Branded Residences, Tisdall traced the evolution of branded resi from its American luxury origins to a globally diversified, multi-segment category now encompassing lifestyle, fashion, automotive, and design brands across 250-plus labels. He outlined the structural drivers sustaining the market — mobile wealth, favourable tax regimes, unprecedented ultra-high-net-worth growth, and rising family office demand — while pressing operators to rethink delivery through a residential, not hotel, lens. The session also surfaced emerging opportunities in standalone formats, technology-enabled service models, and the potential to export the branded-living recipe into adjacent sectors such as commercial office, private clubs, and student housing.

KEY THEMES

- Global market growth and geographic shift to the Middle East and Asia Pacific
- Brand proliferation and demographic segmentation beyond classic luxury
- Mobile wealth, tax-driven migration, and ultra-high-net-worth expansion
- Residential-first mindset versus legacy hotel thinking in design and service
- Service charge discipline and concierge-led efficiency models
- Innovation in standalone formats, technology, and adjacent sector application

TAKEAWAYS

- Design and operate branded residences through the lens of a private home, not a hotel — every touchpoint from arrival sequence to wellness facilities must reflect a homeowner's expectation of privacy and permanence, not a transient guest stay.
- Service charge is a needle-threading exercise: elevate the resident experience through concierge-curated, vetted third-party services and self-guided amenity design rather than loading overhead costs into the charge itself.
- The 30–35% price premium for branded residences has remained consistent since 2012 and can expand further on resale with the right brand, maintenance, and community animation — make long-term asset stewardship part of the developer pitch.

- Standalone branded residences are only viable when underpinned by a hospitality engine — co-locating with food and beverage, private clubs, or serviced offices (as Accor is doing with Pullman in Dubai) creates the scale and experience density that justifies the brand promise.
- Brands must now deliver far beyond a logo: developers expect lead generation, spokesperson access for media relations, owner-recognition programmes across the brand ecosystem, and a bespoke technology stack including digital concierge and discrete residential accounting solutions.
- With nearly 750,000 ultra-high-net-worth individuals globally, 90 being added daily, and 10,000 family offices projected by year-end, the demand pipeline is structurally robust — brands should actively help investment partners access family office capital, for whom branded residential is already a core asset class.

QUOTES

"The drive to live inside the brands that we love has never been stronger. And that demands expertise, vision, and the discipline to get every detail right."

— **Jeff Tisdall, Chief Business Officer, Accor One Living, Global Head of Mixed-Use, Accor**

"We need to ensure that we look at branded living projects through the lens of private homes, not with a hotel mindset or a legacy mindset."

— **Jeff Tisdall, Chief Business Officer, Accor One Living, Global Head of Mixed-Use, Accor**

"The brand is simply no longer enough. If it ever was, it's not today."

— **Jeff Tisdall, Chief Business Officer, Accor One Living, Global Head of Mixed-Use, Accor**

"Wealth continues to be generated at unprecedented levels. There are now nearly three quarters of a million ultra high net worth investors worldwide, and 90 ultra high net worth individuals are being added to those numbers daily."

— **Jeff Tisdall, Chief Business Officer, Accor One Living, Global Head of Mixed-Use, Accor**