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The Next Chapter: Can Dubai Sustain Its Branded Residence Momentum?

SPEAKERS

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Chief Executive Officer
International Hospitality Media...

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Rove Hotels

Jackie Johns
Managing Partner
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OVERVIEW

This panel session at FHS World 2026 examined whether Dubai's branded residence market can sustain its remarkable momentum, bringing together perspectives from a hotel brand marketer, a lifestyle hotel operator, and a luxury real estate broker. Moderated by Piers Brown of International Hospitality Media, the discussion explored the depth and diversity of buyer demand, the risk of brand dilution as more logos enter the space, and what distinguishes genuinely successful branded residence projects from those that merely trade on a name. Panellists stressed that the market is entering a critical new phase as a wave of recently launched projects begins to hand over, shifting the conversation from sales promises to lived experience and delivery. The session concluded that wellness, service, coherent brand-developer fit, and long-term community-building will define the next generation of product.

KEY THEMES

- Brand dilution and the risk of reducing branded residences to mere logo placement
- Right brand, right developer, right location — the importance of strategic fit
- Shifting from sales promise to delivery as projects come online
- Evolving buyer demographics and feeder markets, including new entrants from the US and Latin America
- Wellness, work-from-home design, and experiential living as purchase drivers
- Automotive and fashion brands entering the space and the challenge of delivering a true residential experience

TAKEAWAYS

- Branded residences must deliver a genuine hospitality and service experience — a logo alone is insufficient and risks eroding the category's credibility with increasingly sophisticated buyers.
- The market is moving from promise to execution: as projects begin handing over, brands and developers will be judged on whether they deliver the lifestyle and service standards marketed at launch.
- Successful launches require meticulous upfront planning — including broker education, on-brand creative assets, and clear alignment between brand identity and target buyer — as demonstrated by the Rixos Al Rayan Abu Dhabi example.
- Wellness is now a primary purchase driver, alongside service and work-from-home functionality; developers seeking advisory input should treat these as non-negotiable design requirements rather than optional amenities.

- The resale market for truly well-managed branded residences is showing approximately 20% price premiums over purchase price, with sellers holding firm and no distress evident in the Dubai market.
- Non-hospitality brands (automotive, fashion) entering branded residences represent a different buyer pool rather than direct competition, but their arrival raises the bar for hospitality operators to demonstrate the unique value of genuine service delivery.

QUOTES

"There's still no distress in Dubai. Everybody's looking for distress. We're still at a huge stand off between buyer and seller in terms of expectations, but the sellers are holding firm."

— **Jackie Johns, Managing Partner, Christie's International Real Estate Dubai**