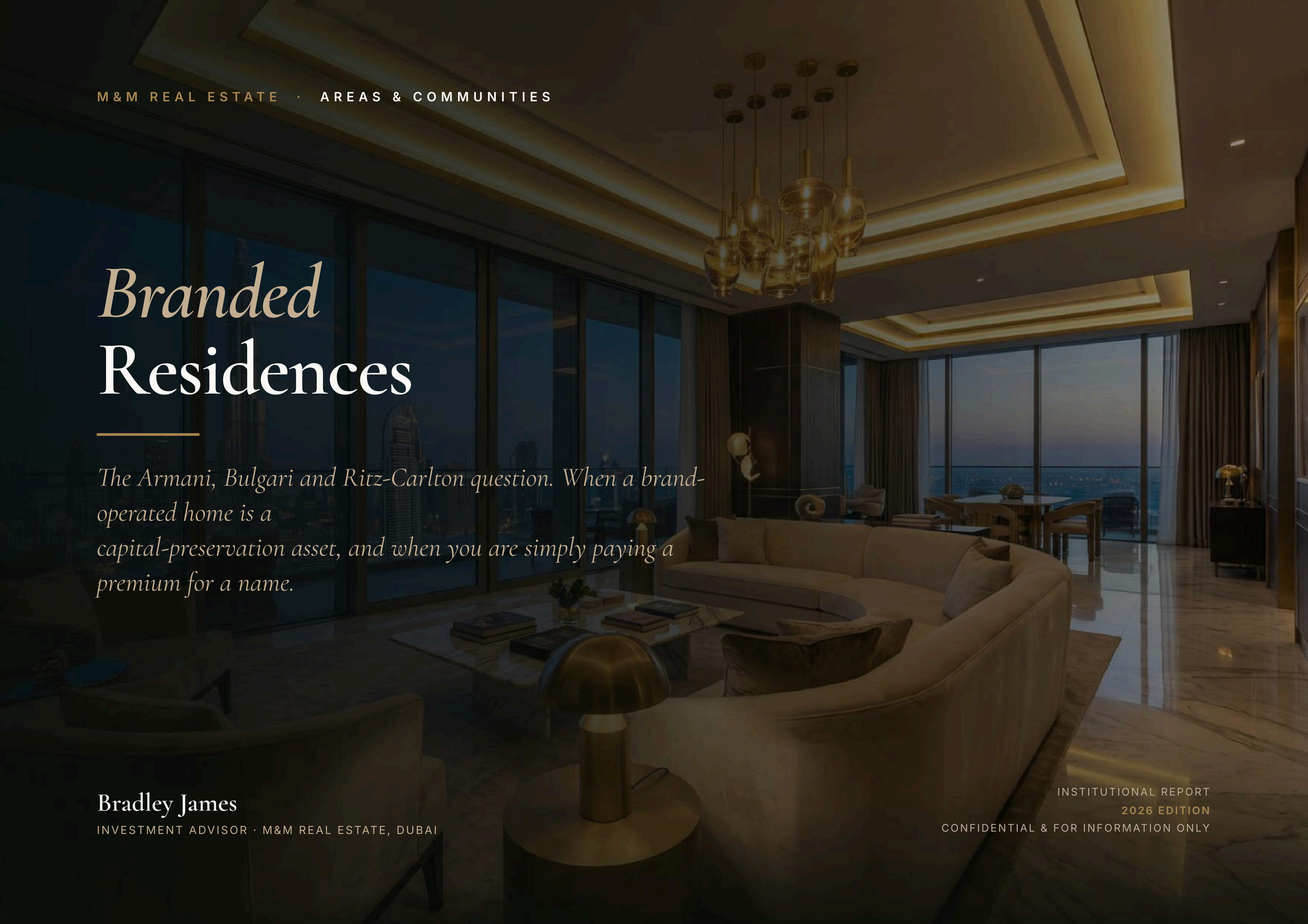

Branded Residences

The Armani, Bulgari and Ritz-Carlton question. When a brand-operated home is a capital-preservation asset, and when you are simply paying a premium for a name.

Bradley James
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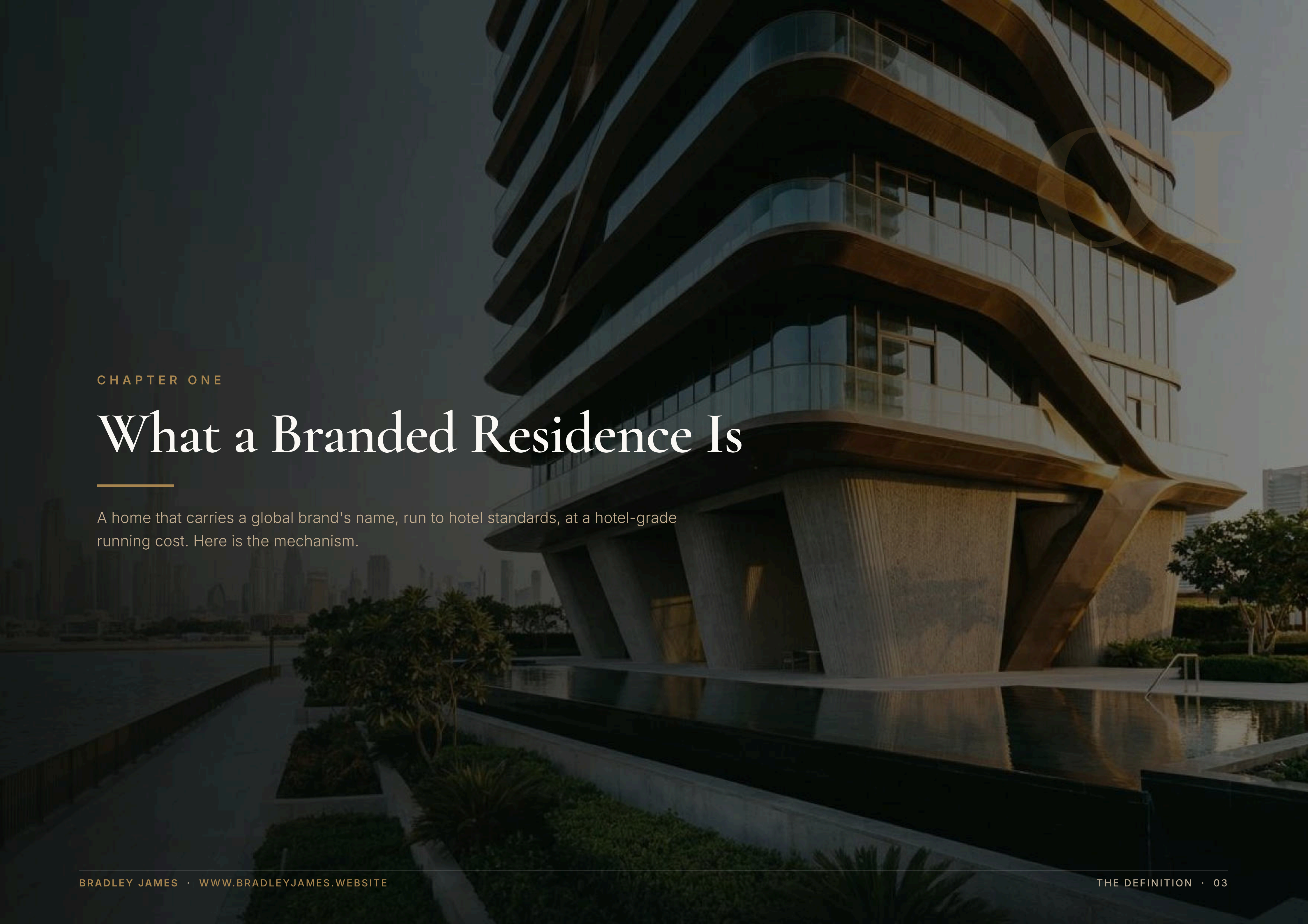
What This Guide Covers



CHAPTER ONE

What a Branded Residence Is

A home that carries a global brand's name, run to hotel standards, at a hotel-grade running cost. Here is the mechanism.

CHAPTER 01 · THE DEFINITION

A Home That Wears a Name

A branded residence is a private home that carries the name of a luxury brand and is run to that brand's operating standard. You own the apartment or villa outright, on a freehold title, but the building is managed by a named operator, and the brand's service, design and standards come with it.

Most of the recognised names are hotel operators. Think Armani and Bulgari, the Dorchester Collection, Ritz-Carlton, Four Seasons and Baccarat, alongside a growing set of fashion and design houses. Roughly **79% to 80% of branded residences worldwide are delivered by hotel operators**, which is why the defining feature is hotel-grade service: concierge, housekeeping, valet, in-residence dining, spa and gym access, and a single point of accountability for how the building runs.

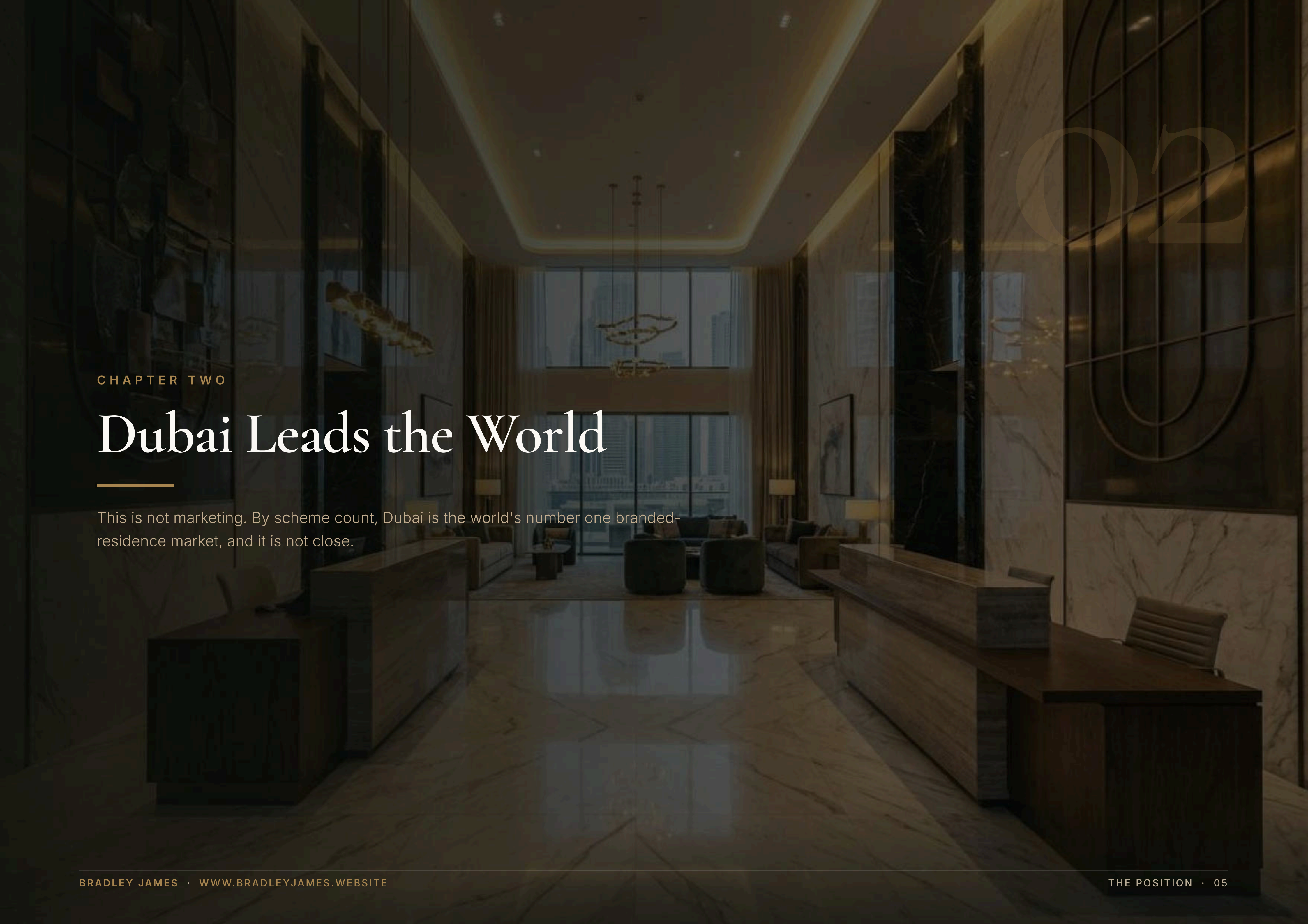
The trade is simple to state. You get a turnkey, professionally run home with a standards floor set by the brand, and in exchange you pay two premiums: a higher purchase price up front, and a higher, permanent service charge for as long as you hold. Everything in this guide is about whether those two premiums are buying you a real asset, or simply a name.

WHAT YOU ACTUALLY BUY

- A freehold home, owned outright, with a title deed in your name.
- A brand's name on the building, licensed to it, not owned by you.
- Hotel-grade services: concierge, housekeeping, valet, amenities.
- A standards floor: the operator maintains the building to brand spec.
- A higher price at purchase, and a higher service charge for life.

THE WHOLE QUESTION

"You own the walls. You license the name. The honest question is whether the name is buying you an asset, or just a badge."



02

CHAPTER TWO

Dubai Leads the World

This is not marketing. By scheme count, Dubai is the world's number one branded-residence market, and it is not close.

CHAPTER 02 · THE RANKINGS

The World's Number One, by Scheme Count

State this plainly, because it is one of the few Dubai superlatives that survives the data. By the number of branded-residence schemes, Dubai is the largest such market on earth.

Savills' 2025/26 branded residences work counts **151 schemes in Dubai**, made up of 64 already completed and 87 in the pipeline. That puts it ahead of South Florida on 103 and New York on 32, the next two largest markets. Dubai did not just enter this sector, it now leads it, and the pipeline figure tells you the lead is being extended, not defended.

151
BRANDED-RESIDENCE SCHEMES IN DUBAI (64 DONE, 87 PIPELINE)
Savills 2025/26

103
SCHEMES IN SOUTH FLORIDA, THE SECOND MARKET
Savills 2025/26

32
SCHEMES IN NEW YORK, THE THIRD MARKET
Savills 2025/26

Zoom out and the sector itself is expanding fast. Savills counts roughly **611 branded-residence schemes globally today, forecast to reach around 1,019 by 2030**. Dubai is not riding a niche, it is leading the fastest-growing corner of global prime residential, and its share of a growing pie is itself growing.

◆ WHY DUBAI LEADS

The fit is structural. Dubai's buyer base is overwhelmingly international and mobile, its off-plan machine can deliver large branded towers at scale, and its developers compete on brand as much as location. That combination is why the pipeline is 87 schemes deep, more than any rival market has completed.

◆ THE FIRM FACT

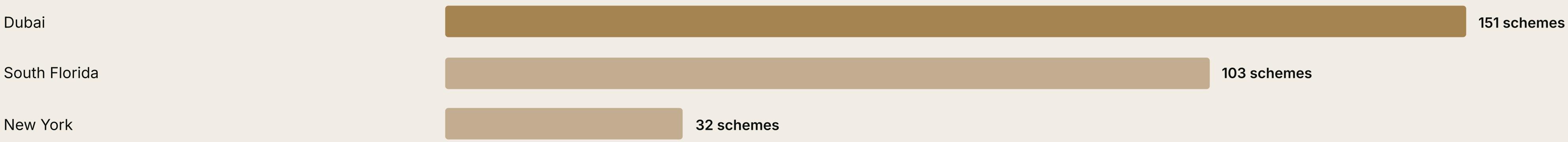
"By scheme count, Dubai is the world's number one branded-residence market. That one is not a claim. It is in the count."

CHAPTER 02 · THE GROWTH

A Sector Nearly Doubling by 2030

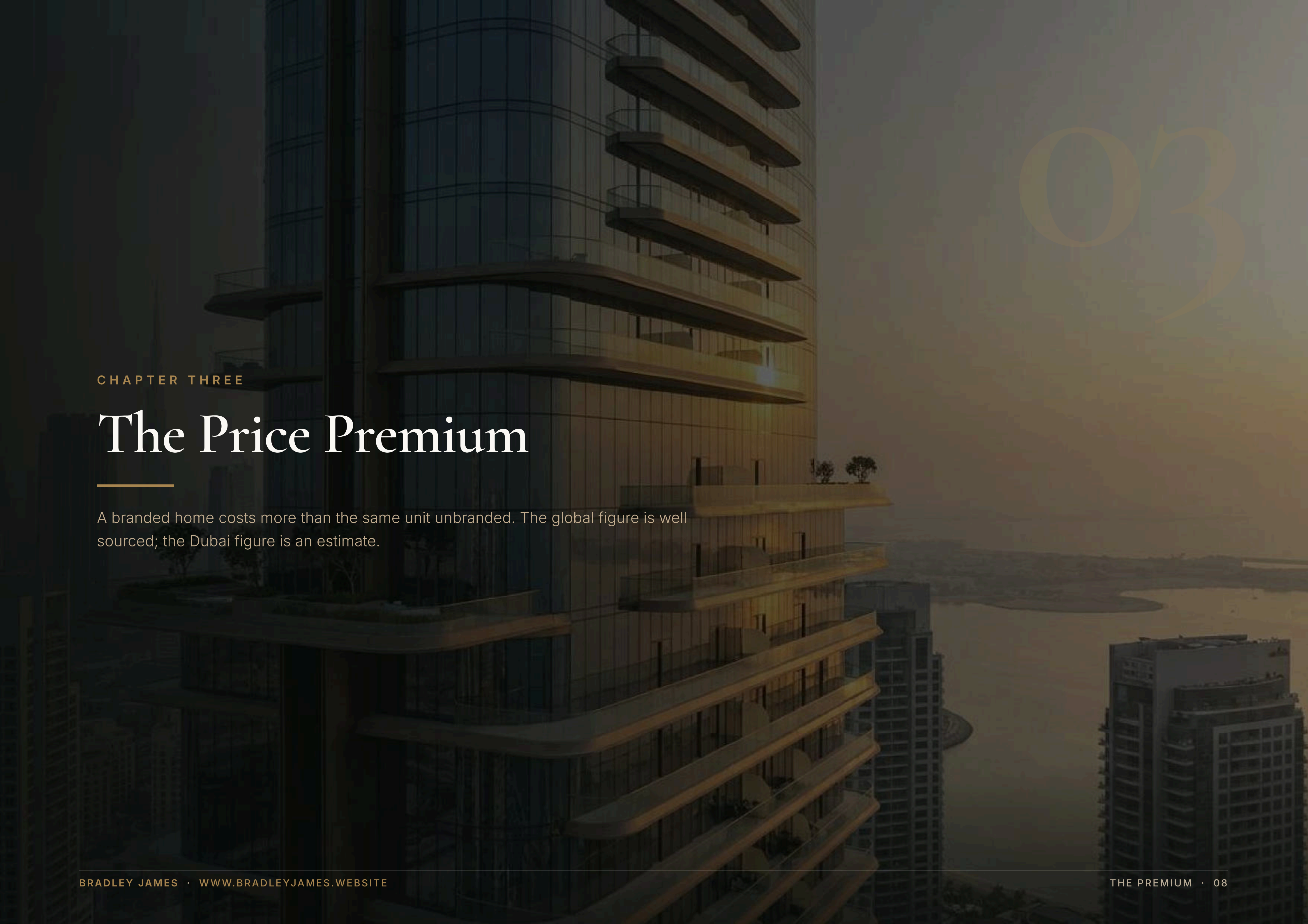
The global picture frames why developers keep launching. The branded-residence sector has grown from a handful of schemes three decades ago to around 611 today, and is forecast to approach 1,019 by 2030. Dubai sits at the front of that curve, and its own 87-scheme pipeline is a large part of the global growth number.

BRANDED-RESIDENCE SCHEMES: THE LEADING MARKETS



Savills Branded Residences 2025/26. Dubai's 151 is 64 completed plus 87 in the pipeline, the world's largest count by both totals.

Hold that pipeline figure in mind, because it cuts two ways. It confirms Dubai's leadership and the depth of choice for a buyer. It also raises a fair question we return to later: when 87 more schemes arrive, does the scarcity that justifies a branded premium start to thin out?



CHAPTER THREE

The Price Premium

A branded home costs more than the same unit unbranded. The global figure is well sourced; the Dubai figure is an estimate.

CHAPTER 03 · WHAT YOU PAY EXTRA

The Premium, Sourced and Estimated

A branded residence sells at a premium to an equivalent unbranded home in the same location. That is the whole commercial logic of the model, and it is measurable.

On the sourced global figures, state it firmly. Savills puts the **global average branded premium at around 33%**, split by segment into roughly **30% for urban schemes and 39% for resort schemes**, where the lifestyle and scarcity are strongest. Knight Frank's Global Branded Residences Survey reads the global premium at **around 30%**. Two independent houses, converging near a third on top. That is a well-evidenced number.

For Dubai specifically, the commonly cited figure is **around 40%**, with some schemes quoted far higher. Treat that as a market estimate, not a settled statistic. The 40% Dubai premium, and the occasional **ceiling figure near 64%** for the most sought-after ultra-prime branded product, are secondary reads drawn from asking prices and broker analysis, not from a single audited index. They point to a real and larger-than-global Dubai premium, but the precise number should be checked scheme by scheme, never assumed.

~33%
GLOBAL AVERAGE BRANDED PREMIUM
Savills

~30%
GLOBAL BRANDED PREMIUM, SECOND READ
Knight Frank

~40%
DUBAI PREMIUM, MARKET ESTIMATE
Secondary / market read

◆ SOURCED VS ESTIMATED

The 30% to 33% global premium is well documented across Savills and Knight Frank, so lean on it. The Dubai 40% and the 64% ceiling are estimates from asking prices, so use them directionally and verify the specific scheme against comparable unbranded sales before you pay for the badge.

◆ THE DISCIPLINE

"Pay the premium on evidence, not on a headline. The global 30% is a fact. The Dubai 40% is a hypothesis you confirm scheme by scheme."

CHAPTER 03 · URBAN VERSUS RESORT

Where the Premium Is Largest

The premium is not one number, it is a spread, and knowing where you sit in it matters. Resort schemes command the top of the range because the brand, the setting and the scarcity all compound. Urban schemes sit lower because the location does more of the work on its own.

BRANDED PRICE PREMIUM OVER AN EQUIVALENT UNBRANDED HOME

Savills global and segment figures; Knight Frank reads the global average near 30%. The Dubai ~40% is a secondary market estimate, not an audited index figure.

The practical lesson: the more the location can stand on its own, the smaller the branded premium you should be willing to pay, because the brand is adding less. The premium is worth most where the brand supplies something the address cannot, which is exactly the test we build in the final chapter.

04

CHAPTER FOUR

Who Actually Buys Them

The branded buyer is a specific person with a specific need. Understand the demand and you understand the resale pool.

CHAPTER 04 · THE DEMAND

The International, Time-Poor Buyer

Branded residences are bought by a narrow, well-defined pool: ultra-high and high-net-worth international buyers who value prestige, want a turnkey home, and will pay for services and certainty. They are usually asset-rich and time-poor, and they treat the branded premium as a price worth paying to remove friction.

- Prestige. The address and the name carry social and reputational weight, which for this buyer is part of the return, not a vanity.
- Turnkey ownership. The home is finished, furnished to standard and ready to occupy or let, with no fit-out project to run.
- Services. Concierge, housekeeping, security and amenities are built in and professionally run, not something the owner has to arrange.
- Lock-up-and-leave. Many owners hold the home as one of several residences, so a building that maintains and secures itself while they are away is the core appeal.

This matters commercially, not just descriptively. A branded residence resells into the same pool of international prestige buyers who bought new, so the depth and durability of that pool is the single biggest driver of whether your premium survives to resale. A scarce brand in a global-gateway city keeps that pool deep. A common one in an oversupplied segment does not.

◆ THE PRESERVATION FIT

For a capital-preservation buyer, the appeal is the services and the standards floor, not the badge. A professionally run building holds its condition, which protects value over a long hold. That is a genuine reason to pay a premium, provided the running cost is understood and modelled.

◆ THE RESALE TRUTH

"You do not sell to the whole market. You sell back to the same international prestige buyer who bought new. Keep that pool in view."

05

CHAPTER FIVE

The Yield Question

A brand can lift the rent. It also lifts the running cost. Model the net, never the gross, or the premium fools you.

The Brand Lifts Rent and Cost Together

The rental case for a branded residence is genuinely two-sided, and most pitches only show you one side. A brand can lift the rent you achieve. It also lifts the cost of holding the asset. Whether it pays comes down to which effect is larger, net.

On the upside, a branded home can command a rental premium and performs strongly in the short-let and serviced-apartment market, where the brand, the amenities and the professional management justify a higher nightly rate and support occupancy. Prime Dubai gross yields sit in a directional range of **roughly 5% to 8%**, and a well-run branded short-let can reach the upper part of that band.

On the downside sits the service charge. Branded buildings carry some of the highest running costs in the market, commonly **around 25 to 70 dirhams per square foot per year**, against a city-wide median nearer 17. That charge is real money leaving the asset every year, and it compresses the net yield directly. A branded scheme that quotes an attractive gross number can net materially less than an unbranded unit down the road once the service charge is deducted.

5% to 8%
PRIME DUBAI GROSS YIELD, DIRECTIONAL RANGE
Directional

AED 25 to 70
BRANDED SERVICE CHARGE, PER SQ FT PER YEAR
Directional

~17
CITY-WIDE MEDIAN SERVICE CHARGE, PER SQ FT
DLD index

◆ MODEL NET, NOT GROSS

This is the rule that keeps you honest on a branded purchase. A brand that adds 15% to the rent but 40 dirhams per square foot to the service charge can net less than the plain unit next door. Always subtract the branded service charge before you judge the yield, because the gross figure is designed to flatter it.

◆ THE COMPRESSION

"The brand lifts the rent with one hand and the running cost with the other. Your return is only ever what survives the difference."

06

CHAPTER SIX

The Case, and the Honest Risks

The investment case is real and the risks are real. Name both plainly, because this is where trust is either built or lost.

Why the Premium Can Be Worth It

The case for a branded residence is not hype, it is a set of structural advantages that suit a capital-preservation objective when the scheme is chosen well.

- Brand-driven liquidity. A recognised name gives a scheme an internationally legible identity, which can widen the resale pool and make the asset easier to sell to a global buyer.
- A resale premium that can persist. Where the brand is scarce and the location is strong, the premium the first owner paid can carry through to resale, so it is a price paid, not simply lost.
- Hassle-free management. Professional operation removes the work of running and letting a prime home, which for an overseas or lock-up-and-leave owner is a real, ongoing benefit.
- A standards floor. The operator is contractually bound to maintain the building to brand specification, which protects physical condition over a long hold and supports value. For capital preservation, a maintained asset is a preserved one.

Read together, these are genuinely capital-preservation traits. A well-chosen branded residence in a gateway city can be a defensive holding: liquid to an international buyer, professionally maintained, and anchored to a brand that intends to protect its own name. The operative words are well chosen.

THE PRESERVATION READ

The standards floor is the underrated part of the case. A building that must be kept to Four Seasons or Bulgari specification does not degrade quietly the way an unmanaged tower can. Over a fifteen-year hold, maintained condition is a real defence of capital, and it is contractual, not optional.

THE HONEST FRAME

"The case is strong when the premium buys something durable. It is weak when it only buys a name that anyone can license next door."

CHAPTER 06 · THE HONEST RISKS

What the Premium Can Cost You

Now the other side, stated as plainly as the case, because an honest risk view is what earns trust. Every advantage above has a matching risk, and the core tension has a name: are you buying an asset, or a name?

First, **you pay the premium up front**. A 30% to 40% premium is real capital committed on day one, and it only pays back if the premium survives to resale. That is the whole name-or-asset question in one line. Second, **the service charge is permanently higher**. The 25 to 70 dirhams per square foot is not a one-off, it is a cost you carry every year you own, and it compounds against your net return for the life of the hold.

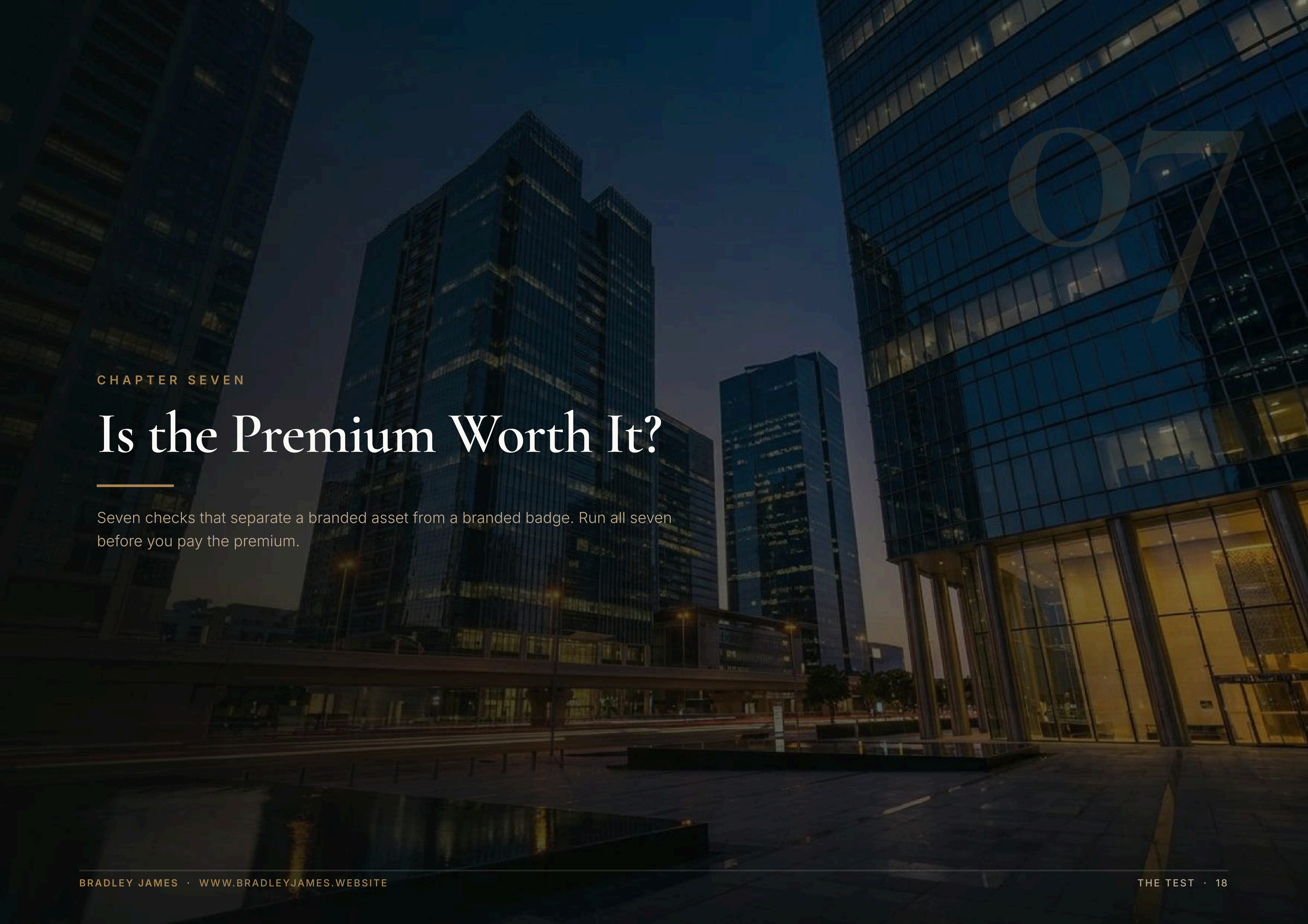
Third, and most misunderstood, is **brand and operator risk**. You own the home, but the brand is licensed to the building, not owned by you. If the operator exits, the management agreement lapses or the building is de-branded, the premium that name supported can simply evaporate, and you are left with a good apartment at an unbranded price. Fourth, **the premium may not persist on resale** if the brand turns out to be common rather than scarce. And fifth, Dubai's own **87-scheme pipeline raises a dilution question**: as more branded product arrives, the scarcity that justifies the premium in the first place is exactly the thing that can thin out.

◆ DE-BRANDING, EXPLAINED

This is the risk buyers miss. The name on the building is a licence with a term, not a permanent fixture. Read the operator agreement: how long is the term, what triggers an exit, and what happens to the brand if it lapses. A de-branded residence loses the very thing you paid the premium for.

◆ NAME OR ASSET

"The premium is worth it when it buys a durable asset. It is a cost when it only buys a name that can be removed. Know which one you are buying."



07

CHAPTER SEVEN

Is the Premium Worth It?

Seven checks that separate a branded asset from a branded badge. Run all seven before you pay the premium.

Seven Tests Before You Pay

A branded premium is worth paying only when the brand adds something the plain unit next door cannot. Here is how to test that, before you commit a dirham of premium.

1. **Is the brand genuinely scarce?**
A rare, sought-after name supports a premium. A common one, launching across several towers, does not. Scarcity is the premium's foundation.

2. **Does the location stand alone?**
Would you want this address unbranded? If yes, the brand is a bonus, not a crutch. If the brand is doing all the work, be cautious.

3. **Do the services justify the charge?**
Price the 25 to 70 dirhams per square foot against what you actually get and would actually use. A charge you do not use is pure yield erosion.

4. **What is the net yield, not the gross?**
Subtract the branded service charge, management and voids. If the net trails an unbranded comparable, the brand is costing you income.

5. **How deep is the resale pool?**
Is there demonstrable international demand for this brand in this city? A deep pool preserves the premium. A shallow one strands it.

6. **What do the operator terms say?**
Read the management agreement: the term length, the exit triggers and the de-branding provisions. Know what you own if the name leaves.

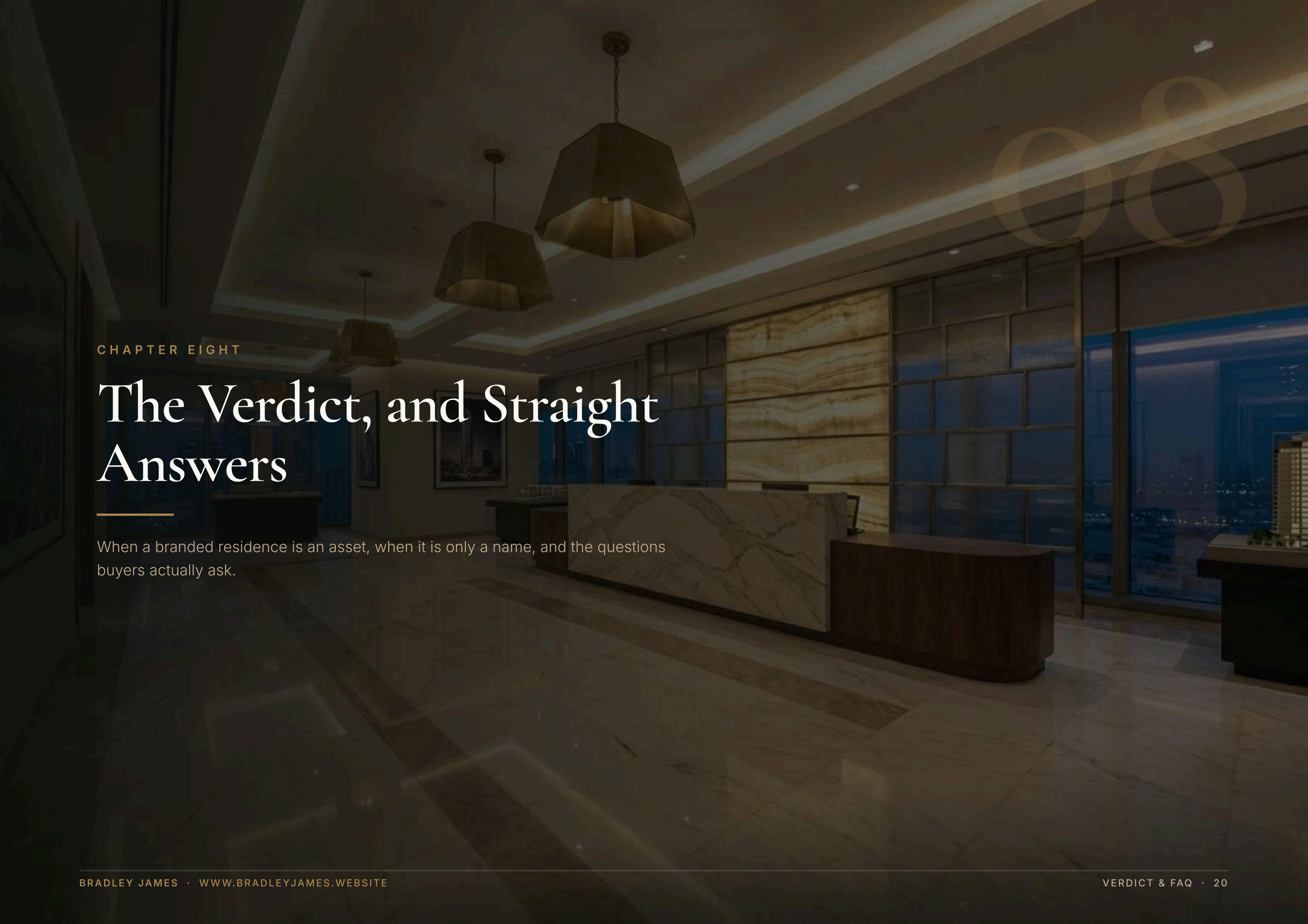
7. **What is the supply pipeline?**
Check how many competing branded schemes are due nearby. A wave of new supply can dilute the scarcity your premium depends on.

◆ THE ONE-LINE TEST

If the brand is scarce, the location stands on its own, the services earn their charge, the net yield holds up and the resale pool is demonstrably wider, the premium is buying an asset. Fail two or more of those, and you are paying for a name.

◆ BEFORE YOU SIGN

"Run all seven. The buyers who overpay for a badge are the ones who checked the brochure and skipped the agreement."



08

CHAPTER EIGHT

The Verdict, and Straight Answers

When a branded residence is an asset, when it is only a name, and the questions buyers actually ask.

CHAPTER 08 · THE VERDICT

Name, or Asset?

So, name or asset? The honest answer is that a branded residence can be either, and the scheme decides which.

It is an **asset** when four things line up: the brand is scarce, the location stands on its own, the services genuinely justify their charge, and the resale pool is demonstrably wider because of the name. When those hold, the premium you pay is buying real, durable value: liquidity to an international buyer, a maintained building and a premium that can persist to resale. For a capital-preservation investor, that is a legitimate and defensive holding.

It is only a **name** when those tests fail: a common brand, a location that needed the badge to sell, services you will not use at a charge that eats your yield, and a pipeline of competing schemes waiting to dilute the scarcity. In that case the premium is a cost you pay on entry and struggle to recover on exit. Dubai leads the world in branded residences, which means it offers both the finest examples of the asset and the greatest volume of the merely branded. The discipline is in telling them apart, and that is exactly the work the checklist does.

◆ THE BOTTOM LINE

Pay the premium when the brand is scarce, the location stands alone, the services earn their keep and the resale pool is wider for the name. Otherwise you are buying a badge at an asset price, and the market will remind you of the difference on the day you sell.

◆ THE FINAL WORD

"A great branded residence is an asset with a name on it. A poor one is a name with an asset attached. Buy the first, never the second."

CHAPTER 08 · STRAIGHT ANSWERS

The Questions Buyers Actually Ask

Q. Is Dubai really the world's biggest branded-residence market?

Yes, by the number of schemes. Savills counts 151 schemes in Dubai for 2025/26, being 64 completed and 87 in the pipeline, ahead of South Florida on 103 and New York on 32. It is the largest such market on earth by count, and its pipeline is extending the lead.

Q. How much more does a branded residence cost?

Globally, around 30% to 33% more than an equivalent unbranded home, with Savills reading urban schemes near 30% and resort schemes near 39%. In Dubai the commonly cited premium is around 40%, with a ceiling figure near 64% for the most sought-after product. Treat the Dubai figures as market estimates and check the specific scheme against comparable unbranded sales.

Q. Do branded residences make good rental investments?

They can, but you must model net, not gross. A brand can lift the rent and performs well in the short-let market, where prime Dubai gross yields run a directional 5% to 8%. But branded service charges of roughly 25 to 70 dirhams per square foot compress the net return, so always subtract the running cost before you judge the yield.

Q. What happens if the brand leaves the building?

The premium can evaporate. You own the home, but the brand is licensed to the building, not owned by you. If the operator exits or the building is de-branded, you may be left with a good apartment at an unbranded price. Read the operator agreement for the term, the exit triggers and the de-branding terms before you buy.

Q. Will the premium hold when I sell?

It holds best when the brand is scarce and the location is strong, so the resale pool of international buyers stays deep. It is at risk when the brand is common or when a wave of new branded supply dilutes the scarcity. This is why the resale pool and the local pipeline are two of the seven checks before you pay.

Q. So is a branded residence worth it or not?

It is worth it when the brand is scarce, the location stands alone, the services justify their charge, the net yield holds and the resale pool is demonstrably wider. When those line up you are buying an asset. When they do not, you are paying a premium for a name, and the difference shows up on the day you sell.

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WORK WITH BRADLEY JAMES

Name, or Asset? Let's Find Out.

◆ ABOUT BRADLEY

Not a broker, an advisor. I built a business in the UK and spent more than a decade advising people from all walks of life, before moving to Dubai and joining M&M Real Estate to work at a higher strategic level than the typical transactional broker. I specialise exclusively in off-plan investment for overseas and high-net-worth clients, I put my own capital into the projects I recommend, and my business is more than 80% referral-driven, because every client came through someone who trusted me first.

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