



WRITTEN BY HELEN PARTON

SECTOR REPORT: **BUILD TO RENT**

COMMERCIAL-INTERIORSUK.COM





WRITTEN BY

HELEN PARTON



Helen Parton is an architecture and interiors journalist. She has written for a wide variety of trade magazines in the architecture and design sector and edited workplace design magazine *OnOffice* for three years from 2015 to 2018.

In 2011, she co-authored a book by Thames and Hudson titled *Total Office Design*. Helen is currently a freelance editorial consultant and event moderator. Most recently, she authored two previous Commercial Interiors UK Workplace Sector Reports on *Workspace* and *Senior Living*. She has an interest in raising awareness of how more thoughtful design of buildings, particularly workspaces, can lead to a democratisation of space and a more pleasant experience for everyone. To this end, she has another book being published by RIBA Publishing which comes out in autumn 2026 entitled *Sensing Spaces* which deals with neurodiversity and the built environment.

FOREWORD

BY SEAN HOLT

MANAGING DIRECTOR

COMMERCIAL INTERIORS UK



At Commercial Interiors UK (CIUK), we are proud to represent and champion the UK's commercial furnishing sector. Our mission is clear: to support our members, commercial interior furnishing suppliers, with the advocacy, connections, and insight needed to succeed.

Every initiative we deliver, from creating opportunities for collaboration, to opening international markets, to providing resources that help navigate change, is designed with one goal: to help our members thrive in a fast-moving landscape.

This Build to Rent Sector Report is a powerful example of that commitment. Authored by respected architecture and interiors journalist Helen Parton, it combines timely data, sector analysis, expert perspectives, and emerging opportunities to illuminate an important area of the residential market.

Build to Rent is developing rapidly, both in scale and in the expectations placed on the homes and shared environments it creates. As the sector matures, the emphasis is shifting away from generic approaches and an amenity 'arms race' towards more considered, community-led developments that respond to specific audiences, locations and lifestyles. The boundaries between Build to Rent, PBSA, co-living and hospitality are also becoming blurred.

This report explores what those changes mean for the commercial interiors industry, from warmer, more homely interiors and durable products, to flexible solutions for compact environments and amenity spaces that need to work harder. It also considers the importance of localisation, personalisation, operational efficiency and whole-life value.

What makes this report especially valuable is its practical relevance. It is tailored for commercial interiors professionals,

manufacturers, suppliers, specifiers and designers who need clear, sector-specific intelligence to shape strategy, develop products, align marketing and drive sales.

As a CIUK member benefit, the full report is available free to download from our Members' Area, one of many exclusive resources we invest in as part of your membership.

For commercial interior furnishing suppliers who are not CIUK members, the report is available to purchase by anyone looking to better understand and respond to the forces influencing Build to Rent.

I'd also like to extend a personal invitation. If you have thoughts, feedback, or would like to discuss how CIUK can support your business, I'd love to hear from you at sean@commercial-interiorsuk.com

Together, we can continue to build a thriving, future-focused commercial interiors industry, driven by innovation, shaped by collaboration, and supported by a strong, connected community.

SEAN HOLT

MANAGING DIRECTOR

COMMERCIAL INTERIORS UK

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INTRODUCTION

In common with previous Design Insider Sector Reports, the insight from this report will be invaluable for Commercial Interiors UK members in terms of understanding not only how the Build to Rent sector is developing but also what is happening in allied sectors, particularly PBSA.

By understanding the market direction, manufacturers can better develop new products which meet end user needs and therefore positively impact their revenue and bottom line.

Among the core insights from Tomorrow's Build-to-Rent Brands report, which was an output of Build-To-Rent Marketers J2's Marketing Day at this year's UKREiF event, are some pertinent ones for the design sector to note:

- **Sharper targeting** - By focusing on a specific life stage, interest group, or shared value, BTR brands can build deeper and more meaningful connections.
- **Build the tribe** - Strong communities are built around shared values, interests and aspirations.
- **A system for strong localisation** should create a system flexible enough for every location to reflect the character, culture and needs of its own community.
- **Collaborating on apartment interiors with a noteworthy designer** could help tailor a scheme to a specific audience as part of its aspirational partnerships to add influence.

These point to a Build to Rent sector that is maturing beyond generic amenity offers towards something more considered and community-led. For manufacturers and designers alike, that shift represents a real opportunity: create concepts that speak to a specific audience and reflect local character and end users' values. This approach is far more likely to resonate with operators and residents than a one-size-fits-all approach.

As BTR and PBSA continue to influence one another, Commercial Interiors UK members who track emerging brand strategies in both these sectors will be best placed to shape the next generation of product launches and building openings that this fast-evolving sector demands. ■

**Image credits:**

Left: The Gessner. F.R.A. Photo - Billy Bolton

Right: The Sessile. F.R.A. Photo - Simon Callaghan

**WE'VE IDENTIFIED FIVE KEY TRENDS
CURRENTLY SHAPING THE BTR MARKET:**

**THEME 1: GROWING SECTOR
CROSSOVER**

**THEME 2: WARMER, MORE
HOMELY INDIVIDUAL
INTERIORS**

**THEME 3: GREATER DURABILITY
OF FINISH**

**THEME 4: FLEXIBILITY OF
PRODUCT IN COMPACT
ENVIRONMENTS**

**THEME 5: A MOVE AWAY
FROM THE AMENITY
'ARMS RACE'**
OUR EXPERT CONTRIBUTORS INCLUDE:
FRANCESCA CALLISTO

 Senior Asset Manager
HUB
HANNAH LODGE-BAKER

 Co-Founder and Head of Interior Design
201 LYVN
JASPER SANDERS

 Director
JASPER SANDERS + PARTNERS
RACHEL COLL

 Founding Director
TIGGCOLL
WESLEY MEYER

 Creative Director
F.R.A.



1.0

CURRENT STATE OF MARKET

The Build to Rent sector has opened 2026 with real momentum. Savills recorded £795 million of investment in the first quarter, the strongest Q1 since 2022, a clear sign that investors are backing the sector again after a quieter 2025.

The figures cover 12 core UK cities: Belfast, Birmingham, Bristol, Cardiff, Edinburgh, Glasgow, Leeds, Liverpool, Manchester, Newcastle, Nottingham and Sheffield. Across these markets, the BTR pipeline reached around 108,000 units by the end of Q1, up 3% year-on-year, as schemes, both new-build and forward-funded, kept coming through.

Growth wasn't even everywhere, as Single Family Housing got off to a slower start, and urban multifamily activity stayed subdued, with planning delays, building safety requirements and rising construction costs all playing a part. Savills, though, expected things to pick up through Q2.

They were right and Knight Frank puts Q2 investment at more than £2 billion, powered by a handful of major deals. Morgan Stanley and Ridgeback's purchase of the L&Q portfolio for over £1 billion was one highlight; Greystar's acquisition of 912 units from CPP at Elephant Park in South London, for around £500 million, was another, both strong positive signs.

Greystar's Development Director, Bronwyn Jones talks about what is happening right now for them:

"Rather than chasing the highest achievable rent in the strongest locations, more developers are underwriting a mid-market rent

that a much larger pool of renters can actually afford - and taking that product into a broader range of locations where mid-market is the natural fit."

The real difference with older stock, she adds, comes down to:

"Quality of design and quality of service - a well-planned home, durable materials, professional management, responsive maintenance. What is being scaled back is the very top end of the amenity offer: the extensive, lightly used facilities that only make sense where rents can carry them. Those buildings still have a place in the right locations, but they are no longer the default template. For designers, that shifts where the value has to come from: base plan efficiency, specification longevity and whole-life running costs, rather than amenity square footage."

Completed BTR stock across the UK now stands at 166,359 homes, according to Knight Frank, up 17% on last year. Another 49,620 homes are under construction, with a further 125,639 working their way through planning, so delivery looks set to keep climbing.



AT A GLANCE: STATS SNAPSHOT

£2BN+

MORE THAN £2 BILLION WAS INVESTED IN UK BUILD TO RENT IN Q2 2026, DRIVEN BY SEVERAL MAJOR TRANSACTIONS.

166,359

COMPLETED BUILD TO RENT STOCK ACROSS THE UK NOW STANDS AT 166,359 HOMES, UP 17% YEAR-ON-YEAR.

175,259

A FURTHER 49,620 BTR HOMES ARE UNDER CONSTRUCTION, WITH 125,639 MORE PROGRESSING THROUGH PLANNING.

108,000

AROUND 108,000 BTR UNITS WERE IN THE PIPELINE ACROSS 12 CORE UK CITIES AT THE END OF Q1 2026, UP 3% YEAR-ON-YEAR.

Just over 6,700 BTR homes have completed so far in 2026. London and Tier 1 cities such as Manchester and Birmingham account for close to half of that total. Tier 2 cities, including Nottingham, Liverpool and Sheffield, made up 14% of completions, with another 14% spread across smaller towns and regional locations, a sign that growth is spreading well beyond the biggest markets. Knight Frank also notes that widening gaps between buyer and seller expectations are stretching out deal timelines, a trend likely to continue.

CBRE expects BTR investment to hold up well through 2026 as inflation eases, even with affordability pressures still weighing on renters. Yields are forecast to stay broadly stable for most of the year, with room to tighten towards year end if activity builds. Alongside continued rental growth, that should support rising capital values across the sector.

“

FOR DESIGNERS, THAT SHIFTS WHERE THE VALUE HAS TO COME FROM: BASE PLAN EFFICIENCY, SPECIFICATION LONGEVITY AND WHOLE-LIFE RUNNING COSTS, RATHER THAN AMENITY SQUARE FOOTAGE.



Image credit:

3 & 15 West Lane. HTA Design. Photo - Kilian O'Sullivan

2.0

SPECIFICS
OF THE
MARKET

Build to Rent (BTR) is changing the way people think about renting. No longer simply a collection of apartments managed under one roof, the sector has evolved into a diverse residential landscape, with different models responding to different lifestyles, locations and resident needs.

The UK Government's Planning Practice Guidance defines BTR as purpose-built housing designed specifically for private rent, typically held in single ownership and professionally managed. The model is fundamentally different from traditional housing for sale, with the long-term resident experience, quality of management and a wider offer of the development all forming part of the proposition. Within the sector, three key subsectors have emerged: Multifamily Housing (MFH), Single Family Housing (SFH) and Co-Living and it's worth considering how to define each of them.

Multifamily Housing remains the most established BTR model. More commonly found in urban and higher-density locations, MFH schemes typically bring together apartments, shared amenity spaces and professional management within a single development. Gyms, lounges, co-working areas, private dining spaces, terraces and social spaces are increasingly considered an integral part of the resident experience rather than an added extra.

Multidisciplinary studio HTA has worked with a number of developers in the BTR sector, among them Greystar and Grainger. One of its most recent projects in the sector was two new residential buildings which are operated by Vertus, Canary Wharf Group's build-to-rent arm. Communal amenities include



Image credit: 3 & 15 West Lane, HTA Design. Photo - Kilian O'Sullivan

lounges, co-working spaces, private dining, a gym, and three roof terraces. The interiors responded to the client's brief of 'fun and flair', drawing inspiration from the cinematic world of Wes Anderson. A curated material palette includes a striking rippled fabric wall at the entrance lobby, blending tactile appeal with retro and contemporary influences. The apartments offer a calming retreat, with bespoke joinery, fully equipped kitchens, and smart bathroom suites that maximise space without compromising comfort.

Single Family Housing, meanwhile, is bringing the BTR model into suburban, commuter locations and places on the rural urban fringe. Rather than apartments, SFH provides purpose-built rental houses, often arranged as larger neighbourhoods with shared landscaping, amenities and community facilities. Its growth is particularly significant as the sector looks beyond the traditional 'young professional' demographic towards families and longer-term renters. SFH now accounts for around a quarter of BTR homes under construction.

Co-Living, on the other hand, occupies a slightly different position, placing



THREE DISTINCT MODELS SHAPING TODAY'S BTR MARKET

1

MULTIFAMILY HOUSING: URBAN, AMENITY-LED LIVING

The most established BTR model, typically combining apartments with professional management and shared spaces such as gyms, lounges, co-working areas, private dining and terraces in urban, higher-density locations.

2

SINGLE FAMILY HOUSING: BTR MOVES INTO THE SUBURBS

Purpose-built rental houses are extending BTR into suburban, commuter and rural-urban fringe locations, broadening the market towards families and longer-term renters. SFH now represents around a quarter of BTR homes under construction.

3

CO-LIVING: COMMUNITY AT THE CORE

Private studio-style homes are supported by generous shared kitchens, lounges, workspaces and social areas, placing interaction and access to community at the centre of the resident offer.

community and interaction at the heart of the proposition. Residents typically have private studio-style accommodation, supported by generous, shared kitchens, lounges, workspaces and social areas. The emphasis is not simply on providing somewhere to live, but on creating opportunities for people to connect. A recent example of this is the Yardhouse by Moda which will launch in White City, West London, this November. It consists of 209 private studios, and shared areas and a programme of events. Central to the design is the idea that social connection is not about constant company but connection when you want it. Facilities include a 24-hour gym, co-working areas and booths and communal dining spaces plus two rooftop terraces and the Sky Lounge look out across the capital.

Greystar's Development Director, Bronwyn Jones gives her experience of the various subsectors and the impact on how they are designed:

"In urban multifamily 60% of households are couples or sharers, compared with 43% in the wider private rented sector. Families make up only 6% of households. That reflects a stock that is overwhelmingly apartments, and mostly one- and two-beds.

The 25–34 band is the most common for both BTR and wider private rented sector residents, and the average share of gross household income spent on rent sits close to 30% for both - slightly higher for single tenants and lower for couples and sharers.

That is the commercial logic behind the mid-market focus. The renters who can comfortably sustain top-end rents are a small group, and the pool broadens substantially as you move down the rent curve. Designing for that wider pool means smart, efficient

one- and two-beds with genuine parity between bedrooms for sharers. It also raises the bar on service and design quality rather than lowering it. A mid-market renter is choosing between a professionally managed BTR home and a cheaper second-hand flat, so the reasons to choose BTR have to be visible in the everyday experience of the building: the quality of design, the storage provision, the acoustics, the way maintenance gets dealt with."

Canvas Arthur House in Wembley is one of Greystar's latest PBSA projects with interior architecture by TiggColl. The interiors were designed around six core principles: connection to nature, social connectedness, physical activity, mindfulness, nutrition and sleep which has translated into a collection of social and study spaces where students feel supported. The ground floor, for instance, includes a reception, student lounges, co-working and study areas, meeting and breakout rooms, and a gym and yoga studio.

Regulation is adding another layer of complexity for the built environment sector with BTR and PBSA no exception.



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SPECIFICS OF THE MARKET (CONT):

The Building Safety Act and its Gateway process have altered project programmes. Imogen Woodage, Associate Director with SpaceInvader puts this into context from a designer's point of view,

"The extent of the time required for projects to progress through the Gateway 2 process remains uncertain until projects are formally submitted. This places a significant responsibility on the design team to ensure that the information produced is comprehensive, coordinated, and sufficiently detailed to withstand the scrutiny of the Gateway 2 assessment, with the aim of minimising the potential for clarification requests or, in the worst-case scenario, rejection of the submission. Any gaps or inconsistencies within the design documentation could result in additional queries and iterations, resulting in a prolonged programme and additional cost. The Work Stage 4 design period, therefore, is more thorough and detailed than before, however should be viewed positively, as it provides the opportunity to fully interrogate and resolve all design aspects and consider the relevant technical requirements in greater depth, ensuring the interfaces between disciplines and design team consultants are

entirely coordinated. Achieving this level of design development at this stage requires a significant amount of additional time, it's therefore critical that sufficient time is built into the overall design programme to allow for this and ensures the design teams are prepared as possible for an efficient application process."

At the same time, the Renters' Rights Act is expected to require relatively little adjustment from many institutional BTR operators already accustomed to professional management and longer-term rental models.

Looking ahead, the BTR landscape is likely to become increasingly varied. The opportunity is not simply to deliver more homes, but to think more carefully about how those homes support the people who live in them. As the boundaries between BTR, co-living, PBSA, hospitality and even workplace environments continue to blur, design will have an increasingly important role to play in creating places that are commercially viable, operationally effective and, crucially, feel like somewhere people genuinely want to live. ■

£2BN+

RECORD QUARTER FOR BTR INVESTMENT

More than £2 billion was invested in UK Build to Rent in Q2 2026, the largest individual quarter on record for spend.

SOURCE 1: KNIGHT FRANK, UK BTR MARKET UPDATE, Q2 2026



13% DOWN / 29% DOWN CONSTRUCTION PIPELINE UNDER PRESSURE

CBRE reported a 13% year-on-year fall in BTR construction volumes in Q3 2025, rising to a 29% fall in London.

SOURCE 3: CBRE RESEARCH, 2026 UK REAL ESTATE MARKET OUTLOOK, JANUARY 2026

166,359

COMPLETED BTR HOMES ACROSS THE UK

Completed Build to Rent stock reached 166,359 homes, up 17% year-on-year.

SOURCE 1: KNIGHT FRANK, UK BTR MARKET UPDATE, Q2 2026



20–40%

AFFORDABLE RENT REQUIREMENTS

Many BTR schemes carry affordable rent quotas of around 20–40% of units, depending on local authority policy and viability assessments.

SOURCE 4: REALYSE, 'COUNCIL HOUSEBUILDING REVIVAL: WHAT ANDY BURNHAM'S SOCIAL HOUSING PUSH MEANS FOR BTR INVESTORS', 29 JULY 2026

68%

INVESTMENT IS FLOWING INTO OPERATIONAL STOCK

Operational assets accounted for 68% of UK BTR investment in Q1 2026, with more than three-fifths of that investment in London.

SOURCE 2: SAVILLS, UK BUILD TO RENT MARKET UPDATE – Q1 2026, 1 APRIL 2026



WHAT IS BEING BUILT?

Apartment-led multifamily accounts for 71% of BTR homes currently under construction, while Single Family Housing represents around a quarter.

SOURCE 1: KNIGHT FRANK, UK BTR MARKET UPDATE, Q2 2026



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FOCUS AREAS FOR THE BTR SECTOR

CROSSOVER // INDIVIDUALITY // DURABILITY // FLEXIBILITY // AMENITY CHANGE



Image credit: 3 & 15 West Lane. HTA Design. Photo - Kilian O'Sullivan



Image credit: The Keel. Jasper Sanders & Partners

GROWING SECTOR CROSSOVER

The lines between build-to-rent, student accommodation, co-living and even senior living are blurring, and the smartest operators are leaning into it rather than fighting it.

There's a genuine demographic pathway taking shape, with residents and design lessons moving between typologies as people progress from PBSA into entry-level BTR, then into larger family schemes. The core discipline stays consistent throughout: understand how people actually want to live but what changes is the detail. Student schemes now lean harder on dedicated workspace than they once did, though hybrid working has closed that gap. Hospitality lends lessons on service and experience, while BTR returns the favour with insight on longevity and operational efficiency, a genuinely two-way exchange that's sharpening standards across the board.

It's worth looking into Stride Treglown's work: the practice has delivered more than 37,000 PBSA beds across the UK, including one of the largest Passivhaus student schemes in Europe, supporting the universities' net-zero 2030 strategy. The design cuts energy use via air source heat pumps and photovoltaics, while natural interior finishes and courtyard layouts boost wellbeing. Bedroom typologies range from cluster flats to studios, shaped by student consultation. New green corridors deliver a 51.4% biodiversity net gain, and a tree-lined boulevard connects a communal study hub, dining room, and flexible exercise/cinema space across campus. ■



QUICK INSIGHTS

OPPORTUNITIES FOR SUPPLIERS:

- **Shared interior thinking** – PBSA, BTR, co-living and senior living now share amenity standards, finish quality and design thinking.
- **The lifetime resident journey** – People move from student living into starter rental homes, family schemes, and eventually ownership.
- **Appropriate places to work** – Remote work has narrowed the workspace divide between student schemes and mainstream rental housing.
- **Shared learnings** – Operators trade knowledge both ways, with rental housing offering hospitality lessons in efficiency and longevity.

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FOCUS AREAS FOR THE BTR SECTOR



Image credit: Moda Living



QUICK INSIGHTS

OPPORTUNITIES FOR SUPPLIERS:

- **Beyond corporate interiors** – Moving towards warmer, more lived-in atmospheres.
- **Layered lighting** – Pendants, wall lights and table lamps replace single central fittings for a homelier feel, as seen in one scheme's kitchen island cluster.
- **Honest materials** – Timber, brass and textured glass soften harder elements like concrete and exposed steel, echoed in warm cherry panelling and oak flooring.
- **No more dead lobbies** – Open mesh ceilings, sightlines and seating pockets encourage residents to pause and linger rather than pass straight through.
- **Personalisation** – Built-in shelves and headboards let residents showcase belongings without a single wall fixing.

WARMER, MORE HOMELY INDIVIDUAL INTERIORS

A highly corporate look and feel is out; as the sector is turning its back on the sterile hotel-lobby look in favour of interiors that feel lived-in, and lighting is doing much of the heavy lifting.

Rather than a single central fitting, designers are layering pendants, wall lights, table lamps and decorative pieces, one of the simplest ways to make a space feel warmer and more personal.

Tactile, honest materials such as timber, brass and textured glass are softening the palette further, as is cherry panelling and oak flooring, offsetting harder structural elements like concrete and exposed steel.

Entrance and amenity spaces in particular are getting close attention, using open mesh ceilings and stepped walls to avoid the dead lobby feeling residents often pass straight through. Soft lighting, sightlines and seating pockets invite people to linger.

Personalisation is the other driver behind this shift. Residents want their spaces to feel like their own, echoed in built-in shelves and headboards that let them personalise without a single nail in the wall. ■


Image credits:

Left: 18 Canvas Arthur House. TiggColl.

Photo - James Retief

Right: 18 Canvas Arthur House. TiggColl.

Photo - James Retief

GREATER DURABILITY OF FINISH

Longevity has moved from nice-to-have to a non-negotiable. Commercial-grade fabrics and finishes are being specified precisely because they can withstand years of heavy everyday use without ever looking or feeling commercial.

Durability and desirability are no longer treated as opposing forces in this sector; the two now sit comfortably side by side.

Large-format tiles are having a real moment, prized for their reduced grout lines and calmer, more seamless finish, as well as the practical upside of easier long-term maintenance.

There's also a noticeable shift towards refurbishing rather than automatically replacing. New foam, fresh upholstery or a simple refinish can give a good-quality piece a genuine second life, which ticks both the commercial and the sustainability boxes at once.

That sustainability thinking is spreading further still, with specifiers increasingly asking how long something will last, whether it can be repaired or recycled, and, crucially, whether it needs replacing at all. The true test of an interior isn't how it looks on opening day; it's how it holds up ten years later. ■


QUICK INSIGHTS
OPPORTUNITIES FOR SUPPLIERS:

- **Products built to last** – Commercial-grade fabrics and finishes endure daily wear without ever looking institutional.
- **Durability meets design** – Toughness and desirability now coexist, no longer treated as competing priorities.
- **Refurbish, don't replace** – New foam and upholstery give quality pieces a second life.
- **Sustainable specifying** – Designers now really value repairability, longevity and whether replacement is even necessary.

3.0

FOCUS AREAS
FOR THE BTR
SECTOR

Image credit: 3 & 15 West Lane. HTA Design. Photo - Kilian O'Sullivan

FLEXIBILITY OF
PRODUCT IN COMPACT
ENVIRONMENTS

QUICK INSIGHTS

OPPORTUNITIES FOR SUPPLIERS:

- **Furniture earns its keep** – Lightweight, repositionable pieces give residents more control than fixed built-ins.
- **Joinery, reimaged** – Built-in carpentry now focuses on display shelving, allowing personalisation without permanent changes.
- **Zoning without walls** – Flooring or finish changes define sleeping, eating and working areas within one room.
- **Adapting to residents life stages** – Layouts flex for singles, families and changing needs across a resident's lifetime.
- **Day-to-night amenity** – Spaces like private dining rooms double as meeting rooms depending on the time of day.

In smaller footprints, every piece of furniture has to earn its place, and increasingly that means being able to move. Lightweight, repositionable pieces, a small bistro-style table for example, are winning out over fixed built-ins, handing residents more control over how they use their own space.

Built-in joinery hasn't disappeared entirely, but its role has narrowed to things like display shelving, giving residents a way to personalise without making permanent changes.

Zoning, meanwhile, is increasingly being achieved without adding a wall. A simple change in flooring or finish is often enough to define a sleeping, eating or working area within a single room, particularly valuable in studio and one-bed layouts.

That same flexible thinking extends to how spaces need to adapt across different resident types, from singles prioritising entertaining and home working to families needing durable, adaptable layouts that can grow alongside their children.

Amenity spaces are following exactly the same logic, engineered to work equally well by day and by night, with private dining rooms doubling up as meeting spaces a prime example. ■



Image credits:

Left: 3 & 15 West Lane. HTA Design.

Photo - Kilian O'Sullivan

Right: The Sessile. F.R.A.

Photo - Simon Callaghan

A MOVE AWAY FROM THE AMENITY 'ARMS RACE'

The days of piling on ever-more elaborate amenities purely for the wow factor appear to be numbered. Early schemes were often guilty of exactly that, building vast communal spaces designed to impress rather than to be used, and the pendulum has swung hard in response. Some operators are now offering minimal amenity provision altogether, a marked change from just a few years ago.

Viability pressures have accelerated this recalibration considerably, with discretionary spend on major amenity refurbishments facing far tougher scrutiny than routine maintenance ever did.

The result is amenity space that's leaner and considerably smarter: flexible enough to serve multiple functions across day and night, rather than sitting half-used for most of the week.

None of this means amenity is disappearing altogether. Variety, wellness provision and hospitality-grade detailing all still matter enormously to residents and operators alike. But the emphasis has firmly shifted to every square metre now expected to justify its place in the scheme. ■



QUICK INSIGHTS

OPPORTUNITIES FOR SUPPLIERS:

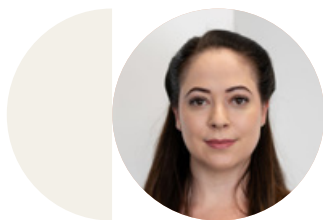
- **End of peak communal areas** – Vast spaces built for wow factor are being scaled back.
- **Minimal provision** – Some operators now offer little amenity space at all, unlike a few years ago.
- **Viability pressures** – Amenity refurbishment spend faces tougher scrutiny.
- **Multi-use by design** – Spaces are built to serve different functions across day and night.
- **Amenity still matters** – Variety, wellness and hospitality-grade detailing remain important to residents and operators.



4.0

**INTERVIEWS
WITH
EXPERTS:**

#1



FRANCESCA CALLISTO
SENIOR ASSET MANAGER
HUB

HUB



Image credit: AHMM



FURNITURE MUST BE COMFORTABLE AND APPROPRIATELY SCALED, FLOORING MUST WITHSTAND REGULAR USE, AND LIGHTING SHOULD SUPPORT COOKING, WORKING AND RELAXING.

FRANCESCA CALLISTO

As the Build to Rent sector continues to mature, interior design is becoming an ever-important differentiator. Residents increasingly look beyond location and price to the quality of the living experience, while affordability remains central.

HUB has always focused on the mid-market, but we are now seeing more developers and operators following suit after a previous market focus on higher-end products. There is strong demand for good-quality homes, flexible spaces and useful amenities that provide real value. This does not mean removing amenities altogether, but being selective and ensuring every element has a clear purpose.

For manufacturers supplying BTR developments, and sub-sectors like co-living and PBSA, the important balance is between visual appeal, durability and maintenance. Furniture must be comfortable and appropriately scaled, flooring must withstand regular use, and lighting should support cooking, working and relaxing. This is particularly important where combined kitchen, dining and living areas are serving multiple uses for residents throughout the day such as working from home, hosting visitors, or relaxing. Kitchens and bathrooms require particular attention as intensively used spaces that need to maximise the value delivered from their square footage. Dependable appliances, practical storage and robust worktops, tiling and ironmongery provide lasting value. HUB is also seeing sustainability become a greater priority, particularly among younger renters.

The BTR demographic is becoming increasingly diverse in age and background – particularly as co-living and PBSA continue to mature as sub-sectors of BTR. It is a common misconception that residents in BTR and co-living are primarily 18-to-25-year-olds, with the age bracket expanding as the sector develops. This requires a greater diversity of homes that can cater for different demographics and life stages, while retaining the fundamentals of flexibility, durability and a balance between private and shared space.

Amenity spaces should similarly respond functionally to how residents live. Across HUB's projects, ground floors increasingly incorporate publicly accessible cafés and co-working areas, connecting these developments with their neighbourhoods. Hybrid working has made co-working a greater priority, but spaces should not be overly prescribed. Natural light, adaptable furniture and spaces, and a balance of social and quieter areas allow them to serve different needs throughout the day. ■



3 KEY TAKEAWAYS

» SELECTIVE, PURPOSEFUL AMENITY DESIGN

Rather than removing amenities, focus on quality homes and flexible spaces where every element serves a clear purpose for residents.

» DURABILITY MEETS DESIGN IN HIGH-USE SPACES

Kitchens and bathrooms demand dependable appliances, robust worktops and practical storage to maximise value from every square foot.

» DESIGNING FOR A BROADER RESIDENT BASE

As BTR and co-living attract a wider range of ages and life stages, homes must balance flexibility, durability and shared versus private space.

HUB

HUB is an ambitious independent developer creating living places that move communities forward so they can thrive, now and into the future. Across UK cities, it repurposes commercial buildings into community-focused co-living schemes that revitalise central urban locations, leaving places better than before. Future focused, HUB puts people at the centre of its work, building relationships before buildings to deliver transformative, high-quality developments, from BTR-led regeneration to co-living retrofit, while reducing its impact on the environment.



4.0



HANNAH LODGE-BAKER

CO-FOUNDER AND HEAD OF INTERIOR DESIGN
201 LYVN

**INTERVIEWS
WITH
EXPERTS:**

#2

201 LYVN



Image credit: Adam Firman

The best BTR interiors are becoming less corporate and more human. For us, the focus is increasingly on resident expectations and experience.

BTR is now a much more established product, and residents aren't just comparing one BTR scheme with another; they're comparing their experience with hotels, serviced apartments, members' clubs and hospitality spaces. Working from home, wellness, socialising and convenience are all part of that comparison.

At the beginning, there was almost a race to create amazing schemes with every amenity imaginable, and that led to some developments becoming overly amenity-led, without enough consideration of what residents would actually use or be willing to pay for. The approach today is much more considered. We're asking what residents genuinely value and what supports retention and community. Developers and operators need to differentiate themselves, and we're consequently seeing much more personality, warmth and individuality.

BTR is a significant part of our workload, around 50% in revenue terms, and it's one of the sectors where we have the most extensive experience. There's a natural crossover with our sister company, Apo, and we've worked collaboratively where the opportunity and project requirements suit it. We're currently looking at replenishment across two of their schemes, covering both apartments and amenity spaces. There's a real benefit to working closely with the Apo team because they bring years of operational experience and, crucially, real resident feedback, which we combine with our own knowledge of products, procurement and design.

Rather than guessing what residents want, we can learn from how they actually live. That's a powerful proposition. Furniture needs to be robust enough to withstand everyday rental use and we're also looking closely at whether existing furniture really needs replacing, since a good-quality piece can often be given another life through new foam, upholstery or refinishing. That's better commercially and, in many cases, more sustainable. Kitchens and bathrooms details such as metro tiles and Shaker-style doors can introduce character and warmth without necessarily adding significant cost. In bathrooms, texture and materiality do a lot of the work, and large-format tiles are increasingly popular because they reduce visible grout lines and create a cleaner, calmer, more seamless finish, helping achieve that spa-like quality residents increasingly expect. ■



WE'RE ALSO LOOKING CLOSELY AT WHETHER EXISTING FURNITURE REALLY NEEDS REPLACING, SINCE A GOOD-QUALITY PIECE CAN OFTEN BE GIVEN ANOTHER LIFE.

HANNAH LODGE BAKER



3 KEY TAKEAWAYS

» A SHIFT FROM CORPORATE TO HUMAN-CENTRED DESIGN

BTR residents now compare their experience against hotels and members' clubs, driving demand for warmth and individuality.

» LEARNING FROM RESIDENT FEEDBACK

Collaboration with operator Apo brings operational insight and resident feedback, replacing guesswork with evidence of how residents actually live.

» SMART, SUSTAINABLE MATERIAL CHOICES

Refurbishing quality furniture and using large-format tiles or Shaker-style details adds character within budget in a sustainable way.

201 LYVN

201 Lyvn is a London-based interior design and FF&E procurement agency specialising in the living sector, and the sister company to property management firm Apo Group Limited. Formerly known as Hubbl, the studio rebranded as 201 Lyvn to mark a new chapter in its growth. Backed by Broadsword Investment Management Ltd and led by co-founders Alex Stewart and Hannah Lodge-Baker, 201 Lyvn crafts design-led, functional interiors that reflect the lifestyles and aspirations of its clients. Blending timeless elegance with contemporary innovation, the team transforms spaces into inspiring, personal environments, with a mission that remains unchanged: excellence in every detail.



4.0

**INTERVIEWS
WITH
EXPERTS:**

#3



JASPER SANDERS
DIRECTOR
JASPER SANDERS
+ PARTNERS

JASPER SANDERS + PARTNERS



Image credit: Gunner Gu



THERE'S A STRONGER EMPHASIS ON CONSIDERED, SIMPLIFIED SPECIFICATION THAT STILL HITS A HIGH QUALITY THRESHOLD.

JASPER SANDERS

Viability is the defining issue for BTR, and even more acutely for PBSA. Construction and labour costs have risen sharply while cost-of-living pressures have capped what rents can realistically bear, squeezing returns.

Young professionals were the primary investor target in BTR for the last five to eight years. That's now broadening towards young families and larger group living, with two- and three-bed apartments gaining ground, partly driven by families and partly by couples or groups sharing for affordability.

There's a stronger emphasis on considered, simplified specification such as joinery, bathrooms and finishes increasingly sourced from mass-manufactured components that still hit a high quality threshold, giving economies of scale. That spec quality stays fairly consistent whether it's a smaller studio or a larger family-sized unit. Lighting technology has become an increasingly important influence on the quality and experience of space. Advances in LED chip and driver technology now allow a much broader and more nuanced spectrum of colour to be reproduced, bringing artificial light closer to the qualities of natural daylight. Combined with a growing understanding of how light interacts with the nervous system, this gives designers greater opportunity not only to improve the aesthetic quality of a space, but also to support wellbeing and the way people feel within it.

An area where we continue to see a challenge is in surface specification, particularly for kitchens areas. We would like to see a worktop material that combines high sustainability, excellent heat resistance and the ability to be seamlessly finished in large formats, while remaining commercially viable. Natural stone is too expensive, solid surfaces lack sufficient heat resistance, and many alternative products require visible joints. Recycled plastics are improving, but currently do not always achieve the quality or aesthetic finish required for these applications. The laminate sector, however, has improved significantly in recent years, with manufacturers reducing environmental impact through UK-sourced recycled chipboard cores and more responsible surface finishes and manufacturing processes. Used intelligently within mass-manufactured components, these materials can provide a relatively low-carbon and commercially practical solution without compromising the quality of the finished environment. They are not a perfect answer, but they can represent a very satisfactory balance between cost, durability, sustainability and design quality, which is increasingly important in BTR and PBSA. ■



3 KEY TAKEAWAYS

» SIMPLIFIED, MASS-MANUFACTURED SPECIFICATION

Joinery, bathrooms and finishes increasingly use mass-manufactured components that hold quality thresholds while delivering economies of scale.

» WELLBEING-FOCUSED LIGHTING

LED advances now reproduce daylight-like spectrums, letting designers enhance both aesthetics and residents' wellbeing.

» KITCHEN SURFACE MATERIALS MATTER

A balance of sustainability and heat resistance is all important.

JASPER SANDERS + PARTNERS

Jasper Sanders + Partners is an award-winning Manchester-based interior design studio, founded in 2013. Led by Jasper Sanders, Rebecca Kelly and Nathalie Kenning, the studio creates distinctive environments that integrate architecture, interiors, branding and user experience. Working across the UK, its portfolio spans workplace, commercial, hospitality and residential sectors, including Build to Rent, Co-Living and PBSA. The studio's approach combines strategic thinking, innovation and purposeful design to humanise spaces, strengthen brand identities and transform buildings from the inside out.

4.0

INTERVIEWS
WITH
EXPERTS:

#4



RACHEL COLL
FOUNDING DIRECTOR
TIGGCOLL

TIGGCOLL



Image credit: TiggyColl / James Retief

Whether it's build-to-rent, student accommodation, or co-living, designing spaces today is all about understanding who actually lives in a building. These are similar animals, but the nuances matter because residents are at different life stages. I always think about how a space transitions from day to night: daytime tends to be more work-focused, moving from casual to more formal depending on the moment, while evenings shift toward relaxation or socialising.

One shift I've noticed is around differentiation. In sales-driven markets, we're used to leaning toward neutral palettes that suit most tastes. But on a recent project, the brief pushed the other way: they wanted our kitchen colour palettes to be more distinct, because operators now need their product to stand out in an increasingly competitive rental market. We offered a lighter palette and a bolder, darker one, including metal-framed wall cabinets with ribbed glass detailing. People also want a space to feel like home without committing to permanent changes. So we build in picture shelves, joinery around TV surrounds and other spots where people can display their own objects. I've also noticed a move away from fixed, built-in desks toward smaller, movable bistro-style tables, which gives residents more control over how they use their space.

Lighting is another area where layering matters. I always try to include a wall light alongside task lighting, so residents can shift the mood of a room depending on what they're doing. Similarly, changes in flooring or wall finish can help subdivide a space into zones, an eating area versus a sleeping area, without needing separate rooms. I've also seen residents repurpose amenity spaces, like meeting rooms or communal kitchens, into makeshift private offices for the day. It's rewarding to see spaces used that way.

In terms of materials, I favour softer, warm-toned finishes: engineered timber where budget allows, or bespoke patterned flooring through suppliers like Amtico, paired with a mix of built-in and loose furniture. Together, this gives each space a sense of purpose residents can build on, creating places people feel comfortable and want to spend time in. ■

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PEOPLE WANT A SPACE TO FEEL LIKE HOME WITHOUT COMMITTING TO PERMANENT CHANGES. SO WE BUILD IN PICTURE SHELVES, JOINERY AROUND TV SURROUNDS AND OTHER SPOTS WHERE PEOPLE CAN DISPLAY THEIR OWN OBJECTS.”

RACHEL COLL



3 KEY TAKEAWAYS

DESIGNING FOR HOW PEOPLE ACTUALLY LIVE

Build-to-rent, student and co-living schemes each need designs tailored to residents' distinct life stages and daily rhythms.

DIFFERENTIATION THROUGH COLOUR AND DETAIL

Operators are moving from neutral palettes to bolder, distinct kitchen finishes to stand out in competitive rental markets.

FLEXIBILITY, LAYERING AND WARMTH IN MATERIALS

Movable furniture, layered lighting and warm natural finishes let residents personalise spaces without permanent changes.

TIGGCOLL

Established in 2008 and based in a purpose-converted studio in Brook Green, West London, TiggColl design for lives well lived, creating buildings and spaces where people feel more connected, happier and more human. Guided by five principles - transformative thinking, narrative-led, honest expression, radically human and seriously playful - the practice works across all forms and scales of residential-led architecture and interiors, winning multiple awards along the way.



4.0

**INTERVIEWS
WITH
EXPERTS:**

#5



WESLEY MEYER
CREATIVE DIRECTOR
f.r.a.

f.r.a



Image credit: Simon Callaghan



SIGNAGE CAN'T JUST SHOW UP, IT HAS TO EARN ITS PLACE. IT HAS TO BE A SMALL WORK OF ART IN ITS OWN RIGHT.

WESLEY MEYER

Build to rent has been a big part of our studio's story for the last 6 years. We (more or less) got involved accidentally and since then have partnered with L&G, Grainger, Renaker and more recently Greystar and Related Argent. We've been involved in almost 110 projects, which represents about 40,000 homes across the UK and EU.

The work we do, at the intersection of brand, architecture and interiors, seems to be ever more important as the market density increases and the individual brands seek to differentiate themselves from their competitors. Beneath the creative ambition, we're a very practical studio, stitching together a number of different aspects of a project, which almost all happen independently of each other. The architecture is usually long finished before the interiors team starts, before the brand team starts. They're working together, and we're trying to find that middle ground.

A lot of our work is about brand translation: the brand may be really strong on digital, and in a brochure and advertising, but you can't just take that and copy and paste it into someone's home. We're trying to translate RGB and Pantone colours into materials that sync up with what the interior designer has within their palette. So that might mean warm oranges become copper when it hits the signage for example. Oftentimes with lighting, there's a really good opportunity to bring lighting into a space through the signage. It's a nice way to bring impact to an area, just with subtle lighting; a bit of warm lighting behind a sign can really help it pop.

There's a bit of an arms race on the kind of amenity offer in build to rent and that can be the real point of differentiation. Demand for co-working space is absolutely huge and we're starting to see operators get genuinely practical about it: actually providing separate monitors, for instance. We're also seeing far more green space, both outside and in, with planting becoming a bigger feature throughout. Pet-friendly provision is huge too. Cinemas remain divisive: some developers see them as essential, others as a waste of space, while game and golf simulators, plus content creator booths, are increasingly popular.

At f.r.a., we help people navigate and locate these amenities through signage. Signage aids organisation, helping clients avoid awkward conflicts over shared, bookable facilities. It's partly a flex, an inventory of everything on offer, celebrating and elevating the space. ■



3 KEY TAKEAWAYS

AMENITIES ARE THE NEW DIFFERENTIATOR

An "amenity arms race" continues, with operators competing to offer standout facilities that set schemes apart.

CO-WORKING GETS SERIOUS

Demand for co-working space is huge, with operators now providing practical setups.

FLEXIBLE LEISURE SPACES ARE KEY

Planting, pet-friendly provision, and extras like cinemas and content creator booths are increasingly common features.

f.r.a

f.r.a. is a multidisciplinary design team working with architects, developers and planners to enhance the built environment. Combining wayfinding, branding and placemaking, they use innovative thinking, emotional insight and technical expertise to create meaningful experiences and add value. Their hands-on approach supports projects from concept to delivery. With diverse expertise and global experience, f.r.a. collaborates from studios in Shropshire and London, while championing sustainability and positive social impact.

5.0

CASE STUDIES



HUB CORNERSTONE, LONDON

Cornerstone sits adjacent to the Barbican and will introduce a new public café on Beech Street, offering calm respite within the streetscape of the Barbican tunnel. Located in the City of London, on the edge of the Barbican Estate, the development will deliver living spaces to a uniquely central residential area, bringing new life to a site steeped in architectural heritage.

HUB's approach retains as much of the existing structure as possible, adding two storeys with barrel roofs designed to sit in keeping with the rest of the estate. This considered reuse of the building's frame will save 34% in embodied carbon, reflecting HUB's ongoing commitment to sustainable, adaptive development. The ground floor will be transformed into a café open to the wider public, extending the development's benefits beyond its residents and reconnecting the site with its neighbourhood.

Designed by AHMM Architects, Cornerstone will comprise 174 co-living homes and has been granted planning permission. The scheme will achieve BREEAM Excellent and EPC A ratings, alongside an enhanced public realm featuring additional greenery, further strengthening its connection to the surrounding streetscape.

Image credits:
Visuals courtesy of AHMM



201 LYVN

NEVAN SQUARE, LONDON

Nevan Square provides a range of stylish, high-quality studio apartments housed in a beautifully converted terraced block, located in the heart of Earls Court.

The brief was to create a collection of private rental apartments that felt contemporary and premium, while still being warm and welcoming. The footprint of the apartments was relatively small, so the design needed to be clever with layouts, furniture and use of colour to maximise the sense of space and create more opportunities for living within a compact footprint. The focus was on creating a strong identity through the material palette, furniture, lighting and detailing, while ensuring everything remained practical and durable enough for professionally managed rental accommodation. Through considered layouts, clever furniture choices, layered lighting and a carefully selected colour palette, the apartments feel functional and aspirational, with the personality and sense of style you would expect from an SW5 address.

A smaller apartment shouldn't feel like a compromised version of a larger one - good design should make every square metre work harder. Ultimately, the scheme feels sophisticated without being overly designed: homes where residents genuinely want to live, work, socialise and spend time, despite the compact footprint in the heart of central London.

5.0

CASE STUDIES
(CONT.)JASPER SANDERS
+ PARTNERSMILLINERS
YARD,
LIVERPOOL

Milliners Yard is a purpose-built, 11-storey Build to Rent (BTR) development comprising 258 apartments on London Road, at the heart of Liverpool's historic Fabric District.

Developed by Columbia Threadneedle Investments, the scheme forms part of the area's wider regeneration, reconnecting its rich industrial and textile heritage with a new generation of contemporary urban living. Jasper Sanders + Partners led the interior architecture and design of the development's shared resident spaces, including the ground-floor entrance, concierge and waiting area, residents' lounge, coffee bar, fitness suite and the public circulation spaces and corridors.

Allsop led the fit-out of the one- and two-bedroom apartments. The design concept draws directly from the Fabric District's history as a centre for millinery and textile manufacturing. This heritage informed not only the material palette and interior detailing, but also the naming and brand identity of the development.

Through a considered combination of texture, pattern, colour and crafted elements, the interiors reinterpret the district's industrial character in a contemporary way, creating distinctive, welcoming spaces that support community, wellbeing and everyday living.

Image credits: Gunner Gu



TIGGCOLL NINE ELMS, LONDON

This was Moda Living's first building in London, part of a wider redevelopment of the former Royal Mail site. Here, two blocks form one piece of a larger masterplan with MoCo & Gortt Scott as the architects on each.

TiggColl led on the amenity spaces across both. Block E, the larger of the two, opened at the end of last year and holds the most social space, while Block F has only just completed. Block E's reception wraps around the corner into a co-working space overlooking what we call the 'cricket pavilion' square of landscaping. From there the reception flows into a lounge, co-working area, games room and screening room, with a private dining space, larger lounge and small library upstairs.

TiggColl always break large amenity areas down into interconnected, human-scaled 'pocket' spaces you can weave through, rather than one overwhelming room. Block F has its own reception, co-working space and a shared gym. They designed the spaces in block E and block F to feel quite different from one another; they wanted them to have their own personality, but influenced by the landscape. These spaces feature soft, soft green tones, bringing the outside inside and reflecting the architectural intent as well.

Image credits: James Retief



5.0

CASE STUDIES (CONT.)



f.r.a

RIVERSTONE HEIGHTS, EAST LONDON

f.r.a. has to date worked across four of the projects that the developer Long Harbour has built. Their approach is deliberately de-branded: no logos, no shouting, just lifestyle.

To pull that off, they team up with designers like Linda Boronkay and, in the case of Riverstone Heights, Aaron David Clarke (ADC) Atelier. Each of the builds in the various locations are individually named and have individual styles, crafting wayfinding that feels like it belongs in the room, not bolted onto it.

To get that right, f.r.a. goes deep, sitting with the design team, learning every finish, every material choice, every detail, because the signage has to be 'just right': quiet enough to blend in, clear enough to stand out the moment you need it. Every sign is treated as a one-off, pushed to the highest level of craft.

That's meant some genuinely innovative finishes like solid brass prismatic lettering, hand-formed at 20mm thick. These spaces already have bespoke furniture, huge murals climbing the staircase, as demonstrated at Riverstone Heights in Bromley-by-Bow, so the signage can't just show up, it has to earn its place. It has to be a small work of art in its own right.

Image credits: Simon Callaghan

6.0

OUTLOOK

The Build to Rent sector is one that is marked by its resilience and ability to evolve over the past few years, rather than stagnating despite outside pressures coming from wider economic pressures, building codes and the intricacies of the planning system to name but a few sources.

The commercial interiors community must learn to keep pace with this change if it is to efficiently serve the operators, designers and specifiers who contribute to the interiors, as well as those tasked with maintaining the look and feel of the spaces and not forgetting those who call these buildings home.

Manufacturers and Design Insider subscribers in particular undoubtedly have the capability to do this when it comes to offering a breadth of lighting options to layer spaces, furniture that can be adapted for day to night use or variations of flooring that delineate particularly compact spaces.

Amenity spaces, once the jewel in the crown of many BTR schemes must now work hard to justify their existence with durability of finish yet not compromising on the contemporary styled aesthetic particularly prized by designers, as is the ability to refresh products throughout their life cycle rather than simply rip out and replace with new.

BTR sits at a fascinating intersection of sectors – taking and trading influence with PBSA, being heavily influenced by hospitality in terms of elevated style and engendering a sense of community that is common to the most successful residential schemes. And with experienced developers and interior design professionals who are passionate about creating places that people can live, thrive and socialise in, there's plenty of opportunity for experienced commercial interiors manufacturers to complete that circle of trust as time goes on! ■

Image credit: Gunner



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BTR SITS AT A FASCINATING INTERSECTION OF SECTORS – TAKING AND TRADING INFLUENCE WITH PBSA, BEING HEAVILY INFLUENCED BY HOSPITALITY IN TERMS OF ELEVATED STYLE AND ENGENDERING A SENSE OF COMMUNITY THAT IS COMMON TO THE MOST SUCCESSFUL RESIDENTIAL SCHEMES.



RESOURCES

1. **CBRE's 2026 UK Real Estate Market Outlook - January 2026**
<https://www.cbre.co.uk/insights/books/uk-real-estate-market-outlook-2026>
2. **Knight Frank's UK BTR market update Q2**
www.knightfrank.co.uk/site-assets/research/report-pdfs/build-to-rent-market-update/btr-q2-2026_final.pdf
3. **Realyse**
<https://www.realyse.com/blogs/btr-pbsa-planning-approvals-weak-market>
<https://www.realyse.com/blogs/btr-pbsa-outperform-traditional-housebuilding-planning>
4. **Savills UK Build to Rent Market Update – Q1 2026**
https://www.savills.co.uk/research_articles/229130/389260-0
5. **Tomorrow's Build-to-Rent Brands report**
<https://j2.net/insights/tomorrows-build-to-rent-brands-2026-insights-report>



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