

Office relocation

Workplace change

IT relocation

Furniture management

Storage

Technical distribution

BTMG
BUSINESS MOVES GROUP



Reimagining the office

Roundtable discussion paper
12th March 2026,
Reading



Introduction

Office attendance patterns have shifted in ways that affect not just how much space is needed, but what kind, where, and on what terms. At the same time, the tools we use to understand building occupancy have advanced considerably.

Sensor data, movement analysis, booking systems and building analytics are giving estate managers a far richer picture of how space is actually used than was possible even a few years ago. But though that information has narrowed the gap between what organisations know and what they act on in some places, it has widened it in others.

This paper is intended as a catalyst rather than a conclusion. It draws together recent data, sector case studies and observed trends across corporate real estate, facilities management, technology and the public estate.

My hope is that you will challenge it, test it, supplement it and arrive ready to explore where the evidence genuinely leads us.

Beneath the discussion, there is a quieter proposition. If transformation is now continuous rather than episodic, then the industry must respond in kind. Those who can connect data, assets, people and compliance into one coherent lifecycle will increasingly become trusted custodians of change.

Rachel Houghton,
managing director,
Business Moves Group



1. The occupancy paradox

Across the UK, office utilisation has stabilised but not recovered to pre-pandemic norms. [AWA's Hybrid Working Index](#) found that on average, midweek attendance was significantly higher, at 36% on average, compared to Mondays and Fridays, which are frequently below 30%.

The public sector has begun to act on this. [The Government Property Agency](#) has delivered savings of [£33.4m per year](#) in rent and related occupancy costs through consolidating its London estate.

Professional services firms have moved in a similar direction. Deloitte, for example, reduced its London office footprint by [approximately 33%](#).

The numbers raise a question that is harder to answer than it looks: what are organisations actually optimising for? If attendance is the measure, the estate is underperforming. If output is the measure, the picture is less clear. And if the goal is optionality, keeping space available for the days when people do come in, then a different set of trade-offs applies entirely.

Questions for the discussion

- What does your utilisation data reveal beyond headline percentages?
 - Are you designing for presence, performance or optionality?
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2. Movement, behaviour and the social life of buildings

Knowing how many people are in a building on a given day is not the same as knowing how they use it. Sensor and movement data are beginning to expose the difference between allocated space and chosen space, and the gap can be significant.

Wi-Fi tracking, for example, can track how staff navigate and move between properties, which can be used to understand occupancy trends and identify underused spaces to plan estates more effectively. If a lecture theatre is consistently half-empty or a self-study space is oversubscribed, that's valuable information for future planning.

These changes can be used to reconfigure spaces and increase employee satisfaction. But they cannot be achieved without granular behavioural data.

The implication is that buildings are communicating constantly. The question is whether the people responsible for them are listening in any systematic way.

Questions for the discussion

- Have you mapped how people move, not merely where they sit?
 - What behavioural signals are your buildings currently emitting?
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3. The booking illusion

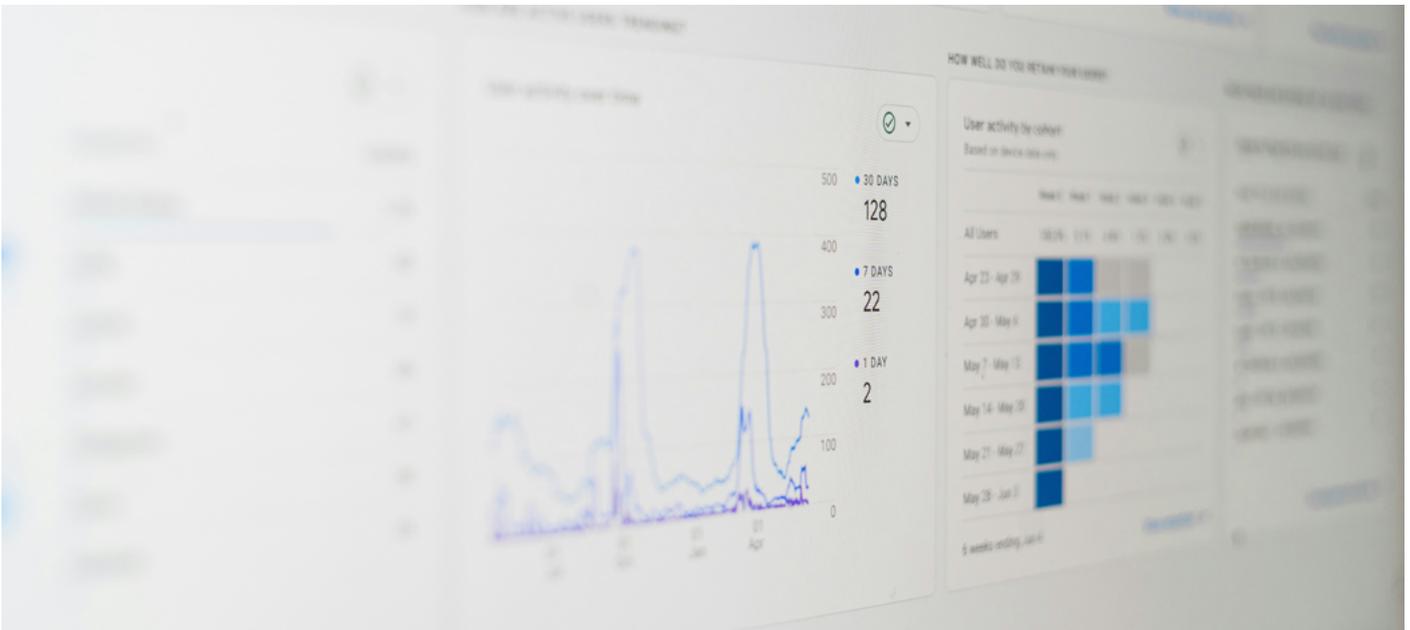
The Hybrid Occupancy Index 2025–2026 found that most workplaces continue to operate with vacancy rates of **40 to 50%**, with many using desk booking systems. However, this has created an issue of booked desks going unused.

This ghost booking problem means that space managers are working with a distorted picture – one that inflates apparent demand and makes true utilisation harder to establish. Several organisations have introduced auto-release policies and compliance dashboards to address the problem.

But the data challenge is as much cultural as it is technical. Booking behaviours reflect assumptions about availability, trust and accountability that no dashboard can resolve on its own.

Questions for the discussion

- Are booking metrics masking or illuminating reality in your organisation?
 - What cultural signals do your policies send about accountability – and how do you change behaviour without creating resentment?
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4. The digital estate

Digital investment is no longer separable from ESG performance. Buildings without credible net zero pathways are at growing risk of obsolescence, commercially and reputationally. For investors, carbon performance has become a financial issue, not merely a reporting one. [NHS Property Services](#) has implemented a range of energy efficiency measures across its estate, including smart metering, building management system upgrades and LED lighting, contributing to £23 million annual savings and a 30% carbon reduction since 2017.

The challenge for many organisations is that digital capability remains fragmented across teams, systems and contractual boundaries. Integration – of data, of accountability, of strategy – is where value is created or lost.

Questions for the discussion

- Where has digital investment delivered measurable performance gains – and where does fragmentation persist?
 - How are you connecting ESG obligations to your day-to-day estate management decisions?
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5. Space gained through digitisation

In an office, every square foot of space is associated with a cost. In cities across the UK, rent prices can range from approximately [£24 per square foot up to £182](#). Physical documents and records take up precious space, whereas digitising archives and workflows increases efficiency.

For example, [West Lindsey District Council](#) in Lincolnshire digitised its extensive microfiche archives to reduce the physical storage, reduce operational costs and make documents more remotely accessible for staff.

This is often overlooked when organisations assess their estates. Physical processes are embedded in floorplans long after the operational case for them has passed. Digitisation does not just save cost, it frees space that can be redesigned, sublet or surrendered.

There are also governance questions to resolve as custody shifts from physical to digital. Compliance, security and audit trail requirements should follow the data, not the filing cabinet.

Questions for the discussion

- Have you quantified the space occupied by paper-based or legacy processes in your estate?
 - What governance considerations have arisen as physical processes have moved to digital – and are they fully resolved?
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6. Sector context

Public sector consolidation, healthcare estate integration and private sector ratio redesigns all demonstrate that estates are increasingly required to justify themselves with data. No sector is immune to the pressure to show that space is earning its cost.

But the tools and constraints vary significantly. Regulatory requirements, lease structures, workforce composition and political accountability all shape what is possible and over what timeframe. The most valuable conversations tend to happen across sector boundaries, where a solution that is routine in one context turns out to be entirely new to another.

Questions for the discussion

- What sector-specific constraints are shaping your decisions on space – and are they genuinely fixed, or assumptions that could be tested?
- Where might cross-sector learning be most transferable to your situation?

The emerging trends

1

Utilisation data is creating difficult questions about the purpose of office space

2

The gap between allocated space and chosen space is widening

3

Booking systems are creating a false picture of demand

4

ESG performance is becoming an estate management issue, not just a reporting one

5

Digitisation can increase space efficiency

6

Cross-sector learning is underused

Conclusion

Data has run through every theme in this paper. Digitisation creates space. Space enables redesign. Redesign changes behaviour. Behaviour generates new data.

The organisations beginning to understand this are managing their estates differently by developing a fundamentally different relationship with data.

The most valuable partners in that context are those who can operate across the full lifecycle: making sense of the estate, releasing value from it, delivering transformation within it and sustaining compliance through it. That is a broader and more demanding role than the market has traditionally asked for, and it is increasingly the one that matters.

