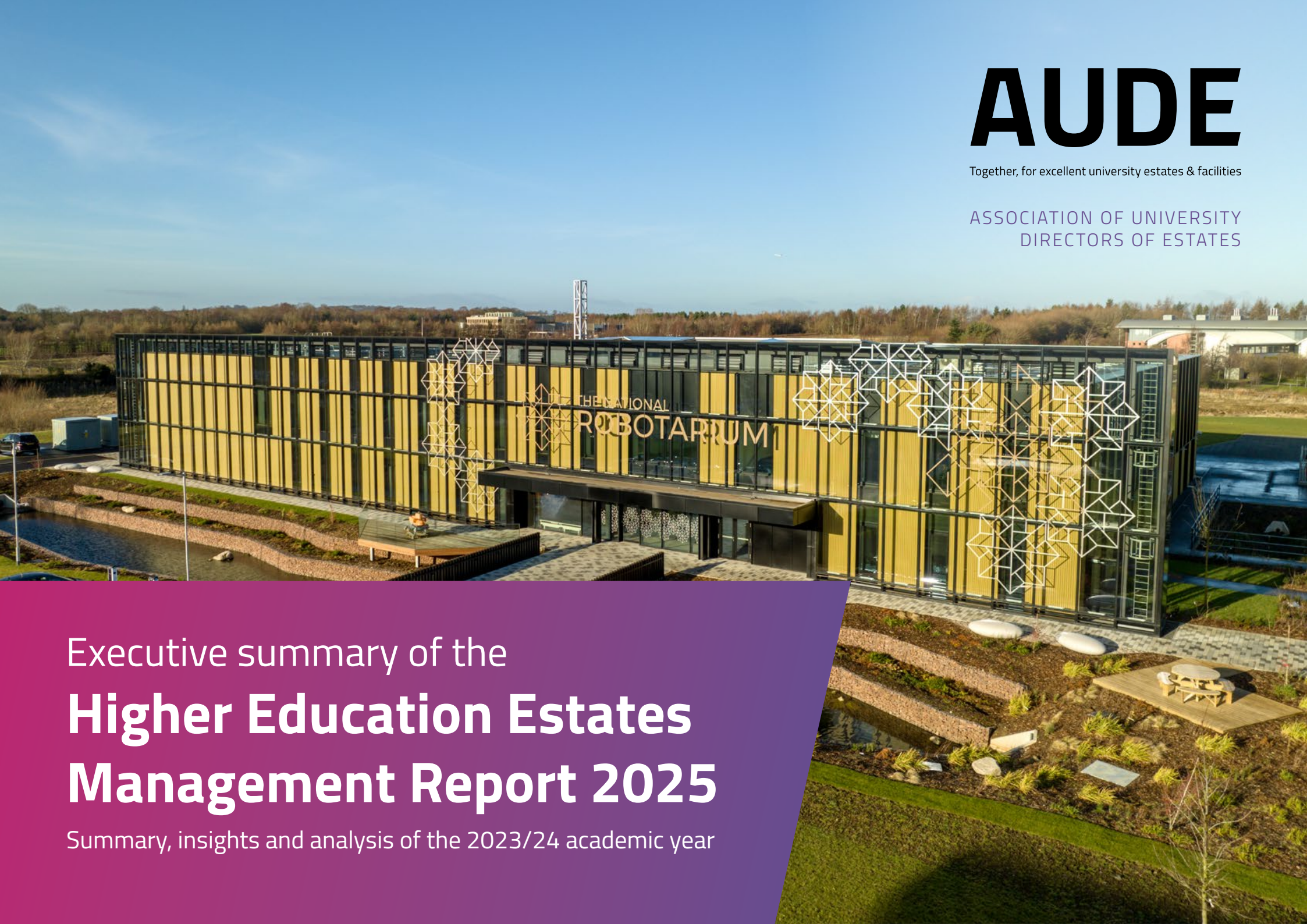


AUDE

Together, for excellent university estates & facilities

ASSOCIATION OF UNIVERSITY
DIRECTORS OF ESTATES



Executive summary of the
**Higher Education Estates
Management Report 2025**

Summary, insights and analysis of the 2023/24 academic year

In directing vice-chancellors and senior leadership teams towards key information within this year's Higher Education Estates Management Report, at a point where financial concerns are as pertinent to many universities as they have ever been, it seems necessary that the conclusions we draw from the data should be as clear as possible.

The sector almost certainly occupies too much space. Our footprint doesn't align with the income we are generating from it. Anecdotally, directors of estates and facilities hear estimates of over-provision of space ranging from 10% to 40%, always associated with ineffective use of space. The causes of such over-provision must be addressed in these times of major financial constraint. As a sector we simply can't afford the running costs associated with space we aren't using properly.





Oxford Brookes University
Workshop building on the Headington Hill site
Mark Excell Photography

Yet the sector has developed 1.09 million m² of new GIA between 2019/20 and 2023/24 – a 5% increase in just four years. The development of new buildings draws disproportionate funding, while the condition data indicates that existing estates are beginning to experience decline. The ever-enlarging sector estate requires greater revenue funding for maintenance, operations and energy, but there are opposing forces with income under pressure, international student numbers down, and movement ever closer towards a demographic peak.

At a time of dramatically increasing property costs that are outstripping inflation, and with rising energy prices a key driver of these increases, we also need to do everything we can to control our energy use. This has gains for the environment as well as financial gains for our institutions. Energy costs have more than doubled since 2022 and, although the peak of the energy crisis has passed, non-commodity charges are forecast to increase dramatically. We must continue to focus our minds on reducing energy consumption and the associated carbon emissions.

AUDE professionals have the skills to consider ways of responding to these issues. But this is not the case for a third obvious trend seen in this year's data, relating to the number of overseas postgraduates at our universities, which fell by around 6.8% in the 2023/24 academic year. We hear from our members that this trend is continuing in the current academic year.

The theme of AUDE's showcase event in September 2025 was 'Rightsizing: The only game in town' – a provocative title perhaps, but illustrative of the sheer scale of the issue of estate size and its contribution to financial viability. Let's be conservative in choosing between the anecdotal estimates of over-provision of space. If the overall higher education estate has 10% more space than it needs, the associated property costs rack up quickly, from cleaning and security to energy use and more. AUDE will never advocate for the sector to achieve the level of space used in the commercial world. Our core activities are too diverse and wide-ranging for that. But the status quo is not sustainable in many institutions.

We remind readers that demographic trends, as well as policy change around visa availability, are not in our favour in the coming years. An upwards trend in the number of UK 18-year-olds comes to an end in 2030. If overseas student numbers are down, and UK student numbers soon will be, our time for responding to the issue of too much space is short. And that means grasping the nettle about what is and isn't acceptable. This isn't a property challenge that estates and facilities teams will lead. It's a cultural challenge into which these teams will provide evidence-based expertise. Many of the buildings that could be sold or rented out need capital investment to bring them up to market standards. Disposal can be a multi-year process with costs front-loaded. But that doesn't mean we shouldn't do it.

'Rightsizing' can be taken to mean we should all be smaller. But that isn't really the point. The point is to match space provision to commercial needs. A building owned by a university and then rented to an external partner is as valid a response as disposing of the building. What space do we need to fulfil the plans we have? The right size could be larger for some institutions, although not for the sector as a whole.

The growth in private sector provision of accommodation (up by 72% since 2014) and the increasing trend for students to live in their own or their parents'/guardians' homes (37% of students now choose this option) also affect our considerations of what is the right size for our institutions.

So, what is acceptable and what isn't at a time of such financial restriction? Largely empty buildings lit and heated overnight, with no form of challenge to that? A residential energy cost per bed of £700 (compared with £290 in 2020/21) without a plan to engage with staff and students on the issue? Space per staff member reducing in 2023/24, but only because an additional 50,000 members of staff were hired across the sector, rather than through any combination of actual efficiency measures?

How confident are the readers of this report that the data they have access to guides them sufficiently? Occupancy sensor data can highlight trends in the ways our buildings are used, which can lead to direct action plans. Transparency will be needed as staff and students reasonably question the specifics of the data capture. Not all universities are in the same place on the path to digital maturity that allows detailed real-time space use data to be accessible.





Manual methods of capturing space use patterns still work, but we must commit to doing something with the information we record, either manually or digitally. Are universities benchmarking space use against comparators and acting on the information gained from this benchmarking?

For the many universities predicting real budget pressure in the coming years, there are all kinds of potential responses to the need to find savings. Academic teams will have answers around what and how to teach. HR teams will have responses that relate to all aspects of human resources. Overwhelmingly, the estates and facilities response must be around the effective use of space.

Jane Harrison-White
AUDE Executive Director

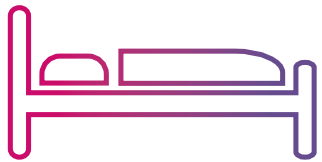
Syd Cottle
AUDE Chair and Director of Estates and Infrastructure, University of Liverpool

In this year's report we've referenced the popular 1980's computer game Tetris to give readers an idea of the sheer difficulty in managing our space effectively.

In its modern form, Tetris moves faster and adapts to the player, but it never pauses. The only way to stay in control is to anticipate what is coming next and act decisively.

That is where university estates now find themselves. The pieces are arriving more quickly, the shapes are less predictable, and the cost of delay is rising. This is no longer about perfect solutions, but about making timely, informed choices that keep the system workable.

The 2025 Estates Management Report provides the visibility needed to do that, showing what is in play and where the pressures lie. The game is already underway. The challenge now is to stay ahead of it, creating space, resilience and value before the screen fills up.



Residential income
increased from

£1,992m (22/23)

to

£2,052m (23/24)

+3%



Catering income
increased from

£350m (22/23)

to

£388m (23/24)

+10.9%



Academic capital expenditure
increased from

£2,516m (22/23)

to

£2,784m (23/24)

+10.7%



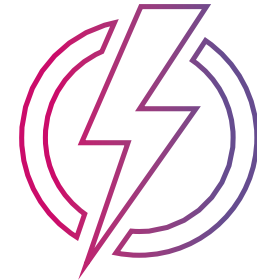
Repairs and maintenance total
expenditure increased from

£853m (22/23)

to

£919m (23/24)

+7.7%



Energy expenditure
increased from

£858m (22/23)

to

£978m (23/24)

+14%



Teaching income increased from

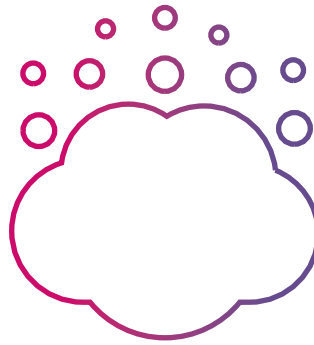
£28,118m (22/23)
to
£29,224m (23/24)

+3.9%

Research income increased from

£9,820m (22/23)
to
£9,915m (23/24)

+1.0%



Carbon emissions fell from

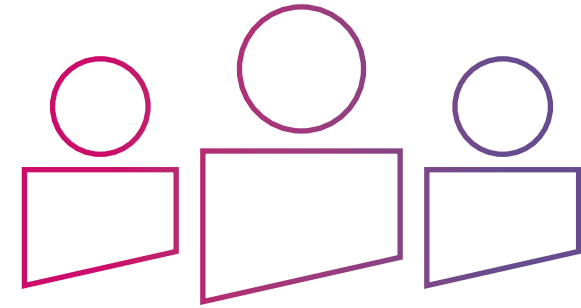
1,189 thousand tonnes
CO₂e (22/23)
to
1,152 thousand tonnes
CO₂e (23/24)

-3.1%

Carbon emissions/m² fell from

52.5 kg CO₂e/m² GIA
(22/23)
to
49.6 kg CO₂e/m² GIA
(23/24)

-5.5%



Student numbers by segment

Large Research fell from

595,071 (22/23)
to
590,956 (23/24)

-0.7%

Research Intensive fell from

313,357 (22/23)
to
301,936 (23/24)

-3.7%

Large Teaching increased from

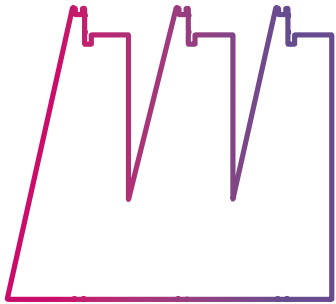
867,868 (22/23)
to
872,359 (23/24)

+0.5%

Small Teaching increased from

231,948 (22/23)
to
236,303 (23/24)

+1.9%



Estate size (GIA) increased from

22,669,107m²

to

23,225,111m²

+2.5%

(22/23)

(23/24)



Capital expenditure for the residential estate fell from

£308m (22/23)

to

£257m (23/24)

-16.6%

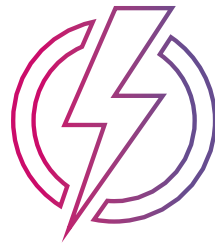


Repairs and maintenance account for

28.5%

of total property costs

£919m pa



Energy accounts for

30.3%

of total property costs

£978m pa



Cleaning accounts for

11.2%

of total property costs

£360m pa



Security accounts for

6.9%

of total property costs

£223m pa



Students living in University provided halls increased from

333,124 (22/23) **15.2%** of total student population
to
344,805 (23/24) **16.0%** of total student population

+3.5%



Students living in their own home or with parent(s)/guardian(s) increased from

758,012 (22/23) **34.6%** of total student population
to
805,235 (23/24) **37.4%** of total student population

+6.3%



Students living in private sector halls and other rented accommodation fell from

877,056 (22/23) **40.1%** of total student population
to
835,540 (23/24) **38.8%** of total student population

-4.7%

These figures all relate to the total UK student population of both UK and non-uk students including under and postgraduate students.



The Glasgow School of Art
Stow building

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