

Executive Summary of the AUDE Higher Education Estates Management Report 2018

Summary, insights and analysis from the
2016/2017 academic year. All data based
on HESA returns.

WELCOME TO THE AUDE ESTATES MANAGEMENT SUMMARY 2018.

AUDE (the Association of University Directors of Estates) publishes its annual Estates Management Report (EMR) as a way to help the sector make strategic decisions in estates management.

Capital expenditure in the UK's universities has exceeded £3bn for the three consecutive years since 2015/16: this report provides the information background for important, high-value and long-term decision-making.

We are working at a time of real uncertainty.

The information that sits behind the analysis in the report offers hard facts and accurate data to guide us. This perception of uncertainty can be characterised in a number of ways. We can't yet foresee the full impact of Brexit on HE – in many areas from the cost of imported materials and components, to student and staff recruitment, to research income. The implications for universities of Grenfell and its aftermath will continue to play out for years to come; while the collapse of Carillion has led many across the sector to question both new and existing outsourced contracts.

“the information background to help the sector make strategic decisions in estates management”



UNIVERSITY INCOME
HAS GROWN BY 3% TO

£33.4bn



CARBON EMISSIONS FALLING,
NOW BETWEEN

**55 and 95
kgCO2e/m2**



HOME UNDERGRADUATE
STUDENTS GROWN BY
2.6% TO OVER

1.2MILLION



STUDENT NUMBERS NOW NEARLY

1.7MILLION



REPAIRS AND MAINTENANCE
ACCOUNT FOR

35%

OF TOTAL PROPERTY COSTS



ENERGY

20%



CLEANING COSTS

13%



SECURITY

10%


AUDE's Estates Management Report 2018 (EMR) is a tool to guide Estates Directors, their teams, and their university's senior management teams in making difficult long-term decisions. A benchmarking report, EMR allows institutions to compare themselves against similar universities – by size, and by the different proportion of income generated by teaching or research.

"hard facts and accurate data to guide us at a time of real uncertainty"

The scale and variety of AUDE member institutions is huge, and of course there are significant variations between universities in the size and nature of the estates challenges that they face. But we are confident today that the overall standard of the university estate is higher than it has ever been, and we recognise the huge amount of work and consistent commitment of our members in achieving this.

Amongst key benefits that AUDE offers its member institutions, is the dataset in the EMR, which as an example includes AUDE KPIs, such as income per sqm (which can be thought of as an indicator of the overall efficiency with which the estate is used). Using AUDE's KPIs of Efficiency, Quality, Value and Sustainability, our universities focus on the

"the overall standard of the university estate is higher than it has ever been"



standard of their estates. The analysis in the report shows that universities are continuing to improve against these KPIs. The report highlights good, responsible management of university estates; indeed the overall picture has never been better.

But that picture is complex and repays detailed study – perhaps complexity is inevitable across more than 150 institutions of widely varying scale. There are indicators and counter-indicators aplenty. Overall teaching income has grown over the year of the report, by 4.2% (to £20.8bn), while overall research income has grown by 0.6% (to £7.9bn). Demographics show us that UK 19 year olds will soon dip to an historic low. Our best new buildings are often more complex than those they replace and can be used intensively – meaning the operating costs associated with them may be higher, though they have been built with impeccable environmental credentials.

“AUDE creates an environment in which estates professionals can ponder complexity and develop the right solutions”

It is the task of the report and of AUDE as a membership organisation, to create an environment in which estates professionals can ponder this complexity and develop the strategies and solutions that are right in the individual context of each university.

Behind the graphs and the statistics, the report points to some of the underlying themes that are at the forefront of every HEI's strategic thinking. In the light of the EMR our members are considering a range of themes. These include: student experience, from our learning spaces to our residential accommodation through student wellbeing provision; quality vs cost within a framework of compliance – the daily juggling act for AUDE members at a time of continuing downward pressure on costs; the role of the estate as a physical environment - in staff attraction and retention at a time of increasing international competition.

AUDE and its members, like all estate professionals, are keenly watching developments following the terrible fire at Grenfell in June 2017. The Hackitt report which was published in May 2018 found that poor oversight in the construction industry led to a 'race to the bottom' but fell short of recommending an outright prohibition of cladding materials similar to those which contributed to the rapid spread of fire. A groundswell of opinion appears to be pointing towards a more proscriptive ban on flammable cladding materials, but government direction is still awaited.



GROWTH IN STUDENT NUMBERS GREATEST AT
RESEARCH INSTITUTIONS AT 4%,
TEACHING INSTITUTIONS AT 2% GROWTH.



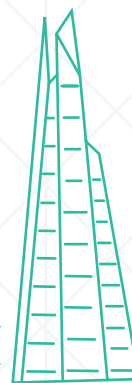
ESTATES GROWN BY

209,000M²

TO OVER

22,000,000M²

OR EQUIVALENT TO **52x**



The AUDE Estates Management Report 2018 is an essential tool within the full range of support that AUDE offers to its members. For instance the AUDE Annual Conference and Big Conversation events are unmissable parts of the HE estates management calendar, while AUDE's Sustainability Leadership Scorecard helps senior leadership teams understand the multi-faceted challenge of delivering against the sustainability agenda in their university.

For more information on how AUDE supports estates and facilities management directors and teams across higher education please visit our website at www.aude.ac.uk

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AUDE members can download the full
Estates Management Report 2018 at:
aude.ac.uk/emr

Not a member?

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