



international  
unit

# THE UK'S COMPETITIVE ADVANTAGE

MARCH 2016

# THE UK'S COMPETITIVE ADVANTAGE

The UK HE International Unit's series of three UK Competitive Advantage reports on international students examine the UK's comparative position with respect to international student recruitment and the international student experience at undergraduate (UG), postgraduate taught (PGT), and postgraduate research (PGR) levels. The findings are based on international student experience data derived from i-graduate's International Student Barometer (ISB) survey, including more than 800 universities worldwide and more than 100 in the UK. It is supported by statistics on international student recruitment and enrolment in the UK and major comparator countries, as well as a high-level analysis of key competitors' government policies on recruitment, support and post-study employment. In total, the reports draw on feedback from **365,754 international students** studying outside their home country. This dataset is without precedent in scale and detail, making this the most significant and comprehensive study of the international student experience to date.

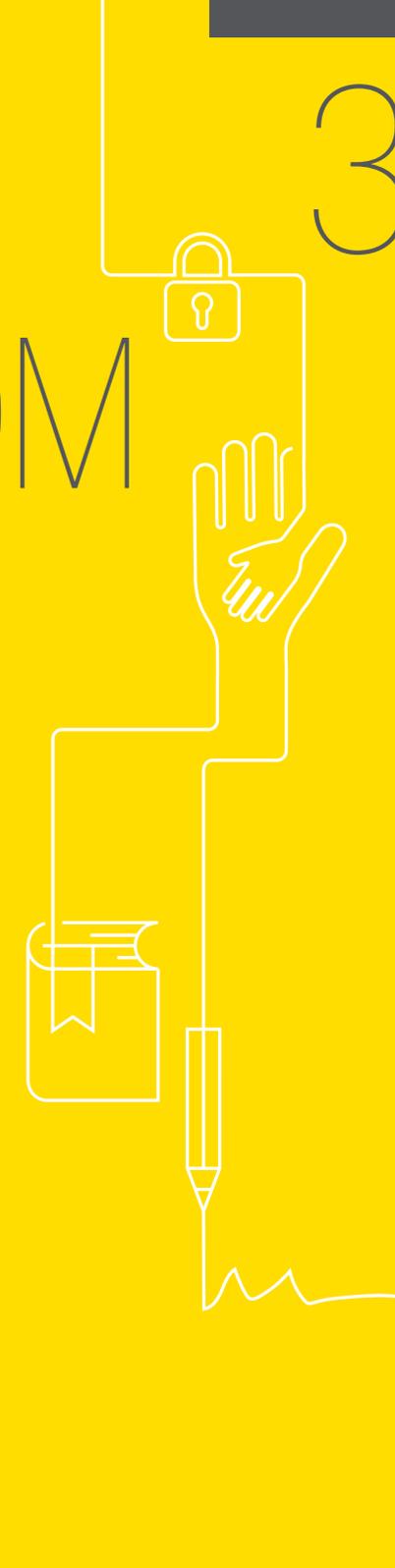
# SUMMARY FINDINGS FROM THE REPORTS

**The UK is the most recommended major English-speaking higher education destination in the world by international students. This is true at every level of study.**

Is it number one for student satisfaction at Undergraduate and postgraduate research level, and satisfaction has improved in every dimension of the learning experience at undergraduate, taught postgraduate and research postgraduate level.

85% of international undergraduates would recommend or actively recommend their UK study experience, for PGT 86% of students would recommend the UK which is up by 4% since 2007/8, and for PGR 85% of students in the UK recommend their experience, up by 5%.

The UK has the highest satisfaction ratings amongst our competitors for all the main dimensions of the UG student experience and the highest satisfaction ratings for the research student experience for the majority of all measures.



International student satisfaction with UK higher education is very high:



**Undergraduates**



**Postgraduate Taught**



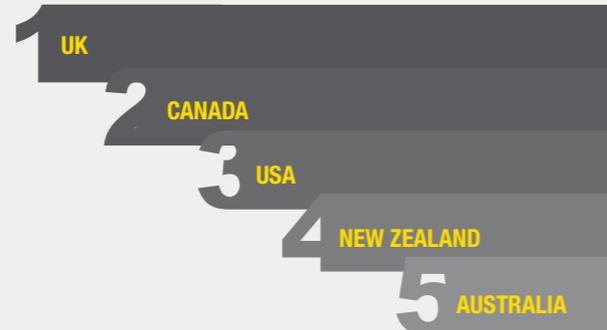
**Postgraduate Research**

For all three levels of education, a higher proportion of international students would recommend the UK than any of its major English-speaking rival destinations.

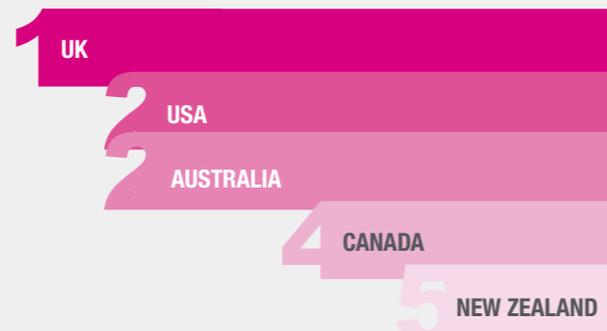
**Undergraduate**



**Postgraduate Taught**

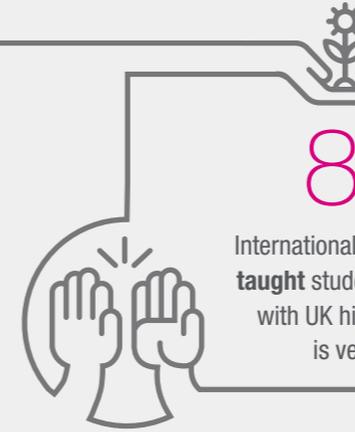


**Postgraduate Research**



**30%**

30% of all students studying in **postgraduate taught** programmes in the UK in 2013–14 were international



**89%**

International **postgraduate taught** student satisfaction with UK higher education is very high at 89%

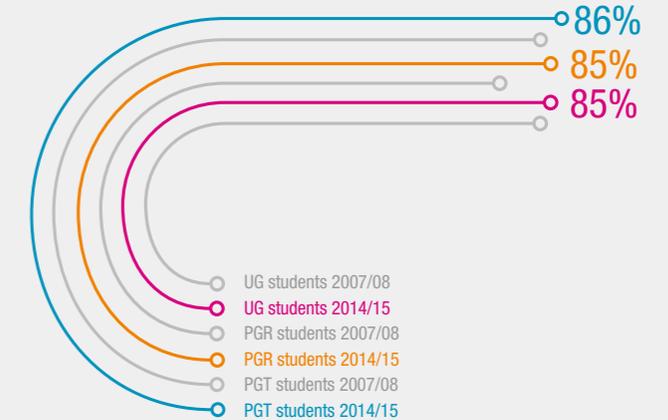
**86%**

of international **postgraduate taught** students would recommend or actively recommend their UK study experience.



Compared against its primary rivals for **postgraduate research**, the UK has the highest satisfaction ratings for the research student experience for the majority of all measures, rated #1 for 47 of 85 indicators, including course content, expert supervisors and research.

85% of international **undergraduates** would recommend or actively recommend their UK study experience, for **PGT** 86% of students would recommend the UK which is up by 4% since 2007/8, and for **PGR** 85% of students in the UK recommend their experience, up by 5%.



**Overall undergraduate rankings (2014)**



**Recommendation**

1. UK
2. US
3. CANADA
4. AUSTRALIA
5. NZ



**Overall satisfaction**

1. UK
2. US
3. CANADA
4. AUSTRALIA
5. NZ



**Arrival**

1. UK
2. AUSTRALIA
3. US
4. CANADA
5. NZ



**Learning overall**

1. UK
2. US
3. CANADA
4. AUSTRALIA
5. NZ



**Living overall**

1. UK
2. AUSTRALIA
3. NZ
4. US
5. CANADA

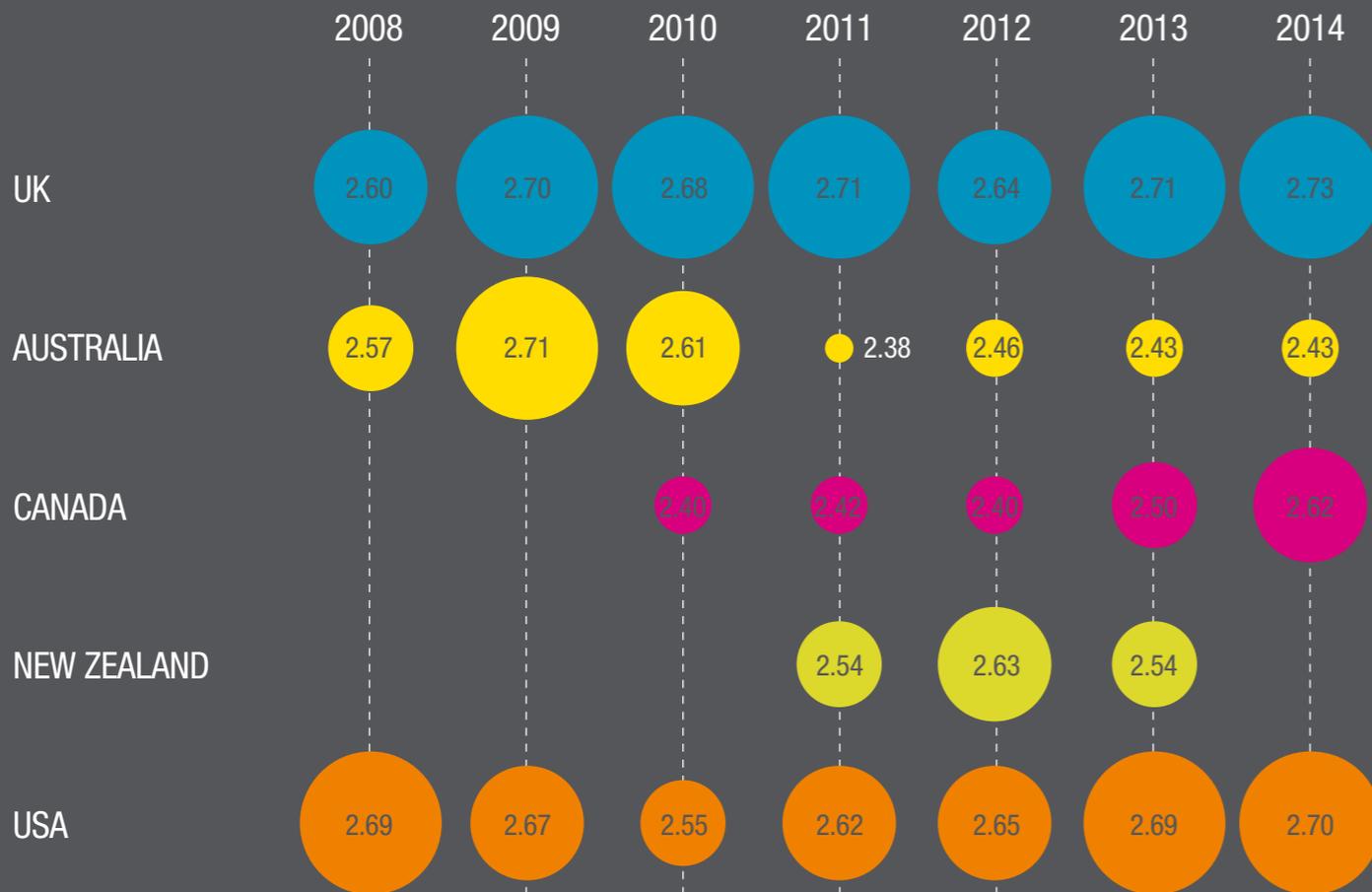


**Support overall**

1. UK
2. US
3. NZ
4. AUSTRALIA
5. CANADA

# COST OF LIVING

Satisfaction with the cost of living in the UK for all levels of students has increased over the last seven years and is highest in 2014 for both UG and PGR. For international UG students in the UK, satisfaction is highest of any of the major English language destinations. Notably, Australia suffered a significant fall in satisfaction since 2009.



# INTERNATIONAL UNDERGRADUATE STUDENTS



International undergraduate students rate the UK number one for student satisfaction, ahead of the USA, Canada, Australia, Germany and New Zealand.



International undergraduate student satisfaction with UK higher education is very high at 91% and satisfaction has increased in every area of the learning experience.



85% of international undergraduates who study here would recommend the UK experience to others; the highest recommendation rate of all of the major English-speaking destinations.

**In undergraduate education the UK HE sector excels against its competitors in teaching and learning, with the highest ratings for 15 of 23 measures of the teaching and learning experience.**

To continue to attract the best talent from across the world, in greater numbers, the sector must jointly and severally capitalise on its evident strengths in undergraduate provision, while keeping an eye on innovations and improvements elsewhere. The UK also has higher satisfaction with the cost of living than our main rivals, and yet the UK's actual market share of international undergraduates over this period has stagnated, while universities in the US and Canada have seen significant growth in numbers and market share. More students consider several destinations when choosing where to study and there is no doubt that the sector is being negatively impacted by current visa policies.

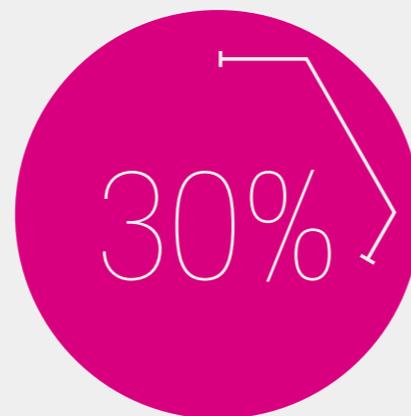
# INTERNATIONAL TAUGHT POSTGRADUATE STUDENTS



International postgraduate taught student satisfaction with UK higher education is very high at 89%.



86% of international postgraduate taught students would recommend or actively recommend their UK study experience.



International PGT students comprised approximately 30% of all students studying in PGT UK programmes in 2013–14.

The responses of international PGT students studying in the UK clearly indicate the top decision-making factors are institutional reputation, the specific course of study and the quality of research. The UK's primary competitive advantage rests on the quality of its institutions and what they offer.

PGT students provide a vital foundation to sustain the diversity of PGT programmes offered by UK universities, especially for Science, Technology, Engineering and Maths (STEM).

# INTERNATIONAL TAUGHT POSTGRADUATE STUDENTS

With typically comparatively shorter programmes of study, the UK should have an obvious competitive advantage in terms of the cost of postgraduate study, less time away from the labour market, higher student retention and high completion rates. With most study completed in a single academic year, while the US leads in terms of total PGT enrolments we estimate that the UK has a higher number of new commencements each year, making it the world's largest annual recruiter of PGT students as well as the world's largest number of PGT completers.

The areas of greatest concern, where satisfaction levels have fallen markedly since 2008 are around employment and visas, earning money and financial support, are beyond the immediate capability of universities to resolve.

To address emerging issues and competitive gaps in the international PGT market, this report calls for policy attention to be directed to access to employment during study as well as current visa arrangements. There has been some liberalising in the opportunities for graduates to obtain work visas post-study in most competitor nations, in order to make PGT study more attractive. Inevitably, this growing differential in post-study opportunities will put UK institutions at a competitive disadvantage in attempting to recruit the best of the international student pool.

# INTERNATIONAL POSTGRADUATE RESEARCH STUDENTS



Compared against its primary rivals for postgraduate research, the UK has the highest satisfaction ratings for the research student experience for the majority of all measures, rated #1 for 47 of 85 indicators, including course content, expert supervisors and research.



85% of research students in the UK recommend their experience. Recommendation rates have increased by five percentage points since 2008 and are higher than those achieved in the USA, Canada, Australia and New Zealand.



In 2014-15 90% of international PGR students were satisfied with their education in the UK. Since 2008 UK universities have driven up research student satisfaction across 81 of 85 measures of the PGR student experience.

The UK has the highest satisfaction ratings for research student experience across the majority of measures, but competition from key nations is getting stronger: the UK's rivals have also recorded sharp improvements in recruitment and are adopting ambitious strategies to drive future growth.

Pressure points for the UK include visa processing, post-study work opportunities and the introduction of new graduate schemes: The report's findings illustrate the success achieved by competitors who have adjusted their related policy settings to boost international student recruitment.

The importance of international PGR students extends far beyond their economic value: They are fundamental to the national research pipeline, they help to drive economic innovation and social improvement, and they offer universities a global network of the most highly-qualified influential alumni in research, university leadership and beyond.

## A BETTER FUTURE

National UK-level data shows the average across all participating institutions. Each university has highs and lows. Most work hard to identify weaknesses and make improvements – evidenced by increased levels of student satisfaction across all measures of the learning experience – across what is evidently world-class provision. High average scores should not be taken to signal future indifference, as most UK universities are responsive. More universities are sharing good practice, but all countries compared could improve international students' satisfaction with making friends from their host country.

Areas of lower satisfaction have seen the most rapid improvements, such as careers advice and learning support, or are ahead of rivals, such as making host country friends. Notable areas showing lower levels of satisfaction relate to financial indicators (earning money is down seven percentage points to 68%) and cost of accommodation has seen a marginal downturn but scores better than rivals.

It is hoped that these reports contribute to a better understanding of the current international student landscape and are intended to drive sustained growth for this critical component of the UK's higher education system and place in the world.



## The UK HE International Unit

Woburn House  
20 Tavistock Square  
London WC1H 9HQ

+44(0)20 7419 5421

 [info@international.ac.uk](mailto:info@international.ac.uk)

 [www.international.ac.uk](http://www.international.ac.uk)

 [@internationalUt](https://twitter.com/internationalUt)

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