Get informed.  
Seize challenges.  
Engage with the future.

The shape of things to come:  
Higher education global trends and  
Emerging opportunities to 2020
Research Topic

Forecast the landscape for the global tertiary education sector in 2020 by studying demographic and economic drivers of demand.
60% of inbound students go to...

- United States
- United Kingdom
- Australia
- France
- Germany
- Russia
- Japan
- Canada

Other regional destinations...

- South Africa
- Singapore
- Malaysia
- China
- South Korea
International research collaborations

1. Switzerland
2. Belgium
3. Sweden
4. Netherlands
5. France
6. Germany
7. Canada
8. UK
9. Australia
10. Italy
Demographic drivers

Positive correlation between global university aged population and tertiary enrolments

Outlook for 18-22 year olds is stable

Global growth in tertiary enrolments will slow from 5% per annum to about 1.4% per annum

There is a stable propensity to study abroad
**Tertiary age (18-22) population growth (2011-2020, 000s)**

Source: UN Population Division, Oxford Economics

© 2011 British Council. All rights reserved. This document may not be amended, copied or distributed without express written permission

---

**Economic drivers: GDP per capita (PPP)**

$$y = 0.1693 \ln(x) - 1.1472$$

$$R^2 = 0.5378$$

$$20\%$$

$$40\%$$

$$60\%$$

$$80\%$$

$$100\%$$

Source: Haver Analytics, Oxford Economics, UNESCO

© 2011 British Council. All rights reserved. This document may not be amended, copied or distributed without express written permission
The shape of higher education in 2020: Tertiary enrolment growth

Source: Oxford Economics
The shape of higher education in 2020:
Highest growth in tertiary enrolments

2002-2010
1. China
2. India
3. United States
4. Brazil
5. Iran

2011-2020
1. India
2. China
3. Brazil
4. Indonesia
5. Nigeria

The shape of higher education in 2020:
Outward student mobility

Outbound mobile students by origin market growth (2011-2020, 000s)

Source: Oxford Economics
The shape of higher education in 2020: Student mobility growth market comparison

2002-2009

2010-2020

The shape of higher education in 2020: Inbound student mobility

Inbound mobile students by destination market growth (2011-20,000s)

Source: Oxford Economics

* includes shortlisted country origin markets only

© 2011 British Council. All rights reserved. This document may not be amended, copied or distributed without express written permission
The shape of higher education in 2020: Transnational education

- Continued shift to East Asia
- South-south transfer
- Niche programmes

The shape of higher education in 2020: Research collaboration

- Correlation between international collaboration and number of citations
- US and China will make up majority of collaborations
- Collaborations will continue to be bottom-up
The shape of higher education in 2020:
Summary of findings

• Opportunities continuing to move east
• Traditional destinations will face competition from countries in the Middle East and East Asia
• Development in South Asia