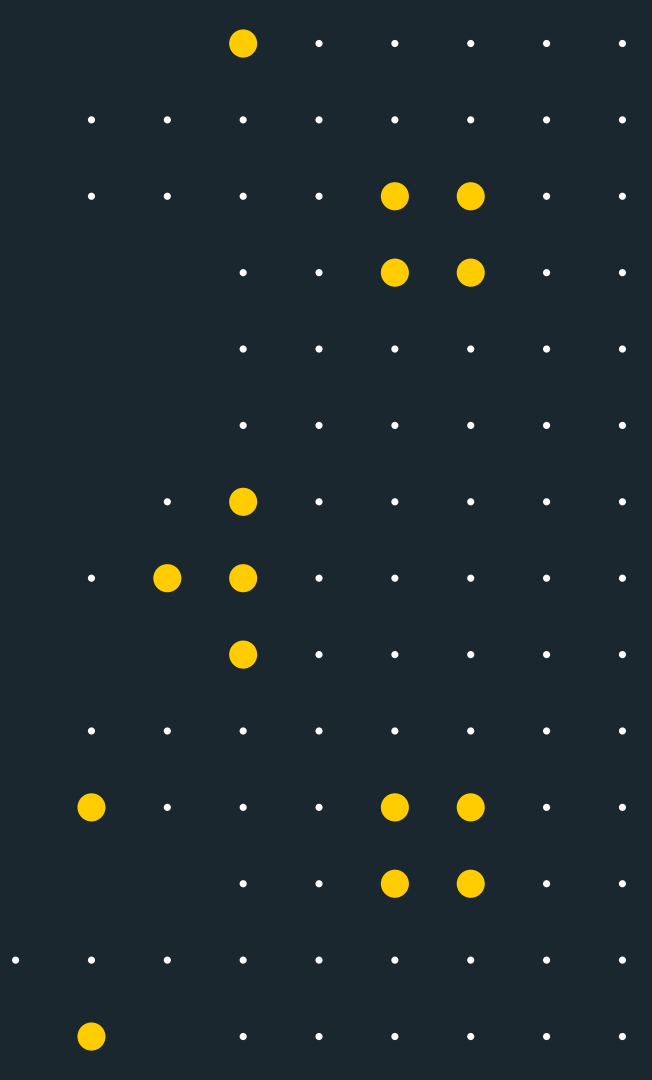




The Latin America Higher Education Landscape

2026 to 2030



Education in
2030

Institutional
performance

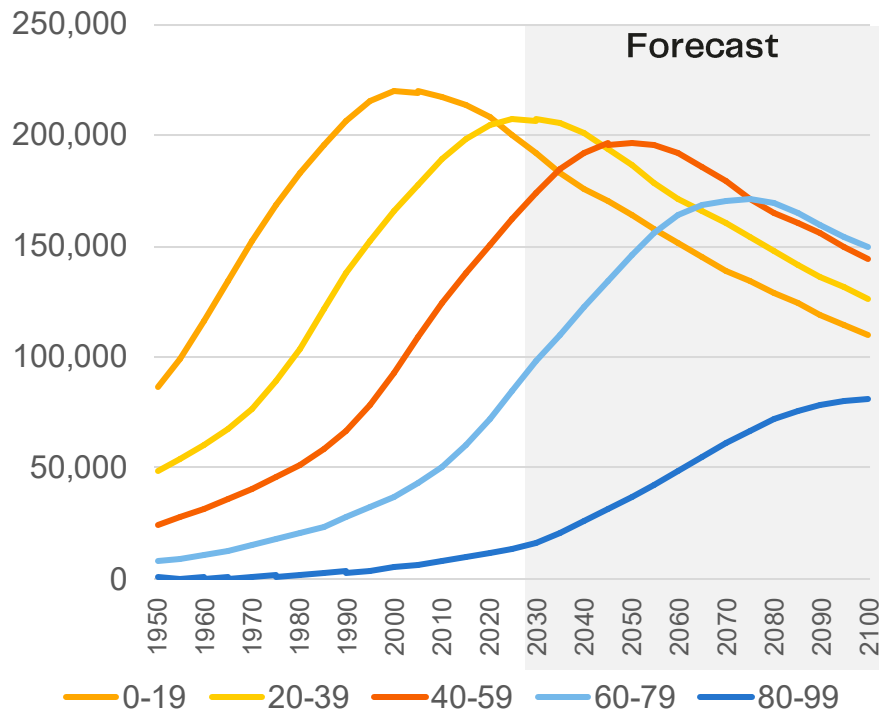
Student
recruitment

Skills and
workforce

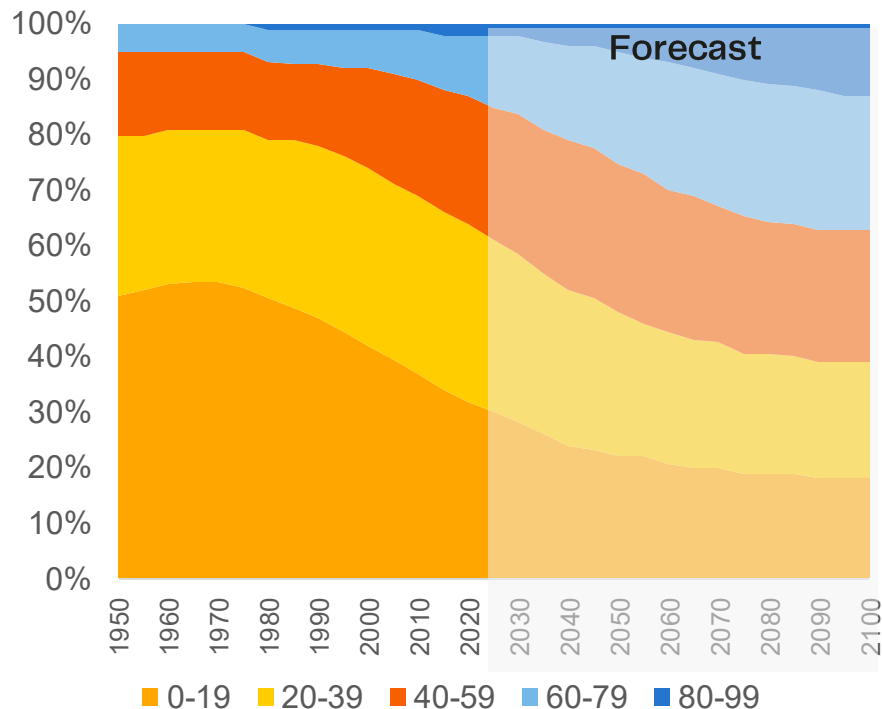
Innovation and
technology

LATAM's young person population will decline sharply

Population by age group (000's)

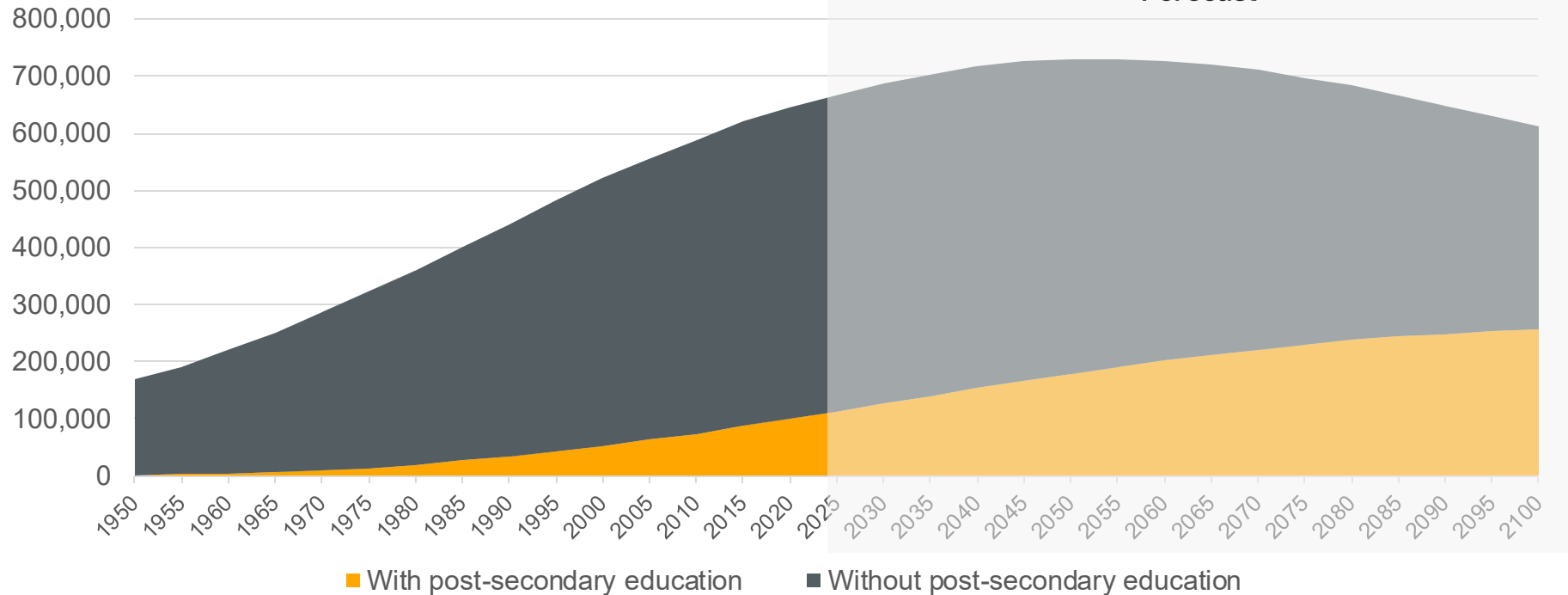


Share of population by age group (%)



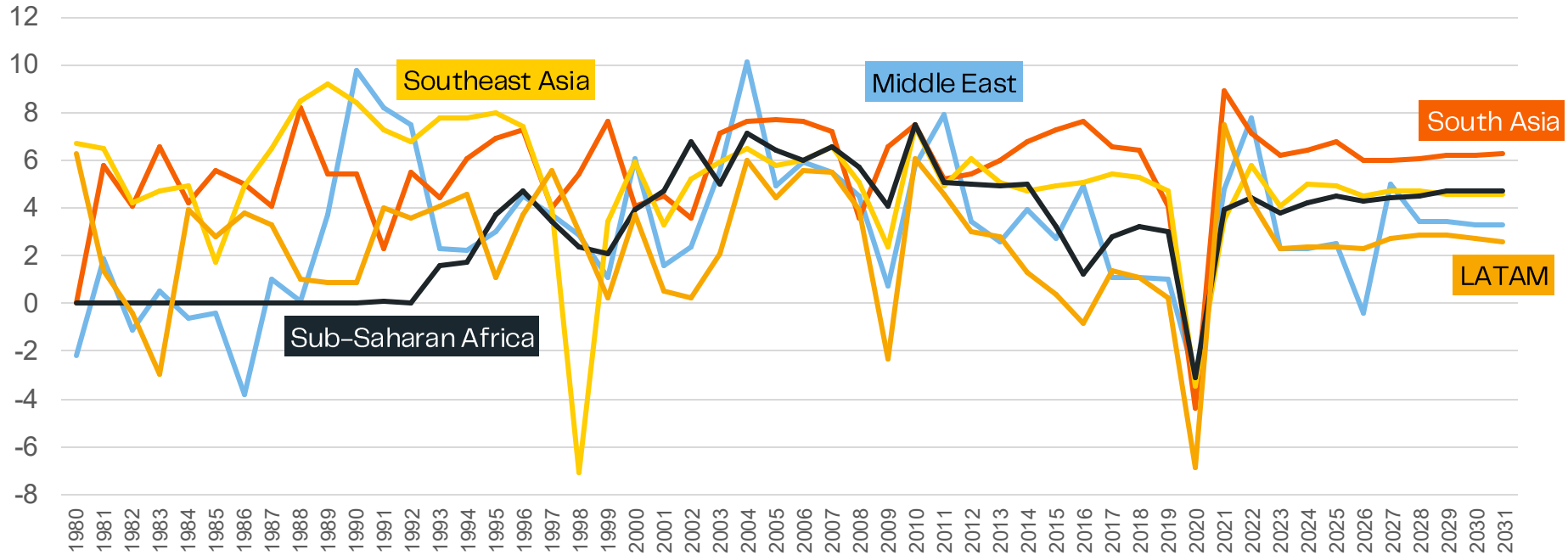
Despite this, demand for a higher education will increase

Educational attainment

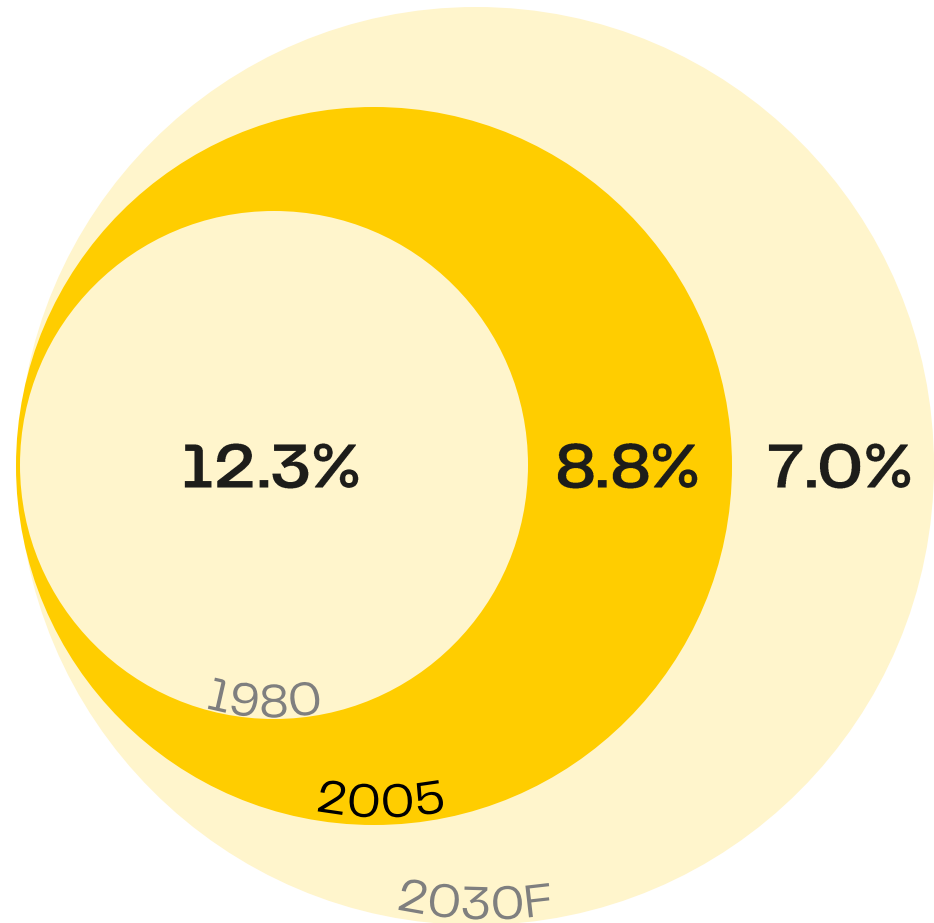


Harnessing that talent will be essential to drive growth

GDP growth: LATAM



And to reverse
LATAM's
declining
global GDP
share



8 global shifts underpin our outlook for 2030 and beyond

**Power
shifts**

**Resource
shifts**

**Demographic
shifts**

**Technology
shifts**

**Economic
shifts**

**Energy
shifts**

**Urban
shifts**

**Behavioural
shifts**

Education in
2030

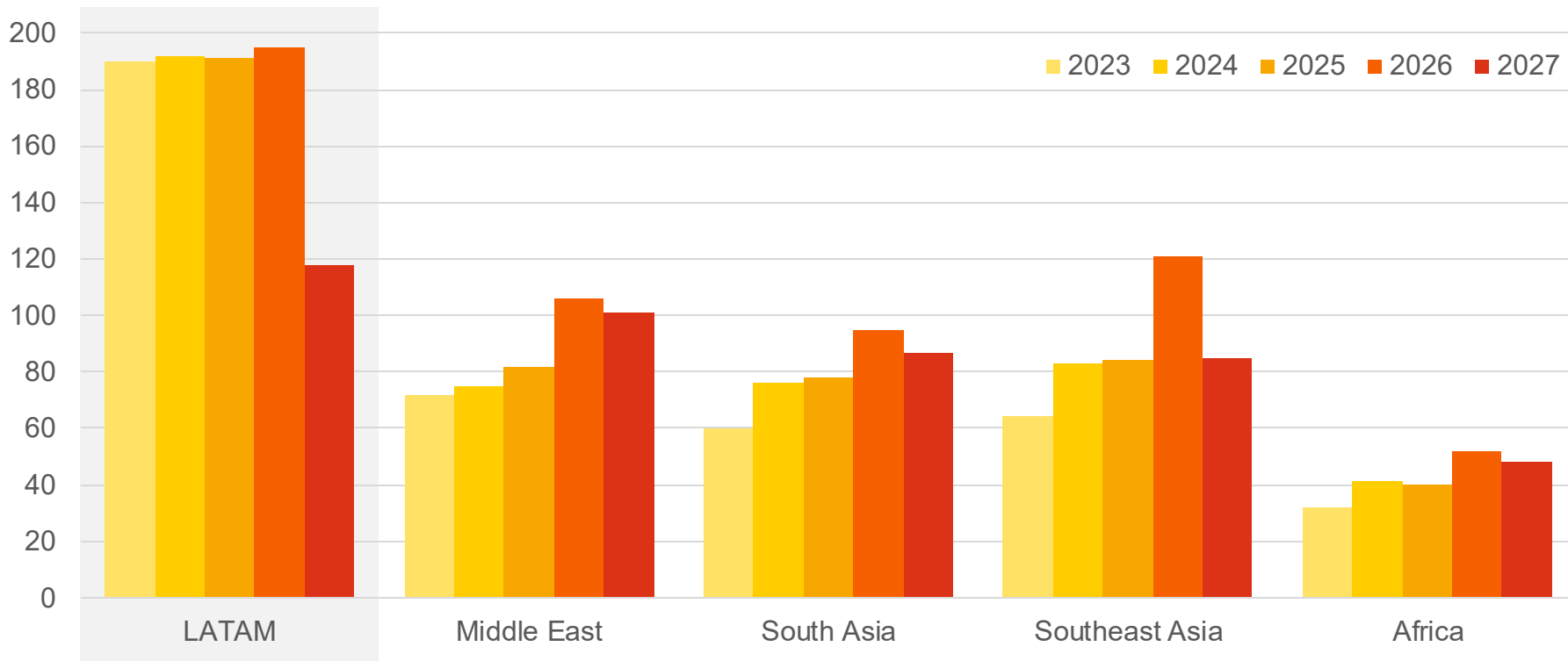
**Institutional
performance**

Student
recruitment

Skills and
workforce

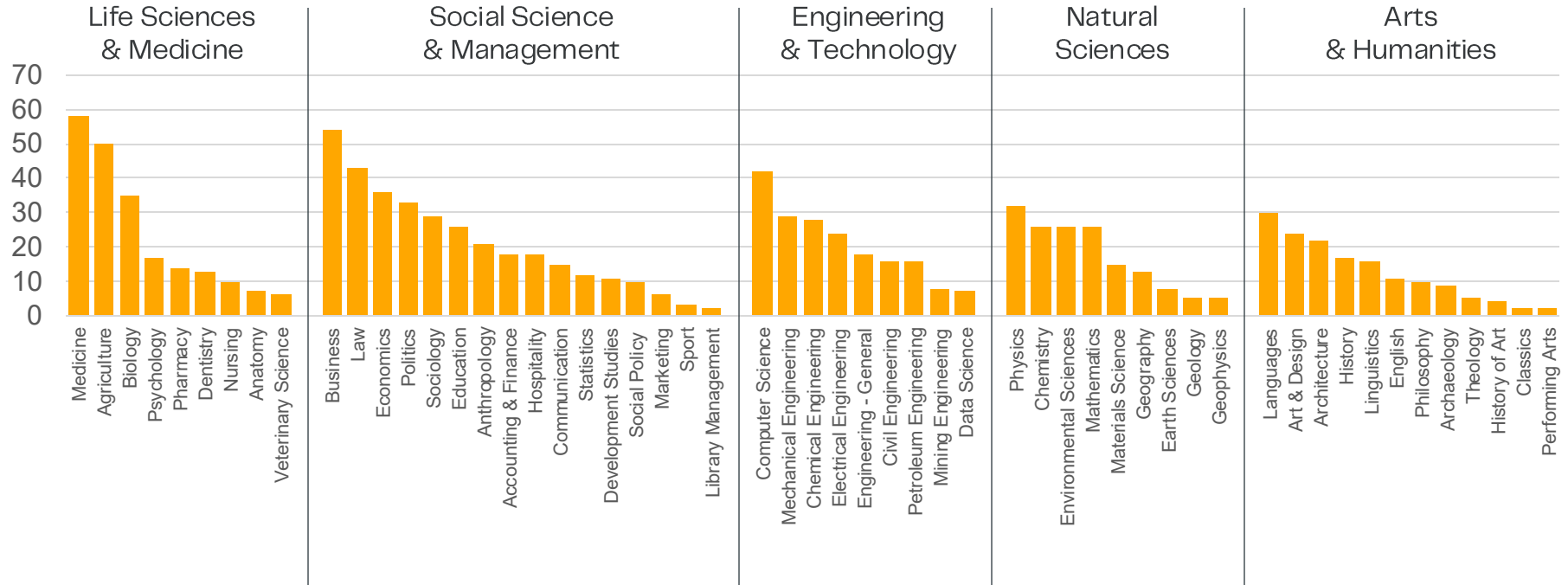
Innovation and
technology

LATAM saw a fall in the number of ranked universities in the latest iteration of the QS World University Rankings



LATAM is well represented across Life and Social Sciences

Number of ranked LATAM institutions by subject



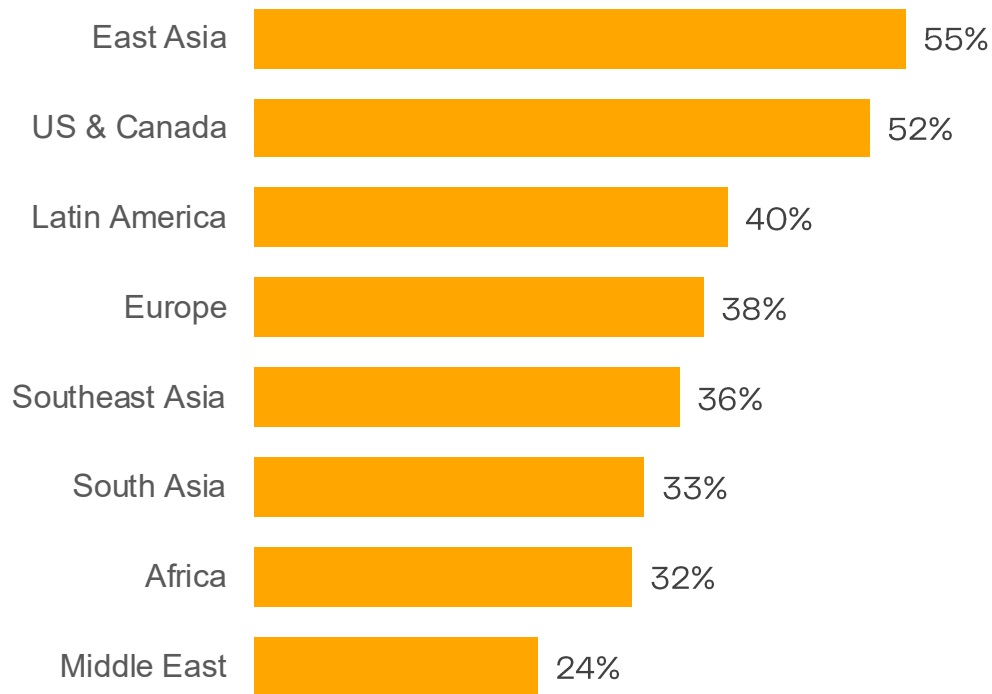
Institutional reputation is a key driver of student decision-making

Subject reputation is an important factor to over a third of all students looking to study in LATAM.

However, institutional reputation is significantly more important to candidates from North and Latin America and from East Asia.

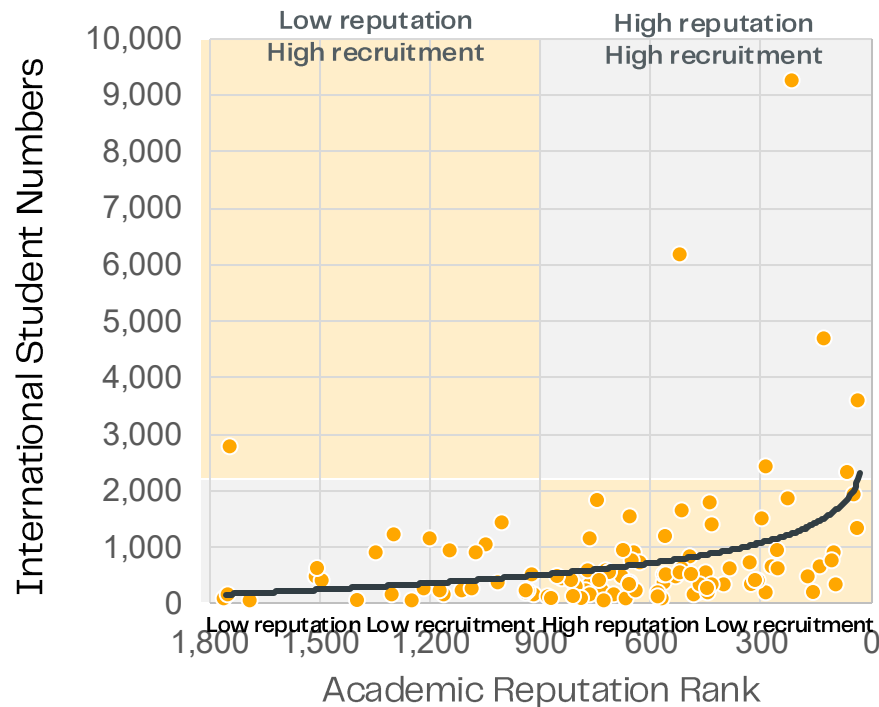
These source regions will be key to driving international student flows in the region, making it essential for institutions to preserve and enhance their reputation amongst key stakeholders.

Importance of subject reputation when choosing a university

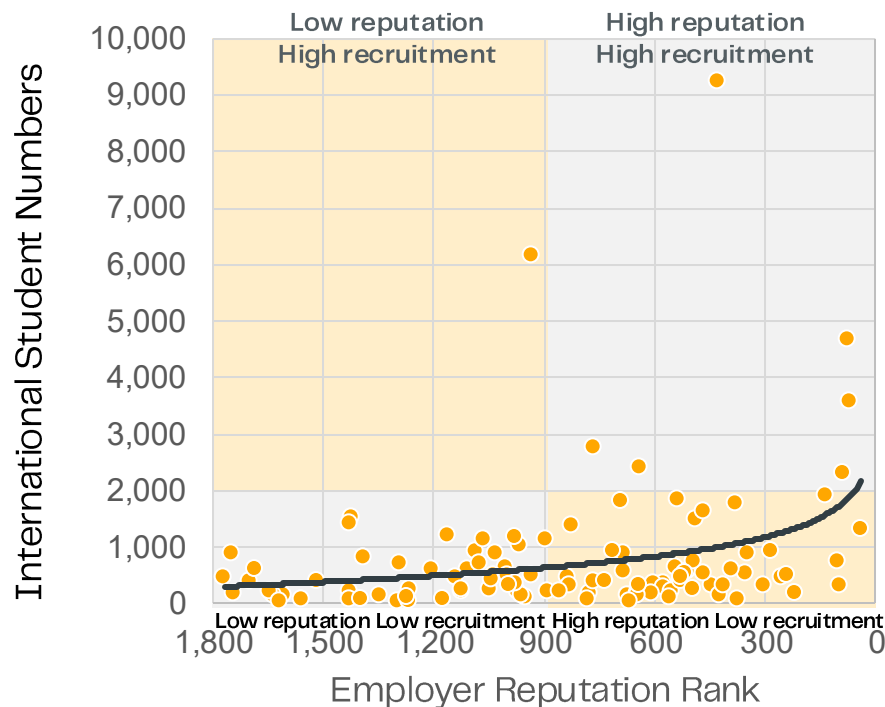


Reputation is strongly tied to international recruitment

QS Academic Reputation



QS Employer Reputation



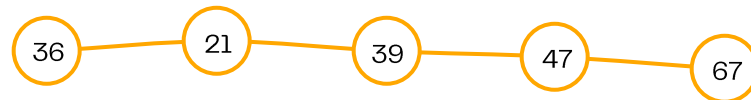
Which is why the longer-term decline in the reputation of LATAM institutions should be a priority for our leaders

QS Academic Reputation (average rank)



The average Academic Reputation rank has declined by **57** places

QS Employer Reputation (average rank)



The average Employer Reputation rank has declined by **298** places

—○— Overall average —○— Top 5 average

—○— Overall average —○— Top 5 average

Education in
2030

Institutional
performance

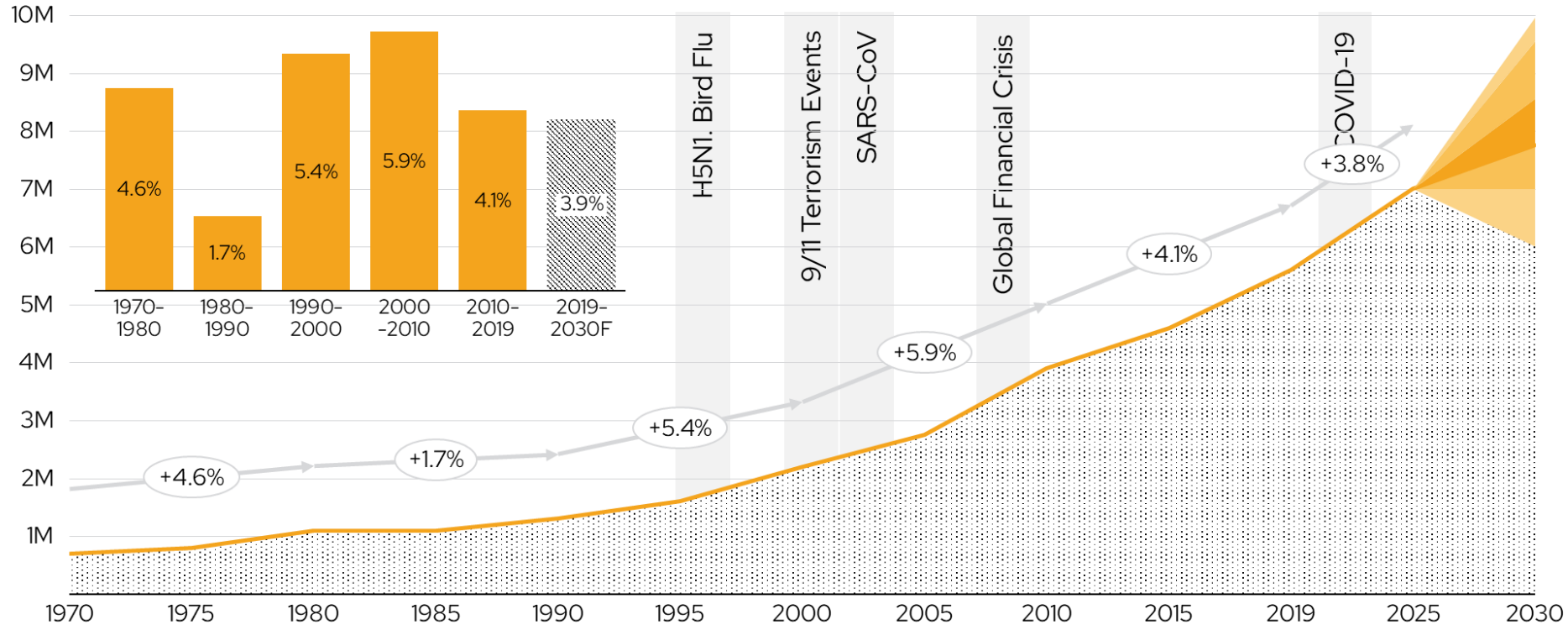
**Student
recruitment**

Skills and
workforce

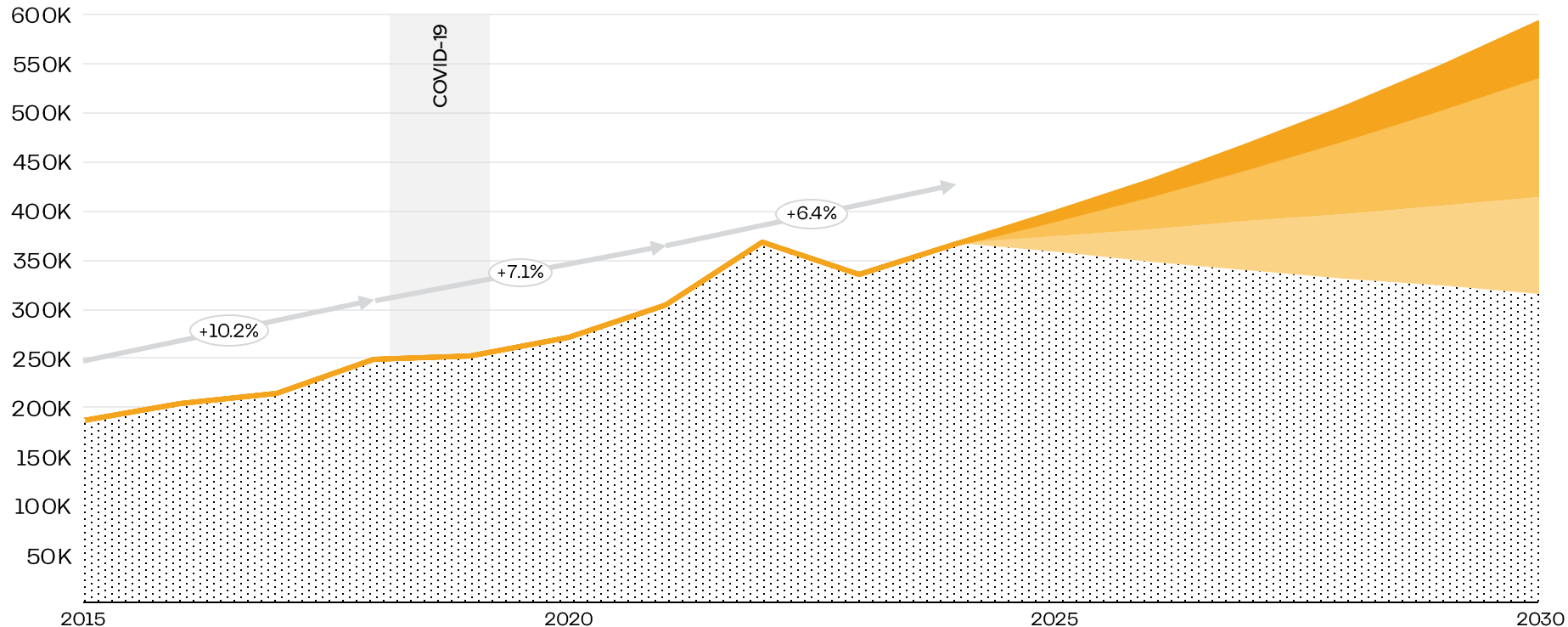
Innovation and
technology

~8.5 million international students will study abroad in 2030

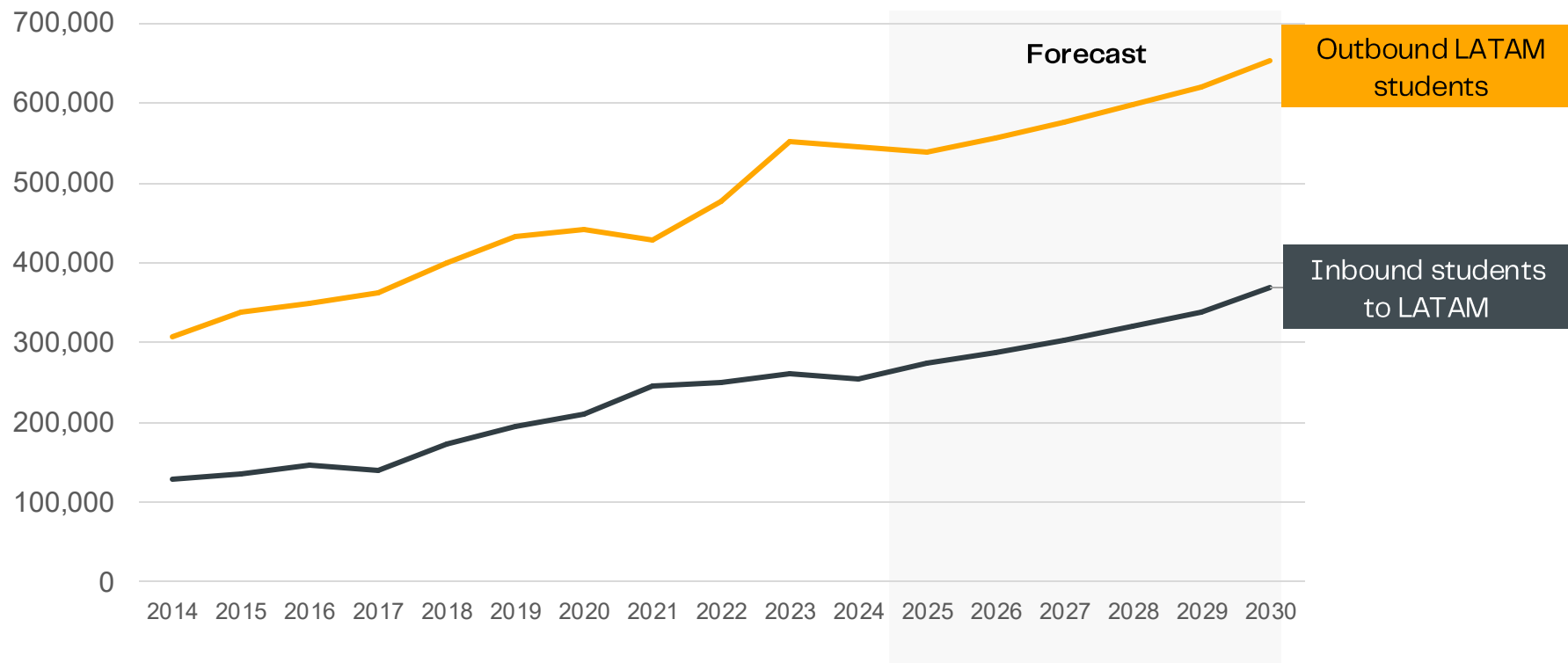
Total Global International Students, 1970 – 2030F



With over 400,000 of these expected to study in LATAM by 2030

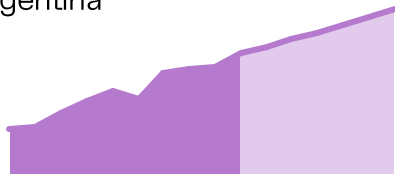


But LATAM is projected to lose more students to other destinations than it will gain



LATAM destination country trends 2015-2030F

Argentina



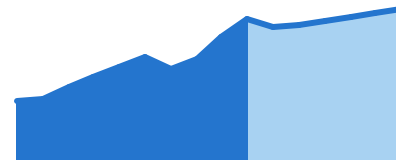
Spain



United States



Canada



Australia



Portugal



France



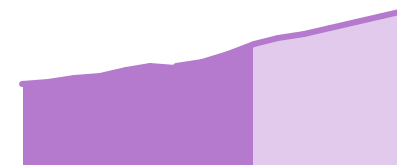
Mexico



Germany



Brazil



Italy



United Kingdom



China



Jamaica



Russia

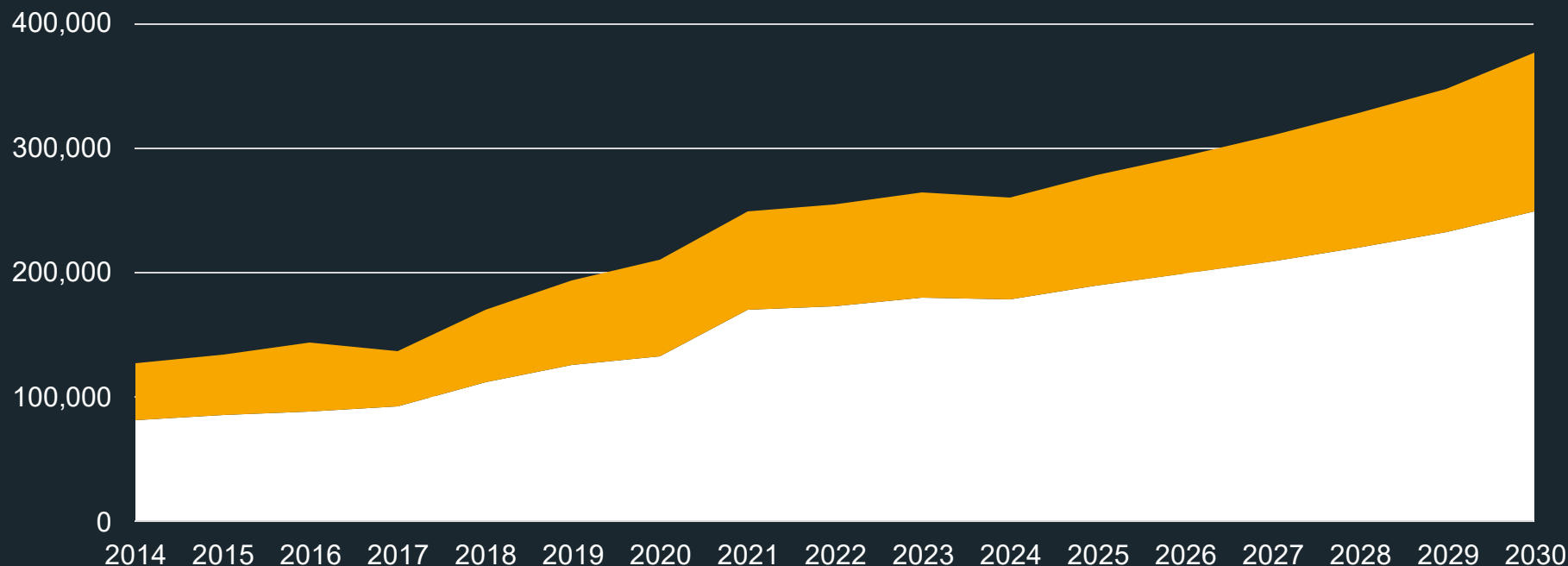


Chile



Most of the growth of international students coming to LATAM will be from within the region

Share of intraregional students: LATAM



Employability needs to be a central pillar of institutional marketing strategies when recruiting international students

44%

of students say a high graduate employment rate is one of the most important factors when choosing a course



3rd most selected course-choice factor

48%

of students say a high graduate employment rate is one of the most important graduate outcome measures when choosing a university



1st most selected graduate outcome measure

53%

of students say learning new skills is one of the most important career considerations when choosing a course



3rd most selected career consideration

But the priorities for different growth markets can vary

	LATAM	US & Canada	Europe	Middle East & Africa	Asia Pacific
High-quality teaching	1	1	1	3	
Scholarships	2			1	1
Good reputation for my subject		3			
Welcoming to international students	3	2	2	2	2
Specific course of interest			1		
Affordable course for my subject					3

How do we minimise the **loss of talent** to overseas destinations and promote Latin America as a destination for **inbound students**?



Education in
2030

Institutional
performance

Student
recruitment

**Skills and
workforce**

Innovation and
technology

Learn-to-earn lifecycle

Schools

Traditional organisations that facilitate learning

Learn

Courses, curriculum, experiences build and maintain skills

Skills

50,000 skills required in ~1,900 different occupations

Jobs

3.3 billion people employed in ~1,900 different occupations

Firms

Millions of firms employ billions of people

QS's industry and occupation taxonomy



1,890 Occupations the Decade that each became “Mainstream”

- Blue Collar
- Green Collar
- White Collar

First industrial revolution – steam power, mechanised textiles, coke-fired iron, canal / early rail. Britain's factory system spread to continental Europe and the US

Second industrial revolution – electricity, internal-combustion engine, telephone / telegraph, scientific management

Mass-consumer boom / “Roaring Twenties” – cheap cars, household appliances, radio, motion pictures, early civil aviation

Birth of the Information Age & environmental regulation – microprocessor (1971), containerised shipping, OPEC energy shocks, founding of environmental agencies

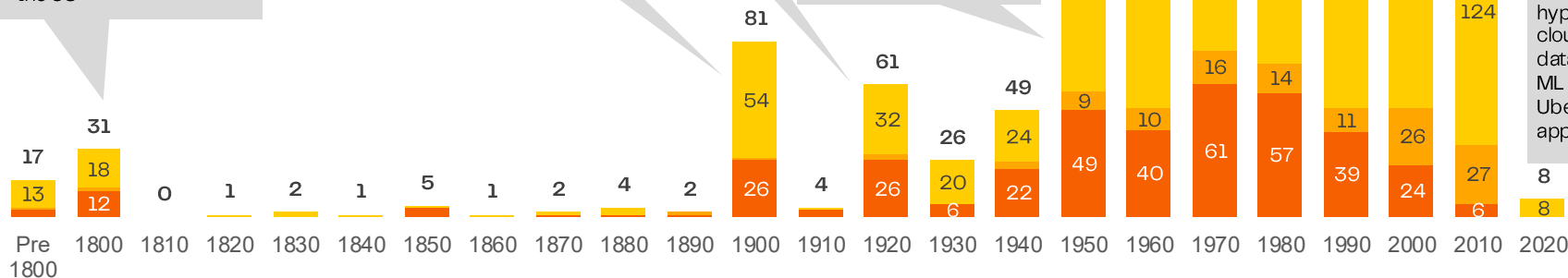
Post-WWII reconstruction & Cold War R&D complex – Marshall Plan re-industrialisation, mass production of TV's / white goods, jet aerospace, nascent semiconductors

PC revolution & financial deregulation – affordable desktop computers, fibre-optic telecoms, Big-Bang liberalisation of capital markets

Commercial Internet & hyper-globalisation – World Wide Web, WTO creation, NAFTA, lean global supply chains

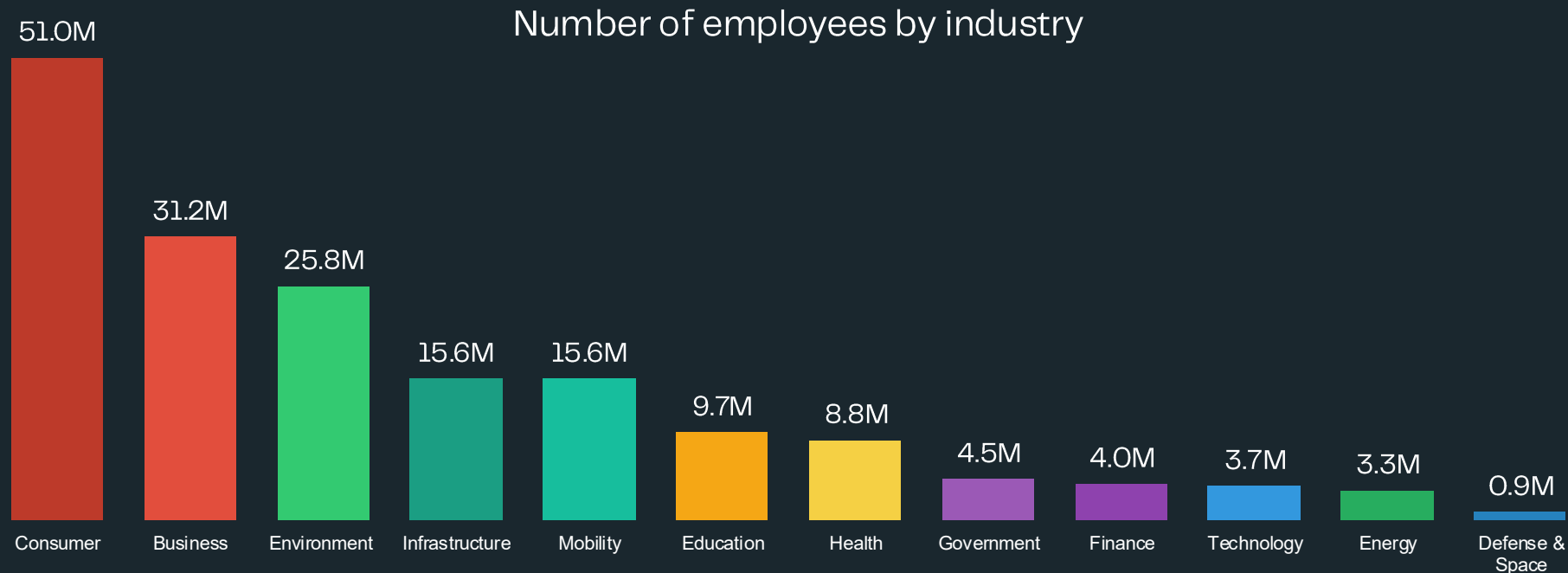
Broadband & Social Media & China's WTO entry – always-on-connectivity, platform economics, off-shoring of manufacturing

Mobile-cloud-AI & the platform / gig economy – smartphones, hyperscale cloud, big-data analytics, ML toolkits, Uber-style apps

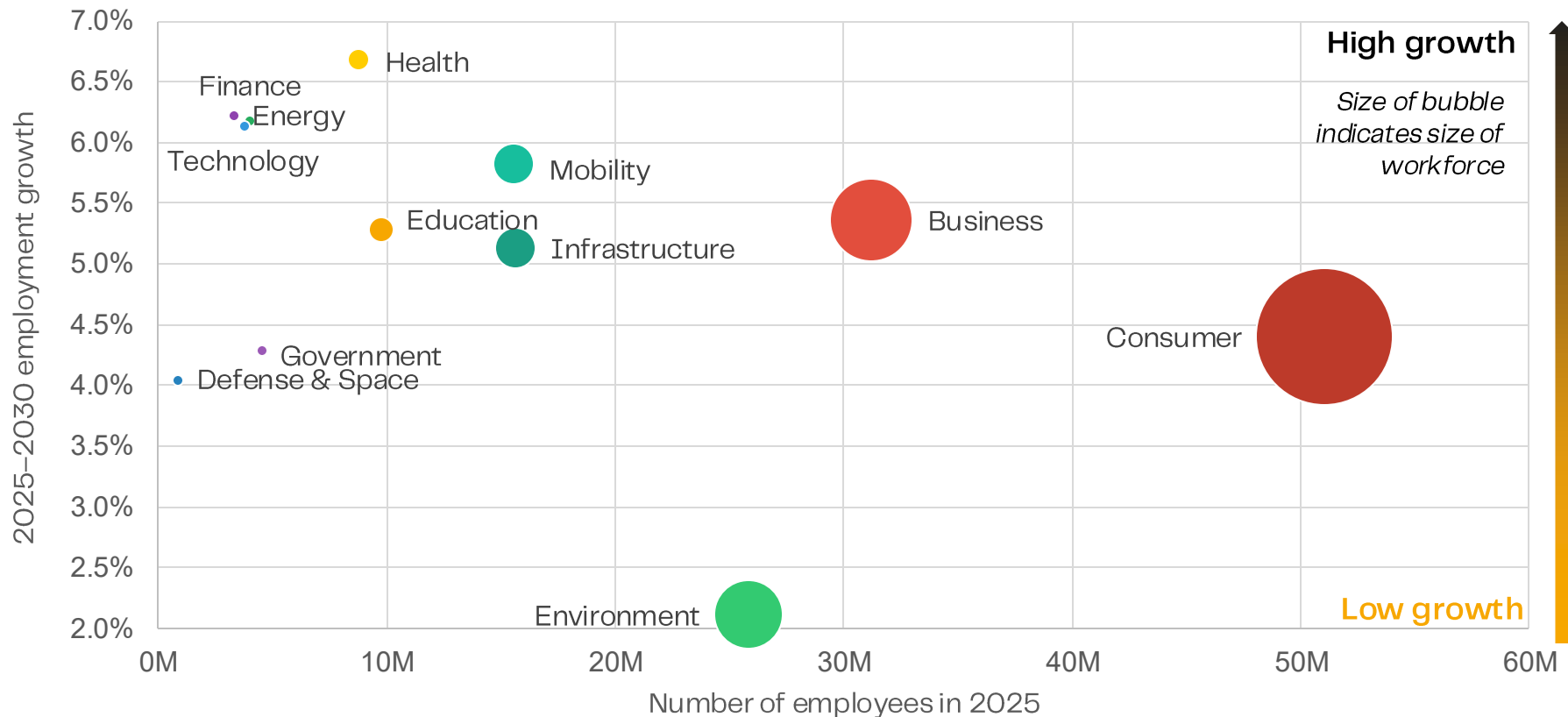


Brazil, Mexico and Colombia Labour Market

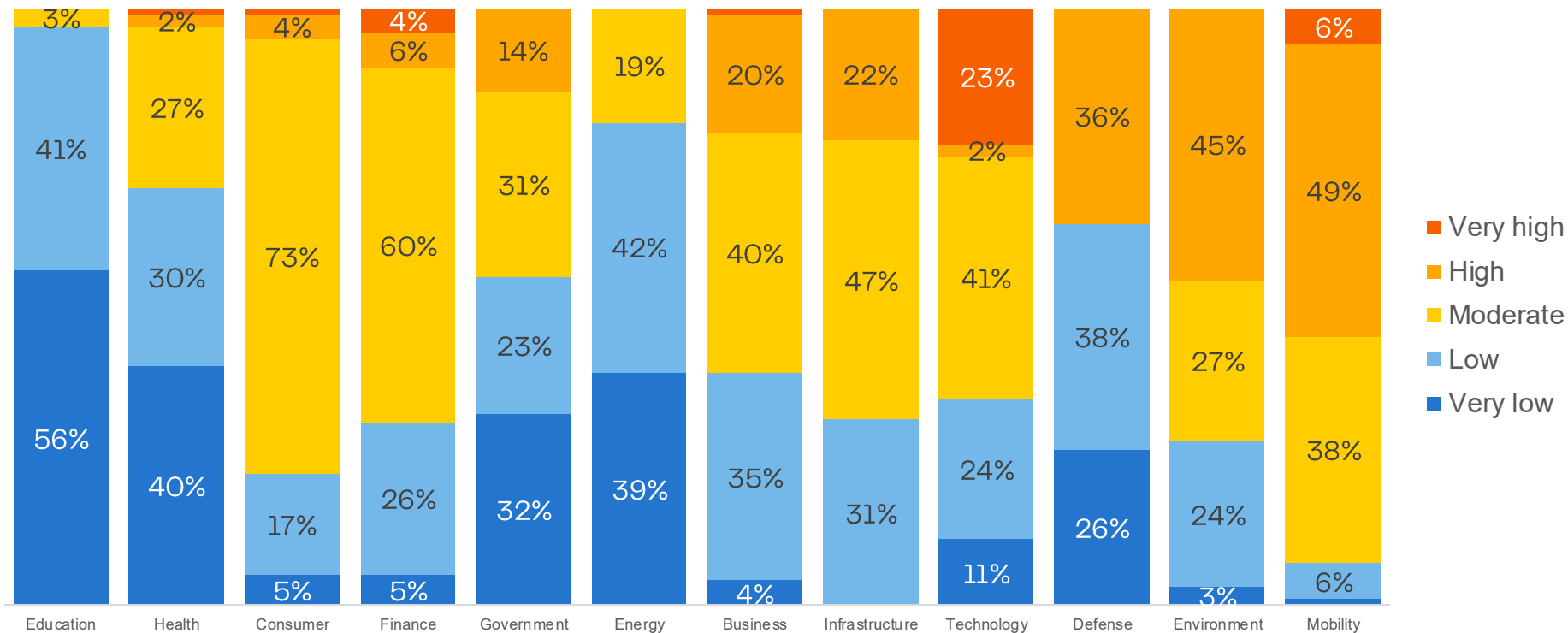
~174m employed persons



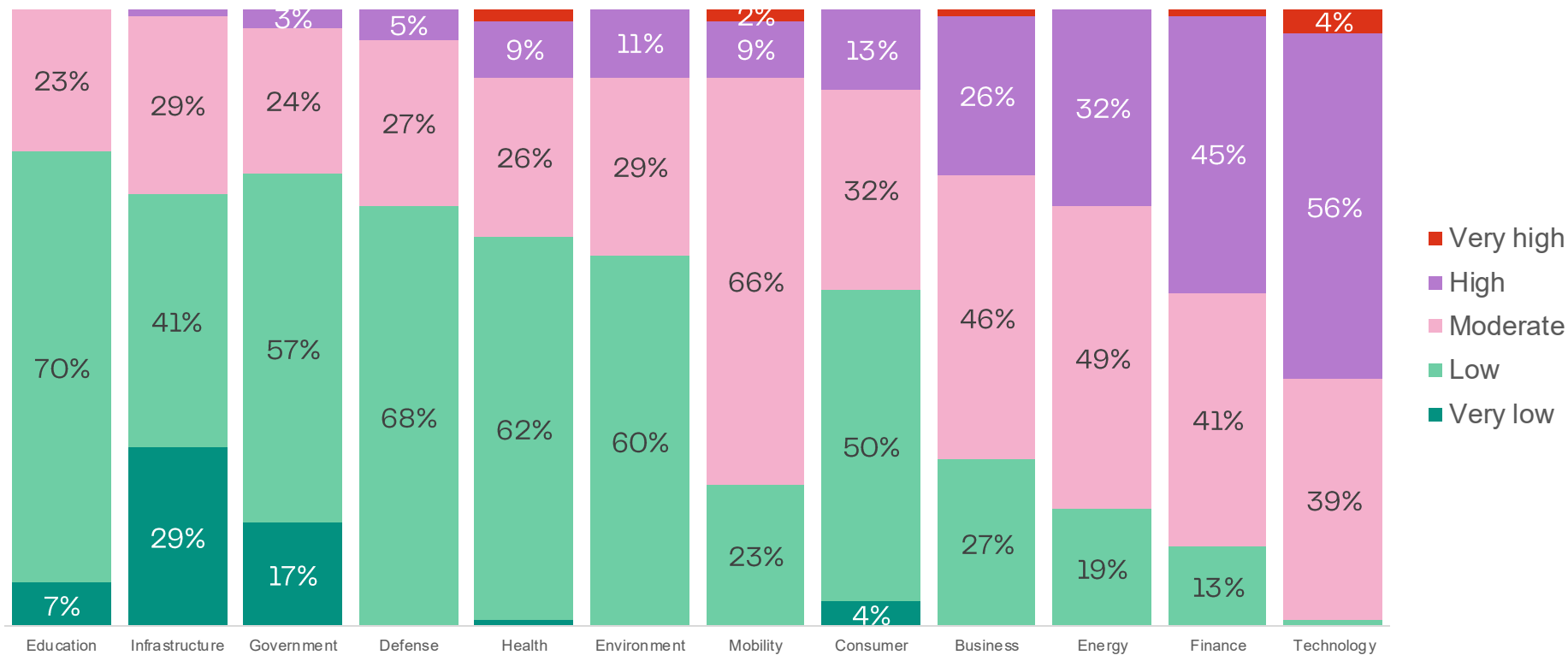
Growth will be uneven across industries



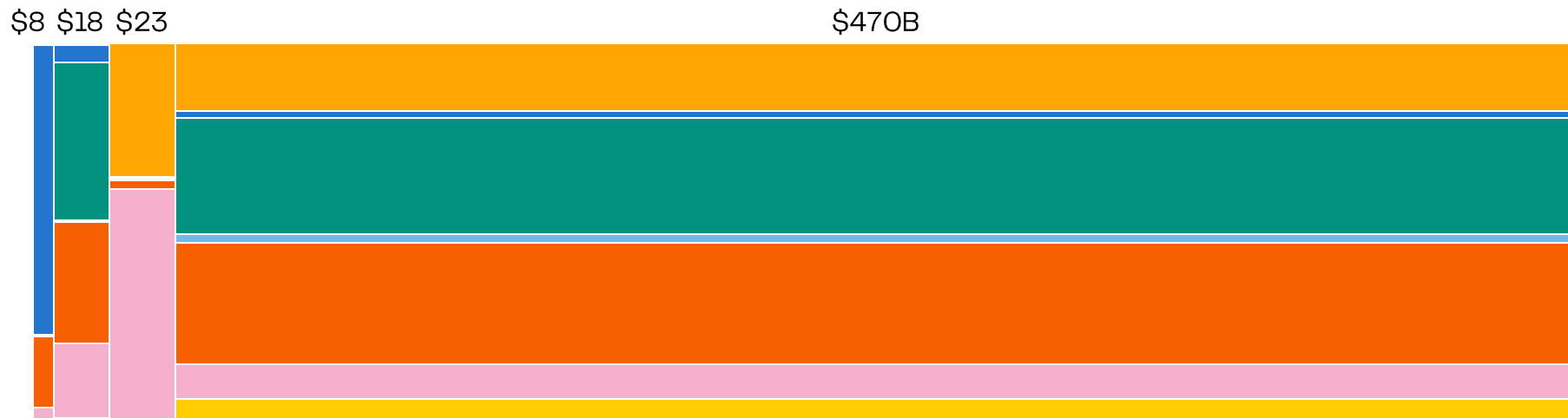
AI automation vulnerability by industry



AI augmentation potential by industry



More than \$500 billion announced to be invested in upskilling and reskilling in the last 12 months



Health
Advanced manufacturing
Green skills

AI & digital

Education in
2030

Institutional
performance

Student
recruitment

Skills and
workforce

**Innovation and
technology**

Where are universities focusing their AI efforts?

Category

Strategic objectives for AI

Institutional mission

- Transforming the student experience and outcomes
- Advancing research
- Providing opportunity for all students

Operational efficiency

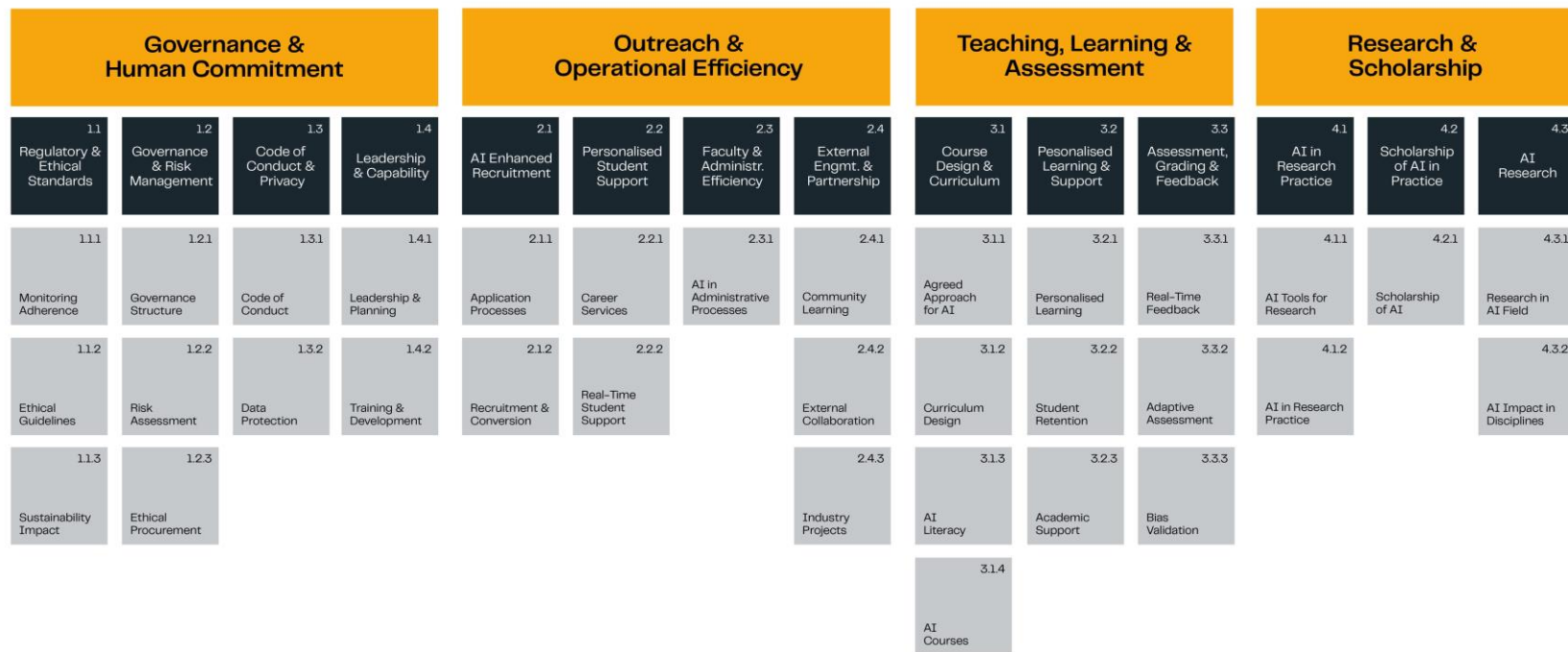
- Achieving efficiency, access and transparency
- Competitive positioning for the future

Innovation and transformation

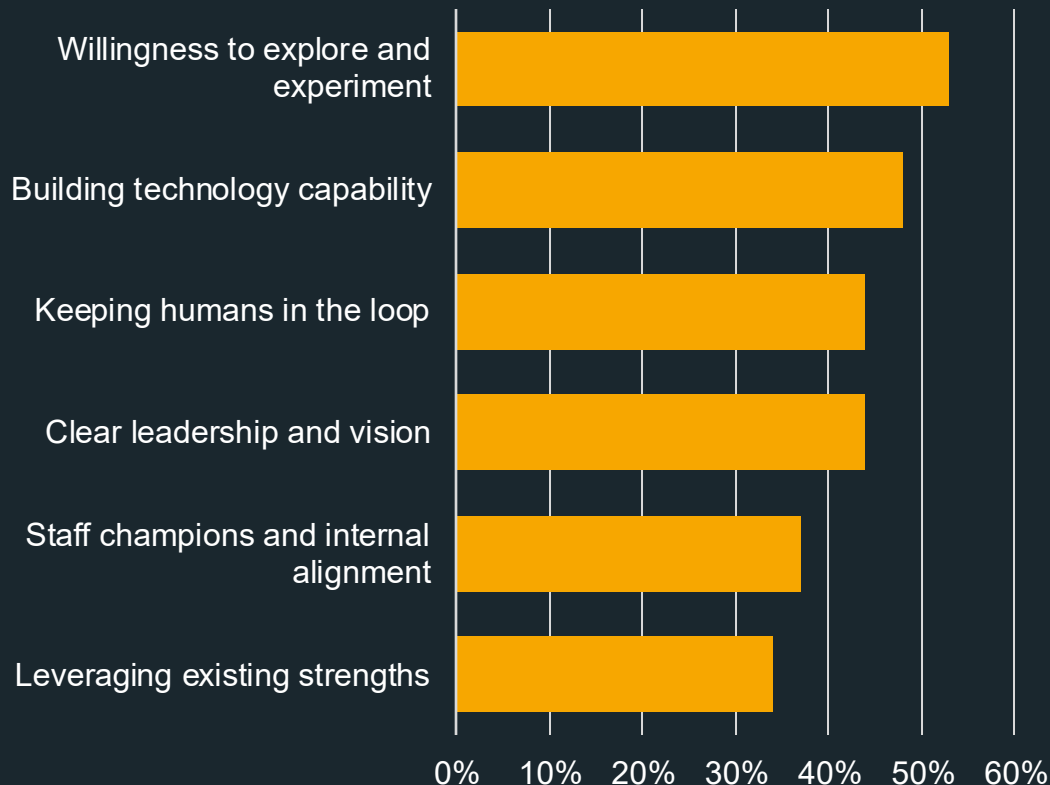
- Advancing a culture of innovation
- Redesigning organisational and operating models
- Strengthening governance and accountability

QS AI Capability Framework

An open-source framework that helps universities evaluate and strengthen their AI capabilities. It provides a structured way to assess current AI use, identify areas for improvement and support strategic decision-making. The Framework is built around four key pillars, with 14 indicators and more than 30 sub-indicators used to assess institutional capabilities.

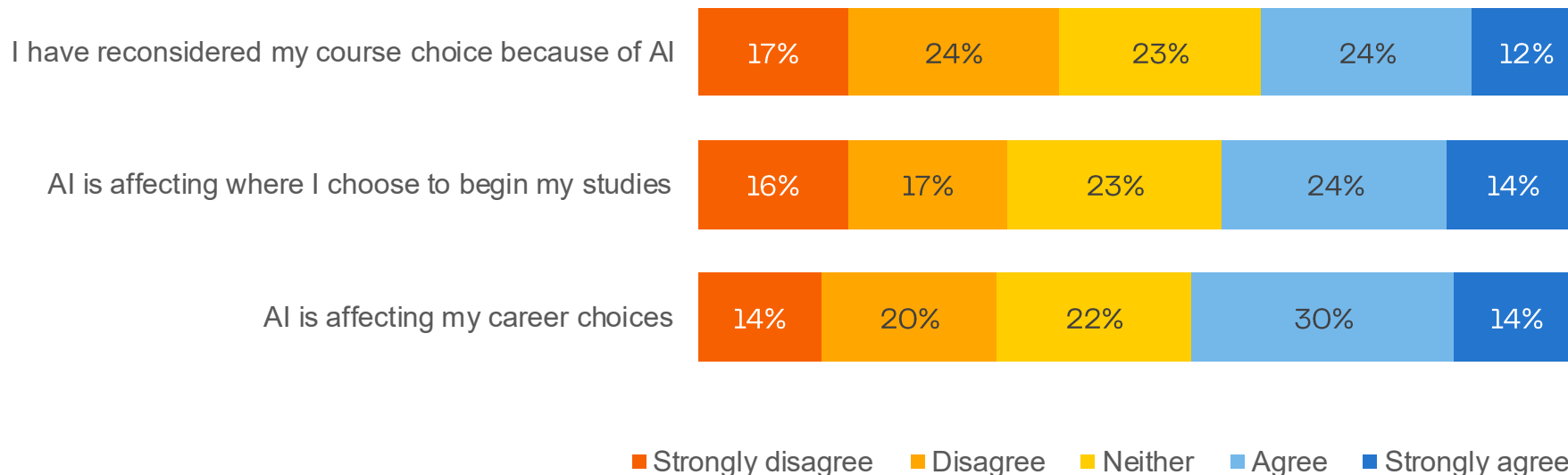


The willingness to explore and experiment is seen as the biggest contributing factor to successful **AI adoption**



AI is shaping students' study and career decisions

To what extent do you agree with the following statements?



Access more regional insights

Visit [QS.com](https://qs.com) →

