



Reimagining student experience in higher education

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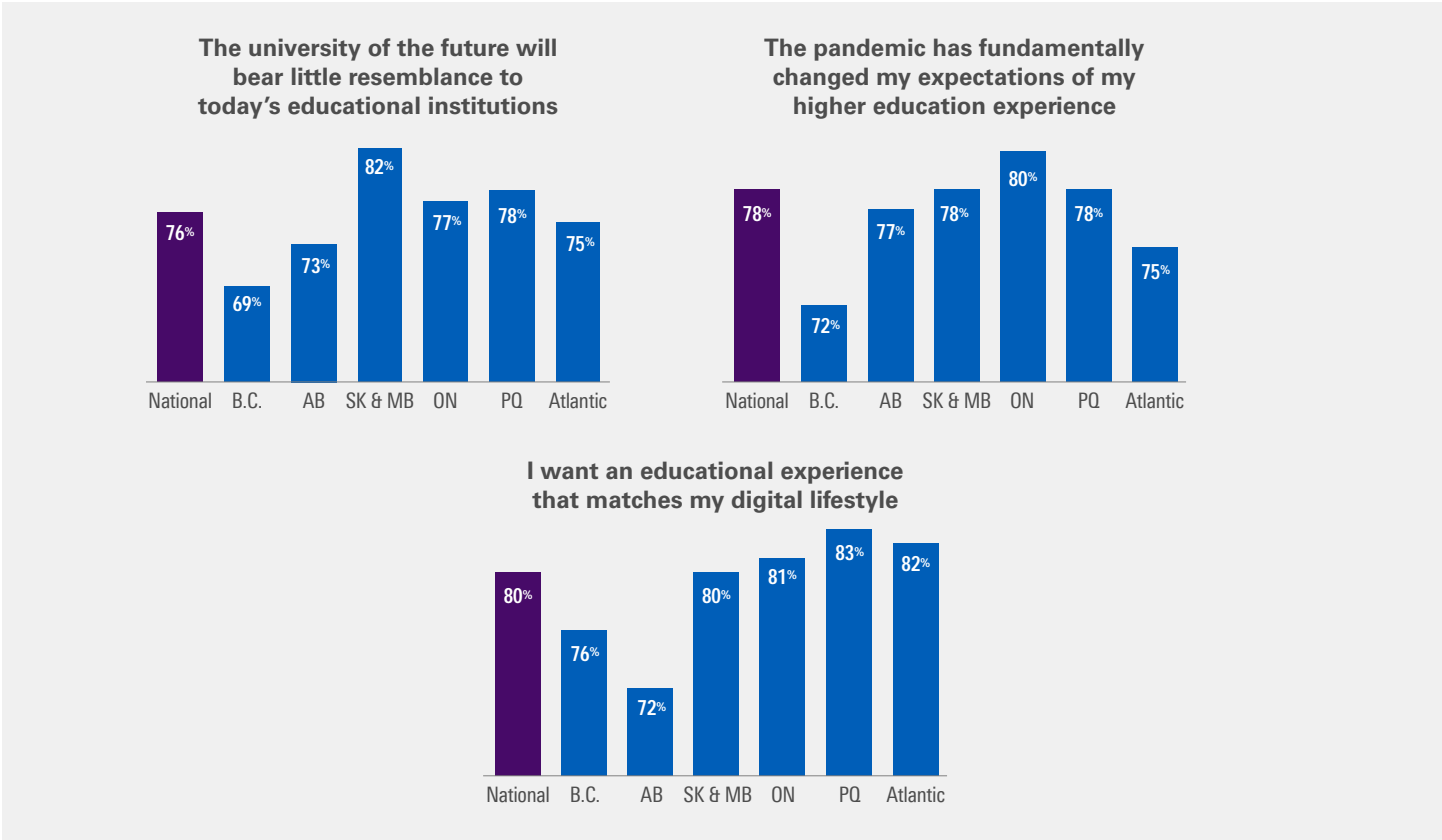


The higher education landscape has been steadily shifting over the years to respond to changes in the economy and society as a whole. Some of these changes have been gradual, while other more recent ones have been sudden and parabolic in nature.

In 2020, the pandemic opened our eyes to what is possible and, in fact, accelerated what was already underway in how individuals, institutions, and societies connect with each other through the use of technology. Such events and trends have fundamentally changed students’ expectations of their higher education experience.

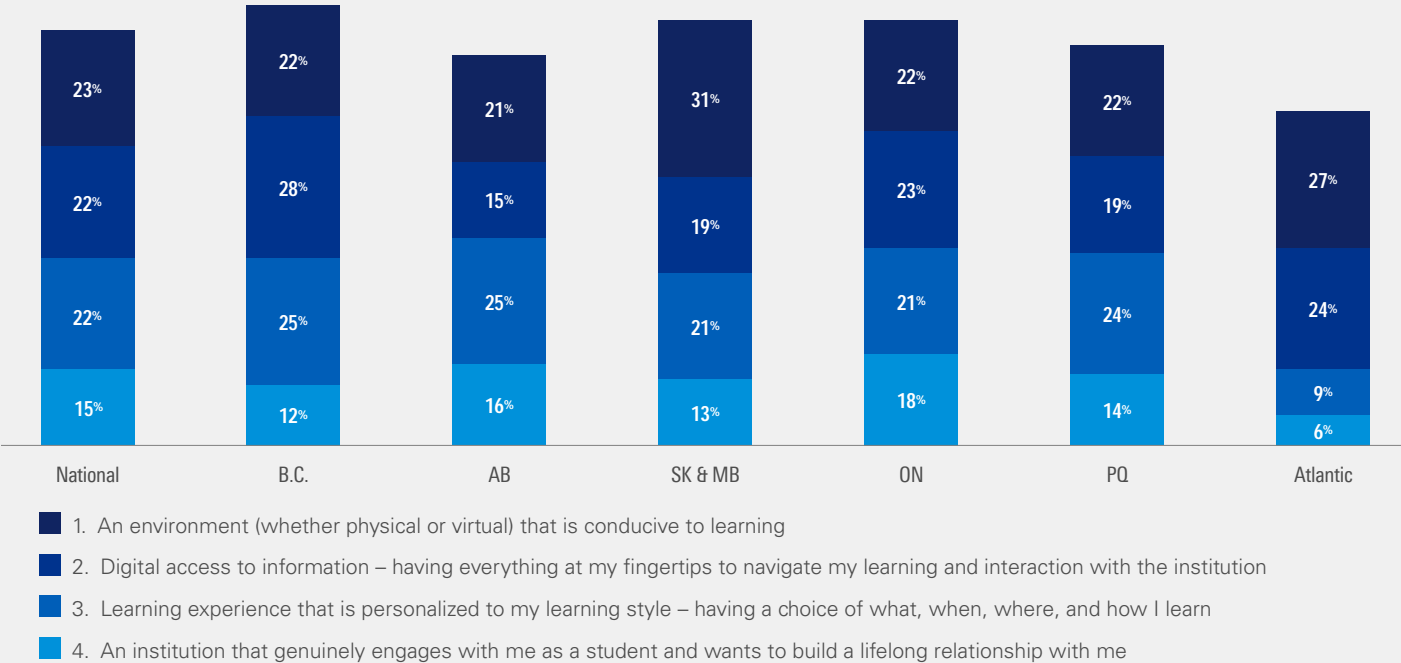
The “Age of the Customer” is upon us, and the implications for education cannot be ignored. The increased choices and options available to students are having a profound impact on how students view their education experience. The institutions that can deliver high-quality educational outcomes with excellent student experiences and qualifications that are well recognized by employers at a competitive cost, will gain significant competitive advantage. Leveraging technology will increase accessibility and efficiency, lower costs and provide competitive services moving into the future landscape.

KPMG in Canada undertook a national poll of students and they told us that they believe that the educational institutions of the future will bear little resemblance to those of today. This is an indication that students expect institutions to change along with their shifting priorities and expectations. Student experience is measured through all of the interactions they have with their higher education institutions, and they are now expecting new levels of engagement and personalization, both in the classroom and while engaging with various services offered by institutions outside of the classroom. The importance of a digital experience was clear, as an overwhelming majority of students want their school to provide the kind of “easy to use and straightforward” digital customer experience they expect in other walks of life.



The results of the poll also indicated the top four drivers, other than lower cost of tuition, that influence student experience:

Top four drivers influencing student experience



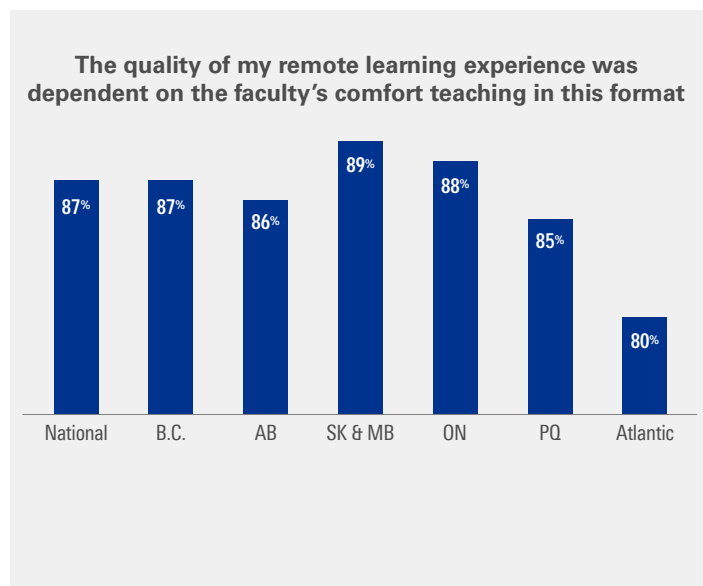
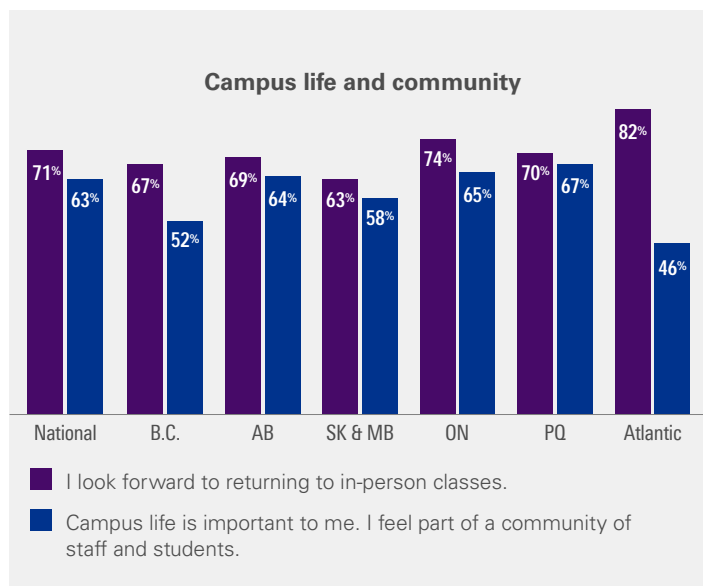
The pressure to improve the student experience is increasing steadily, yet rapidly, and higher education institutions will need to consider and keep up with the evolving priorities of their students. The institutions that seek to understand the drivers that influence student experience and spend the time to seek out the preferences of their students will gain significant competitive advantage and will be the ones who excel. We will explore each of the top four drivers influencing student experience.

An environment conducive to learning

Preferred higher education institutions will be the ones that are able to effectively collaborate with their students to understand what they are looking for in order to build an education experience that is focused on the students’ values and priorities. Ultimately, traditional institutions must be ready to respond and adapt to changing ideas about what higher education should look like. They must utilize their power to convene students together on campus in collaborative ways while modernizing the student experience through digital experiences and technology. This will require educators to

continually upgrade their own capabilities. Eighty-seven percent of poll respondents noted that the quality of their remote learning experience depended on not only the technology and accompanying infrastructure, but also the faculty’s comfort and ability to teach in this format. Institutions will need to foster skill growth in the faculty to match technological demands of today.

Nothing can fully replace the importance and gratification of the human connection and the feeling of being part of a community. Exacerbated by extended pandemic conditions, poll respondents indicated that there remains a critical need to reconnect. In spite of the challenges, it served as a dress rehearsal of what the future could look like and the possibilities fueled by innovation. The pandemic showed us that a combination of online and in-person programming is likely the best way to foster student engagement and learning. As much as remote learning was implemented quickly and students found it to be generally effective, in-person interaction and campus life will always be a vital component of an optimal student experience. Courses of the future will likely be a combination of being delivered through technology and supplemented with in-person support.



Technology and digital access

After more than a full year of remote learning, Canadian post-secondary students – raised on social media, streaming, food delivery and ride-sharing apps – expect their college or university to up their game digitally. Over the years to come, students will become even more digitally savvy, putting pressure on higher education institutions to design and deliver an experience that matches their digital lifestyle. Students expect to have seamless accessibility and interaction with their higher education institution, resulting in a need for investment in new and enhanced tools to be used in the classroom as well as throughout the campus in delivering other services.

The acceleration of digital education due to the impact of COVID-19 has shown students what is possible. Remote learning and hybrid learning is now commonplace. Institutions are seeing a significant rise in competition from “online” institutions around the globe. The emergence of new, non-traditional institutions that may offer more affordable online education poses a definite challenge, and while the impact to date has not been significant on Canadian institutions, the effects of technological change on students means this risk is unlikely to decrease.

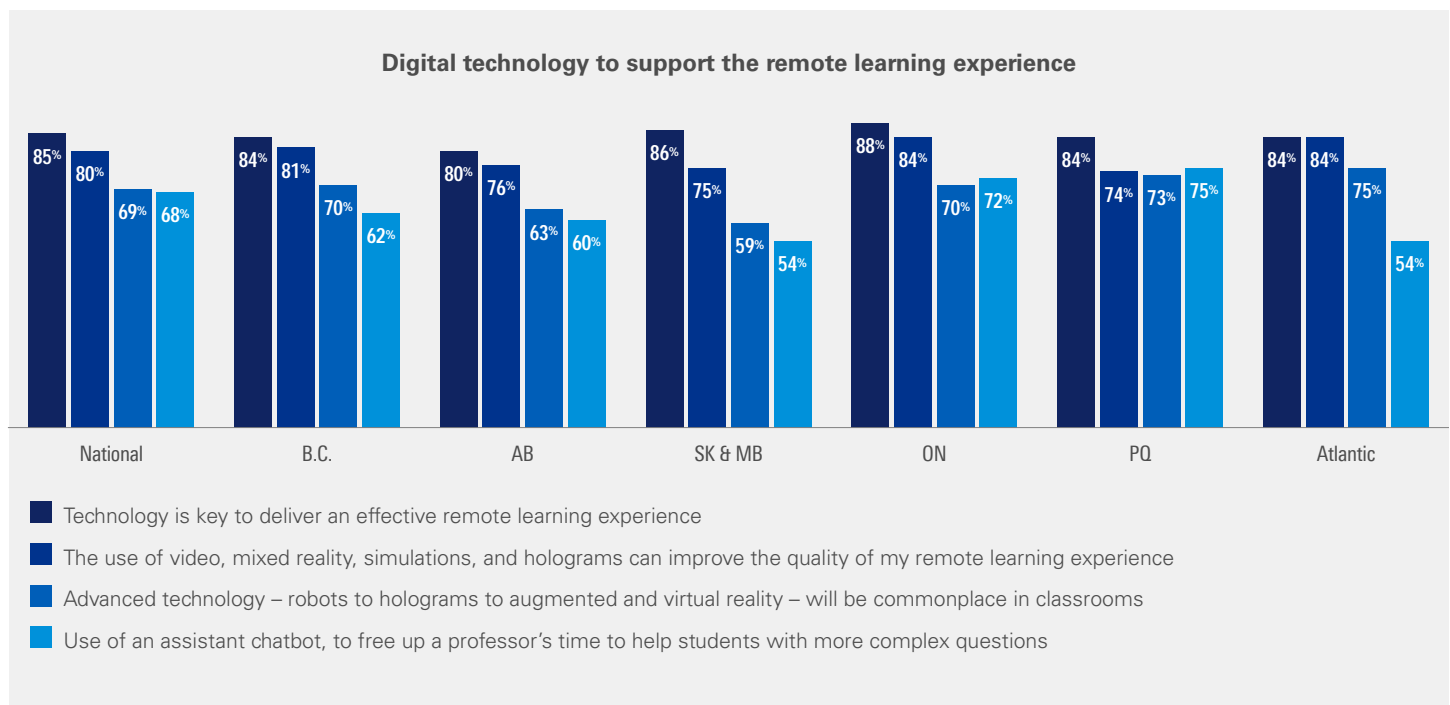
Remote learning is enabled by technology. Information technology infrastructure and facilities will need to be enhanced

in many institutions to support a seamless learning experience both remotely and in the physical classroom. As technological capabilities and opportunities proliferate, student expectations have been raised to envision a more encompassing digital learning environment. The poll revealed an interest, even an expectation, in the adoption of a variety of current and futuristic technologies to enhance the delivery of their education.

Interactions and transactions should be through easy-to-use, digitally-accessible platforms. This also includes the ability to efficiently contact and communicate with the faculty. It is imperative for every higher education institution to have a robust digital and technology strategy that establishes the foundation for a successful remote or hybrid learning experience.

Personalized learning

Successful institutions will be those that can create personalization at scale across their diverse and changing cohorts of students – those currently studying at the institution and those returning after graduation to upskill and retrain. A digitally-enhanced educational experience that can allow students to navigate their own journey through the institution, from how they connect with their courses, course materials, faculty, classmates, services at the institution, and potential employers has become a wish of today's students, and will be a requirement for the students of tomorrow.



Lifelong learning has become a human need. With the rate of change, workers will require ongoing education. *“Twenty years from now, lines between people’s learning and working lives will be increasingly joined. Learning will not be something you graduate from to transition to a job but will be a lifelong journey of upskilling and micro-credentialing to keep up with exponential advances in technology and changes in the workplace that will build a better economy and society.”* **(KPMG in Canada: 20 predictions for the next 20 years)**

The “new normal” continues to unfold, with implications for the future economy and workforce. More than eighty percent of students polled believe that institutions should provide micro-credentialing for pre-and-post graduate studies. They are looking for customization – stand-alone, short-duration, competency-based focused content with increased accessibility and flexible delivery. A micro-credential framework can provide them with in-demand skills recognized for employment and career opportunities. Institutions that position themselves to meet these expectations will thrive as they will serve as a bridge between students, businesses, and communities.

In addition to supporting students’ personalized needs to upskill and retrain, institutions must also approach students

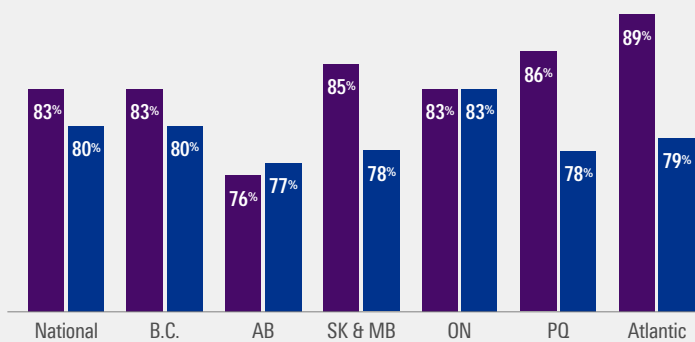
with a whole-person philosophy, including their overall well-being. Investing in the whole student in areas such as mental health awareness and supports to help with their two main concerns identified in our poll of “feelings of stress” and “motivation” during remote learning, along with incorporating soft skills such as problem solving, empathy and emotional intelligence, will help them to effectively navigate this changing and challenging world, both within the institution and in their off-campus life. This was evident in our survey, as students noted that they are not only looking for textbook technical skills but also feel that institutions should teach them skills to help them be a balanced whole-person. Some students managed exceptionally well through the remote learning environment, yet some yearned greatly for in-person learning. Institutions will need to rethink how best to ensure

all students function at their best. The opportunities afforded by offering these supplemental knowledge and skills will also create a reciprocal loyalty as students will acknowledge the investments made by the institution.

Engagement along the student journey

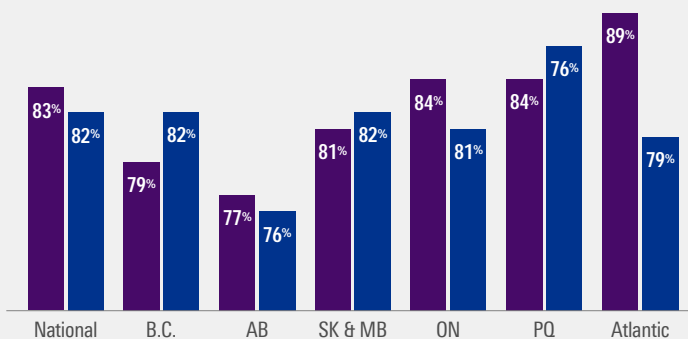
The student journey starts from optimistic applicant, to active student, to proud alumnus. Understanding the components of the extensive student journey, along with the overlapping needs and

Micro-Credentialing

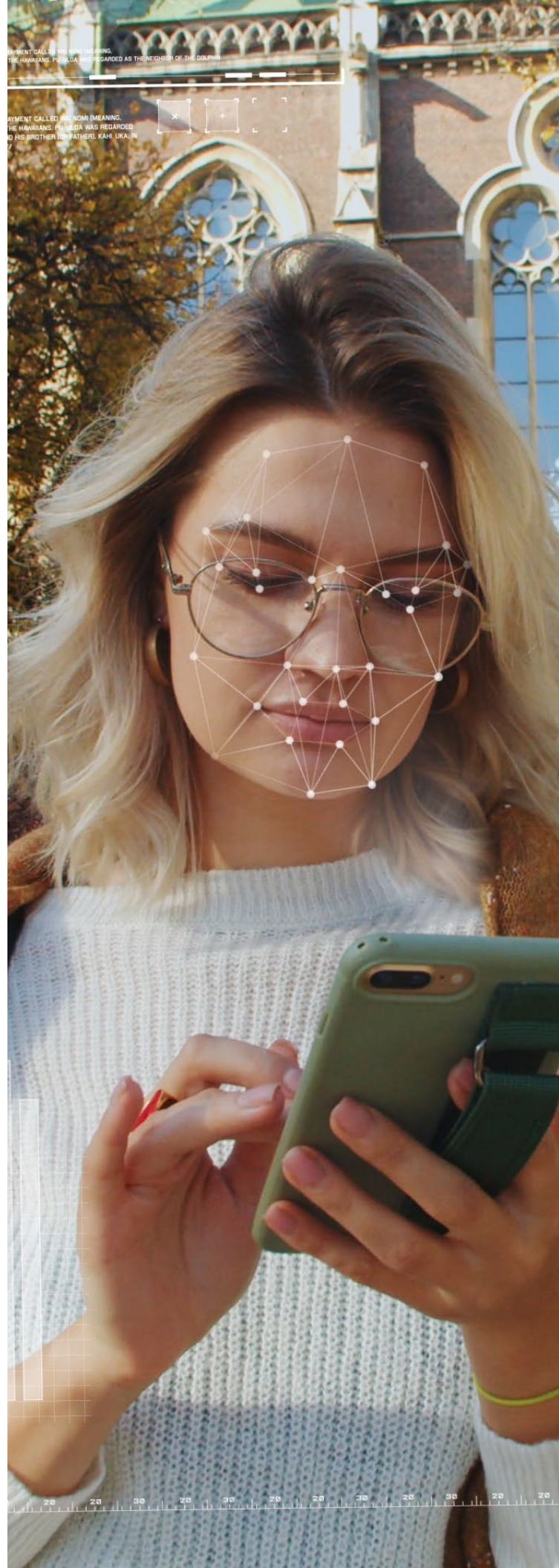


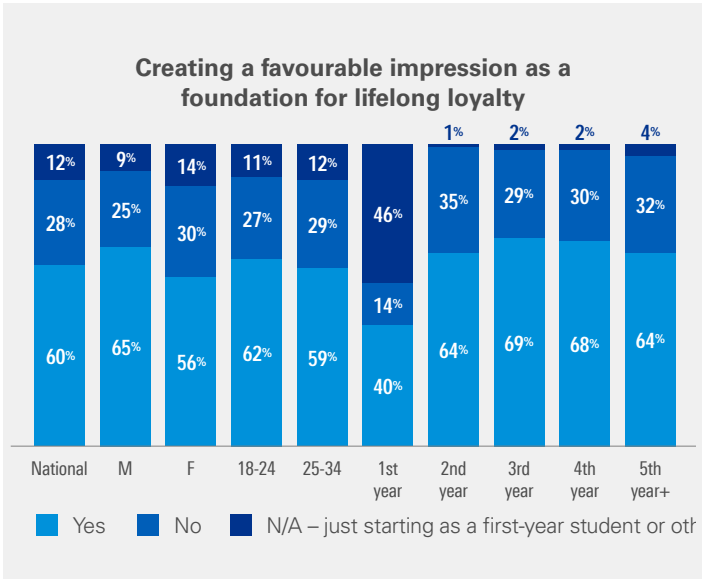
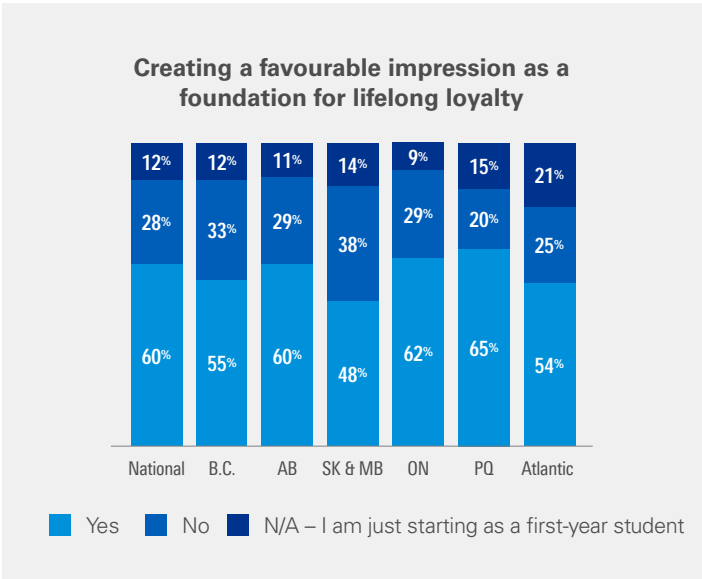
- I prefer if my institution also offered micro-credentialing programs (to show competency/mastery in particular areas) to help me retrain or upgrade my skills to find a job
- I prefer if my institution offered post-graduate micro-credentialing programs

A balanced whole-person focus



- I think my post-secondary school should also help me develop soft skills, like creative problem solving, empathy, and emotional intelligence
- I wish my post-secondary school had a stronger focus on mental health and well-being



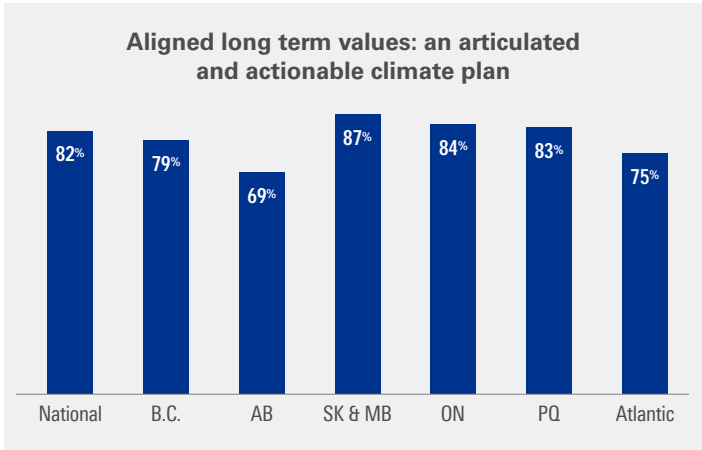


supports related to each segment, while being thoughtfully presented and delivered, holds the promise of prolonged engagement.

Building lifelong loyalty and sustaining a connection with students beyond their graduation and across their lifespan is paramount. Not only will they return to the institution for upskilling, reskilling, and retraining, but they will be motivated to give back to their home institutions through their time, energy and resources. Those who have had a positive, impactful student experience will have the impetus to remain connected and encourage others to join them. In our poll, we asked whether students felt that their experience to date with their higher education institution has “created a favourable impression” and whether that has “built a foundation for lifelong loyalty”.

Results revealed that while approximately sixty percent of respondents are on track with a positive institutional relationship, there remain challenges and opportunities to explore in order to forge the high-quality relationships that will endure a lifetime. Many first-year students are currently undecided, based on their limited experience, therefore institutions would be wise to take the initiative now to investigate, understand and address their needs, as well as those of the other various cohorts of students.

A key part of the process of developing lifelong loyalty is to better understand students’ priorities through a social lens. Students are increasingly embracing their socially



responsible selves, with the long-term future being top of mind. For example, those polled displayed strong convictions about the critical topic of climate change. Not only did they express that “climate change is important to me”, but also expect their institution to have a “clearly articulated climate plan” accompanied by defined goals and strategies to be carbon neutral sooner than later. It will be vital to align with, and embrace, the values and priorities of both current and future generations to address these formidable challenges. Partnering together on these and other meaningful issues over time will undoubtedly lead to further engagement and the probability of lifelong loyalty.

Conclusion

Education is student-centric, now more than ever in the “Age of the Customer”. While the data reported from our poll reflects students’ main priorities currently and into the future, it is just a glimpse into the student experience they expect from their higher education institution.

We have merely scratched the surface of what needs to be done and what can ultimately be achieved by institutions to improve the student experience. Today’s students are tomorrow’s industry leaders, and their experiences will greatly influence the brand and reputation of the higher education institution, ultimately impacting the ability of the institution to be sustainable in the long run. A great student experience has a direct correlation to lifelong loyalty and genuine partnership.

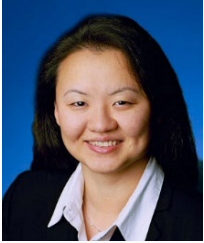
How KPMG can help

KPMG Connected Enterprise for Higher Education is a consumer-centric, enterprise-wide blueprint for digitally transforming higher education institutions. It is a robust framework that helps deliver a seamless, consumer-centric experience. The Connected Enterprise framework helps pull the elements of these four building blocks – reviewing the strategy, mission and purpose; improving core capabilities; adopting a target operating model; and modernizing technology – through the connected lens, aligning them to the strategy that an institution has chosen.

KPMG can guide Higher Education institutions through the three steps to build a great Student Experience (SX):

- Know your current and future students deeply and in detail, and develop an evidence based SX strategy that meets the needs of your students and your institution
- Establish your brand, reflecting the SX promise you’re making as an institution
- Become student centric by taking a whole of institution approach to change in by implementing a student operating model and enabling the right technology

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