

2018  
Sodexo  
University  
Trends Report

# 5 TRENDS SET TO IMPACT THE STUDENT JOURNEY AND CAMPUS EXPERIENCE



# Inside the 2018 Sodexo University Trends Report

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# A WORD FROM SATYA MENARD

CHIEF EXECUTIVE OFFICER, SODEXO SCHOOLS & UNIVERSITIES WORLDWIDE

The higher education landscape is shifting, driven by social, economic, digital and cultural forces that are impacting students globally. At Sodexo, we partner with more 700 universities across the globe and we are constantly educating ourselves about key trends in student demographics, behaviors and needs. Our goal is to expand and adapt our services to meet students' needs and more effectively help universities plan for the future.

In compiling this report, we spoke with a highly credentialed lineup of international experts to identify and understand five trends shaping the future quality of life in higher education, and some of the ways universities are evolving to accommodate these shifts. We identified the following five trends:

- 1 **The need to prepare students for a rapidly evolving work environment.**
- 2 **An increase in first-generation students with unique support needs.**
- 3 **A digitally native audience that expects technology to enhance its experiences.**
- 4 **A shift in the role of the campus from ivory tower to flexible and open learning community.**
- 5 **A student body comprised of students of all ages, at all stages in their careers.**

For instance, universities are transforming libraries into collaboration spaces; students are enjoying mobility across campus locations; students are using technology to connect, collaborate and manage their own learning pathways; and the campus community is rallying around the needs of all students, including first-generation and returning students.

While these trends each cover a distinct and critical area of evolution for the modern university, they are inarguably related to one another. For example, technology advancements enable a more creative blend of virtual and physical spaces on campus, and a focus on first-generation students helps universities support the individual needs of every student.

I hope that you find this report informative and helpful in light of the rapid and widespread change upon us. It is incumbent on all of us—not only higher education institutions, but also public authorities, parents, communities, corporations, partners and suppliers—to work together to support students and to contribute to a successful on-campus experience.

Learn more about how Sodexo University Services focuses on enhancing the quality of life on campus at [www.sodexo.com](http://www.sodexo.com)



## This report is supported by the Sodexo Institute for Quality of Life

The Sodexo Institute for Quality of Life is founded on Sodexo's conviction that improving quality of life leads to the progress of individuals and contributes to the performance of organizations. The Institute's objective is to gather and develop insight into the drivers of quality of life and their impact to help Sodexo deepen its understanding.

## ABOUT SODEXO

Sodexo is the only company in the world that offers integrated Quality of Life Services to its clients—through On-site Services, Benefits & Rewards Services and Personal & Home Services. For over 50 years, we have developed unique expertise, backed by nearly 460,000 employees serving 100 million customers each day in 72 countries across the globe.



# EXECUTIVE SUMMARY

The demographics, needs, expectations and behaviors of university students are changing, and along with them the campus environment. We worked with the Sodexo Institute for Quality of Life and a global panel of higher-education experts to identify and understand five key trends shaping the future of the student experience, and how universities are evolving in response.

## Trend 1

### **Beyond Academics**

— Preparing students to thrive in a complex world

Across the world, rapidly changing economic, political, social, technological, cultural and environmental forces are reshaping young people's daily lives and their futures. "Preparing students" takes on an hugely expanded mandate beyond academic education. It includes extracurricular programs and personal growth experiences that support students' mental well-being and help them develop their outlook on global issues to prepare them to address an ever-evolving landscape.

## Trend 2

### **First and Foremost**

— Engaging the growing number of first-generation students

The world's middle class is expanding, and with it a new generation of university students is emerging. As the number of first-generation university students grows, universities are working to recognize, engage and provide support for them. The benefits reach far beyond a single student subset to the entire campus, extended families and the students' communities.

### Trend 3

#### **Connected, Enabled and Personalized**

— How technology can enhance student experiences

Many undergraduate university students today are digital natives: they expect easy access across a breadth of digital platforms to enhance their everyday experiences at university. From recruitment to daily student life and post-graduation interactions, technology is becoming an increasingly important factor in student engagement.

### Trend 4

#### **A Fundamental Shift**

— The next evolution of brick-and-mortar universities

Global student population expansion, technological progress and student mobility are changing the way students see—and experience—the physical university campus. In response to these shifts, universities are offering blended learning models, more collaborative spaces and customized learning journeys to engage and connect students with each other, the campus and surrounding communities.

### Trend 5

#### **Lifelong Learning**

— Adapting and evolving to accommodate a multi-generational student body

As technology drives changes in the workplace, education is shifting from the traditional 'one-and-done' model serving a small slice of the young adult population to a broader audience over the lifecycle. This group includes older adults looking to improve and expand their skill sets to keep up, keep working and continue learning. Universities are exploring how to connect, provide for and inspire remote learners, working adults and returning students.

Universities continue to compete for an increasingly digital, mobile, diverse and cost-sensitive pool of students globally, and those that succeed will offer a more flexible, holistic and inclusive experience.

**Based on these trends, the university of the future will embrace blended digital and physical learning environments, increased collaboration among students and across the community, digitally enabled campuses and support for a diverse student population that goes far beyond the academic.**



# **TREND 1**

## **BEYOND ACADEMICS — PREPARING STUDENTS TO THRIVE IN A COMPLEX WORLD**

### **A CHALLENGING LANDSCAPE**

Rapidly changing economic, political, social, digital, cultural and environmental forces are reshaping young people's daily lives and their futures. Globalization continues to deliver new perspectives, cultural diversification and improved living standards for many, while deep inequalities remain unresolved and pose great challenges. Disruptive technologies, such as artificial intelligence and the Internet of Things (IoT), are upending entire industries and changing how we work. Environmental concerns, from energy to materials and biodiversity, are forcing us to rethink how we behave. These factors, along with increased academic and social pressure, contribute to increased anxiety and uncertainty amongst university students.

In response, universities are carefully examining how to prepare students for a complex world. This involves addressing how, when, where and why students choose to learn. It also entails a mandate that expands beyond academic education. Extracurricular programs that support students' mental health, courses that encourage personal growth, safe spaces that challenge students to ask questions, analyze data, and develop their outlook on global issues—these are all ways for universities to prepare students for today's complex and challenging landscape.

# What's shaping the student body



The rapidly evolving future that today's students are preparing for is far different from the certainty their parents and grandparents experienced. In fact, many students today are training for jobs that don't yet exist.

Four factors that shape a new approach to preparing students for a culturally diverse, digitally disruptive world—including the workplace—are:

**1**

**Evolving  
skill sets**

**2**

**An eclectic  
student  
demographic**

**3**

**Global  
perspective**

**4**

**Increased  
academic  
and social  
pressure**

## 1. EVOLVING SKILL SETS

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The world of work is undergoing profound transformations. The IoT, data analytics, cloud computing, mobility and cybersecurity are rapidly changing the way we live and work. Indeed, in a report entitled “Predicts 2016: Algorithms Take Digital Business to the Next Level,” Gartner (a global research and advisory firm) estimates more than half of all new business systems and processes will incorporate IoT in some way by 2020. As a result, it is very likely that many students enrolled in 2018 will eventually work in jobs and roles that don’t yet exist.

more than  
**50%**

of all new business systems and processes **will incorporate IoT in some way by 2020.**

To stay relevant, students’ skills and capabilities must be honed to adapt throughout the life-course.

“There’s a shift in what’s considered success in work and life, And it goes well beyond academic knowledge. There’s a decrease in the need for routine, manual, and cognitive skills, and an increase in the demand for social and emotional skills.”

Andreas Schleicher, Director for the Directorate of Education and Skills at the Organization for Economic Co-operation and Development (OECD)

## 2. AN ECLECTIC STUDENT DEMOGRAPHIC

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Over the years, the student population has changed dramatically. Once relatively homogenous, today’s aspiring graduates include a mix of first-generation, foreign and older students who bring distinctive cultural backgrounds and needs.







## An Eclectic Student Demographic

**21%** ↑  
of European universities reported an increase in students from ethnic minority groups in 2015

**29%** ↑  
mentioned increased access by students from socio-economically disadvantaged backgrounds

**29%** ↑  
of institutions noted an increase in mature students

According to a study conducted by the European University Association entitled “Trends 2015: Learning and Teaching in European Universities,” 21 percent of European universities reported an increase in students from ethnic minority groups in 2015, 29 percent mentioned increased access by students from socio-economically disadvantaged backgrounds, and 29 percent of institutions noted an increase in mature students. Preparing this varied demographic for a complex world requires catering to a diverse range of learner interests and needs that serve the whole student far beyond the academic curriculum.

## 3. GLOBAL PERSPECTIVE

As the number of people exposed to higher education grows and technology makes information more easily accessible, on some levels the world seems smaller. Technology knows few borders, but an interconnected world can be used to amplify differences and sow discord. Universities are well placed as environments where students learn how to contribute to and derive value from intercultural and intergenerational diversity.

By shaping a broad appreciation for diversity in work and life in general, education prepares students for interconnected futures and builds a workforce of “globally competent individuals,” according to a report from the OECD Programme for International Student Assessment (OECD PISA)—“Preparing Our Youth for an Inclusive and Sustainable World.” The report goes on to say these individuals should be able to “examine local, global and intercultural issues, understand and appreciate different perspectives and world views, interact successfully and respectfully with others, and take responsible action toward



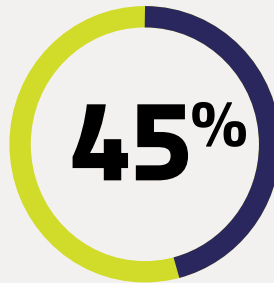
sustainability and collective well-being.” How well placed are today’s students to live up to this?

#### 4. INCREASED ACADEMIC AND SOCIAL PRESSURE

In a recent survey by the American College Health Association, 52 percent of students reported feeling “hopeless,” while 45 percent experienced higher than average stress within the past 12 months.

“College students are much more overwhelmed, much more stressed, much more anxious, and much more depressed than they’ve ever been,” says Professor Laurie Santos, a psychology expert and professor at Yale University, in a recent interview with New York Times Magazine. “I think we really have a crisis writ large at colleges in how students are doing in terms of self-care and mental health.”

From courses to services, universities are developing their nurturing dimension further to support student mental health and emotional well-being.



of students experienced higher than average stress within the past 12 months



of students reported feeling “hopeless”

# Taking action

How can universities ensure students have the skills and support required to navigate today's challenging academic and workplace environments?

## ENCOURAGE POSITIVE MENTAL HEALTH BEHAVIORS

A 2013 report on mental health by the Yale College Council found that more than half of undergraduates sought mental health care from the university during their time there. No wonder more than 1,200 Yale University undergraduates enrolled in a voluntary course entitled "Psychology and the Good Life" within days of registration, as reported by David Shimer in a New York Times article.

The course explores what makes people happy and how to put those strategies into place and build better habits.

"If we see good habits, things like students showing more gratitude, procrastinating less, increasing social connections, we're actually seeding change in the school's culture."

Professor Laurie Santos, Professor of Psychology at Yale University

more than **50%**

of Yale undergraduates sought mental health care from the university during their time there.



## PROVIDE WHOLE STUDENT SUPPORT

University faculty are well placed to play a pivotal role in developing balanced, culturally astute graduates by understanding the value of student well-being while maintaining an environment that's conducive to free thought, open communication and diverse opinions.

**“Universities need to know it’s okay to be both academically demanding and emotionally supportive”**

Andreas Schleicher, Director for the Directorate of Education and Skills at the OECD

One way of accomplishing this is by granting educators access to professional development resources that will help them adapt their teaching methods, classrooms and campuses. Instruction may range from coaching faculty on how to create personalized experiences for students to offering social support that “makes students feel at home, gives them a sense of belonging and ownership,” says Schleicher. “This is achieved not by lowering academic demand, but by increasing social support, academic support.”

Academic advisors can also offer support to first-generation students and others who may be less prepared for the rigors and challenges of academia. Increasing staffing, programs, and

initiatives to address the rise of anxiety should help to ensure the success of students who need more support than ever before.

## DELIVER REAL-WORLD LEARNING

To make sure higher education remains meaningful, Schleicher suggests that students need to understand how the studies they’re pursuing can be applied in the real world. He says the learning experience is about co-creation; by involving students in the study design process, providing a range of research opportunities, and offering better integration with real-world projects, universities can better prepare students for what is to come.

Many universities are now referring to students as “participants” and engaging them in activities that take them outside the classroom. Visiting a refugee camp to learn about human rights crises, meeting with government officials to address smart city recommendations, participating in startup incubator programs—they can all promote a deeper understanding of world issues.

Since its inception a few years ago, Georgia Tech’s CREATE-X—an umbrella of entrepreneurial support programs catered specifically for Georgia Tech undergraduates—has yielded 81 startups from students across its six academic divisions, according to David Gernon, a tech reporter for CNBC. These startups include companies like Autohub, an app for car enthusiasts, and Lightbikes, makers of futuristic electric bikes.



## BUILT FOR THE FUTURE

Universities are expanding the scope of education far beyond the academic focus to prepare students for jobs that haven't been created yet, and futures that appear more uncertain than for previous generations.

*“They’re building a learning agency, building strength and curiosity.”*

Andreas Schleicher, Director for the Directorate of Education and Skills at the OECD

With these attributes, students can not only manage academic and social pressures through extracurricular personal growth experiences and an emotionally supportive campus environment, but also thrive in a rapidly changing world for many years to come.





## **TREND 2**

# **FIRST AND FOREMOST — ENGAGING THE GROWING NUMBER OF FIRST- GENERATION STUDENTS**

### **THE RISE OF A NEW STUDENT SEGMENT**

For the first time ever, middle income families, “the middle class,” will form the majority of the global population by 2020, according to The Brookings Institution. With this development, a significant student segment is fast expanding: the first-generation university student. These students come from all over the world: By 2020, China alone will have over 37 million students in higher education and India will have over 27 million, reports The Higher Education Policy Institute in a paper entitled “Major Shifts in Global Higher Education: A perspective from Asia.” Latin America, the Caribbean, East Asia, the Pacific, Sub-Saharan Africa, and South and West Asia are also experiencing rapid student population growth, according to The Research Base (an international research consultancy based in London and Brighton, UK).

These first-generation university students should go on to spur economic growth with their higher education, but they also provide universities with a unique opportunity to cater to a growing and vital demographic with an immersive environment and engaging support services.

# The challenges of being first



First-generation university students face particular challenges. In an article in *The Washington Post*, Dr. Linda Banks-Santilli, Associate Dean at Boston University Wheelock College of Education and Human Development, writes that of the 20 percent of 7.3 million college and university undergraduates in the United States who are first-generation, “about 50 percent...are low-income. These students are also more likely to be a member of a racial or ethnic minority group.” In addition to socio-economic obstacles, Dr. Banks-Santilli says many can suffer from “breakaway guilt”—the result of leaving their families behind to pursue a college or university degree. In their article, “First-Generation Students and Their Struggle to Succeed,” Dr. Banks-Santilli and Professor Eleonora Villegas-Reimers, Chair of the Department of Special and Elementary Education at Boston University, list a number of other challenges, including more time spent in employment and less time engaging in extracurricular activities on campus than their non-first-generation peers.

Dr. Amy Baldwin, author of “The First-Generation College Experience,” outlines four key areas where first-generation students are most likely to struggle:

**1**

**Poor knowledge of the college environment**

**2**

**A lack of social capital**

**3**

**A unique family structure**

**4**

**Prohibitive costs**

## 1. POOR KNOWLEDGE OF THE COLLEGE ENVIRONMENT

With limited insight into the innerworkings of academia, first-generation university students often struggle to understand the roles and expectations of students and faculty. In addition, many find themselves ill-prepared to meet academic performance expectations, such as note-taking and writing, especially without university or secondary education-level support at home.

## 2. A LACK OF SOCIAL CAPITAL

The right connections can help students secure internships and sought-after job positions. Unfortunately, first-generation university students often lack such social capital, which can limit their long-term employment opportunities. This is particularly true of international students. In a *Journal of International Students* article, “The Development of Social Capital Through International Students’ Involvement in Campus Organizations,” authors Chris Glass and Peggy Gesing note that “students who participated in campus organizations

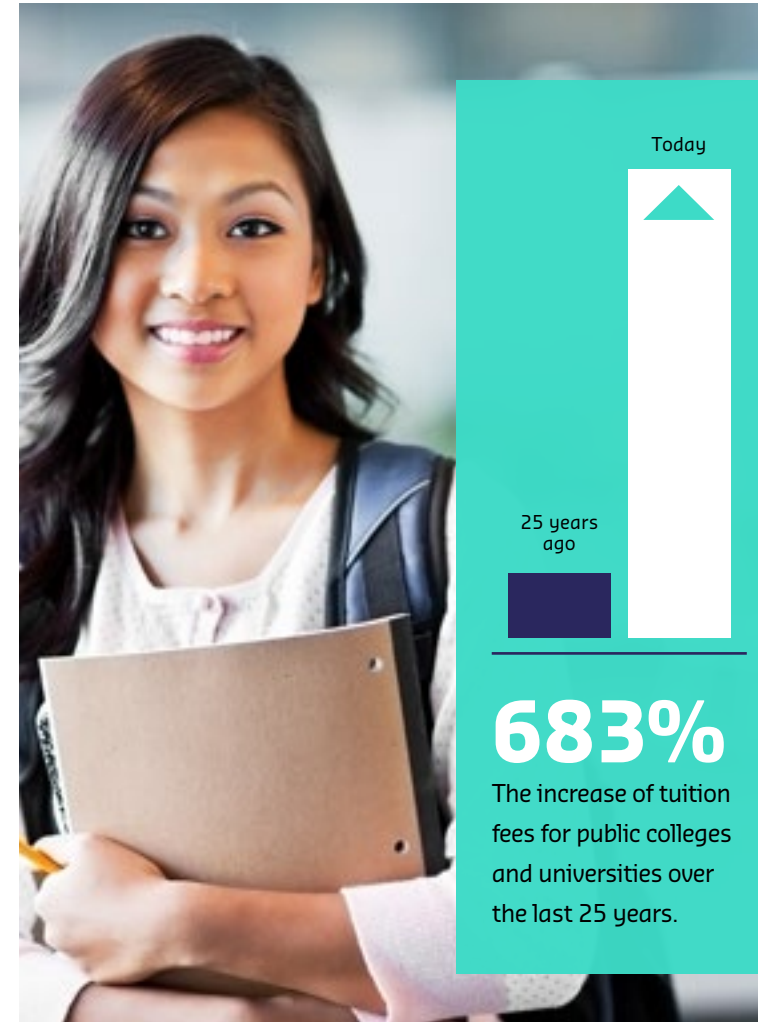
related to their own cultural heritage had networks built of friends from all cultures, creating a greater sense of belonging and attachment to the university.”

## 3. A UNIQUE FAMILY STRUCTURE

Experts indicate that first-generation parents provide different kinds of support than their second- and third-generation counterparts. These cultural differences can result in first-generation university students receiving less environmental and situational guidance to address issues such as poor grades, missed deadlines or exam retakes.

## 4. PROHIBITIVE COSTS

According to Dr. Banks-Santilli and Professor Villegas-Reimers, over the last 25 years tuition fees have increased 587 percent for private colleges and universities, and 683 percent for public ones. The cost of room and board has also risen more than 60 percent. The result is a hefty price tag, especially for first-generation university students, many of whom come from lower-income families.





# Strategies for success

Despite these considerable obstacles, first-generation students bring a wide array of strengths to the university experience. Many are highly motivated, extremely resourceful, appreciative of assistance and resilient in the face of adversity—attributes that make for educational success. They are also key contributors to family and extended communities. “Studies show that a vast majority of first-generation college students go to college in order to help their families,” say Dr. Banks-Santilli and Professor Villegas-Reimers. According to them, 69 percent of first-generation college students say they want to help their families, and 61 percent of them want to “give back” to their communities, compared to 39 percent and 43 percent respectively for non-first-generation students.

By understanding the unique needs—and strengths—of first-generation university students, universities can begin to tap into this potential and build a more diverse student body.

“First-generation college students need customized attention and support that differs from students whose parents have earned a degree. They need to feel like they belong at their college or university and deserve to be there.”

Dr. Banks-Santilli, Associate Dean at Boston University Wheelock College of Education and Human Development, and Professor Villegas-Reimers, Chair of the Department of Special and Elementary Education at Boston University



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**39% & 43%**  
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students

Experts recommend a number of ways to address the challenges facing first-generation university students. These include:

## PROVIDING LIKE-MINDED SUPPORT

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Support services such as onboarding and mentorship—where students are matched with faculty advisors who are former first-generation students—go a long way to helping them make the transition.

David Beard, Associate Professor of Rhetoric, Scientific and Technical Communication at the University of Minnesota, Duluth, was the first in his family to go to college, and he now mentors first-generation students. “I’m not so much a role model,” he says, “as a validation of who they are.”

## RAISING AWARENESS

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Training sessions and seminars for faculty on the challenges facing first-generation university students help them to craft classes that are inclusive and address real-world engagement.

Dr. Banks-Santilli suggests offering compulsory courses in a variety of different formats (hybrid, online, face-to-face) and timings (between semesters, during summers) to help first-generation students reduce degree completion time and save money. Providing less costly alternatives, workarounds or funding for expensive course materials can also offset the incremental costs associated with higher education.

## NETWORKING PROGRAMS

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Fostering meaningful relationships with other students, staff and mentors can help first-generation students build a powerful support network. Many universities now offer international student ambassadors for prospective students. According to a US News article, “3 Benefits of International Student Ambassadors,” “Programs vary at global universities, but through social media, university websites, Skype and other forms of communication, prospective international students can request to connect with ambassadors or even reach out to them directly while researching schools—and then receive support through admission and arrival on campus.” The university will often even send a cadre to the foreign school to meet the inbound students and do orientations “on their turf.”

## MAKING INFORMATION ACCESSIBLE

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Customizing attention and support, particularly in the digital space, makes students feel that they belong in a higher education program and deserve to be there. For example, the Carolina Firsts Program at the University of North Carolina at Chapel Hill—where 18.6 percent of incoming freshmen are first-generation—has a dedicated website that offers a wealth of resources for first-generation students and their families, as well as the faculty who support them. From financial aid to academic coaching and self-improvement workshops, students can select the self-guided or in-person resources they need. Similar programs are showing success at other universities by connecting with first-generation students before they even arrive on campus.



# GOOD FOR ONE, GOOD FOR ALL

First-generation university students aren't the only ones to benefit from better support services, mentorship programs and career planning initiatives: "Anything you do for first-generation students benefits all students," says Dr. Baldwin. "We see improvements across the board." That's because these strategies support a large, cross-cultural and cross-experience student population. After all, the more equipped a first-generation university student is to navigate financial aid processes, partner with mentors, connect with campus support services and collaborate with fellow students, the stronger the collective student body. The result is a ripple effect that not only spans campus, but also generations.

"When you graduate a first-generation student, you change not only that student's life; you change their generation, their family's life."

Dr. Baldwin, Director of Department of Student Transitions at University of Arkansas





## **TREND 3**

# **CONNECTED, ENABLED AND PERSONALIZED — HOW TECHNOLOGY CAN ENHANCE STUDENT EXPERIENCES**

Today, many undergraduate university students are digital natives. Familiar with navigating a variety of digital platforms on various devices and tools, they expect easy access to platforms and emerging technologies to enhance their experience at university. A staggering one billion more digital-native post-millennial students will emerge worldwide over the next 20 years, predicts IBIS Capital, a global research firm, in its Ed Tech Global 2016 Report. At the same time, lifelong learning needs are rising and bringing different generations to university together. In response, academic institutions are looking for new ways to deliver the most enriching digital student experiences.

Universities today are looking to facilitate remote connections between students for access to real-time information both on and off campus. With remote learning on the rise, technology can help universities deliver an increasingly personalized experience to students anywhere—as if they were on campus—that speaks to their specific needs and preferences. There can be surprising results; for example, a study conducted by Jobs for the Future (JFF)—a US-based non-profit that drives change in the American workforce and education systems—and Persistence Plus, an organization focused on retention in higher education, revealed that community college students in STEM fields who received personalized text message “nudges” to keep them on track stayed in school at a rate 10 percentage points higher than those who did not receive nudges.

# Digitalizing the student journey

“Digital is here and it’s here to stay,” according to a PwC report entitled “The 2018 Digital University.” “This disruption is impacting and changing Higher Education and academia and the change is set to continue.” To accommodate this shift in landscape, universities must learn to leverage technology to enrich the student experience throughout their entire journey. This lifecycle consists of three main stages:

## 1. STUDENT PRE-ARRIVAL

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Universities can engage students before they even step on campus. For instance, virtual reality (VR) technology can provide an immersive, 360-degree experience of student life. Prospective domestic and foreign students can follow the same route as an in-person walking tour of a campus, or create a personalized pathway. By offering a digitally explorable environment, universities can supplement the all-important in-person experience and allow prospective students to weigh their options without the cost or inconvenience of distant open-day travel.

Virtual reality can also deliver bottom-line benefits: according to a case study conducted by UForis VR,

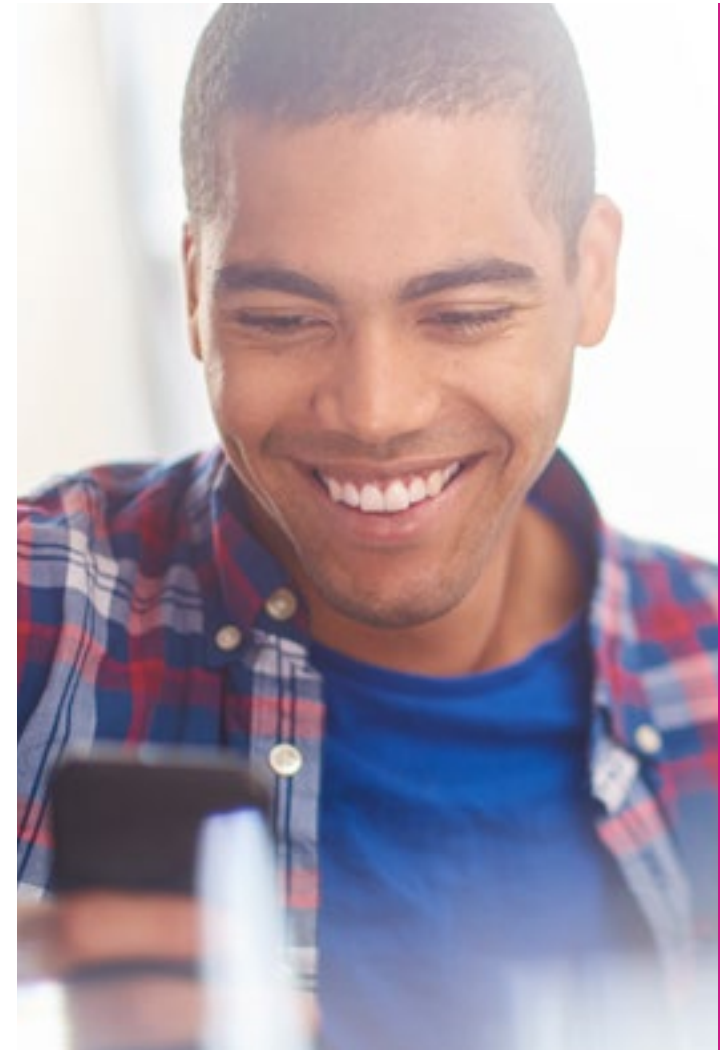
which works with Domus Student Housing in the US, the units equipped with VR tours experienced a 20% increase in year-over-year monthly number of units rented in buildings on campus.

Other digital applications—from roommate matching to seeking financial aid, reviewing professors and finding mentors—all contribute to the pre-enrollment experience and can influence the decisions of a digitally sophisticated audience.

## 2. UNIVERSITY IN SESSION

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With nearly 98 percent of millennials aged 18-24 owning smartphones, mobile apps are the perfect vehicle for delivering powerful student experiences to this undergraduate population.





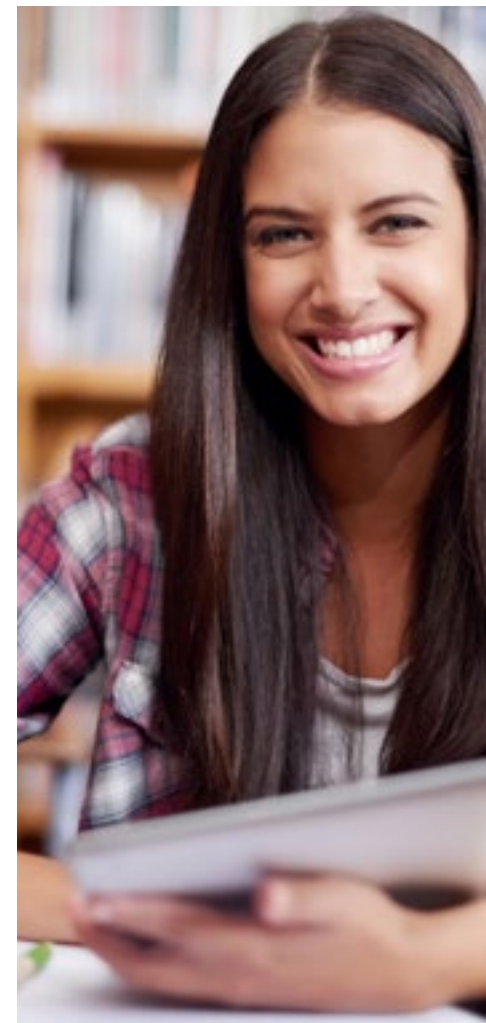
“Smart phones deliver incredibly rich experiences, integrated systems, movements and personalization through detailed data and analytics.”

Tony Sheehan, former Associate Dean of Digital Learning at London Business School

For instance, personalized push notification technology can transmit custom content, from course curriculum to meal plans, straight to a student’s smartphone. As data changes, based on new grades, courses and assignments, so too does the nature and frequency of these notifications.

### 3. POST-UNIVERSITY ACTIVITY

As government funding declines, alumni donations are more important than ever. Yet, according to a benchmarking study from VAESE, a global organization representing alumni professionals in 17 countries, 77 percent of alumni organizations admit they need to update the technology solutions they offer their members, and 87 percent report they “struggle to attract and engage young alumni.” Web-based portals can help by keeping alumni up to date on campus activities and providing them with easy access to membership benefits, like car insurance policies.



# 3 technology trends redefining education



Manufacturers are using artificial intelligence to predict equipment failures, retail workers are relying on mobile apps to up-sell to consumers in real time and corporations are converting cubicles into sensor-connected hubs. With competition for student enrollment mounting, universities are embracing technology to craft a unique experience and win the hearts and minds of prospective students.

Three trends are revolutionizing the student experience through digital technology:

**1**

**Blended learning  
and experiences**

**2**

**Data-driven  
personalization**

**3**

**Connecting on  
students' terms  
and turf**

## 1. BLENDED LEARNING AND EXPERIENCES

Blended learning—a combination of digital media and traditional classroom-led activities—provides students with the freedom to customize their learning experience. For example, the University of Waterloo in Ontario, Canada has replaced many of its pre-lab lectures with online presentations of ocular examination procedures that students perform in the lab. These online modules prepare students for lab work, while online quizzes assess their level of preparedness. Other examples of blended learning include in-class response systems, learning analytics and learning management systems. Game-based learning and gamification are also gaining popularity.

Physical spaces are also being transformed to accommodate digital student experiences. For example, the University of Texas in San Antonio recently opened a completely bookless space in its library. Students can download 425,000 e-books and 18,000 e-journal subscriptions to any one of the facility's terminals or their laptops. The library seats 80 and students can read the same text simultaneously—a significant step up from having to wait your turn.

## 2. DATA-DRIVEN PERSONALIZATION

To deliver highly personalized student experiences, universities must focus on gathering and managing the right data. “It takes really good data to run



**425,000**  
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Available for students to download or subscribe to at the new bookless space in the University of Texas, San Antonio library







big data algorithms, which create student profiles that can be used to create personalization,” says Guillaume Laurie, Senior Instructional Designer at the Kedge Business School, based in France in Marseille, Bordeaux and Paris. After all, he adds, “Data will be the oil of our business.” One way of leveraging data for personalization is through learning portfolios. Based on data-driven profiles of their campus activities, academic achievements and personal interests, students can build personalized learning portfolios that mix and match courses and enable them to build their own degrees. Rather than sift through a university course catalog, these portfolios shift the power to students to create their own custom experiences around education.

**“Students look for courses to suit them on a much more granular level.”**

*Carla Aerts, Director of Futures at the University College London Institute of Education*

The result, Carla Aerts says, is a “pick-and-mix model where students assemble their own degree or course of study.”

### **3. CONNECTING ON STUDENTS’ TERMS AND TURF**

The student experience extends beyond lecture halls and online learning modules. For this reason, universities are looking to meet students where they are. Social media platforms that allow students to join clubs, seek out roommates and manage interactions can satisfy increasing student demands for customer-centric service. For example, Yale University offers a website listing service that connects Yale students to those seeking a roommate or a place to live. Electronic badges can offer students instant access to facilities, from the local gym to medical laboratories. In addition, digital behaviors are influencing the configuration and use of physical spaces. For example, the Esports Arena at University of Hawai’i houses a 3,000 square-foot gaming facility, built for the 67 percent of college-age students who regularly play video games.

## A LOOK AHEAD

The demand for more tech-enabled and personalized experiences is on the rise. Universities are already building a strong foundation with mobile apps, innovative spaces, and personalized interactions. We can expect these efforts to continue playing a prominent role as universities extend digital thinking throughout a student's lifecycle—from pre-arrival to post-graduation—to gain a distinct competitive edge.





# **TREND 4**

## **A FUNDAMENTAL SHIFT — THE NEXT EVOLUTION OF BRICK-AND-MORTAR UNIVERSITIES**

### **THE EVOLVING UNIVERSITY LANDSCAPE**

The traditional model of academic institutions continues to shift. Just as today's employees can collaborate anytime, anywhere, on any device, universities are also evolving to provide students with a variety of spaces and formats for gathering and learning.

Investment in technological progress continues to enhance the student experience through sophisticated digital platforms, but the physical campus remains a key differentiator for universities looking to attract and retain the best students and faculty.

Beyond the central role it plays for students and faculty, the university campus is also an increasingly invaluable local and global community resource, providing an open knowledge hub that facilitates the exchange of ideas across disciplines, backgrounds and generations.

### **A BLENDED APPROACH TO EDUCATIONAL EXCELLENCE**

The Digital Learning Compass organization reports that more than 6 million higher-education students in the US are taking at least one distance education course. Today, over 500 European institutions provide online short courses and distance learning degree programs, according to StudyPortals, an international learning platform. To accommodate this shift, Ken

Steele, President and Chief Futurist at Eduvation, an organization whose mission is to report and support innovation in higher education, says that universities are enhancing the campus experience and maintaining a real sense of belonging among their students and faculty with a blend of digital and face-to-face learning.

For example, the University of Pennsylvania, Columbia University and the Massachusetts Institute of Technology all offer MicroMasters, an online degree for learners anywhere in the world. Students who earn a MicroMasters credential can then apply for an accelerated, campus-based, master's degree program at top universities.

Interestingly, for many students the connection to 'place' is still a critical part of their university experience. According to findings from the Sodexo International University Lifestyle Survey 2017, nearly half—43 percent—of students in the US make their decision on where to attend college based largely on their first impression of the physical campus environment. Universities still need to focus on crafting a friendly atmosphere on their campus,



**43%**

of US students make their university decision based largely on their **first impression of the physical campus** environment.

as 83 percent of US students believe it is more important than a university's reputation. In addition, an expanding higher education marketplace and digital innovation are providing students with greater flexibility and more choice than ever before, turning them into active consumers and influencers of change.

*"Students are becoming more demanding; they're behaving more like customers, questioning old processes and demanding new services."*

Minh Huy Lai, Managing Director, MBA Program at INSEAD

As a result, universities must continue to develop a consumer-centric approach to address students' evolving expectations in a globalized higher education market. The campus of the future is a place for collaboration and creativity, but it must also provide spaces to disconnect. With growing concerns for mental health, universities must make resources available on campus for times of need.



**83%**

of students believe that a **friendly campus atmosphere** is more important than a university's reputation.





# What does it take to create the campus of the future?



How are universities rethinking their campus as a sustainable hub of creativity and knowledge with an active role in advancing quality of life for the community?

**1**

**Rethink existing physical spaces to facilitate greater collaboration and interaction**

**2**

**Renew engagement with local communities**

**3**

**Provide more inter-campus flexibility to support student mobility**

**4**

**Develop emotional connections with students**

## 1. RETHINK EXISTING PHYSICAL SPACES TO FACILITATE GREATER COLLABORATION AND INTERACTION

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A range of behaviors make up student learning, including informal collaboration, socialization and individual focus, as well as formal learning in a classroom. As the environment influences thinking, universities are increasingly providing an array of flexible study spaces to allow students to exchange ideas, engage in creative thinking, pool resources and collaborate on common projects.

As paper volumes give way to digital files, Ken Steele, President and Chief Futurist at Eduvation, says universities are converting library spaces to include dedicated areas of activity, from student services centers and learning commons to meeting rooms and digital resource labs. In addition, active learning classrooms, where students can move and rearrange their seating, help them focus and stay attentive.

There is also an increased fluidity between accommodation and learning spaces, as student suites include collaboration areas to accommodate shared learning within the living community.

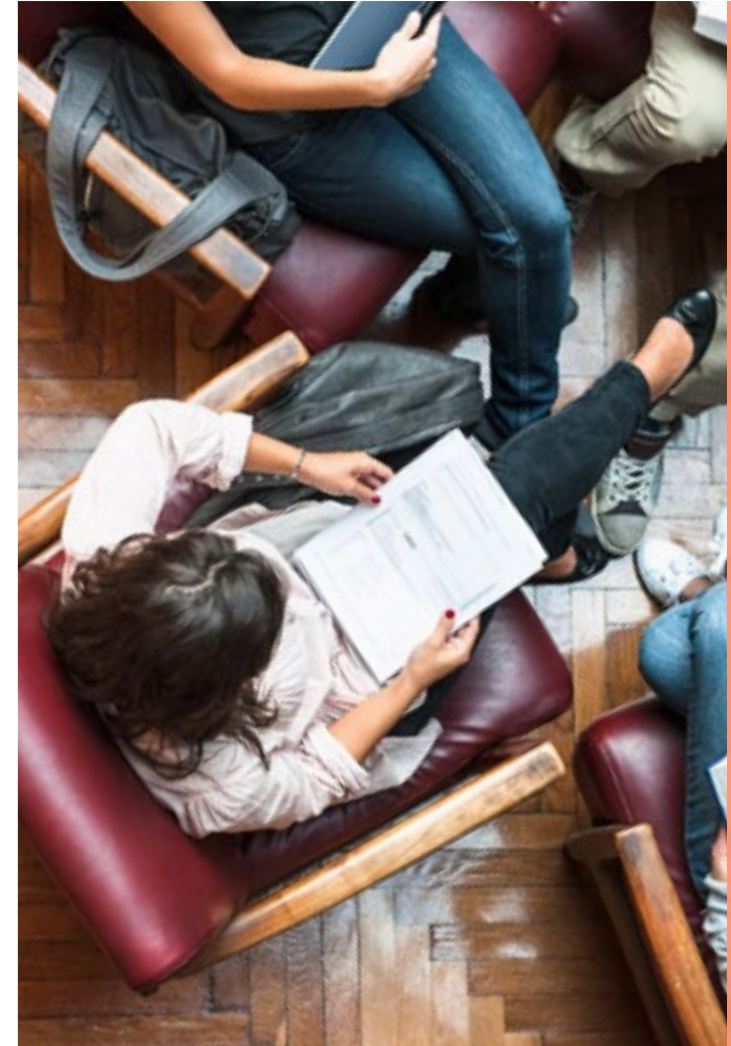
On the other hand, universities increasingly understand the importance of enabling students to screen out distractions. As a result, silent rooms and meditation spaces are being introduced as part of a balanced campus to help students disconnect from the hustle and bustle of student life.

“What’s interesting is that as learning becomes more virtual, the virtual activities are actually becoming more physical. You might say the virtual and the physical are meeting in the middle,” says Andrew Kim, a manager in Steelcase’s WorkSpace Futures group.

## 2. RENEW ENGAGEMENT WITH LOCAL COMMUNITIES

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To shrug off “town and gown” frictions for good, universities are finding new ways to engage with





their neighbors, businesses, NGOs and public-sector organizations. From on-campus senior living to industry-leading science parks, the campus of the future is emerging as an ecosystem of overlapping interests whose students engage in local organizations with positive social impact.

**“The relationship between campus and local environment is changing to welcome the public in more ways today.”**

Alexi Marmot, Professor of Facility and Environment Management at UCL Bartlett Global Centre for Learning Environments

With social and environmental sustainability challenges firmly on cities’ agendas, the campus of the future also provides a unifying platform to generate innovative solutions, test and put them into practice.

### 3. PROVIDE MORE INTER-CAMPUS FLEXIBILITY TO SUPPORT STUDENT MOBILITY

As competition mounts for international students, universities are providing more inter-campus flexibility to support student mobility.

In the case of INSEAD, the campus is split over three locations—Singapore, Abu Dhabi and Fontainebleau, France. Students can study at any of these three campuses with identical core courses, fully transferable credits and a similar campus experience.

**More than three-quarters—77%—of INSEAD’s students spend their time across the three different locations.**



Beyond ensuring consistency in its signature look and feel across the three campuses, INSEAD is changing its physical infrastructure to include large, open co-working spaces that cater better to modern students' study needs and satisfy their service expectations with meal programs, IT assistance and gym access.

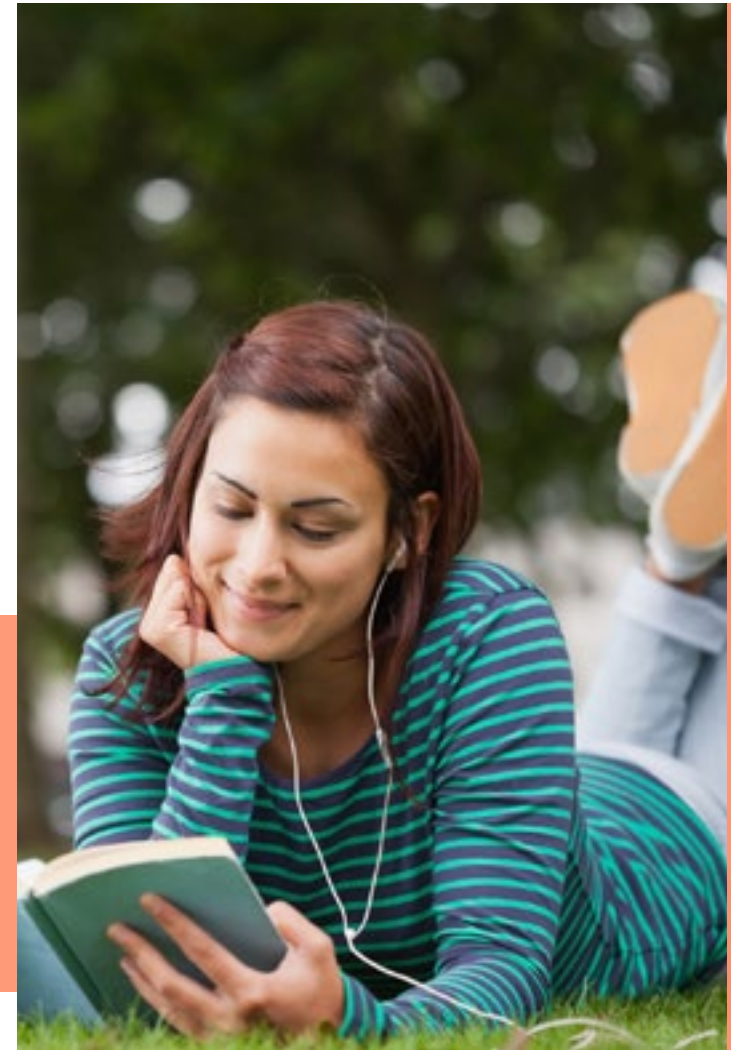
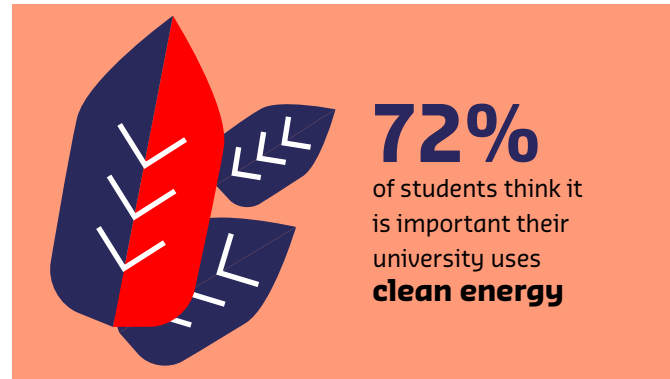
To ensure remote learners can also benefit from aspects of campus life, inter-university shared social and sporting facilities would allow these students to connect with peers from other institutions as part of a richer student experience.

#### 4. DEVELOP EMOTIONAL CONNECTIONS WITH STUDENTS

Despite much commentary on the consumerization of higher education and universities as service providers, campuses embrace the importance of nurturing students' emotional attachment and loyalty. They do this by purposefully shaping a student campus experience based on the dimensions

of quality of life that students value most, creating a personalized education experience and supporting the mental and emotional health of students.

One way universities can nurture an emotional connection with students is by reflecting their priorities. For example, the Sodexo International University Lifestyle Survey 2017 revealed that 72 percent of students think it is important their university uses clean energy. Measures to reduce the impact of campus facilities on surroundings include the Green Campus Initiative of the Asian Institute of Technology in Bangkok, Thailand, which has created botanical gardens, uses biomass energy and has a wastewater treatment system.







# LOOKING FORWARD

Universities are under unprecedented pressure to attract and retain students and faculty across a wide spectrum of programs. Creating a thriving, sustainable campus requires embracing a blended model that articulates and promotes the values of place and belonging with high quality services. By carefully considering the trends shaping how students learn and live, universities can better plan for, fund and create campuses of the future.





## **TREND 5**

# **LIFELONG LEARNING — ADAPTING AND EVOLVING TO ACCOMMODATE A MULTI- GENERATIONAL STUDENT BODY**

### **A new student body**

Worldwide, we are enjoying longer, healthier lives than past generations. In fact, the average global life expectancy has increased from 53 years in 1960 to 72 years in 2015 and this increase is set to continue, according to The World Bank. Our longer, healthier lives are having a direct impact on the world of work, which in turn is affecting the way we acquire and develop knowledge throughout our lives. At the same time, we are in the early stages of a fourth industrial revolution, driven by unprecedented development in new technologies which is disrupting many aspects of our lives, societies and business models. As the search for talent is increasingly global, we need to be more agile in terms of retraining for multiple career shifts throughout our longer lives. Whether returning to study in retirement or seeking continuous education as workplace requirements shift, the student population includes greater age diversity.

These disruptive changes are forcing academic institutions around the world to adapt to the needs of an evolving student body for whom lifelong learning programs will be key to remaining relevant and employable in the digital age.



# The reinvention of the learning model

While traditional two-to-four-year university experiences remain relevant, they are now complemented by a variety of shorter, more accessible courses that provide updates or introductions to wholly new subjects and innovative curricula.

According to Frederick Hess, Resident Scholar and Director of Education Policy Studies at the American Enterprise Institute, “The most significant shift [for US institutions] is probably the massive growth in the adult student population in higher education.” As reported by the US National Center for Education Statistics, students over 30 years of age accounted for 39.8 percent of the total number of enrolled students in 2015. These students face entirely different personal and work commitments and have to manage their time effectively.

## THE FOURTH INDUSTRIAL REVOLUTION

Throughout our human history, technological progress has always led to changes in relation to what work is done, by whom it is done and how it is done. As we approach the third decade of the 21st century, we expect to see more significant workforce developments than ever before, driven by continued progress in the fields of data, artificial

intelligence, augmented reality, machine learning and intelligent robotics. Indeed, new types of jobs will be created, existing types of jobs are expected to be lost and many will change. Simon Nelson, CEO of FutureLearn, a social learning platform company, says, “Think about all the jobs that don’t even exist yet that could be potentially core to the [labor force] landscape.” As mechanization and intelligence merge, human creativity and imagination will be increasingly critical skills to nurture in the digital age. Many recognize the

Students over 30 years of age accounted for **39.8 percent** of the total number of enrolled students in 2015





need for an agile approach to learning to ensure employability: when asked how they would use FutureLearn courses, 72 percent of learners said “to learn new skills,” and the second highest response was “for continued professional development.”

## A NEED FOR SOFT SKILLS

As outlined by a 2017 McKinsey Quarterly article, “Putting Lifelong Learning on the CEO Agenda,” “When we talk about learning, the emphasis is often on ‘hard’ skills, such as coding, analytics and data science. While these skills will be critical, they are only part of the story.” Developing soft skills as part of their lifelong learning will be critical in preparing workers for a changing landscape. Indeed, cultivating soft attributes such as “collaboration, empathy and meaning-making” will be critical to success.

“Emotional intelligence (EI) has become a core skill set for high-performing organizations and outstanding leaders today.”

2018 Sodexo Global Workplace Trends Report

With increasingly flat hierarchies across organizations and increasingly diverse teams in terms of cultures, generations and training backgrounds, employees need the necessary soft skills to navigate cross-cultural projects and support effective teamwork, and also to derive meaning and a sense of purpose from their working life.



When asked how students would use FutureLearn courses,

**72%** said:

✓ **“To learn new skills.”**

**2nd** highest response:

✓ **“For continued professional development.”**



# Capitalizing on positive change



“There’s unlimited demand in the developed and developing worlds for increasingly sophisticated adult learning that’s flexible,” says Simon Nelson, CEO of FutureLearn. In response to the ever-increasing demand for workers to expand and grow their skills to stay competitive in a challenging marketplace, academic institutions have a unique opportunity to connect, serve and inspire learners.

**1**

**Partner up  
for success**

**2**

**Make education  
bite-size**

**3**

**Facilitate a  
cultural shift**

## 1. PARTNER UP FOR SUCCESS

One approach is for universities to form public-private partnerships such as Mirabella at Arizona State University in the US, a university-based retirement community set to be completed in 2020 that features a 20-story senior living facility with 252 independent-living apartments. Mirabella at ASU will connect the university community to its residents, who will be able to take classes, access the library and participate in campus-based cultural activities for lifelong learning. This kind of senior living facility is seen as a way for universities to tap into a new revenue source, monetize unused land and satisfy the expectation that universities should “serve the community” and be “of place, space and access” to provide enriching experiences, according to Sir Alan Tuckett, Professor of Education at the University of Wolverhampton in the UK.

## 2. MAKE EDUCATION BITE-SIZE

Microcredentials and badges are another way for individuals to create their own modular learning programs rather than rely on longer certificates,

diplomas or degrees. The University Learning Store, a partnership of seven prestigious US universities, offers online, on-demand, skills-focused courses and credentials that meet the needs of employees and employers. Similarly, massive open online courses (MOOCs) allow individuals to improve their professional skills in their own time and at their own pace.

“Since they came on the learning scene in 2008, MOOCs have gradually shifted toward offering content that is relevant to the world of work. Course topics range from machine learning and Java programming to communication and leadership.”

Monika Hamori, Professor of Human Resource Management at Madrid’s IE Business School





### 3. FACILITATE A CULTURAL SHIFT

Today, universities understand that organizations are measured not only by profitability but also by the contributions they make to their employees. By offering workers lifelong learning opportunities, they can display a real commitment to professional growth that goes beyond the bottom line.

“The willingness of not just workers, but employers, to embrace the shift toward renewable learning will impact our ability to address the most pressing challenges facing the workforce today—from skills gaps to employee diversity to talent retention. Renewable learning is no longer a nice-to-have, but a need-to-have for employees and employers to succeed in today’s rapidly evolving world of work.”

Jeffrey J. Selingo, author of *There Is Life After College: What Students and Parents Should Know About Navigating School to Prepare for the Jobs of*

*Tomorrow*, and Kevin Simon, Head of Product for LinkedIn Learning

Universities are adapting to this need by partnering with companies and communities to provide flexible and accessible learning options. According to Frederick Hess, Resident Scholar and Director of Education Policy Studies at the American Enterprise Institute, this means rolling start dates for courses (not just in September and January), bringing in practicing professionals to teach certain courses and investing in the appropriate curricula to support working learners.

An article in the *Chronicle of Higher Education*, “Reimagining College as a Lifelong Learning Experience,” talks about how universities are starting to blur the lines between students and alumni, facilitating ongoing access to education: “At Stanford University’s Hasso Plattner Institute of Design, futurists proposed the Open Loop University, where undergraduate study is just the beginning of a long partnership.”

## LOOKING FORWARD

Changes in the world of work driven by rapid demographic and technological change are fueling demand for a more flexible education model and giving rise to new lifelong learning opportunities. For learners, it's a way to gain a competitive edge in a tough labor market. For organizations, it's a chance to display a commitment to employees' professional growth. For universities, lifelong learning is the foundation for a cultural shift in education that embraces all ages, backgrounds and ambitions.





## EXPERTS



**Carla Aerts**, Director of Futures & Deputy Director EDUCATE, UCL Institute of Education



**Dr. Amy Baldwin**, Director, Department of Student Transitions, Univ. Central Arkansas



**Françoise Dany**, Executive Education and Corporate Affairs Director, EMLyon Business School



**Minh Huy Lai**, Managing Director, MBA Programme, INSEAD



**Guillaume Laurie**, Senior Instructional Designer, Kedge Business School



**Dr. Alexi Marmot**, Professor of Facility and Environment Management, UCL



**Simon Nelson**, CEO, FutureLearn Ltd



**Andreas Schleicher**, Director for the Directorate of Education and Skills, OECD



**Tony Sheehan**, Former Associate Dean of London Business School



**Ken Steele**, Higher Ed Strategist, Speaker and Facilitator, President & Chief Futurist, Education Inc.



**Sir Alan Tuckett**, Professor of Education, Univ. of Wolverhampton

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