



THE NEXT GEN LEARNERS REPORT

What the Next Generation
of Learners Wants From
Higher Education

Cost of Living, Vibes, and *Radical Transparency*

CARNEGIE



INTRODUCTION

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ABOUT THE RESEARCH

This research is based on a survey of 3,300 teenagers (ages 13–18) across the United States. The sample includes students who plan to attend college as well as those who do not, providing a broader view of how higher education fits into their thinking.

Roughly half of respondents indicated that college is part of their plan.

Carnegie plans to publish additional analysis and segment-level breakouts to further explore differences across student groups. Stay tuned to Carnegie channels for future reports.

Winning the Next Generation of Learners

For decades, the college decision has been framed as a matter of choice. Students compared institutions based on reputation, programs, and campus experience to decide which college to attend.

That decision making has evolved.

Most of the teens we asked said they still believe in the value of higher education. They see it as important to their future and connected to long-term success. But their path to that decision is no longer quite as straightforward.

More than half of the students we surveyed say they are not currently planning to attend college - BUT they would consider it under the right conditions.

This is not an outright rejection of higher education. It is a shift in expectations.

Students are trying to get the balance right between the cost of higher education and the cost of daily life, between flexibility and structure, between aspiration and practicality. They are evaluating how college fits into their reality today, not just what it promises for the future.

Across the full sample, regardless of intent, students are asking the same question:

Can college work for me?

They are looking for clarity around cost, visibility into outcomes and signals that they will belong, succeed, and be understood. They are making decisions based on what feels possible, not just what feels valuable.

This shift changes the opportunity.

Higher education is no longer competing on preference alone. It is competing on perceived feasibility.

The institutions that win with the next generation will be the ones that make college feel real, personal, and possible by showing how it works, who it works for, and why it is worth it.

Understanding *Why* Students Decide

The findings that follow focus on the students who are currently considering college.

The pool of college-bound students is becoming more constrained, and the competition for their attention is intensifying. Understanding how this group thinks, what they prioritize, and what moves them forward is critical for institutions focused on enrollment.

At the same time, their decision-making reflects broader dynamics shaping the entire market. The same questions about cost, value, and fit are influencing both those who plan to attend and those who remain uncertain.

This report is intended to bring clarity to those dynamics.

Because when institutions better understand how students are thinking, they are better positioned to connect in ways that feel relevant and credible, and drive enrollment.



Student decision-making is becoming more complex—and harder to interpret from the outside.

We wanted to understand it from the inside.

So we asked students directly what matters to them and how they're making decisions. What we heard reflects a changing environment that all of us—institutions, students, and partners—are navigating together.

This is not a story about what institutions are getting wrong. Many of the forces shaping student decision-making sit outside of any one institution's control. In that context, even well-designed strategies can start to feel misaligned with how students are actually experiencing the process.

What remains within reach is understanding. The more clearly we can see how students are thinking, the more effectively we can respond.”



Megan Robinson

Executive Vice President,
Enrollment Services
Carnegie

Key Findings

If you take one thing from this report, this is it! This is the page to print, the takeaways to share at the water cooler.

These are the defining shifts in how students are evaluating college today. We'll unpack each of them in the pages ahead, but this is the foundation, what to know before you go deeper.

1. Interest in College Is Conditional on Feasibility

Students are not rejecting higher ed. They are assessing whether it is financially and practically possible.

2. Cost Is the Dominant Barrier and It's More Than Just Tuition

Students are evaluating whether college is manageable in real time, not just valuable long term.

3. "Vibes" Are a Serious Decision Driver

Students are assessing belonging, safety, and lifestyle alongside academics.

4. Flexibility and Career Outcomes Shape Academic Value

Students expect adaptable programs with clear connections to jobs and outcomes.

5. Authenticity Matters More Than Brand Alone

Reputation opens doors, but trust is built through real, consistent experiences.

6. Marketing Is How Institutions Demonstrate Understanding

Generic messaging is ignored. Relevance and clarity drive engagement.

7. Design for Non-Linear Discovery

Students move across channels—search, social, AI, and email—validating information at every step.

The Next Gen Learner Value Equation

Higher education is experiencing a shift in how students define value:

- Affordability must be clear and realistic
- Experience must feel livable and authentic
- Outcomes must be visible and credible

Students are still motivated to pursue education and they're asking more direct questions about how it can work for their lives today.

REAL, PERSONAL, AND POSSIBLE

Students Are Balancing What Feels Real, Personal, and Possible

From What Matters to Why It Matters

Students are not approaching the college decision with a single priority in mind. They are weighing a set of factors that reflect both their current reality and what they hope to build next.

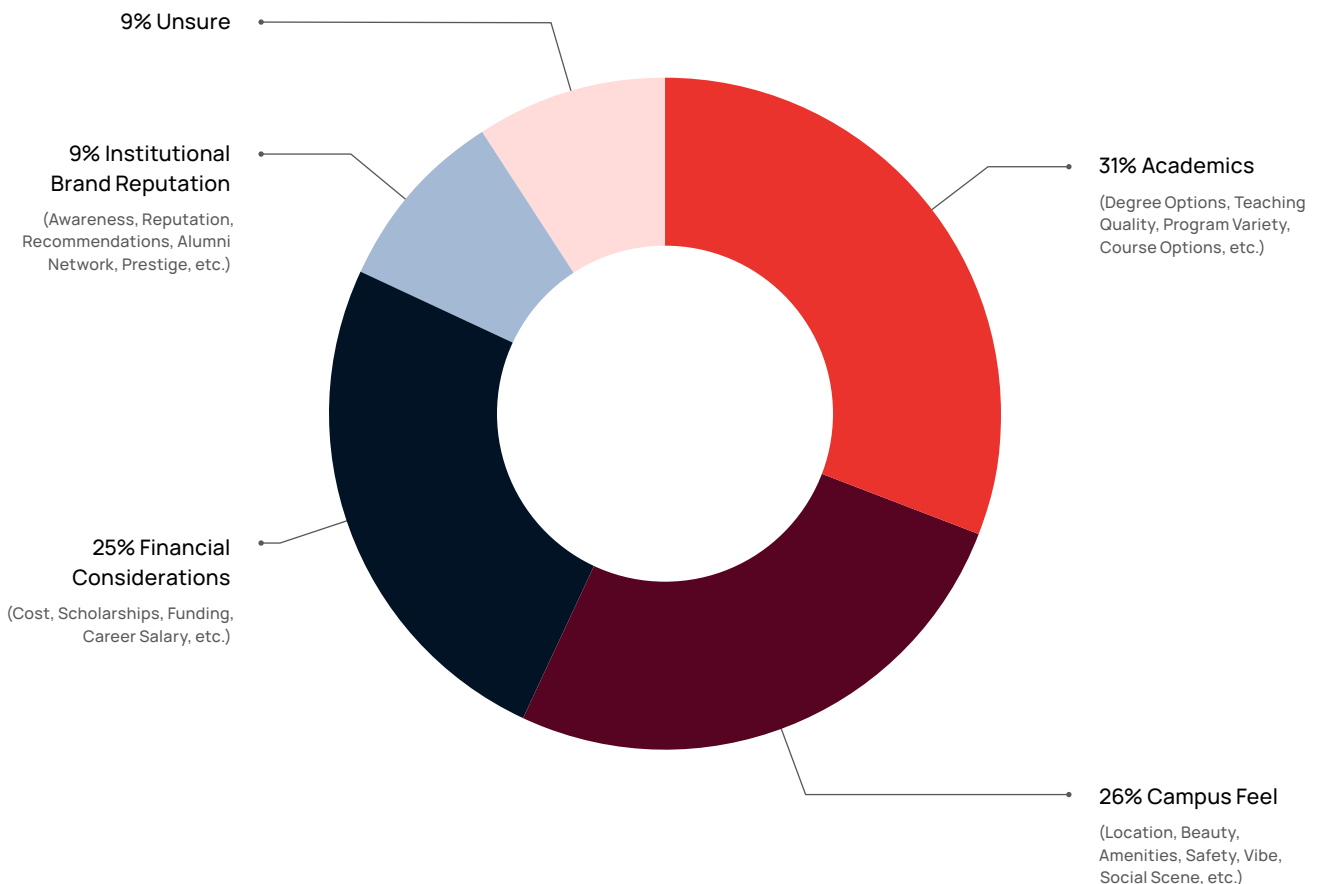
Some of those factors are familiar. Cost, academics, and campus experience continue to shape how students evaluate their options. These have always been part of the decision (we know, because these same factors have come up consistently in our prior research).

These factors are not being evaluated in isolation. Students are considering them together, as part of a single decision about whether college feels possible, worthwhile, and right for them.

The following sections explore *why* students care about these decision-making factors. Giving institutions more information to refine their approach, their language, their emphasis, and where they spend their time and resources.

Most Important Factor

Which of these four factors is most important to you?



Affordability
Outweighs ROI
and the Definition
of Cost Is Changing

COST

The Ability to Afford College Outweighs ROI

Cost is no longer just a factor in choosing where to attend, it is shaping whether college feels possible at all.

Across our research, students consistently prioritize their ability to afford college over the long-term return on investment. In this study, more than three in five students say affordability matters more than ROI.

This reflects a shift in how students are making decisions.

They are not evaluating college in abstract terms. They are assessing whether it works within the realities of their daily lives—what they can manage now, not just what they might gain later.

61%

of teens we surveyed are more focused on their ability to afford college than on return on investment.

Cost Is Now Defined by Daily Life

Students are defining cost more broadly, and more concretely, than ever before.

Tuition is only one part of the equation. Housing, food, transportation, and day-to-day living expenses are playing an even larger role in how students evaluate whether college is feasible.

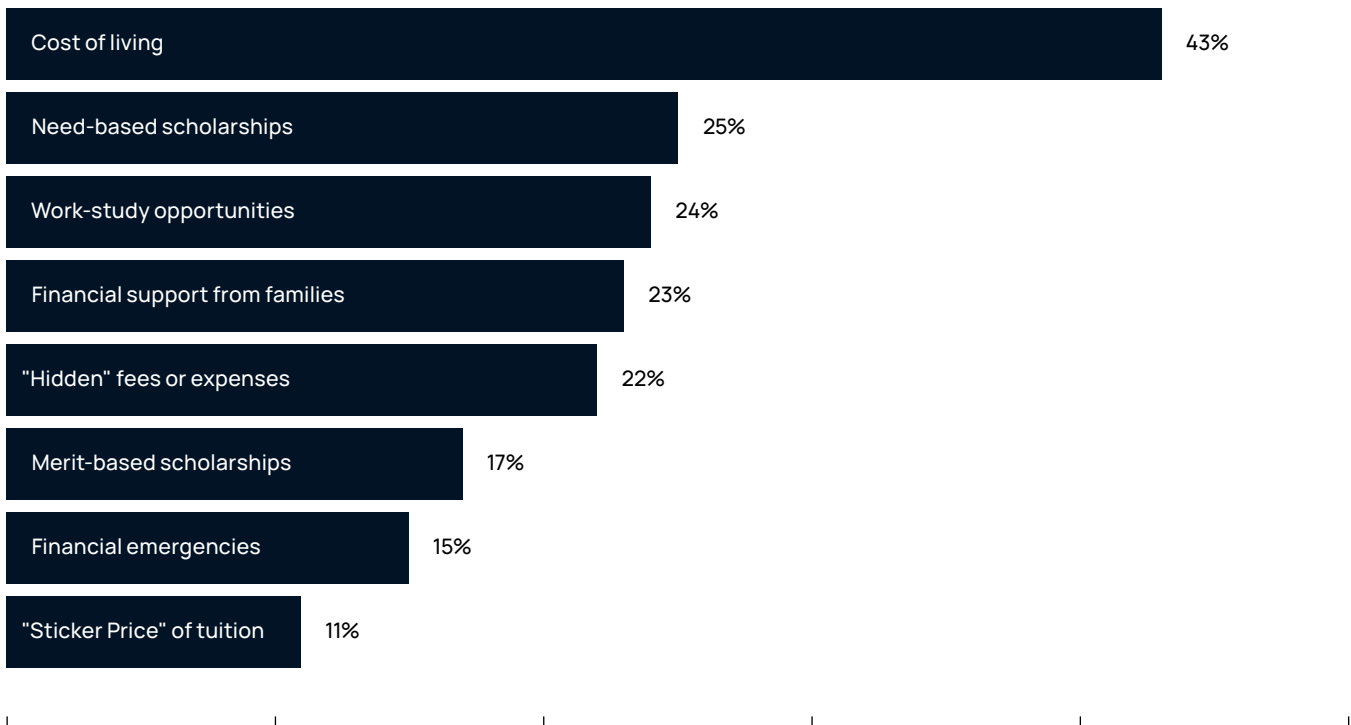
This reflects a more immediate and practical lens.

Students are making decisions based on what they can manage now—how to balance school with work, how to avoid additional debt, and how quickly their investment will translate into stability.

Return on investment still matters. But it is being weighed alongside the realities of daily life, not in isolation.

Financial Considerations (Select Up to 2.)

Which financial considerations are most significant to you?
(Only “More Focused on Ability to Pay” Respondents)



COST

What This Means for Institutions

Students are making college decisions within the context of their everyday lives. Cost is part of that decision in a way that feels immediate and personal.

They are considering how they will pay for housing, food, transportation, and unexpected expenses alongside tuition. They are thinking about whether they can work while enrolled and what tradeoffs that might require. These questions shape whether college feels realistic, not just worthwhile.

That creates a different starting point for engagement.

When cost feels unclear or difficult to navigate, students pause. When it is explained in a way that is straightforward and complete, it helps them move forward with greater confidence.

There is an opportunity to support that momentum. Clear communication about total cost, financial support, and how students actually manage their day-to-day finances can make the decision feel more manageable.

Helping students understand what it looks like to make college work in practice strengthens trust and keeps them moving through the process.

“

Make affordability visible, not abstract.

Students and their families are already doing the math. We see this clearly in eroding yield rates and pressure on many institutions to reduce net cost to remain competitive.

Alongside evaluating their net cost position and gift aid strategies, institutions have an opportunity to meet students in that decision moment with clear, practical information. Show what it actually costs to live and learn. Break down how students and families can put together a realistic financial plan. Make financial support feel real and accessible.

Clarity builds confidence. When students can see a path forward, they are more likely to take the next step.



Michael Keane

SVP, Enrollment Strategy
Carnegie

CAMPUS FEEL

Campus Feel Is Emotional, Social, and Practical

Campus Feel Is Emotional, Social, and Practical

Campus feel is not just a "soft factor." It is often the deciding factor once a school makes the list. Students are using campus feel as a filter for whether a college feels livable and like a realistic next step for them.

Students are not describing campus feel in abstract or superficial terms. They are defining it through lived experience.

In our research, campus feel ranks just behind academics as a top decision driver, with 26% of students identifying it as the most important factor when evaluating a college.

When students talk about campus feel, they are describing something that is deeply emotional and highly practical at the same time.

26%

of students say campus feel is the most important factor in choosing a college.

Students Are Looking for a Place That Feels Like Home

Students consistently describe campus feel in terms of comfort, familiarity, and belonging.

They want to know whether they will feel like themselves in a new environment. They are paying attention to the social dynamics of a campus, the way students interact with one another, and whether they can see a place for themselves within that community.

This sense of belonging often shows up early in the discovery process. Students are forming impressions through images, videos, and stories long before they step foot on campus. Those impressions carry weight. They help students decide whether to continue exploring or move on.

34%

of students say “Day in the Life” content is what they would most likely look for when watching college videos on YouTube—more than any other content type

“

Campus feel means feeling like you're back at home, like a place where you're comfortable at and can be yourself and find a community around you.”

Qualitative response from college-seeking student

“Vibes” and Aesthetics Are a Key Component of Campus Feel

Students often use language like “vibe” to describe what they are looking for, but that feeling is built from specific signals.

They are noticing the aesthetic of the campus, the way spaces are designed, how students present themselves, and how the institution communicates visually and verbally. Small details add up to form a larger perception of what it would be like to be there.

This is something campuses should prioritize.

Students are not looking for a perfectly polished version of campus life. They want to see what it really feels like.

That includes everything from the look and feel of campus spaces to the tone of student interactions and the stories being told. When those signals feel overly produced or inconsistent, it creates distance. When they feel real, even if they are unpolished, they build credibility.



To me, “Campus Feel” means the overall atmosphere and vibe of a college. How welcoming, friendly, and inclusive it feels, how students interact, and whether I can see myself feeling comfortable and motivated there.”

Campus feel is like the aesthetic of the campus. For example, a college with a big and studious library, or a certain design on a railing.”

To me it means the overall vibe of the campus. It could be busy or calm, and I’d prefer a calmer campus.”

*Qualitative response from
college-seeking students*

Safety, Environment, and Practical Considerations Matter

Campus feel also includes practical concerns that shape daily life.

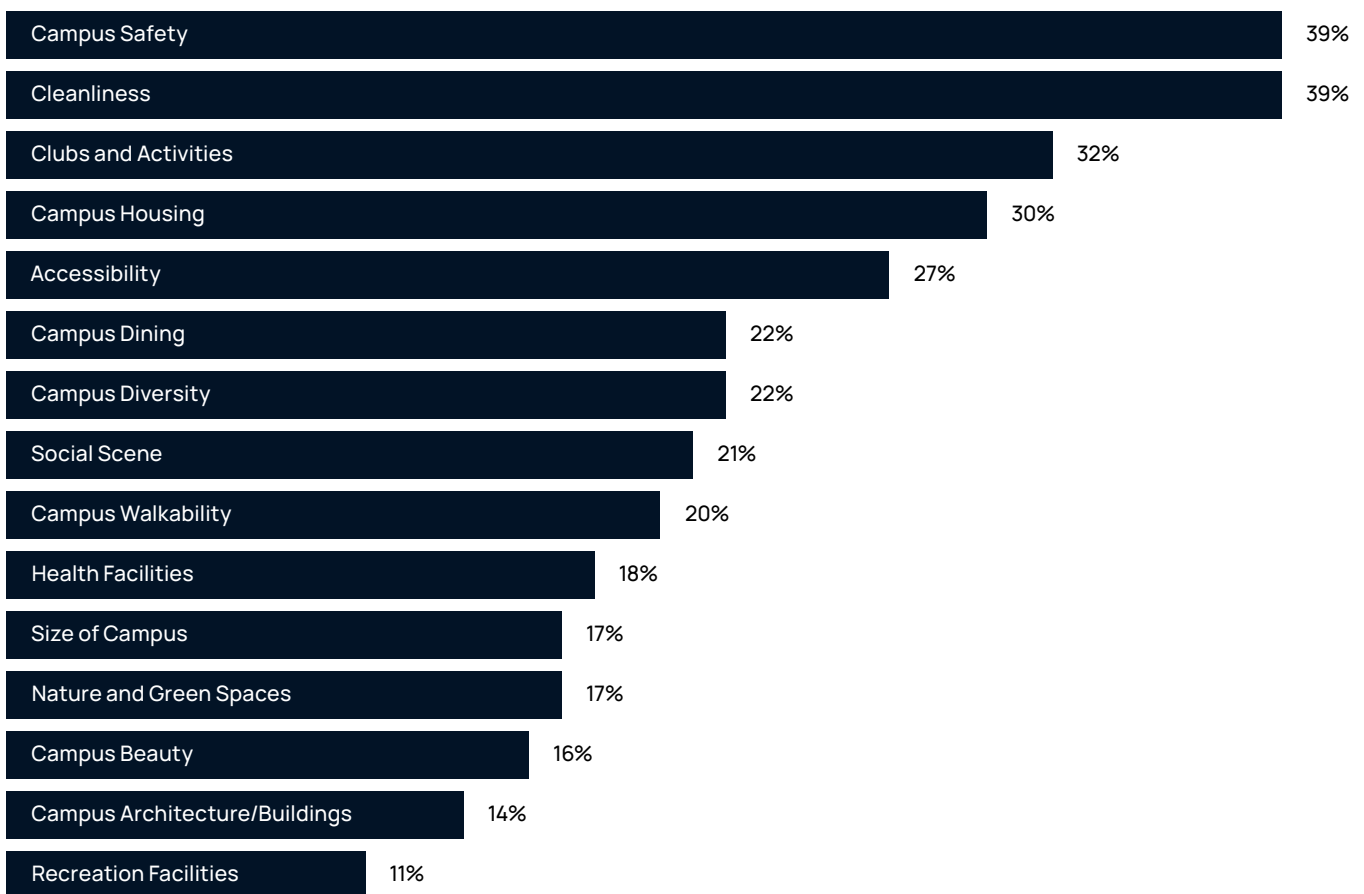
Students are thinking about safety, cleanliness, and the overall environment of the campus. These factors influence whether they can imagine themselves living there, not just visiting.

In prior [Carnegie research](#), safety and environment consistently rank among the most important campus-related factors in decision-making.

These are not secondary considerations or just parental concerns. They are foundational. If students do not feel safe or comfortable, it becomes difficult for them to picture a future at that institution.

Campus Features (Select Up to 4.)

Which of these campus amenities or attributes is most important to you?



Campus Feel Is a Filter for Decision-Making

Students may begin with a broad set of schools based on academics or location, but their final decision often comes down to whether a campus feels right. This is where emotional and practical considerations converge.

In [earlier research](#), students showed an increasing reliance on “fit” and emotional connection when making final enrollment decisions.

That pattern continues here. Students are not choosing institutions based on a single factor, they are making a holistic decision that blends logic with instinct.

“

Students are looking for more than a place to attend. They are looking for a place where they can belong.

That starts with being clear about what they can expect. What support looks like. What community feels like.

You can build a curriculum and still miss the student. Designing the experience starts with the student. It's how they transform and find their place in the world.

Promises made have to equal promises kept. That builds trust and becomes the foundation for **enrollment, connection, and long-term success.**



Joretta Nelson

Senior Executive Advisor,
Strategy & Student Success
Carnegie

Academic
Flexibility and
Real-World
Readiness
Matter Most

Academic Flexibility and Real-World Readiness Matter Most

Students are approaching higher education with a clear focus on what comes next and whether it is worth the investment.

They are thinking about how their academic experience will translate into real opportunities, how it will fit into their lives, and how much flexibility they will have along the way. This is shaping not only what they study, but how they choose where to study.

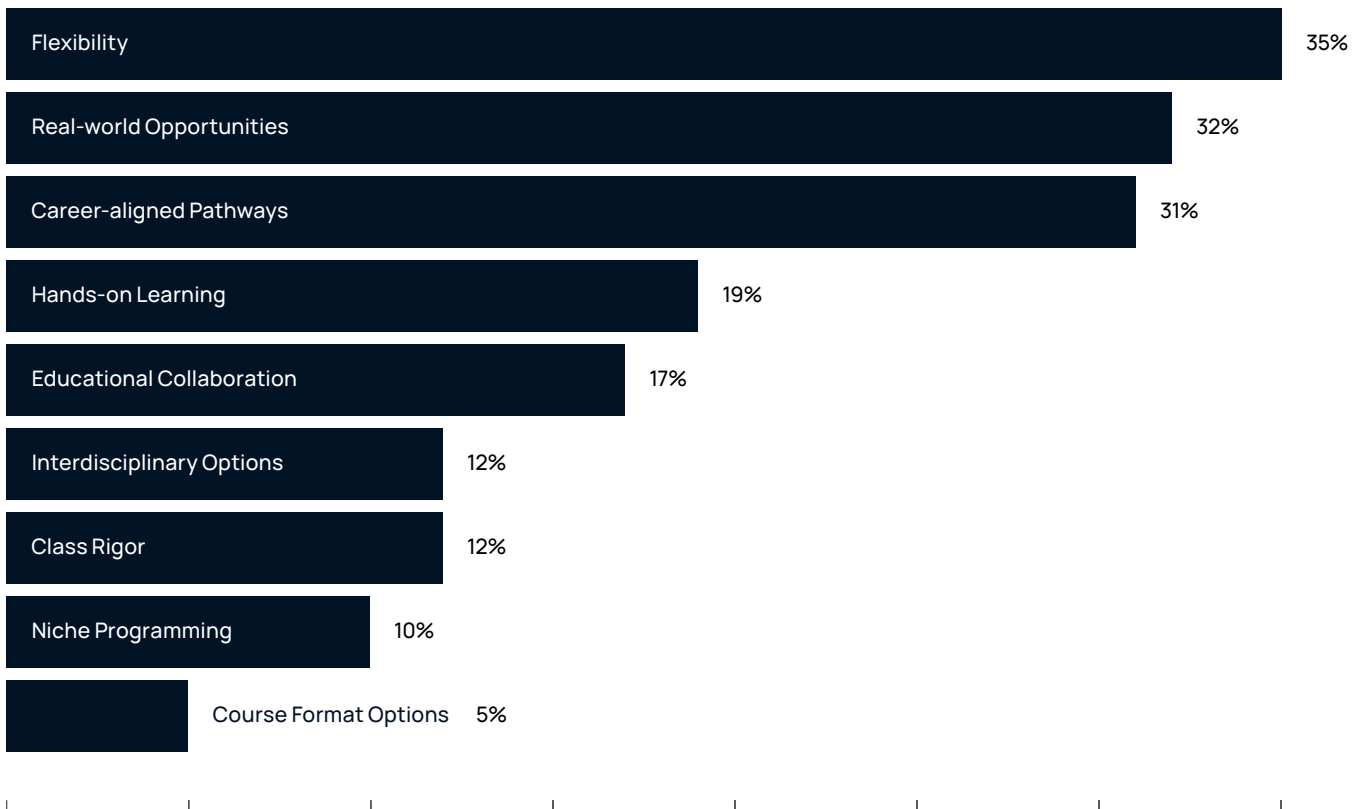
Academics rank as the most important factor in the college decision, with 31% of students identifying it as their top priority.

That result reinforces something consistent across [Carnegie research](#).

Students are still deeply motivated by learning and outcomes.

Academic Experiences (Select Up to 2.)

Which of these factors of an academic experience are most important to you?



Flexibility Is a Core Expectation

Students are placing a high value on academic environments that allow them to explore, adapt, and change direction.

Academic flexibility ranked higher than any other factor as the most important aspect of respondents' academic experience.

This reflects a broader mindset. Students are not always entering college with a fixed academic plan. Many want the ability to test interests, shift majors, and shape their experience over time without penalty.

For this audience, flexibility was about getting to take the classes they want and study what they care about, and not being stuck in gen ed courses they don't think matter.

35%

of survey respondents said flexibility was in their top two most important aspects of their academic experience.

“

I would want the safety of easily being able to switch if I change my mind, so having a variety offers me that security.”

Qualitative response from college-seeking student

Students Are Focused on Real-World Outcomes

Students are looking for clear connections between what they study and what they will do after graduation.

After flexibility, students prioritize academic experiences that offer real-world opportunities and clear connections to future careers.

These priorities show up in how students talk about value. They want internships, job placement support, and experiences that help them build skills while they are still enrolled.

They are also looking for signals that their investment will lead to stability. That includes understanding career pathways, earning potential, and how quickly they can enter the workforce.

Programs that cannot articulate outcomes in concrete terms are at a disadvantage before the student even applies.

32%

of students prioritize real-world opportunities.

31%

prioritize career-aligned pathways.

Students Are Looking for What Comes Next

Students are not just choosing a major. They are choosing an academic program that needs to fit into their daily lives.

They are balancing exploration with practicality, and ambition with responsibility. Academic programs that reflect that balance will feel more relevant and more attainable.

When institutions clearly communicate how students can explore, adapt, and connect their education to real outcomes, they reduce uncertainty and build confidence in the decision.

Outcomes are no longer a supporting message, it's how students define value.

“

Students are not separating academic experience from what comes next. They are asking how what they study connects to potential careers and long-term stability.

When the link between academics and careers is clear, students stay engaged. When it is not, they hesitate.

Institutions have an opportunity to make that connection more visible. Show how programs build skills. Connect those skills to careers. Make outcomes part of the academic story from the start.

When students can see where their education leads, they move forward with greater confidence and are more likely to persist and succeed.



Shankar Prasad

Chief Strategy Officer
Carnegie

BRAND

Brand Matters,
but Authenticity
Matters More

Brand Reputation Matters

Students are paying attention to brand, and for some, it plays a defining role in the decision.

In our survey, 9% of students say brand reputation is the most important factor in choosing a college, ranking it above academics, cost, and campus experience.

Students associate well-known institutions with credibility, opportunity, and recognition in the job market. For some, that signal carries enough weight to shape their decision.

At the same time, brand is rarely considered on its own. Most students are evaluating it alongside factors that speak more directly to their experience and future.

Students are not only noticing the name. They are paying attention to how an institution presents itself and whether it feels clear, consistent, and real.

Brand shapes whether an institution feels credible and trustworthy enough to consider.

87%

of students said it was at least slightly important that their education comes from a college with a recognizable brand.

9%

of students say brand reputation is the **most important** factor in choosing a college.

Students Use Brand To Understand the Experience

When students evaluate a college's brand, they are looking for signals that help them understand what the experience will be like.

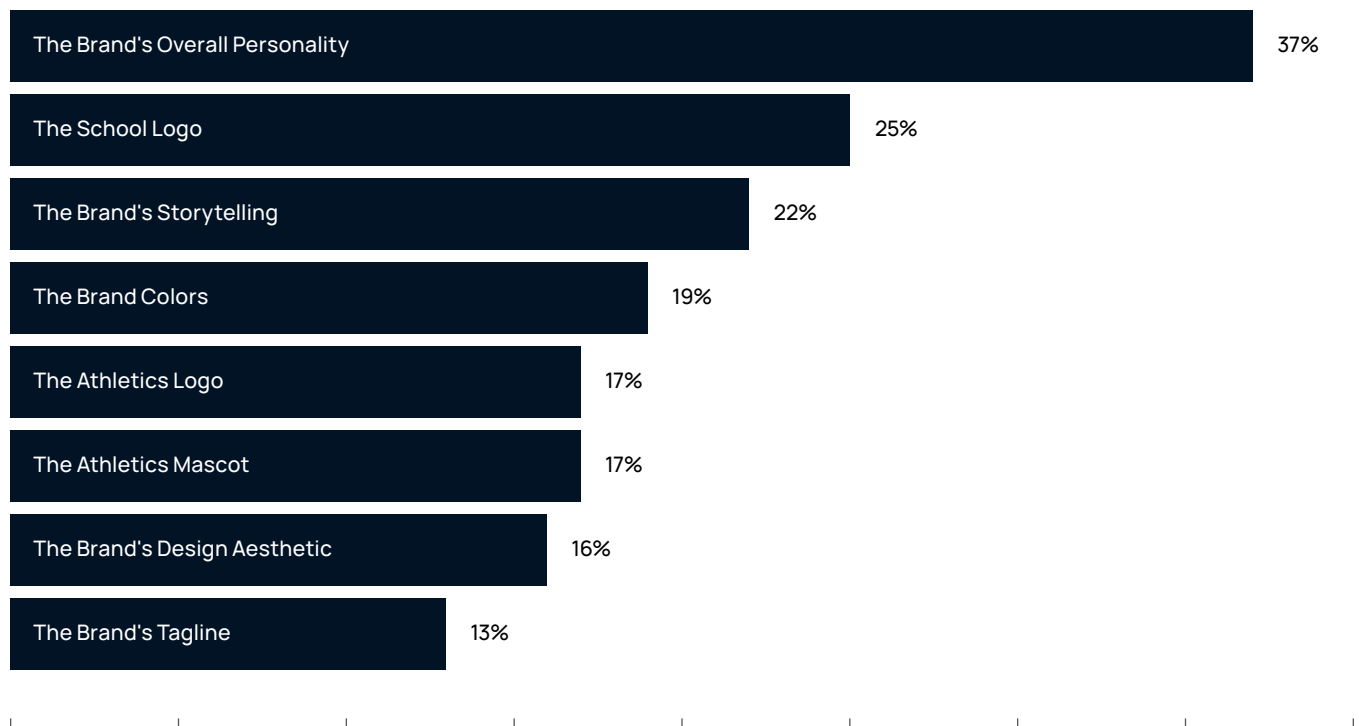
They pay attention to how an institution presents itself, the stories it tells, and the people it represents. These elements help students form an impression before they ever engage directly.

This aligns closely with how students describe campus feel. They are looking for cues that help them determine whether they would feel comfortable, supported, and able to belong.

Brand becomes one of the ways students interpret that experience. It helps them decide whether to continue exploring or move on.

Brand Attention (Select Up to 2.)

Which parts of a college or university brand do you pay most attention to?



Authenticity Builds Trust

Students are highly attuned to whether something feels real.

They respond to content that reflects actual student experiences, clear communication, and a sense of honesty about what college will be like. When messaging feels overly polished or disconnected from reality, it creates distance.

This shows up clearly in how students talk about transparency.

Authenticity is about showing what is true and making it easy for students to understand.

What makes college marketing and information coming from a college feel authentic to you?

“

If you can tell they aren't hiding anything and the things they talk about come with the pros and the cons and it feels like they are trying to help you decide if you'd fit there instead of just trying to get everyone.”

Authentic student voices, transparent data about costs and career outcomes, and clear, straightforward communication make it feel real to me.”

Qualitative response from college-seeking students

People Carry More Weight Than Institutions

While brand plays a role, students consistently place more trust in people.

In prior [Carnegie research](#), students showed greater trust in user-generated content and personal sources such as friends and family than in institution-produced content, particularly on social media. And in this survey, a majority of students said they would trust a personal connection over information shared directly by a college.

While this information isn't new, it reinforces a clear dynamic. Students place more trust in peers, family members, and real student experiences.

These sources feel more credible because they are perceived as unfiltered and honest.

Institutional messaging still matters, but it is interpreted through that lens. Students are looking for alignment between what a college says and what others say about it.

70%

of students trust a personal connection over information directly from a college.

Authenticity Is What Makes Brand Believable

Students are navigating a landscape where trust is harder to earn.

They are evaluating information across multiple sources, comparing perspectives, and looking for consistency. In that environment, authenticity becomes a deciding factor.

Brand still matters. It shapes perception, creates recognition, frames the experience, and most importantly, it builds trust.

Authenticity determines whether a brand is trusted, and brands are competing for much more than student attention. They're competing in the incredibly personal crucible of human connection.

Institutions that show up clearly, honestly, and consistently will build stronger connections with students and the communities that shape their decisions.

“

We don't have a storytelling problem in higher education. We have a personality problem. Not a lack of it. An inconsistency expressing it.

Students notice when a voice feels consistent, when it reflects real experiences, and when it sounds like it's coming from a place of authenticity.

Getting there takes discipline. It requires vision, leadership, alignment, and an institution-wide commitment to showing up consistently and authentically everywhere, with one personality that rings true at every touchpoint—in all marketing and communications.



Joe Master

SVP, Brand Management
Carnegie

MARKETING THAT UNDERSTANDS THEM

Students Want
Marketing That
Understands Them

Students Want Marketing That Understands Them

Students expect college marketing to deliver both clarity and connection. They're looking for signals that an institution understands their reality.

They expect clear, practical information they can use, and they want it delivered in a way that feels relevant to who they are and what they are navigating. That expectation shapes how they engage with content, how they evaluate messages, and whether they continue exploring a school.

In the research, 72% of students say it is at least somewhat important that college marketing proves the institution understands them.

This is one of the strongest signals in the study. It reflects a clear shift in how students interpret communication.

They are not just asking what a college offers. They are paying attention to how that message is delivered and whether it feels relevant to their experience.

72%

of students say it is important that college marketing proves the institution understands them.



Relevance Is the Entry Point

Students are exposed to a constant stream of content and make quick decisions about what is worth their attention.

In many cases, that decision happens in seconds.

Messages that feel generic or broadly targeted are easy to ignore. What stands out is content that reflects a student's interests, concerns, and goals in a way that feels specific and immediate.

Students are also paying close attention to who is represented and how those stories are told. They are looking for people they relate to, experiences that feel familiar, and examples that reflect real student life.

When students can see themselves in the content, they are more likely to engage and continue exploring. When that connection is missing, it becomes just as noticeable and creates distance early in the decision process.

Relevance is what determines whether a message is considered at all.

What makes college marketing and information coming from a college feel authentic to you?

“

I feel as if it is them speaking directly to my interests.”

When they really want to get to know what type of person you are not just focused on academics.”

Qualitative response from college-seeking students

Personalization Moves Students Forward

Getting a student's attention is only the beginning.

Once they engage, students expect communication that reflects what they need in the moment and helps them take the next step. They are not only looking for content that feels relevant. They are looking for information that feels useful.

Personalization plays a critical role in that experience. It signals that an institution understands where a student is in their decision process, what questions they are trying to answer, and what matters most right now.

This does not require more content. It requires more intentional communication.

Messages should reflect what students care about, provide clear and practical information, and make it easy to move forward. When that clarity is missing, even interested students can lose momentum.

Personalization turns interest into action.

When institutions align relevance, clarity, and timing, they create a more consistent and meaningful experience that builds engagement and helps students continue their decision with confidence.

69%

of students say it's at least somewhat important that media feels personalized to them.

“

College information feels authentic to me when it feels like they took the time to get to know me instead of receiving the same generic message that everyone else got.”

Qualitative response from college-seeking student

MARKETING THAT UNDERSTANDS THEM

Understanding Is What Makes Marketing Work

Students are not separating how a message feels from what it delivers.

They expect marketing that reflects who they are and what they need at the same time. Content needs to feel relevant, but it also needs to be useful. When both are present, it creates momentum. When one is missing, it creates friction.

Students engage with content that feels personal and reflective of real experience. They respond to messaging that is clear, direct, and easy to navigate. They pay attention to whether information helps them take the next step.

This is where marketing becomes more than communication.

Marketing is how institutions demonstrate understanding. It is where brand, message, and experience come together to show students that they are seen, heard, and supported.

That understanding shows up in three ways. Relevance earns attention, clarity makes information usable, and personalization helps students move forward.

Marketing that shows students you “get” them is not optional. It determines whether engagement happens at all.

“

Make personalization part of the experience, not just the message.

Students expect communication that reflects their interests, their stage in the process, and the questions they are trying to answer.

Personalization today is not about adding a name to an email. It is about delivering the right message at the right time in a way that feels useful and relevant.

That requires connecting data, content, and channels so that communication adapts as students move through their journey.



Trent Gilbert

VP, Enrollment & Marketing Solutions
Carnegie

DISCOVERY IS FRAGMENTED

Discovery Is
Fragmented Across
Search, Social, and
AI, but Traditional
Channels Still Work

Discovery Is Fragmented Across Search, Social, and AI, but Traditional Channels Still Work

The way students discover colleges isn't linear.

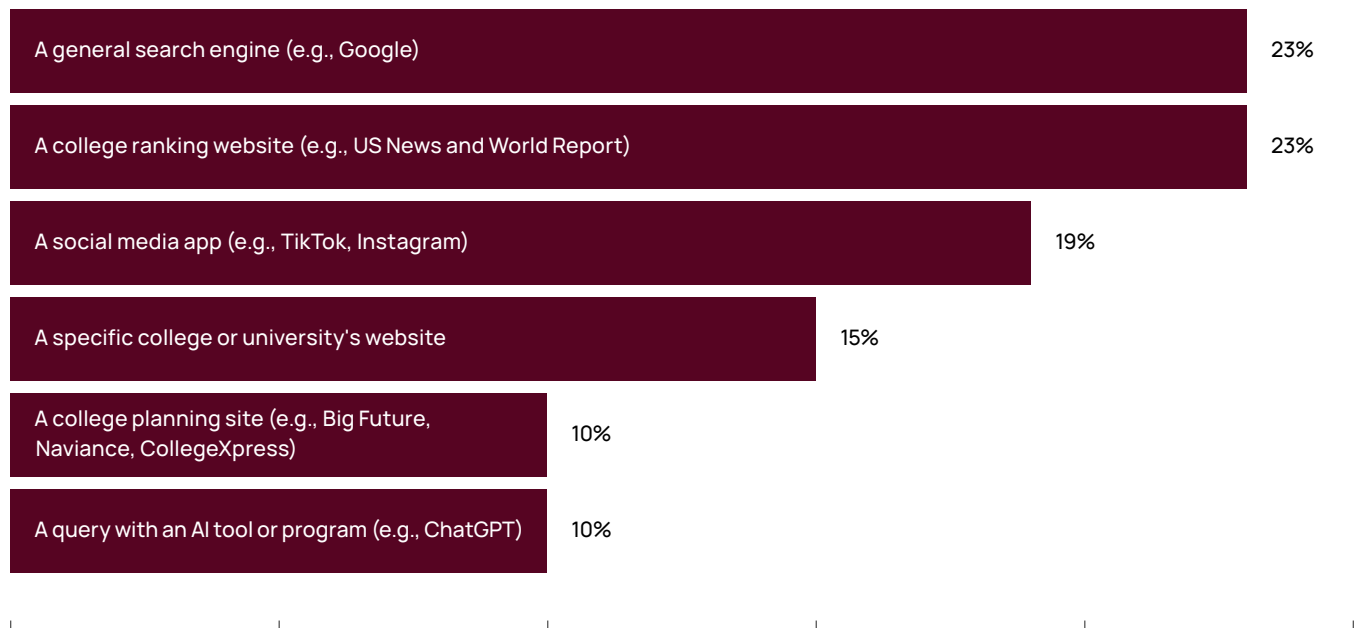
There is no single starting point, no consistent path, and no predictable sequence of steps. Students move across platforms, tools, and sources of information as they explore their options, often returning to the same institution multiple times through different channels.

The research reflects that fragmentation clearly.

Students report beginning their college search in a range of places. No single channel dominates. Discovery is distributed.

Starting the College Search

Which of these digital resources would you be most likely to use to start your college search process?



Search Remains a Foundational Entry Point

Search continues to play a central role in how students begin exploring colleges.

Whether through traditional search engines or structured ranking sites, students rely on search to gather initial information, compare options, and build a starting list of schools.

This reflects a familiar behavior. Students begin broadly, then narrow their focus over time.

Even as new platforms emerge, search remains one of the most consistent and reliable entry points into the college decision process.

23%

of students said they would be most likely to use a “General Google Search” to start their college search process.

Imagine you are using a search engine like Google and want to learn more about colleges and universities. What search query would you use?

General Query Words

- Colleges
- Best Colleges
- Colleges Near Me
- Good Colleges
- College Website
- Universities
- College Search

Phrases or Themes

- College Rankings
- Major and Career Paths
- Would I Get Into X College
- Location and Proximity
- Institution-specific
- Cost and Affordability
- Campus Life and Culture

Specific Degrees

- Art
- Education
- Engineering
- Nursing
- Psychology
- Business
- Medical
- Law
- Computer Science
- Music
- Architecture
- Design

Social Media Shapes Early Exploration

In the research, 19% of respondents say they would begin their college search on social media platforms.

This suggests that discovery often happens in environments where students are already spending time.

Social platforms introduce students to colleges in a more informal, experience-driven way. They provide glimpses into campus life, student perspectives, and day-to-day experiences that feel immediate and relatable.

Many of the platforms students use most are video-driven, which should shape how institutions think about content strategy. They are not just reading about a college. They are watching it, experiencing it, and forming impressions in real time.

This reinforces what students have told us previously: they're drawn to content that feels real and reflects actual student life.

19%

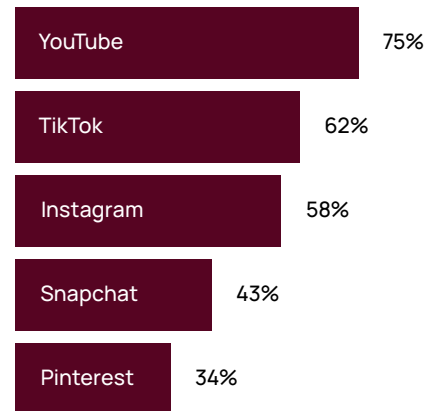
of prospects we surveyed said they would begin their search on social media.

2/3

of prospects we surveyed would be at least somewhat comfortable with a school reaching out on social media.

App Use (Select All That Apply.)

Which of these social media apps do you use on a regular basis?



AI Is Emerging as a New Layer of Discovery

AI tools are beginning to shape how students access and interpret information.

When searching online, 49% of students say they read the AI-generated overview before exploring other results.

This introduces a new dynamic.

Students are not always engaging directly with institutional content first. They are often encountering summarized, aggregated information that influences how they understand a school before they click through to a website.

As a result, AI is reshaping how search results are experienced.

First impressions are increasingly shaped by platforms institutions do not own.

49%

of students read AI-generated summaries before exploring search results.

Imagine you are using ChatGPT to learn more about colleges and universities. What prompt would you use?

General AI Prompts

- Help me learn more about college.
- What are some colleges near me?
- What are the best colleges for X major?
- Tell me the good and the bad about X college.
- How much is tuition at X college?
- Show me universities that offer X.
- What affordable colleges near me fit my passions?
- Can you tell me what X has to offer and the requirements for acceptance?
- What are the best colleges for me?
- What is the best way to get into a lot of colleges?

AI Themes

- Other/General Inquiry
- Reputations and Quality
- Majors and Career Interest
- General School Info
- Location and Geography
- Cost and Financial Aid
- Personal Fit and Recs
- Admissions and Eligibility
- Campus and Student Life
- Success and Outcomes

DISCOVERY IS FRAGMENTED

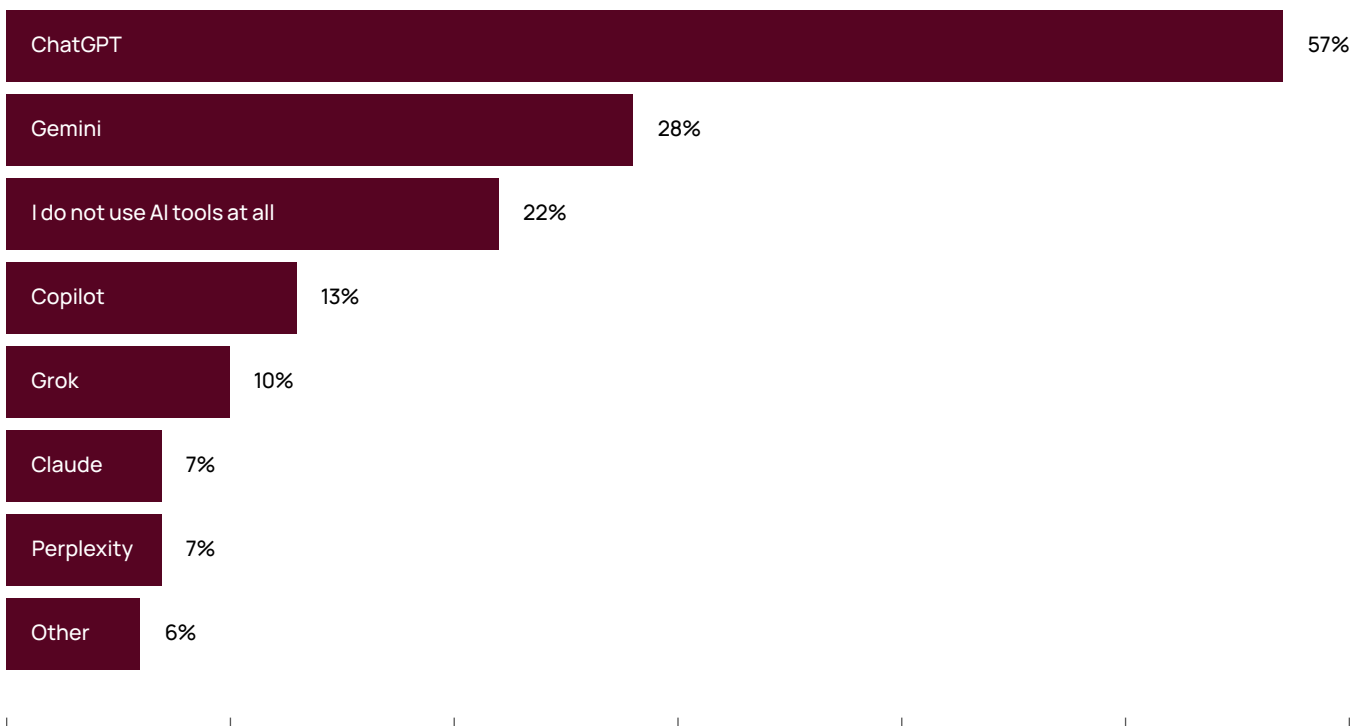
AI-driven search is already shaping how students find and evaluate colleges. You're either showing up in those moments, or you're not.

Each platform operates differently, and those systems will continue to evolve, making prioritization critical.

Understanding where students are searching, how they use each platform, and what they trust should guide where you focus, how you optimize, and how you show up with content that is consistent, authentic, and relevant.

AI Tools Used (Select All That Apply.)

Which of the following AI tools do you use?



Traditional Channels Still Play a Critical Role

While discovery is expanding across platforms, traditional digital channels remain important.

Search engines and institutional websites continue to serve as key sources of information, particularly as students move deeper into the decision process. Students may first encounter a college through social media or AI, but they often return to more established sources when they are evaluating details, comparing options, and making final decisions.

And email isn't dead. Students regularly check their inboxes and view it as a more private and professional way to receive information from colleges. It creates a sense of separation from social platforms and supports clearer digital boundaries.

This reinforces an important point. Students are navigating across channels, not moving away from them.

78%

of students said they check their email at least monthly.

35%

of teens in our study said they check it at least daily.

DISCOVERY IS FRAGMENTED

Discovery Is a Continuous Process

Students are navigating a broader, more complex discovery environment than previous generations.

They are gathering information from multiple sources, forming impressions quickly, and revisiting institutions across different platforms.

For institutions, this creates both a challenge and an opportunity.

The challenge is maintaining visibility and consistency across a fragmented landscape. The opportunity is meeting students where they already are, with content that reflects how they search, explore, and evaluate.

Institutions that show up clearly and consistently across these channels will be better positioned to stay part of the conversation as students move through their decision process.

Inconsistency across channels signals unreliability. Students often won't reconcile contradictions, they'll move on.

“

Students are not moving through a funnel. Their journey is not linear.

They discover a school in one channel, validate it somewhere else, and then come back through a completely different entry point. And every one of those moments shapes how they perceive that institution.

That is why consistency matters.

Students expect to see the same institution show up across multiple channels in a way that feels connected, consistent, and familiar. When it does, it builds confidence. When it doesn't, it creates friction.



Alexa Poulin

Chief Digital Officer
Carnegie

WHAT THIS MEANS FOR HIGHER ED

What This Means for the Future of Higher Education

Where to Start

Higher education is no longer just competing for preference, it's competing for feasibility. So where do you start? We recommend these six strategic shifts to demonstrate authenticity, reinforce viability, and show students that college is truly within reach.

1. Start with clarity around cost.

Not just tuition, but the full financial picture students and families are trying to understand. What it means, how it works, and what is actually within reach.

STRATEGIC SHIFT: SHOW COST OF LIVING + REAL STUDENT FINANCIAL STRATEGIES

2. Revisit how campus life is represented.

Move beyond idealized versions and show what day-to-day life actually feels like. Students are looking for a place they can see themselves.

STRATEGIC SHIFT: POLISHED CAMPAIGNS < DAY-IN-THE-LIFE

3. Look closely at academic messaging.

Programs should feel flexible, relevant, and connected to real outcomes. Students want to understand how what they study translates into what comes next.

STRATEGIC SHIFT: EVERY PROGRAM PAGE = CAREER PATHWAY

4. Strengthen brand presence so it feels human, consistent, and trustworthy across touchpoints.

Students are paying attention to tone, transparency, and whether the experience being portrayed feels real.

STRATEGIC SHIFT: DISPLAY REAL PERSONALITY (INCLUDING IMPERFECTIONS)

5. Build communication strategies around actual student experiences.

What they are weighing, where they hesitate, and what helps them move forward should shape how and when you show up.

STRATEGIC SHIFT: MOVE FROM GENERAL PERSONALIZATION TO DEMONSTRATED UNDERSTANDING

6. Design for non-linear discovery.

Discovery is happening across a mix of platforms, including AI tools, search, social, and peer-driven spaces. Your channel and content strategy should reflect that reality.

STRATEGIC SHIFT: TOP OF FUNNEL STRATEGY = AI DISCOVERY + SOCIAL PLATFORMS

These are not separate efforts. They are connected parts of a broader approach to how institutions build relationships with students, grounded in a clearer understanding of what matters to them.

Aligning Around the Next Generation

The shifts shaping student decision-making extend beyond any single campaign, channel, or team. They reflect a broader change in how students experience, evaluate, and define the value of higher education.

This discussion is designed to help your team align around that shift and identify where your current strategy supports—or falls short of—how students are making decisions today.

1. Cost & Feasibility

Does college feel possible to students considering your institution?

Questions to Ask:

- Where might cost feel unclear or incomplete, to a prospective student?
- Are we presenting tuition, or the full cost of living and attending?
- What assumptions are students forced to make on their own?
- At what point in the journey does affordability become clear?

Pressure test: If a student had to explain the real cost of attending our institution to their family, could they do it confidently?

2. Clarity & Transparency

Are we making the student experience easy to understand?

Questions to Ask:

- Where is information difficult to find, interpret, or trust?
- What do students learn only after they apply or enroll?
- Are we showing tradeoffs as well as benefits?
- Where might we be asking students to “figure it out”?

Pressure test: Where are we unintentionally creating doubt through lack of clarity?

3. Outcomes & Value

Can students clearly see what comes next?

Questions to Ask:

- How clearly do we connect programs to careers and outcomes?
- Are we showing specific pathways or speaking in generalities?
- What proof points do we provide, and how accessible are they?
- Where might students struggle to understand the return on their investment?

Pressure test: Could a student quickly answer: “What will this degree help me do?”

4. Relevance & Human Connection

Does our communication reflect real student experience?

Questions to Ask:

- Where does our messaging feel generic or overly polished?
- Do students see people like themselves in our content?
- Are we addressing real concerns or idealized expectations?
- How well does our communication reflect the realities students are navigating?

Pressure test: Does our messaging feel like it understands students, or speaks at them?

5. Alignment Between Promise and Experience

Do we deliver what we communicate?

Questions to Ask:

- Where might there be a gap between what we promote and what students experience?
- How consistently does our message carry across departments and channels?
- What do current students say that differs from our marketing?
- Where are expectations being set that we cannot fully meet?

Pressure test: If a student compared our messaging to real student experiences, would they align?

WHAT THIS MEANS FOR HIGHER ED

Making It A Campus-wide Commitment

These are not questions for one team to answer alone.

They belong in the rooms where strategy is set.

They belong in the places where student experience is shaped.

They belong in the broader conversations happening across the industry.

Because this moment is not static. It is still unfolding.

And the institutions that move forward with clarity and confidence will be the ones that engage with it directly, ask better questions, and stay connected to how students are actually thinking and deciding.

Interested in the data that powered this analysis?

Request the data tables.

Keep an eye out for future segment reports.

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