
CARNEGIE

WEBINAR

The Next Gen Learner: *What's Changed and What to Do About It*



Housekeeping

1

This webinar will be recorded, and slides will be shared via email later this week.

2

Have a question for our panelists? Drop questions in the Q&A box, we'll have time at the end of the webinar.

3

Closed captions are available. The icon to enable them is in the control panel at the bottom of your Zoom window.

Your Presenters



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We wanted to understand what's driving decisions for the next generation and *why it matters to them.*



3,300+

teens age 13-18

51%

said they were not interested in attending college. Today we're focusing on the 49% that said they were.



Most teens still believe in the value of higher education but the path to that decision looks less direct than it used to.

They are weighing college against the realities of their daily lives. They are balancing cost, flexibility, and practical outcomes while asking whether it fits into what they can manage right now.

Students are asking the question:
Can college work for me?



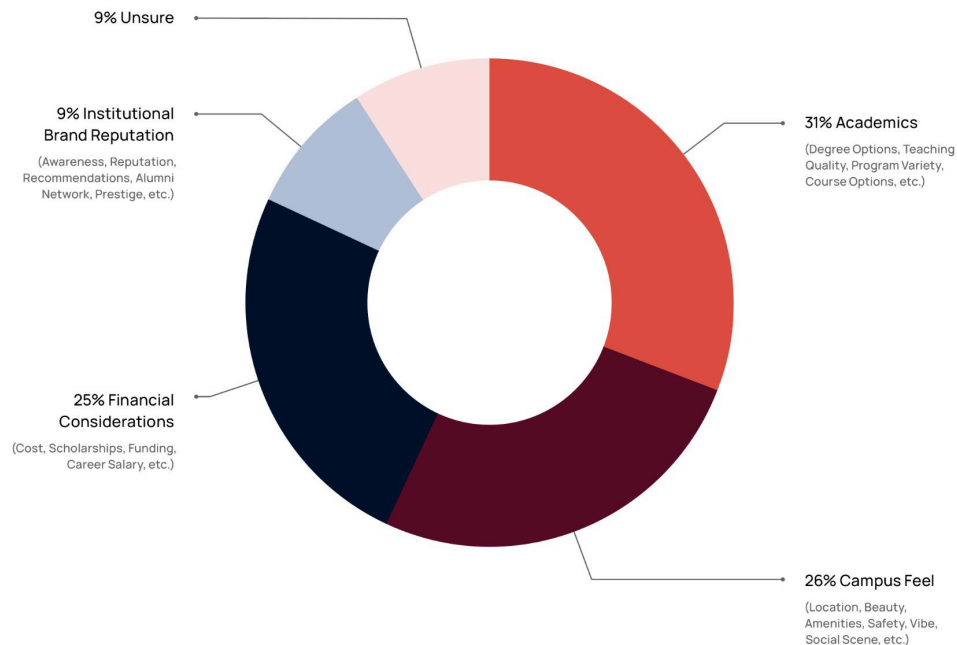
*Feasibility is
the new filter*

Most Important Factors

Based on prior Carnegie research we consistently saw factors pop up as the top decision drivers. We used that list to help shape the questions we asked in this report.

Most Important Factor

Which of these four factors is most important to you?



Six Key Findings

- + The Ability to Afford College Outweighs ROI
- + Campus Feel & Belonging is a Deciding Factor
- + Flexibility & Real World Readiness Matter Most
- + Brand, Authenticity & Transparency is Crucial to Building Trust
- + Students Want Marketing that Understands Them
- + The Funnel is No Longer Linear





*The Ability to Afford College
Outweighs ROI*

Affordability outweighs ROI

61%

Of respondents were more focused on their ability to afford college than ROI.

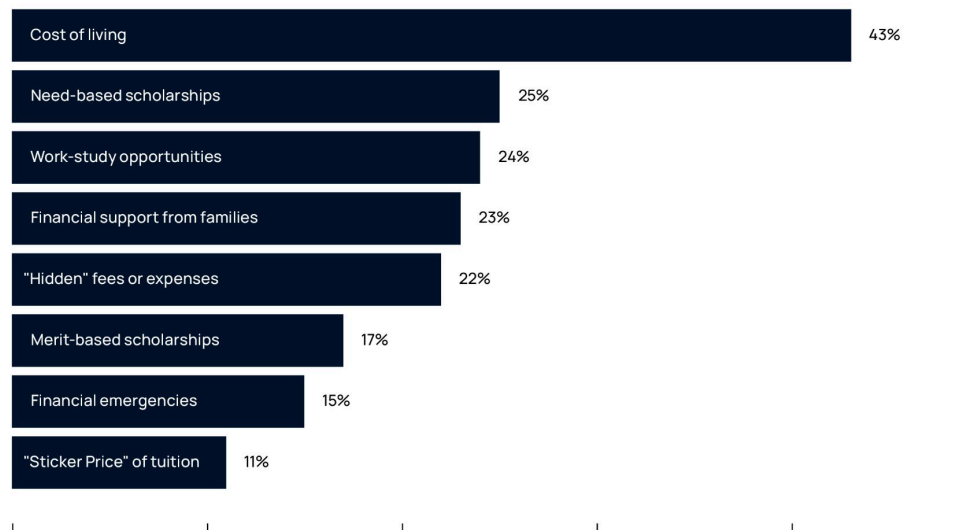


Cost of Living

Was the top financial consideration for respondents who were more focused on their ability to pay.

Financial Considerations (Select Up to 2.)

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



Affordability should be visible, not abstract

- Make total cost clear (not just tuition) → like directly address cost of living in your materials via tables/charts/examples/stories
- Show how students actually piece together affordability
- Reduce ambiguity → lean into transparency - don't bury costs, educate the different pieces of the build up (What is work study? How many students get it? What do you get for doing that?)



*Campus Feel Is Emotional,
Social, and Practical*

*Campus feel is
a decision filter,
not a soft factor.*

26%

Said campus feel is the most important factor to them in choosing a college.



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

What does “Campus Feel” mean to you personally?

“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.”

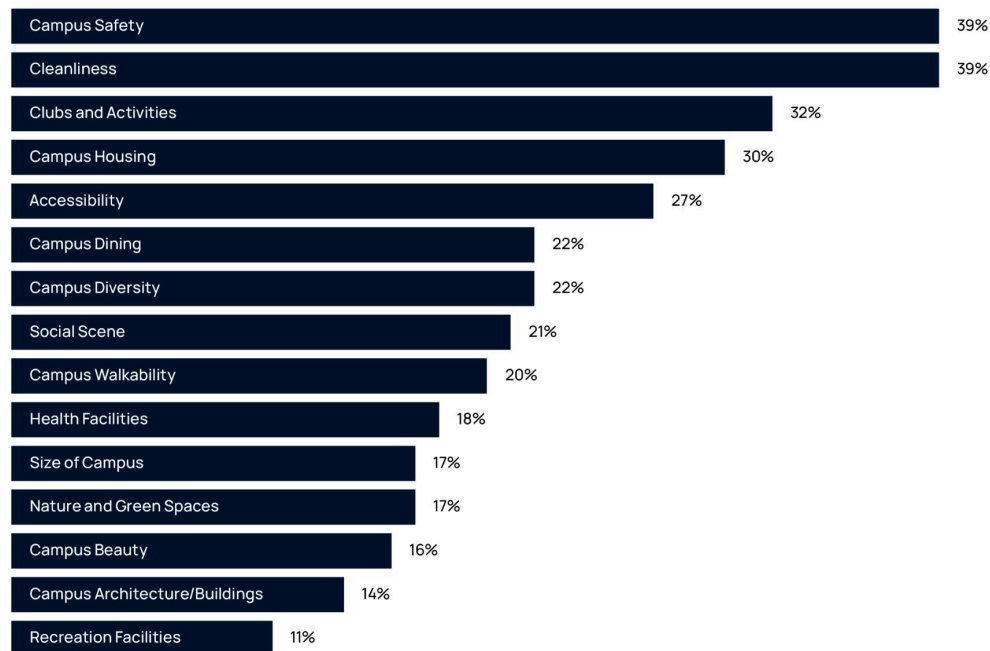
“Campus feel is like the aesthetic of the campus. For example, a college with a big and studious library, or a certain design on a railing.”

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

Safety, Environment, and Practical Considerations Matter

Campus Features (Select Up to 4.)

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



They want to be able to see *themselves* on your campus


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



What to do about it:

- Audit whether your content shows real student life
- Replace idealized messaging with lived experience
- Safety & Cleanliness → if they want it and you have it, talk about it
- Make belonging visible early in the journey



Learners value *flexibility*
and *real-world readiness*

Flexibility and Real-World Readiness are Priorities

35%

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

32%

said real-world opportunities. was in their top two most important aspects of their academic experience.



Variety is a *core expectation*

Why do you prefer academic
variety at a college?


“A college that offers a wide variety of courses and majors is far more beneficial. This allows students to explore different fields, discover new interests, and find a program that truly aligns with their passions and career goals.”

“Specificity is good for those that know exactly what they're going for, but I know a lot of people who have changed majors partway through, and without variety it can make that more difficult.”

“A broad, diverse curriculum is generally better for fostering critical thinking and adaptability, while specialized, targeted programs often lead to higher immediate job-market readiness and higher salaries in technical fields.”

What to do about it:

- Show how programs adapt to student needs
- Connect every program to career pathways
- Lean into preparing for uncertainty
- Make opportunities concrete (not abstract)

A young man with curly hair and glasses, wearing a striped shirt, and a young woman with long dark hair, wearing a blue cardigan, are sitting on a green lawn. They are both smiling and looking at a tablet computer held by the woman. In the background, there is a large, ornate building with many windows, likely a university building. A black lamppost is visible on the right side of the image.

*Brand opens the door.
Authenticity determines whether
students walk through it.*

Brand Reputation Contributes to Decision-making

87%

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

9%

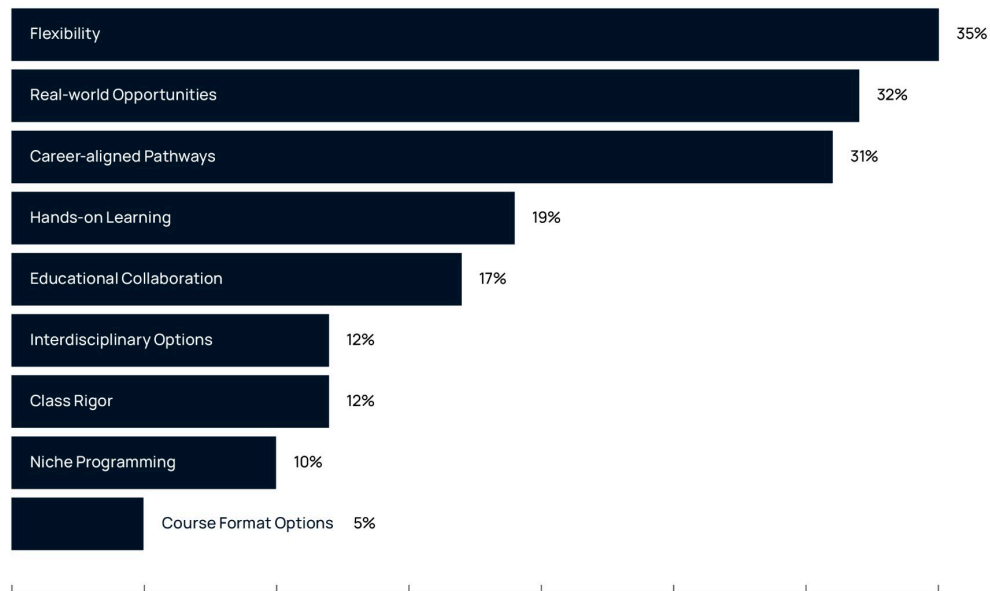
of students say brand reputation is the most important factor in choosing a college.



Students Use Brand To Understand the Experience

Academic Experiences (Select Up to 2.)

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



Authenticity Builds Trust

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.”

“College marketing feels authentic to me when it shows real student experiences instead of just perfect-looking photos and slogans. Hearing honest stories from current students or alumni about both the good and challenging parts of campus life makes the information feel more trustworthy.”

70%

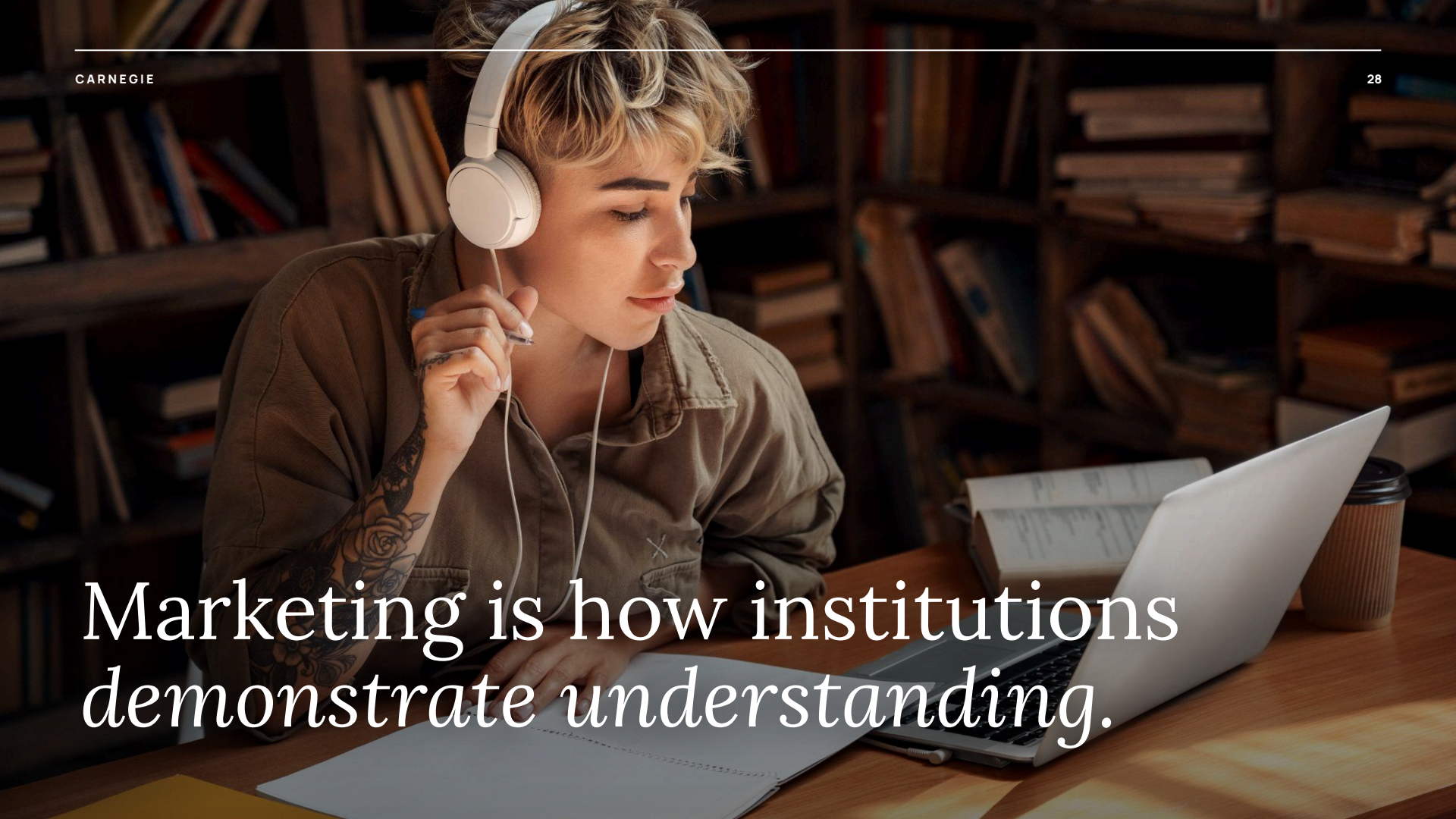
trust personal connections
over institutions

Students are highly
sensitive to what feels “real”



Authenticity Is What Makes Brand Believable

- Identify not just what you offer and how you offer it, but who you are and why you exist as a brand
- Audit consistency across touchpoints – and track adoption
- Show tradeoffs, not just benefits
- Align messaging with actual experience



Marketing is how institutions
demonstrate understanding.

Students Want Marketing that *Understands Them*

71%

of prospective students in the study said it was at least somewhat important for college marketing to “get you” as a student.

69%

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



Relevance Is the Entry Point

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.”

“When it feels like they took the time to get to know me instead of receiving the same generic message that everyone else got.”

What to do about it:

- Align messaging to student concerns (cost, fit, outcomes)
- Focus on clarity + usefulness in content
- Deliver the right message at the right moment

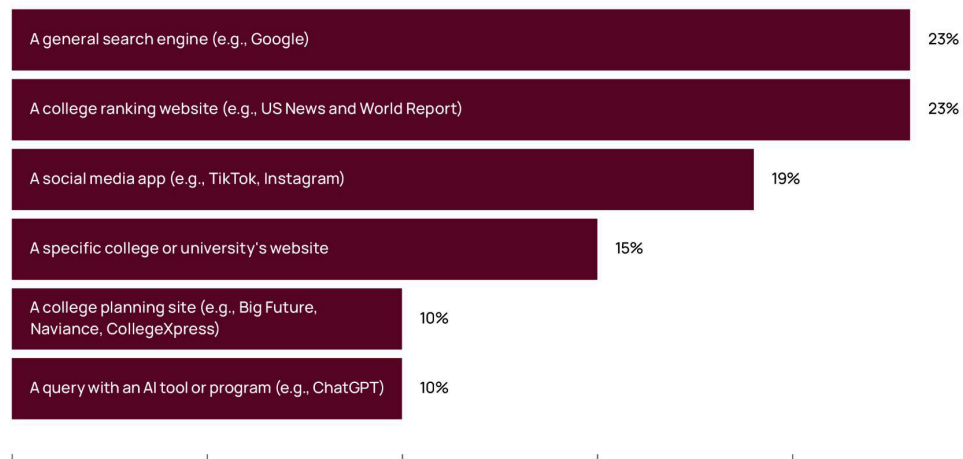


Students don't move
through a funnel—they move
across channels.

Discovery Is Fragmented Across Channels

Starting the College Search

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



Social Media Helps Shape Exploration

19%

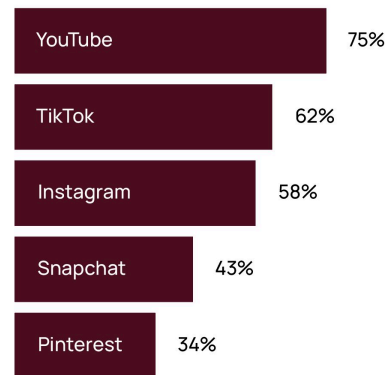
of prospects we surveyed said they would begin their search on social media.

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?



Email Still Plays a *Critical* Role

78%

of teens said they check their email
at least monthly.

35%

said they check it at least daily.



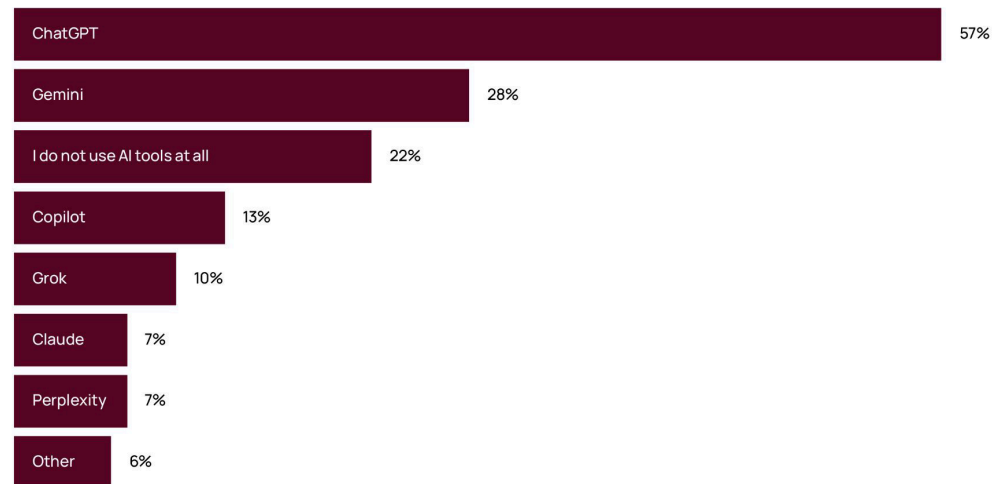
AI Is Emerging as a New Layer of Discovery

49%

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

AI Tools Used (Select All That Apply.)

Which of the following AI tools do you use?



What to do about it:

- Design for multiple entry points
- Ensure consistency across channels
- Think beyond owned channels (AI, search, social)
- Brand personality matters here

Q&A



Activating the learnings to create messaging that resonates

Make Affordability Tangible

- Show full cost of living
- Break down real scenarios
- Remove guesswork

Show What Life Actually Feels Like

- Day-in-the-life content
- Real student voices
- Less polish, more reality

Connect Programs to Outcomes

- Skills → careers → stability
- Make pathways visible
- Answer “what does this lead to?”

Consistency Builds Trust

- Same personality across stories
- Consistency across channels
- Honest communication

Prove You Understand Students

- Reflect real concerns
- Speak to their situation
- Deliver useful information

Show Up Where Students Are

- AI
- Social
- Search
- And stay consistent across all

In Practice: Discussion Guide

We didn't want this to be a report that sits on a shelf. The discussion guide gives teams a way to bring these findings into real conversations so they can ask better questions, challenge assumptions, and make more informed decisions.

WHAT THIS MEANS FOR HIGHER ED

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?"

The Next Gen Learners Report



Download
the Report



THE NEXT GEN LEARNERS REPORT

What the Next Generation
of Learners Wants From
Higher Education

Cost of Living,
Vibes, and
Radical Transparency

CARNEGIE



Ready to take
the next step?



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