



# Engaging the Modern Learner:

**2025 Report on the Preferences & Behaviors  
Shaping Higher Ed**



# Preface

The Modern Learner is in control of their own learning pathway, prioritizing flexibility and accessibility rather than legacy academic experiences dictated by age and geographic location. The Modern Learner sees higher education differently, seeking connections with institutions that align with their evolving expectations, while demanding value, outcomes and authenticity.

Schools that deliver meaningful engagement with the right message, in the right place and at the right time attract Modern Learners. These students choose to enroll based on a school's reputation and their trust in its ability to deliver on promises.

After several years of surveying online college students, we came to the realization that the lines between student populations had blurred to the point where age no longer predicted learning modality preference. All students seek greater control over their chosen academic pathway. Whether enrolled in a traditional campus academic program or pursuing education through online, hybrid or other formats, these students share many commonalities that offer institutions the opportunity to reimagine how they engage with students in this new era of increased choice and greater flexibility.

With this understanding in mind, we were compelled to reexamine how we think about the challenges and opportunities facing higher education. We expanded our annual student survey to include the online students we have historically surveyed as well as those enrolled in on-campus programs during the "traditional" age of undergraduate college enrollment. This has allowed us to deepen our understanding of all Modern Learners, define the core connections shared by all students and identify the unique characteristics that help explain the differences between the many subsets of Modern Learners, including traditional on-campus students, non-traditional and online undergraduates, online graduate students and non-degree seeking students.

Throughout this report, we assess this new survey data against our historic Online College Students Report. We even compare the responses of today's online students against those of their peers from 10 years ago.

This report will help institutions challenge the status quo thinking that narrowly defines students, delivers poor experiences for students, increases cost and leads to inefficient and ineffective strategies. This data is a tool to maximize the potential of the teams, organizations and institutions that serve Modern Learners to transform the lives of countless students, their families and communities.

In our **2024 Online College Students Report**, EducationDynamics uncovered the learner preference and behavior convergence that defined the Modern Learner. With this report, we have set out to facilitate the continued transformation of higher education because we believe its mission has never been more important and that tomorrow's challenges will not be solved by yesterday's solutions.

## With Grateful Acknowledgment

The EducationDynamics team would like to acknowledge and thank Carol Aslanian for her profound contributions to the foundation of this report and a lifetime of service to higher education. For 13 years, Carol diligently surveyed and authored the Online College Students Report, which is the predecessor and foundation for this report on Modern Learners. Her insight and passion were paramount to our understanding of the evolution in student demands and preferences, and we are all forever indebted to her for the contributions she made to EducationDynamics and higher education at large.



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# Introduction

With this year's report, we more fully understand the Modern Learner and their motivations, preferences and expectations, regardless of chosen academic path. This year, the study includes a diverse sample of students, including those enrolled in traditional undergraduate on-campus programs, non-traditional online undergraduate programs, graduate students and those seeking non-degree-conferring credentials at the graduate and undergraduate level. Our objective is to understand and share the evolving profile of students in a rapidly changing higher education landscape.

Modern Learners are more than just students; they are the architects of their own educational journeys. They expect institutions to meet their needs promptly and effectively or they will quickly seek alternatives. Many students consider and evaluate multiple education pathways, including both online and on-campus programs. Schools must rise to the challenge by providing responsive, personalized experiences that cater to these discerning learners, keeping them engaged and satisfied throughout their educational journey.

This report reveals that students at all levels, regardless of modality, are career-focused and see higher education as a pathway to career outcomes. However, the findings also shine a light on opportunities for improvement in how higher education both engages prospective students and serves existing students.

This year's report also gave us an opportunity to conduct a ten-year lookback at how the student journey has changed. This revealed that the ways in which Modern Learners of 2025 research, evaluate and select a school are more complex. Attracting and serving the Modern Learner requires a more sophisticated strategy for recruitment and retention.

The data in this report, highlighted by the following key findings and recommendations, provide a roadmap for reaching, attracting and engaging Modern Learners to build a thriving and sustainable campus.



# Key Findings and Recommendations

To effectively engage and serve Modern Learners—whether they are traditional, non-traditional or graduate students—schools must recognize and address their demands and preferences throughout their academic journey, from consideration to graduation and beyond. While the student population has undergone radical transformation over the past few decades, there is now an opportunity for higher education to transform and meet these students with increased efficiency and new strategies. Unbound from the shackles of the status quo, this report provides a roadmap for that transformation.

Modern Learners are no longer narrowly defined by age and demographics. There are more commonalities across student populations than ever before. The needs and preferences of those students historically classified as traditional and non-traditional, degree-seeking and non-degree-seeking have coalesced in many important ways. This allows for a more cohesive and consistent messaging strategy while demanding a more flexible educational experience.

However, it's equally important to acknowledge and adapt to the unique differences among these groups, such as varying job and life commitments, social media habits and diverse academic interests and preferences.

This balanced approach will ensure that all students feel valued and recognize the value of the higher education experience.

Below are the key findings and recommendations from our survey of the Modern Learner. These findings lay out the framework for a strategic approach built upon strengthened institutional reputation and engagement strategies that deliver the right message at the right time to all students and institutional stakeholders.

## **1. The Three C's of value in higher education are: Cost, Convenience and Career**

The Modern Learner is largely driven by value and a return on investment in the form of cost and expected career outcomes. The most important factors influencing enrollment decisions are cost of tuition and fees (46% of all respondents), availability of program format (38%) and program match to career goals (30%). Their decision to enroll is driven by their belief that the institution effectively communicated career outcomes. Seventy-six percent of respondents agreed that the school at which they enrolled effectively communicated these



career outcomes.

Modern Learners are also architects of their own education. They are less concerned about a school's sector or tax classification, with 50% of respondents stating that a school's sector does not matter, while only 19% of respondents stated a strong preference for enrolling in non-profit institutions.

At the same time, Modern Learners of all ages and stages considered multiple modalities. Forty-seven percent of Modern Learners enrolled in traditional programs would at least consider fully online programs, while 59% of undergraduates enrolled in online programs would consider classroom programs.

Additionally, students enrolled in certificate programs or other non-degree granting programs largely indicate an expectation to enroll again in the future. Eighty-two percent of non-degree-seeking students intend to apply their current studies to future credentials.

## **2. Brand and Reputation Deliver Far-Reaching Impact**

Students start their search by looking for schools that interest them first. Overall, 58% of respondents search for schools before programs, including 54% of traditional undergraduate and 59% of graduate students. Schools earn their way into the consideration process with a strong brand and reputation.

Students typically consider four or fewer schools. Traditional students were more likely to consider more schools, with 80% of traditional students considering four or fewer schools. Non-traditional and graduate students typically consider three or fewer schools.

A school's reputation was also the third most commonly referenced factor in determining where to apply. Reputation was cited by 31% of all students, including 51% of traditional undergraduate students. This trailed only cost (44%) and flexible course schedules (31%) across student populations.

## **3. The Job of Marketing to and Engaging the Modern Learner is Constant and Ongoing**

Enrollment, and even re-enrollment, in an institution does not signify satisfaction nor an intent to continue enrolling in the future. In fact, only one-third of Modern Learners



indicated they are promoters of their educational experience. Interestingly, only 24% of traditional undergraduate respondents rate their experience highly, compared to 41% of fully online students. Enrolled students also indicated a high likelihood to consider other alternatives, even as they continue their academic studies. After initially enrolling at a school, 32% continue to research alternatives.

#### **4. To Effectively Engage Modern Learners, Meet Them Where They Are, With Messages That Resonate**

Modern Learners begin their search process online through searches and website visits, with 47% of respondents starting their research through search engines like Google and an additional 31% beginning directly on the school's website.

While the search experience has evolved significantly with the introduction of generative artificial intelligence, a school's website and web presence remains critical to building a strong reputation and earning a place in the Modern Learner's consideration set. In fact, Modern Learners have largely adopted generative AI and incorporated it into their search experience. Nearly 70% of Modern Learners utilize AI tools or generative AI chatbot platforms like ChatGPT in some form, and 37% of respondents utilized these tools to gather information about schools they were considering.

While social media platform preference varies by learning modality and a student's age, the role of social media is consistent and strong across all Modern Learners. More important than the individual platform of choice, the connecting tissue across all Modern Learner social media preference was the desire for dynamic and visually engaging experiences, largely driven by video. Most students engage across multiple platforms and do so daily.

#### **5. In an On-Demand World, the Student Decision-Making Process is Accelerating**

Modern Learners are decisive in their decision-making process. The time between initial consideration to initial inquiry is fewer than three weeks for 55% of all respondents. This includes a staggering 44% of Modern Learners enrolling in traditional programs.

Additionally, respondents are likely to enroll at the school to which they are admitted first. This includes 50% of traditional undergraduate, 71% of non-traditional undergraduate and 73% of graduate respondents. While a majority of all Modern Learners want admissions



decisions within one week of submitting their application, 52% of students enrolled in traditional programs are willing to wait between one and three months.

## **6. Timely Interaction, Particularly Personal Engagement, Remains Valuable**

Personal connection with an institution, and by extension the school's people and community, remains a key factor in enrollment decisions. Proximity to campus is the most important factor, with 23% of respondents identifying that living near the school was their biggest factor. Personal engagement with staff and the community was also cited as influential, with 19% of all student populations citing conversations with staff as the most influential factor. Other key factors included events (in-person or online) and communication via email as well as social media and community members.

## **7. Understand the Differences Between Student Populations**

While there is value in understanding that the demands, preferences and motivations for Modern Learners are converging, there remain many valuable and important differences between those students enrolling in traditional on-campus programs and those choosing what has previously been defined as non-traditional pathways like online learning and alternative credentials. It is important to understand where those differences persist and the value they provide in the student decision-making process.

Most students enrolled in traditional on-campus programs, either as on-campus residents or commuter students, continue to follow traditional application and enrollment patterns. However, the differences in their preferences and behaviors are not as pronounced as one may expect.

Traditionally enrolled students are more likely to accept longer admissions decision timelines, with 52% willing to wait one to three months for an admissions decision. While half of traditional students enroll at the first school that accepts them, this is far lower than the percentage of non-traditional on graduate students enrolling with the first-to-admit school. Traditional students are also more likely to consider more schools; although most strongly consider four or fewer schools.

Once enrolled, the work-life balance for traditional students also remains distinct from those enrolled in non-traditional and graduate programs. As one would expect, they have



far less work experience, with 68% of respondents citing two or fewer years of work experience. Additionally, traditional students are less likely to work, either full or part-time, with only 11% responding that they work full time and 38% of traditional students reporting they are not currently employed. This is in stark contrast to the 50% of non-traditional undergraduate and 53% of graduate students reporting that they work full time while balancing their studies.

Whether enrolled in traditional, online, hybrid or other program, studying as undergraduates or graduates, Modern Learners demand a change to the status quo that is currently found in higher education. Modern Learners are the architects of their own educational journeys, prioritizing flexibility and accessibility over traditional academic experiences. They seek value, outcomes and authenticity from institutions; and elect to engage with, and enroll at, institutions that deliver experiences that meet their needs.



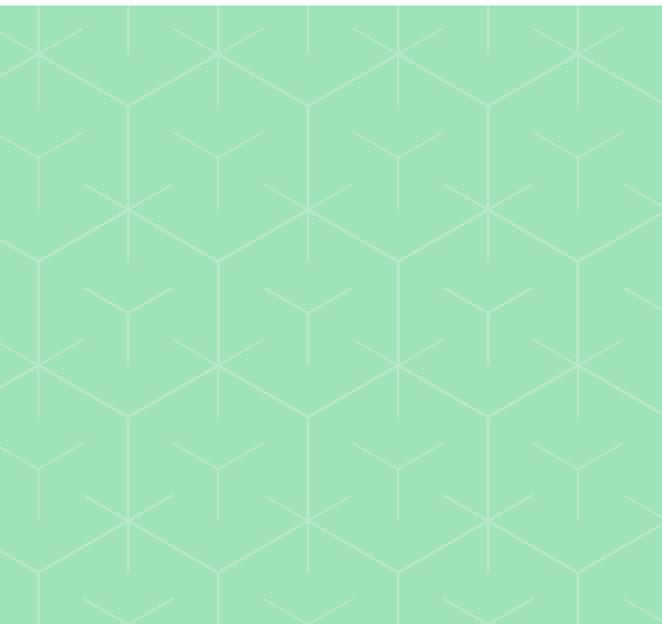
# Methodology

A survey of Modern Learners was conducted at the commencement of the 2024-2025 academic year. This survey was conducted online, using a national research panel. Surveys were conducted in October and November of 2024. Participants were incentivized for their participation.

3,422 Modern Learners were surveyed to collect the below data. Of which,

- 2,080 were undergraduate Modern Learners
  - o 495 were traditional undergraduate students (ages 18-22, enrolled in fully classroom study, either as a commuter or residential student)
  - o 1,585 were non-traditional undergraduate students (enrolled in online, hybrid, low residency study at any age or 23 and older enrolled in classroom-based study)
- 1,342 were graduate student Modern Learners (enrolled in graduate study in an online or hybrid program)

Additionally, references are made to fully online students, defined as those who studied in a fully online program.





# 10-year Data: A Comparison

As we broaden our focus from the online college student to the more inclusive category of Modern Learners, we can gain valuable insights by comparing results of our 2015 survey of online students and the subset of Modern Learner online students responding to our 2025 survey. The data will allow us to look back at the past decade and see what has changed about the online student population. Note that for these comparisons, EducationDynamics researchers focused on the 2025 respondents that indicated enrollment in online programs. This enabled direct comparisons between the 2015 Online College Student sample and this 2025 report.

Due to access to information and technological advances, rapid response has become increasingly more important over the past 10 years. While not congruent, in 2015, just 43% of fully online learners who enrolled indicated that they would enroll at the first school that contacted them (note, not admitted, just contacted.) However, in 2025, nearly 3 in 4 fully online respondents indicated that they would enroll at the first school that admitted them.

Program search habits have changed over the past decade. In 2015, 13% of fully online respondents indicated that they would initially search for the institution of interest. Just over 60% of fully online students in 2015 sought the program of interest initially, while 25% sought the school and subject information at the same time. However, in 2025, about 60% of online learners sought schools first. This was followed by subjects (in a binary choice.) A school's brand and reputation has become increasingly important and indicates that Modern Learners are more aware of schools than they were just 10 years ago.

Student engagement with website chatbots and on-demand engagement platforms has increased significantly over the past decade. In 2015, about 15% of online students indicated they utilized website chatbots or live chat agents. This number has doubled, reaching 30% usage among fully online learners in 2025.

Most importantly, however, is how schools serve students. At least in the case of online students, this has improved. In 2015, only 32% of fully online respondents indicated that they



thought their online education was better than their previous classroom study. However, 71% of today's online learners indicated they preferred their online higher education when compared to classroom education.

Additionally, the last decade included a massive disruption to higher education. Firstly, 300 new CIP code or program areas were added in 2020<sup>1</sup>. Additionally, online and distance learning has grown significantly. From 2014 to 2023, the last 10 years of data available, those enrolled in exclusively online learning at the undergraduate level increased by 97% (1,866,070 students) at fall enrollment. Additionally, the number of undergraduate students who enrolled in at least one online or distance course increased by 89% (2,319,489) at fall enrollment. Moreover, the number of students who enrolled in online/distance undergraduate study in a different state increased by 56% (386,692) at fall enrollment. The same trend was observed at the graduate level. There was also an 86% increase (593,554) in graduate students who enrolled in exclusively online/distance programs. Students enrolled in at least one online graduate course increased by 123% (270,527). Again, out-of-state distance study also increased significantly by 74% (272,949) among graduate students.<sup>2</sup>

Massive changes were seen at the certificate levels as well. According to IPEDS, from 2014 to 2023, the latest 10 years available, there has been a 13% rise (134,461) in certificate completions across all levels of study. Additionally, more than 800 institutions that did not report offering certificate programs in 2014 reported certificate completions in 2023.

While the bulk of this report focuses upon the full Modern Learner population, the longitudinal 2015-2025 data provides a comprehensive look at the evolution of the online student population over the past decade and thus sets the stage for today's Modern Learner (over half of whom, across all populations, studied in a fully online program). The comparisons between the 2015 and 2025 surveys highlight significant changes in enrollment timelines, the importance of contact speed and shifts in program search habits. Most notably, the perception of online education has improved dramatically, with a significant increase in the number of students preferring online learning over traditional classroom settings. These insights underscore the dynamic nature of the Modern Learner and the ongoing advancements in online education.

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- 1 Introducing the 2020 Classification of Instructional Programs (CIP) and Its Website, <https://nces.ed.gov/blogs/nces/post/introducing-the-2020-classification-of-instructional-programs-cip-and-its-website>
  - 2 NCES/IPEDS fall enrollment 2024-2023, <https://nces.ed.gov/ipeds/datacenter/InstitutionByName.aspx?goToReportId=1&sid=69904bf6-f3b4-40e6-9f1f-c3b4ed92d1b1&rtid=1>



# Addressing Stop Out and Some College, No Credential Audiences

## Reason for Re-Enrolling

Career-related reasoning is the main factor in re-enrolling in study, followed by financial situation change, across all subsets of the Modern Learner population.

Reason for Re-Enrolling

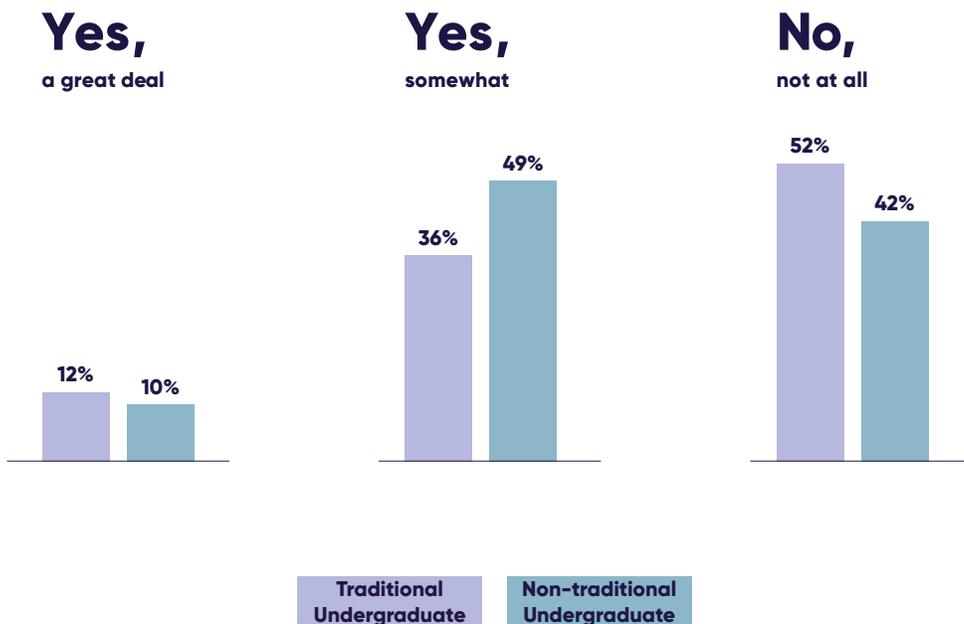
	Traditional Undergraduate	Non-traditional Undergraduate	Graduate	Total
 I want to start a new career	37%	28%	23%	27%
 My financial situation changed	18%	18%	18%	18%
 I need the skills to stay competitive	11%	11%	12%	11%
 I moved to a new city/location	7%	7%	10%	8%
 My living arrangements changed	11%	9%	8%	8%
 I/we had a baby	3%	7%	6%	7%
 I started a new relationship/ got married	3%	4%	3%	4%
 I was passed over for promotion/advancement due to lack of education	0%	3%	6%	4%
 I ended a relationship/divorced	3%	4%	4%	4%
 I got laid off/let go from my job	3%	4%	4%	4%
 My kids went to school/college	0%	2%	3%	2%
 Something else	7%	5%	4%	5%



# Impact of Previously Earned College Credit on Enrollment Decision

When considering the impact of previously earned college credits on their enrollment decision, more than half of undergraduate Modern Learners who have stopped out indicated that the credit transfer decision impacted their enrollment decision. However, there is divergence among the undergraduate Modern Learner subset. Credit transfer is more important to non-traditional undergraduate students than it is to traditional undergraduate students.

## Impact of Previously Earned College Credit on Enrollment Decision



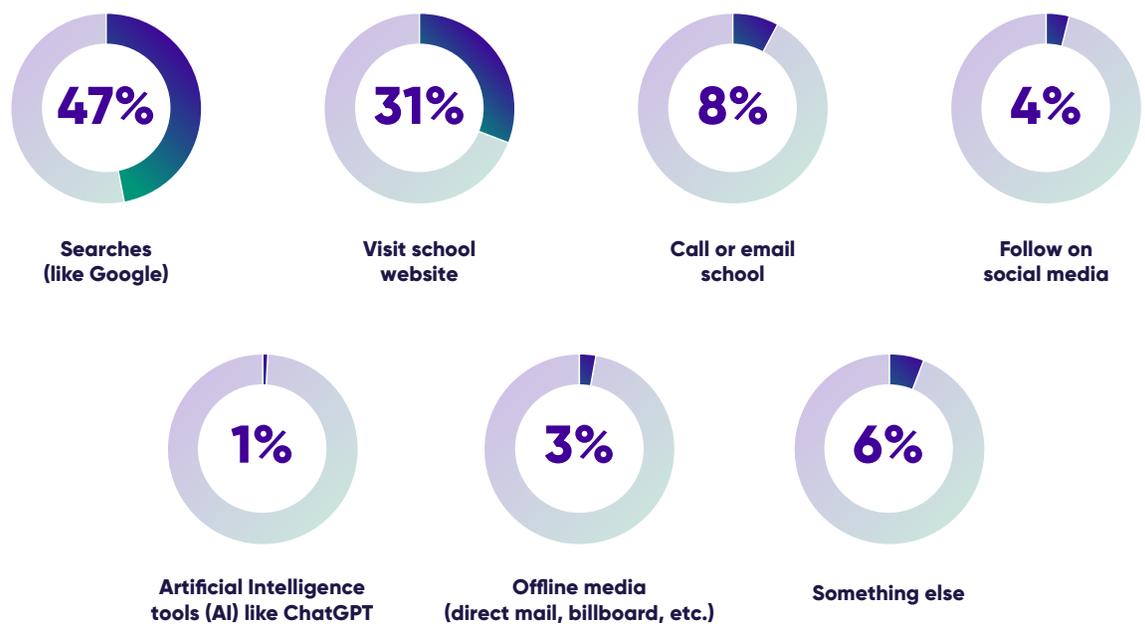


# Enrollment Process and the “Messy Middle”

## Earning a Place in the Consideration Set

When Modern Learners begin their school selection process, nearly half (47%) start with online searches, such as using Google, and another 31% indicated they visit school websites. This is true across all Modern Learner subsets.

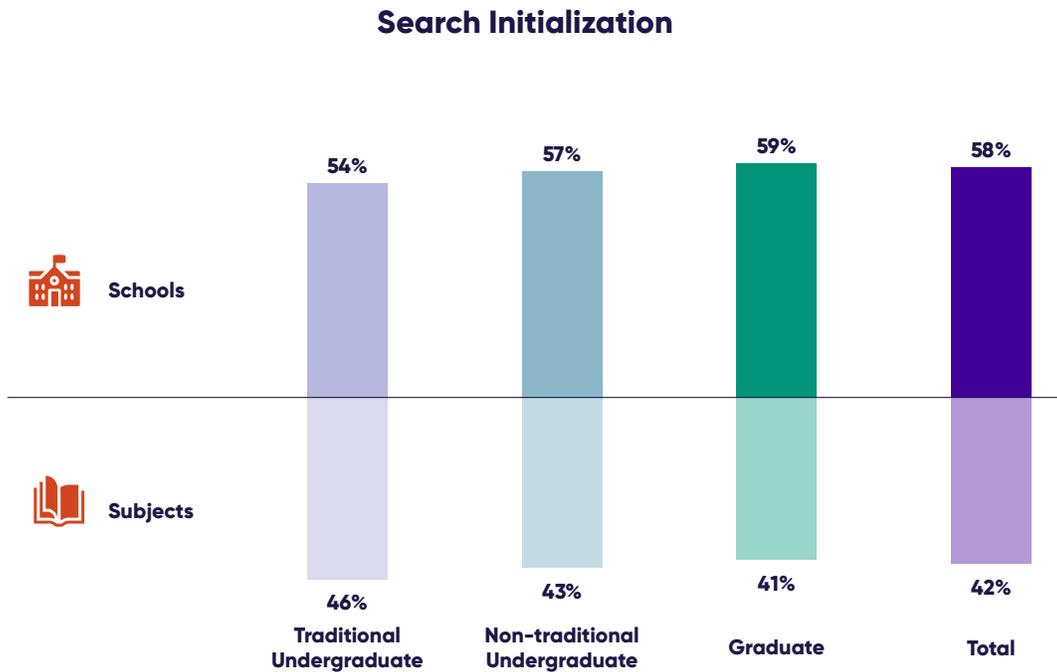
### How Modern Learners Start Their Research





# Search Initialization

The majority of respondents (58%) initiate their search by looking for schools. About 60% of online learners sought schools first. This was followed by subjects (in a binary choice).





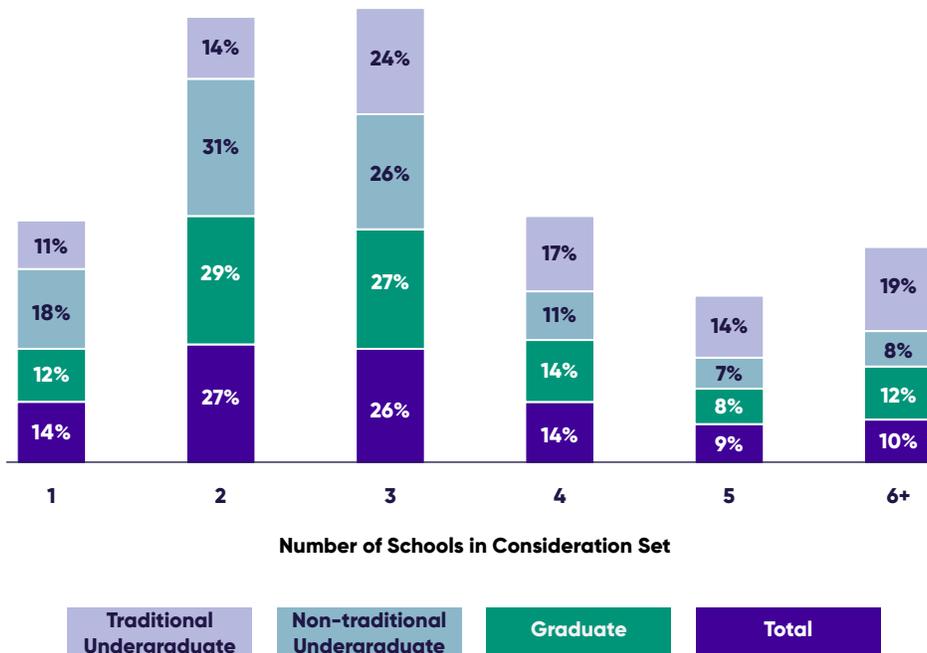
# Initial Consideration Sets and Inquiries

In the initial stages of the enrollment process, respondents were asked to identify the number of schools they considered before making any inquiries. The data reveals that a significant portion of respondents considered a relatively small number of schools. Specifically, 41% of respondents, including the undergraduate and graduate Modern Learner subsets, had an initial consideration set of two schools or fewer.

Traditional undergraduate Modern Learners have a larger initial consideration than general undergraduate Modern Learners. Moreover, while only three percent of undergraduate Modern Learners considered 10 or more institutions, seven percent of traditional undergraduate students considered 10 or more institutions.

Traditional undergraduate students apply to a median of 3 schools while the undergraduate Modern Learner applies to between 1 and 2 schools. The traditional undergraduate learner is also more concerned with college reputation in determining where to apply. While 32% of modern undergraduate learners cited overall reputation of college as a determinant factor on where to apply, 51% of traditional undergraduate respondents cited this as a reason.

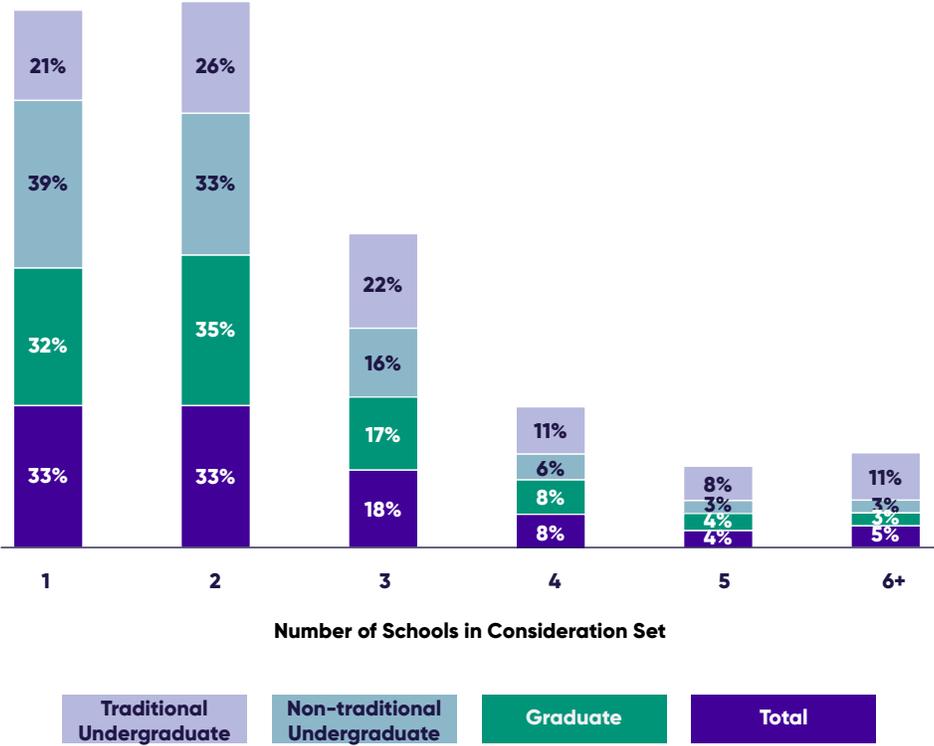
### Initial Consideration Set Prior to Inquiries





The number of schools at which respondents actually inquired is notably reduced compared to the initial consideration set. A significant 33% of respondents inquired at only one school. This pattern indicates a narrowing of choices as the consideration process progresses. This is consistent across both undergraduate and graduate respondents. Traditional undergraduate students maintain a larger set of schools at which they will inquire.

### Number of Schools Initially Inquired

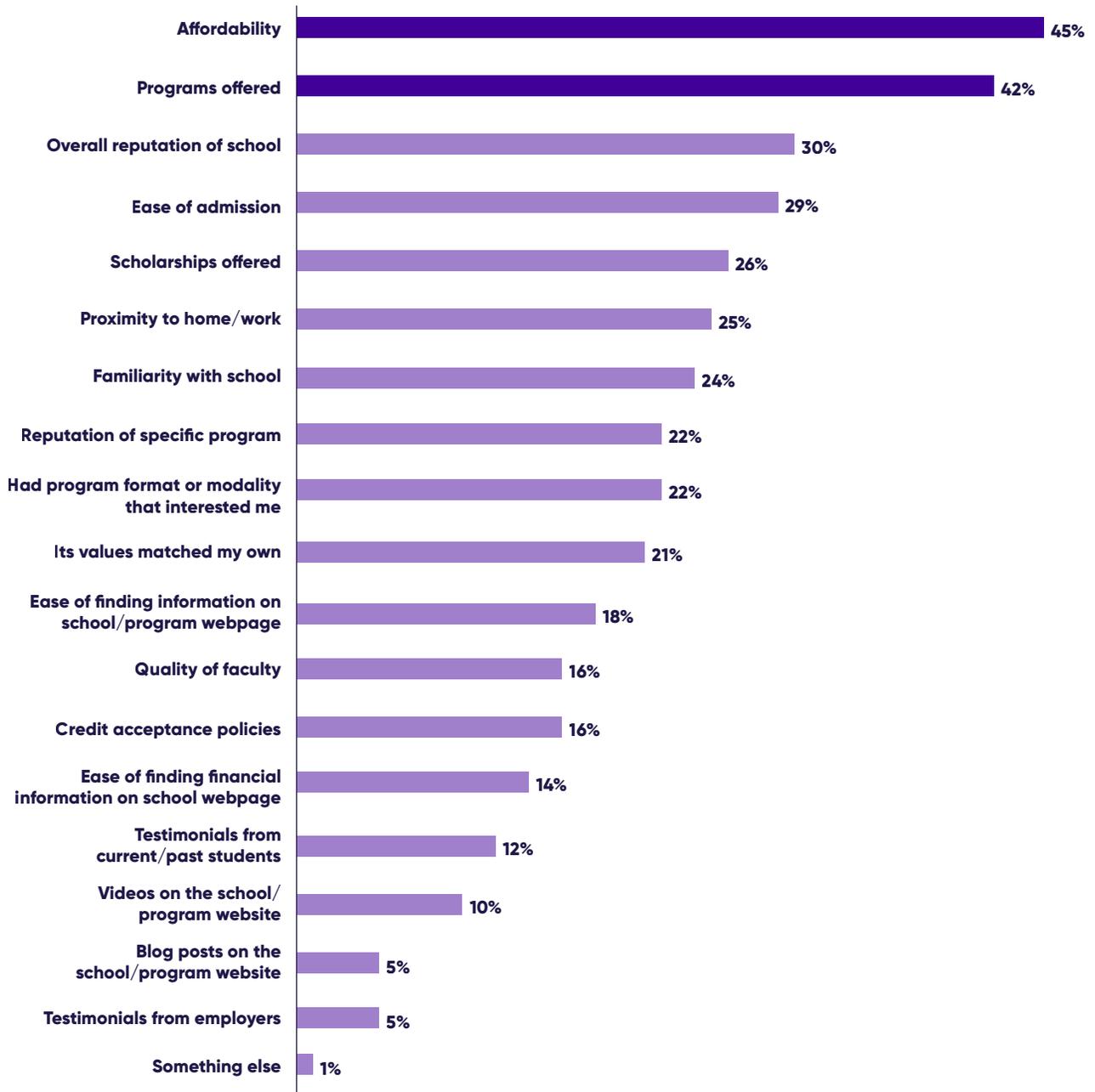




# Reason for Inquiries

Modern Learners inquire about schools for various reasons, with affordability being the most common factor (45%). “Programs offered” is the second most common reason (42%). These reasons are important to all subsets of the Modern Learner.

**Reason for Inquiries of All Subsets of Modern Learners**

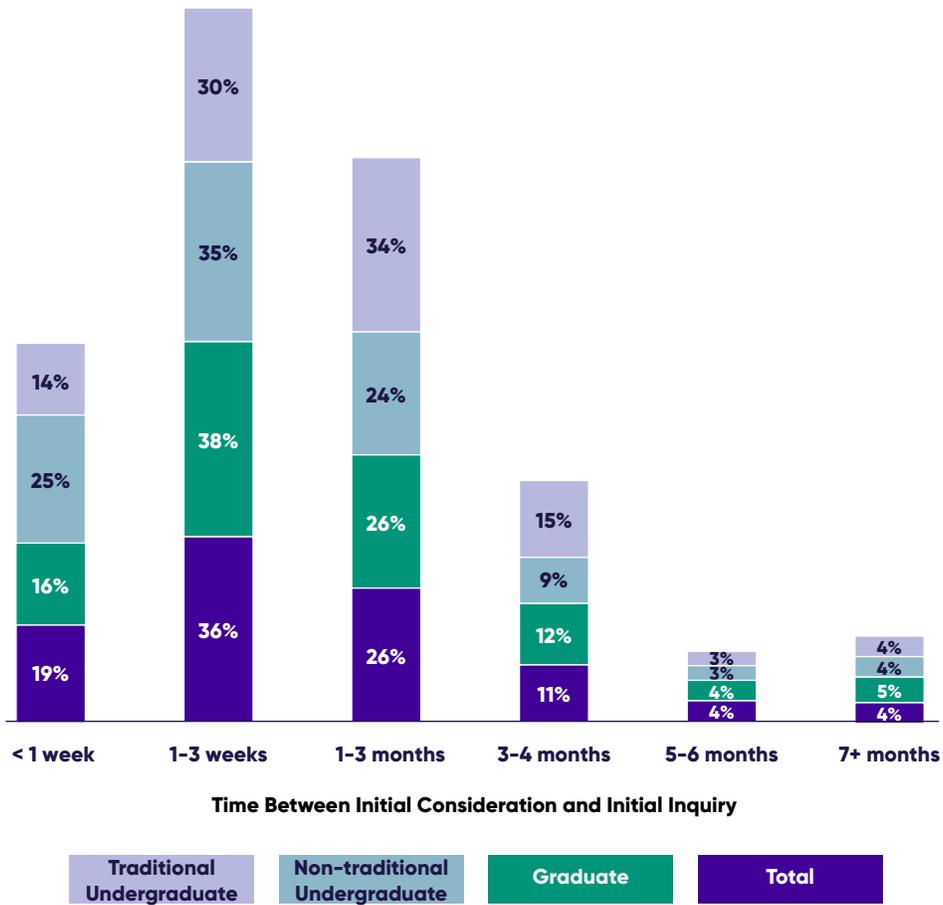




# Time Between Building Initial Consideration Set and Initial Inquiries

Across undergraduate and graduate Modern Learners, students generally take fewer than 3 weeks between building a consideration set and making their initial round of inquiries, with 20% of undergraduate Modern Learners doing so within one week. While this holds across the bulk of Modern Learner subsets, 34% of traditional undergraduate students take slightly longer to make inquiries (1-2 months).

**Time Between Building Initial Consideration Set and Initial Inquiries**

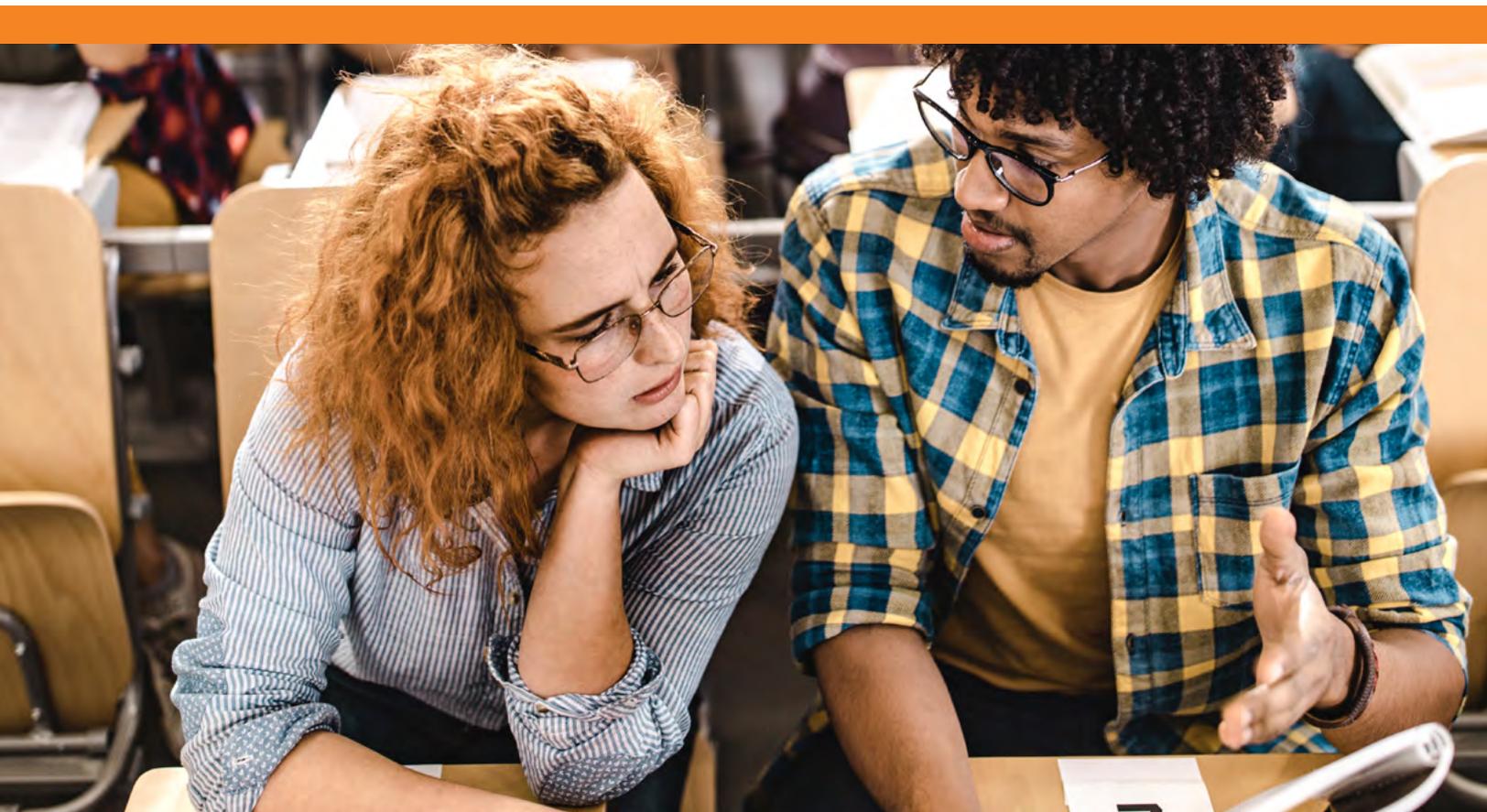
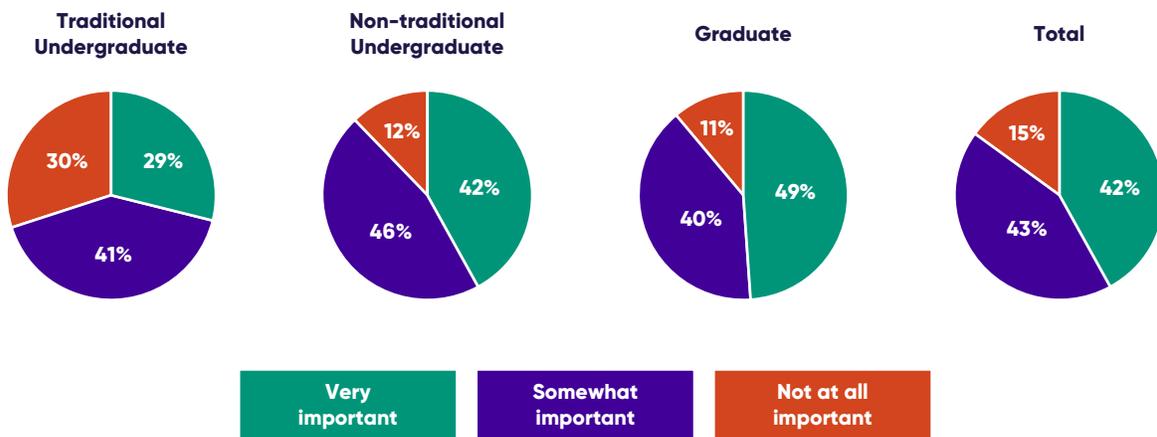




# Importance of Start Date

Having a program start date within 1-2 months is very important for 42% of respondents. This urgency is particularly pronounced among graduate students, with 49% rating it as very important, compared to 37% of undergraduates. The time for matriculation is less important to traditional students, which is consistent with their longer enrollment timelines. Specifically, 30% of the traditional undergraduate subset said that seeing a start date within 1-2 months was not at all important.

## Importance of Start Date

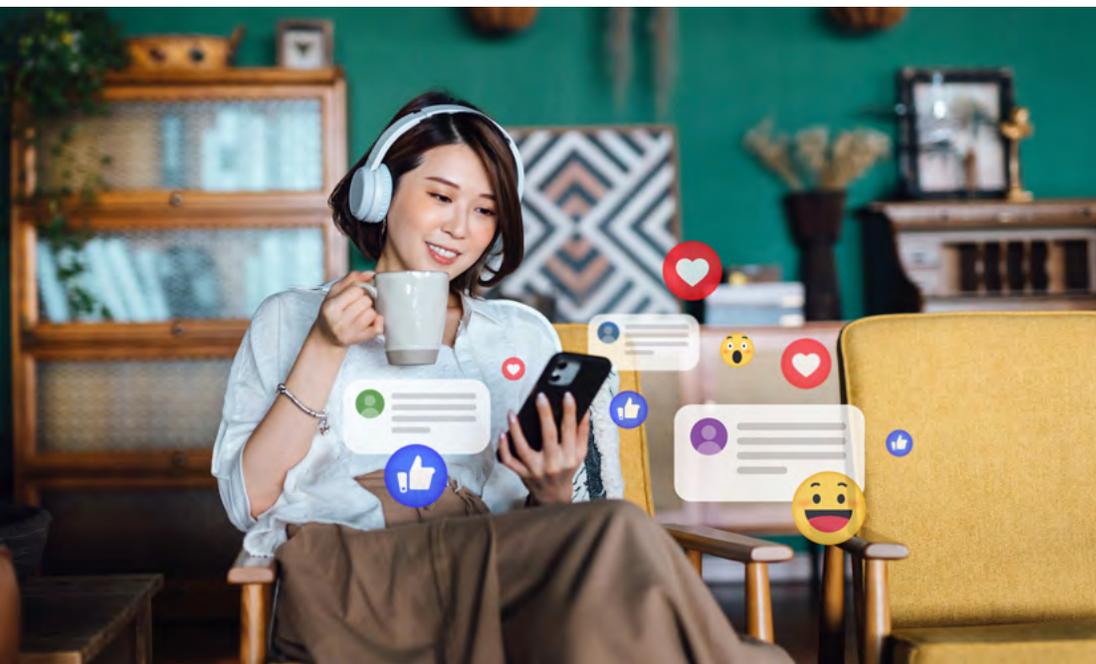
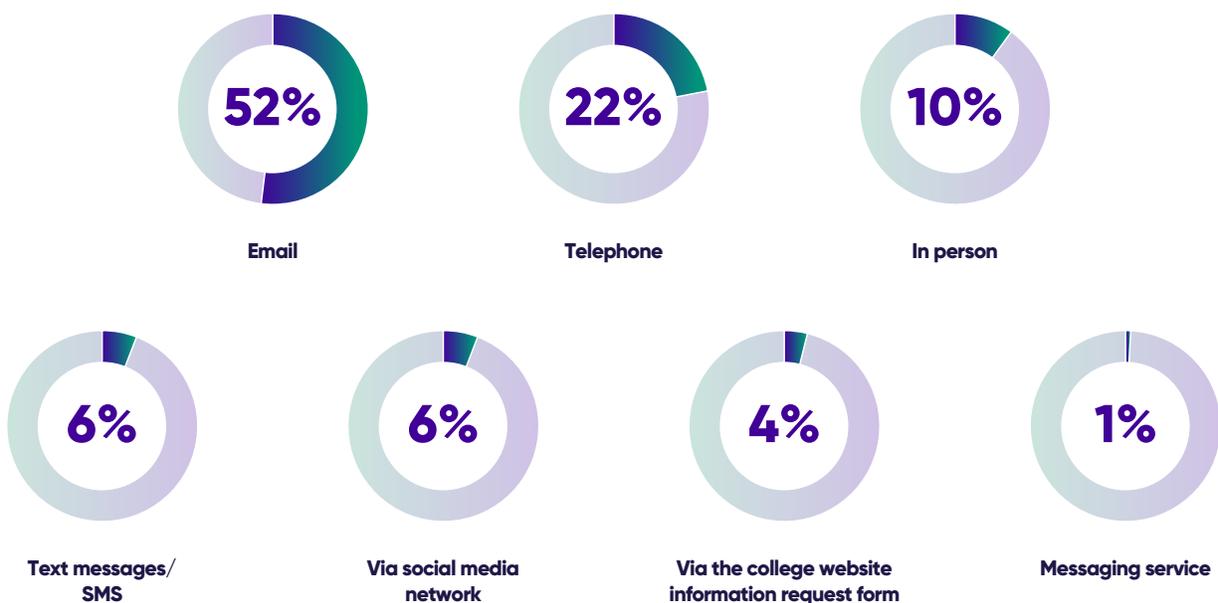




## Preferred Method of Contact

The preferred method of contact for Modern Learners remains email (52%). However, it is notable that traditional students prefer email at a higher intensity, while other Modern Learner subsets prefer telephone contact more than the traditional undergraduate student.

### Preferred Method of Contact

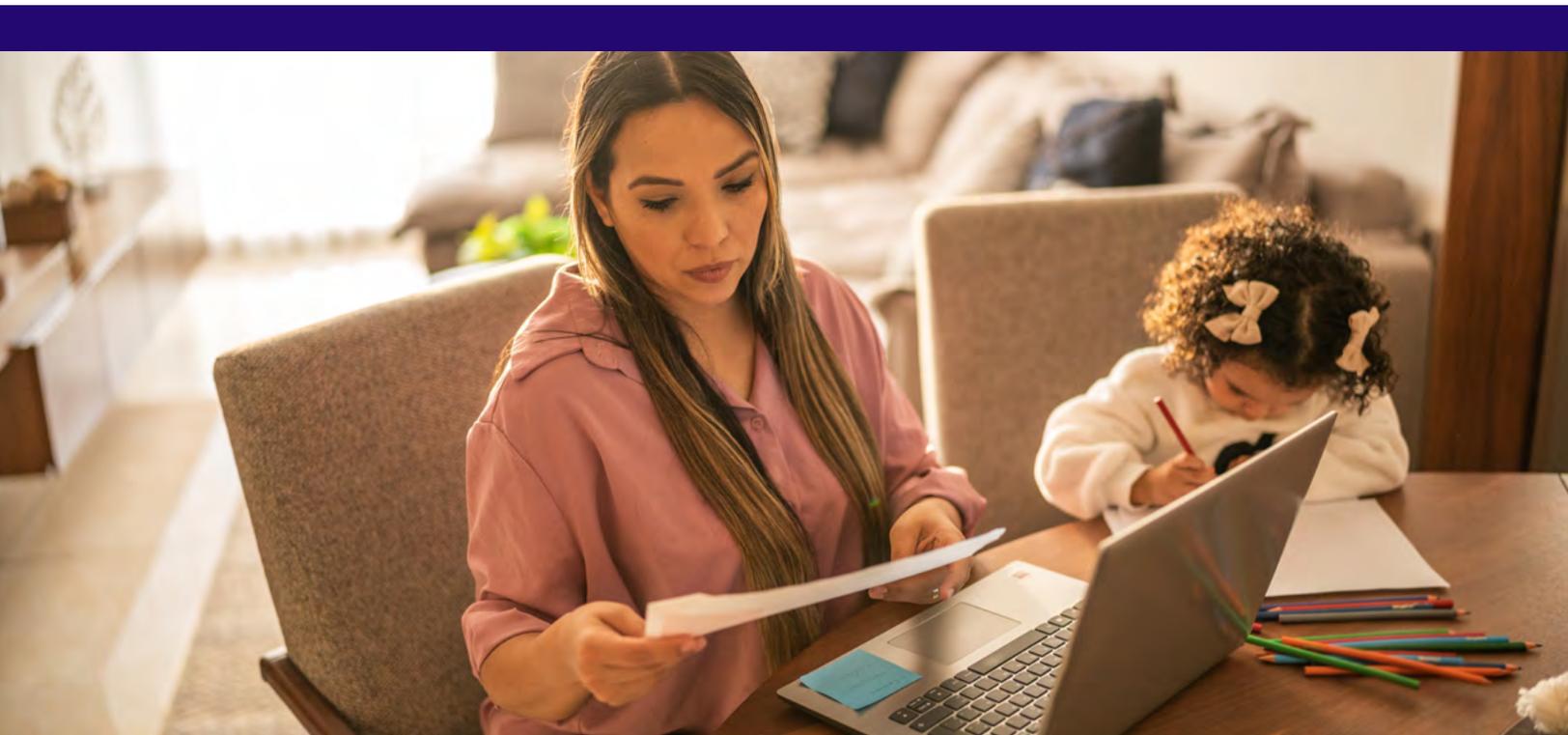
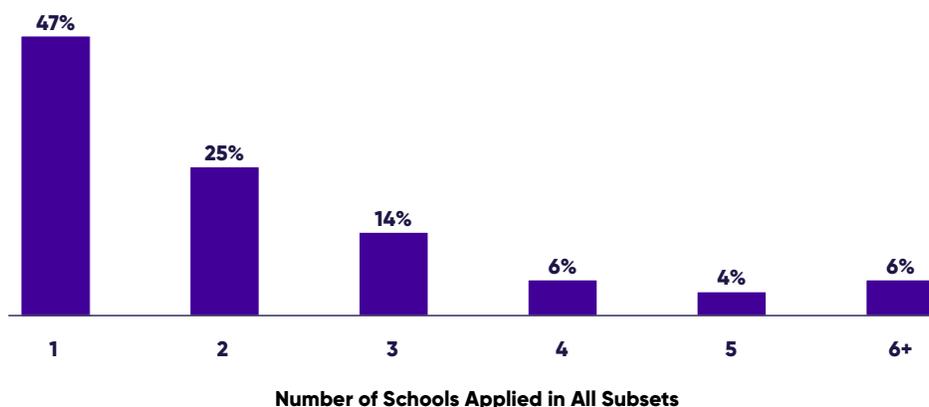




## Number of Applications Submitted

When examining the number of schools to which respondents applied after making inquiries, the data indicates a highly selective approach. A significant 47% of respondents applied to only one school. While non-traditional and graduate Modern Learner populations applied at a very small number of schools, traditional undergraduate students applied to a larger number of schools.

**Number of Schools Applied**

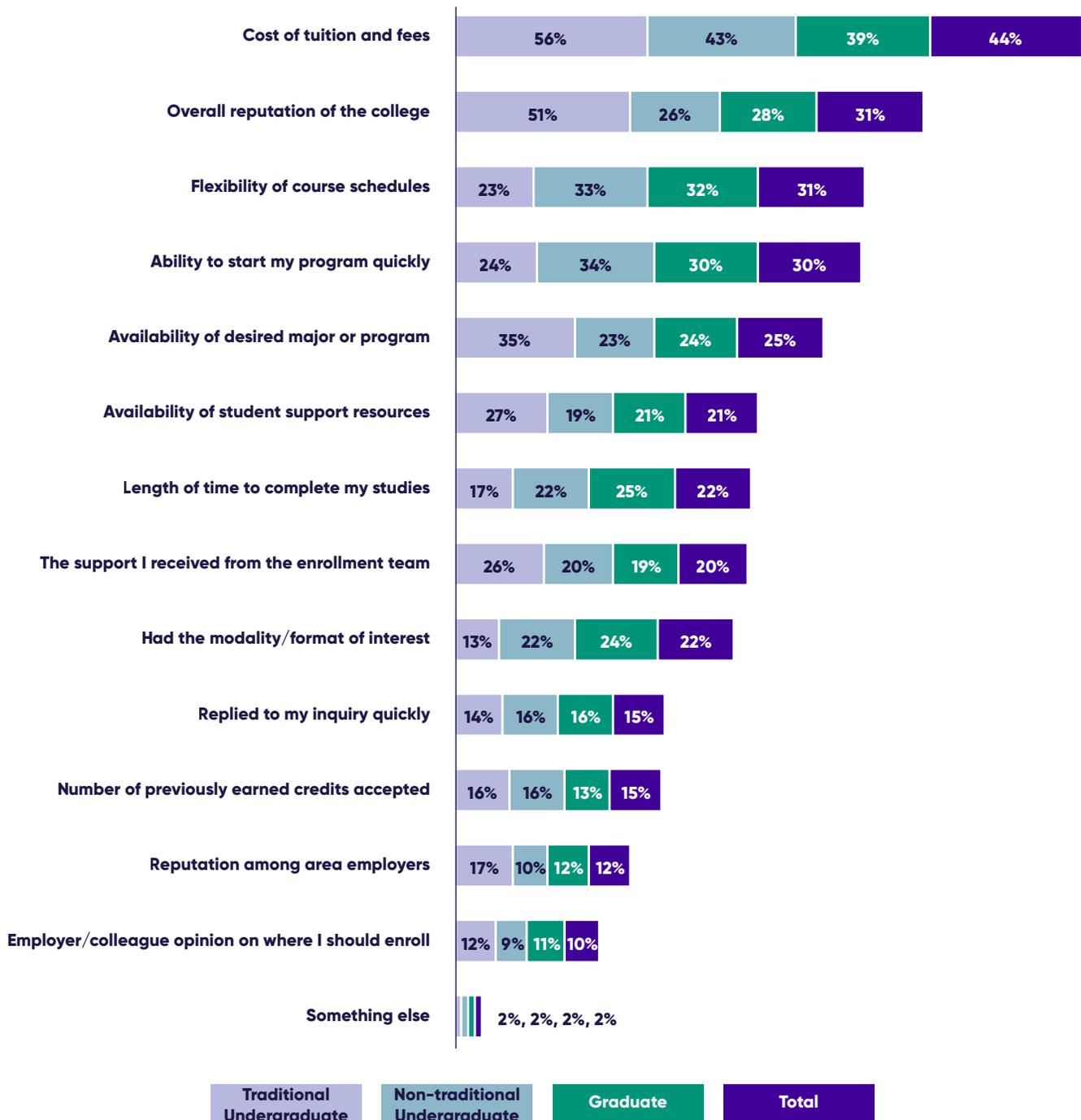




# Reason for Applying to Schools

The most common reason for applying to schools is the cost of tuition and fees (44%), with a higher percentage among undergraduates (47%) compared to graduates (39%). However, schools can promote value propositions that mitigate cost factors to attract Modern Learners. Other reasons include overall reputation of the college (31%), flexibility of course schedules (31%), ability to start the program quickly (30%) and availability of the desired major or program (25%).

### Reason for Applying to Schools

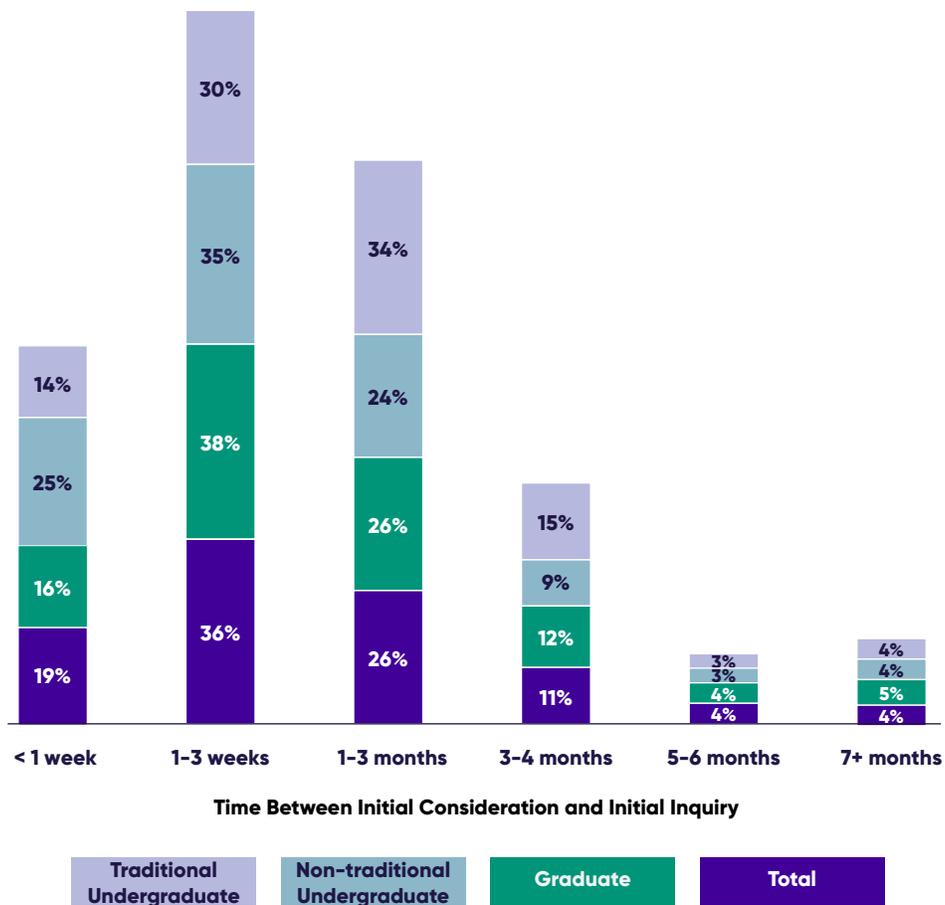




# Consideration Timing to Application Decision

Modern Learners are decisive in their application decision-making. Over 50% of both undergraduate and graduate Modern Learners decide to which schools they will apply within three weeks. However, traditional undergraduate Modern Learners take more time. This is a trend seen throughout the data, as traditional students have a longer communication cycle than their non-traditional undergraduate counterparts.

### Time Between Building Initial Consideration Set and Initial Inquiries





## Enrolled at School That Admitted First

Among Modern Learners, 68% enroll at the school that admitted them first, Graduate students (73%) are more likely to enroll at the school that first admits them. These data indicate that not only is it of critical importance for schools to respond rapidly, they must also have an optimized application and admission experience so applicants receive admissions decisions at the same pace.

Traditional undergraduate students are more deliberate with their final enrollment decision. While 65% all undergraduate students enrolled at the first school that admitted them, only 50% of the traditional undergraduate subset did the same.

### Enrolled at School That Admitted First

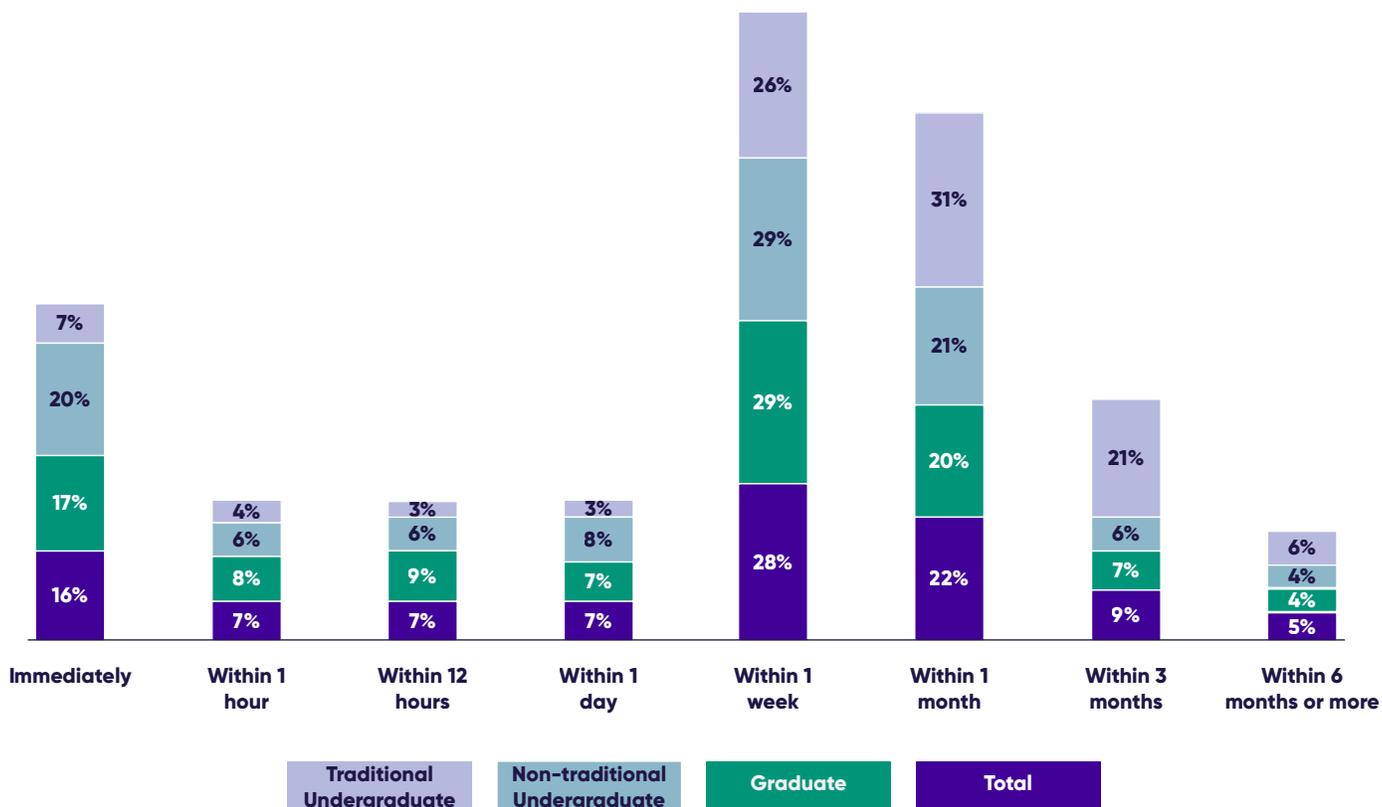




# Expected Time to Admittance Decision

The majority of Modern Learners expect admittance decisions within one week of their application. However, traditional undergraduate students expect a longer wait time for their admittance decision, with as 52% expecting 1 to 3 months.

### Expected Time to Admittance Decision

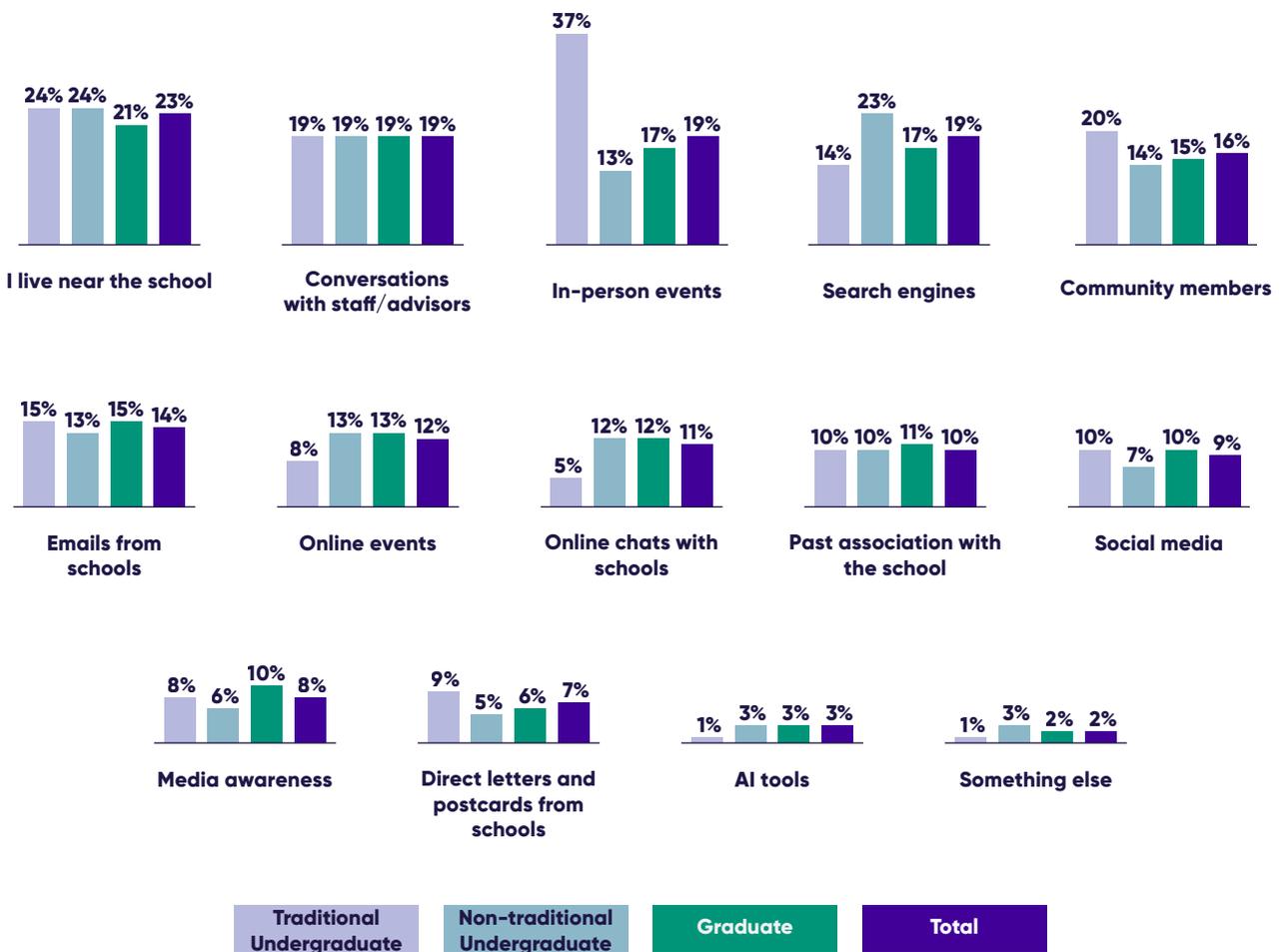




# Most Influential in Selecting a School

The most influential factor for Modern Learners selecting a school is living near the school (23%), highlighting both the need to be top of mind among students and how students begin their search. Traditional undergraduate Modern Learners seek interactive experiences with 37% influenced by in-person events; 20% higher than any other Modern Learner subset.

## Most Influential in Selecting a School

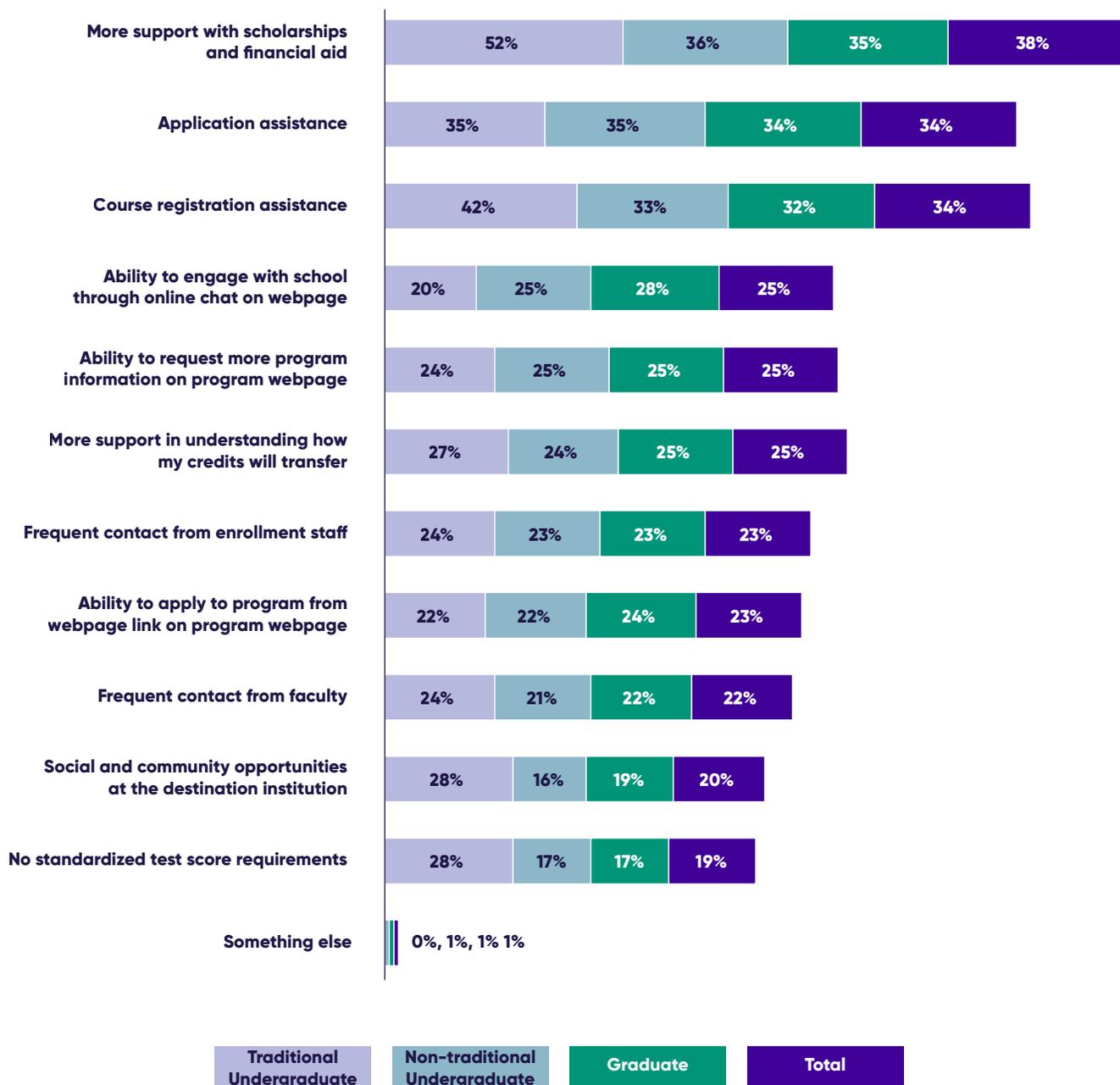




# Helpful Factors in Enrollment Process

Modern Learners find several factors helpful in the enrollment process. The most common factors include more support with scholarships and financial aid (38%). As many undergraduate Modern Learners bring previously earned credits, 25% seek help in understanding credit transfer policies. Additionally, while all respondent groups found that more support in scholarships and financial aid was or would be most helpful, this was most pronounced in the traditional undergraduate subgroup.

**Helpful in Enrollment Process**



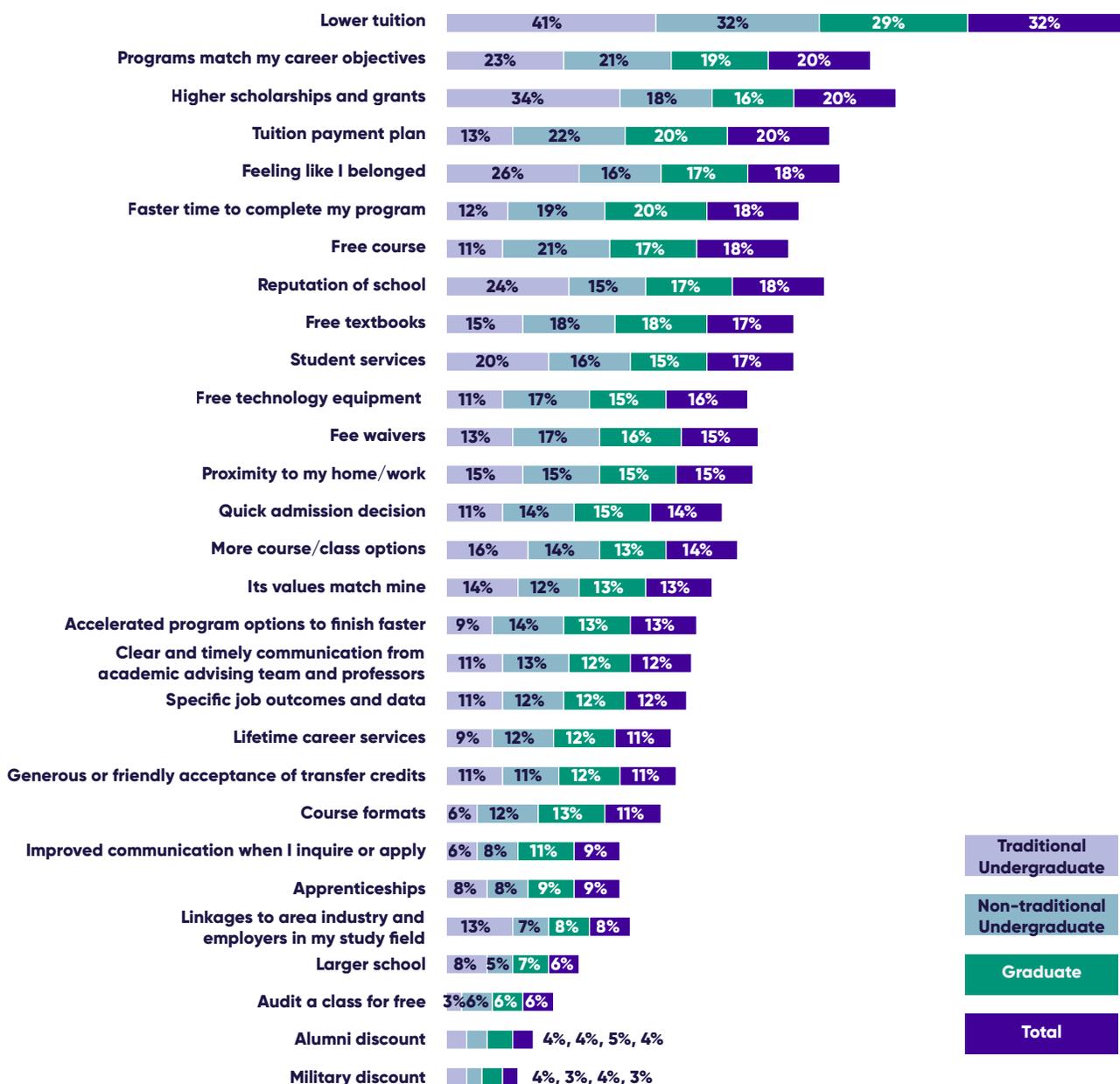


# Key Factors That Influence Enrollment Decisions

Cost remains a significant consideration for Modern Learners. Lower tuition was cited as the key factor that influenced enrollment decisions by all subsets of Modern Learners, with 34% of undergraduates and 29% of graduates indicating this as a key factor.

Programs that match career objectives were the next most commonly cited factor in influencing decisions. Twenty percent of all Modern Learners, and 23% of traditional undergraduate students, cited their program’s alignment with career objectives as an important factor in their decision-making process.

## Key Factors That Influence Enrollment Decisions

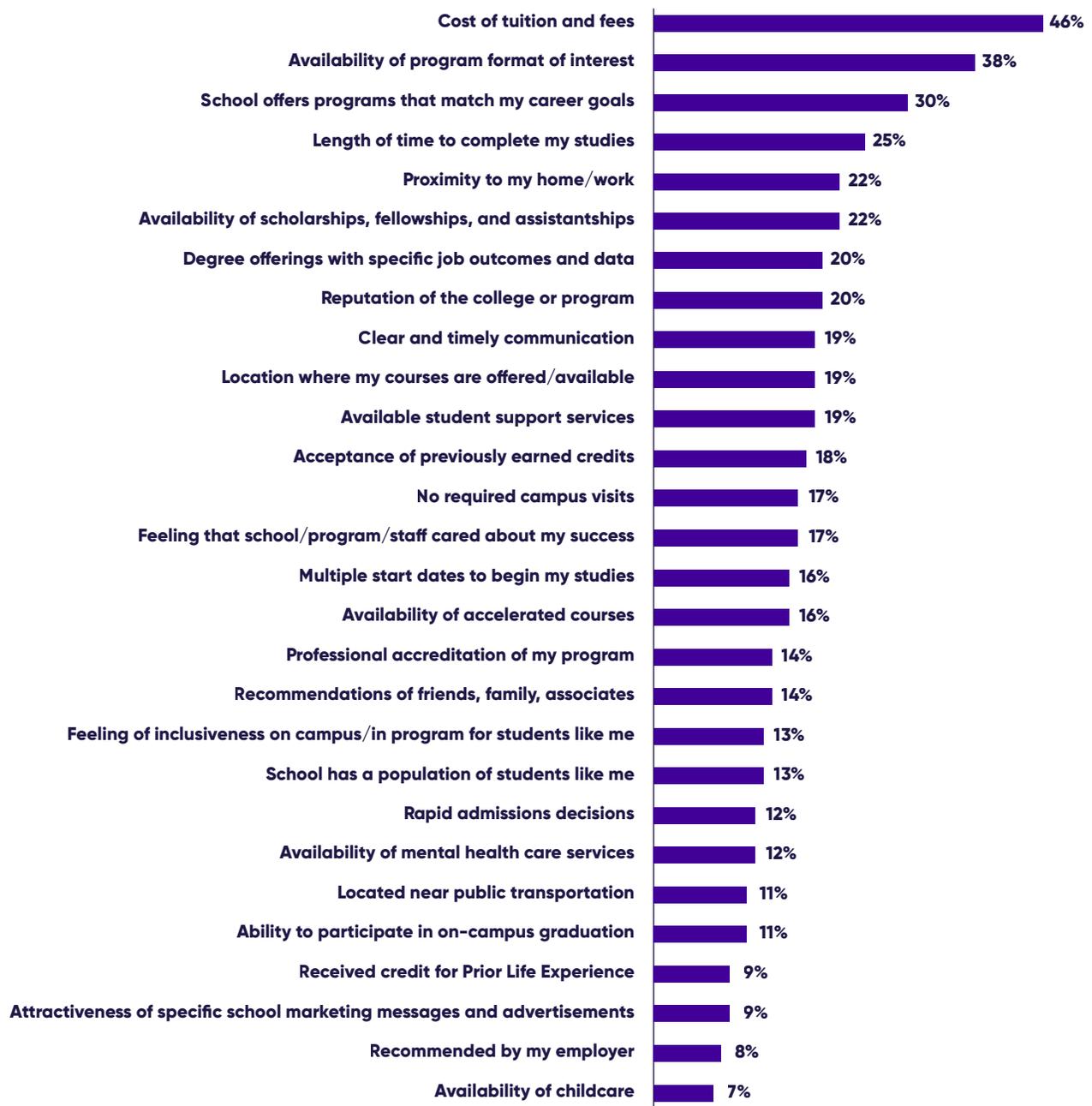




# Most Important Factors in Enrollment Decision

Overall, the cost of tuition and fees is the most critical factor for 46% of respondents when choosing a school, but again, other factors such as availability and career focus of programs are also important.

## Most Important Factors in Enrollment Decision

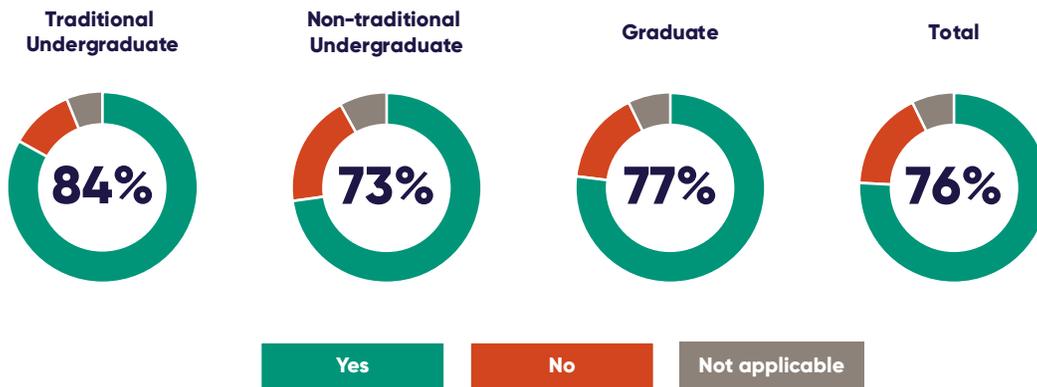




## Students Respond to Career Outcomes

A significant majority of Modern Learners (76%) reported that their current or intended institution explained or made obvious the careers that might be available from their program. However, schools are most adept at making this key piece of information known to traditional undergraduate students. Across all Modern Learner populations, 84% of traditional undergraduate students received this information, while only 73% of non-traditional and 77% of graduate students received this information. Given the importance of career motivations for all students, including non-traditional and graduate students, this information should be relayed to all Modern Learners.

### Students Respond to Career Outcomes



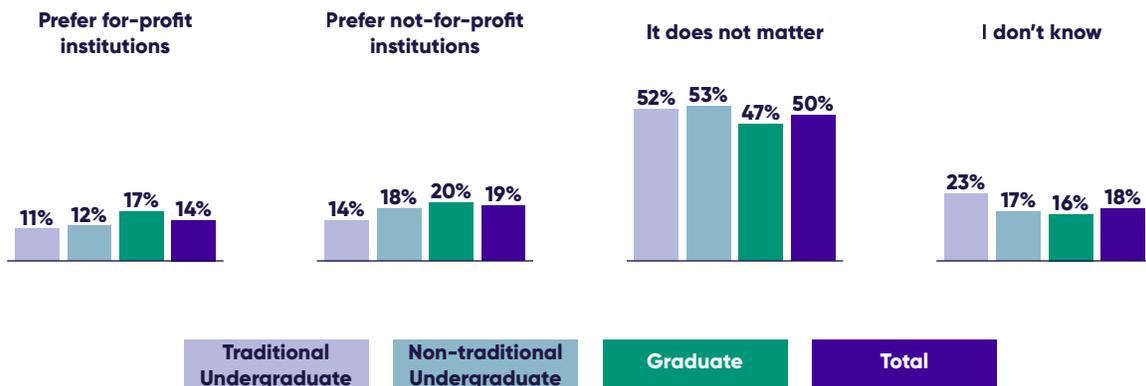


## School Sector Preference

Most Modern Learners (50%) did not indicate a preference between not-for-profit and for-profit institutions. The school's sector or tax status was important to 19% of all respondents.

Graduate students are far more aware of the type of institution at which they enroll. Nearly 10% more graduate students were able to state if they would rather enroll in a not for profit or for-profit institution when compared with undergraduate students.

### School Sector Preference

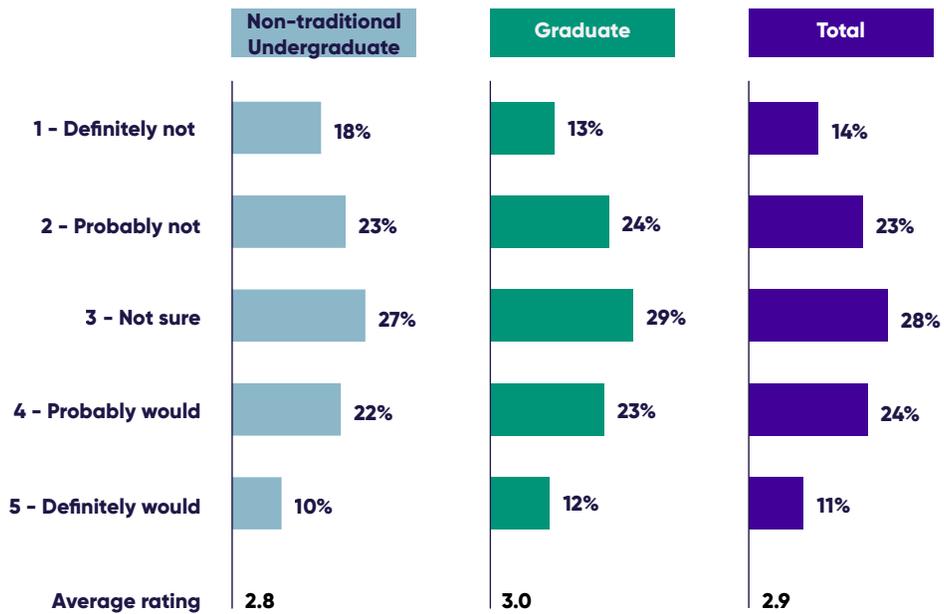




# Likelihood of Enrolling in a Classroom Program

Overall, 35% of distance-based (fully online, hybrid, low residency) respondents would probably or definitely enroll in a classroom program if a non-classroom format were unavailable.

## Likelihood of Enrolling in a Classroom Program

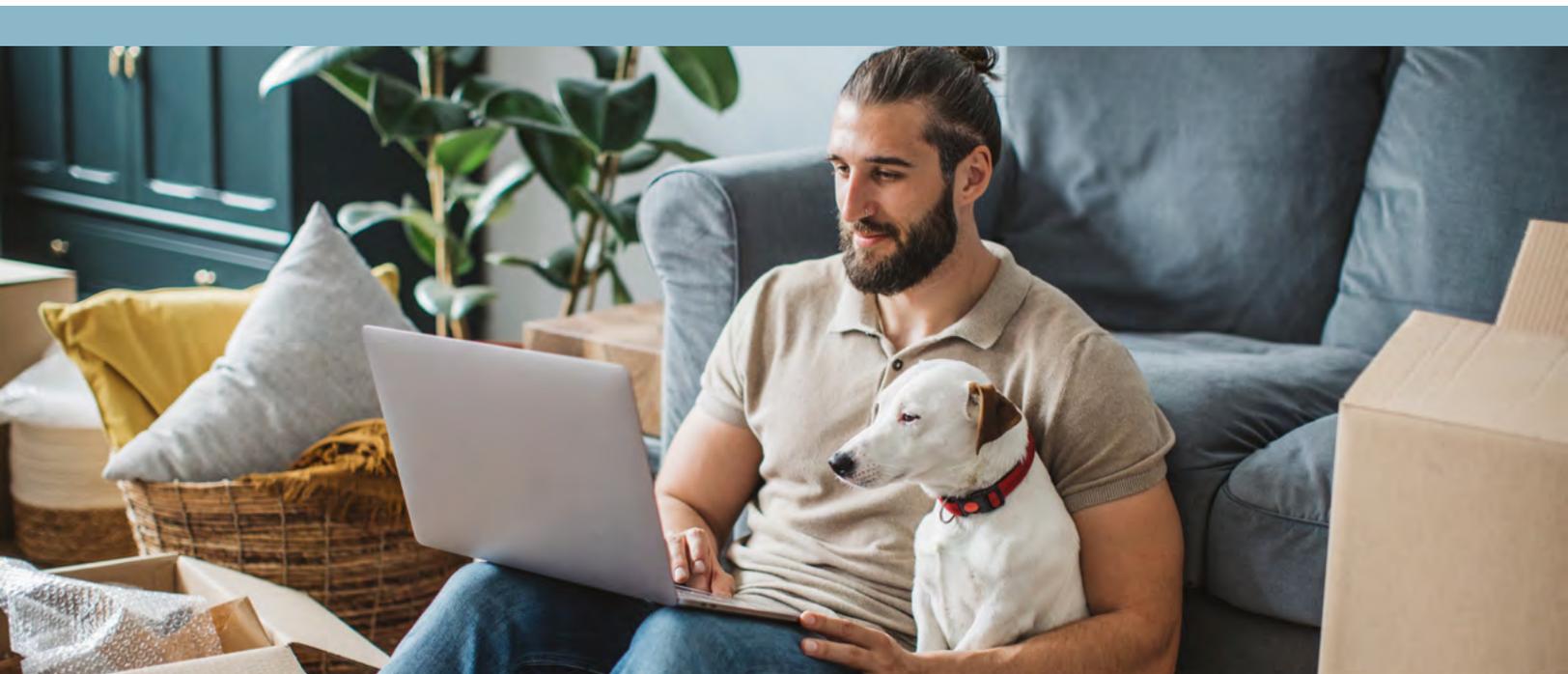
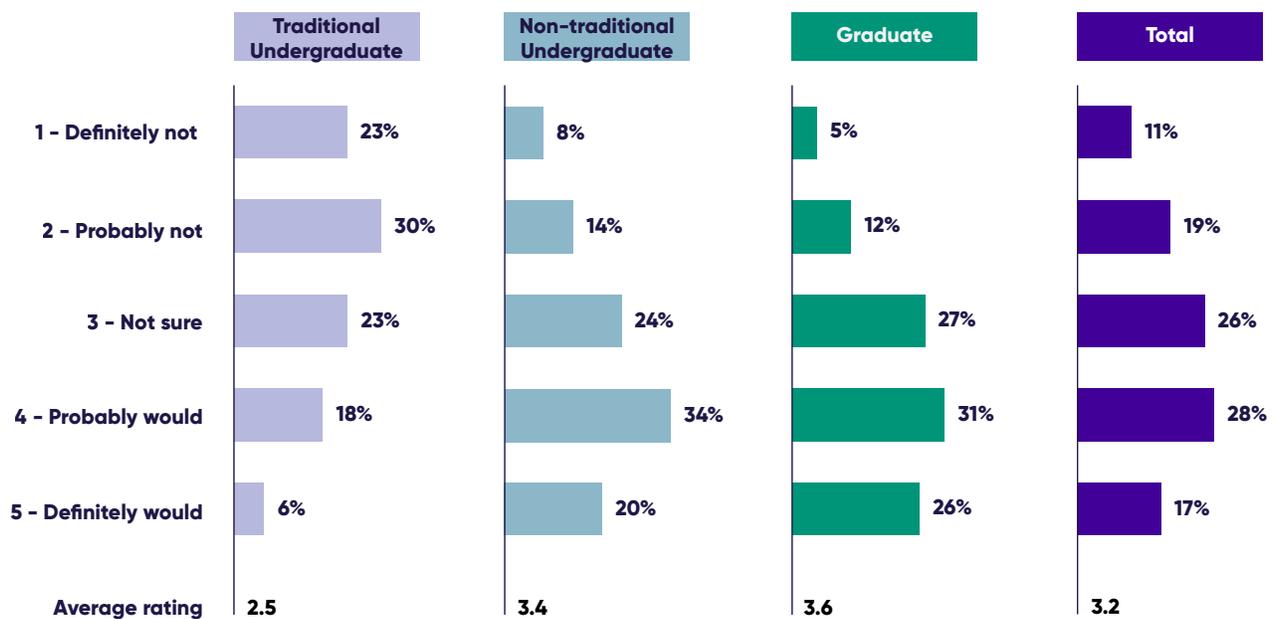




# Likelihood of Enrolling in a Fully Online Program

Among non-fully online students, 45% of respondents would enroll or probably enroll in a fully online program if a non-fully online program is unavailable. Note that nearly one quarter (24%) of traditional undergraduate students indicated they would probably or likely enroll in a fully online program if a classroom program were not available.

### Likelihood of Enrolling in a Fully Online Program

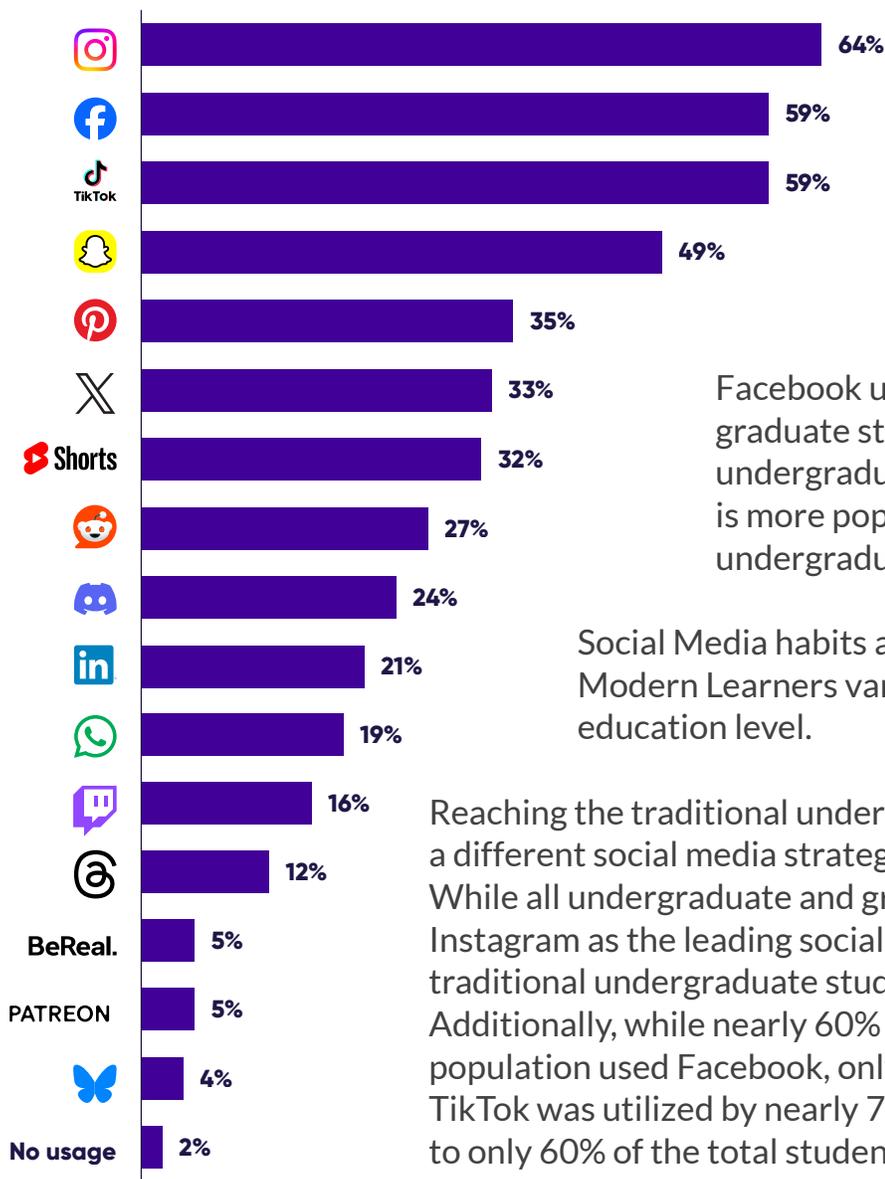




# Social Media Usage

## Social Media Platforms Used

Overall, Instagram is the most popular social media platform, used by 64% of respondents, led by traditional-focused Modern Learners (79%). Facebook and TikTok follow closely, with 59% each (with TikTok leading among traditional-focused students;69%).



Facebook usage is notably higher among graduate students (63%) compared to undergraduates (56%). Similarly, WhatsApp is more popular among graduates (23%) than undergraduates (17%).

Social Media habits across the various subsets of Modern Learners varied widely based largely on age and education level.

Reaching the traditional undergraduate Modern Learner requires a different social media strategy than outreach to other students. While all undergraduate and graduate Modern Learners, named Instagram as the leading social media platforms they used, the traditional undergraduate student is active on it 15% more. Additionally, while nearly 60% of the total Modern Learner population used Facebook, only 40% of traditional learners did. TikTok was utilized by nearly 70% of traditional learners compared to only 60% of the total student population.

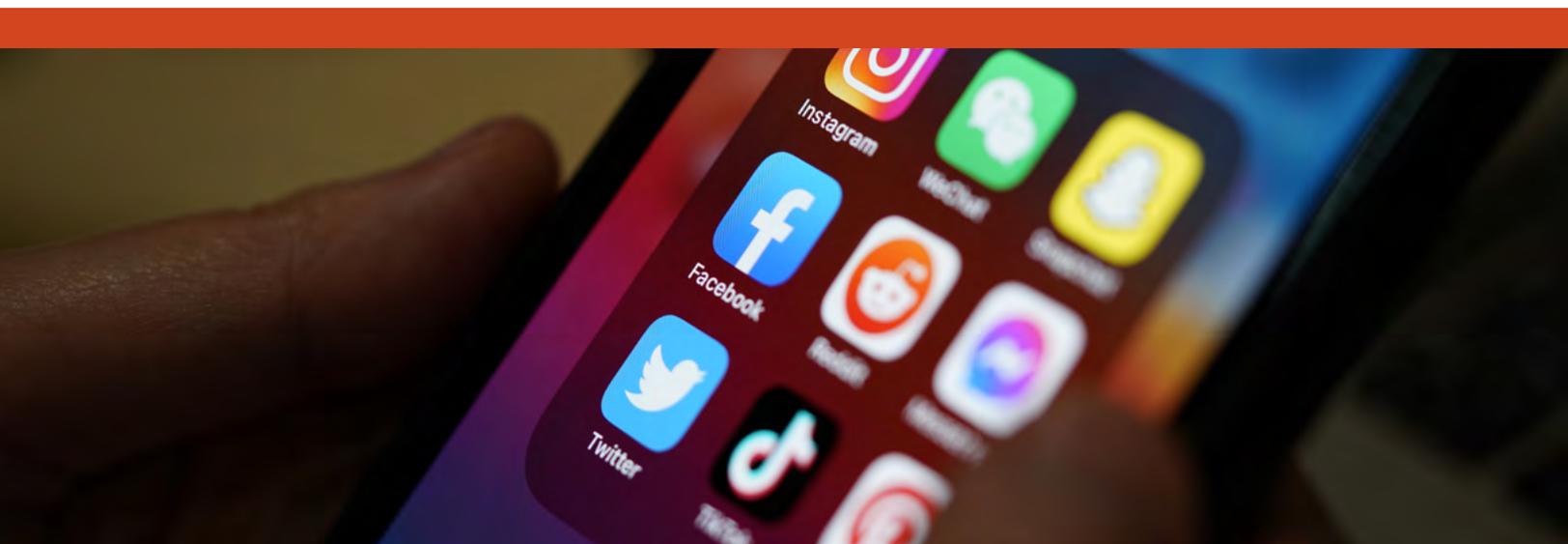


## Usage of Social Media Platforms

Among those who use each social media platform, TikTok has the highest daily active usage (75%). This aligns with its popularity, as 59% of respondents indicated they use TikTok. Instagram follows closely with 69% daily usage, reflecting its status as the most used platform (64%). Facebook also shows strong daily engagement at 68%, consistent with its high usage among both undergraduates (64%) and graduates (72%).

These insights suggest that schools aiming to engage students through social media should prioritize platforms with high daily active usage, such as TikTok, Instagram and Facebook. Additionally, understanding the differences in platform preferences between undergraduate and graduate student groups can help tailor communication strategies effectively.

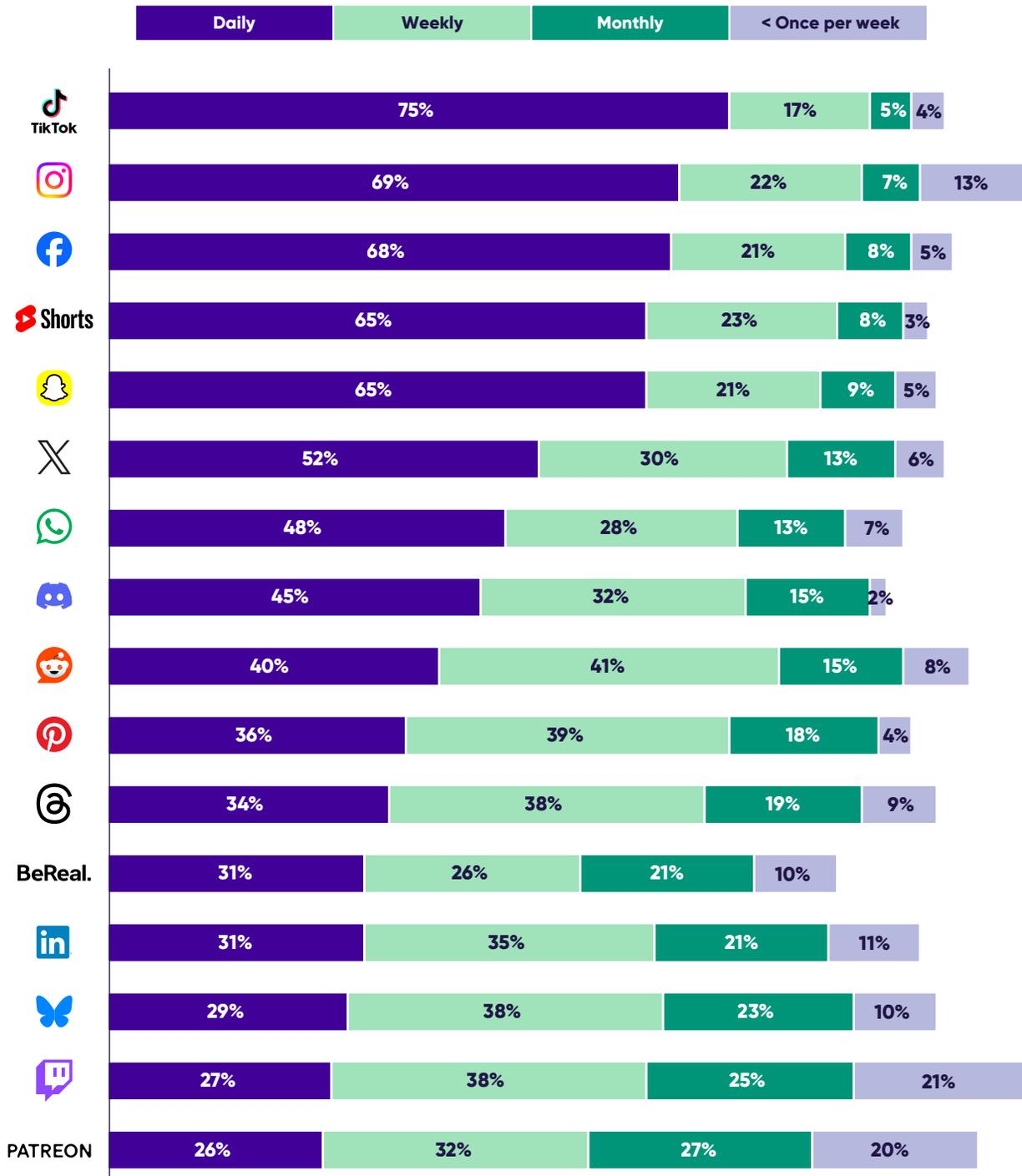
On the platforms they use, traditional undergraduate Modern Learners are more active users. On Instagram, 81% consider themselves to be daily users (compared to 64% of the total undergraduate sample). On TikTok, 75% are daily users (equaling the total undergraduate population, but with more time spent in the app). Traditional undergraduate students are more likely to follow celebrities and influencers when compared to the overall undergraduate population. In addition, undergraduate students are likely to follow schools on social media, with slightly more traditional undergraduate students reporting that they follow schools of interest on social media.





# Usage of Social Media Platforms

## Usage of Social Media Platforms for All Modern Learners





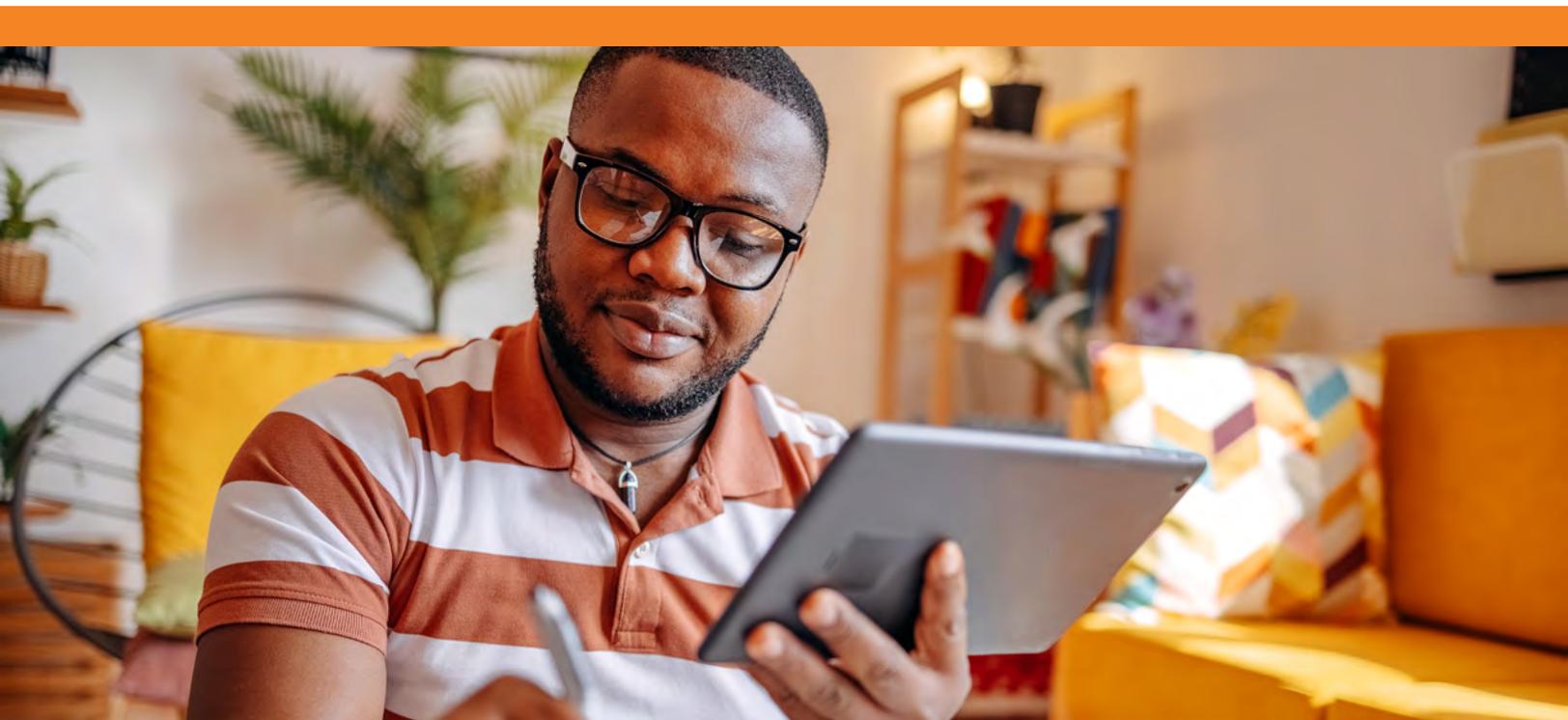
## Helpfulness of Ads in Advancing Past Consideration Set

Among those who use each social media platform, LinkedIn and Instagram ads are perceived as the most helpful in advancing past the consideration set, with 37% and 39% of users respectively finding them very helpful. Note that, nearly 70% of respondents use Instagram and 37% use LinkedIn. Facebook ads are also considered helpful, with 33% of users finding them very helpful and has a high daily usage rate of 68%.

Graduate students find LinkedIn ads particularly helpful, with 39% rating them very helpful compared to 34% of undergraduates. Similarly, TikTok ads are more effective among graduates, with 43% finding them very helpful compared to 36% of undergraduates.

While users reported finding ads less useful on some platforms, it is important to note that at least one quarter of users found ads very helpful on all but one platform, and over half of platforms users reported ads being at least somewhat helpful on all platforms.

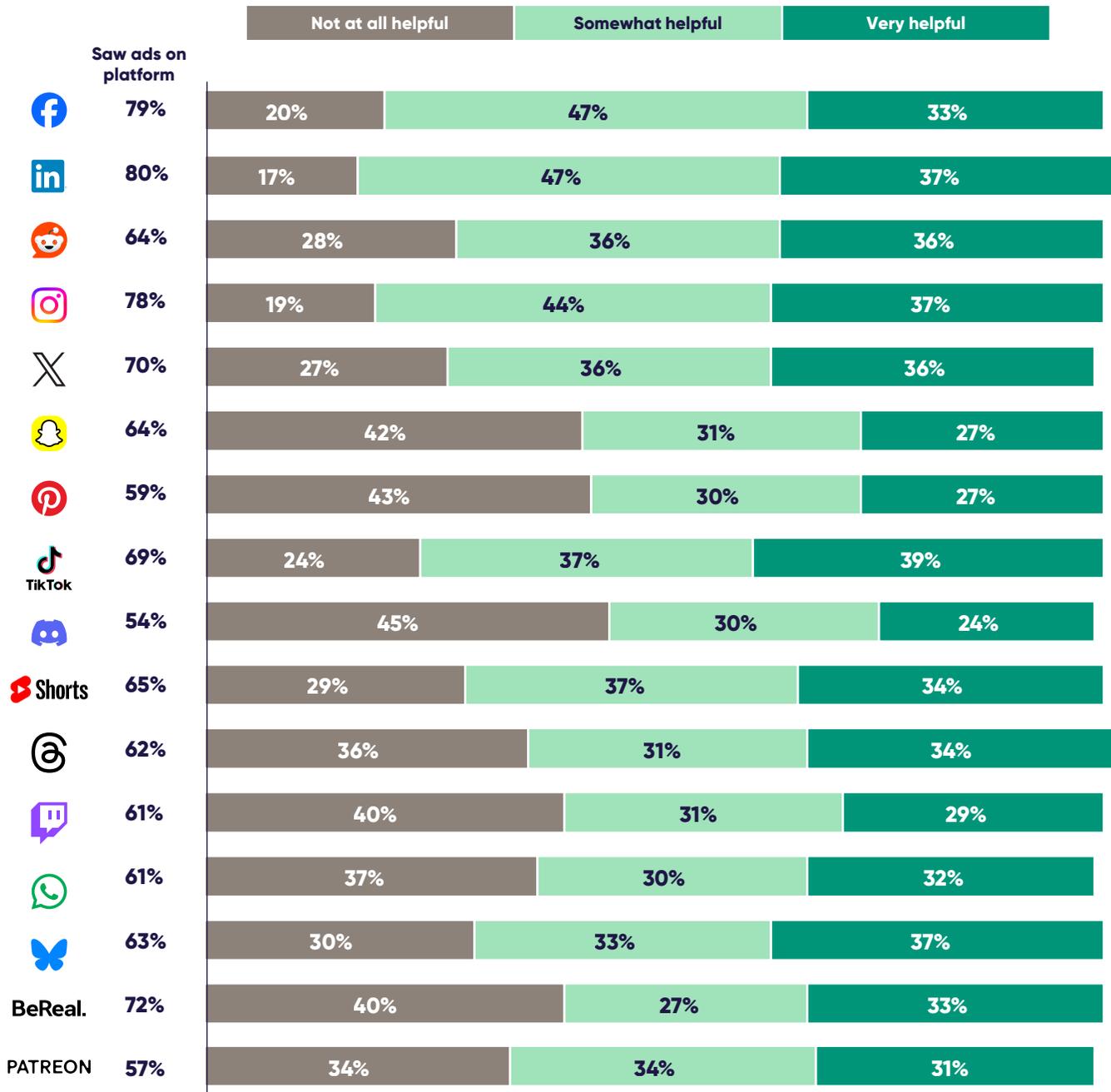
These data points highlight that social media is a vital tool for reaching students and should be leveraged to engage them and keep schools top of mind as they enter consideration sets. Much more than just a source of entertainment, social media is an effective channel for full-funnel marketing activities when strategically integrated with awareness, engagement and conversion efforts.





# Helpfulness of Ads in Advancing Past Consideration Set

## Helpfulness of Ads in Advancing Past Consideration Set (Total)

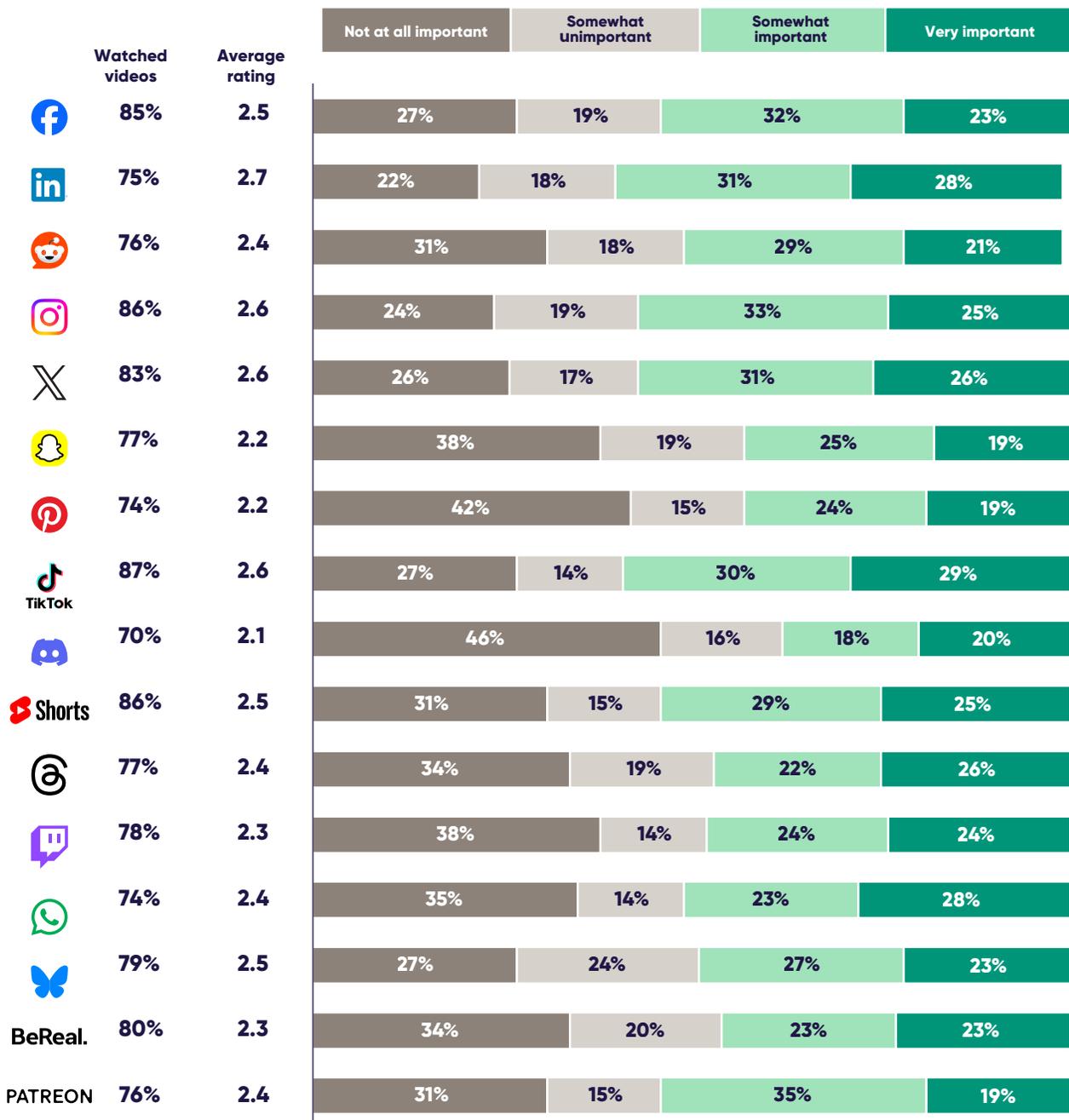




# Importance of Social Media Videos in School Selection Decision-Making

Among social media users of each platform who viewed ads on the platforms they use, LinkedIn and TikTok videos are considered the most important in the school selection decision-making process, with average ratings of 2.7 and 2.6 respectively.

## Importance of Social Media Videos in School Selection Decision-Making (Total)





# Importance of Online Reviews for School Selection

Online reviews are highly important, with 48% of respondents rating them as very important and an average rating of 3.3. This indicates that prospective students heavily rely on online reviews when considering schools. Social media reviews are also significant, with 31% of respondents finding them very important and an average rating of 2.9.

## Helpfulness of Ads in Advancing Past Consideration Set (Total)



# Visiting School Websites for Information

Overall, 82% of respondents visited school websites to gather more information about the school or programs, indicating a high reliance on official school websites during the research process. This trend is consistent across both undergraduate and graduate students as well as the subsets within undergraduate populations.

## Visiting School Websites for Information

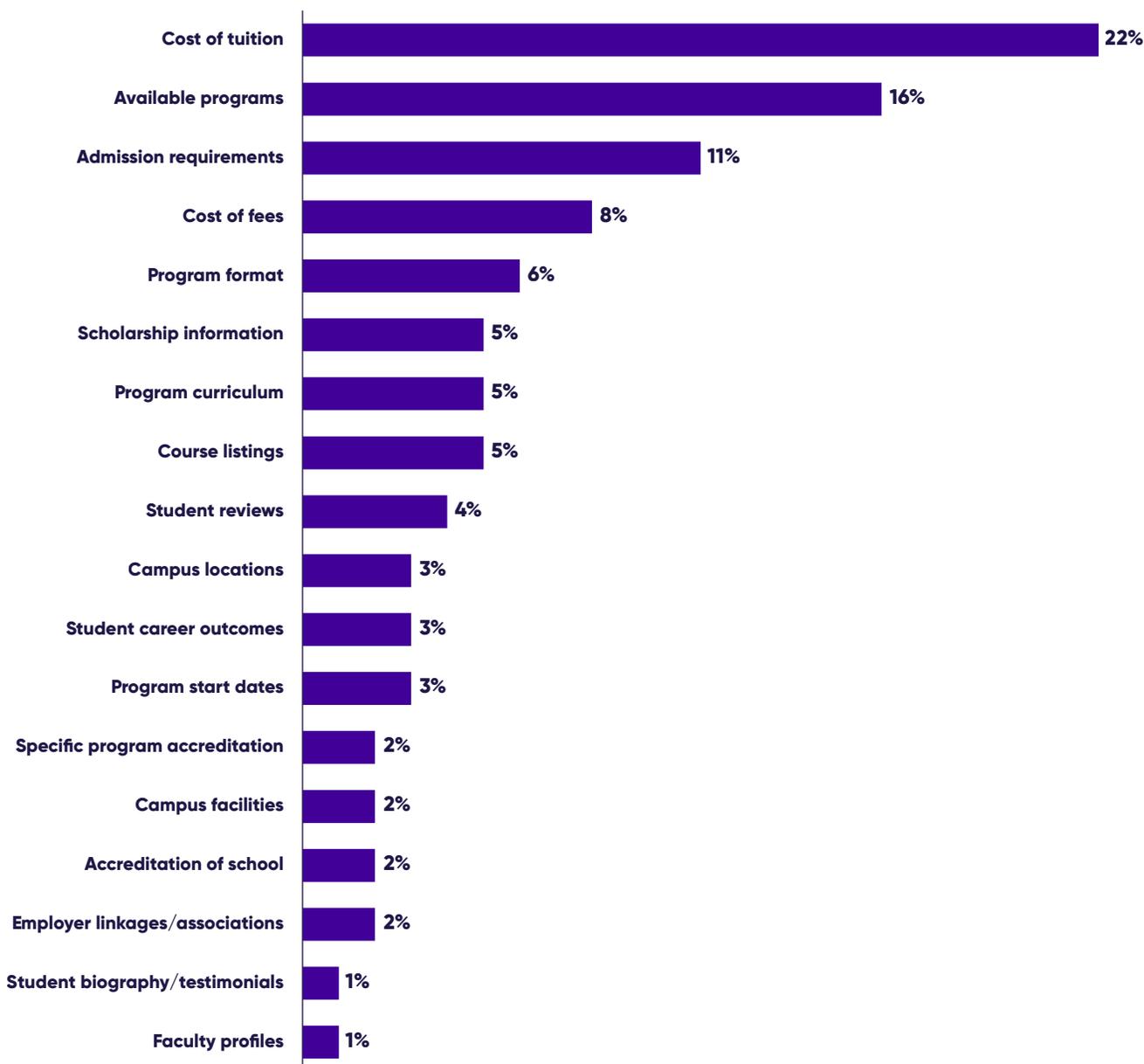




# Most Important Information Sought on School Websites

Cost of tuition is the most important information for 22% of respondents when searching school websites.

**Most Important Information Sought on School Websites**





## Ease of Finding Information on School Websites

Of those who sought specific types of information on school websites, respondents found it relatively easy to locate some information they seek, with the highest average ratings for available programs (4.3) and campus locations (4.2). The format of programs (on-campus, online, hybrid, etc.) also received a high average rating of 4.2, suggesting that schools effectively communicate the various formats available to students. This indicates that schools are generally providing clear information on these most basic topics of interest.

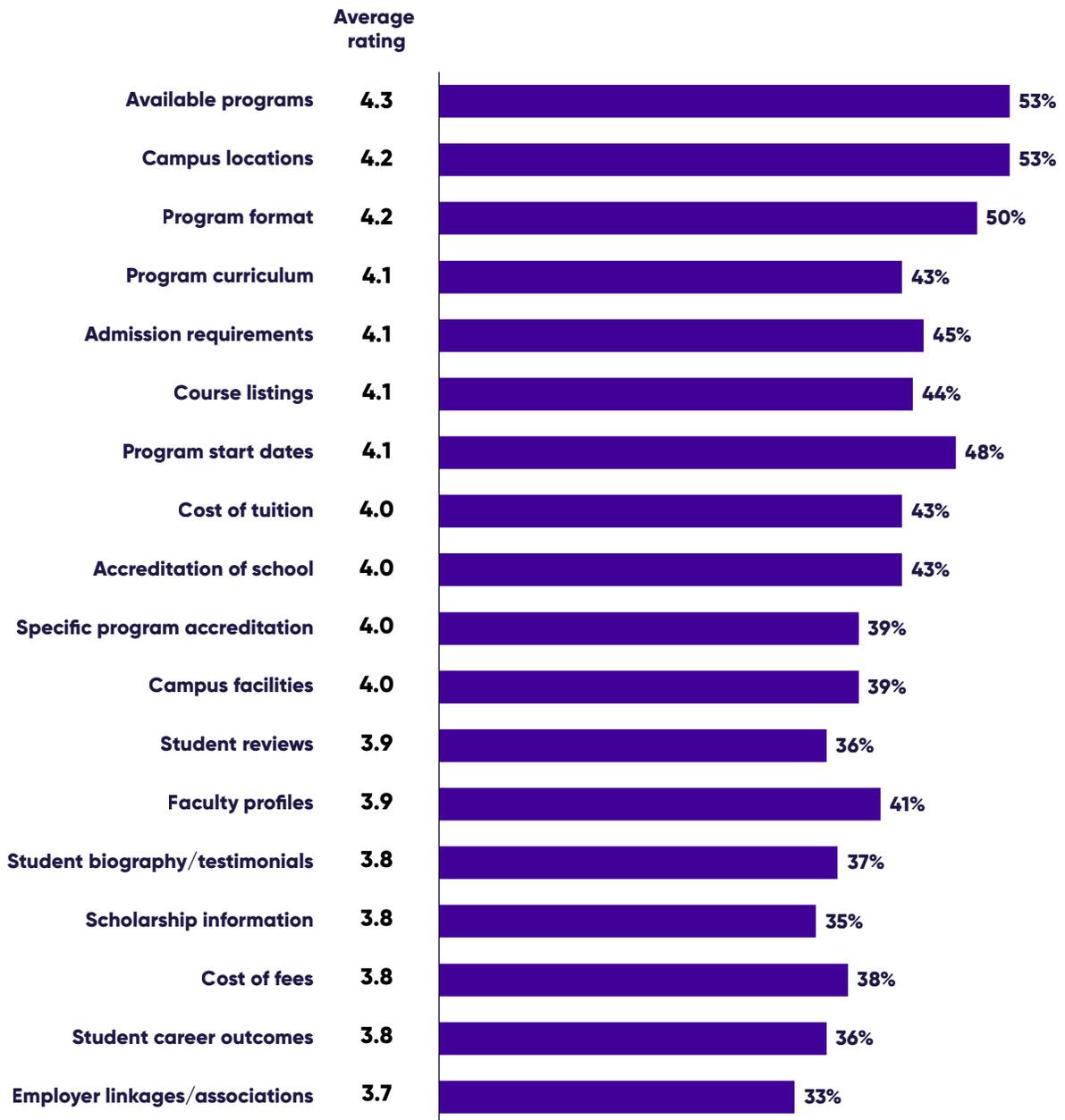
Schools are not adequately providing information on the topics of greatest interest to prospective students. Only 43% of respondents reported it was easy to find information on the cost of tuition on school websites. Career outcomes information and details about employer associations were the least likely to be found on school websites.





# Ease of Finding Information on School Websites

## Ease of Finding Information on School Websites



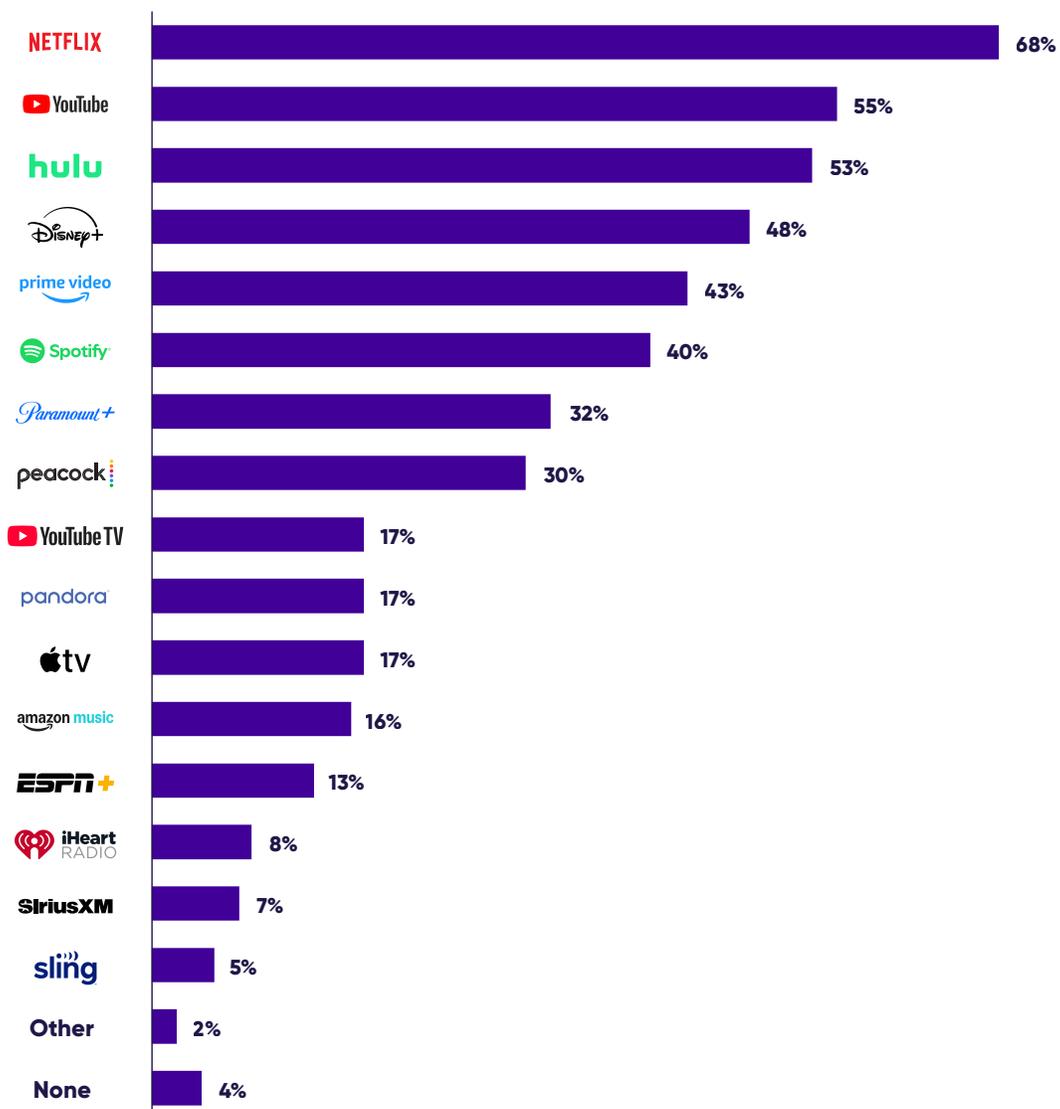


# Streaming Media

## Streaming Media Usage

Overall, Netflix is the most popular streaming service, used by 68% of respondents and near equal proportions across subgroups. YouTube and Hulu are also widely used, followed closely by Disney+.

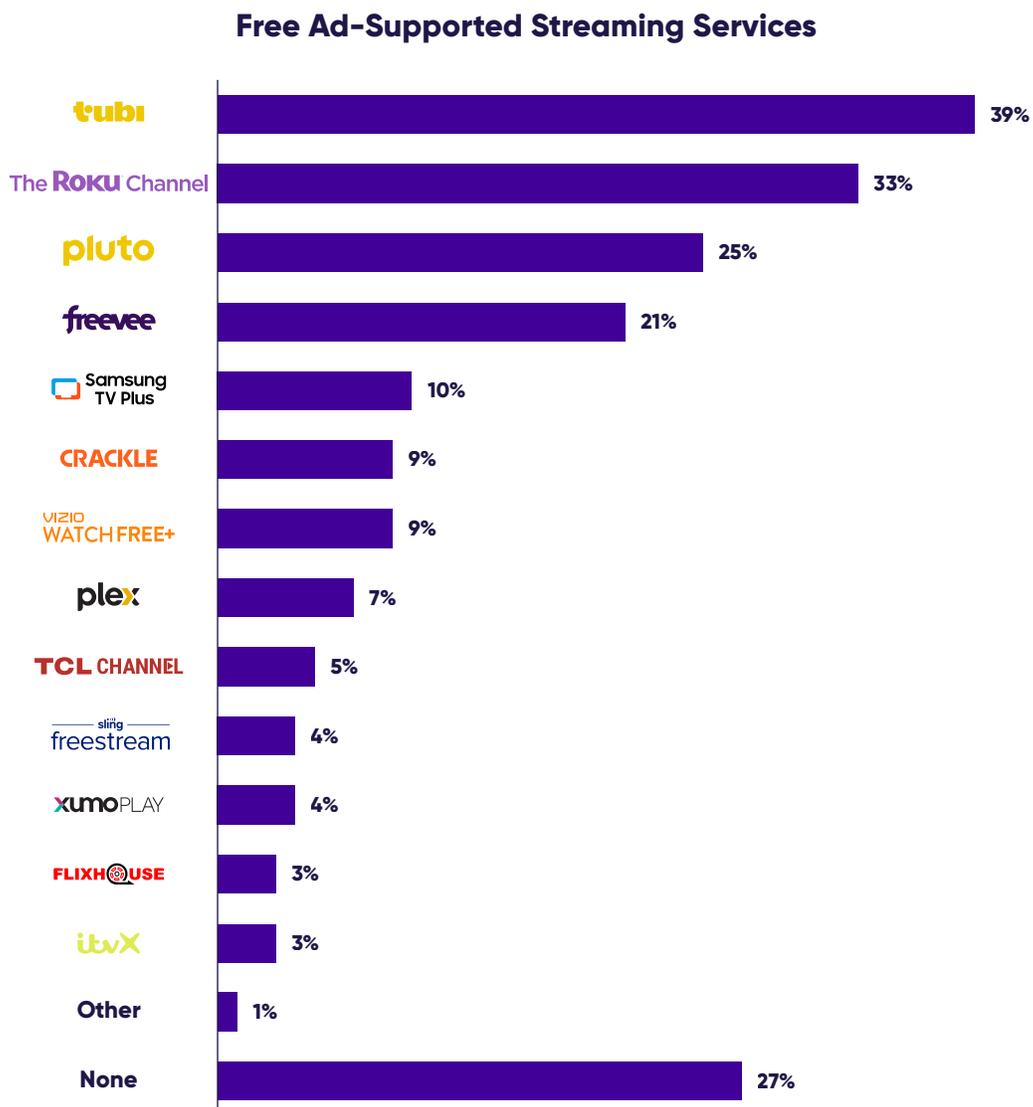
Streaming Media Usage





# Free Ad-Supported Streaming Services

Among the nearly 70% of respondents who use Free Ad-Supported Streaming (FAST) Services, Tubi is the most popular, used by 39% of respondents. Overall, more than 70% of Modern Learners rely on FAST for entertainment and information. While a majority of traditional undergraduate students reported using FAST services, it is interesting to note that the 55% of traditional undergraduate respondents was lower than the entire population.



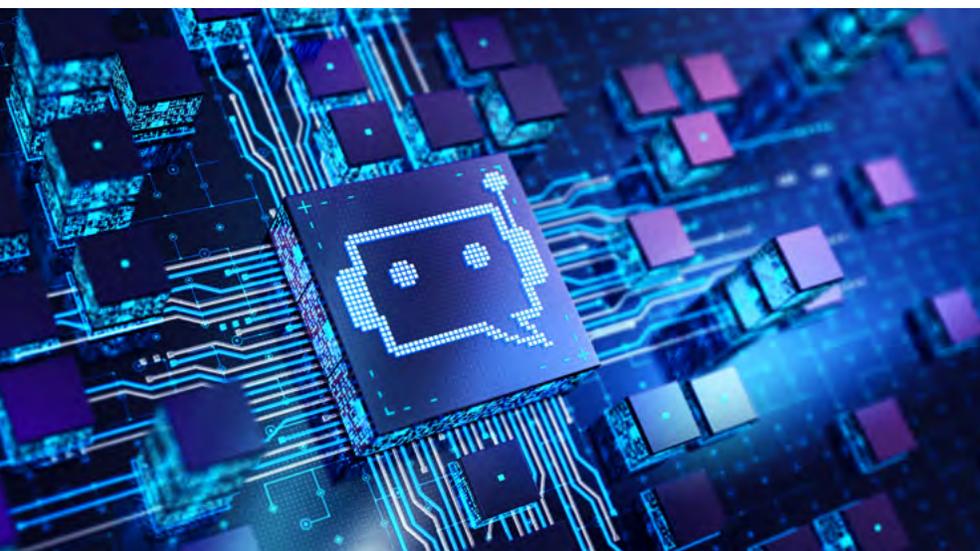
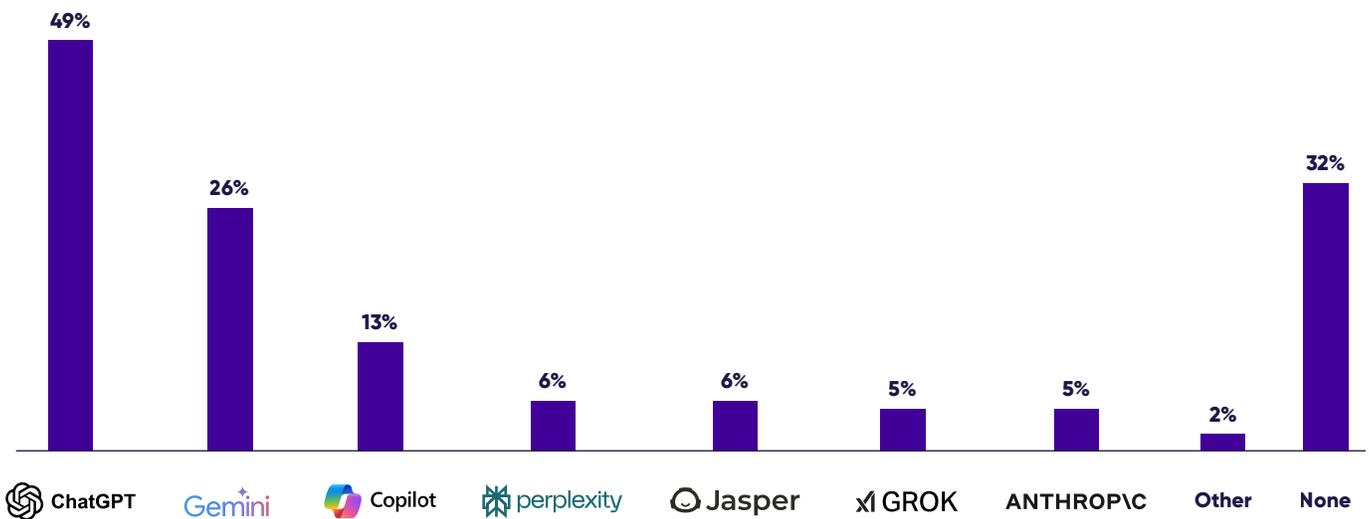


# AI Usage

## Adoption of AI Chatbots and Platforms

Nearly 70% of respondents and near equal numbers of undergraduate and graduate Modern Learners have utilized AI chatbots. ChatGPT is the most widely used AI chatbot platform, with 49% of respondents having used it. Traditional undergraduate students are more likely to have used AI chatbots than their non-traditional and graduate counterparts.

Adoption of AI Chatbots and Platforms





# Use of AI Tools for School Information Gathering

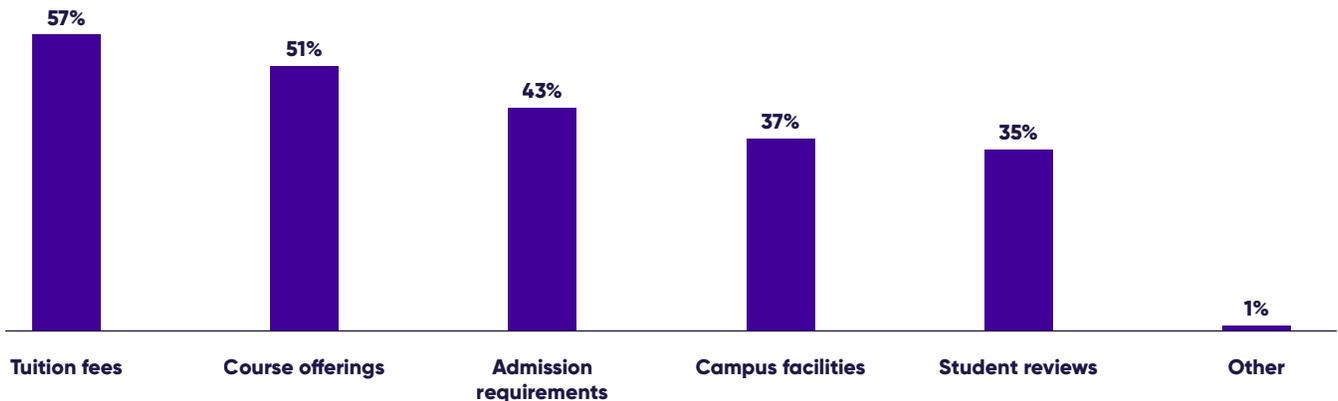
Thirty-seven percent of Modern Learners have used AI tools like AI chatbots to gather information about schools, indicating another opportunity to provide comprehensive and accessible information and support prospective students in their decision-making process. The most sought-after information by AI users who sought school information from AI tools includes tuition fees (57%), course offerings (51%) and admission requirements (43%).

Note that despite using AI tools more frequently, traditional undergraduate students were only slightly more likely to utilize these services for school research.

## Used AI For School Information Gathering



## Information Sought Using AI



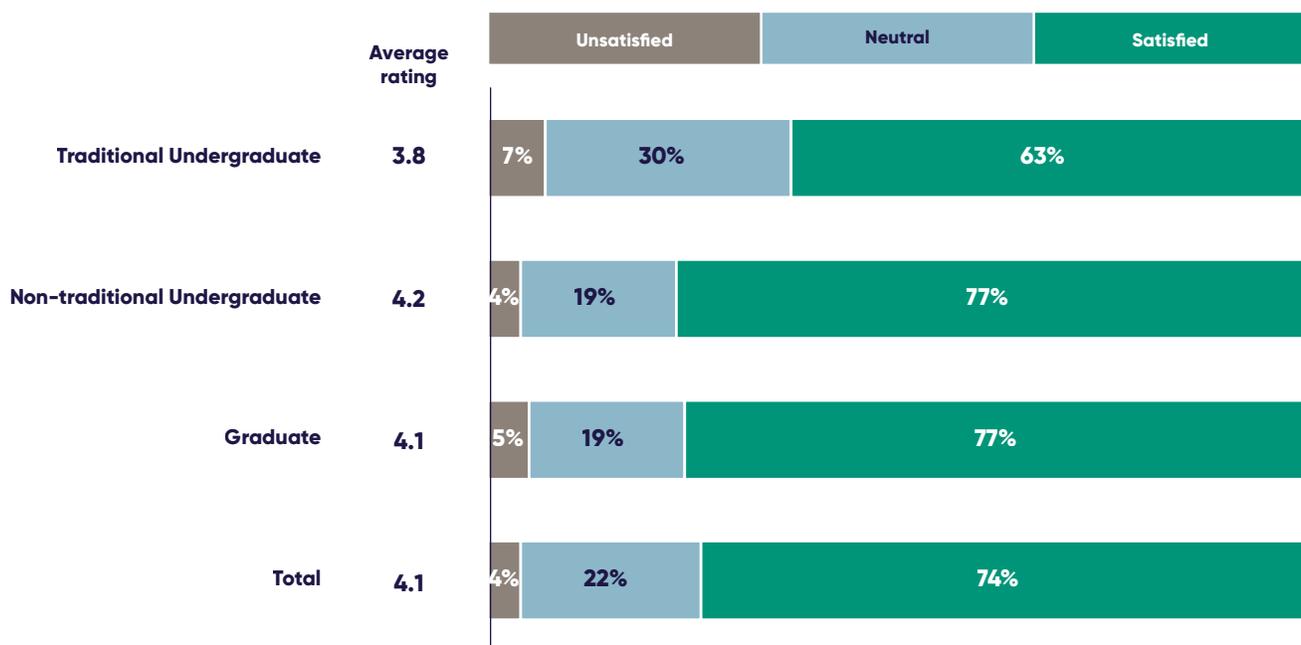


## Satisfaction with AI Tools

Nearly 75% of respondents who used AI tools to seek information about schools are at least fairly satisfied with the information provided, with 35% being satisfied. Graduate students show slightly higher satisfaction (41% very satisfied) compared to undergraduates, overall (37%).

However, undergraduate traditional students are less likely to find total satisfaction with AI tools and rated them lower overall.

Satisfaction with AI Tools

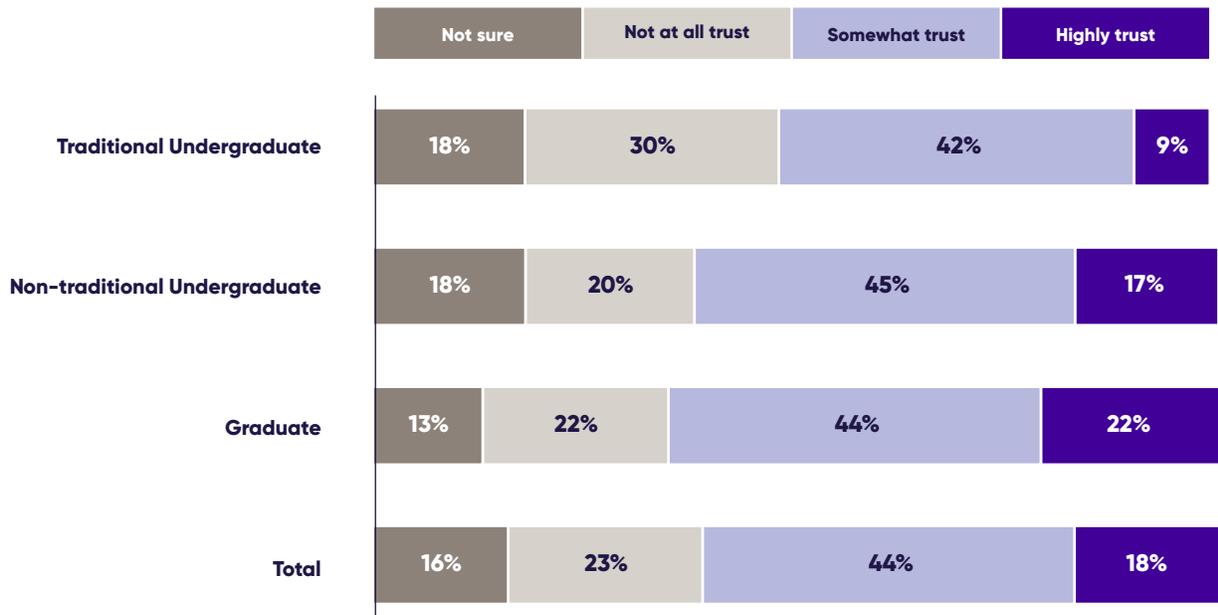




# Trustworthiness of AI in Consideration of Schools

About two-thirds of Modern Learners who utilized AI tools find them to be at least somewhat trustworthy. However, less than 20% of respondents who utilized AI tools to find information about schools highly trust these tools to help them make decisions about which schools to consider or enroll in.

**Trustworthiness of AI in Consideration of Schools**





# Search Generative Experience Responses Impacted Consideration Set

The data shows that 49% of respondents have had their school consideration set impacted by Search Generative Experience responses, with a higher impact among graduate students (55%) compared to undergraduates in total. This indicates that AI-generated search results can significantly influence students' decisions of which schools to consider. Schools should focus on maintaining a strong online presence and leverage modern website marketing techniques to increase the likelihood of positively influencing SGE results.

## Search Generative Experience Responses Impacted Consideration Set





## Utilized Website Chatbot

Overall, 26% of respondents have utilized school website chatbots, with a higher usage among graduate students (30%) compared to undergraduates. This suggests that chatbots are a valuable tool for providing immediate information and support to prospective students.

The most sought-after information includes cost of fees (37%), available programs (37%) and cost of tuition (35%). Schools must ensure that they offer well-functioning chatbots that can provide accurate and timely information to support students in their research.

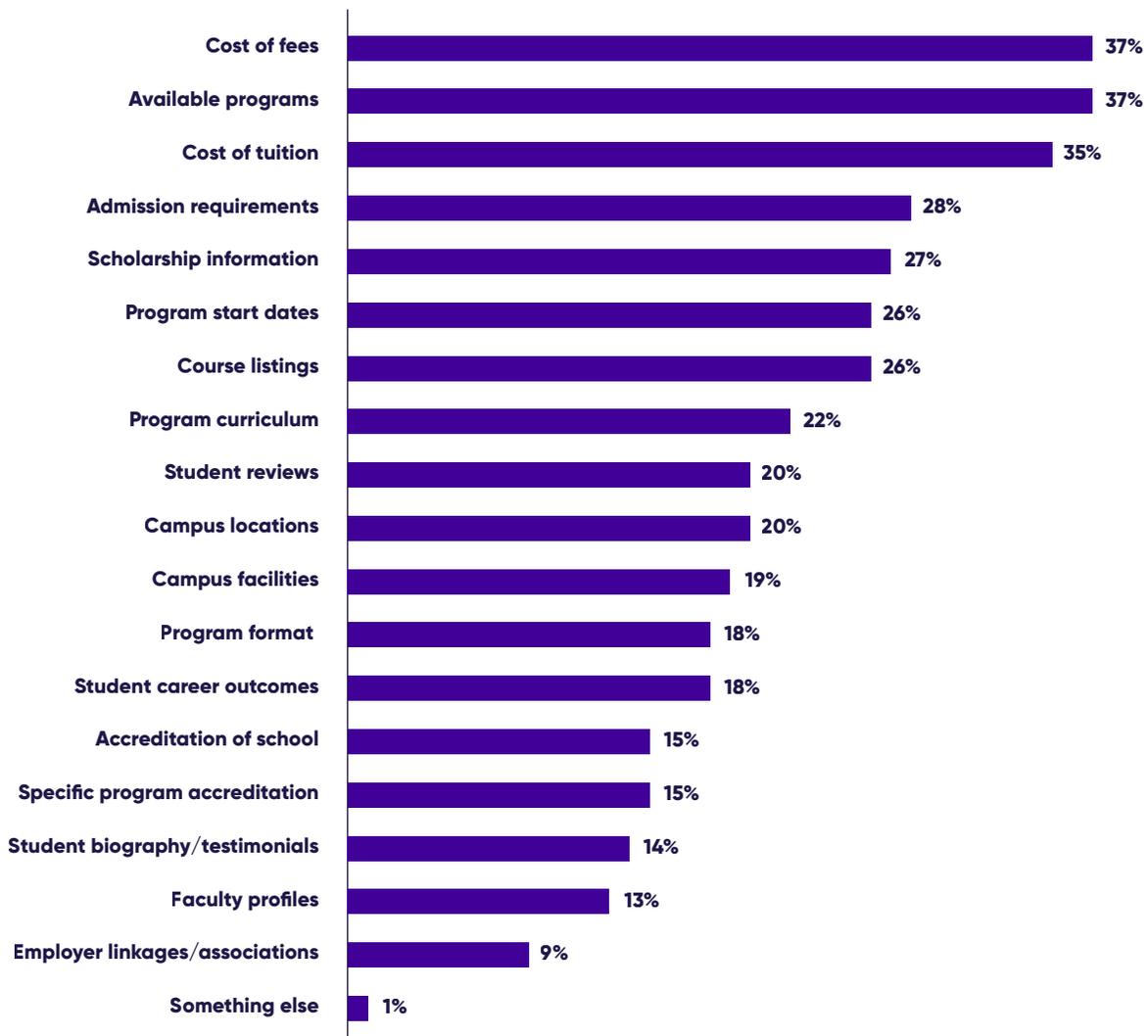
Traditional undergraduate students were far less likely to utilize website chatbots during their search.

### Utilized Website Chat





## Information Sought Using Website Chatbot



## Helpfulness of Website Chat

Among Modern Learners who used Chatbots, 93% found the website chat helpful in providing the information they needed, across all populations. This high level of satisfaction suggests that Chatbots are an effective tool for supporting prospective students. Schools should continue to invest in and improve their Chatbot technology to maintain this high level of user satisfaction.

### Helpfulness of Website Chat

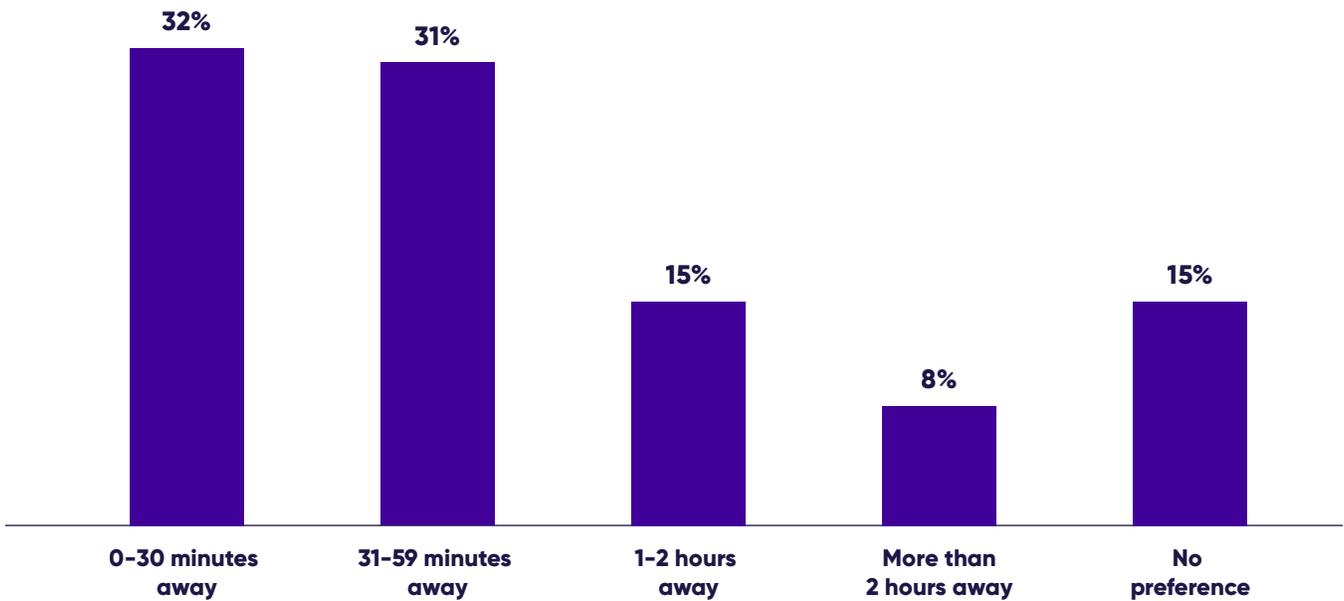




# Location-based Consideration

## Distance Preference

Overall, 32% of respondents prefer a school that is 0-30 minutes away from their home or place of work. Additionally, 31% of respondents are willing to consider schools that are 31-59 minutes away. These insights suggest that proximity is an important factor for many students when choosing a school.

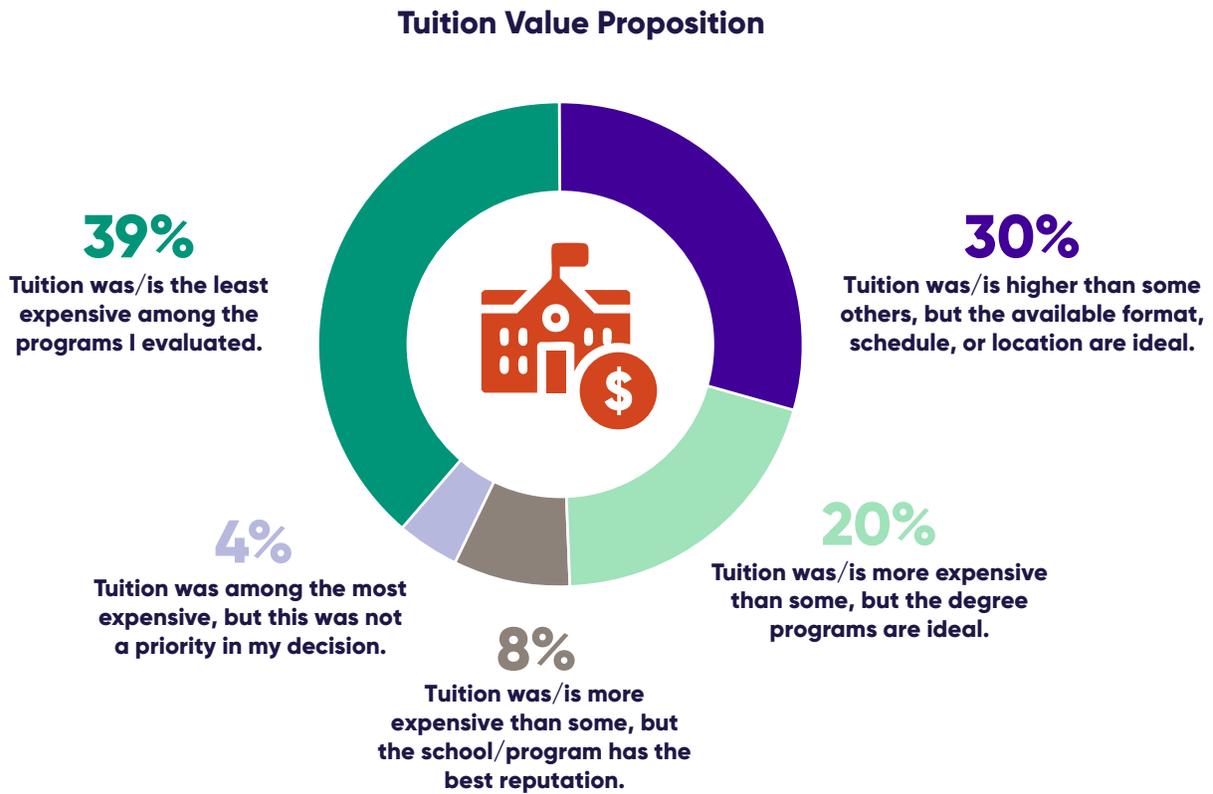




# Tuition Considerations

## Tuition Value Proposition

Across the Modern Learner population, 39% chose their program based on it being the least expensive among the options they evaluated. Note that while 40%, in total, indicated that cost was the leading factor, 60% of respondents still had factors resonate other than cost.

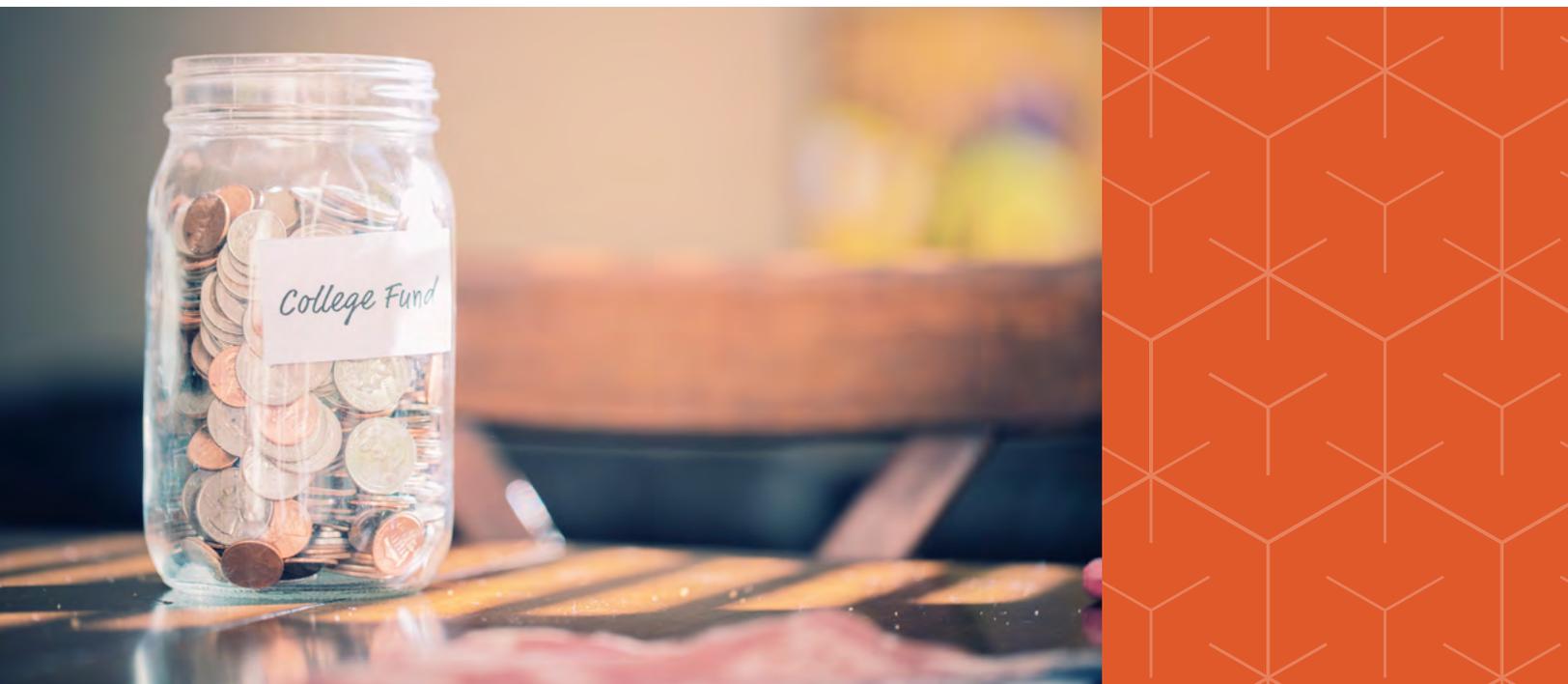
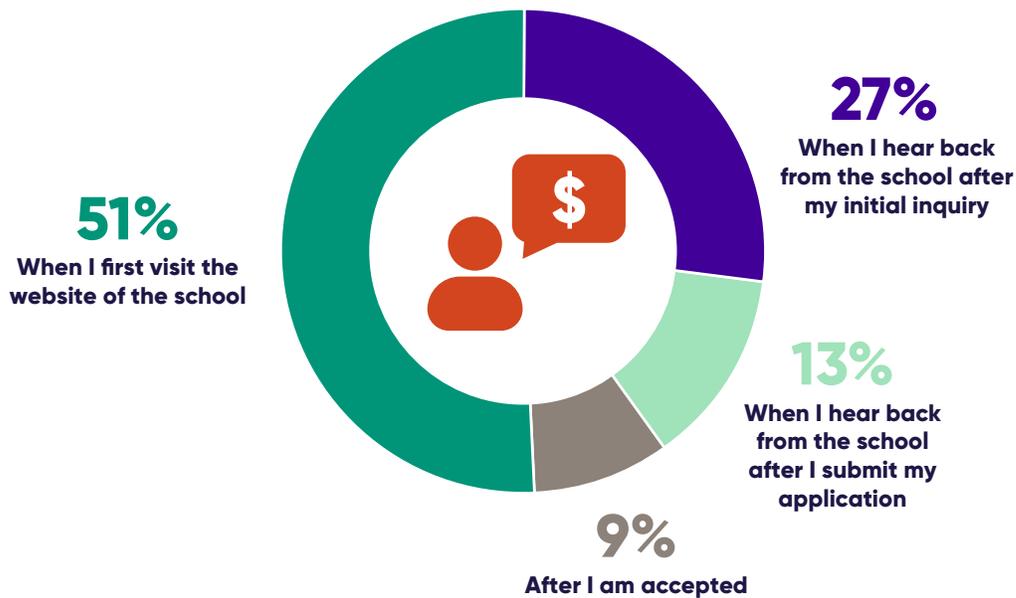




## Preferred Timing to Learn Costs

As described earlier, costs are the most important information sought on school websites, although less than half of Modern Learners can find cost information easily. All student groups preferred to see costs when initially visiting the school website.

Preferred Timing to Learn Costs



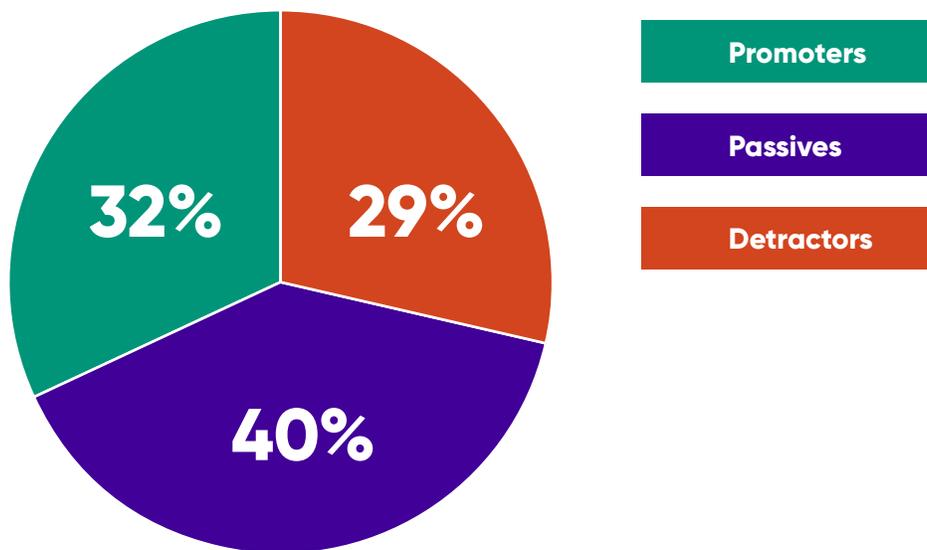


# Higher Education Experience

## Rating of Educational Experience

Overall, one-third of respondents are promoters of their educational experience, rating it highly, with a slightly higher percentage among graduates (34%) compared to undergraduates (31%). However, this varies among specific subsets of the undergraduate population. For example, 41% of those who studied fully online would be considered promoters, while only 24% of traditional undergraduate students would be considered promoters.

Rating of Educational Experience

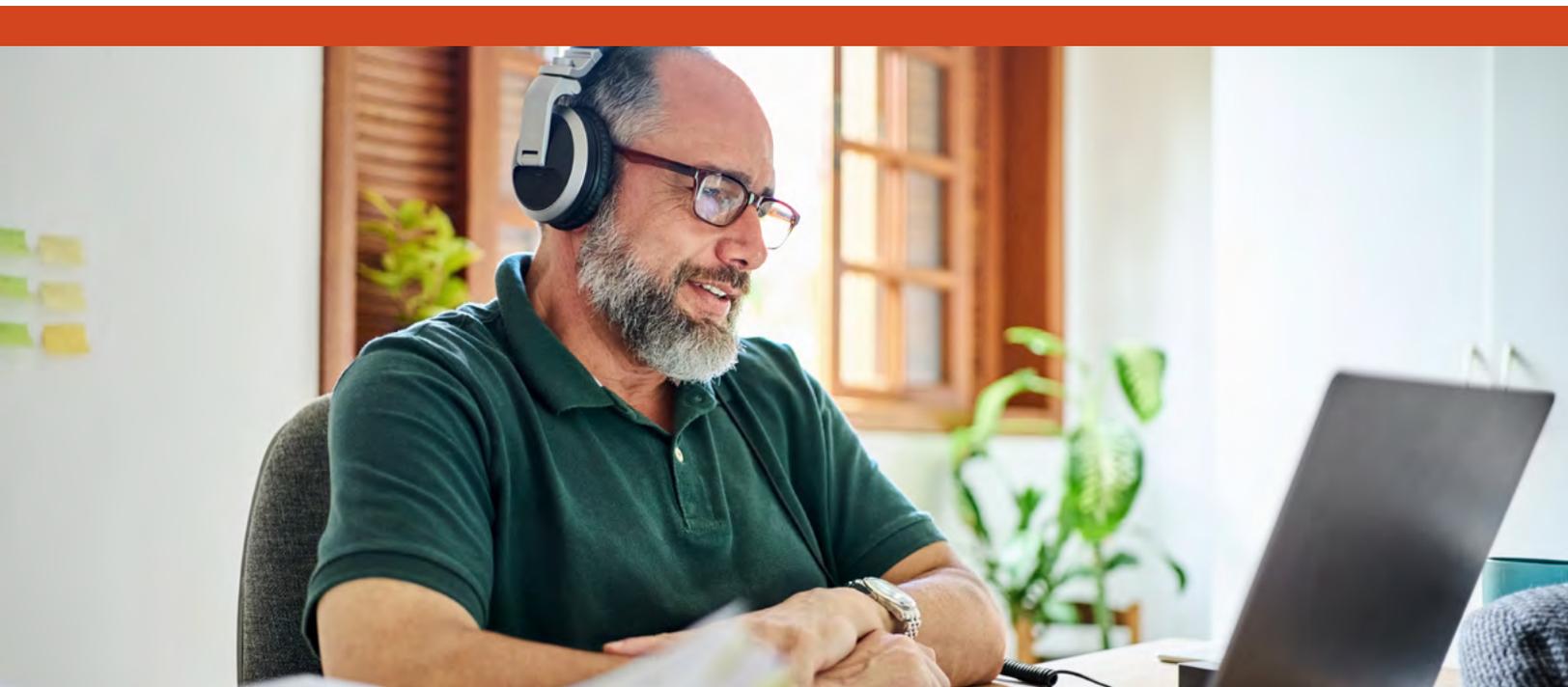
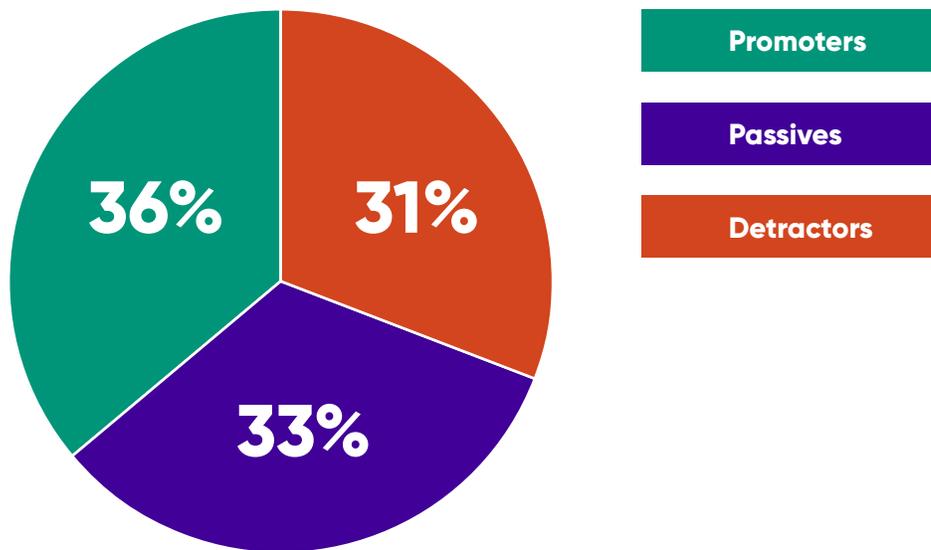




## Likelihood to Recommend Program Format

Just slightly more than one-third of respondents are promoters, likely to recommend their program format to others. Traditional undergraduate students are less likely to be promoters than other subsets of the undergraduate population. Among graduate students, non-degree students are less likely to be promoters than graduate students overall.

Likelihood to Recommend Program Format



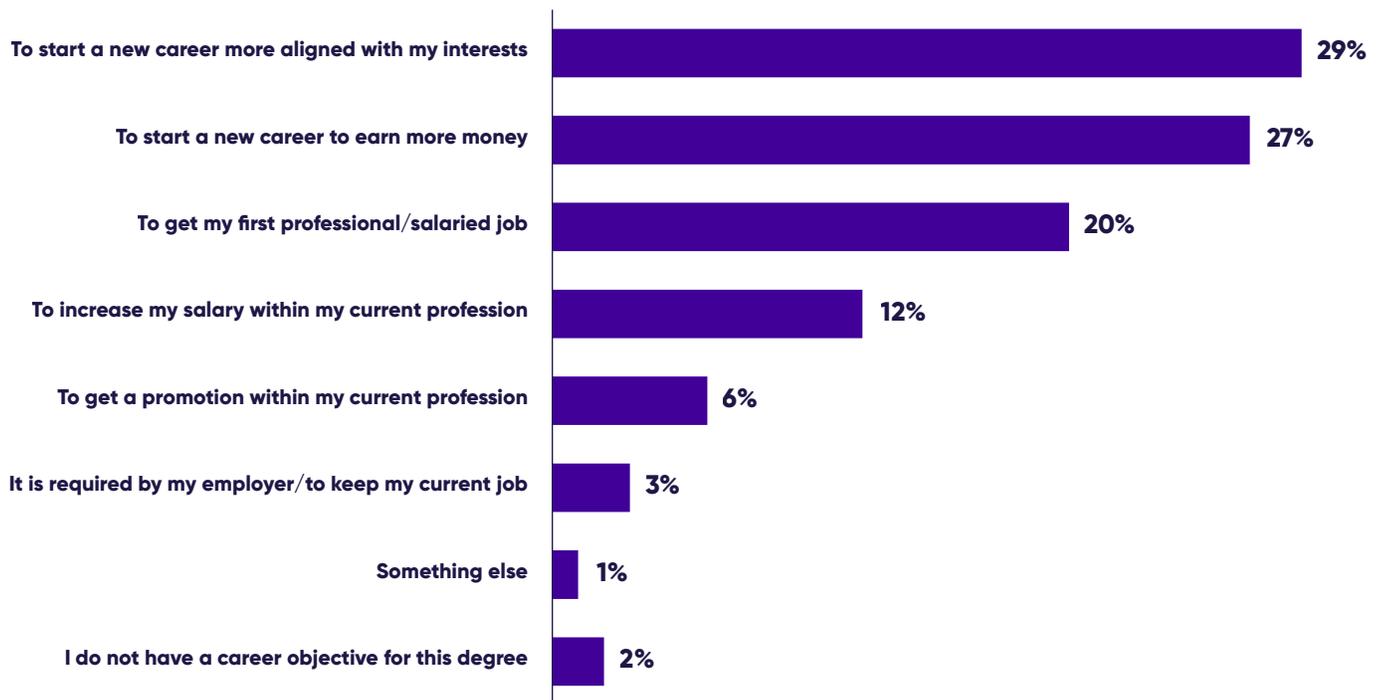


# Aligning Education and Careers

## Career Related Motivation for Enrolling

The main driving motivations for enrollment are career focused. The primary career objective for earning a degree, certificate or license is to start a new career more aligned with personal interests, with 29% of respondents selecting this option. This motivation is consistent across both undergraduate and graduate students. However, traditional-focused Modern Learners are enrolling to get their first job.

**Career Related Motivation for Enrolling**





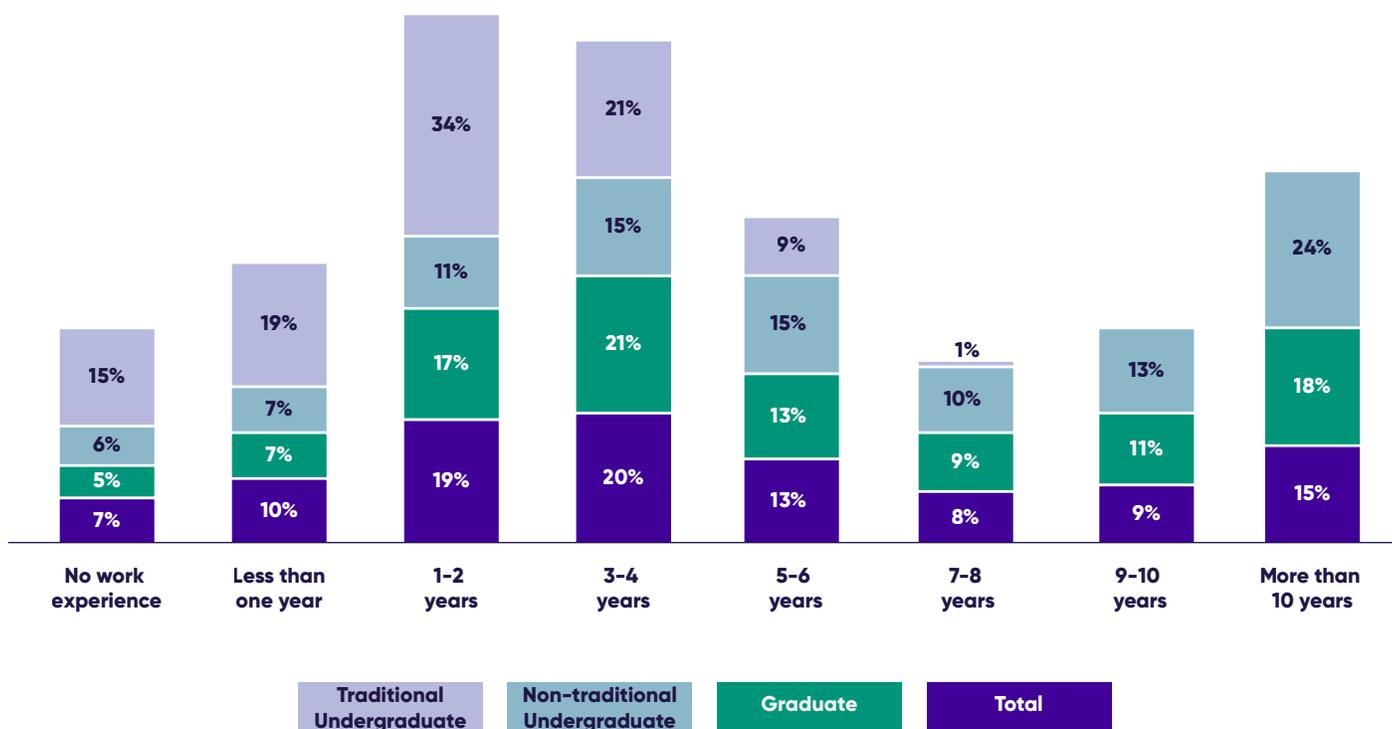
# Work Experience

Work experience varies greatly across student populations. However, a majority of all students reported having at least some work experience.

Non-traditional undergraduate and graduate students report significant work experience. Forty-seven percent of non-traditional undergraduate students and 38% of graduate students reported seven or more years work experience.

While traditional students reported far less work experience, only 15% reported having no work experience and over 30% reported having three or more years work experience.

### Work Experience



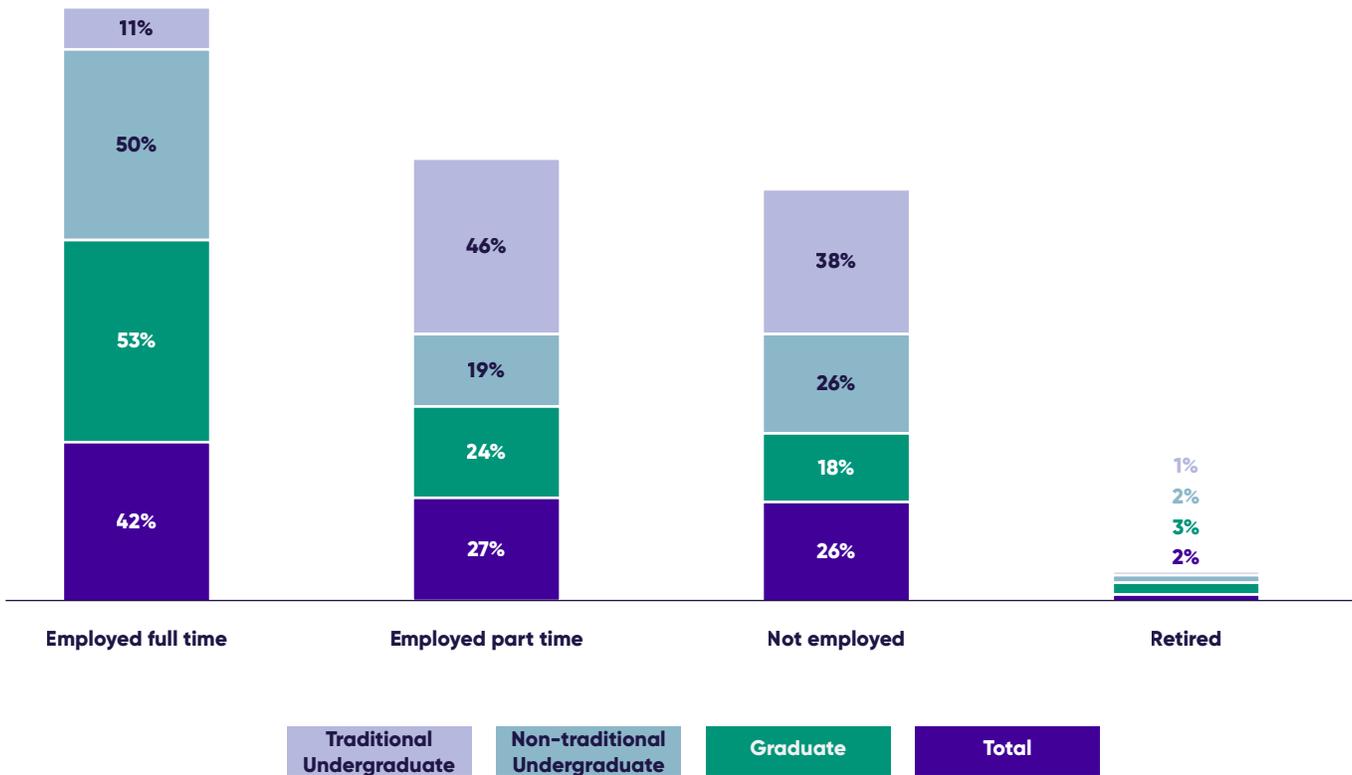


# Employment Status

A majority of graduate (50%) and non-traditional undergraduate (53%) students are employed full time. Graduate students were the most likely to be employed, with 88% employed either part time or full time.

A majority of traditional students (56%) are also employed, including 11% working full time.

Employment Status



Note: Approximately three percent of respondents did not disclose employment status.

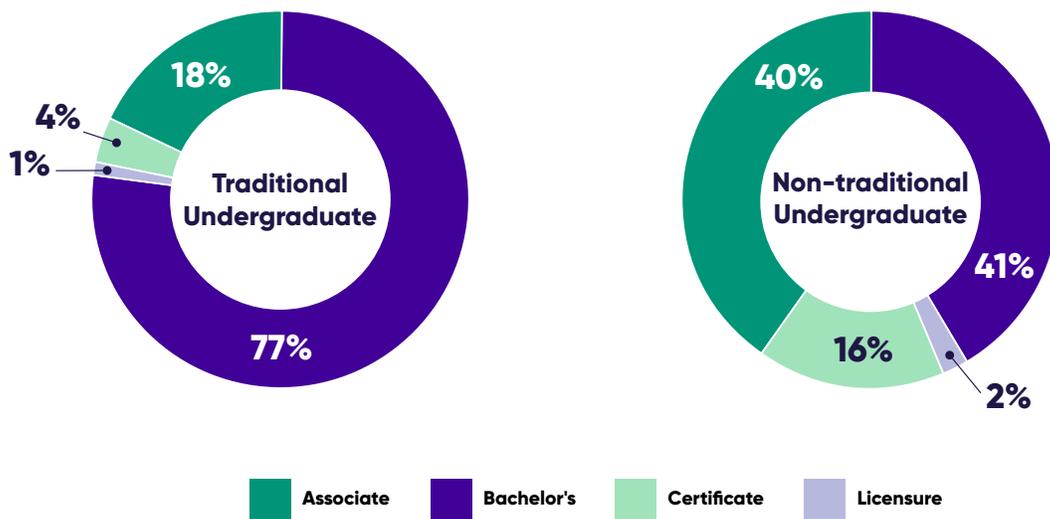


# Student Enrollment Data

## Level of Study

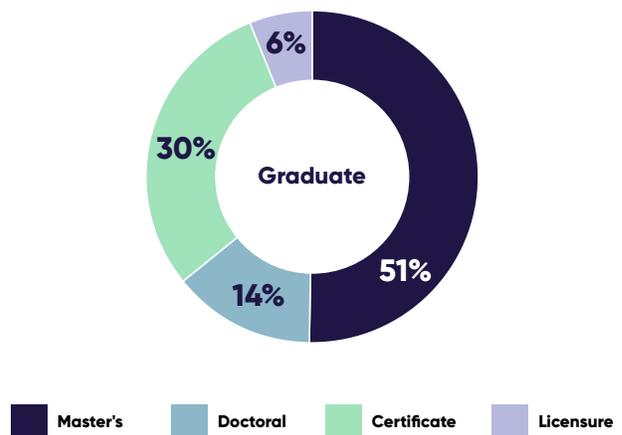
The survey sample included undergraduates pursuing bachelor and associate degrees as well as non-degree granting programs. Those sampled reported a significant difference between their desired level of study. Respondents on a traditional study track were far more likely to pursue a bachelor’s degree, while non-traditional students were split more evenly between associate degrees and bachelor’s degree programs. Non-traditional respondents were also far more likely to pursue certificate and licensure programs.

### Undergraduate Level of Study



### Graduate Level of Study

While over half of graduate level respondents were pursuing master’s degrees, a significant number (30%) were pursuing a certificate program and six percent were pursuing a licensure program.



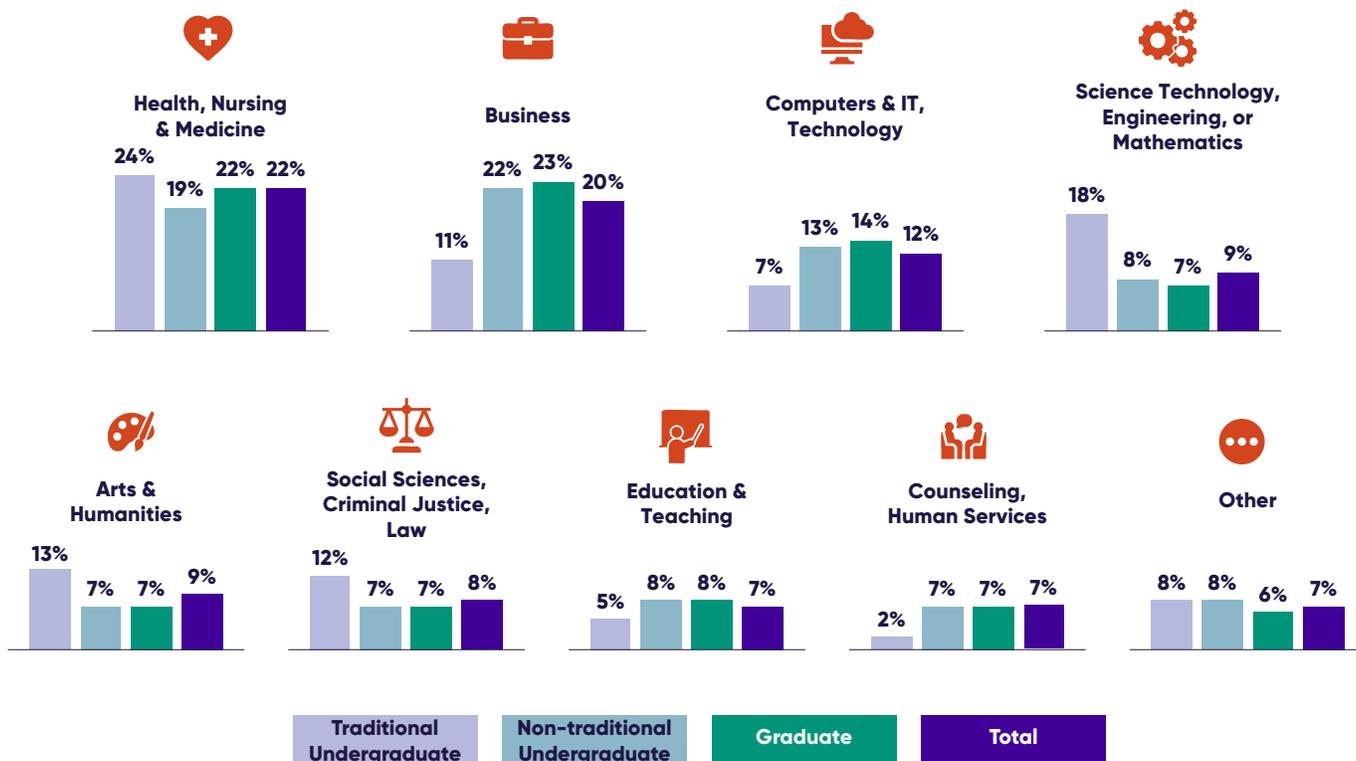


# Program of Study

Health, Nursing & Medicine was the market leader in program of study for the first time in the history of this research among undergraduate students. Among graduate students, Business remains the most popular study focus.

Traditional undergraduate students (18-22, studying on campus), held 24% of the Health, Nursing & Medicine market share. However, among non-traditional undergraduate Modern Learners, business still leads in market share. While graduate study remains with Business as the leading topic of study, 27% of the large graduate non-degree market is held by Health, Nursing & Medicine study.

## Program of Study - Subject Field





# Demographics

## Demographic Profile of Total Modern Learner Population

**Gender Identity:** The majority of respondents identify as female (66%), with a higher percentage among undergraduates (68%) compared to graduates (63%). Males make up 28% of the total, with a slightly higher representation among graduates (31%) compared to undergraduates (26%). Non-binary/non-conforming individuals constitute 5% of both undergraduate and graduate respondents.

**Marital Status:** Most respondents are single (73%), with a higher percentage among undergraduates (77%) compared to graduates (68%). Married or partnered individuals make up 27% of the total, with a higher percentage among graduates (32%) compared to undergraduates (23%).

**Children Under 18 in Household:** Over half of the respondents (53%) do not have children under 18 at home, with a higher percentage among undergraduates (58%) compared to graduates (47%). Among those with children, 17% have one child, 17% have two children and 12% have three or more children, with graduates more likely to have children than undergraduates. Note that while 44% of fully online students in the 2025 survey indicated they did not have children present in their household, this represents a 15 increase of those fully online students who did have children present. This indicates the need for more flexible programming as more and more students have to manage family responsibility as they study.

**Total Household Income:** The largest income group is under \$25,000, comprising 23% of respondents, with a higher percentage among undergraduates (26%) compared to graduates (20%). Other significant income brackets include \$25,000-\$39,999 (21%) and \$40,000-\$54,999 (17%), with similar distributions across both undergraduate and graduate students. Note that when comparing the fully online sample from 2025 to 2015 data, the total household income remains essentially unchanged.

**Number in Household Enrolled:** Most respondents (65%) have one person in their household currently enrolled or planning to enroll in college-level study, with similar percentages for undergraduates (66%) and graduates (64%). Households with two enrolled individuals make up 19% of the total.



**Racial Identity:** The majority of respondents identify as White (64%), followed by Black or African American (29%) and Asian (7%). The distribution is consistent across both undergraduate and graduate students.

**Hispanic, Latino or Spanish Origin:** The majority of respondents (75%) are not of Hispanic, Latino or Spanish origin. Among those who are, 13% identify as Mexican, Mexican American or Chicano, with similar percentages across both undergraduate and graduate students.

**First in Family to Attend College:** A significant portion of respondents (34%) are the first in their family to attend college, with similar percentages for undergraduates (34%) and graduates (35%).

**Military Affiliation:** Most respondents (83%) have no military affiliation. Among those who do, 6% are veterans, with a slightly higher percentage among graduates (7%) compared to undergraduates (5%). Note that the percentage of fully online respondents with military affiliation has grown by five percent over the past 10 years.

**Residence Location Type:** The largest group of respondents live in suburban areas (44%), followed by rural areas (30%) and urban areas (26%). Undergraduates are more likely to live in suburban areas (46%) compared to graduates (41%).

**State of Residence:** The most common states of residence are California (10%), Texas (9%) and Florida (7%). The distribution is similar across both undergraduate and graduate students.

**Enrolled in State:** The majority of respondents (81%) enrolled in a school within their state of residence, with similar percentages for undergraduates (81%) and graduates (80%).

**Out of State Enrolled:** Among those who enrolled out of state, the most common states are Arizona (11%), Florida (8%) and California (7%). Graduates are more likely to enroll in California (9%) compared to undergraduates (6%).

**Age:** The age distribution shows that the majority of respondents are between 18 and 24 years old, with undergraduates more likely to be younger (18-21 years old) compared to graduates. The age group 40 and older constitutes 4% of the total, with a higher percentage among graduates (5%) compared to undergraduates (3%).

# Grow Your Enrollments in 2025

EducationDynamics is transforming higher education by driving outcomes that matter and helping schools understand and serve all Modern Learners. We are passionate about helping schools break from the status quo by better understanding the Modern Learner. Our unified brand and enrollment growth strategy helps schools optimize human potential and enables the transformation of individuals, teams and organizations in higher education.

**Ready to transform your institution? Speak to the experts that empower growth and strengthen institutional brand reputations through bold innovation and strategic expertise.**

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