



Modern Learner 2.0

The New Enrollment Model



Foreword

Over the past several years, there has been a realization that enrollment results are less stable and less responsive to optimization efforts. Predictability has fallen even as targeting has become more refined. Yield fluctuates without clear cause. Melt persists regardless of outreach campaign strategy. Attrition rises as more students opt out prior to completion.

The conclusion is clear: legacy enrollment frameworks no longer match the reality of a reshaped landscape.

Learners now decide in a different environment—one shaped by abundant information, artificial intelligence, rising economic risk and continuous comparison. Decisions begin earlier, resolve later and remain conditional longer. Confidence no longer stabilizes at inquiry, application or even enrollment. It stabilizes only when cost, convenience and career alignment are continuously evaluated and validated by students. This evaluation and validation cycle continues up until their graduation and even beyond.

The 2026 Modern Learner Report makes clear the transformation of the Modern Learner experience and provides a new framework for what's next in higher education.

Learner behavior has evolved faster than enrollment architectures can absorb. The resulting friction and inefficiencies fail both student and institution. The 2026 Modern Learner Report re-envision the enrollment funnel and incorporates an orbit-based model that more accurately reflects how Modern Learners search, evaluate, commit and persist.

This report goes beyond tactical checklists and menus of quick fixes. Instead, it provides a new organizing logic—one that allows leaders to reinterpret existing data, realign strategy and restore predictability in a decision system that has already changed.

The New Enrollment Model outlined here is not aspirational. It is descriptive. It is already operating. And, the organizations that thrive in the reshaped world will be those that fully embrace and adapt to this new reality.



The New Enrollment Model Has Arrived

For decades, enrollment strategy was built on the assumption that institutions controlled information. Comparison was costly. Institutions controlled sequencing. Decisions resolved slowly and learners moved predictably from awareness to inquiry to application to enrollment. All of this happened on a predetermined timeframe around milestones like high school graduation.

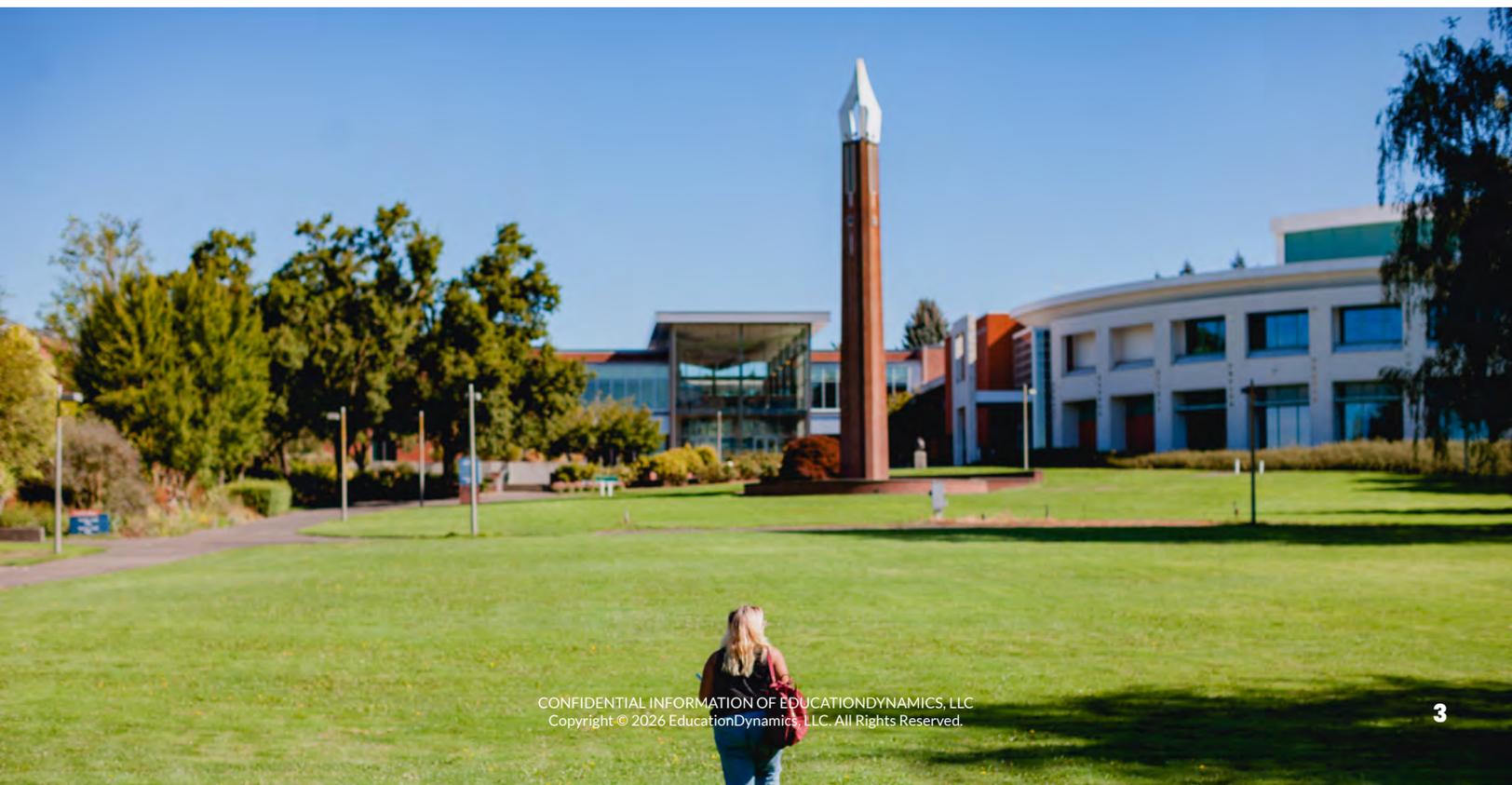
Under those conditions, the traditional enrollment funnel worked. Today, those conditions are gone. The Modern Learner's decision-making process has been accelerated, which has caused destabilization.

Modern Learners do not experience enrollment as a sequence of resolved stages. They experience it as a continuous decision environment—one shaped by abundant information served up through algorithmic mediation and forged by economic pressure and a sense of elevated personal risk.

They gather information from a multitude of independent sources. They validate claims continuously. They revisit decisions repeatedly. Modern Learners retain decision authority far longer than legacy models anticipate. They do not wait and are not constrained by pre-defined norms.

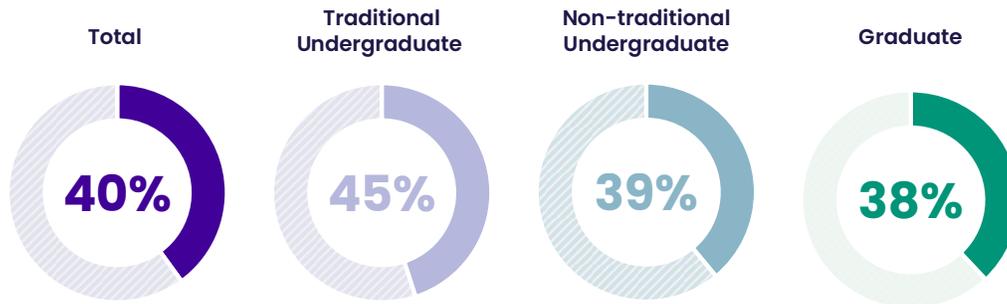
This is not confusion.

It is adaptation.



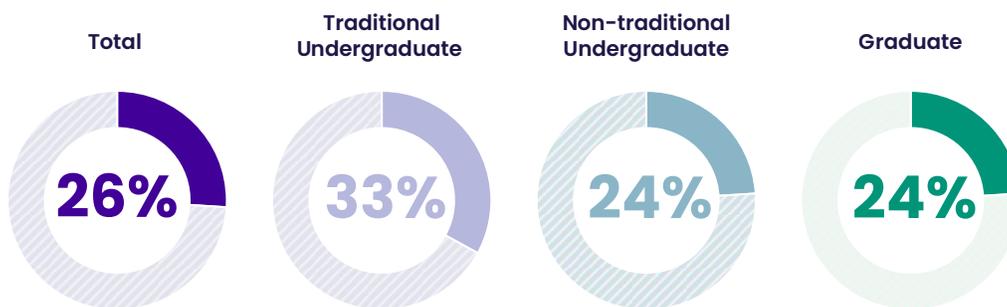
Where the Model Break Becomes Visible

Learners Who Considered Additional Schools After Initial Inquiry



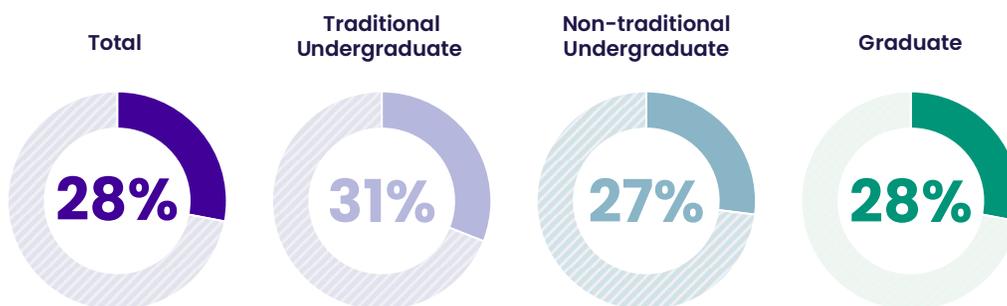
Inquiry no longer represents narrowing certainty. Instead, it often triggers expansion of consideration as learners test alternatives, validate tradeoffs and recalibrate fit.

Learners Who Continued Exploring Other Schools After Applying



Application submission no longer signals commitment. For a substantial share of learners, it is a checkpoint, not a conclusion.

Learners Who Continued Researching Other Schools After Enrolling



Even enrollment no longer guarantees resolution. Commitment now stabilizes later—sometimes well after classes begin.

Taken together, these figures do not indicate indecision. They show that decisions no longer resolve at the moments institutional systems were designed to measure.

Why This Creates Structural Tension

Institutions continue to operate enrollment systems that were designed for a different decision economy. Those systems rely on performance measures that assume linear progress and clear resolution—metrics such as inquiry-to-application conversion, application-to-enrollment yield, speed-to-contact and time-bound progression through the funnel.

Yet learner behavior no longer conforms to the assumptions underlying those metrics. Modern Learners decide earlier in the process, remain open to change longer and validate their choices continuously as new information becomes available. Decision-making does not resolve at the points institutions have historically measured, even when institutional execution is strong.

The result is a growing disconnect between performance indicators and actual outcomes. Institutions can improve reported metrics while still experiencing greater instability in yield, persistent melt and rising early attrition. Marketers and legacy agencies tasked with enrollment growth point to these irrelevant KPIs as evidence of action and activity, but ignore the real impact of frameworks that no longer align to how Modern Learners behave.

The issue goes deeper than execution.

It is a fundamental change in the underlying reality.

Why This Shift Is Irreversible

This shift in learner behavior is not cyclical, nor is it reversible. This transformation is driven by a set of structural forces that have fundamentally altered how decisions are formed. First, information is abundant. Learners no longer depend on institutions to interpret options, frame tradeoffs or define the boundaries of consideration. Second, decision authority has moved upstream. Elimination now occurs before inquiry without direct institutional engagement. Finally, trust has replaced persuasion as the binding constraint. Commitment forms when confidence stabilizes through validation and verification—not because of a contact strategy or an accelerated outreach timeline.

Higher education's legacy enrollment systems were built for a different decision environment—one in which institutions controlled access to information, sequencing of engagement and the timing of resolution. That environment is gone. The New Enrollment Model begins by realigning strategy to how Modern Learners decide.





Cost, Convenience and Career are no longer differentiators

— they are threshold conditions

With the evolution of learner behavior, a new organizing system replaced persuasion-led enrollment logic. That system is governed not by influence, but by constraints. Modern Learners evaluate institutions through a set of continuously running filters that assess feasibility rather than preference. They appraise whether a program is affordable without unacceptable risk, whether it can fit into the realities of their lives without disruption and whether it reliably advances them toward their intended career outcomes. Together, Cost, Convenience and Career form the Three Cs in the enrollment decision-making process.

These considerations do not function as weighted preferences that can be overcome through messaging or engagement. They are non-negotiable conditions. When an institution fails to satisfy any one of them, it is removed from consideration—often before inquiry occurs and often without any signal back to the institution.



The System Revealed in the Data

Top Reasons Learners Choose to Inquire

Reasons for Inquiring at Schools	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
Affordability	66%	63%	69%	63%
Programs offered	49%	51%	49%	48%
Scholarships offered	42%	56%	37%	39%
Had program format or modality that interested me	35%	23%	38%	41%
Its values matched my own	33%	32%	28%	39%
Overall reputation of school	30%	39%	26%	30%
Ease of finding information on school/program webpage	29%	23%	30%	32%
Ease of admission	28%	28%	30%	26%
Proximity to home/work	22%	29%	18%	24%
Reputation of specific program	22%	29%	19%	22%
Testimonials from current/past students	20%	20%	17%	23%
Quality of faculty	19%	21%	16%	23%
Credit acceptance policies	19%	17%	18%	21%
Familiarity with school	18%	28%	15%	14%
Videos on the school/program website	11%	10%	10%	14%
Ease of finding financial information on school webpage	11%	10%	11%	13%
Testimonials from employers	10%	7%	9%	13%
Blog posts on the school/program website	7%	6%	6%	9%
Something else	1%	1%	1%	0%

Cost transparency, flexibility and career alignment consistently appear as early drivers—not late-stage persuasion points.

Top Reasons Learners Do Not Inquire

Reasons for Not Inquiring at Schools	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
Cost of tuition and fees	60%	61%	62%	55%
I did not feel school was a better fit	30%	37%	27%	30%
Lack of credit acceptance	21%	18%	21%	25%
I felt the major was stronger at enrolling school or overall enrolling school is stronger academically	21%	21%	19%	24%
School did not offer my major/changed mind about major	21%	21%	20%	22%
School did not hold a high reputation among my friends and family	17%	20%	14%	19%
I decided not to continue college study at this time for a personal reason	13%	9%	14%	16%
Prefer to attend school where coworkers attended, family members or friends attend	9%	9%	7%	10%
Other	2%	3%	2%	2%

Cost concerns are the biggest reason why students eliminate schools from consideration before institutions are afforded an opportunity to engage.



Reasons Learners Consider Additional Schools

Reasons for Considering Additional Schools	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
Cost	62%	63%	65%	57%
Program length	38%	22%	42%	45%
Lack of flexibility in the programs (could not take courses on my schedule)	26%	20%	27%	31%
Inability to use federal financial aid	21%	17%	23%	21%
Did not have the modality/format of interest (online, hybrid, classroom, etc)	18%	10%	19%	23%
Schools did not offer my major/changed mind about major	16%	16%	16%	15%
Schools took too long to respond to questions	13%	12%	12%	16%
Contact from staff did not meet my needs	13%	11%	12%	14%
I did not feel the schools were academically strong	12%	16%	10%	11%
Contact from staff did not answer my questions	10%	7%	9%	15%
Schools did not hold a high reputation among my friends and family	9%	11%	8%	8%
Contact from faculty did not meet my needs	8%	9%	6%	10%
Contact from professors did not answer my questions	8%	7%	6%	10%
Prefer to attend school where coworkers attended, family members or friends attend	6%	10%	3%	6%
Other	3%	6%	1%	2%

Convenience factors such as modality and format, schedule flexibility and program length lead students to re-open their consideration set.



Why the Three Cs Became Dominant

The rise of the Three Cs accelerated when learners gained the ability to independently evaluate cost, convenience and career alignment. Economic pressure heightened sensitivity to downside risk, while artificial intelligence reduced the cost of comparison to near zero. What previously required persuasion and reassurance now results in total elimination, before institutions have the opportunity to engage.

Although institutions continue to communicate within a legacy system of their own design, learners make decisions inside an entirely different one.

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Prefer to attend school where coworkers attended, family members or friends attend	6%	10%	3%	6%
Other	3%	6%	1%	2%

When selecting non-degree options, learners across segments overwhelmingly cite time, convenience and cost as the dominant drivers of decision-making. These factors consistently outweigh traditional indicators of quality or signaling, including outcomes, testimonials or employer recommendation.

Importantly, this pattern holds even among traditional undergraduates, who are often assumed to be less constrained. Their elevated sensitivity to time and cost reflects not diminished ambition, but heightened awareness of risk in an uncertain economic environment.

In this context, the Three Cs no longer operate as differentiators to be marketed. They function as threshold conditions. Programs that fail to clear them are removed from consideration before any narrative about mission, rigor or value can be heard.

The Strategic Consequence

Under the legacy enrollment model, institutions reasonably assumed that cost could be contextualized later in the process, that convenience could be negotiated as commitment deepened and that career outcomes could serve as late-stage persuasion. In the modern decision environment, those assumptions no longer hold. Cost now governs whether inquiry happens at all, convenience determines whether participation is feasible and career clarity stabilizes commitment early in the journey.

This is a systemic reordering of the student decision logic. The Three Cs are no longer one theme among many; they are the operating system within which enrollment now functions. They shape how artificial intelligence evaluates institutions, how reputation is validated, why orbit behavior emerges, where flexibility matters, how career alignment stabilizes confidence and ultimately whether retention succeeds or fails.





Reputation has shifted from brand asset to real-time system validation

For much of higher education's history, reputation functioned as accumulated equity. It changed slowly, remained resilient in the face of inconsistency and was shaped largely by institutional narrative. That model made sense in an era when claims were rarely audited in real time and external validation was limited.

That era has ended.

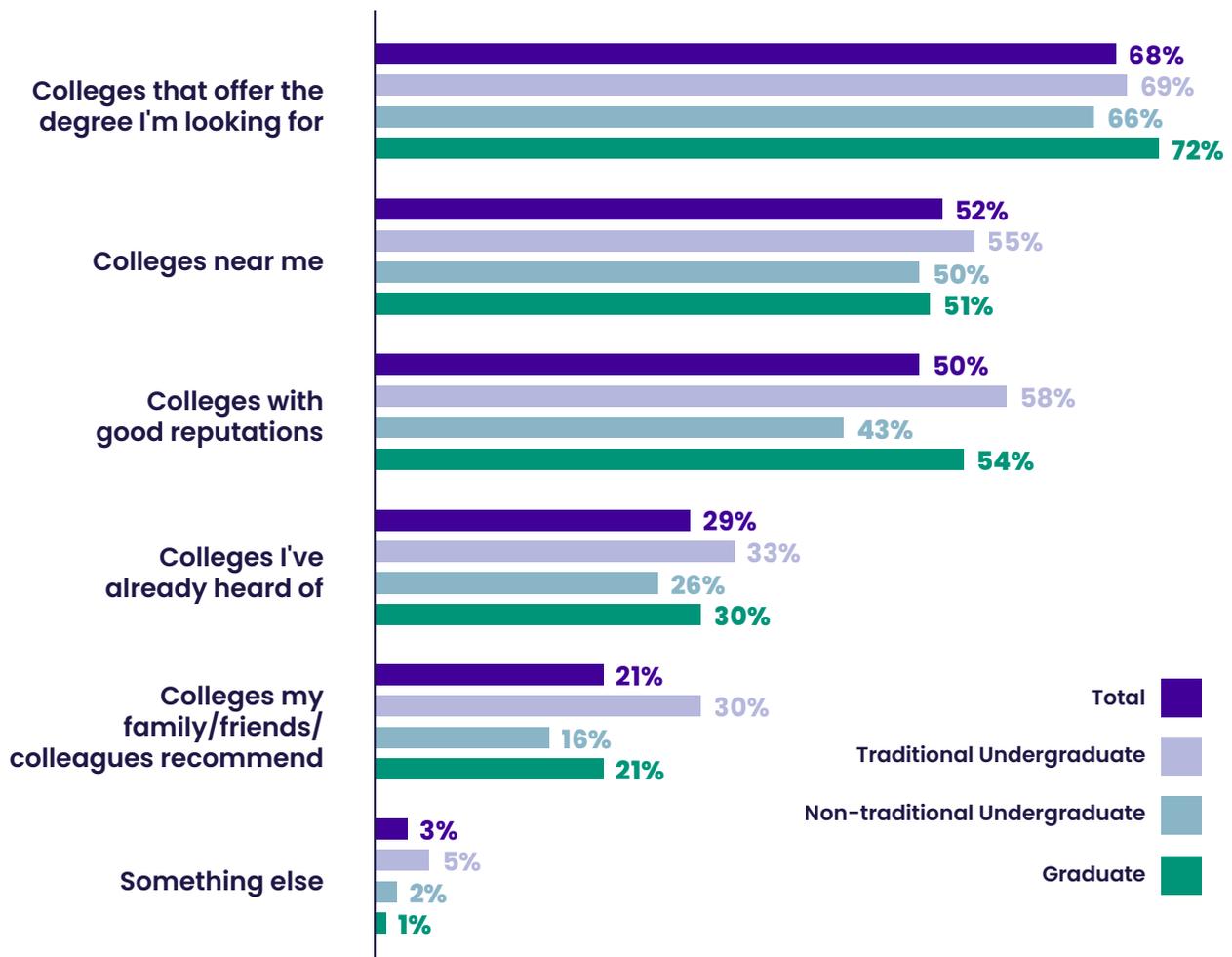


Reputation Now Behaves Like a Dynamic System

Modern Learners no longer see institutional reputation as a narrative to be accepted, but as a signal that must be continuously validated. They test institutional claims against AI-generated summaries, peer experiences, third-party reviews, outcome data and employer perception. This validation begins before inquiry, continues throughout the consideration and application phases and often persists even after enrollment. Reputation loss appears not as dissatisfaction, but as absence. Learners quietly remove institutions from consideration when signals conflict or risk appears.

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Importance of Institutional Reputation in Initial School Search

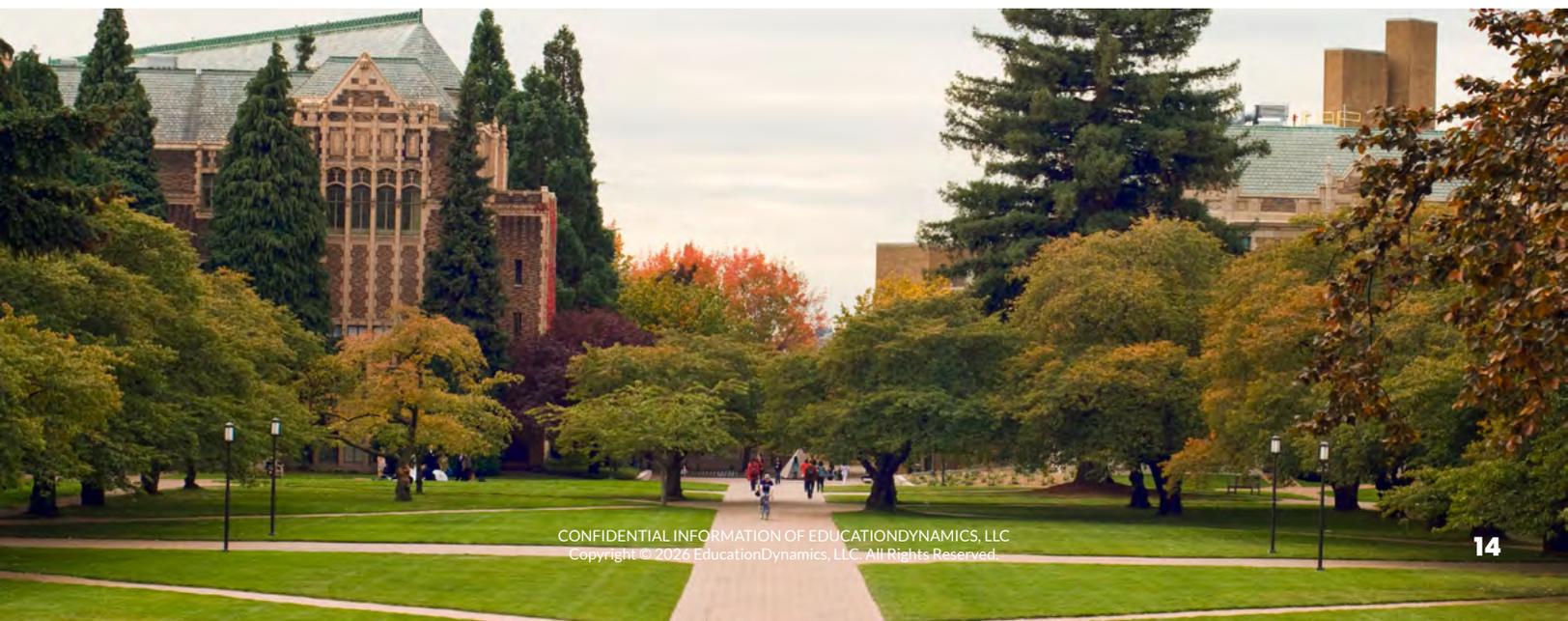


This figure establishes reputation as an early-stage filter—not a late-stage differentiator.

Reasons Learners Choose Not to Apply After Inquiring

Reasons for Not Applying	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
Cost	56%	60%	56%	54%
Lack of flexibility in the programs (could not take courses on my schedule)	28%	14%	30%	37%
Program length	22%	9%	23%	31%
Inability to use federal financial aid	20%	15%	21%	23%
Did not have the modality/format of interest (online, hybrid, classroom, etc)	20%	11%	22%	23%
I felt the major was stronger elsewhere	18%	25%	14%	18%
I enrolled at my first-choice school/felt enrolling school was a better fit	16%	23%	14%	15%
Schools did not offer my major/changed mind about major	11%	12%	12%	10%
Contact from staff did not meet my needs	10%	11%	9%	12%
Schools did not hold a high reputation among my friends and family	9%	16%	5%	8%
Contact from staff did not answer my questions	8%	8%	8%	8%
Schools took too long to respond to questions	8%	7%	7%	9%
Contact from faculty did not meet my needs	7%	7%	6%	7%
Contact from professors did not answer my questions	5%	4%	4%	6%
Prefer to attend school where coworkers attended, family members or friends attend	4%	5%	4%	5%
Other	3%	6%	2%	1%

Reputation erosion compounds later in the process. Learners who detect inconsistency after inquiry do not escalate concerns—they disengage.



Inconsistency Now Carries More Weight

Search Everywhere is the new reality. Modern Learners conduct their research across multiple media channels. This forces institutions to operate across an expanding number of media platforms, including websites, paid media, social media, AI-generated summaries, peer discourse and more. In this environment, small inconsistencies—differences in tuition ranges, modality definitions, timelines, or outcome claims—carry disproportionate weight. Learners interpret inconsistency not as nuance, but as risk. And within the modern decision system, risk is incompatible with continued consideration.

Reputation as an Enterprise System

Under the New Enrollment Model, reputation can no longer be managed solely as a brand asset. It must function as an enterprise-wide system shaped by policy alignment, operational clarity, data governance, staff training and external validation. Legacy reputation systems were built for a slower, less audited environment. However, that operating context changed.

Reputation as the Trust Layer of the Three Cs

Reputation now serves as the trust layer beneath cost, convenience and career alignment. Cost credibility depends on transparency and consistency. Convenience credibility depends on operational truth. Career credibility depends on outcomes that learners can independently verify. When reputation destabilizes, it is a failure of brand verification. In the modern system, reputation does not merely persuade; it opens the door to consideration.





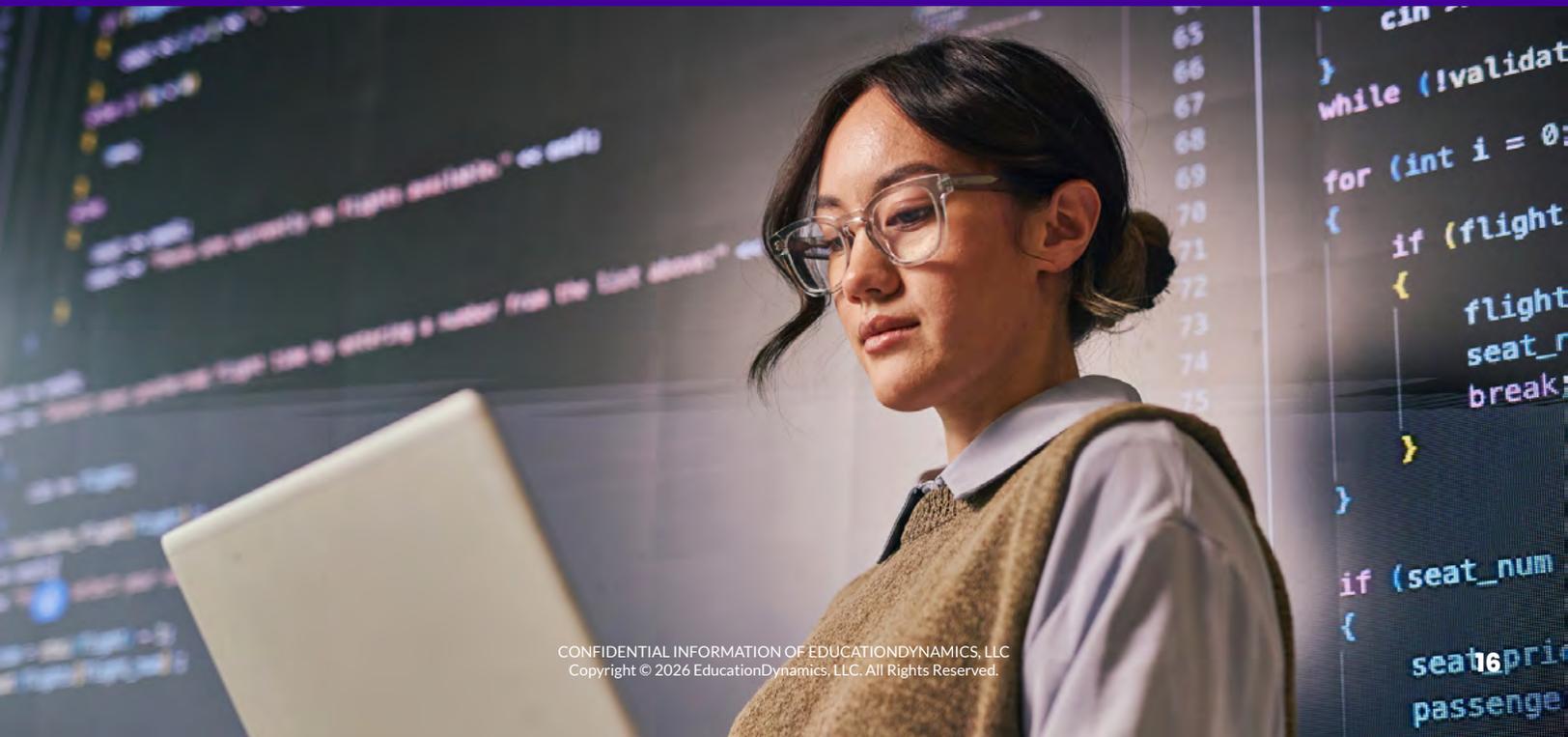
Career Clarity is the Center of Gravity that Stops Learners from Re-Evaluating

Career outcomes have moved to the center of the decision-making process because learners reorganized how they evaluate value under increased economic pressure and with greater access to information.

Learners no longer respond to career outcomes offered as reassurance late in the process. In a decision environment defined by higher cost sensitivity, greater opportunity cost and continuous comparison, career alignment centralizes as a core justification for entering the process at all.

This shift is not ideological.

It is economic.



Career Logic Now Organizes the Journey

Modern Learners do not begin the enrollment process by asking which schools they like. They begin by asking whether a pathway is worth pursuing. Career intent now organizes the journey from the outset, shaping how learners search, which institutions survive early elimination, how trust forms and when commitment ultimately stabilizes.

Primary Career Objectives of Learners

Career Objective	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
To start a new career to earn more money	39%	36%	45%	32%
To start a new career more aligned with my interests	26%	27%	25%	26%
To get my first professional/salaried job	13%	27%	9%	8%
To increase my salary within my current profession	7%	1%	6%	13%
To get a promotion within my current profession	7%	1%	5%	13%
I am concerned about AI replacing my job	3%	2%	3%	4%
It is required by my employer/to keep my current job	1%	0%	1%	1%
Something else:	3%	3%	3%	1%
I do not have a career objective for this degree	2%	2%	2%	1%

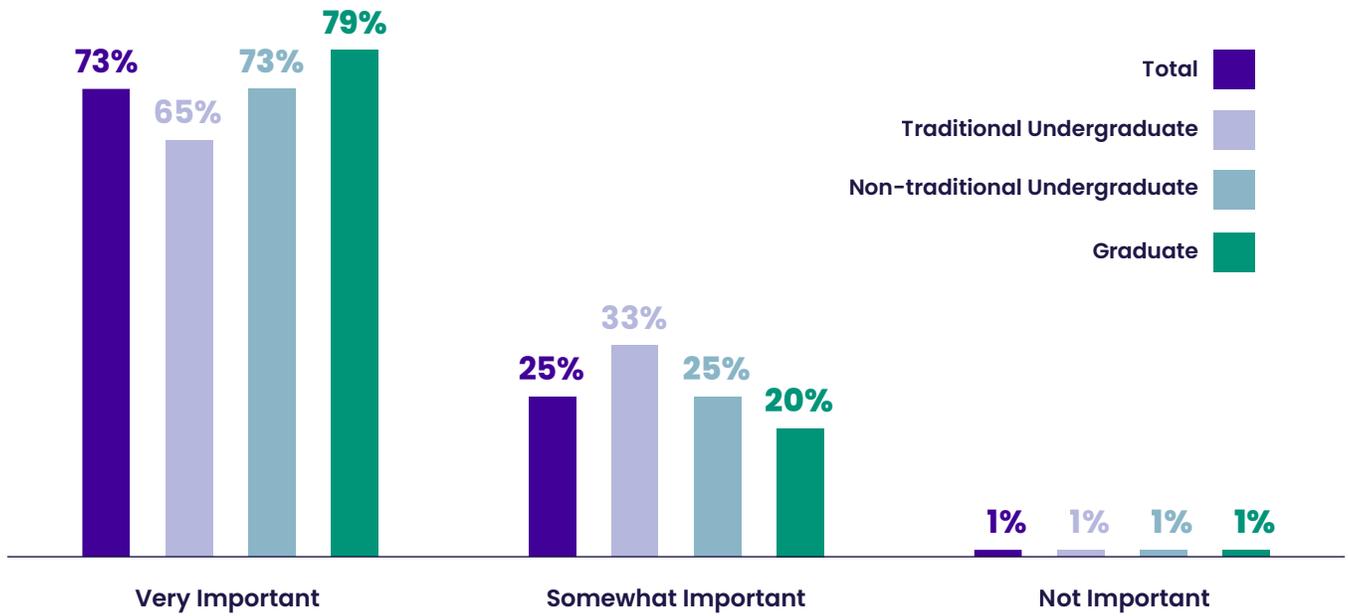
Modern Learners enter the process with explicit outcome goals, not vague aspirations.

Importance of Career-Related Factors in Choosing a School

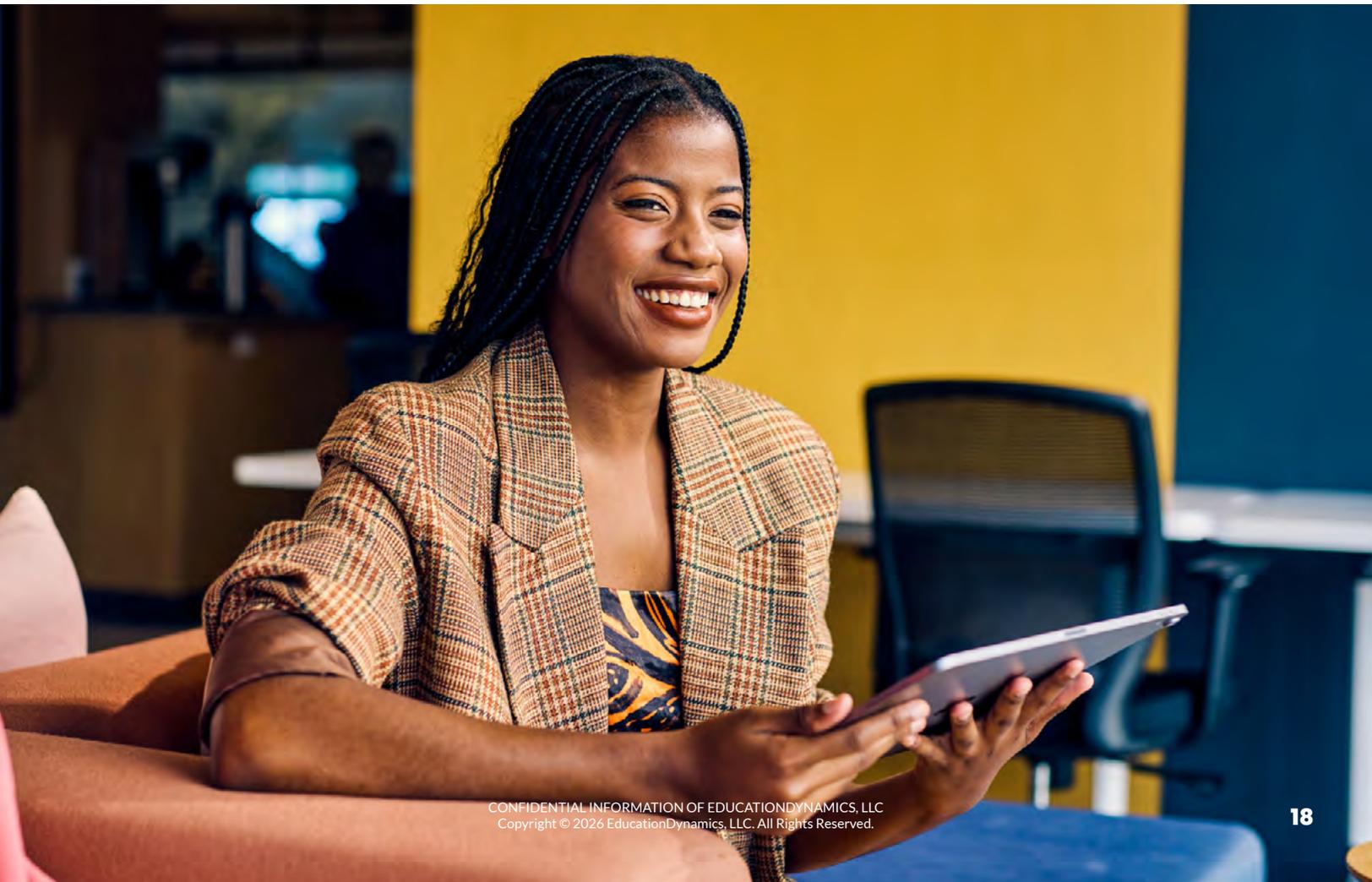
Career-related Factors	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
Career services and support	47%	45%	45%	50%
Job placement rates	47%	50%	48%	42%
Earning potential of graduates	45%	41%	44%	49%
Expected longevity of employment or my job	41%	37%	42%	41%
Internship/co-op opportunities	32%	51%	25%	29%
Employer partnerships	30%	25%	29%	35%
Industry-relevant curriculum	29%	25%	27%	34%
Alumni success stories	16%	23%	14%	14%
Other	2%	4%	2%	1%

Career alignment appears not as a differentiator, but as a prerequisite for consideration.

Career Outcomes Provide a Stabilizing Anchor Across Learner Types



In an orbit-based decision system, learners require an anchor—signals strong enough to withstand repeated comparison and reconsideration. Career alignment provides that anchor.



Career Alignment as a Confidence Stabilizer

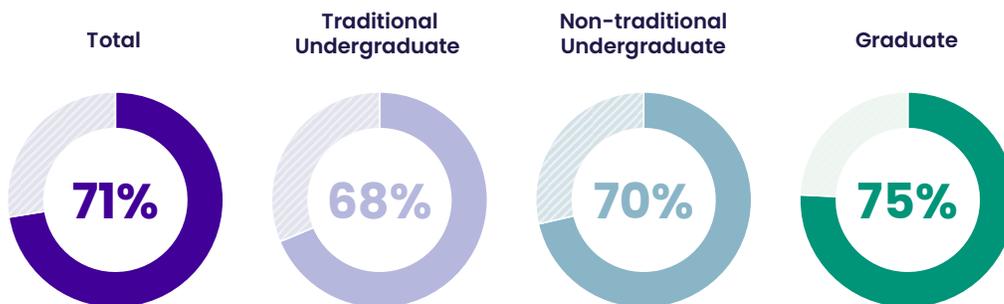
Career alignment anchors an orbit-based decision system. When learners can clearly connect curriculum to skills, skills to roles and roles to advancement, their orbit tightens and confidence stabilizes. When that connection remains ambiguous, reconsideration accelerates even if other elements of the offer remain attractive.

This dynamic explains why learners continue researching after application, compare offers even after acceptance and switch institutions early in the lifecycle. These behaviors do not reflect indecision. They comprise a rational search for outcome certainty.

The Natural Evolution of Admissions

As career logic moved earlier in the decision process, the role of admissions evolved to fit the new system. Learners increasingly expect admissions teams to understand their career goals, translate academic programs into concrete outcomes, contextualize return on investment and explain employer relevance. This shift demands alignment between institutional roles and how learners now evaluate value.

Admissions Counselors Add More Value as Early-Stage Career Counselors



Modern Learners now arrive with defined goals and require support to validate alignment. Therefore, they place more value on engagement with admissions counselors that serve as early-stage career counselors who help the student anchor career outcomes to the decision making process. This is role alignment with the modern decision system.

Communicating Early is not Over-Promising

Institutions often hesitate to emphasize career outcomes early in the enrollment process out of concern for risk. This ultimately creates even greater vulnerabilities. When institutions delay career clarity, learners fill the gap using AI tools, peer networks and third-party sources. Those sources may lack institutional nuance, but they shape decisions nonetheless. Institutions that fail to communicate career outcomes quickly fall out of the decision set.



Flexibility has become Infrastructure

**– the mechanism that keeps
learners in orbit**

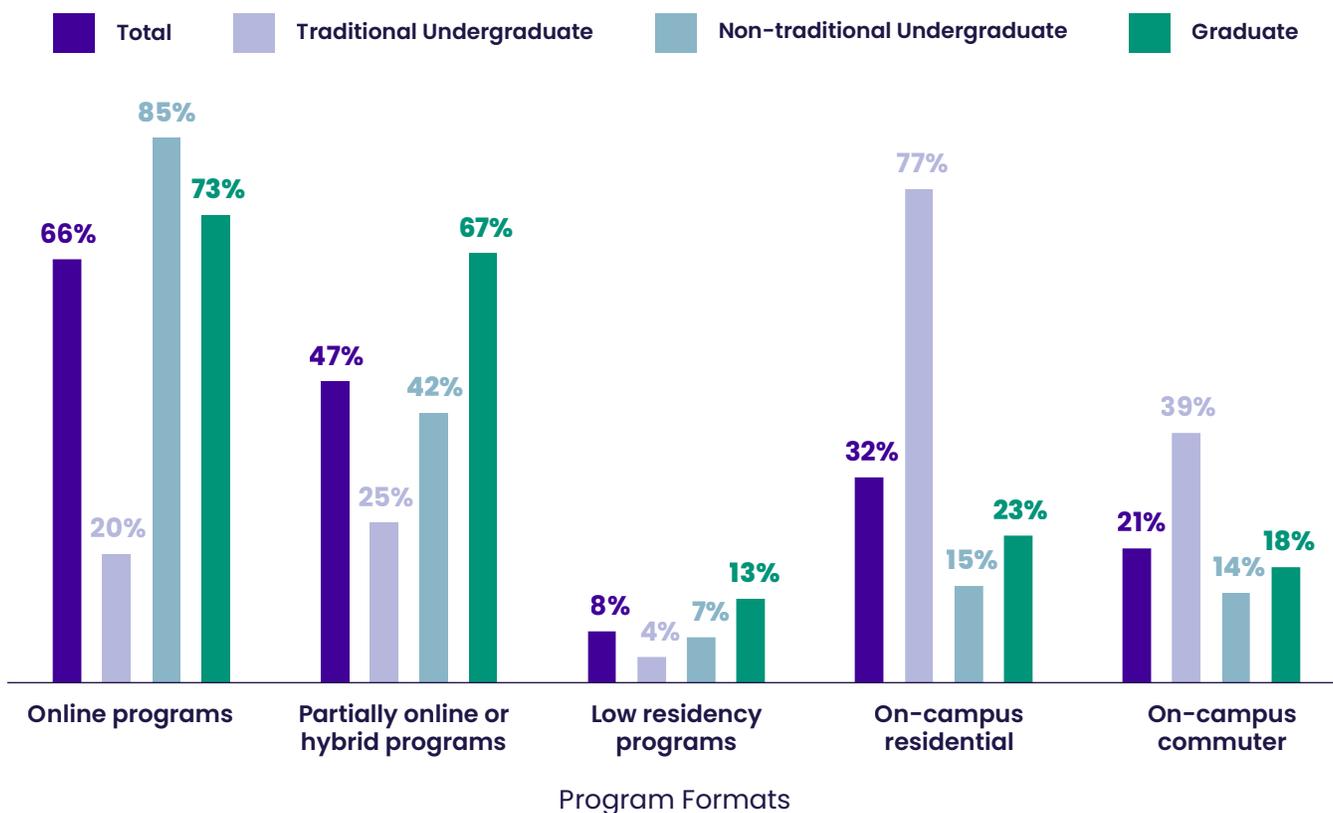
Flexibility and convenience have emerged as binding constraints in Modern Learner decision-making. As learner demographics diversified and life complexity increased, the feasibility of participation—rather than the appeal of programs—moved to the center of the enrollment equation. Flexibility is now the primary mechanism through which learners determine whether enrollment is even possible.



Flexibility as Feasibility, Not Preference

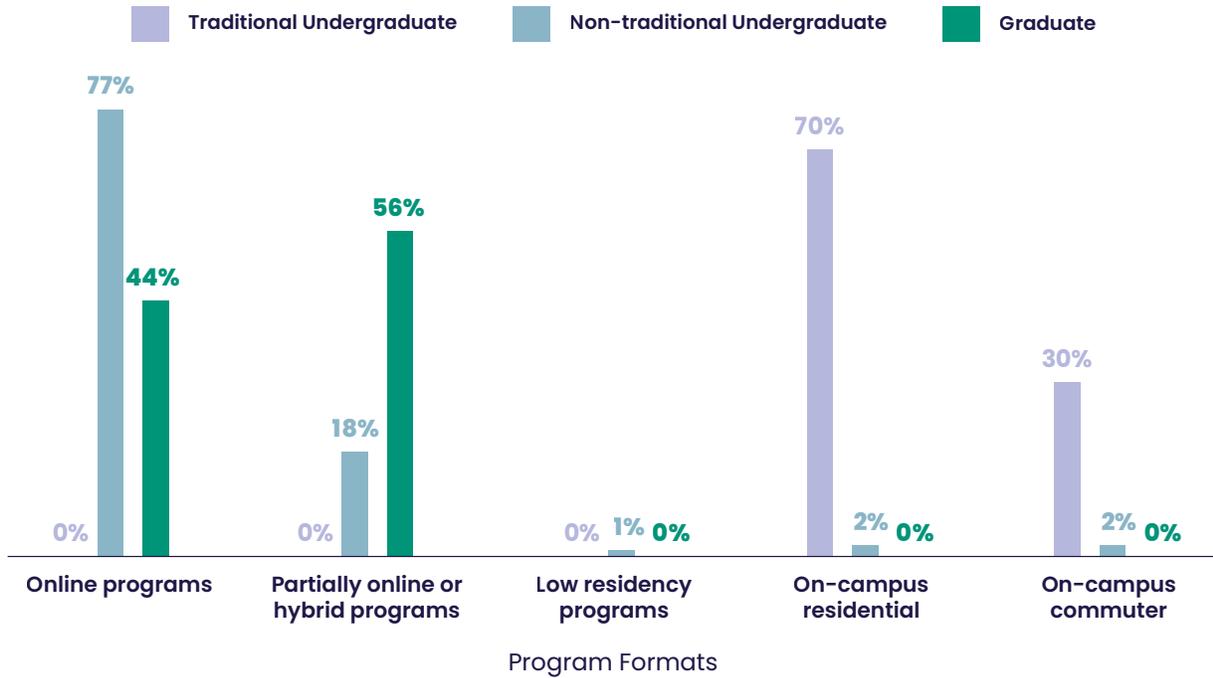
Modern Learners do not ask whether a program is flexible in theory. They need to know whether it will fit into their lives with limited disruption. Program modality, pacing, duration and start timing now function as gatekeeping variables rather than optional features. When these elements fail to align with lived realities, institutions are dropped from the consideration set.

Program Formats Considered by Learners



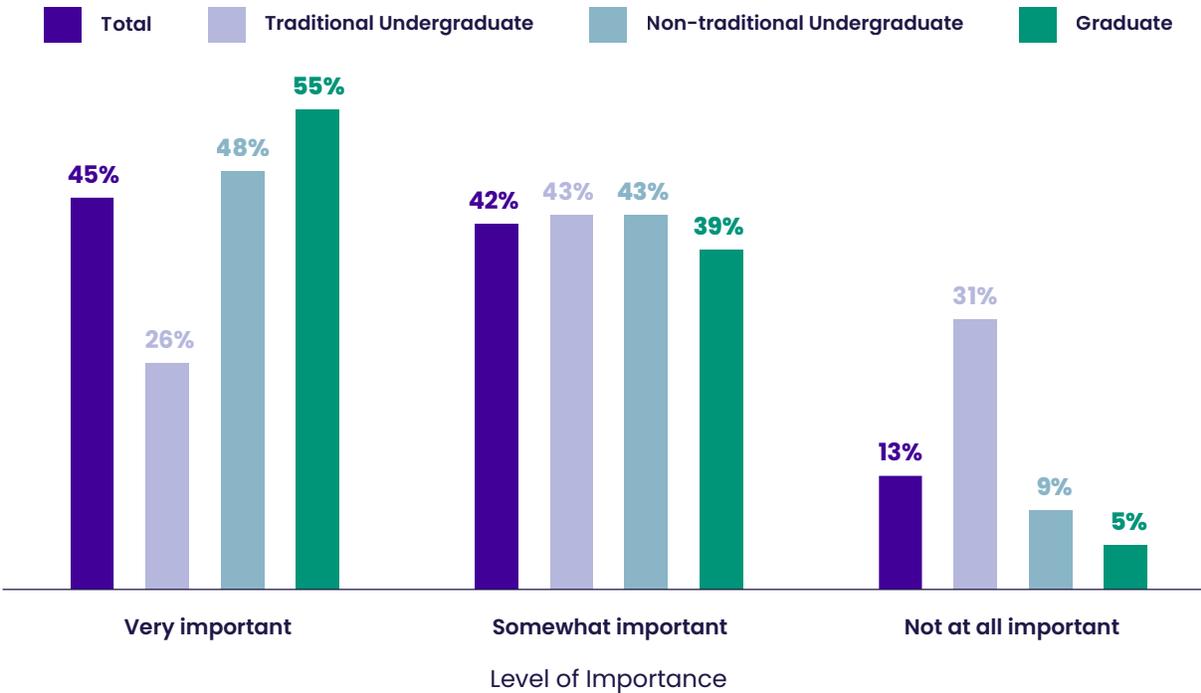
Modern Learners evaluate multiple delivery models early, treating modality as a feasibility test rather than a preference.

Program Formats Enrolled In



The comparison between exploring and enrolling reveals where flexibility constraints force compromise—or trigger exit.

Importance of Near-Term or Flexible Start Dates

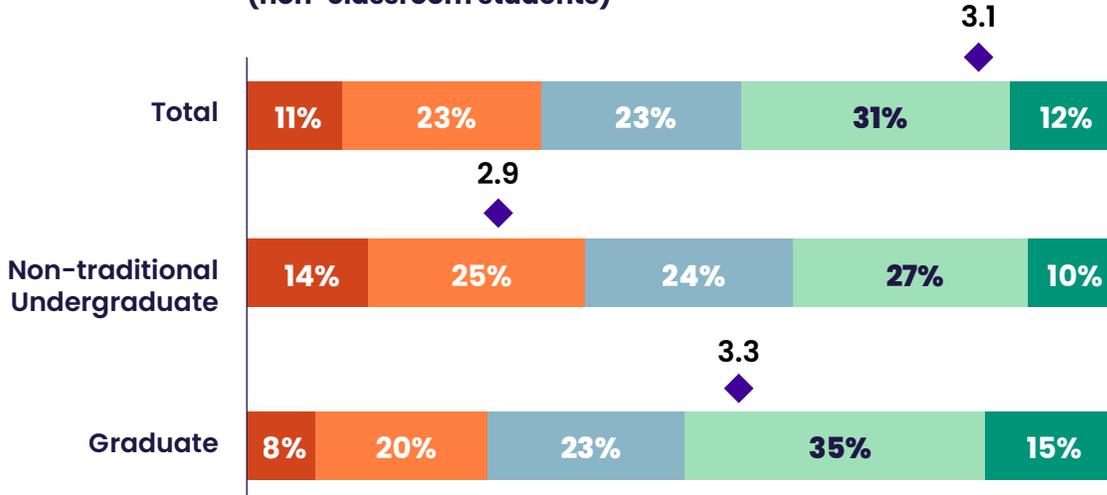


Start timing emerges here as a decisive factor, not a scheduling detail.

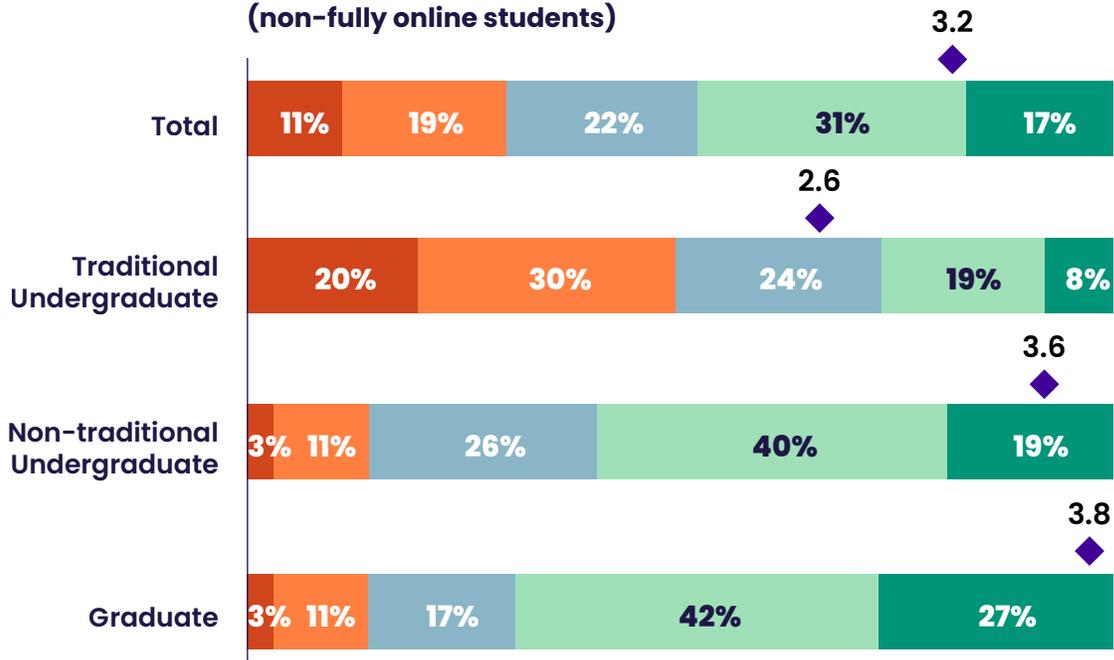
Likelihood of Switching Schools Due to Format or Scheduling Limitations

■ Definitely not
 ■ Probably not
 ■ Not sure
 ■ Probably would
 ■ Definitely
 ◆ Average Rating

Likelihood of Choosing Classroom Format (non-classroom students)



Likelihood of Choosing Fully Online Format (non-fully online students)



Rigidity does not merely reduce satisfaction. It actively destabilizes enrollment.

Flexibility is Non-Negotiable

Several structural forces converged to make flexibility a binding constraint. Work and caregiving responsibilities intensified, opportunity costs increased, dual/concurrent enrollment accelerated academic readiness and alternative providers expanded expectations around access and flexibility. In this environment, rigidity signals risk. Learners interpret inflexible structures not as a sign of academic rigor, but as misalignment with lived reality.

Flexibility and Orbit Stability

Flexibility plays a unique role in an orbit-based enrollment system. It does not persuade learners to enter consideration; it determines whether they remain within gravitational range once they do. When flexibility breaks down, reconsideration accelerates, confidence begins to decay and competing institutions re-enter the decision set. This is why flexibility correlates not only with enrollment outcomes, but with yield stability, melt reduction, early persistence and ultimately lifetime value.

Flexibility as Strategic Infrastructure

Under the New Enrollment Model, flexibility must be understood as a structural design choice, a revenue stabilizer and a risk-mitigation mechanism. This reframing recognizes that flexibility now governs feasibility rather than satisfaction. The system changed and flexibility became foundational.





AI is now the front door

– and it filters based on the Three Cs

For most of higher education’s modern era, institutions operated under the assumption that they controlled first contact with prospective students. This assumption made sense when information was scarce and controlled by the institution and the comparison process was cumbersome. That world no longer exists. Artificial Intelligence tools and platforms like ChatGPT, Gemini and others have democratized information and accelerated the comparison process.

That world no longer exists.

Artificial Intelligence has restructured the front end of the enrollment journey and Modern Learners have already modified their behavior. In just one year, AI usage among prospective students surged from 68% to 88%. This is more than a shift. It is a regime change. AI platforms and AI Overviews (AIOs) do not function like traditional search engines.

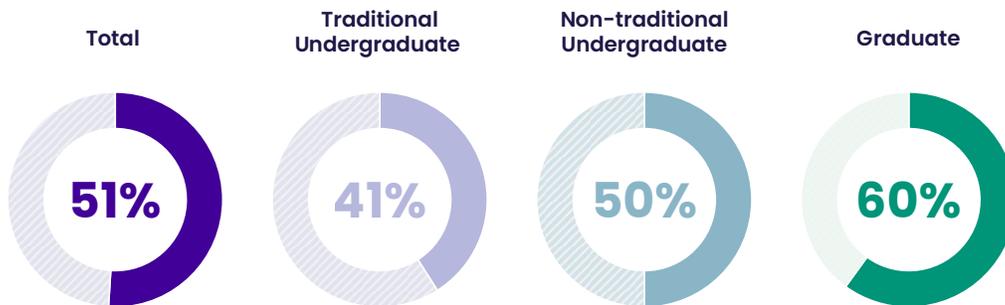
AI doesn’t serve up an exhaustive list of links and options. Instead, it acts as both a filter and an advisor. Modern Learners are embracing AI tools because they quickly and efficiently serve up comprehensive answers faster than traditional options like waiting to speak to admissions advisors. These powerful new tools help Modern Learners compare institutions, narrow consideration sets, understand tradeoffs and validate claims across multiple sources. Importantly, they evaluate cost, fit and potential ROI before they even reach out to the school. Adapting to this new reality requires a new mindset—one which will be uncomfortable for many.

AI Changed the Timing of Decision-Making

By the time a student fills out an inquiry form, the most influential decisions have already been made. The shortlist is mostly set. An institution is either in the running, or erased, often based primarily on how AI interpreted its presence, pricing and positioning.

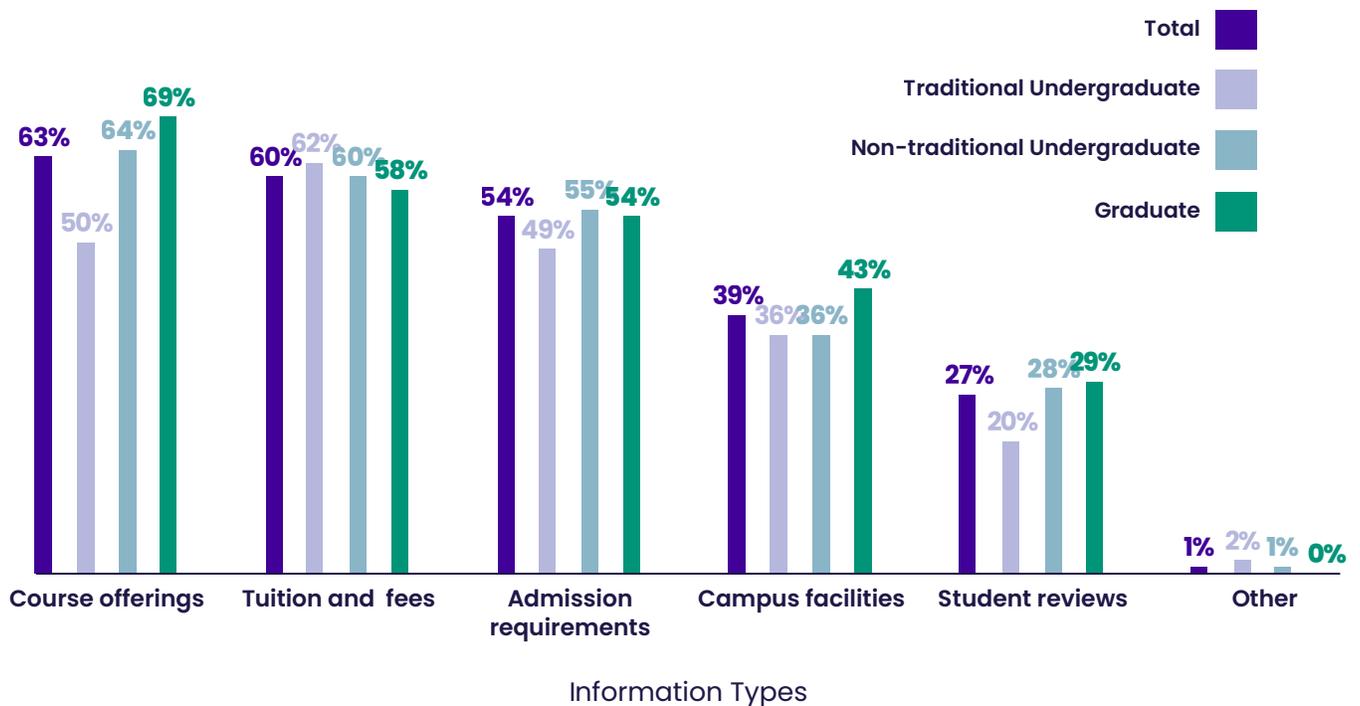
Modern Learners no longer view AI platforms as exploratory or casual. These tools play a critically important role in the decision process.

Learners Who Use AI Tools When Searching for Schools



AI usage is no longer marginal or experimental. It is fully embedded into how learners initiate the search process.

Types of Information Learners Seek via AI



Critically, Modern Learners are not using AI for surface-level browsing. They are asking AI the same questions institutions historically addressed later—often during admissions conversations.

AI as Infrastructure, Not an Overlay

Institutions frequently approach artificial intelligence as a discrete capability: a chatbot to support inquiries, a marketing enhancement to improve engagement or a productivity layer to increase operational efficiency. This aligns with how institutions have historically adopted new digital tools.

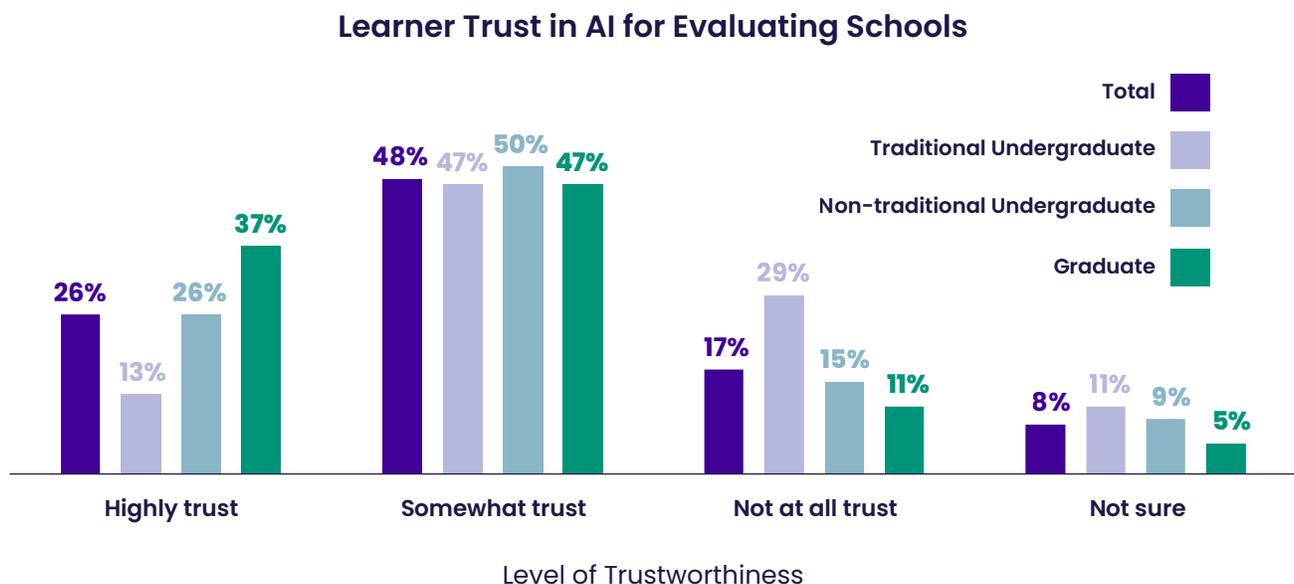
By contrast, learners have embraced it as a new infrastructure for their decision making. They use it continuously to resolve the Three Cs: evaluating affordability, aid and return on investment; assessing whether modality, pacing and start dates fit their lives; and validating whether programs reliably support desired career outcomes and advancement. AI does not persuade or influence. It filters.

Institutional infrastructure is being displaced by AI in the prospective student's journey. The evaluation phase has moved earlier and outward and into media and platforms that institutions do not directly control. The institutions that thrive will be the ones that build AI visibility based on trust and reputation as a core element of their engagement strategy.

Visibility Now Depends on Risk Resolution

Under legacy enrollment models, institutional visibility was driven by brand strength, channel mix and message reach. In the modern decision environment, visibility depends on whether artificial intelligence systems can resolve learner risk with confidence. If AI cannot clearly determine an institution's affordability relative to alternatives, its feasibility within real-life constraints and the credibility of its career outcomes, the institution falls out of consideration.

It is not debated. It is not investigated. It is excluded.



Exclusion happens, not on the basis of ideology or judgement, but to maintain computational efficiency. Learners increasingly treat AI as a credible evaluator, not a novelty. As a result, institutional messaging no longer sets the frame—it must align with it.



The Funnel has Been Transformed

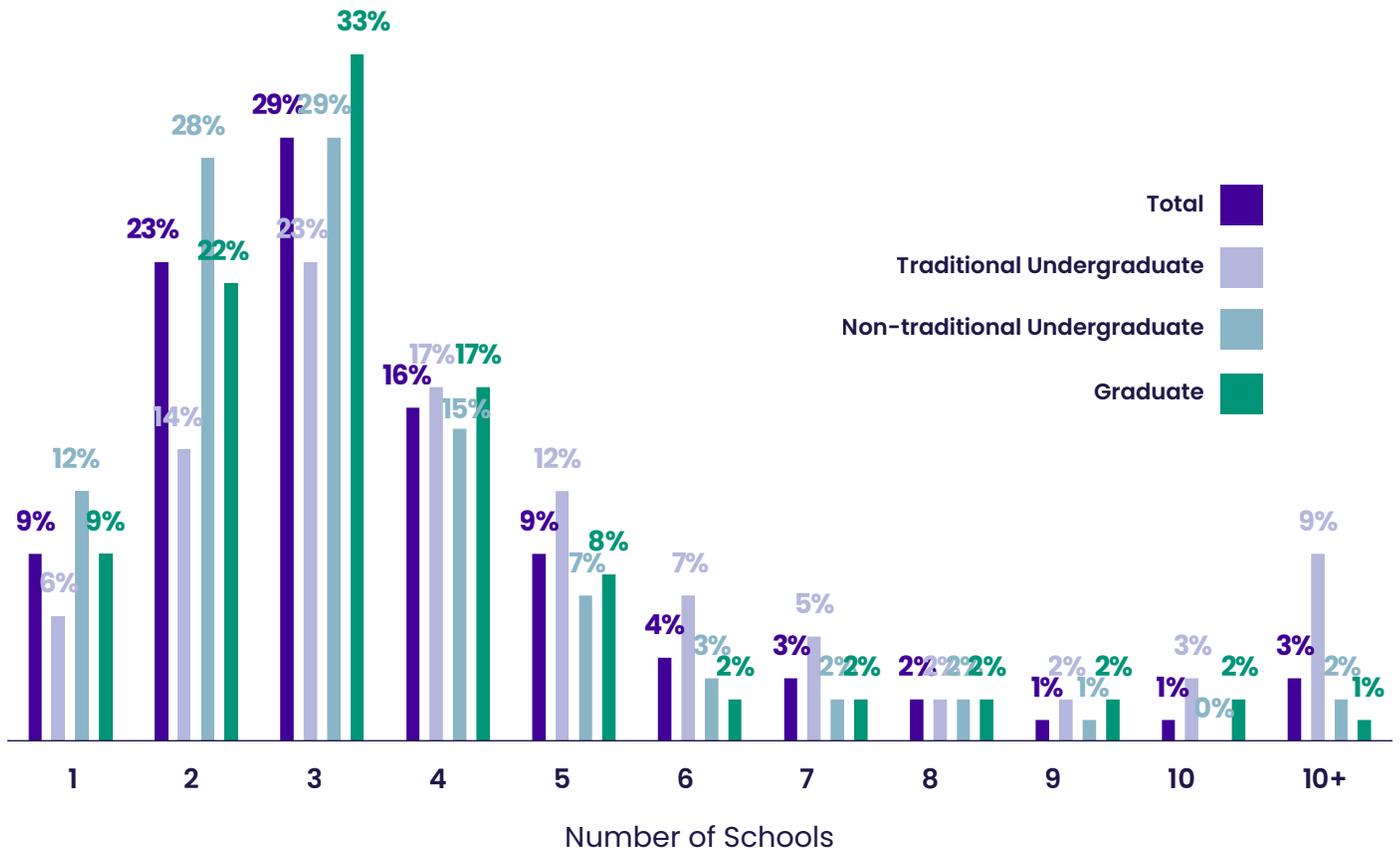
— The Journey Behaves Like an Orbit

The traditional enrollment funnel stopped working because learner decision-making no longer resolves in linear stages. The funnel was an effective abstraction in an environment where information arrived sequentially, comparison required effort and institutions controlled the pace and order of engagement. Within that context, learners moved forward in predictable ways—uncertainty declined as prospective students progressed through the prescribed and predictable journey.

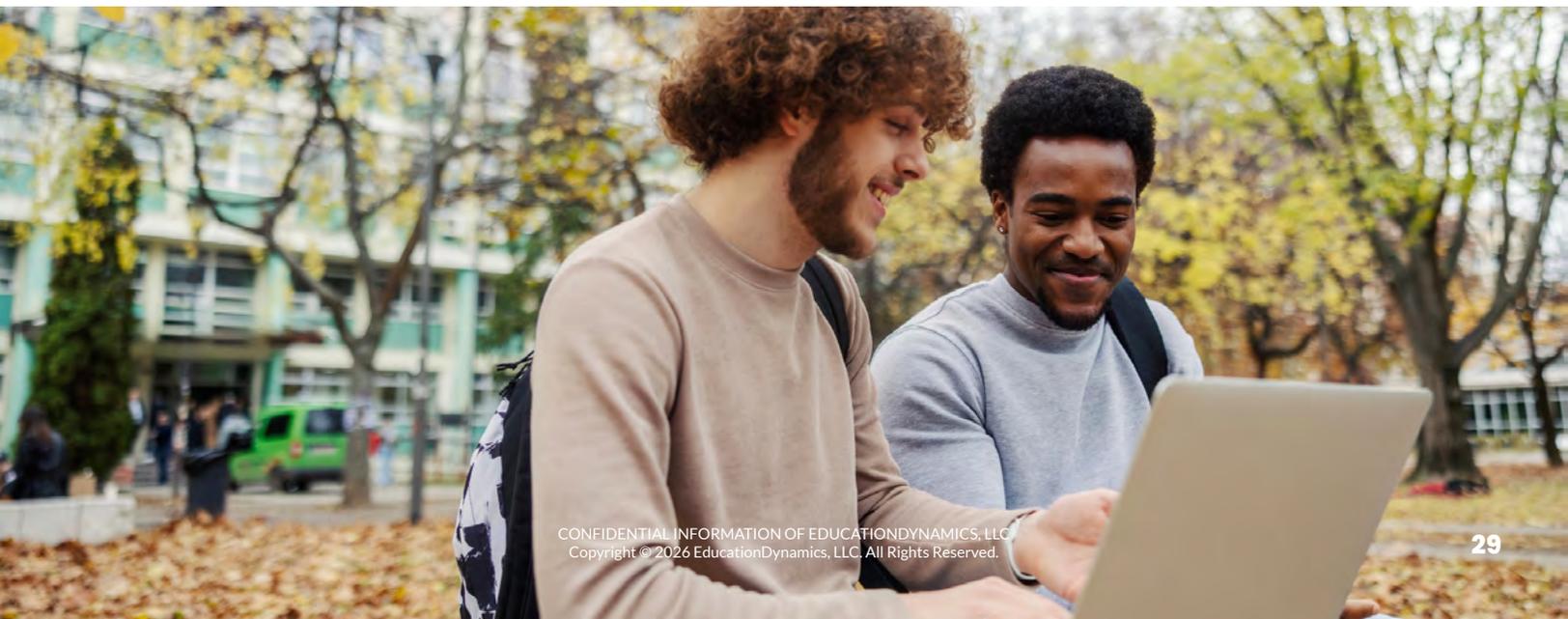
Mapping the Non-Linear Journey

Modern Learners do not move cleanly from awareness to commitment. They cycle, pause, return and reassess as new information enters the system.

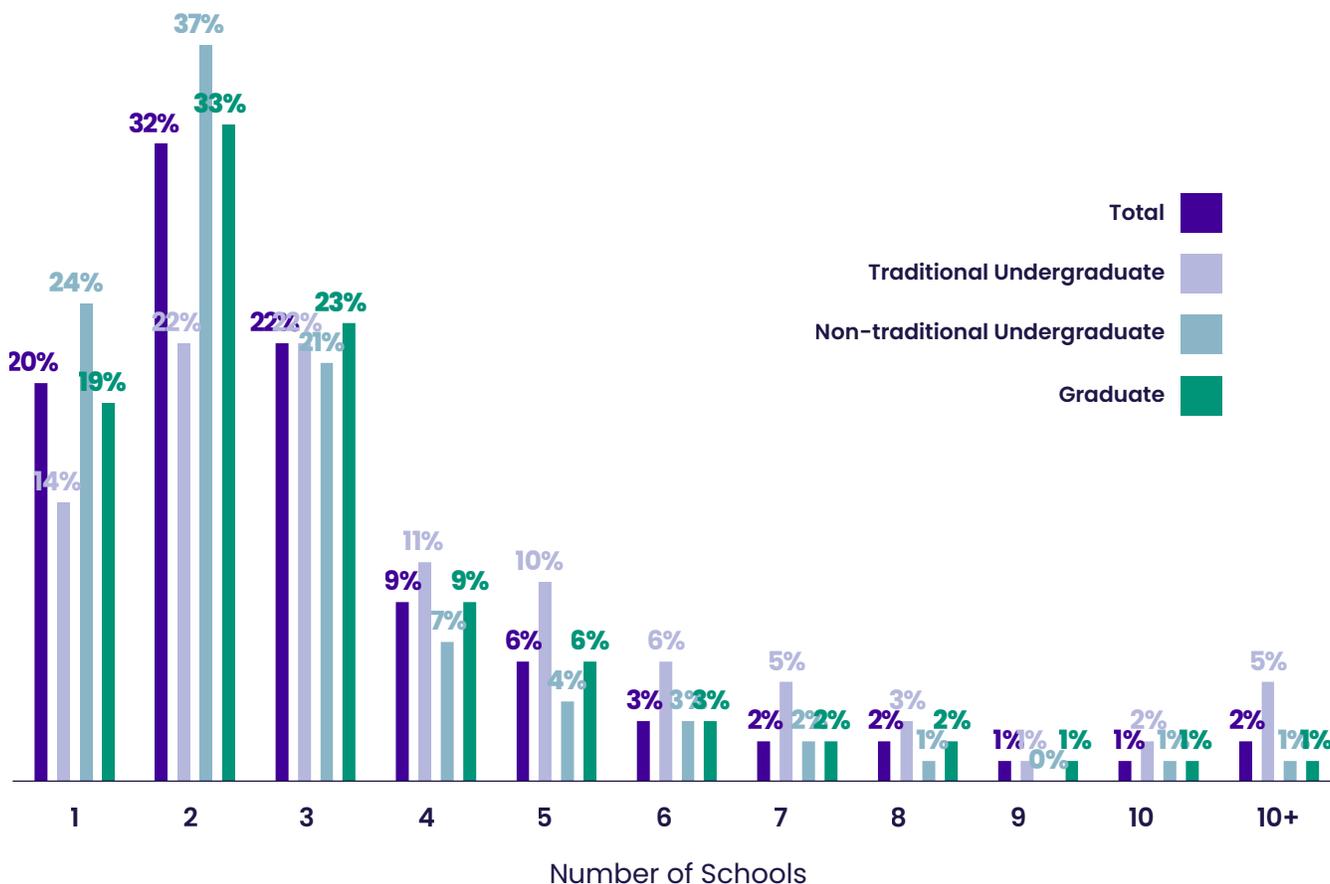
Number of Institutions to Which Learners Initially Considered



Learners begin with broad option sets—often larger than institutions assume.



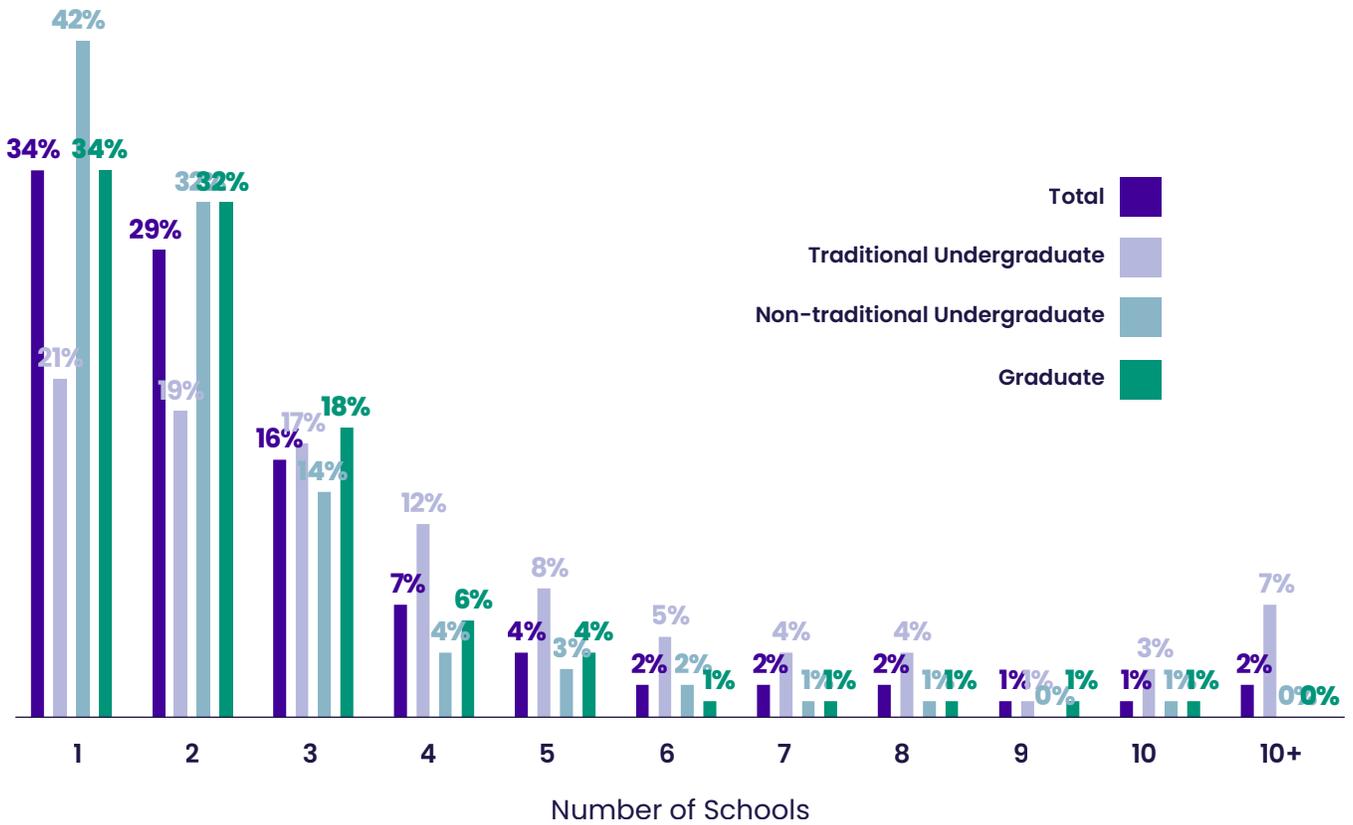
Number of Institutions to Which Learners Contacted



Contact does not represent narrowing certainty. It reflects tactical engagement with a subset of options still under evaluation.

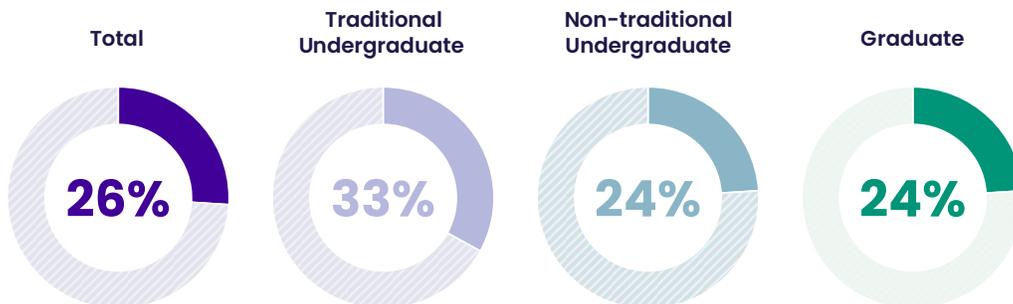


Number of Institutions to Which Learners Applied



Application volume narrows, but confidence does not collapse in parallel.

Learners Who Added Schools After Inquiry or Application



The act of application does not eliminate alternatives. Learners actively re-expand their option set as new constraints, comparisons or signals emerge.

The Legacy Enrollment Funnel Misrepresents Modern Behavior

Viewed through the legacy funnel lens, these behaviors can appear inefficient or fickle. Viewed through a behavioral lens, they are entirely rational. Learners now operate in a decision environment where new information is inexpensive to acquire, alternatives remain continuously visible and re-evaluation carries little penalty. In this context, narrowing occurs in the number of options considered, not in the degree of certainty behind the choice.

That distinction is critical. Institutions continue to measure progress at points where learners are still actively deciding. The resulting metrics fluctuate not because institutional performance has declined, but because decision resolution now occurs later than measurement systems were designed to capture.

Orbit Economics Explained

The modern enrollment journey resembles an orbit more than a pipeline. Learners move closer to and further from institutions over time, with engagement strengthening and weakening as new information enters the system. External forces—such as changes in cost, schedule constraints, AI-mediated comparisons and peer input—continually alter trajectory. Commitment does not stabilize through forward progression alone. It stabilizes only when enough reinforcing signals accumulate to sustain confidence. Therefore, orbit behavior does not indicate indecision. It reflects a decision environment in which continuous validation is rational and expected.

This shift creates significant measurement distortion. Institutions continue to rely on metrics such as inquiry-to-application conversion, application-to-enrollment yield and time-bound progression benchmarks—measures built on the assumption of linear movement and definitive closure. Orbit behavior violates those assumptions. As a result, yield volatility increases without a clear causal explanation, melt persists even when outreach accelerates and performance appears unpredictable. The issue is not effort, it is a misalignment of strategy, behavior and performance metrics.

What Orbit Logic Requires Instead

Under the New Enrollment Model, enrollment strategy must shift from managing stages to maintaining reputation authority and building confidence. Engagement does not end at inquiry, validation does not end at application and reassurance does not end at acceptance. Enrollment success is no longer defined by how efficiently learners are moved forward through a sequence of steps. It is defined by whether learners remain close enough to the institution for confidence to stabilize over time.



Enrollment Now Begins Before Institutions Ever Engage

Enrollment systems were designed around inquiry as the starting line, that line has quietly moved, driven in part by an increasing role played by dual and concurrent enrollment programs.

Today, a majority of learners enter postsecondary decision-making with college credit already earned. More than an acceleration tactic, this structural shift jumpstarts the formation of academic identity, confidence and expectations.

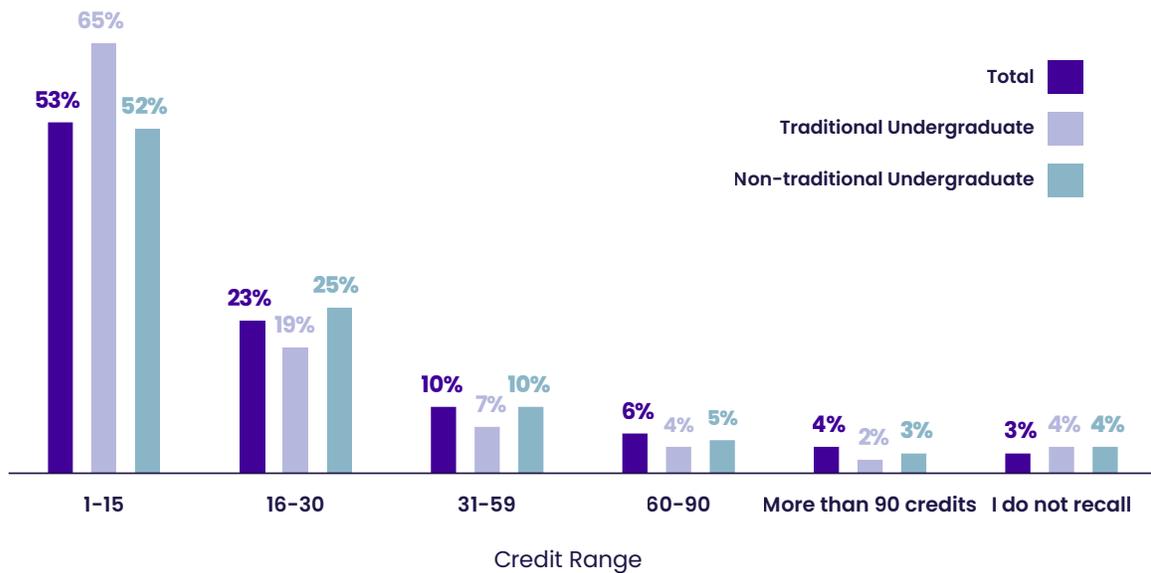


Dual/Concurrent Enrollment Changes the Psychological Starting Point



Early exposure to college-level work is now normative, not exceptional.

Number of College Credits Earned Prior to Enrollment



The distribution matters. Learners entering with meaningful credit accumulation do not consider themselves novices. They perceive themselves as consumers who have the experience necessary to act as savvy decision makers.

Dual/Concurrent Enrollment & Credit-Earning Participation by Learner Segment



Traditional undergraduates, in particular, show high participation—helping explain why younger learners often demonstrate greater willingness to re-evaluate options later in the journey.

What Dual/Concurrent Enrollment Actually Changes

Dual/concurrent enrollment does more than shorten time-to-degree; it fundamentally reshapes how learners approach institutions. Students who arrive with early college credit carry higher academic confidence, exhibit lower tolerance for redundancy and expect clearer, more efficient pathways. These students assume greater agency in their institutional relationships not because expectations have been inflated, but because they have already earned familiarity with higher education.

This dynamic is often misread. When Modern Learners with earned credit reopen their search more readily, reassess offers more aggressively, or exit when friction appears, institutions sometimes interpret this as volatility or indecision. It is neither. This cohort entered higher education earlier, moved through it faster and encountered fewer psychological barriers along the way. Their behavior is not a rejection of higher education—it is a rational response to early success within it.

Dual/Concurrent Enrollment Breaks a Core Legacy Assumption

Legacy enrollment logic assumes that institutions are learners' first point of entry into higher education. Dual/concurrent enrollment fundamentally disrupts that assumption. For many students, initial exposure to college-level work now occurs through high schools, community colleges, state-supported programs or partner providers well before a four-year institution enters the picture. By the time these learners engage with universities, expectations have already been set, academic momentum already exists and tolerance for inefficiency is already low.

This shift explains why credit transfer clarity has become a decisive early filter in enrollment decisions. Learners do not wait to negotiate credit acceptance after inquiry. They pre-screen institutions based on anticipated friction, removing options that appear likely to delay progress or duplicate effort. In many cases, the decision is made before inquiry.

Dual/Concurrent Enrollment as a Confidence Accelerator

The most underappreciated effect of dual/concurrent enrollment is psychological. Students with early success in college-level coursework internalize a simple but powerful belief: *I can navigate this system—and I have options.* That belief reshapes behavior across the entire enrollment journey. It increases learners' willingness to challenge institutional processes, reduces patience with opaque or inefficient policies and heightens readiness to disengage when confidence begins to erode.

Under the New Enrollment Model, dual/concurrent enrollment must be understood not as a feeder pipeline, but as early enrollment occurring outside institutional control. Enrollment now begins before traditional enrollment systems ever engage.

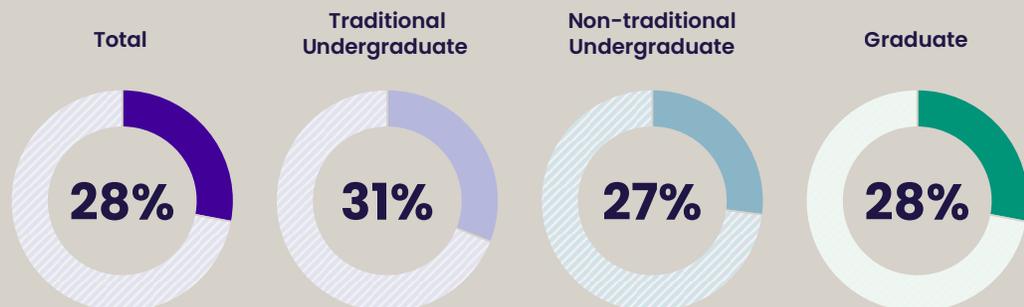


Students Retain Power After Enrollment

Enrollment no longer marks the end of decision-making; it triggers a new phase of evaluation. This shift is the natural consequence of a modern decision environment that allows—and often rewards—continued validation. In the legacy model, enrollment signaled closure: alternatives fell away, decisions resolved and commitment stabilized. In the Modern Enrollment Model, enrollment is viewed by students as a conditional commitment.

Learners enroll while continuing to evaluate affordability, feasibility and career alignment because doing so is rational in a system where information remains readily available, switching costs remain manageable and the consequences of misalignment are significant.

Learners Continue Researching Other Schools After Enrolling

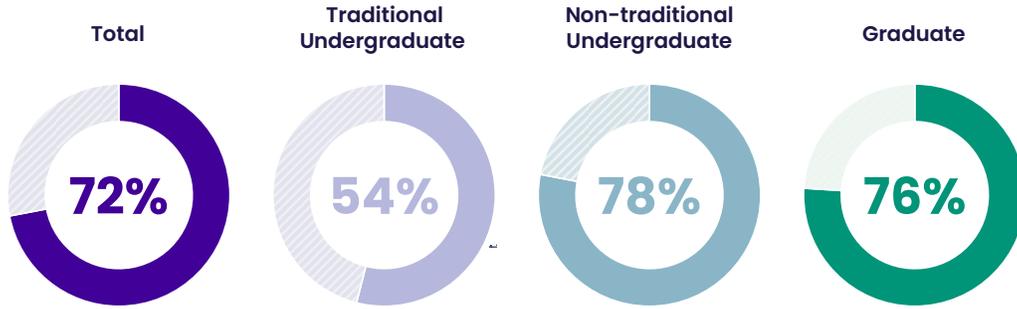


Post-enrollment evaluation is now normative, not exceptional.

The Post-Acceptance Vulnerability Window

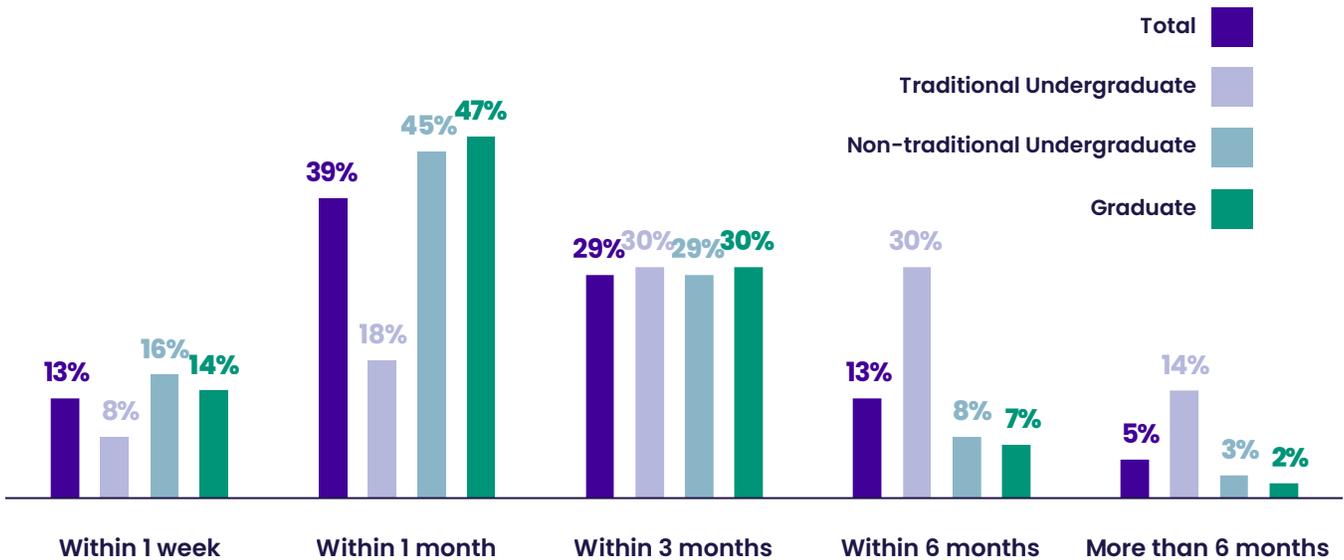
The most fragile phase of enrollment is no longer inquiry or application. It is the period between acceptance and program start. During this window, financial clarity is finalized, life constraints intensify, competing options resurface and confidence can decay if it is not actively reinforced.

Enrollment at First-Admitting Institution



Acceptance order no longer guarantees enrollment loyalty, especially among traditional undergraduate students.

Expected Timing of Classes After Acceptance



Over half of Modern Learners expect classes to start within one month.

Longer gaps increase exposure to doubt, disruption and alternative offers.

Retention Begins Before Day One

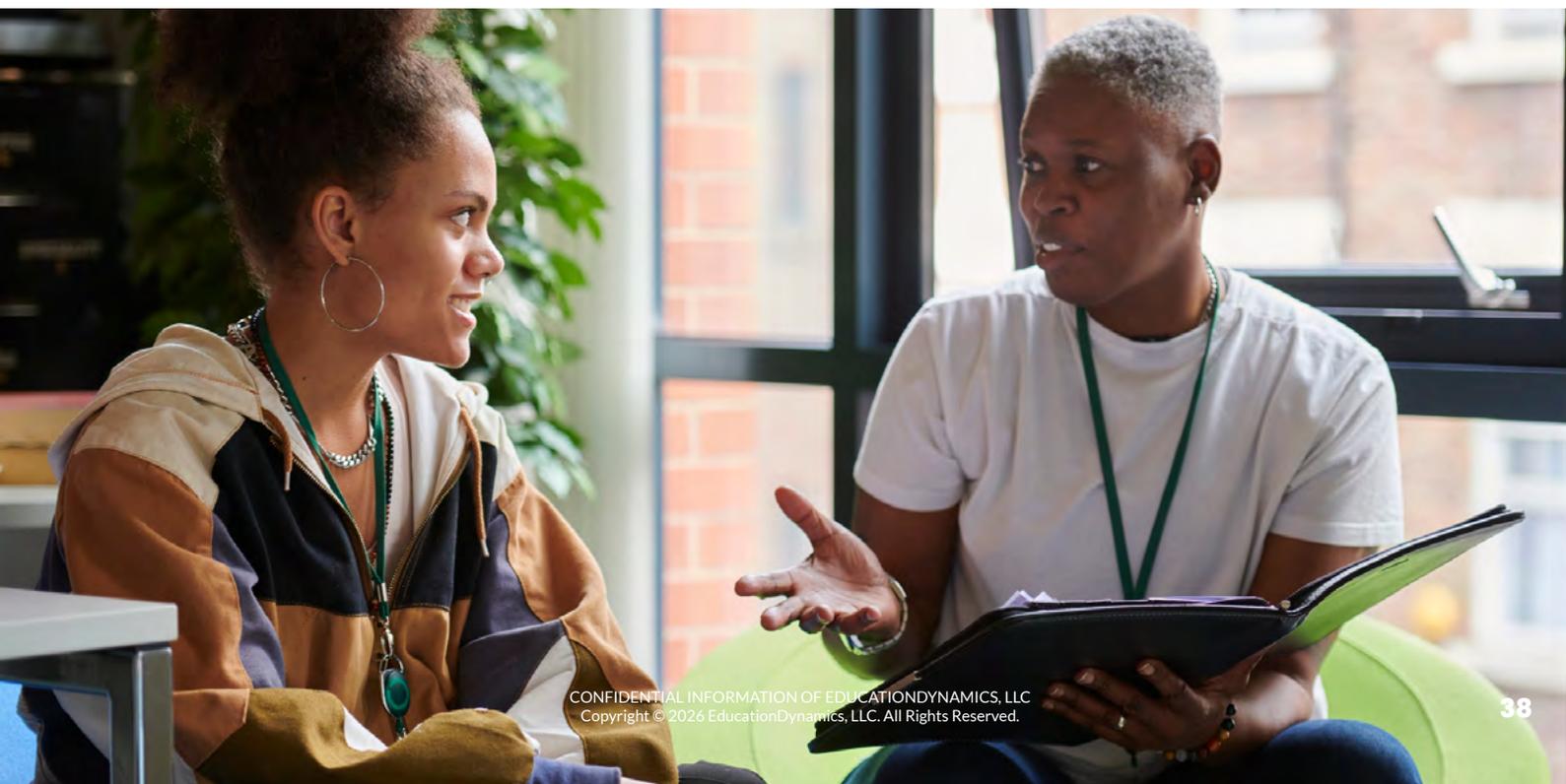
Under the New Enrollment Model, institutions should not wait for classes to start to begin work on retention. Retention is an enrollment outcome to be safeguarded throughout the consideration process. Early attrition is rarely driven by a sudden realization of a poor fit. It arises from unresolved expectations, convenience breakdowns and lingering uncertainty. Institutions that approach retention as a post-enrollment exercise are responding to symptoms rather than fitting strategy to structure. Commitment now stabilizes later than enrollment systems were historically designed to assume.

AI Establishes and Stabilizes Early Confidence

AI's role does not end at discovery. In the Modern Enrollment Model, AI enables early identification of volatility risk, segmentation by confidence stability and customized reinforcement of alignment across the learner lifecycle. Used responsibly, AI allows institutions to support commitment, reduce unnecessary switching and stabilize lifetime value earlier in the journey. This is not about controlling learners; it is about supporting decision stability in a system that no longer guarantees it by default.

Embrace Learners Retaining Power as a Feature, Not a Threat

Learners owning and retaining power over the enrollment process is often viewed as a threat. It is better understood as a feature of a more rational decision environment. Learners retain agency longer because information is abundant, alternatives remain visible and the consequences of misalignment are significant. Under the New Enrollment Model, success is not defined by battling over control, but by designing effective enrollment processes that fit a world in which learners retain agency longer.





Program Demand is Rebalancing as Learners Become More Adept at AI-Proofing their Career

For much of the last decade, enrollment strategy converged around a reasonable assumption: Demand for specific fields of study would continue to expand across all learner segments. At the time, the data seemed to support this theory. Technology programs were an example of an ever-expanding opportunity for both institutions and Modern Learners.

The data now shows that interest in Computers & IT has not collapsed—but it has segmented. Segmentation within fields of study illustrate precisely why the New Enrollment Model matters.



Tech Demand Did Not Decline — It Reorganized

Program Interest by Learner Segment

Field of Study	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
Business	21%	15%	22%	24%
Computers & IT, Technology	19%	8%	19%	28%
Health, Nursing & Medicine	17%	16%	18%	15%
Science, Technology, Engineering or Mathematics	12%	21%	9%	10%
Social Sciences, Criminal Justice, Law	8%	10%	9%	6%
Arts & Humanities	6%	13%	5%	3%
Education & Teaching	6%	6%	6%	5%
Counseling, Human Services	5%	2%	7%	5%
Other:	6%	10%	6%	4%

Computers & IT still ranks high overall (19%) but growth has plateaued following the 2024-2025 surge. Most importantly, demand is no longer uniform across learner types.

This is not volatility, but academic rebalancing. And, this rebalancing is not limited to technology and IT fields.

- / Graduate learners now drive the majority of IT demand (28%), focusing on specialization and advancement
- / Non-traditional learners remain vocational, prioritizing Business (22%), Health (18%) and Counseling (7%)
- / Traditional undergraduates show renewed interest in foundational STEM (21%) and Arts & Humanities (13%)

Structural Shift #1: Vocational and Exploratory Rebalancing Among Traditional Undergraduates

Traditional undergraduates are not rejecting career logic; they are deferring specialization. After years of narrowly framed workforce narratives, younger learners are reasserting a desire for intellectual exploration, transferable foundations and optionality over early lock-in. In this context, renewed interest in foundational STEM and Arts & Humanities reflects risk-managed exploration rather than disengagement from outcomes in an uncertain economy.

Structural Shift #2: Career Alignment Is Segment Specific

The data clarifies that career logic now expresses differently by learner type:

- / Traditional undergraduates seek exploration *with outcomes*
- / Non-traditional learners seek immediate mobility
- / Graduate learners seek advancement and specialization

Why the Legacy Model Misreads This Shift

Funnel-based models flatten segmentation, reducing demand signals to binary interpretations: rising or falling, strong or weak, winning or losing. The New Enrollment Model interprets demand differently—as reconfiguring rather than declining. When institutions misread segmentation as contraction, they risk chasing yesterday’s growth patterns, overbuilding generalized programs and mismatching messaging at the moment of consideration.

Academic Rebalancing Through the Three Cs

The Three Cs explain this shift:

1. Cost

- / Younger learners manage uncertainty by avoiding premature specialization
- / Older learners prioritize ROI immediacy

2. Convenience

- / Exploratory pathways preserve flexibility
- / Vocational programs prioritize efficiency

3. Career

- / Early-stage learners value general career preparedness
- / Later-stage career outcomes prioritize specificity

Building The New Enrollment Model

Higher education does not only need new tactics. It needs a new operating logic. All of the elements outlined in this report—dual/concurrent enrollment, AI-mediated discovery, the Three Cs, orbit behavior, flexibility, early career alignment and post-enrollment power—point to a single conclusion: the enrollment system institutions relied on in the past no longer meets the needs and expectations of Modern Learners.

The legacy enrollment model assumed information scarcity, high comparison and switching costs, institutional control over sequencing and gradual resolution of uncertainty. Under those conditions, a funnel-based enrollment system was effective. Institutions optimized awareness-to-inquiry, inquiry-to-application and application-to-enrollment metrics. The focus was on generating volume at the top, persuasion in the middle and yield at the bottom. Reputation accumulated and shifted slowly, flexibility served as a differentiator, career outcomes were evaluated late in the process and enrollment marked closure.

The New Enrollment Model emerges directly from Modern Learner behavior. It reflects a decision system defined by abundant information, algorithmic mediation, continuous validation and elevated economic risk. Within this system, decisions no longer resolve at fixed stages, learners orbit institutions over time, confidence stabilizes later than enrollment and elimination occurs early and silently. The shift is not theoretical. It is already shaping outcomes across marketing, enrollment and retention and it requires institutions to realign not effort, but logic.

Legacy Model	vs.	New Enrollment Model
Legacy Funnel		Orbital Funnel
Volume-driven		Constraint-led
Late persuasion		Early trust formation
Static reputation		Continuous verification
Enrollment as endpoint		Enrollment as LTV initiation

The shift in governing mechanics.
This is not a philosophical reframing.
It is a **systems replacement**.

The Three Cs as the Governing Architecture

At the center of the New Enrollment Model is a simple, unforgiving structure:

Cost
Convenience
Career

These are not messaging pillars or branding themes. They are operating constraints. Learners do not evaluate them once and move on; they re-run them continuously as new information enters the system. Artificial intelligence evaluates them early, reputation validates them externally and orbit behavior reflects their ongoing reassessment. Flexibility operationalizes convenience, career alignment stabilizes confidence and confidence leads to retention over time.

When these constraints are not met, Modern Learners simply move elsewhere—quietly, rationally and often invisibly.

The New Model Requires Strategy Transformation

The New Enrollment Model requires a transformative strategy that matches how decisions are made now. That realignment requires a shift toward early resolution rather than late persuasion, with cost clarity established before inquiry, flexibility addressed before application and career alignment reinforced before commitment. It also requires a unified enrollment strategy rather than stage optimization—treating marketing, admissions, onboarding and retention as a single system and prioritizing confidence stabilization as a core objective.

In addition, the model demands infrastructure thinking, recognizing artificial intelligence and institutional reputation as environments in which decisions occur rather than channels to be optimized. Finally, it necessitates outcome-based measurement, moving away from volume and yield as primary indicators and toward stability and lifetime value as truer reflections of enrollment success.



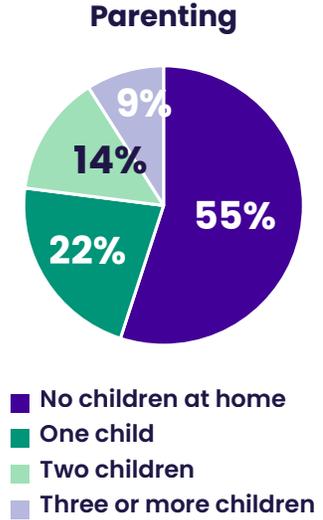
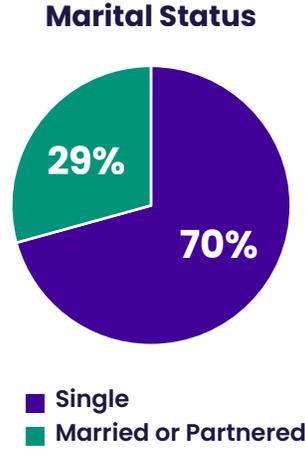
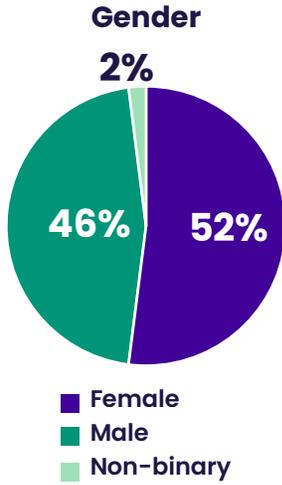
Profile of the Current Modern Learner

The broad spectrum of participants in this study allowed for nuanced examination of how Modern Learners search for programs, evaluate institutions and persist through enrollment. The respondent sample reflects a contemporary higher-education population distributed across multiple life stages, credential pathways and enrollment rhythms. Rather than representing a single student archetype, the sample captures the structural diversity now inherent in modern enrollment systems.

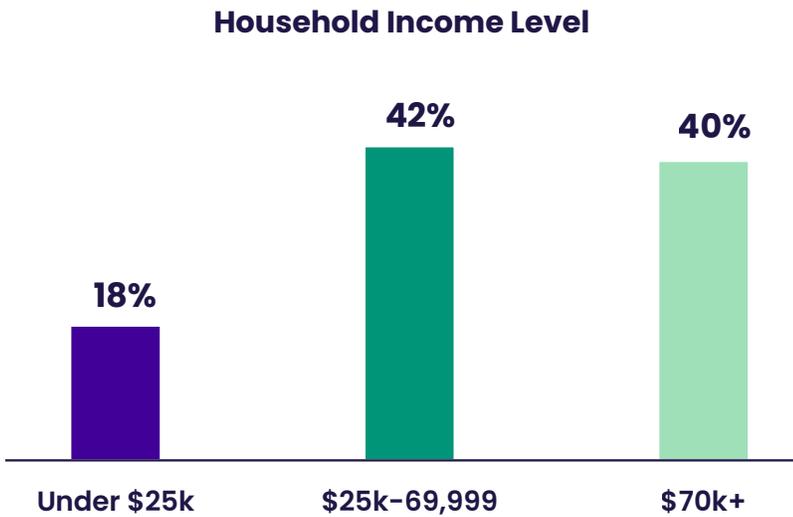


Profile of the Modern Learner Survey Respondents

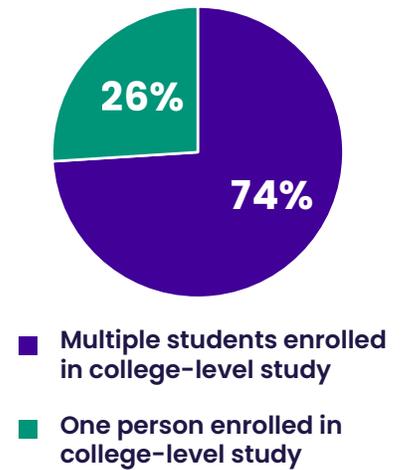
Demographic Overview



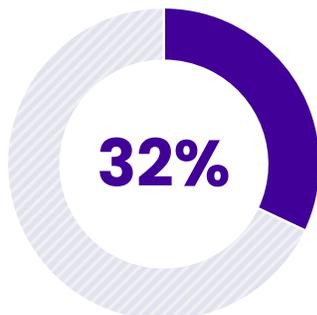
Socioeconomic and Educational Profile



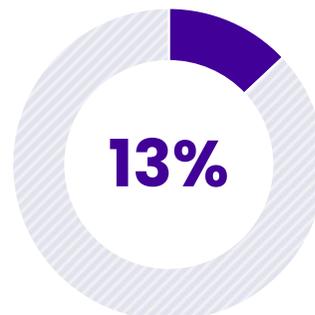
Students in Household



First-Generation College Students

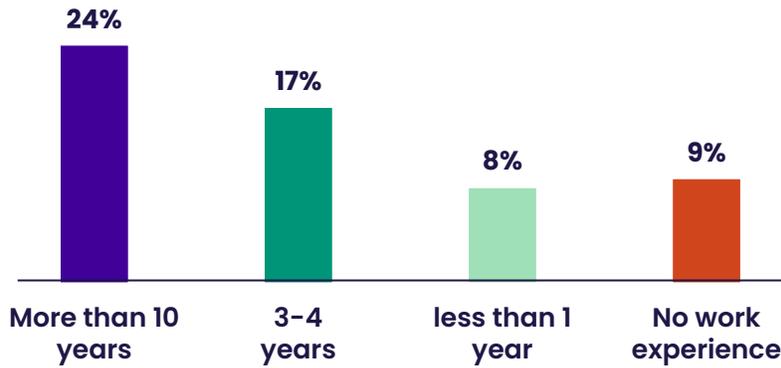


Military Affiliated

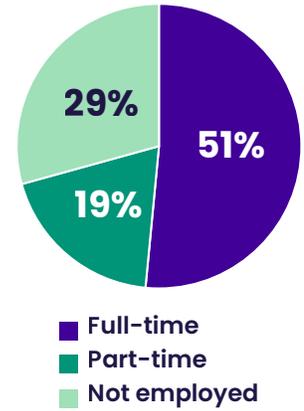


Professional Background

Work Experience

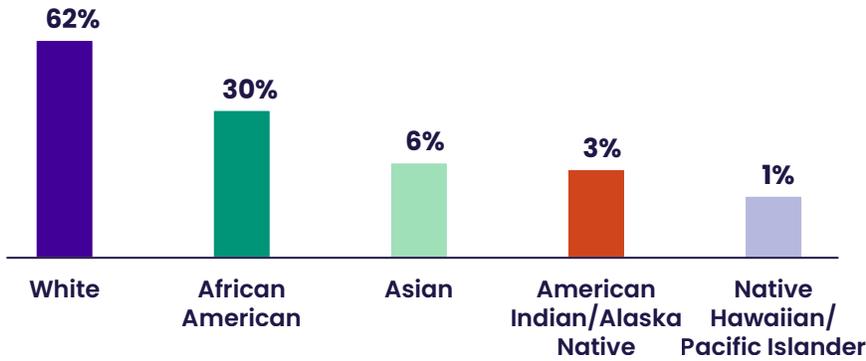


Employment

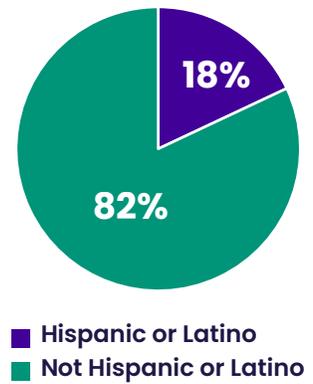


Racial & Ethnic Identity

Racial Identity



Ethnic Identity



Modern Learner Profile Comparison

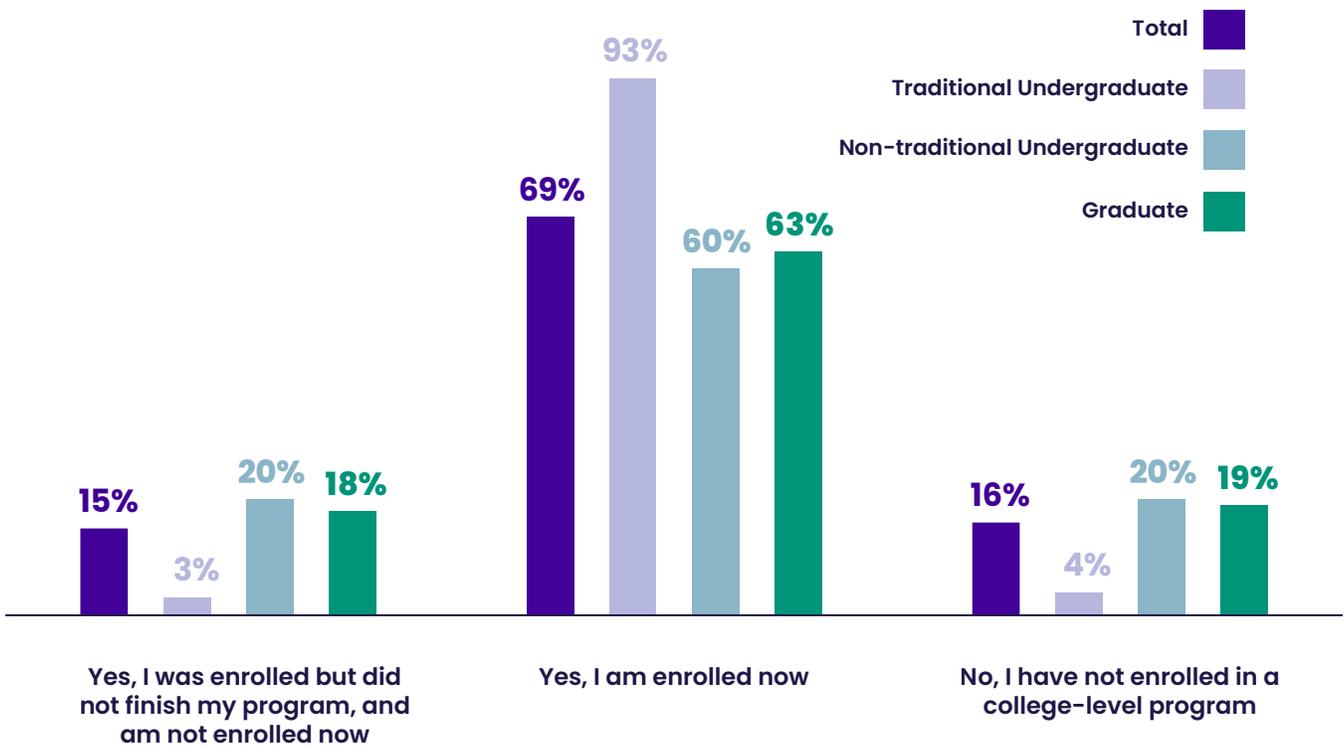
	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
Gender	63% Female 37% Male	54% Female 44% Male	42% Female 58% Male
Marital Status	93% Single 7% Married/Partnered	67% Single 33% Married/Partnered	58% Single 42% Married/Partnered
Children at Home	17%	49%	57%
Household Income	Skews low (46% < \$40K)	Mid-range (\$25K-\$70K)	High (\$70K+)
Work Experience	Low (70% have 0-2 years)	High (33% have 10+ years)	High (28% have 10+ years)
Employment Status	59% Not employed	57% Full-time	74% Full-time
Job/Study Alignment	18% Directly related	24% Directly related	41% Directly related
Tuition Benefits	11% Have access	19% Have access	36% Have access
Employer Support	81% Feel supported	71% Feel supported	82% Feel supported

Educational Stage and Enrollment Status

Most respondents were actively enrolled at the time of the survey, ensuring that the findings throughout this report primarily reflect learners currently navigating institutional environments rather than those recalling their experience. A smaller share had previously enrolled but paused or discontinued study, while another segment had not yet begun college-level education but planned to enroll in the coming year.

Traditional undergraduates displayed continuous enrollment patterns, moving directly from secondary education into postsecondary study. Non-traditional undergraduate and graduate learners more frequently exhibited prolonged interruption in enrollment, reflecting the stop-start educational trajectories that increasingly characterize adult participation in higher education.

Educational Stage and Enrollment Status

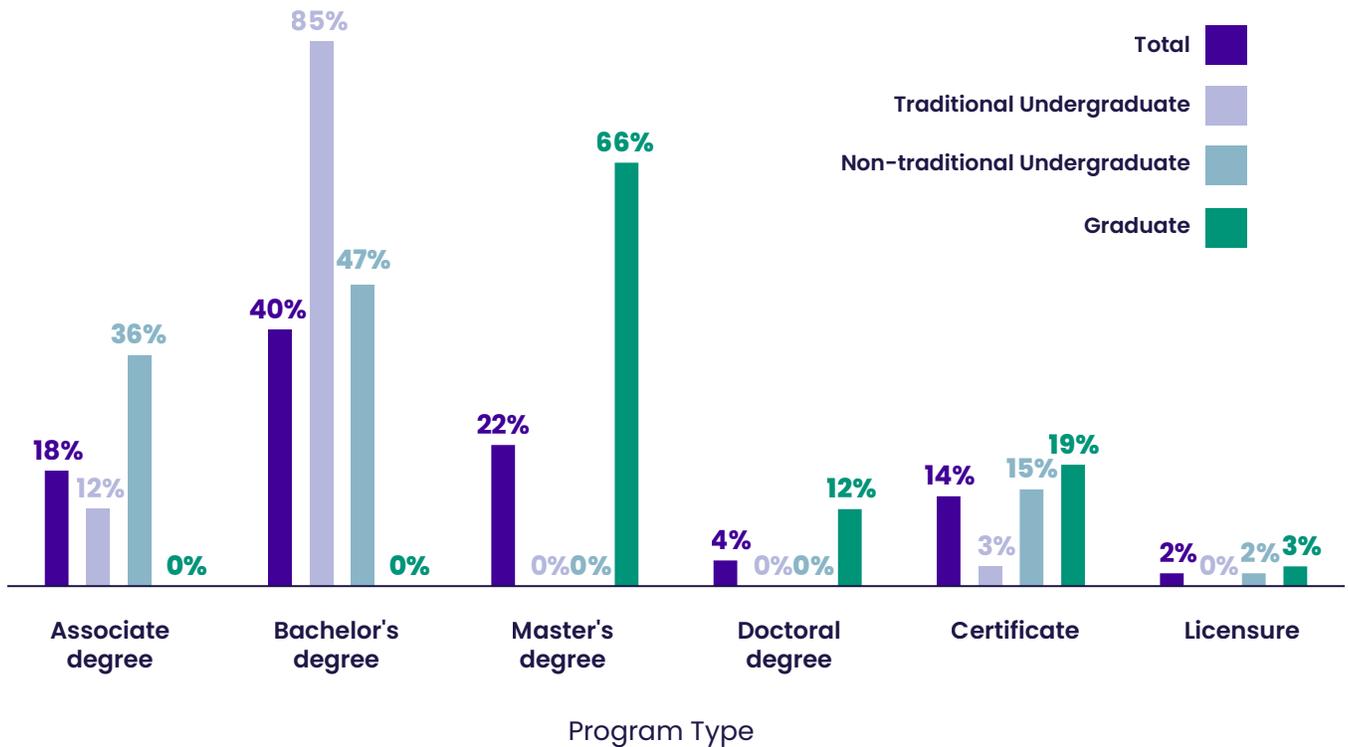


Program Level Distribution

Program participation patterns illustrate how Modern Learners navigate credential pathways. Traditional undergraduates remain concentrated in bachelor’s degree programs. Non-traditional undergraduates distribute more broadly across associate, bachelor’s and certificate pathways. Graduate learners cluster primarily in master’s and doctoral programs, with certificates and licensure programs serving as secondary routes for advancement.

These distributions establish the structural context for findings on modality selection, credential stacking and decision drivers examined in this report.

Program Level Distribution

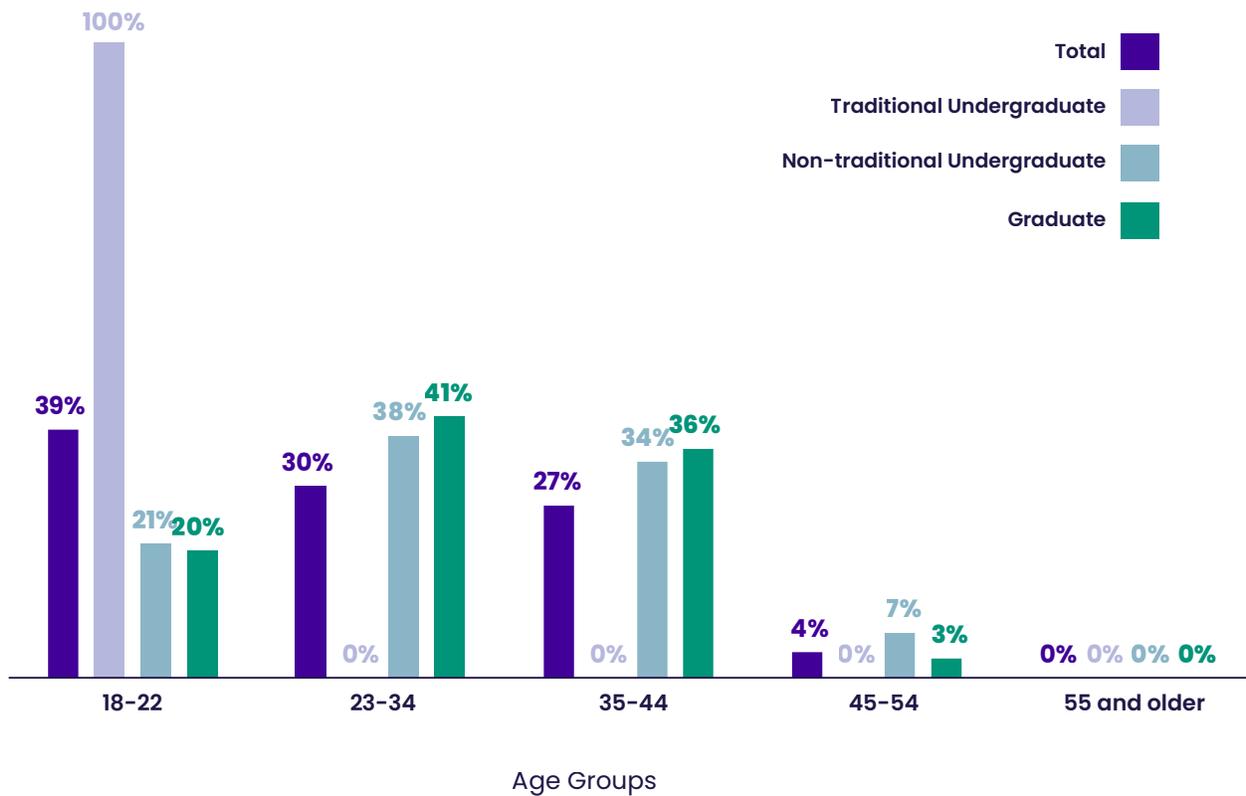


Age and Life Stage Structure

Age distributions align with expected definitions of each learner segment while revealing the broader multi-generational composition of today's student population. Traditional undergraduates occupy the conventional 18–22 range. Non-traditional undergraduate and graduate learners span early adulthood through mid-career life stages.

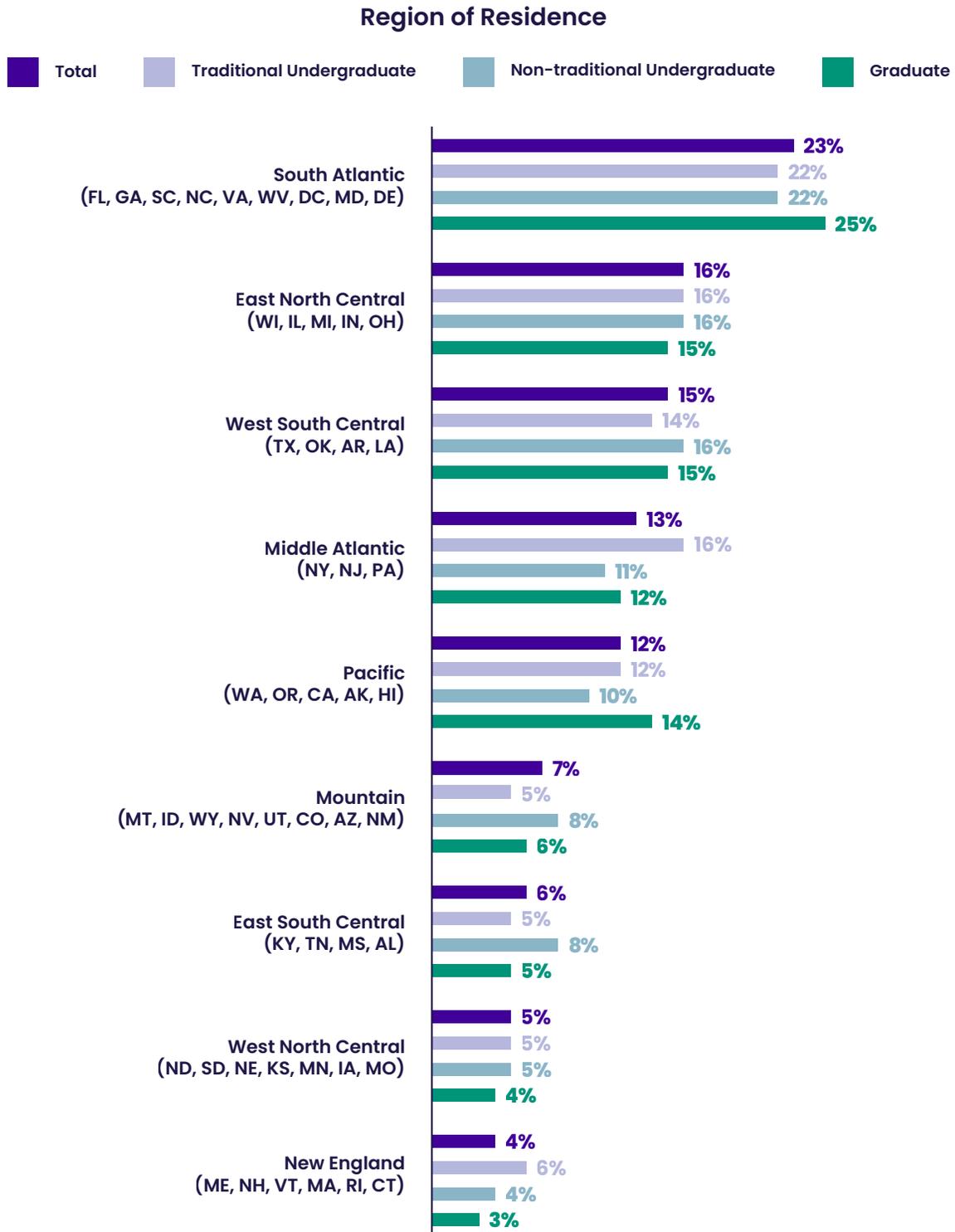
This coexistence of younger exploratory learners alongside older career-anchored learners represents a defining shift in contemporary enrollment environments. Institutions are serving multiple learner life cycles simultaneously, often through systems originally designed for only one.

Age and Life Stage Structure



Geographic Dispersion

Respondents represent a geographically distributed national population, with participation across all U.S. Census regions and no single state dominating the sample. Larger population states contribute expected shares, but representation remains broad, reflecting the increasingly borderless recruitment footprint of contemporary institutions, particularly in online and hybrid markets.

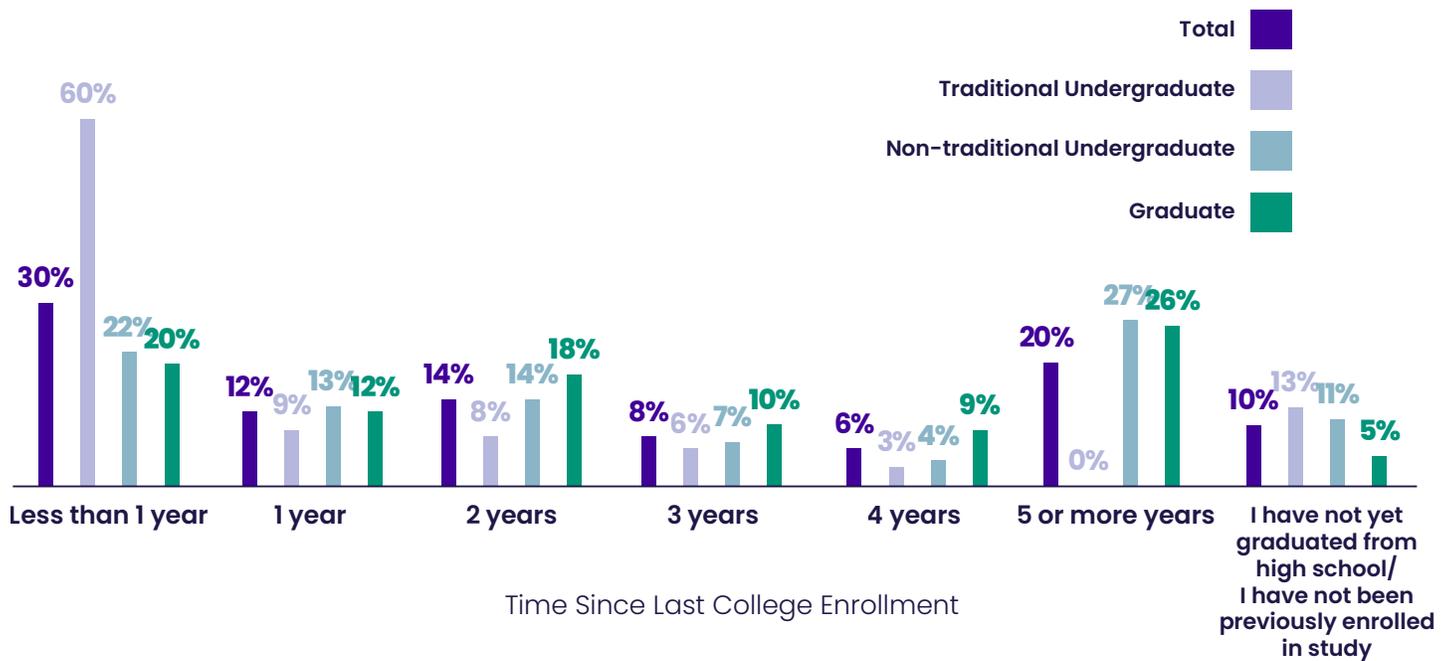


Educational Continuity and Time Away from Study

Time since last enrollment differs meaningfully across learner groups. Traditional undergraduates tend to transition directly from high school into continuous study. Non-traditional undergraduates and graduate learners more often experience extended gaps between enrollment periods.

These enrollment rhythms provide essential context for the findings on program pacing, re-entry motivations and persistence risk explored elsewhere in this report.

Educational Continuity and Time Away from Study



Baseline Educational Attainment

Nearly all respondents reported having completed high school, The inclusion of both traditional and non-traditional undergraduates without a high school degree reflects the inclusion of near-term enrollees transitioning from secondary to postsecondary education.

High School Graduation Status



Taken together, this sample represents a structurally diverse Modern Learner population, spanning age, life stage, credential level and enrollment continuity. These characteristics form the foundation for understanding the behavioral patterns examined in this report: how Modern Learners explore programs, evaluate institutions, choose modalities and persist through enrollment in an increasingly complex higher-education environment.



Reaching Today's Modern Learner

Social Media Platforms Used

Modern Learners reported broad engagement across social media platforms, with Instagram (78%), Facebook (72%) and TikTok (70%) serving as the dominant channels. Platform use reflected sharp generational and professional distinctions.

Traditional undergraduates showed the strongest presence on visually oriented and peer-centered platforms—Instagram (87%), Snapchat (57%) and Pinterest (56%)—a pattern consistent with younger users' digital habits.

Non-traditional undergraduates demonstrated more balanced but still high usage of Facebook (79%) and Instagram (71%).

Graduate students were the most active on Facebook (82%) and LinkedIn (41%), suggesting a greater emphasis on professional or informational networking. Graduate students also reported the highest engagement with X/Twitter (52%) and YouTube Shorts (50%), indicating broader consumption of news-oriented and short-form video content.

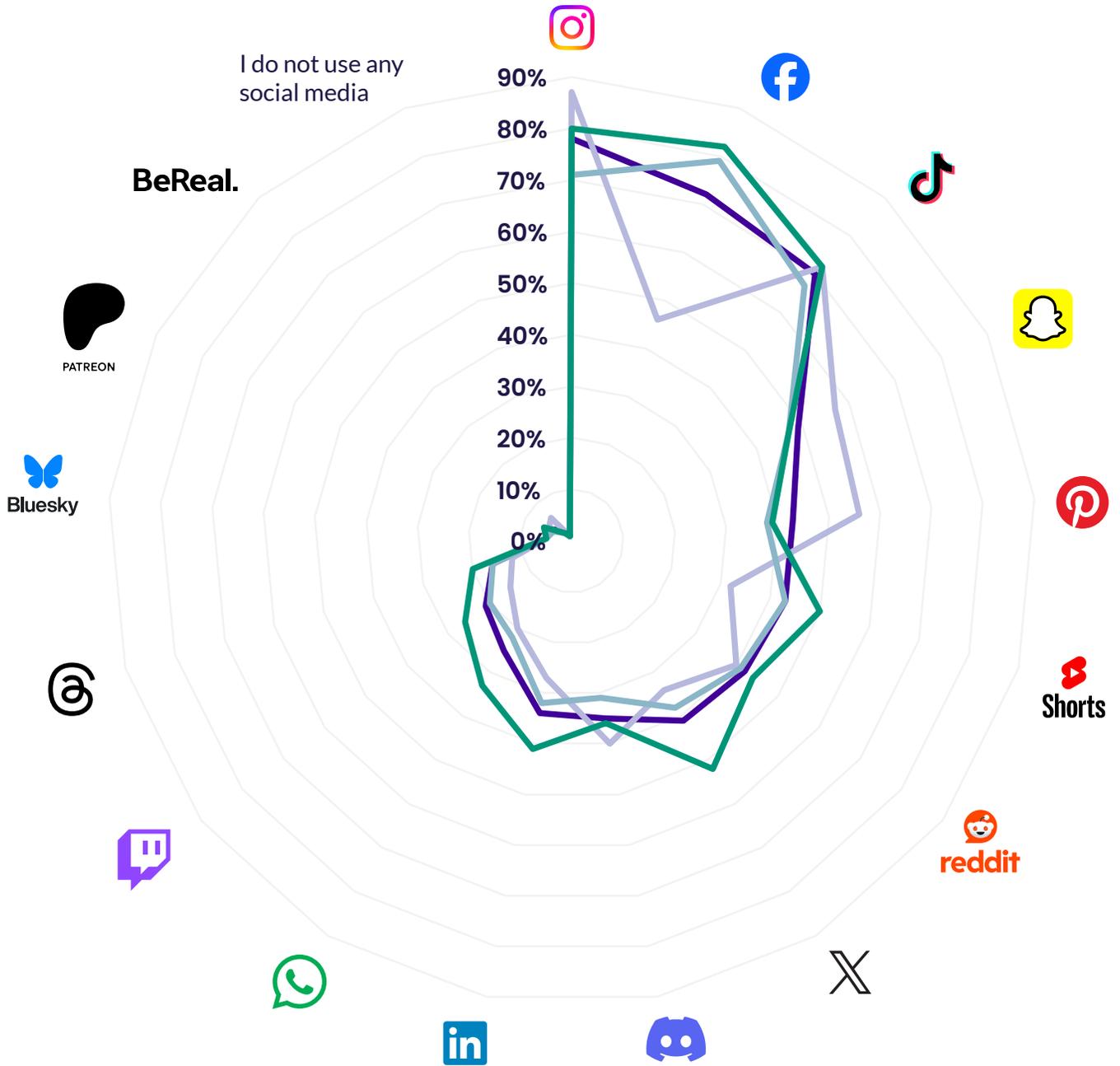
Although overall adoption of niche or emerging platforms remained modest, notable differences appeared at the margins. Graduate students were more likely than other groups to use WhatsApp (33%), Twitch (26%) and Threads (20%), reflecting diverse communication and content-consumption preferences. Traditional undergraduates, by contrast, exhibited the highest use of BeReal (6%) and Discord (40%), platforms associated with more synchronous or community-based interaction.

Despite these variations, nearly all Modern Learners engaged regularly with at least one major platform, with only 1% indicating no social media use at all.



Social Media Platforms Used

■ Total
 ■ Traditional Undergraduate
 ■ Non-traditional Undergraduate
 ■ Graduate

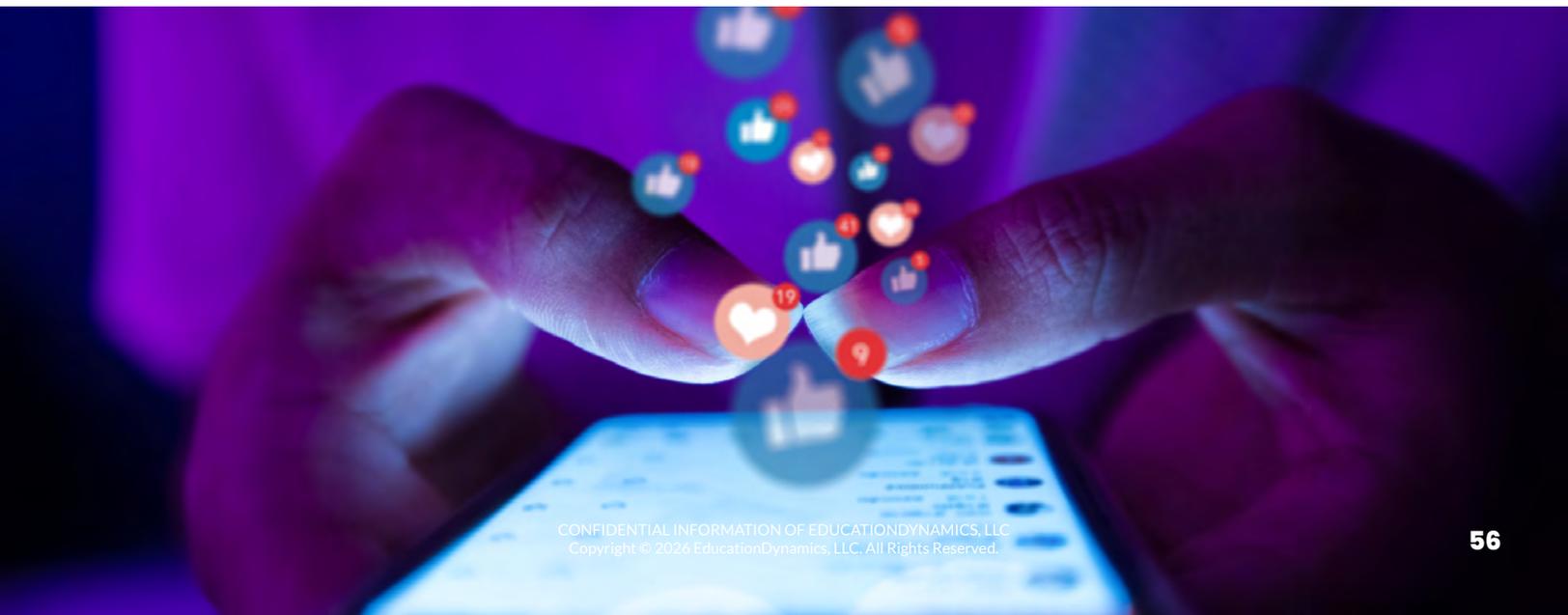


Who Modern Learners Follow on Social Media

Across platforms, Modern Learners primarily followed personal connections such as friends, family and coworkers (85%), underscoring the social and relational foundations of their online environments. Celebrities (52%) and influencers (50%) also commanded significant attention, particularly among Traditional undergraduates, who followed these groups at the highest rates (59% and 55%, respectively). Professional or interest-based networks were similarly important, with 45 percent of Modern Learners following individuals who share similar interests—an affinity strongest among Graduate students (48%).

Who Modern Learners Follow on Social Media

Social Media Follows	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
Friends/family/coworkers	85%	87%	85%	85%
Celebrities	52%	59%	49%	51%
Influencers	50%	55%	47%	51%
People with similar interests	45%	47%	43%	48%
Schools you are/were interested in enrolling	44%	50%	38%	49%
Local businesses	39%	34%	40%	42%
National businesses	30%	25%	28%	35%
Journalists	18%	13%	17%	23%
Schools you were not interested in enrolling	13%	8%	12%	18%
Someone else	1%	1%	1%	0%



Social Media Use

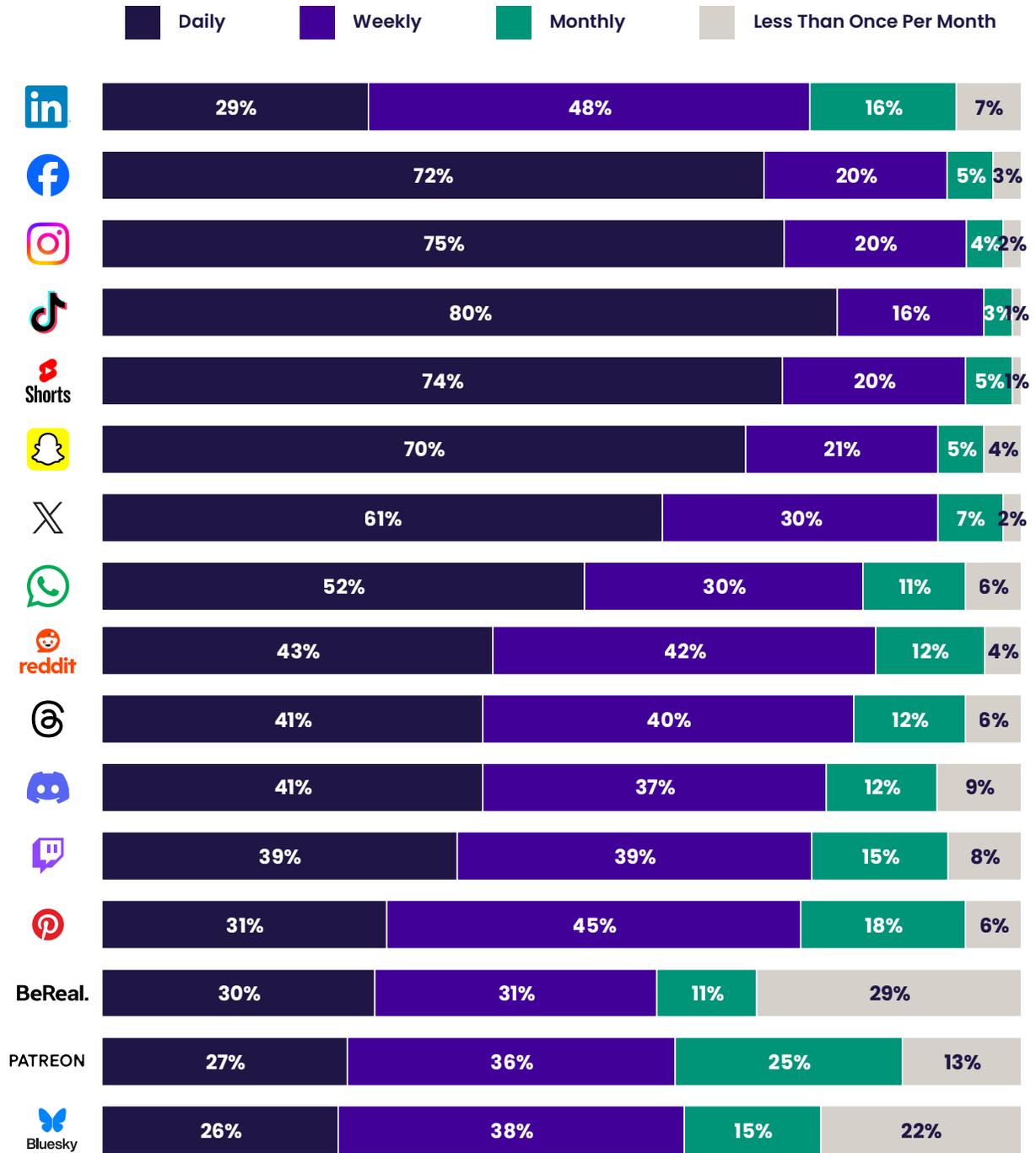
Modern Learners are almost universally active on social media, with 99% reporting use of at least one platform, underscoring the central role these networks play in their daily information ecosystems. Across platforms, usage skews heavily toward daily engagement, particularly on visually driven and video-centric networks. TikTok (80% daily), Instagram (75%), YouTube Shorts (74%), Facebook (72%) and Snapchat (70%) show the highest levels of everyday activity. These patterns suggest that Modern Learners maintain a near-constant connection to social content streams, making these platforms important environments for institutional branding, outreach and enrollment marketing.

Differences between student populations reveal meaningful nuances in how different types of Modern Learners engage with social spaces. Traditional undergraduates are the most intensive daily users of TikTok (86%), Snapchat (78%) and Instagram (82%), reflecting their preference for fast, visually oriented, peer-dominated content. Non-traditional undergraduates also demonstrate strong daily use, though distributed more evenly across platforms, with notable engagement on Facebook (78%) and Reddit (44%). In contrast, Graduate students show a more diversified pattern of daily use that includes professionally oriented platforms such as LinkedIn (35%), suggesting they integrate social media into both personal and career-focused information seeking.

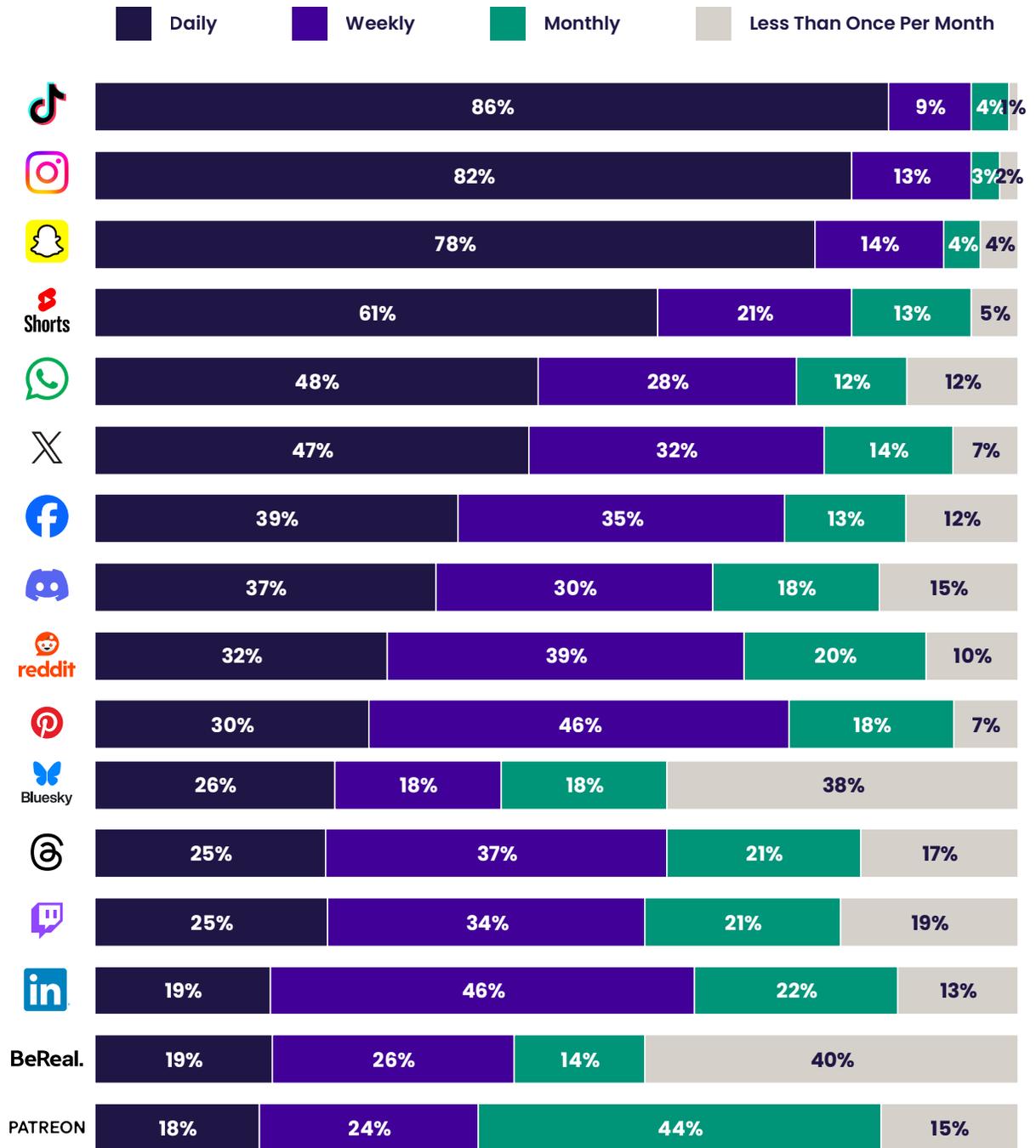
Overall, the data illustrates that social media, particularly video-forward platforms, is a pervasive and habitual part of Modern Learners' routines.



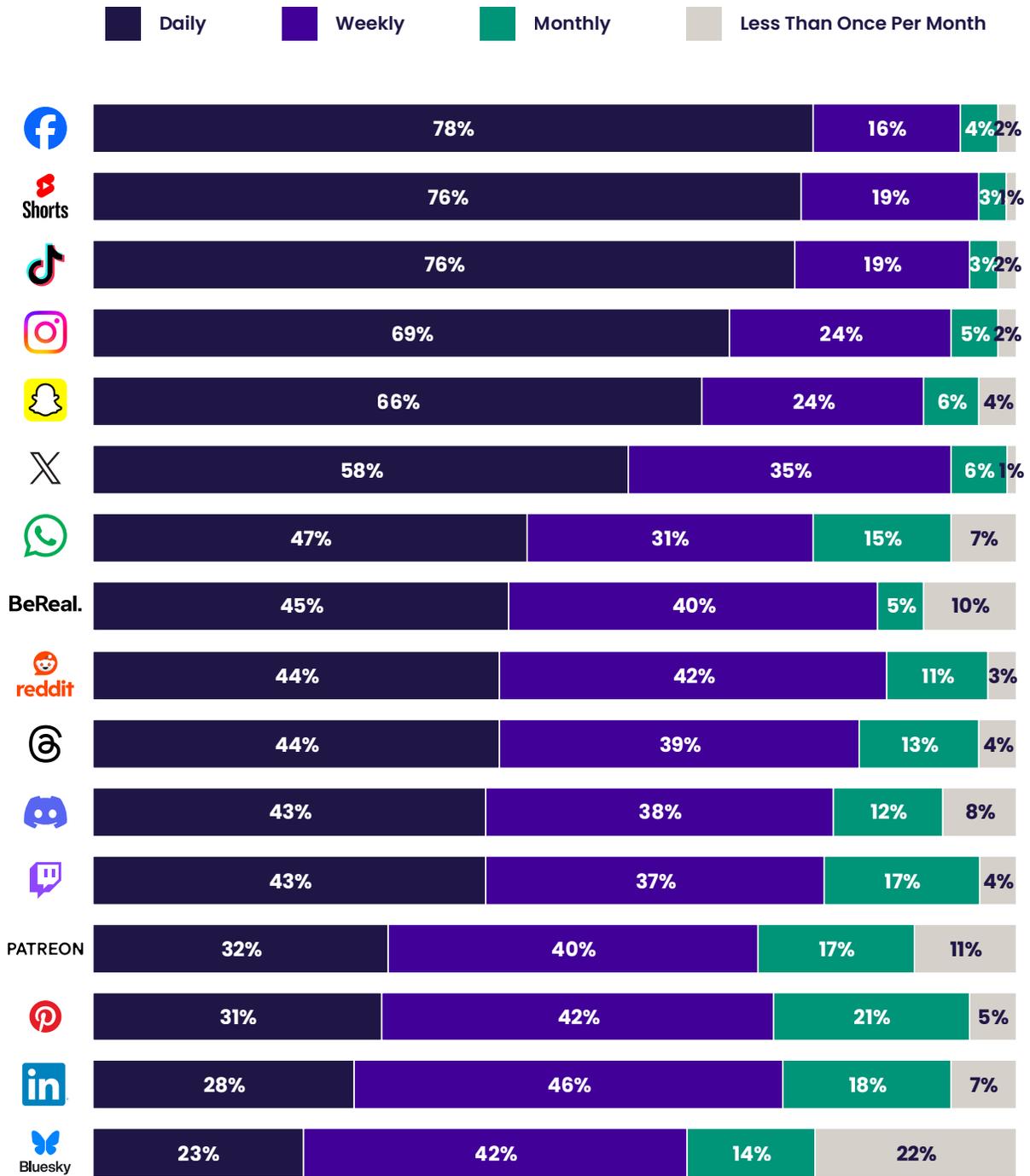
Social Media Use - Total Population



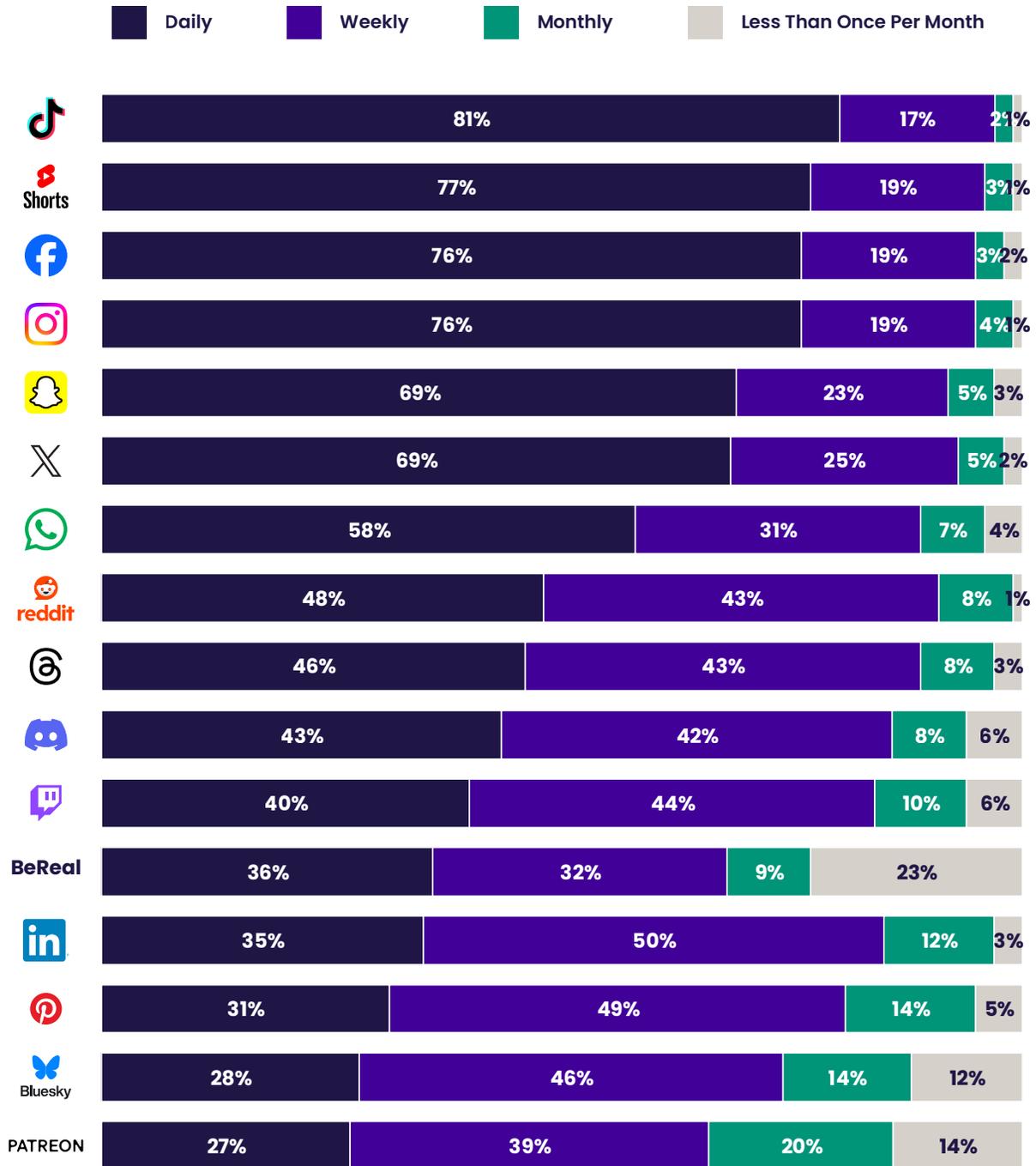
Social Media Use - Traditional Undergraduates



Social Media Use - Non-traditional Undergraduates



Social Media Use – Graduate Students



Social Media Behaviors Among Modern Learners

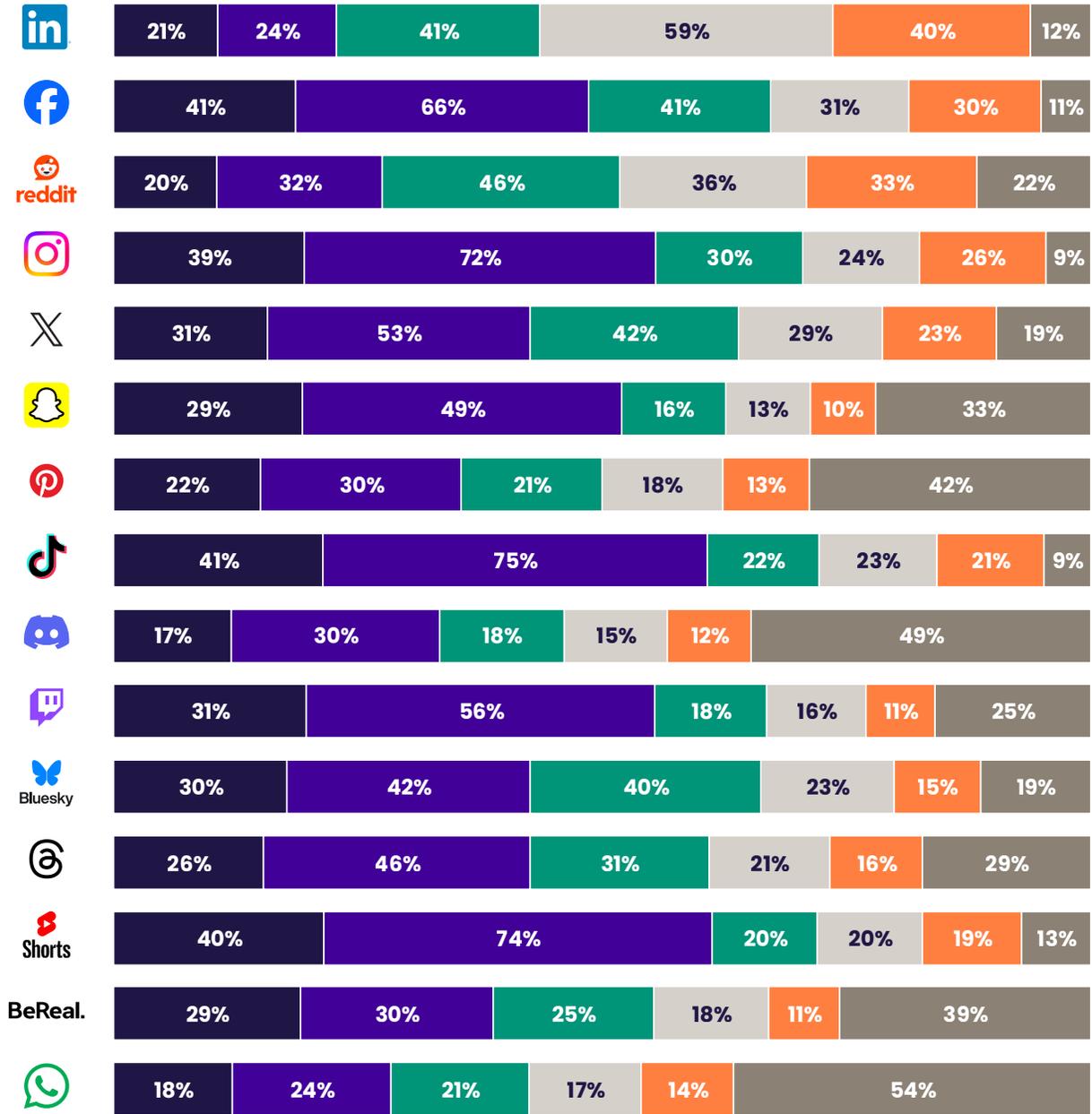
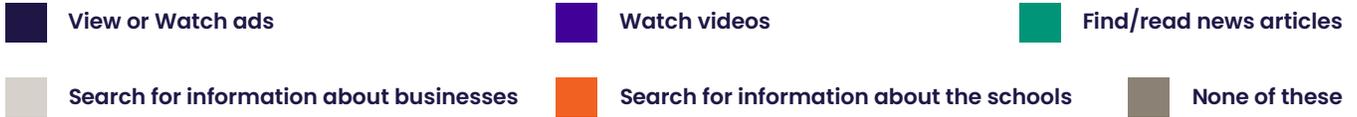
Across platforms, Modern Learners primarily use social media for video consumption, information seeking, news discovery and targeted searches about businesses and schools. Watching videos is the most common activity on nearly every platform. This reinforces the central role of short-form and streaming video in shaping how Modern Learners encounter both general content and school-related information.

Information-seeking behaviors are also widespread, though the nature of what learners search for varies by platform. LinkedIn stands out as the most utilitarian channel: Modern Learners frequently use it to search for information about businesses (59%), news (41%) and schools (40%). Reddit is another major information hub, with high rates of news consumption (46%) and school searches (33%), especially among Graduate students, who consistently engage at elevated levels across platforms. Facebook and Instagram serve as hybrid spaces—part entertainment, part information—with significant use for watching videos and moderate use for reading news and searching for schools.

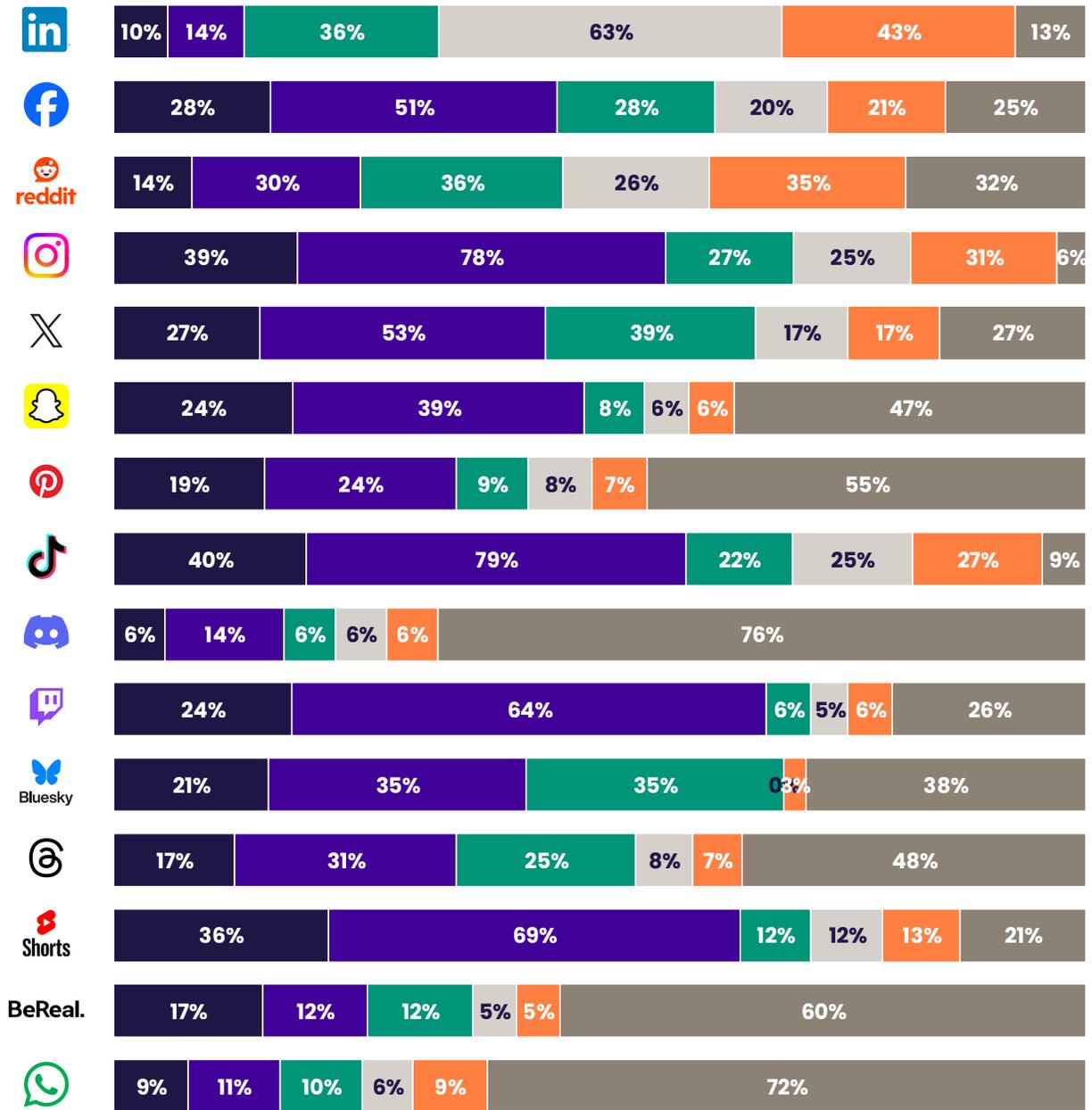
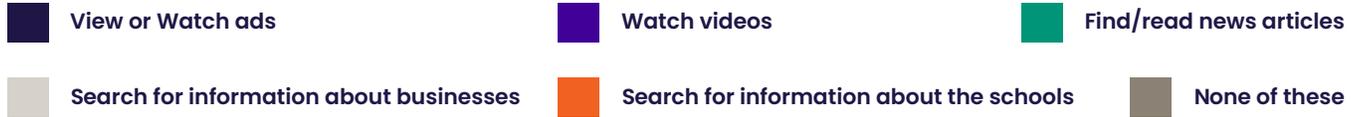
Subgroup differences reveal distinct digital patterns. Graduate students are consistently the most active information-seekers, showing heightened engagement with news, school research and business-related searches across nearly every platform, including LinkedIn, Reddit, X and YouTube Shorts. Non-traditional undergraduates also demonstrate strong information-oriented behavior, whereas traditional undergraduates are far more entertainment-focused: they watch videos at high rates but are less likely to read news, search for businesses, or use platforms for school research. Traditional undergraduates also have the highest rates of selecting “none of these,” particularly on platforms like Snapchat, Discord, Pinterest, Threads and WhatsApp, indicating more passive or socially oriented use.

Overall, the data suggest that Modern Learners use social media not only for entertainment but also—especially among older learners—as a significant informational ecosystem. Social platforms function as parallel search tools where learners supplement traditional research with user-generated insights, news and institutional content. The consistent use of social media to search for school-related information across nearly every platform indicates that institutions benefit when they maintain an active, informative presence aligned with the discovery habits of multiple learner segments.

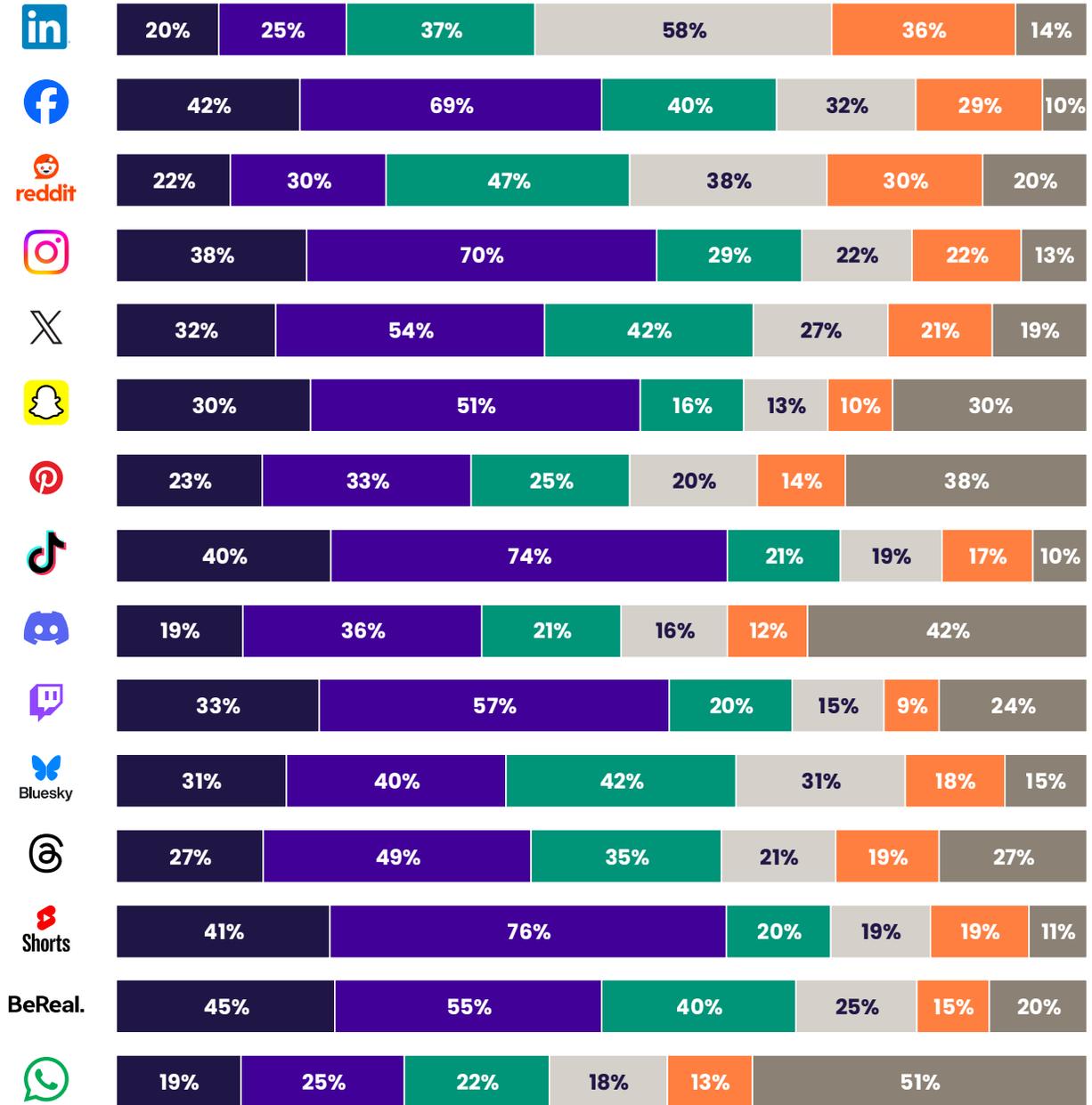
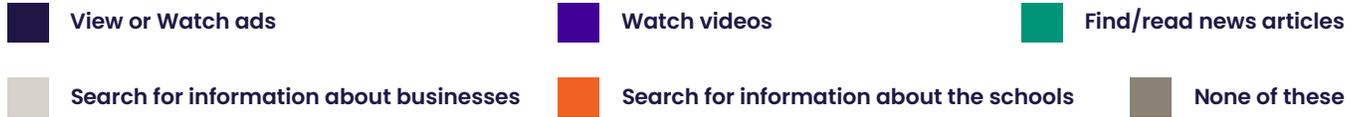
Social Media Activities - Total Population



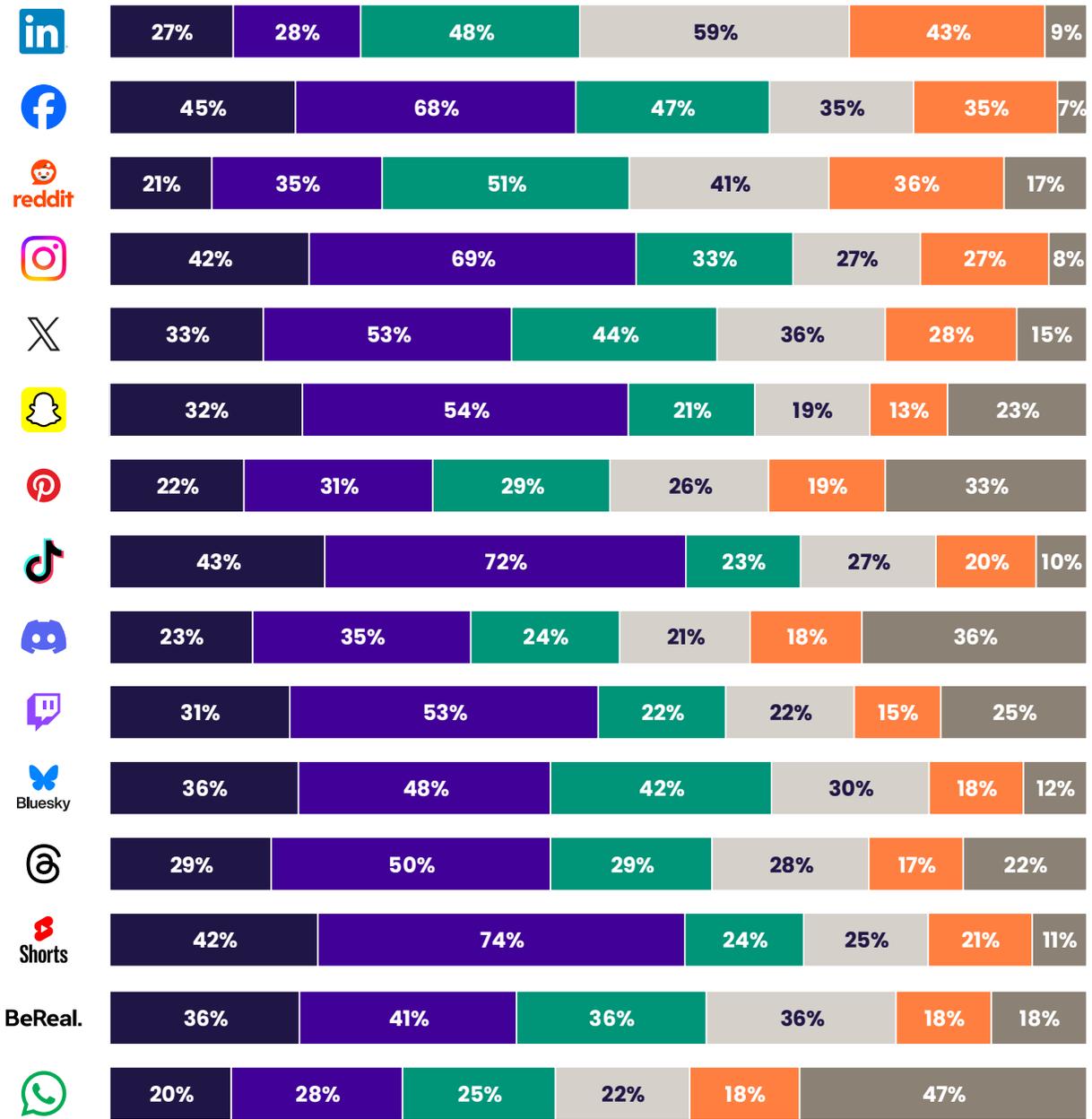
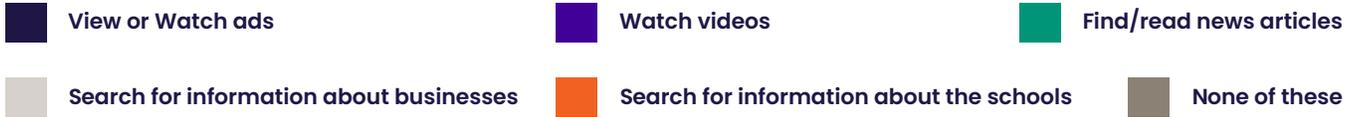
Social Media Activities – Traditional Undergraduates



Social Media Activities - Non-Traditional Undergraduates



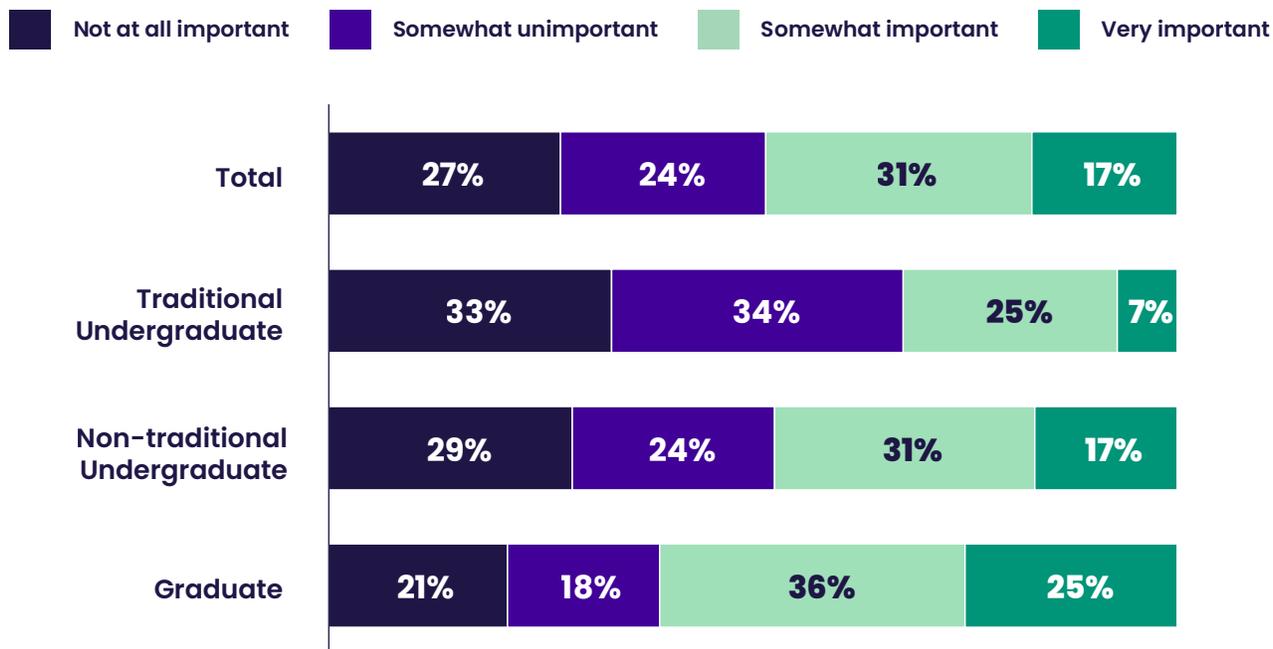
Social Media Activities - Graduates



Importance of Social Media Videos in School Selection

Social media videos played a mixed but meaningful role in Modern Learners' school selection processes. While over half of Modern Learners viewed video content as either somewhat important (31%) or very important (17%), a sizable minority expressed limited reliance on this medium, with 27% indicating it was not at all important. These patterns suggest that video functions as a supplemental rather than foundational information source for most prospective students.

Importance of Social Media Videos in School Selection



Helpfulness of Social Media Advertisements in Enrollment Decision-Making

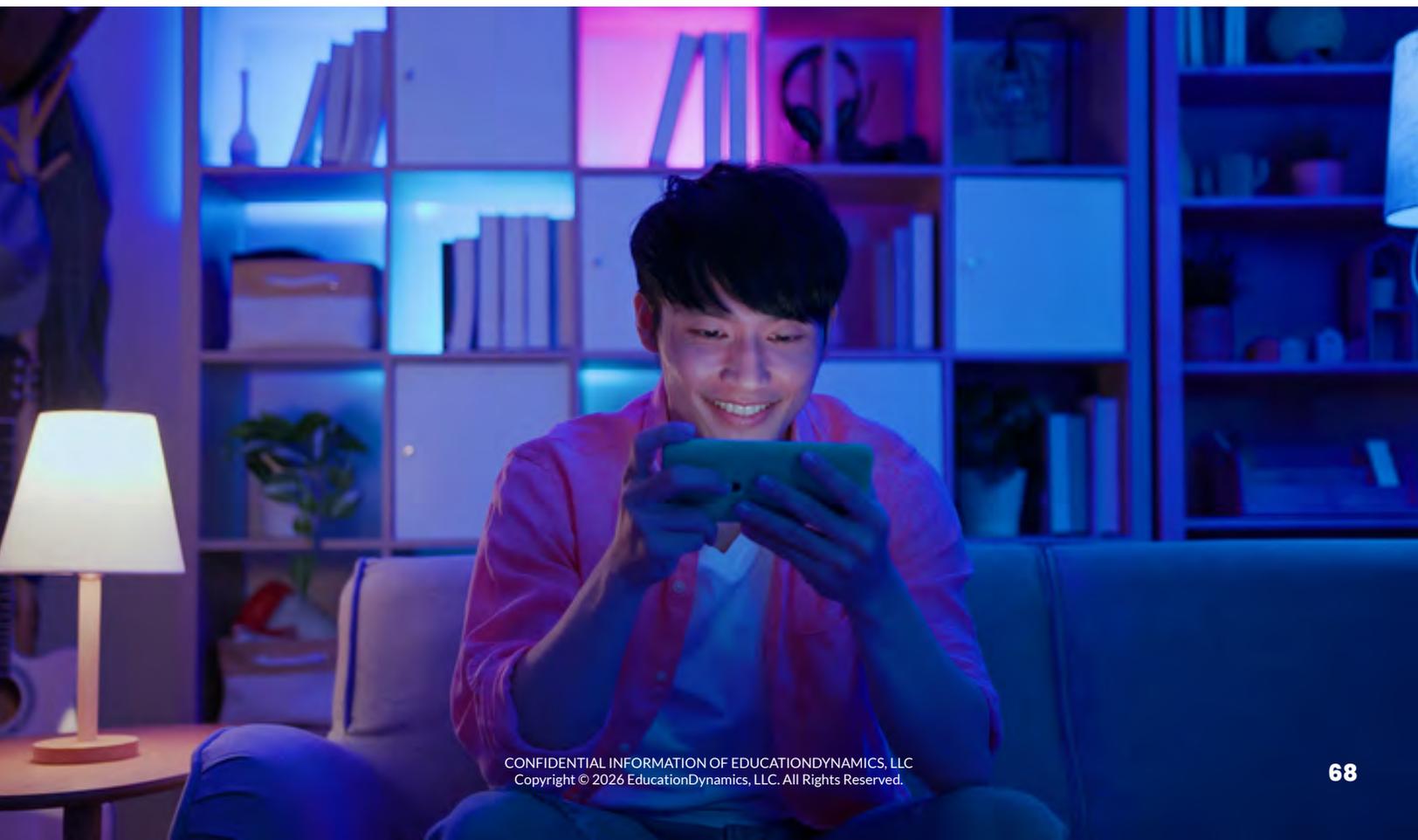
Although Modern Learners regularly encounter advertisements on social media—especially on platforms where video consumption is high—the helpfulness of these ads in influencing inquiry or application decisions varies substantially by platform and learner segment. Earlier data show that a majority of Modern Learners watch videos across nearly all platforms (e.g., 75% on TikTok, 74% on YouTube Shorts, 72% on Instagram, 66% on Facebook) and between 20 and 40 percent routinely view or watch ads on those same networks. This frequent exposure underscores the importance of ads being not only visible but also useful or memorable if they are to influence college-search behaviors.

Across platforms, graduate students consistently found social media ads the most helpful, reporting the highest rates of “very helpful” responses on LinkedIn (50%), Facebook (46%), Instagram (42%), X (38%) and TikTok (35%). Their higher levels of information-seeking behavior across platforms likely contribute to their receptiveness to ads

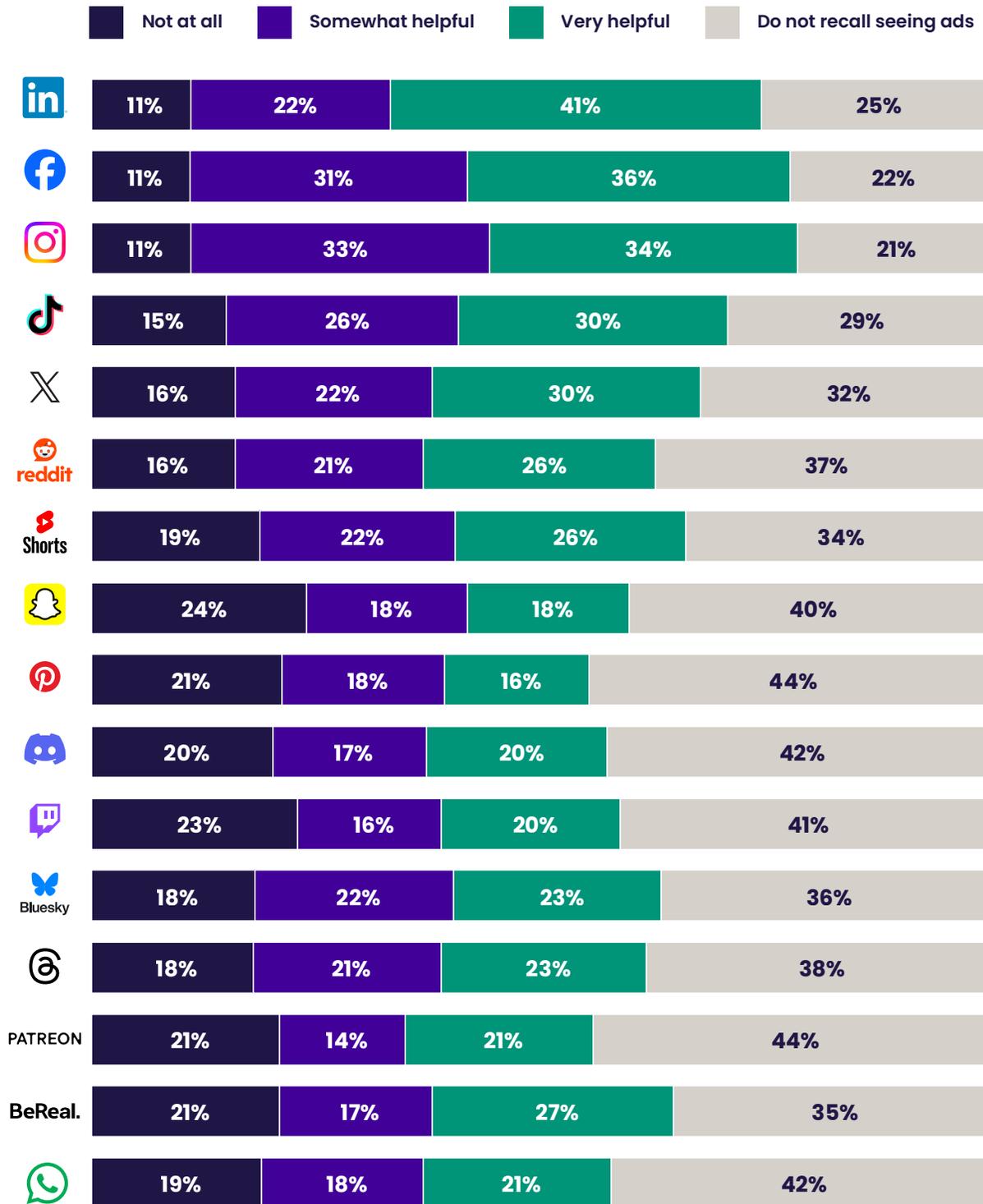
that present program details, career outcomes, or institutional value propositions. Non-traditional undergraduates also rated ads as helpful at moderate levels, especially on Instagram and TikTok, while traditional undergraduates were generally the least influenced. On nearly every platform, traditional undergraduates were more likely to report that ads were “not at all helpful” and more likely to state that they did not recall seeing any school-related ads at all—despite being among the most intense video consumers.

The perceived helpfulness of ads also aligns closely with the platform’s role in the student’s information ecology. Ads on LinkedIn, Facebook and Instagram—platforms used heavily for business searches, school research and news—were viewed as most impactful for Modern Learners overall, with roughly one-third or more rating them “very helpful.” In contrast, platforms with primarily social or entertainment-focused use cases (Snapchat, Pinterest, Discord) saw far lower levels of helpfulness and much higher rates of non-recall. This pattern highlights that platform context matters: students respond more positively to ads on networks where they already expect to encounter informational or professional content.

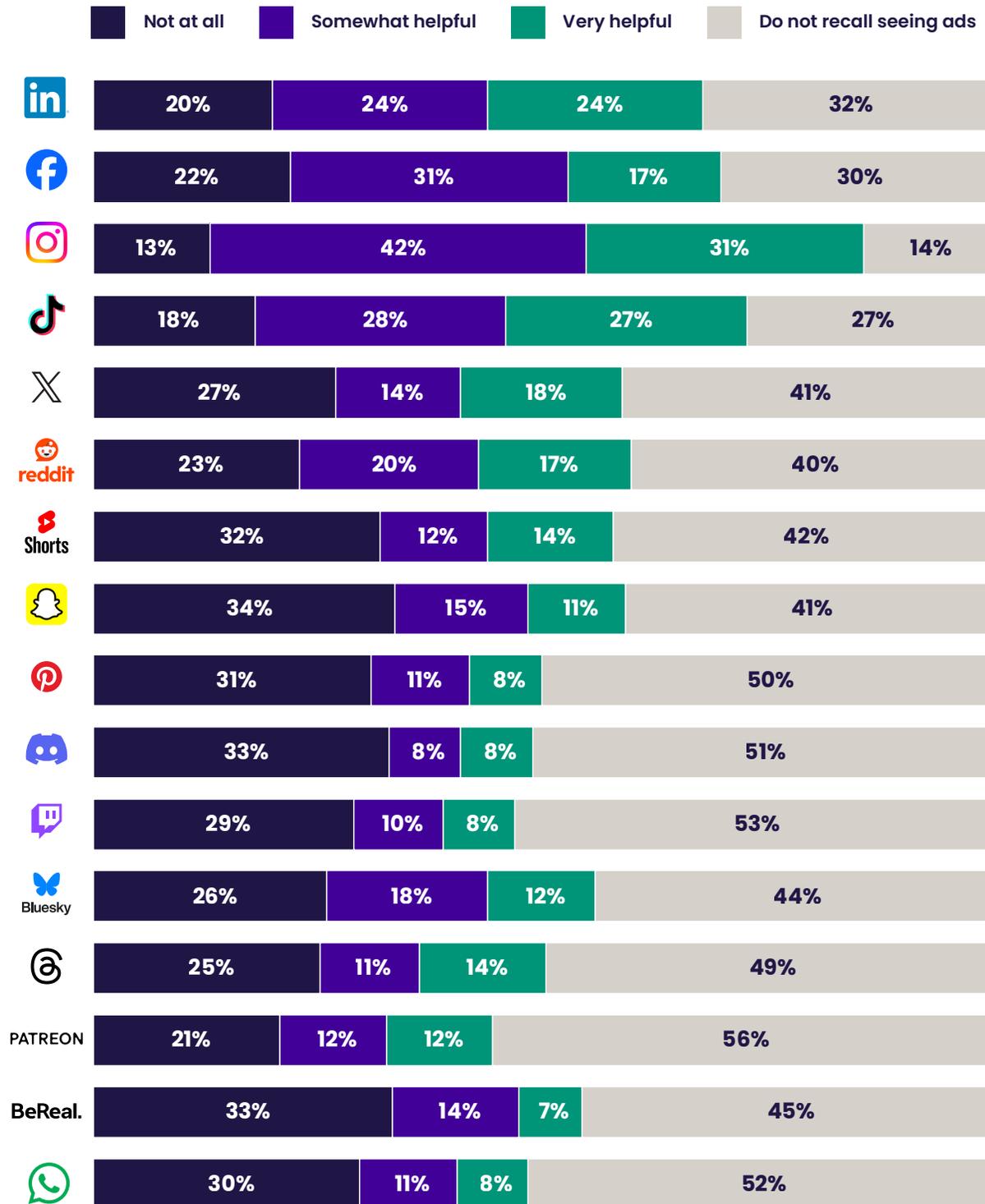
Taken together, the findings suggest that while Modern Learners see large volumes of ads and videos across social media, only ads that align with the platform’s informational role and the learner’s intent are likely to influence inquiry or application behaviors. Graduate students - who use social media most intentionally for school and career research—are therefore the most responsive audience. Whereas traditional undergraduates, who tend to use social media more socially and casually, are the least likely to notice or act on school-related advertising. Institutions seeking to maximize digital ad impact may benefit from tailoring message complexity, tone and placement strategically across platforms.



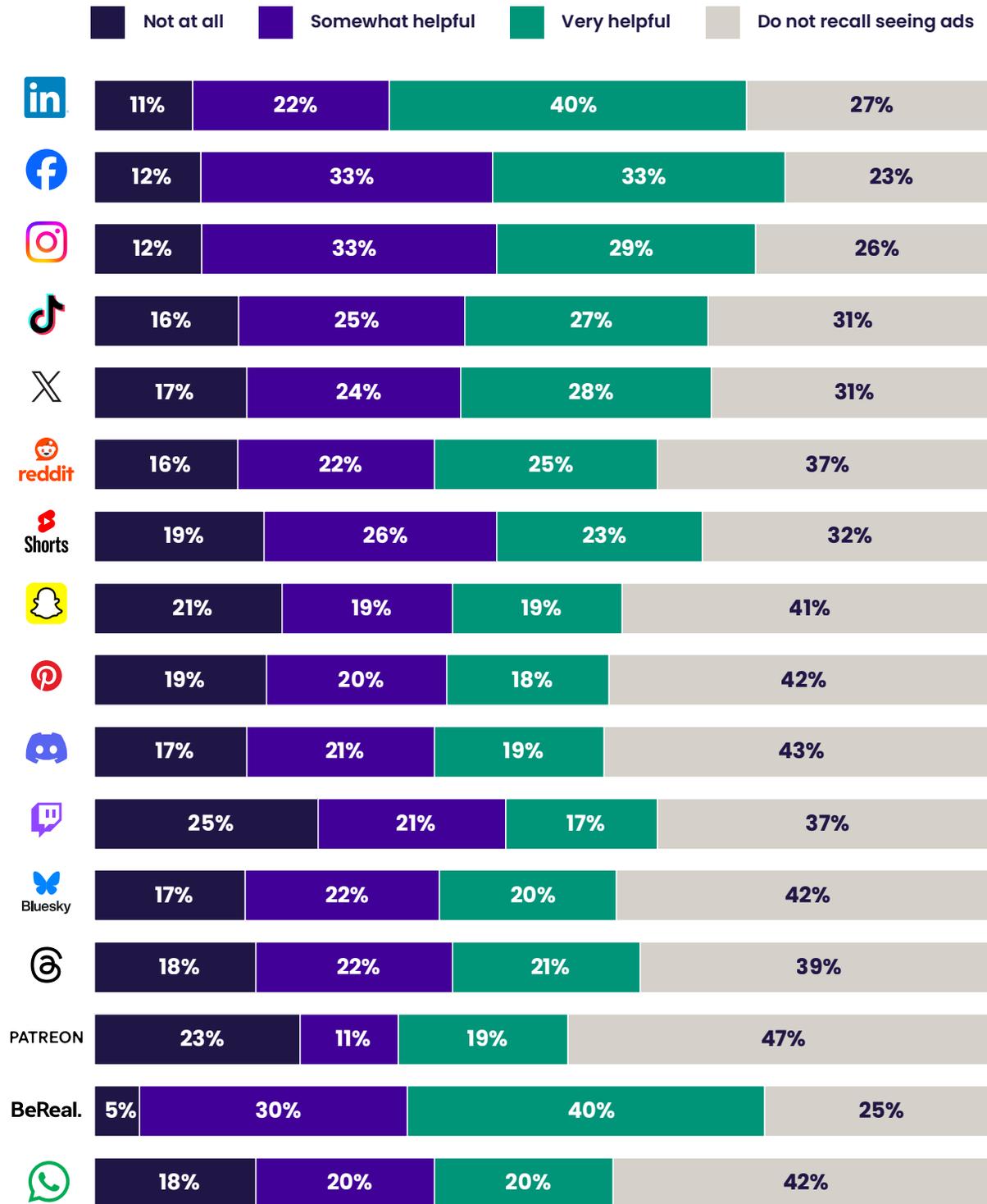
Helpfulness of Social Media Advertisements in Enrollment Decision-Making Total Population



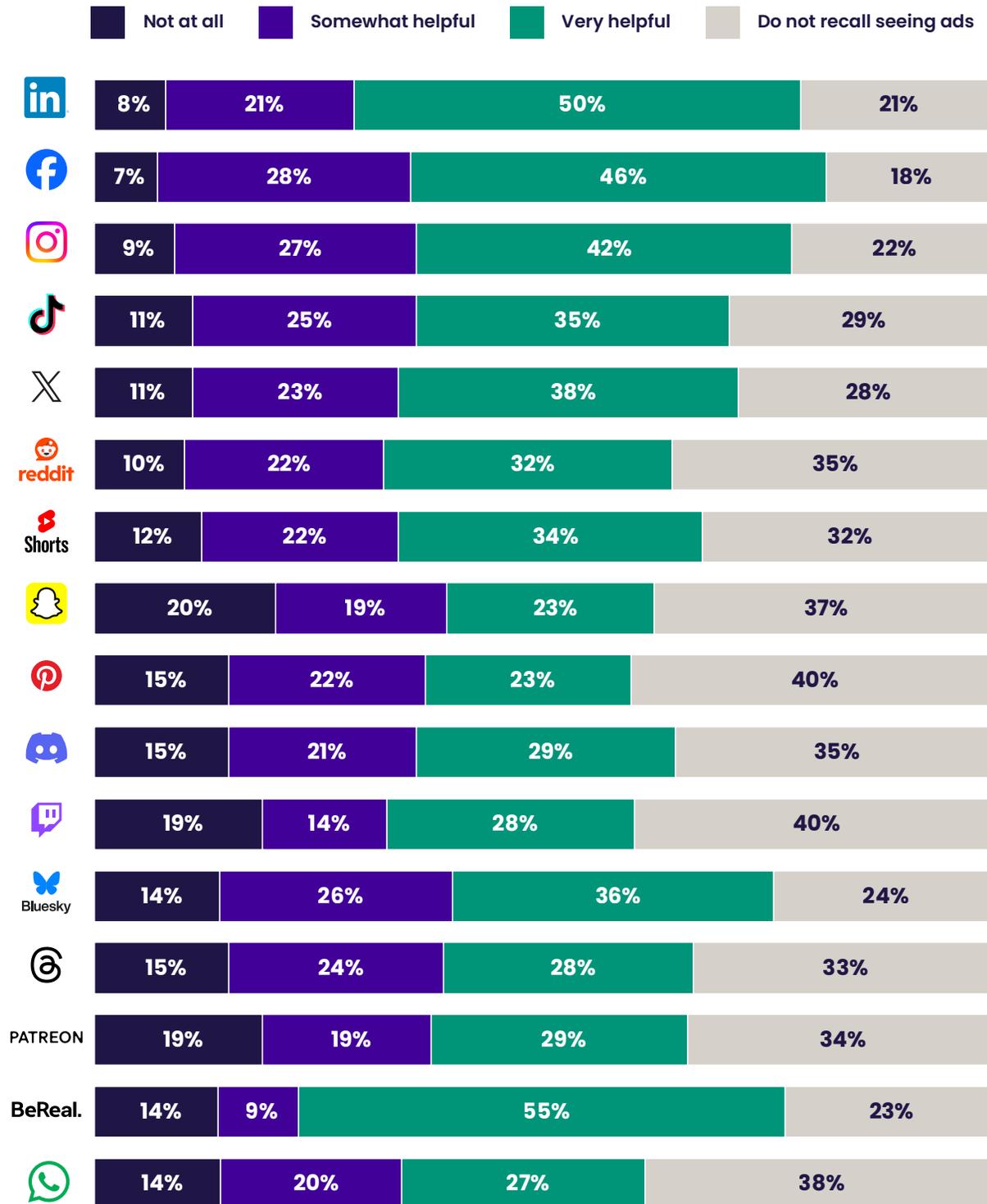
Helpfulness of Social Media Advertisements in Enrollment Decision-Making Traditional Undergraduates



Helpfulness of Social Media Advertisements in Enrollment Decision-Making Non-traditional Undergraduates



Helpfulness of Social Media Advertisements in Enrollment Decision-Making Graduates

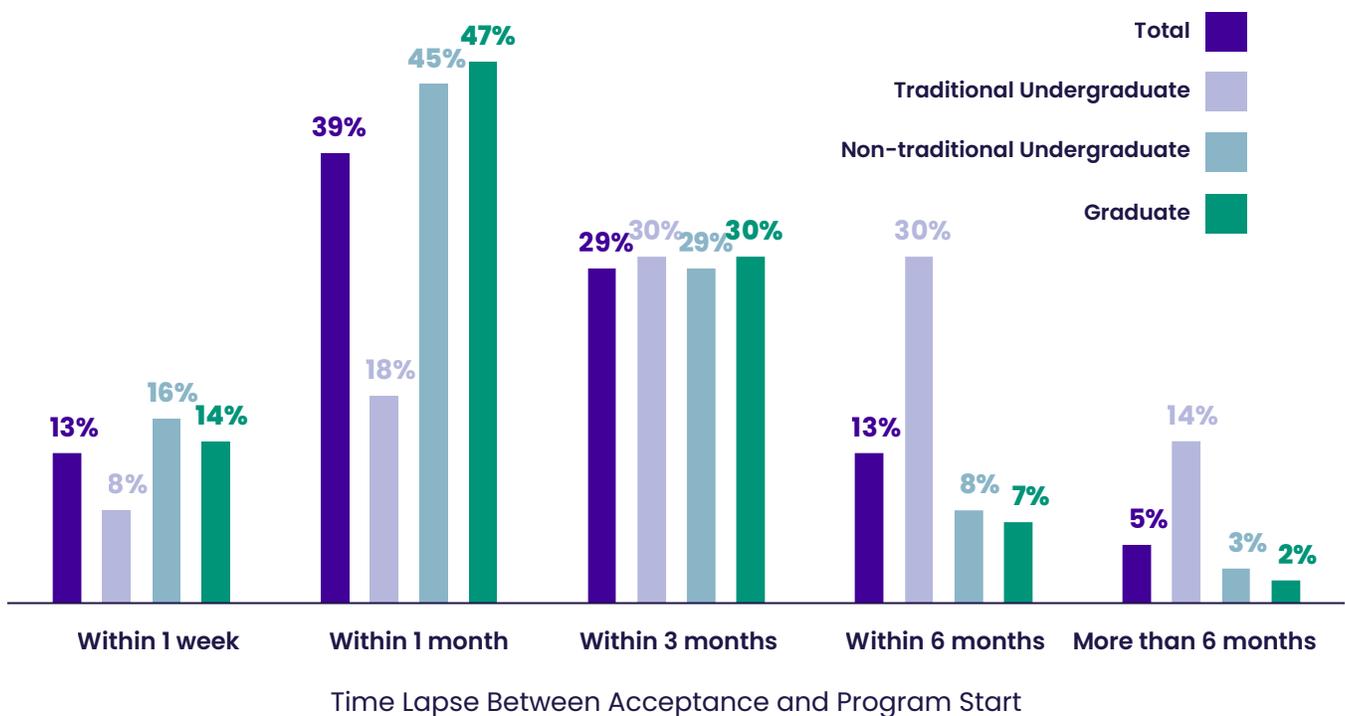


Enrolling Today's Modern Learner

Expected Timing of Classes After Acceptance

Modern Learners hold strong expectations that classes will begin relatively soon after acceptance. More than half expect classes to start within one month and nearly three-quarters expect a start within three months. Graduate students show the strongest desire for rapid progression, with close to half expecting a start within one month. Traditional students hold distinct expectations. Thirty percent expect class start dates to fall three to six months after acceptance, revealing a more relaxed or seasonal timing expectation that aligns with the traditional academic calendar rather than the continuous enrollment models favored by other segments of Modern Learners.

Expected Time Between Acceptance and Program Start



Helpful Enrollment Support Services

Modern Learners identified several areas where additional support would streamline their enrollment. Transfer credit evaluation support and financial aid guidance were the most desired services, each cited by more than four in ten respondents. Non-traditional and graduate students showed particularly strong interest in application and registration assistance, signaling the need for more navigational support. Traditional students prioritize social and community opportunities, reflecting their greater engagement with campus life. Across all groups, frequent contact from enrollment staff and faculty ranked highly, reinforcing the importance of proactive, personalized communication in the modern enrollment process.

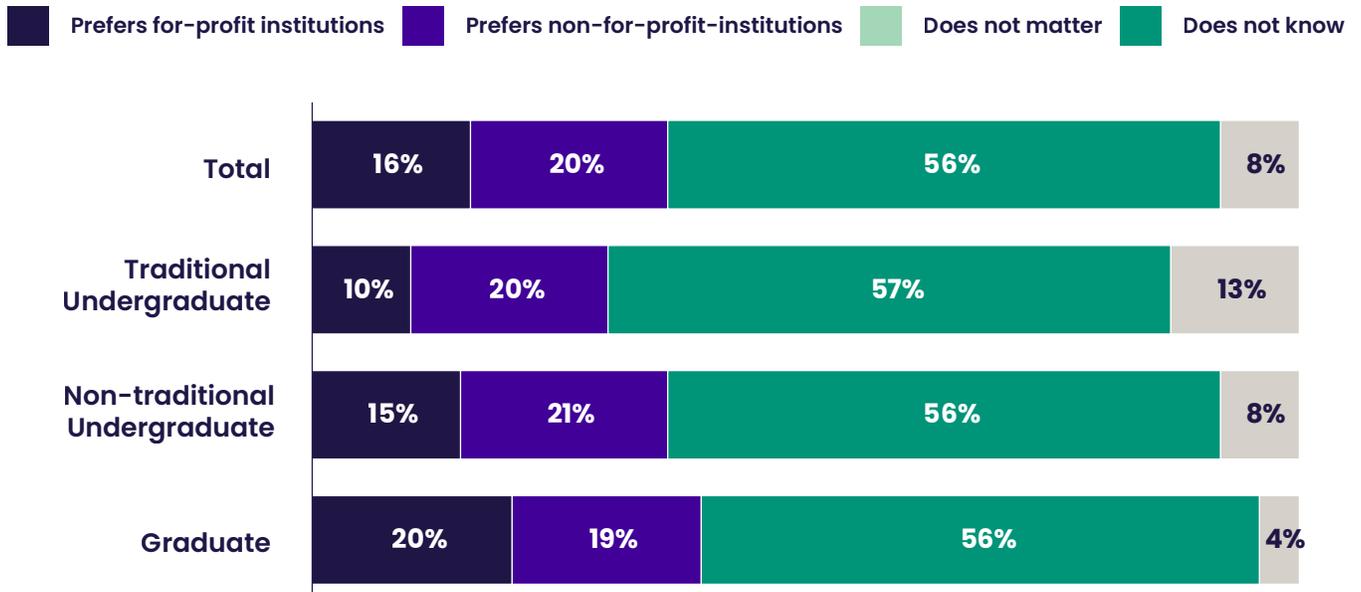
Helpful Enrollment Support Services

Helpful Enrollment Support Services	Total	Traditional Undergraduate	Non-traditional Undergraduate	Graduate
More support in understanding how my credits will transfer	42%	43%	41%	44%
More support with scholarships and financial aid	42%	48%	42%	38%
Frequent contact from enrollment staff	36%	34%	36%	37%
Course registration assistance	31%	34%	32%	27%
Application assistance	30%	26%	32%	31%
Frequent contact from faculty	26%	23%	25%	30%
Ability to request more program information on program webpage	22%	19%	22%	24%
Ability to apply to program from webpage link on program webpage	22%	16%	22%	26%
Ability to engage with school through online chat on webpage	20%	11%	24%	23%
No standardized test score requirements	19%	22%	20%	17%
Social and community opportunities at the destination institution	19%	22%	16%	21%
Something else	1%	1%	0%	0%

Preferences for Nonprofit vs. For-Profit Institutions

A majority of Modern Learners expressed no strong preference for nonprofit versus for-profit institutions, with 56 percent stating it does not matter. However, graduate students were more likely than other groups to prefer for-profit institutions, likely due to perceptions of accelerated timelines, strong career alignment or flexible modalities. Traditional students were the most likely to express uncertainty.

Preferences for Nonprofit vs. For-Profit Institutions





Alignment, Not Effort, Defines the Next Era

Enrollment instability is not a performance problem. It is a model alignment problem. Institutions cannot perpetuate or double down on existing strategies and processes. Those that continue to optimize inside legacy systems will experience diminishing performance resulting in lower enrollment, volatile yield, unpredictable melt and early attrition.

Institutions that align to the New Enrollment Model will regain something more valuable than growth—predictability. The moment calls for urgency, not for urgency's sake, but to align with the Modern Learner. In a decision environment where learners decide earlier, validate continuously and retain agency longer. Effort is no longer the deciding factor. Alignment determines outcomes.

Key differences between Traditional Undergraduate, Non-traditional Undergraduate and Graduate Modern Learners

Higher education's enrollment volatility is not evenly distributed across learner segments. Instead, it reflects structural divergence in how traditional undergraduates, non-traditional undergraduates and graduate students interpret value, risk and return. The differences between these populations no longer sit at the margins of recruitment strategy—they *define* whether institutional models align with how enrollment actually functions in 2026.

The findings below illustrate that today's instability is a predictable result of model drift. Institutions are operating based on assumptions optimized for yesterday's learners, while today's students behave according to fundamentally different logics.

Traditional vs. Non-Traditional Undergraduate Students: Diverging Enrollment Physics

Format Expectations Reveal Flexibility as Infrastructure

Traditional undergraduate students continue to anchor their expectations in physical presence. Fewer than 25% of traditional undergraduates considered fully online or hybrid formats during exploration and 70% ultimately enrolled in residential, on-campus programs. In contrast, non-traditional undergraduates operate in an entirely different infrastructure reality: 85% considered online programs and 42% considered hybrid options.

This divergence reinforces a core strategic finding: flexibility is no longer a differentiator—it is the mechanism that keeps learners in orbit. For non-traditional undergraduates, format is not a preference layered onto experience; it is the prerequisite that determines whether enrollment is even feasible.

Program Choice Signals Career Reorientation vs. Career Entry

Traditional and non-traditional undergraduates are not simply studying different subjects—they are solving different problems.

Only 15% of traditional undergraduates enrolled in business programs, compared to 22% of non-traditional undergraduates. Similarly, 8% of traditional undergraduates enrolled in computer and IT fields, compared to 19% of non-traditional students. Traditional undergraduates remain more oriented toward STEM and arts and humanities, while non-traditional students cluster in fields more directly tied to labor market repositioning.

This distinction aligns with a broader strategic shift: program demand is rebalancing by segment as learners become more informed about AI-proofing their careers. Non-traditional undergraduates are not exploring identity; they are recalibrating trajectory.

Career Motivation Drives Time Sensitivity

Non-traditional undergraduates are far more likely to enroll to start a new career and earn more money, while traditional undergraduates focus on obtaining their *first* professional role. As a result, non-traditional students place significantly more importance on speed to completion and rapid entry into programs.

This difference manifests clearly in admissions expectations. Traditional undergraduates rated admissions decision timing at 3.5 on a 5-point scale, while non-traditional undergraduates rated it a 4.0. The implication is structural: enrollment timing itself has become a form of risk exposure for non-traditional learners, not a procedural step.

This reinforces the strategic reality that the post-acceptance window is now one of the highest-risk zones in the enrollment journey—especially for learners whose opportunity cost is measured in wages, not semesters.

Career Services: Soft Skills vs. Skill Execution

Traditional undergraduates gravitate toward career counseling and internships, reflecting their proximity to initial workforce entry. They prioritize soft-skill development—problem solving, communication, teamwork and decision-making—skills that support early professional socialization.

Non-traditional undergraduates, by contrast, seek workshops and skill-based career services, with a stronger emphasis on data analysis, AI, operations, customer service and business software. Non-traditional undergraduates also engage career services earlier, often at the point of enrollment, rather than after the first year.

This difference underscores a central strategic finding: career clarity is the center of gravity that stops learners from re-evaluating. Non-traditional learners do not want reassurance; they want execution support.

Influence Patterns Reveal the Decline of Experiential Signaling

Traditional undergraduates remain more influenced by experiential cues—in-person events, proximity to campus and on-site engagement. Fifteen percent applied at a college fair or similar event, compared to just 5% of non-traditional undergraduates.

Non-traditional students are more likely to be influenced by conversations with staff and advisors, reinforcing the shift away from brand-led signaling toward real-time system validation. Reputation no longer operates as a static asset; it must be *experienced* through responsiveness, clarity and competence.

Cost vs. Completion: A Shift in What “Value” Means

Lower tuition remains the single most influential lever for traditional undergraduate enrollment decisions. These students also seek more detailed cost information on institutional websites, reflecting parental involvement and upfront price sensitivity.

Non-traditional undergraduates, however, place greater weight on faster time to completion, reframing value as *total cost of delay*, not sticker price. This reinforces the strategic finding that the Three Cs—cost, convenience and career—are now threshold conditions, not points of differentiation.

Media Behavior and Reputation Sensitivity

Traditional undergraduates are more active on Instagram and TikTok, while non-traditional undergraduates rely more heavily on Facebook and LinkedIn. These channels are not interchangeable; they reflect fundamentally different information-seeking behaviors.

Notably, non-traditional undergraduates assign greater importance to institutional reputation than traditional students. Twenty-one percent indicated reputation was more influential than other factors, compared to 15% of traditional undergraduates. This reinforces the idea that reputation now functions as a validation system, especially for learners taking higher personal and financial risk.

Satisfaction and Loyalty Gaps

Traditional undergraduates are less likely to rate their program experience highly, less likely to recommend their program format and less likely to enroll in another program at their current institution. This suggests that experience alone does not generate loyalty, especially when expectations are shaped by legacy narratives that no longer match reality.



Undergraduate vs. Graduate students: Escalating Precision, Not Just Advancement

Format Reversal at the Graduate Level

While 77% of non-traditional undergraduates enrolled in fully online programs, only 44% of graduate students did. Instead, 56% of graduate students enrolled in hybrid formats, signaling a preference for structured flexibility rather than full autonomy.

Graduate students are also more likely to enroll in distance programs that include synchronous components, reflecting a need for applied dialogue, peer benchmarking and instructor access.

Career Advancement vs. Career Entry

Graduate students overwhelmingly enroll to advance their current careers, not to change direction. As a result, they are more confident that their program will improve career prospects and place greater importance on career outcome data—particularly compared to traditional undergraduates.

They also assign higher importance to impact on themselves and their families, rating this factor at 4.2—higher than both undergraduate populations. Alumni networks carry more weight for graduate students, reinforcing the role of education as a career multiplier rather than a credential gate.

Cost Sensitivity Shifts, But Risk Remains

Graduate students who stopped out were less sensitive to cost than undergraduates—only 27% cited cost as the primary reason for leaving, compared to 39% of traditional and 32% of non-traditional undergraduates. However, lack of access to federal financial aid emerged as a key driver of graduate stop-out behavior.

This reinforces a critical distinction: graduate students are less price-sensitive, but more financing-sensitive.

Skill Expectations Converge with Non-Traditional Undergraduates

Graduate students mirror non-traditional undergraduates in their preference for hard, applied skills—data analysis, AI, operations, customer service and business software—rather than soft-skill development.

They also expect more personalized and focused outreach from institutions, reflecting a higher tolerance for complexity but a lower tolerance for generic messaging.

Decision Influence, Speed and AI as the Front Door

Graduate students, like non-traditional undergraduates, are more influenced by direct interactions with staff and advisors than by experiential signals. They also value faster time to completion, rating its importance at 4.3 compared to 3.6 for traditional undergraduates.

Graduate students are the most active users of AI tools in the enrollment process. Ninety-two percent reported

using AI chatbots and they are significantly more likely than undergraduates to take action based on AI results—visiting school websites, comparing institutions and requesting information. They are also more likely to agree that AI tools helped them discover programs they would not have found otherwise and to trust AI in future enrollment decisions.

This directly reinforces the strategic finding that AI is now the front door—and it filters based on the Three Cs.

Reputation, Reviews and Consistency as Risk Management

Graduate students place greater importance on institutional reputation, consistent messaging across programs and online reviews than either undergraduate population. Two-thirds seek reputational information via search engines and they are more likely to consult student reviews directly on institutional websites.

In this context, reputation functions not as marketing—but as risk mitigation.

Cost Tradeoffs and Financial Aid

While undergraduates are more likely to enroll at the lowest-cost institution, graduate students prioritize ideal format, schedule and location. They are more likely to carry student loan debt, yet place less weight on scholarships and financial aid in enrollment decisions—reflecting a more calculated, return-based investment mindset.

Strategic Implication: Segmentation Is Now Structural

Across all populations, the data confirms a central truth of the 2026 Modern Learner: enrollment no longer begins with inquiry and it no longer unfolds in a linear funnel. Learners arrive informed, filtered and pre-validated—often before institutions ever engage.

The differences between traditional undergraduates, non-traditional undergraduates and graduate students are not surface-level preferences. They represent distinct enrollment systems operating in parallel, each with its own thresholds, failure points and stabilizers.

Institutions that continue to treat these populations as variations on a single model will experience increasing volatility. Those that realign structure, messaging and infrastructure to match learner reality will find that stability was never lost—it simply moved.

Methodology

The 2026 EducationDynamics Modern Learner report was fielded using an online survey panel between October and November, 2025 – reflecting the entry of the 2025-2026 Modern Learner into the population. All respondents were incentivized for their participation.

In total there were 3,002 respondents – With 1,999 undergraduate and 1,003 graduate. Among the undergraduate population, 701 were considered traditional undergraduate students (18-22 years old, study on campus). The remaining 1,298 undergraduate students were considered non-traditional undergraduate students – students who were 18-22 and were not enrolled in campus-based study or those 23 and older enrolled in any format of study.

Note that graduate Modern Learners were those who were enrolled in non-classroom-based study only.

All respondents were screened for qualification – ages 18 and older, currently enrolled, stopped out, or have firm plans to enroll in post-secondary or graduate study within the next year in a credit-bearing degree or certificate program.



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