



Membership matters.

Enrolling Gen Z: What the Prospective Student Survey™ Tells Us About Pivoting to Serve the Next Generation

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Eduventures Research*



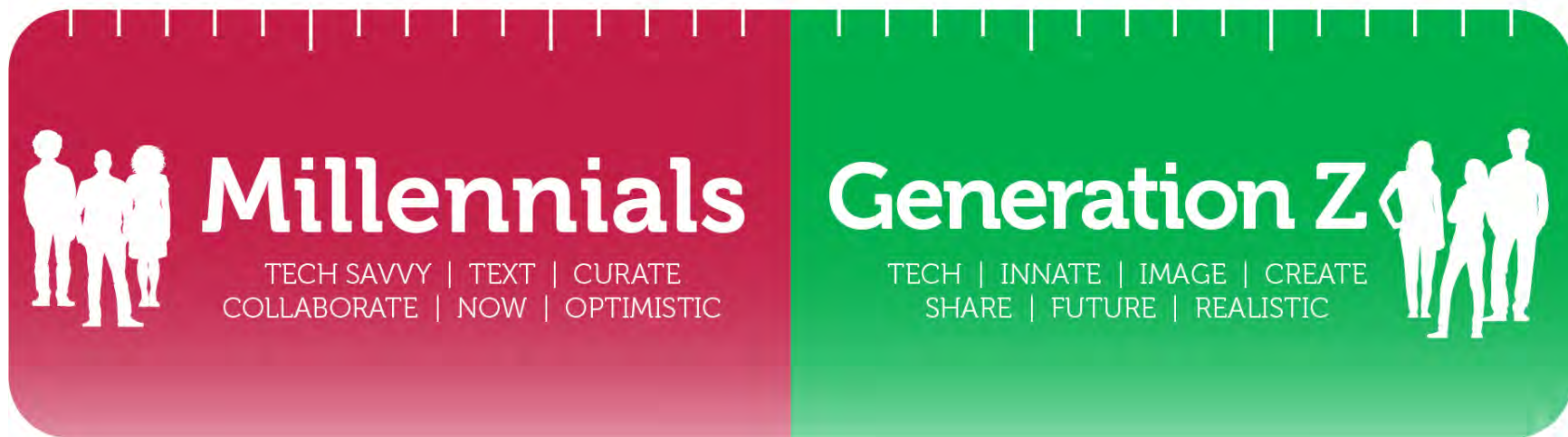
Now Enrolling Gen Z

Have you made shifts in practice?

1980

1995

2010

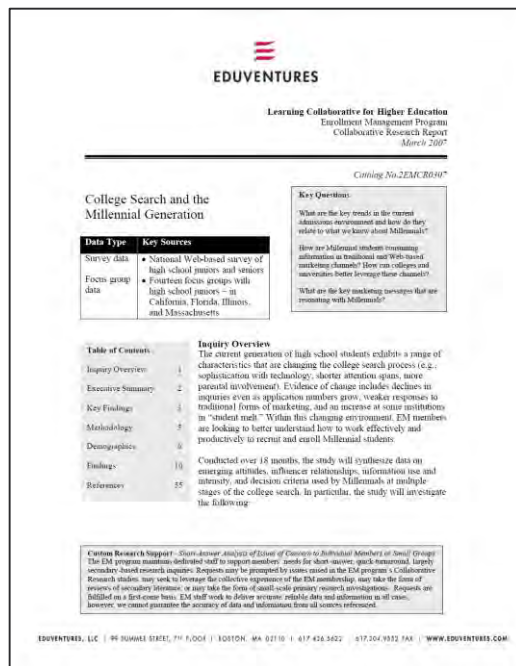


Generational Shifts



The Song Remains the Same...

...but the generational shifts make for a more complex melody



*“Against this often confusing backdrop, students of the Millennial generation are doing what college-bound students have always done: Looking for a **“good fit,”** looking for and opportunity to **test their skills, to learn and develop, to have fun, and to set the direction for a productive career and civic life... and Millennials more typically than not are weighing the college decision in light of their long-term professional plans: Even students who don’t know what they want to do professionally acknowledge the interplay between their college choice and career success.”***

Source: Eduventures 2007 Report, *College Search and the Millennial Generation*

The Song Remains the Same...

...but the generational shifts make for a more complex melody

Good Fit

Test Their Skills

Learn and Develop

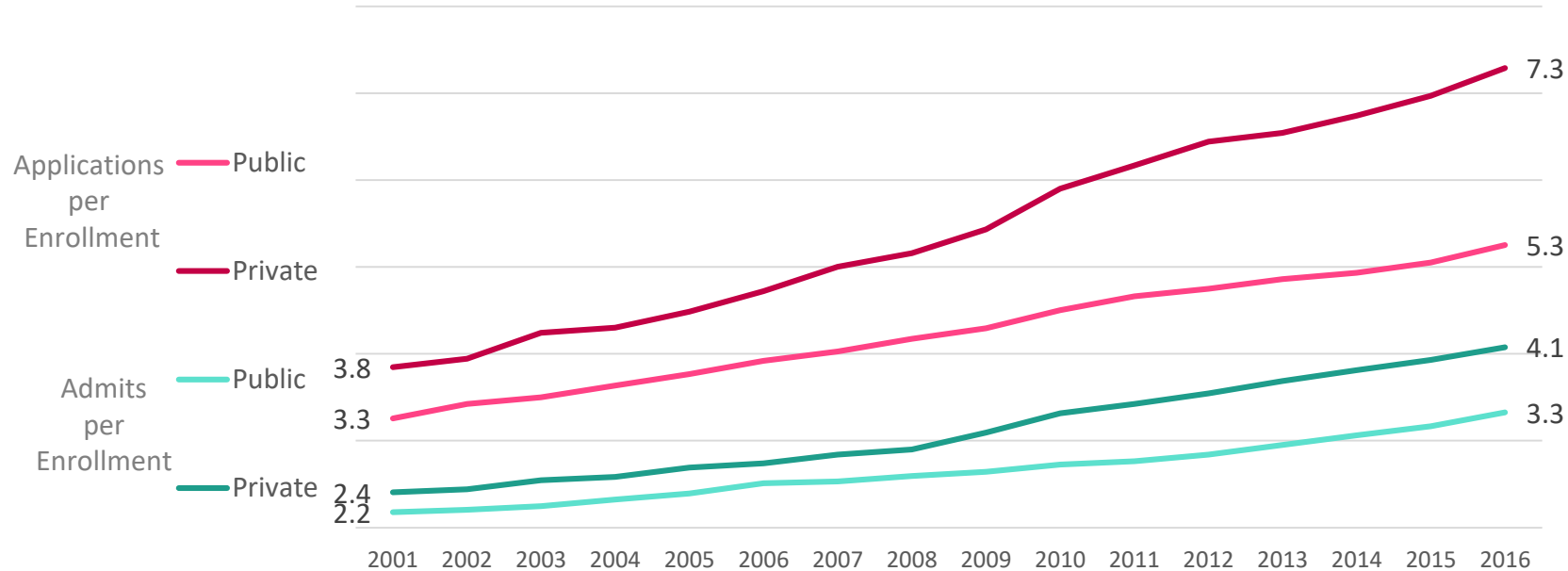
Have Fun

Productive Career



A Much More Frenzied Enrollment Environment

Application and Admission Trends for First-Time Full-Time Freshmen 2001 to 2016



Understanding the Reality of Financing College

Millennials Interested in Public Institutions

19% ↑ in tuition and fees from 1997-2007 (in constant dollars)



Understanding the Reality of Financing College

Millennials Interested in Public Institutions

	Expectations	vs.	Reality
Grants & Scholarships Only	56%		25%
Loans	29%		51%

Unwelcome surprise amid escalating costs

Understanding the Reality of Financing College

Gen Z Interested in Public Institutions

14% ↑ in tuition and fees from 2007-2017 (in constant dollars)



Understanding the Reality of Financing College

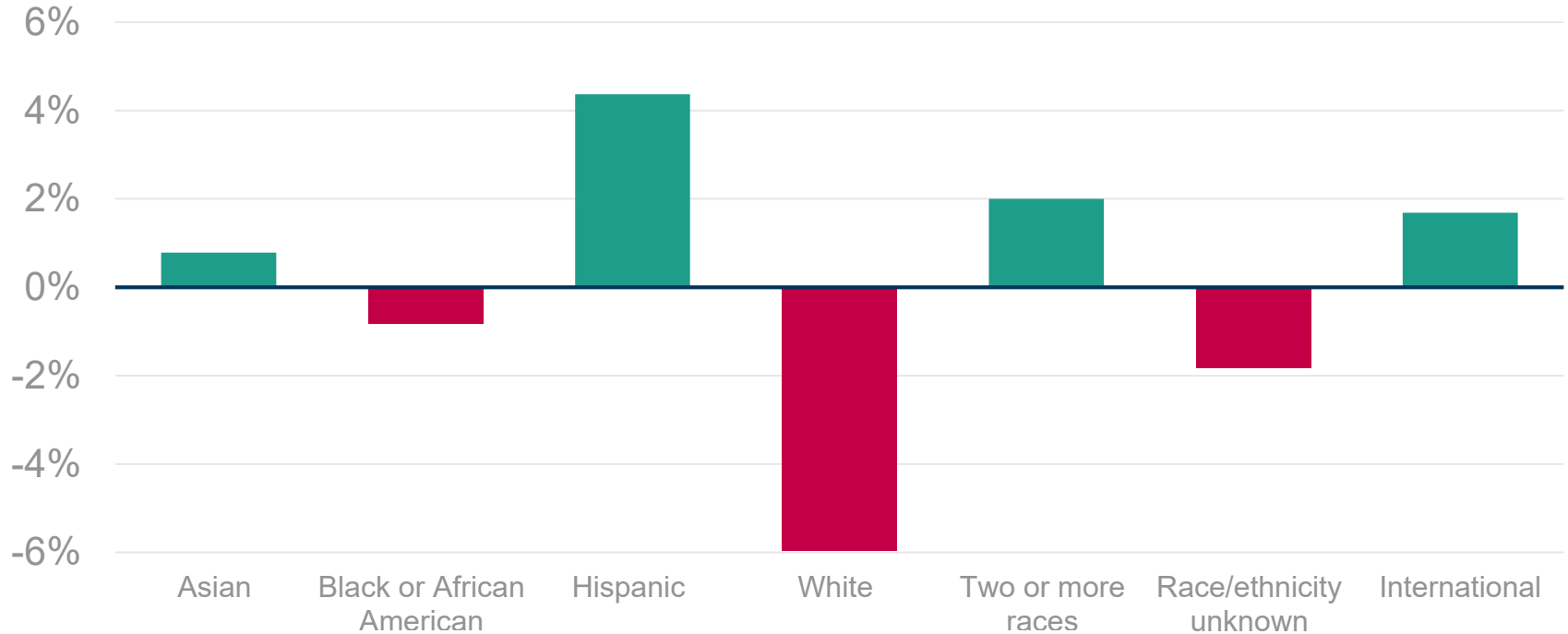
Gen Z Interested in Public Institutions

	Expectations	vs.	Reality
Grants & Scholarships Only	38%		34%
Loans	48%		41%

More prepared for a difficult future

Demographic Shift Happening Now

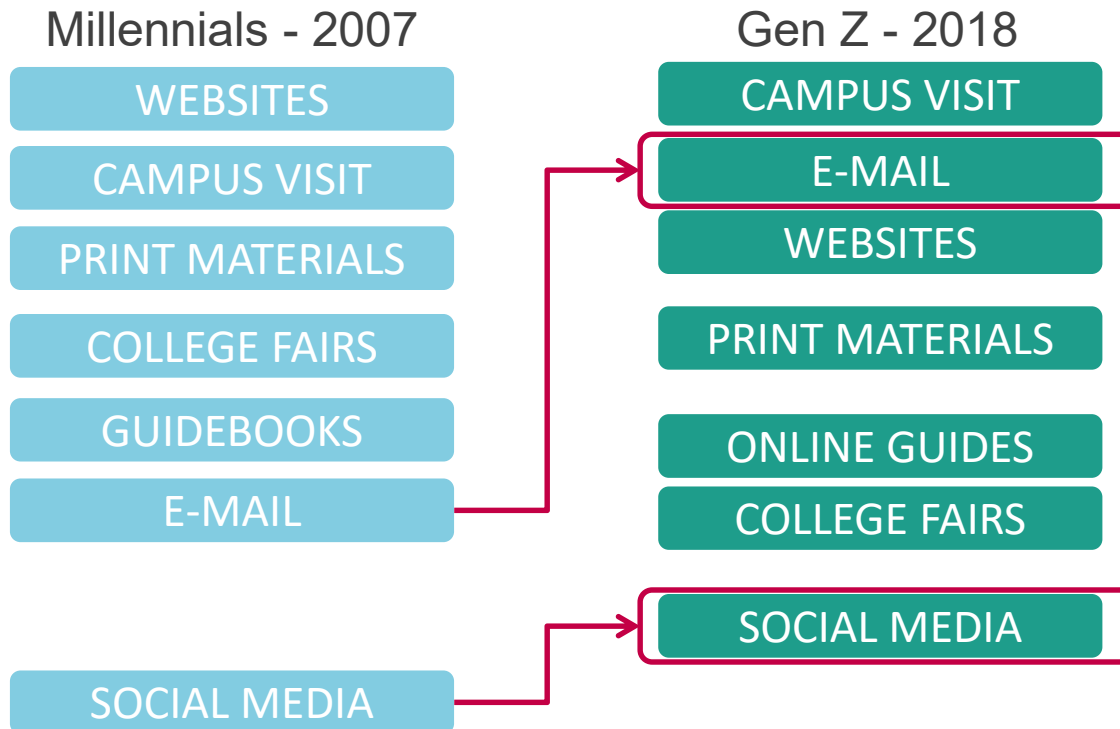
Change in Undergraduate Enrollment by Race/Ethnicity 2010 - 2016



*First-time fulltime degree and certificate seeking students from NCES

* American Indian or Alaska Native and Native Hawaiian or Other Pacific Islander less than 1% change

Recruitment Environment in Flux



22%

Gained
awareness by
online
advertising

Gen Z Frames the World Differently

How will this affect their experiences with higher education?

	Millennials	Gen Z (I Gen)
Outlook on life	FOMO	Defer gratification, no debt
Purchasing	Curate, authenticity	Rent, borrow, trade
Technology	Exceptional use	Ubiquitous use
Authority figures	Conditioned to advocate	Licensed to act
The environment	Intellectual conservation	Visceral conservation
Relationships	Collaborate, connections	Compromise, trade-offs

Source: Eduventures 2016 Summit Presentation, Your New Recruiting Class: What are They Really Thinking? Tammy Erickson

What research says about serving Gen Z

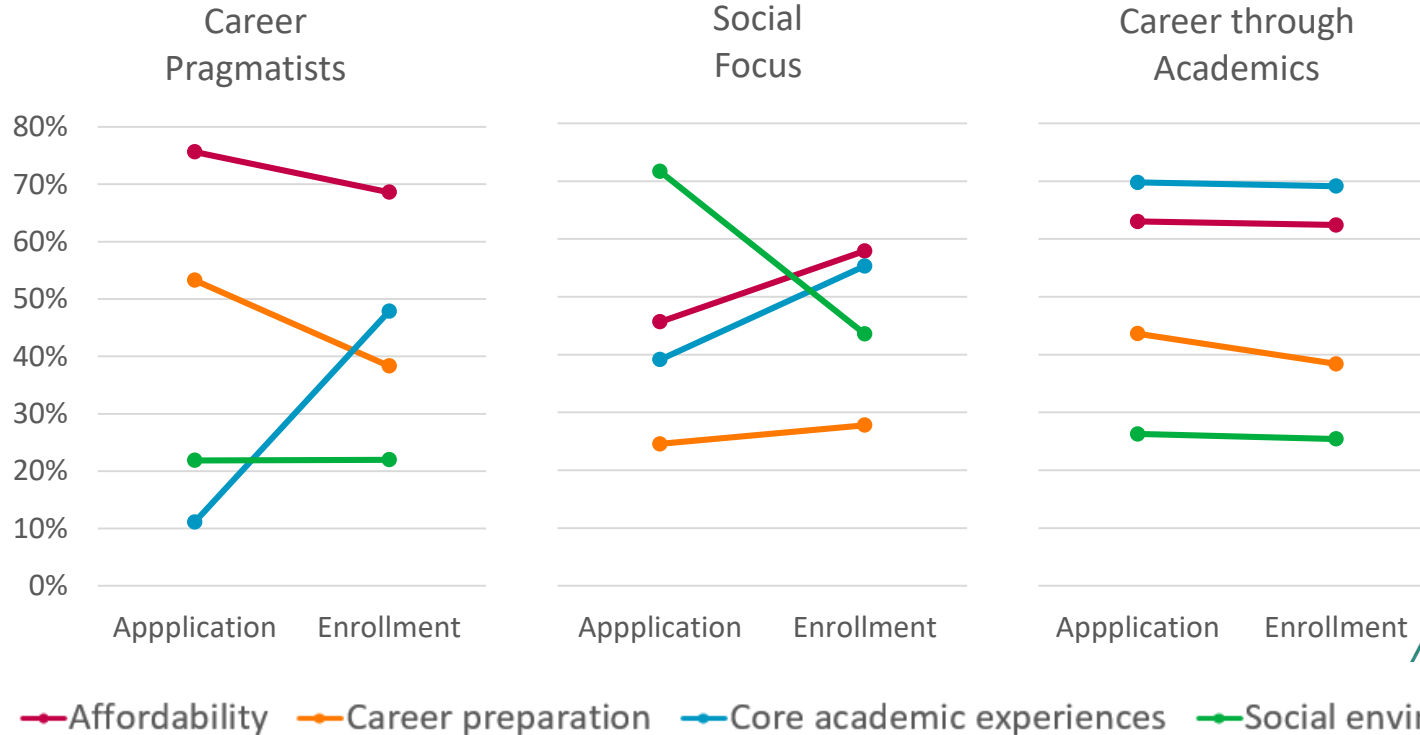


Gen Z has Different Paths in Mind

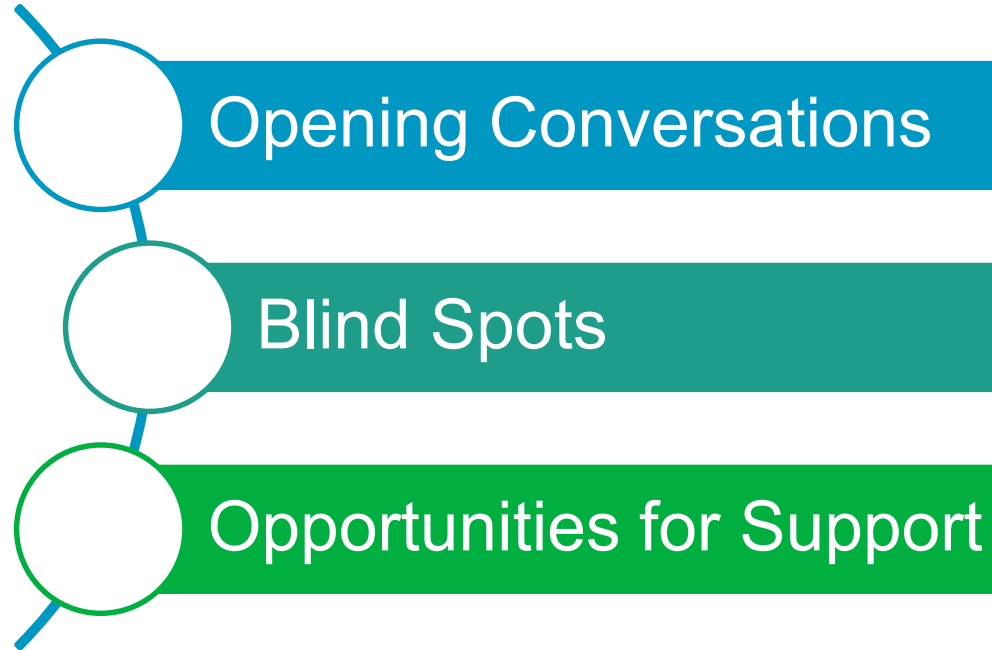


Different Mindsets, Different Learning Journeys

Driver Importance at Application and Enrollment

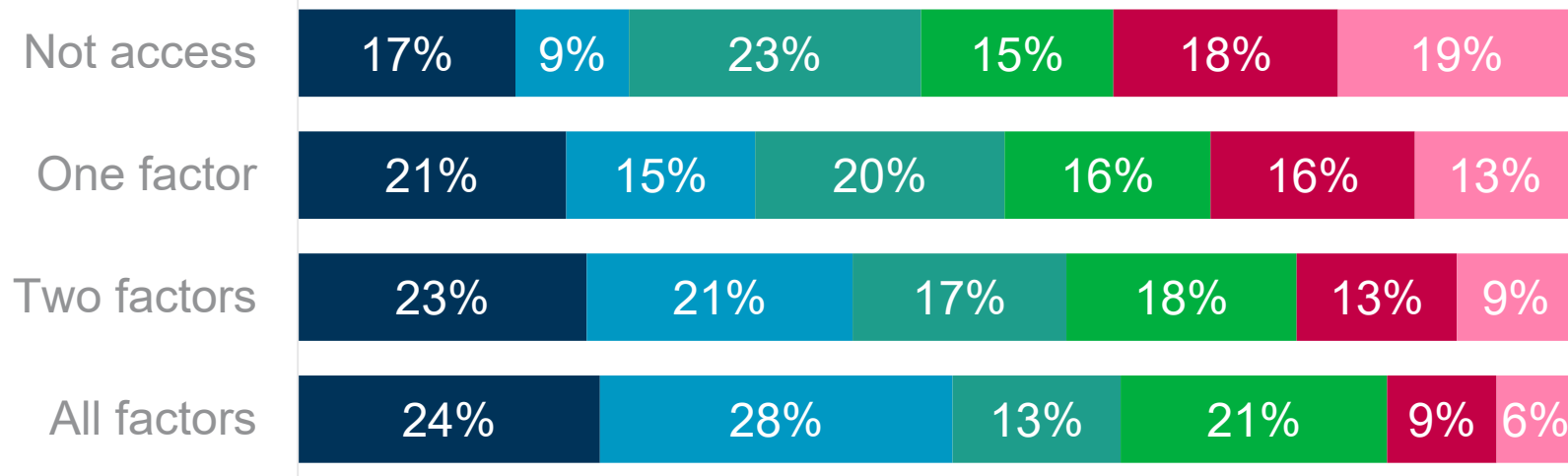


Work in Phases with Students Mindsets



As Demography Shifts, Career Orientation Likely to Increase

Student Mindsets by Access Status



■ Experiential Interests

■ Career Pragmatists

■ Social Focus

■ Exploration and Meaning

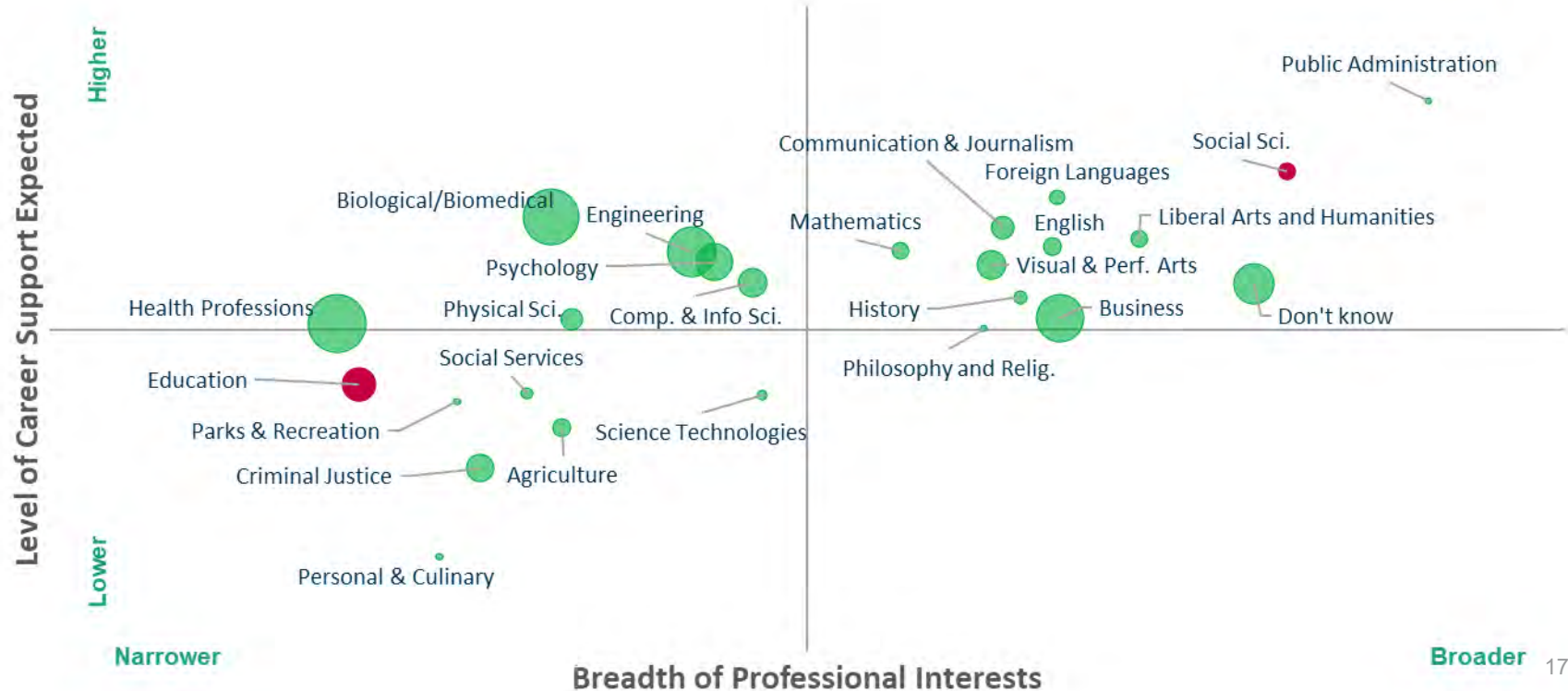
■ Career through Academics

■ Grad School Bound

Access Factors = First-generation college; low-income; underrepresented minority

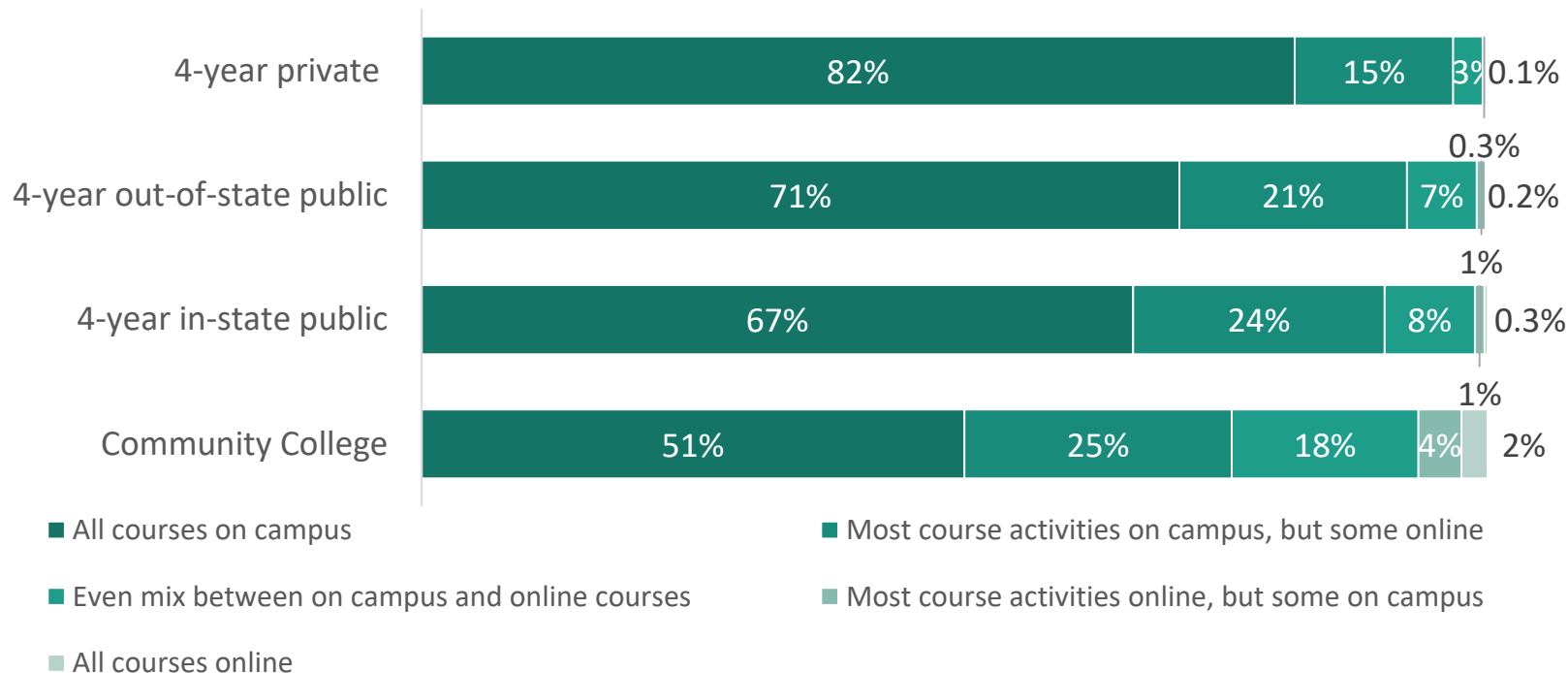
Articulating Links from Major to Career is Critical

Career Articulation of Majors



Give Developmental Experience of Traditional Education to Digital Natives

Course Mixture Gen Z Students Expect in College



Adopt an Affordability Strategy that Takes the Long View

Perception of Affordability Outweighs Net Cost in Final Decision

Institutional Destination	Perception of Affordability : Net Cost Ratio
In-State Public	11:1
In-State Private	17:1
Out-of-State Public	2:1
Out-of-State Private	2:1



Adopt an Affordability Strategy that Takes the Long View

The 4 Questions Gen Z Asks About College Affordability

- Can I afford to choose this school **right now**?
- Can I afford the **cost of attending over time**?
- Can I afford the **long-term debt**?
- Will it all be **worth it**?



Communications Savvy is a Threshold Requirement

What communications tip the balance in the enrollment decision?

- Great web and social are the price of entry
- Poor performance hurts, strong performance doesn't help
- Personal contact can seal the deal

Gen Z wants to be known



The Way Gen Z Knows Your Institution Matters

Brand Constructs that Tip the Enrollment Decision

In-State Public

Affordable
Fun/Exciting
Spirit School
Diverse

Out-of-State Public

Fun/Exciting
Career-Minded
Affordable
Friendly/Comfortable/Community

In-State Private

High Quality/Challenging
Friendly/Comfortable/Community
Career-Minded
Well-Rounded

Out-of-State Private

High Quality/Challenging
Prestige/Rigor
Career-Minded

The Melody is More Complex

Fit for Gen Z

Personal Pathway

Career Articulation

Future-Proof Affordability

Humanizing
Communications

Technology Mediated
Learning & Development



Thank you.

ANY QUESTIONS?

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