2026 ANNUAL REPORT

The State of Education Consumer Behavior

A data-driven look at how families, students, adult learners & institutional buyers decide — the AI gatekeeper, the decision journey, information sources, drivers & barriers, trust, cost & value, and the road to 2027.

K12 Academics — where families & buyers Find Your Community! since 2004

46%
of students use AI in college search

57%
of parents use AI to evaluate schools

96%
say communication sways their decision

68%
cannot find clear ROI information

EXECUTIVE SUMMARY

How families and buyers decide — in an AI-mediated marketplace

This report is the demand-side companion to our marketing analysis: where that report asks how institutions get found, this one asks how families, students, adult learners, and institutional buyers actually decide. The headline is a fast, structural shift: AI has become a gatekeeper, shaping which schools make a family list before anyone speaks to an admissions office. Around it, the enduring drivers — academic quality, cost and value, trust, and responsiveness — still decide who enrolls.

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Major trends

- AI has become a gatekeeper in the decision — before any human contact.
- Families are active co-decision-makers, not just funders.
- Value & outcomes now rival academics & cost.
- Expectations mirror consumer tech: fast, mobile, personalized.

Key findings

- 46% of students & 57% of parents now use AI to research schools.
- ~1 in 5 students removed a school based on an AI answer.
- Academic quality ranks #1; net cost is the top money factor.
- 96% say communication quality influences their decision.

Friction points

- An ROI-information gap: 68% cannot find outcomes data.
- Slow response & complicated applications lose families.
- Choice overload & decision fatigue.
- Eroding trust in generic marketing claims.

Opportunities

- Be visible & cited where AI research happens.
- Lead with transparent value, outcomes & proof.
- Respond fast; personalize; go mobile.
- Win trust with specific evidence, not slogans.

Who is deciding — and it is rarely one person

The education consumer is a household, not an individual. Parents, students, adult learners, and international families each bring different priorities, but they increasingly decide together — and parents have re-emerged as active co-decision-makers, not just funders. Understanding who holds influence at each stage is the foundation of understanding the decision.

The consumer is a household

Who holds influence

Parents — **active co-decision-makers** — not just funding sources.

Students — **digital natives** driving discovery & research.

Adult learners — **career-driven**, value flexibility & ROI.

International — **visa, cost & destination** weigh heavily.

The many education consumers

Different needs, shared journey

- Parents
- K-12 students
- College-bound teens
- Adult & online learners
- International students
- Homeschool families
- Institutional buyers

Each audience researches differently — but nearly all now begin the same way: **online, and increasingly with AI**.

From awareness to advocacy

The path from first awareness to enrollment — and on to referral and advocacy — is longer and less linear than ever. Families loop through discovery, research, comparison, and evaluation across many channels and devices before they ever inquire, and much of that journey now happens invisibly, in search results and AI answers, before an institution knows a prospect exists.

A long, non-linear path

Stages of the journey

Discover — **awareness & discovery** happen online, often via AI.

Compare — **research, comparison & evaluation** across channels.

Inquire — **inquiry & application** come late — after the shortlist forms.

Advocate — **enrollment → loyalty → referral** extends the journey.

The invisible early journey

Decisions before contact

Awareness · **Discovery** · **Research** · **Comparison** · **Evaluation** · **Inquiry** · **Application** · **Enrollment** · **Advocacy**

By the time a family inquires, the **shortlist is often already set** — which is why early visibility matters so much.

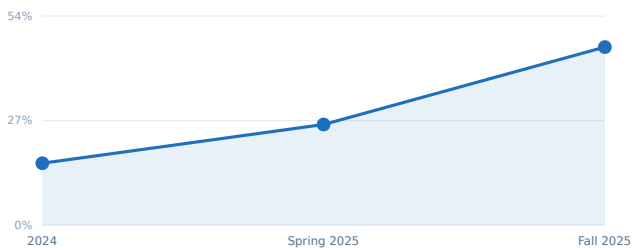
SECTION 03 — THE AI GATEKEEPER

The single biggest shift in how families decide

In barely a year, AI moved from novelty to gatekeeper in the education decision. Nearly half of college-bound students — and a majority of their parents — now use AI tools to research, compare, and filter schools. Crucially, AI does not just inform the list; it shapes it: about a third of families say AI surfaced a school they had not considered, and roughly one in five students removed a school based on an AI answer, often before any human contact.

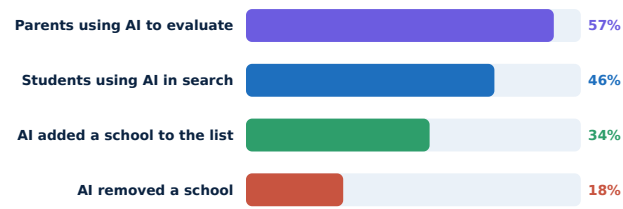
AI adoption in the search exploded

Students using AI in their college search



AI shapes the consideration set

How AI enters the decision



AI as a surrogate advisor

A new decision layer

46% / 57% of **students / parents** use AI to research schools.

Add **~1 in 3** say AI surfaced a school they had not considered.

Remove **~1 in 5** students removed a school on an AI answer.

Advise **1 in 4** have an ongoing AI conversation about the search.

What it means for schools

Visibility before contact

Cited if AI does not surface you, you are **invisible to the list**.

Accurate **consistent, correct info** across the web feeds AI answers.

Trust families know **AI can be wrong** — proof still matters.

Directories **authoritative directories** are prime AI sources.

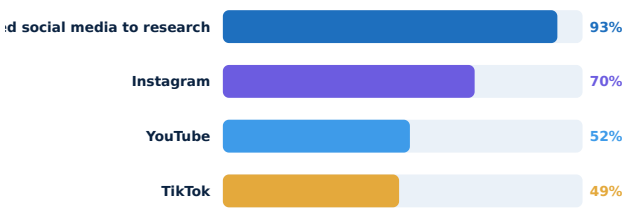
SECTION 04 — HOW CONSUMERS SEARCH & DISCOVER

Search, social, and synthesized answers

Families still start with search, but what search means is changing. A majority of searches now return an answer without a click, AI overviews summarize before a family visits a site, and social media has become a primary research tool — 93% of students use it to research schools, led by Instagram, YouTube, and TikTok. Reviews, rankings, and directories round out a discovery mix that is visual, social, and increasingly AI-summarized.

Social is a research engine

Where students research schools



The discovery mix

How families find schools

Zero-click **~58% of searches** end without a click.

Social **93% of students** research schools on social media.

Reviews **reviews & ratings** shape the shortlist.

Directories **directories & rankings** aid comparison & trust.

SECTION 05 — WHAT DRIVES THE DECISION

Academics first — then safety, values, and outcomes

When families choose, academic quality remains the top factor for both students and parents. But the surrounding criteria have shifted: campus safety, institutional values, and — for many families — political climate now weigh heavily, and career outcomes have moved to the center of the definition of quality. Families are asking a sharper question than ever: will this place be worth it?

The enrollment drivers

What matters most

Academics — **academic quality** — the #1 factor for students & parents.

Safety — **campus safety & wellbeing** rising sharply.

Values — **institutional values & climate** increasingly weighed.

Outcomes — **career & college placement** now define quality.

What families weigh

Beyond academics

- **Academic quality**
- **Safety**
- **Cost & value**
- **Career outcomes**
- **Class size**
- **Student support**
- **Mental health**
- **Campus culture**

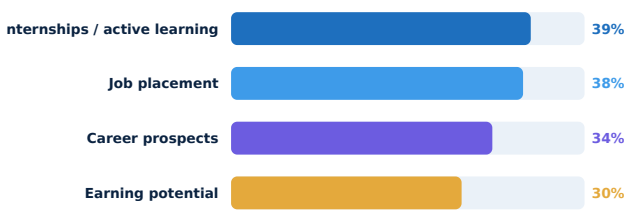
The bar has risen: families expect **quality and safety and demonstrable outcomes** — not a trade-off.

Net cost is the top money factor — but ROI is the new lens

Affordability has always mattered; what is new is how families evaluate it. Net cost — not sticker price — is the single most important financial factor, and families increasingly judge worth by outcomes: internships, job placement, career prospects, and earning potential. The problem is transparency: 94% call graduate outcomes essential, yet 68% say they cannot find that information.

Value is measured in outcomes

What makes a college worth the cost



The value equation

Cost, ROI & the info gap

Net cost — **net cost**, not sticker price, is the top money factor.

ROI — families judge worth by **outcomes & earnings**.

94% — call **graduate job outcomes essential**...

68% — ...but **cannot find** that ROI information.

Specific evidence beats polished claims

In a low-trust, AI-mediated market, credibility is the deciding currency. Accreditation, real student outcomes, reviews and testimonials, transparency, and data privacy all signal trust — while generic superlatives increasingly trigger skepticism. Families and AI models alike reward specific, verifiable evidence over marketing polish.

Signals that build trust

What families believe

Accredit — **accreditation & outcomes** anchor credibility.

Reviews — **reviews & testimonials** outweigh promotional claims.

Specific — **concrete evidence** beats generic superlatives.

Privacy — **data privacy & security** now shape trust too.

The trust stack

Proof over polish

- **Accreditation**
- **Student outcomes**
- **Reviews & ratings**
- **Testimonials**
- **Years established**
- **Transparency**
- **Data privacy**
- **Media coverage**

The fastest way to lose a skeptical family is a **claim they cannot verify**.

What quietly loses families

For every driver that attracts a family, a barrier can lose them. Cost and thin financial-aid clarity top the list, but so do information gaps, poor or slow communication, and complicated applications. Much of this friction is self-inflicted — and therefore fixable. Every unanswered question, confusing form, or delayed reply is a silent exit from the funnel.

The friction points

Why families drop out

Cost — **cost & unclear aid** are the top barriers.

Info gaps — **missing outcomes & cost** info erode confidence.

Complexity — **complicated applications** cause drop-off.

Silence — **slow or poor communication** quietly loses families.

Fixable friction

Self-inflicted losses

- **Unclear cost**
- **Limited aid clarity**
- **Missing outcomes data**
- **Complicated forms**
- **Slow responses**
- **Poor mobile experience**
- **Hard-to-reach staff**

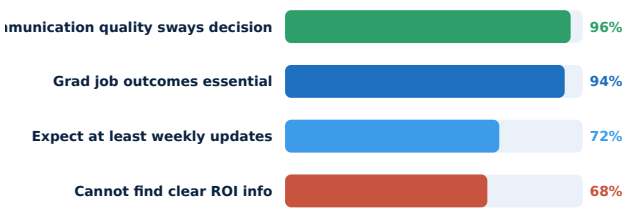
Reducing friction is often **cheaper and faster** than generating more demand.

Fast, personal, and on their terms

Families now hold education to consumer-tech standards. The quality of communication directed at them influences 96% of decisions; most expect at least weekly updates; and speed is decisive — institutions that respond within minutes convert inquiries several times more often than those that take a day. Personalization, mobile-first experiences, and self-service options are no longer perks but expectations.

What families expect

Communication & value expectations



Meeting the bar

Experience expectations

Speed — **sub-5-minute** response can convert 3-5× better.

Weekly — most families expect **at least weekly** updates.

Personal — **tailored, relevant** communication — not mass blasts.

Mobile — **mobile-first & self-service** are baseline.

SECTION 10 — THE PARENT & STUDENT SPLIT

Two audiences, one decision

Parents and students research the same schools differently, and reaching only one is a common, costly mistake. Students live on mobile, video, social, and AI, and lean on peer recommendations; parents dig into cost, outcomes, safety, and ROI, and increasingly use AI themselves. Winning the decision means speaking to both — in the channels and language each trusts.

The student

Mobile, video, AI-first

Mobile — **mobile & video-native** research.

Social — **social & peer** recommendations drive discovery.

AI — **AI as a first-stop** research assistant.

Career — **career focus** is rising early.

The parent

Cost, outcomes, safety

ROI — **cost, outcomes & safety** lead parent concerns.

Research — **deep digital research** — now including AI.

Influence — **high influence** on the final choice.

Trust — respond to **transparency & proof**.

What converts once they arrive

When a family reaches a website, first impressions form in seconds, and experience decides whether they stay. They want proof and story over polish: videos, virtual tours, student and parent testimonials, faculty profiles, FAQs, and increasingly interactive experiences that let them explore on their own terms. Static brochures are giving way to interactive publications and digital catalogs.

On-site behavior

What holds attention

Seconds — **first impressions** form almost instantly.

Proof — **video, tours & testimonials** outperform copy.

Explore — **interactive content** boosts time & trust.

Mobile — **mobile speed & UX** decide whether they stay.

Content families want

Proof & story, self-served

- **Videos**
- **Virtual tours**
- **Student stories**
- **Testimonials**
- **Faculty profiles**
- **FAQs**
- **Interactive experiences**
- **Digital catalogs**

Interactive formats — like the **experience suites & digital catalogs K12 Academics builds** — turn browsing into engagement.

The other education consumer

Not every education consumer is a family. Schools and districts are buyers too — of curriculum, software, services, and programs — and they decide very differently: by committee, over long cycles, with demos, free trials, references, and procurement rules. Trust, proof, and easy evaluation drive these decisions, and long-term renewal behavior depends on delivered outcomes, not the original pitch.

The B2B education buyer

How institutions purchase

Committee **group decisions** over long cycles.

Evaluate **demos, trials & references** reduce risk.

Procure **procurement & cooperative purchasing** shape the path.

Renew **renewal depends on outcomes**, not the pitch.

What buyers need

Trust & proof at scale

- **Product demos**
- **Free trials**
- **References & reviews**
- **Case studies**
- **Security & privacy**
- **Procurement fit**
- **Renewal support**

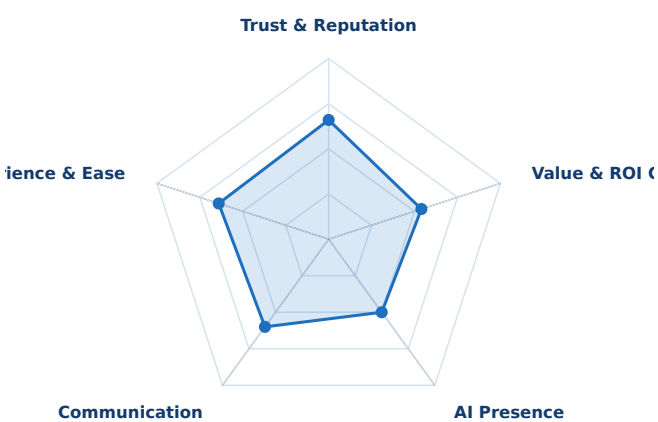
Institutional buyers reward **evidence, ease of evaluation, and delivered results**.

A K12 Academics framework for winning the decision

Whether a family chooses you comes down to confidence — and confidence is built across several fronts at once. The Index profiles an institution across five weighted pillars, so leaders can see where families trust them, where doubt creeps in, and where to invest to move more decisions in their favor.

Five-pillar profile

Illustrative — weights sum to 100



Trust & Reputation — 25%
Accreditation, reviews & proof.

Value & ROI Clarity — 20%
Transparent cost & outcomes.

Discoverability & AI Presence — 20%
Found & cited where they search.

Communication & Responsiveness — 20%
Speed, personalization & clarity.

Experience & Ease — 15%
Mobile, self-service & low friction.

SECTION 14 — THE 2027 OUTLOOK

Toward agentic, hyper-personal decisions

Toward 2027, the decision gets more AI-mediated, more personalized, and faster. Agentic AI will research, shortlist, and compare on a family behalf; hyper-personalization will tailor every touch; and conversational, voice, and immersive experiences will reshape discovery. Institutions that win will be discoverable to AI, radically transparent about value, and fast and human where it counts.

↗ What is coming

Agentic AI that researches & shortlists for families.

Hyper-personalization across every touchpoint.

Conversational & voice search & immersive tours.

Digital credentials & predictive, guided journeys.

! What to watch

AI accuracy & trust — wrong answers, real consequences.

Privacy & consent expectations rising.

The value conversation — proof or skepticism.

Human connection — still the tie-breaker.

For schools

- Be discoverable & accurate for AI
- Publish transparent cost & outcomes
- Respond fast; personalize; go mobile

For enrollment teams

- Engage parents as co-deciders
- Reduce application & info friction
- Win trust with specific proof

For vendors & programs

- Make evaluation easy: demos & trials
- Show delivered outcomes
- Keep info consistent everywhere

DATA & METHODOLOGY

Methodology & sources

This report synthesizes the most recent publicly available research on education consumer behavior and decision-making, current as of publication in 2026 — a data-driven analysis and the demand-side companion to our marketing & visibility report.

Data sources

- EAB — AI in the college search (students & parents)
- Spark451 / Jenzabar — College-Bound Student & Parent surveys
- Eduventures / Encoura — student sentiment
- CampusESP & Ruffalo Noel Levitz — prospective family survey
- Similarweb / SparkToro — zero-click search
- College Board — student GenAI use
- K12 Academics directory & visibility analytics

A data-driven analysis & demand-side companion to our marketing & visibility report. Survey definitions & populations vary by source; AI-in-decision metrics are moving quickly; figures reflect the windows cited & are rounded.

Contact K12 Academics

Want to understand or reach today's education consumer? We'd love to hear from you.

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