

2026

Voice of the Online Learner



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Introduction

Each year, we release the *Voice of the Online Learner* as part of our commitment to helping universities best serve online students.

Now in its 15th year, *Voice of the Online Learner* surveys prospective, enrolled, and graduated students of online programs to better understand their needs, motivators, and challenges. These learnings help universities design programs that provide the most value and impact for their students, their local employers, and the broader communities they serve.

While there has been an increased focus on adult learners in recent years, most research in higher education still focuses on the traditional college student.

There are certain themes that we have tracked for many years – students have long sought affordability, flexibility, and career-relevance from their programs.

Over the past couple of years, several newer trends have emerged.

Sources of funding shifted, underscoring the importance of affordability.

Students use a range of sources to fund their degrees, but the mix is shifting with an increased number of students relying on federal grants or private financing through loans, grants, or family.

Learners increasingly focus on local institutions.

A larger number of students live and/or work in the same state as the institution where they're enrolled in online programs, reinforcing the importance of trust, support services, and optional in-person engagement at these institutions.

Students desire more human connection.

Enrolled students are increasingly open to optional, purposeful engagement, either in person, on-campus, or online through synchronous learning opportunities.

What stands out from this year's responses is the rapidly growing impact of AI on the learner journey.

The discovery process for higher education is becoming increasingly digital.

Prospective students lean on a myriad of digital tools, including AI assistance, for faster and more comprehensive independent evaluation. New questions this year shed further light on how the student discovery journey is evolving in real time, and how universities will need to adapt to be considered in a more complex process.

Learners are looking for guidance from universities on how best to use AI tools ethically and efficiently.

The survey started tracking this topic in 2024 and has seen universities make progress on this front. Unfortunately, they aren't moving fast enough to meet learner expectations.

Learners acknowledge that technology will continue to impact their careers and recognize the need for lifelong learning to upskill and reskill.

This awareness translates into increased expectations of participating in future learning across all program types, with a notable uptick in the likelihood of engaging in non-degree programs, as learners view such programs as the most efficient way to gain job-relevant skills.

The 2026 *Voice of the Online Learner* findings point to a modern learner who is increasingly self-directed, digitally fluent, and career-anchored, expecting institutions to deliver flexibility, relevance, and guidance in a world being actively reshaped by AI.

To help universities identify where to focus their innovation efforts, we identified critical areas where university leadership can adapt to best serve these modern learners.

Who we surveyed

We surveyed 4,002 prospective, current, and recently graduated U.S. online learners about their motivations, preferences, and experiences as students of online programs. Survey responses were collected in Dec 2025 and Jan 2026. Qualitative responses (quotes) were collected in Feb 2026.

AVERAGE AGE

Average	38
Undergraduate learners	37
Graduate learners	38
Non-degree certificates	43

GENDER

Male	54%
Female	44%
Other	2%




RACE

White	72%
Black or African American	20%
Hispanic/Latino/Spanish	12%
Asian	4%
American Indian or Alaskan Native	3%
Middle Eastern or North African	1%
Preferred not to say	3%

ANNUAL HOUSEHOLD INCOME

Earn less than \$100K	57%
Earn more than \$100K	38%
Preferred not to say	5%



-  **50%** currently enrolled in an online program
-  **25%** currently looking for and have firm plans to enroll in an online program in the next 12 months
-  **25%** graduated from an online program within the last 12 months

Key findings

As workforce demands shift due to more widespread use of Gen AI, learner behaviors and expectations are also shifting.

Learners discover and explore prospective programs with more digital tools, including AI assistance.

Prospective students are using many more sources of information — including AI — to look for and learn about online programs. This shift reflects a desire for a faster and more independent discovery and consideration process.

Learners no longer hope for guidance around Gen AI — they expect it.

Recognizing that AI will affect their working experience and professional industries, students are seeking academic and ethical guidance around its use. Universities, while making improvement in this area, are not keeping up with student needs.

Learners are increasingly considering future educational opportunities to upskill and reskill over the course of their careers.

As emerging areas like AI and data continue to change, learners are increasingly expecting to need additional education over the course of their careers and see non-degree programs as an effective way to quickly build job-relevant skills. They're also showing increased likelihood of participating in future degree programs, both online and offline.



Over the course of this survey, several themes have remained central.

Career advancement is the primary motivator.

Online learners are hard-working and determined to advance professionally.

Affordability is the top decision factor.

Even as funding sources shift slightly year-over-year, affordability remains the top decision factor.

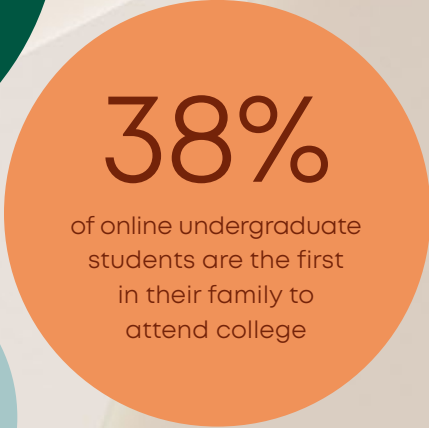
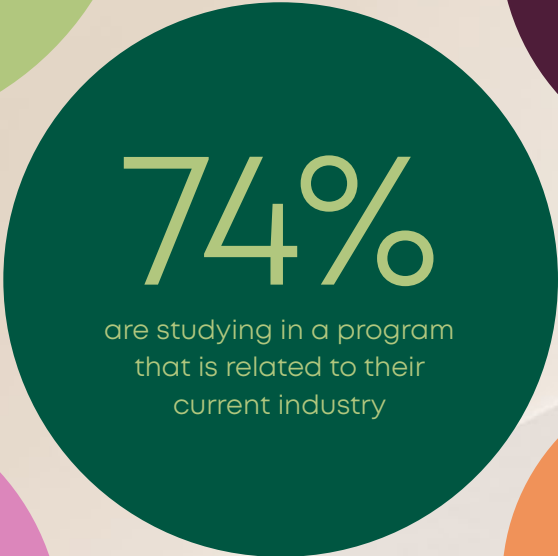
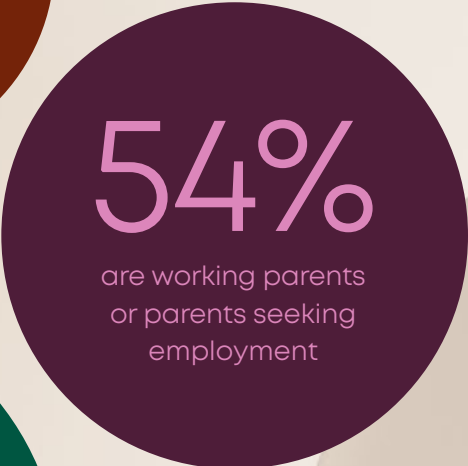
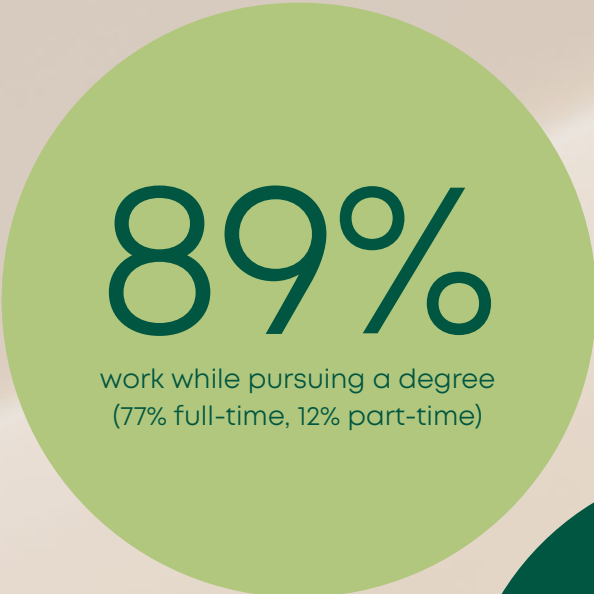
Learners choose modality and locality.

After modality — many learners will not enroll if their desired program is not available online — program choice is reinforced by geographic proximity. Most learners choose institutions close to home, even though they prefer to learn online, underscoring the trust learners place in regional institutions and their increasing openness to opportunities for in-person connection.

Flexibility is non-negotiable, but desire for connection is rising.

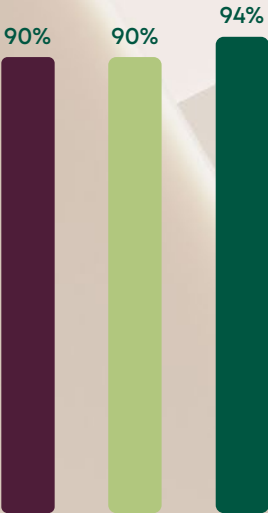
Online learners expect programs to fit seamlessly into their lives, enabling them to balance education with work, family, and other responsibilities. Because of this, flexibility continues to anchor their choice of programs, even as the desire for optional and purposeful human connection rises.

Who are online learners?



Consistent with prior years, modern learners are working adults who are determined to advance in their careers while also juggling professional and personal responsibilities.

Respondents now nearly universally believe in the quality and value of online degree programs:



Believe that the quality of an online degree is comparable to or better than an on-campus degree



Believe that employers value an online degree from an accredited institution the same as or more than an on-campus degree

● 2024 ● 2025 ● 2026

AI-related findings

Rapid, significant technological change through the recent widespread adoption and continuing evolution of Gen AI has caused learners' behavior to change at nearly every step of the student journey, including their discovery of institutions, expectations for online programs, and expected participation in continued learning in the future.

Discovery is becoming more digital, and more AI-assisted

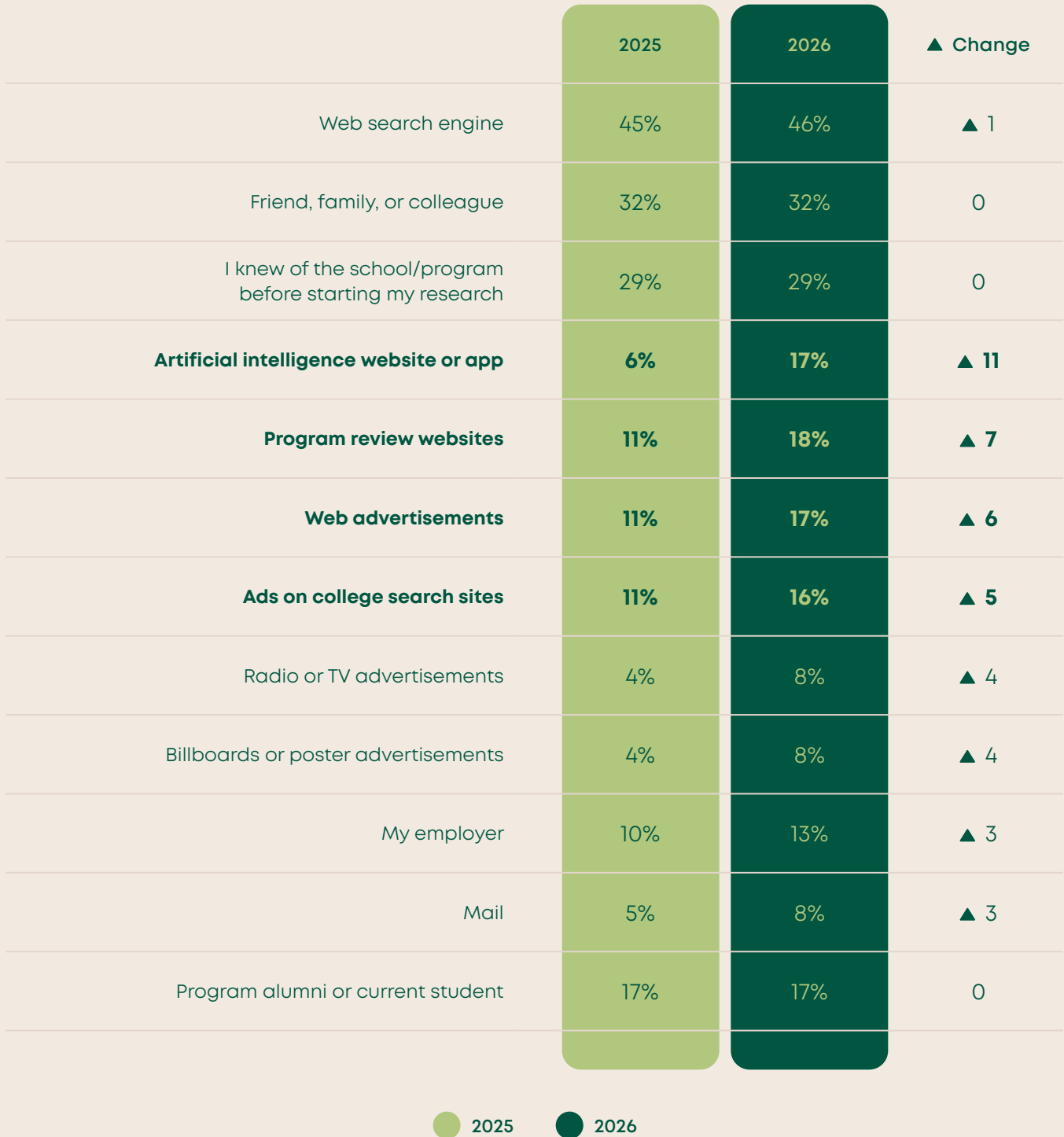
As AI reshapes how learners work and learn, program discovery is becoming more complex, with students using many more sources of information, including increasingly AI-assisted digital channels. This reflects demand for speed, independence, and convenience.

The channels students historically used to learn about programs, such as search engines and word of mouth, have not changed much year over year. Meanwhile, digital channels (program review websites, web ads, AI websites/apps, ads on college search sites) showed upticks of 5 percentage points or more in student usage during the discovery process.

Particularly notable is the increase in use of AI from 6% in 2025 to 17% in 2026.

How did you learn about the schools you researched or considered?

AI and self-directed research are reshaping how students discover programs.



This year, new questions focused on the methods that students use later in their decision-making process. Students were asked about both the channels that they used and their relative importance to better understand learners' program discovery process and preferences.

The channels that prospective students use most often are also the ones that they value the most, with 75% of respondents most valuing self-service tools.

Interestingly, all channels had higher importance measures than usage measures, an indication that learners want a wide variety of options available to them to meet their needs in any given situation.

Learners no longer follow a single path. Instead, they assemble confidence by triangulating across digital channels, AI tools, and, when it matters most, human guidance. As the student discovery process becomes more intricate, it will be difficult for universities to manage visibility within each stage of the journey.

How did you learn about the schools you researched or considered?

	How they researched	Top 2 Box Importance
Self-service (finding answers on your own through website or other sources without contacting a representative)	57%	75%
Email	47%	71%
Phone	39%	63%
Social media (e.g., official university Instagram, LinkedIn, Facebook)	33%	42%
Chat on the website (with a person or AI)	26%	46%
Text / SMS	20%	47%
Video chat (e.g., Zoom)	16%	42%

(Base size: 4,002n)

“I spoke with admissions representatives and reviewed online forums and student feedback to better understand the experience and outcomes. I used AI tools to help compare programs, summarize key differences, and identify strengths and weaknesses based on my goals. This helped me make a more informed decision and ensured I selected a program that best supported my professional development.”

Jace, Master of Business Administration,
Human Resource Management Emphasis

Gen AI is a reality, not a future concept

Gen AI has moved from future concern to present reality.

Voice of the Online Learner started asking learners about their perception of AI and its impact on their careers in 2024. Since then, students' forecasts about the impact of AI have grown.

In 2024, 59% of learners expected that an understanding of AI would be essential for workplace success; in 2025, that percentage was 67%, and this year, it grew to 71%.

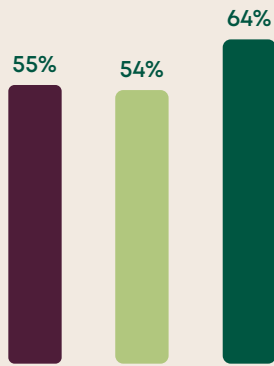
As with last year, more learners indicated expected impacts to their career that were both positive and negative, indicating a heightened awareness of its lasting impacts but continued uncertainty as to what exactly those impacts will be. Regardless of whether learners expect the changes from AI to be to their benefit or detriment, they widely believe AI will affect their careers and increasingly expect institutions to prepare them for its impact in practical, career-relevant ways.



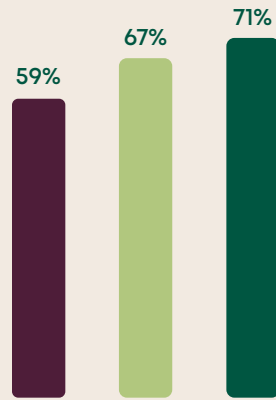
“As an educator and aspiring leader, I want guidance that moves beyond theory and provides structured, real-world applications that support both student achievement and responsible innovation.”

**Laquita, Post-Graduate Education Specialist
in Educational Leadership, Principalship**

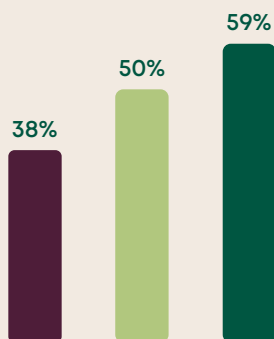
Increasing need to understand Gen AI for workplace success:



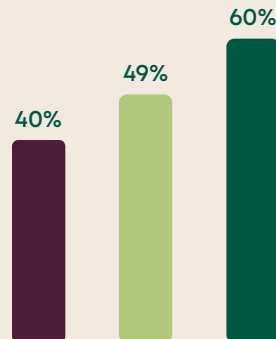
Gen AI is going to create new types of jobs and career paths



Gen AI is important to learn and understand to be successful in the workplace and in the future



Gen AI is going to affect my job positively in the future



Gen AI is going to make my job prospects and growth more challenging in the future

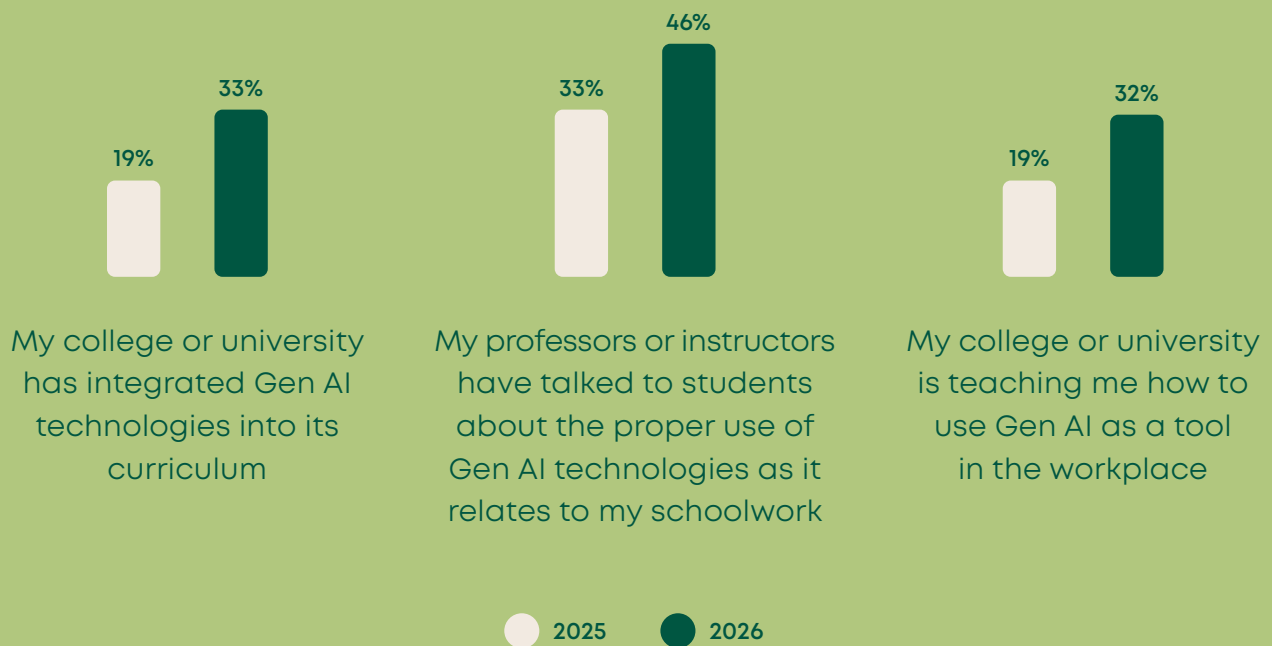
● 2024 ● 2025 ● 2026

As interest in understanding Gen AI reaches a fever pitch, institutions are racing to catch up.

More learners this year (33%) indicated that they experienced Gen AI integration in their programs' curriculum. Nearly half of learners reported that their instructors talk about the proper use of AI technologies in 2026 – this compares with only 33% in 2025. Even with significant gains in the frequency with which universities are providing guidance on new technology, there is still a disparity between what learners are asking for and what they are getting. **University leaders and instructors need to move faster to provide the guidance on AI that students are seeking.**

How often have you had the following experiences with Gen AI technologies in your online program at your college or university?

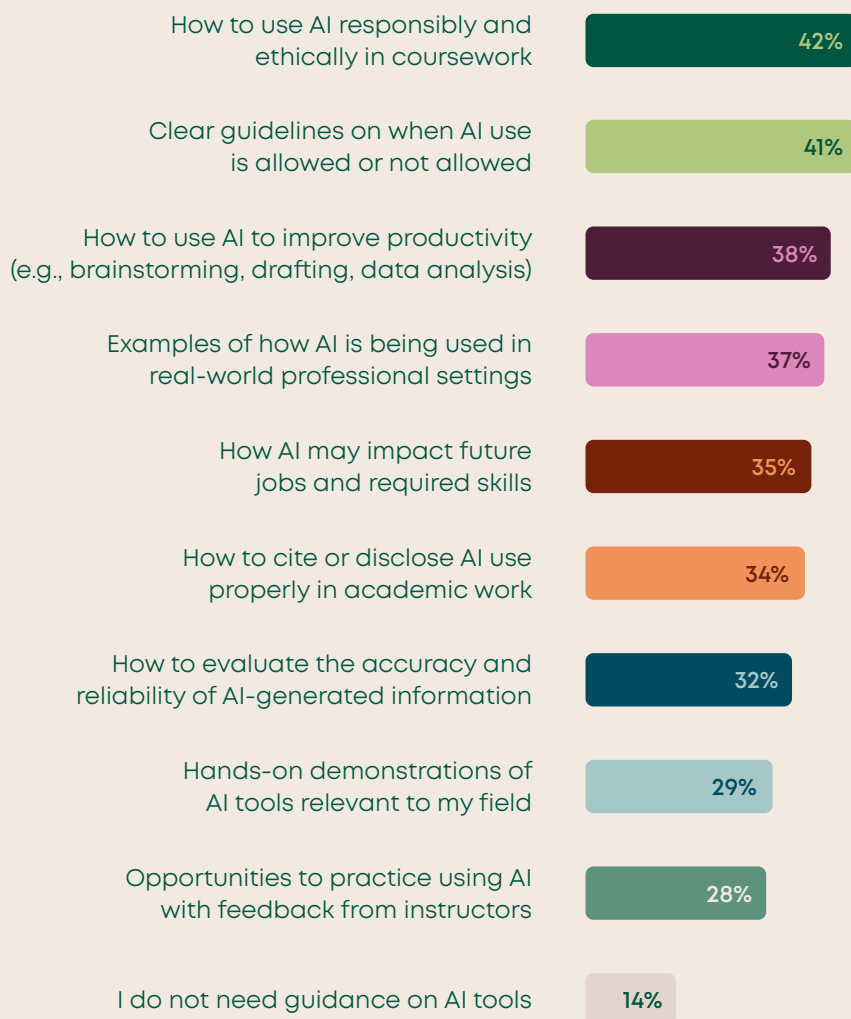
(Percentage who answered Always or Most of the Time)



To further explore this topic, a new question this year asked learners what type of guidance they sought.

Students indicated a wide range in the types of guidance they need, indicating that they are potentially not sure what type of help will ultimately be the most beneficial to them. Slightly edging out the other options, the most frequently cited areas for guidance centered around ethics and responsible use.

What type of guidance do you seek from your university around AI?



Base size: 3,025n



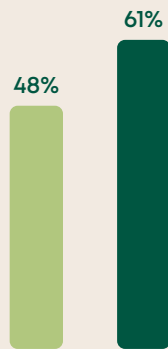
As AI reshapes industries, interest in continued learning is growing

Learners report greater interest than in years past in engaging in future education after finishing their current program, potentially showing that they recognize the growing need for upskilling and reskilling throughout their career to stay relevant in a workforce rapidly shifting due to technology.

Learners indicate greater likelihood to participate in both degree and non-degree programs. Where interest in non-degree credentials is rising, learners are citing it as a faster, targeted way to build skills to help support their career goals.

After finishing your program, how likely are you to:

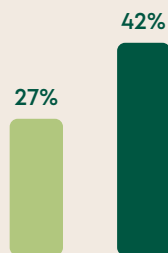
(Percentage indicating they are Somewhat or Extremely Likely)



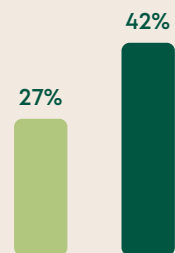
Enroll in an online degree program



Enroll in an online non-degree program (e.g., certificates, bootcamps, micro-credentials)



Enroll in an on-campus degree program



Enroll in an on-campus non-degree program (e.g., certificates, bootcamps, micro-credentials)

● 2025 ● 2026

In an updated section on future learning, students were asked about what types of non-degree programs they would be interested in and for what reasons.

Students' interest in non-degree credentials is most closely linked to further career advancement, driven by a mix of immediate career needs and future skill development in emerging areas like AI and data.

These drivers position non-degree programs as a flexible way for career-minded learners to stay relevant while preparing for rapid technological change, without committing to another full degree.

What type(s) of alternative credentials from non-degree programs are most appealing to you? Select all that apply.

Industry certifications (exam-based licensure or validation) (e.g., PMP, AWS Practitioner, CompTIA A+, SHRM-CP)

52%

Credit-bearing certifications or courses from a college / university (e.g., undergraduate / graduate certificate programs that award college credit)

51%

Industry certificates (e.g., Google Career Certificates, IBM SkillsBuild, Meta Certificates)

48%

Trade or occupational skills certificates (e.g., Medical billing & coding, Pharmacy technician)

39%

Microcredentials / Digital Badges (e.g., Nano-learning badges, Coursera Specializations, edX MicroMasters)

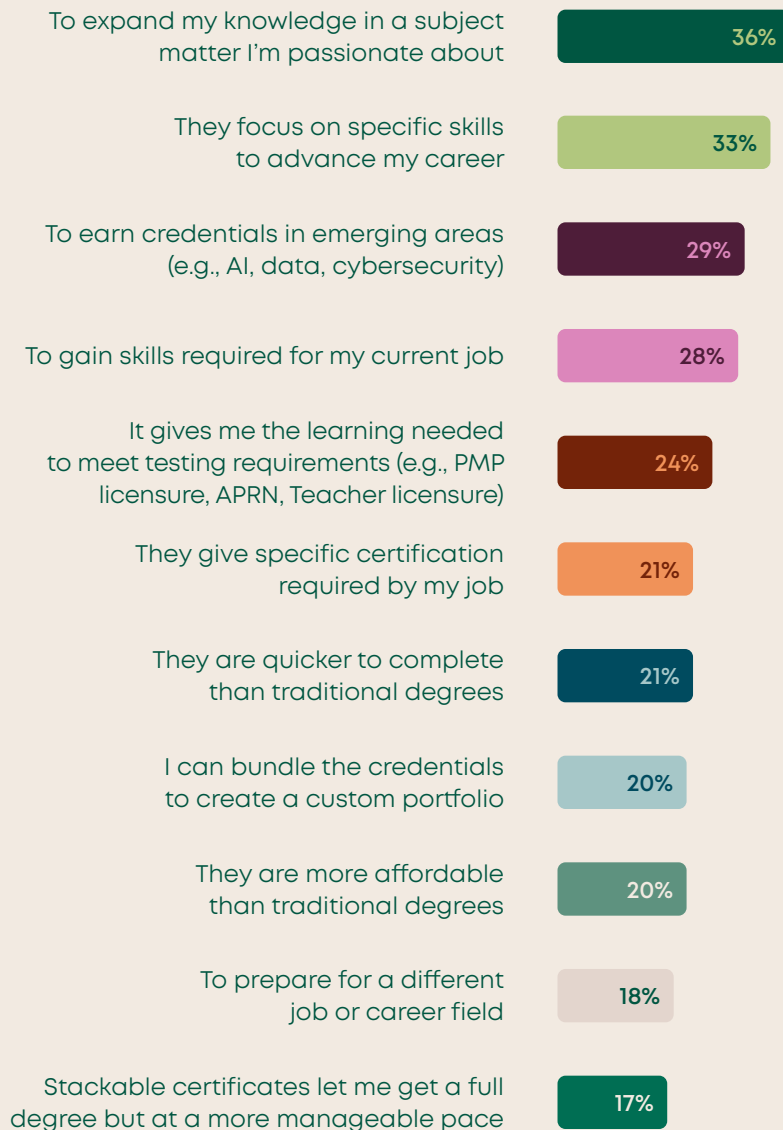
39%

Base size: 2,392n

“Overall, my goal is for the credential to strengthen my resume and support my long-term career growth.”

Zion, Master of Business Administration with a concentration in Forensic Accounting

What are the primary reasons for your level of interest in non-degree programs? Select up to 3.



Base size: 1,943n

Note: This survey question was newly worded, so trended data from 2025 is unavailable.

While interest in non-degree credentials increases, more than half of learners are still worried about employer recognition of these credentials.

Stacking credentials towards a full degree can help bridge the trust gap by linking short-term credentials to long-term value.

52%

believe that non-degree programs are not highly valued by some employers

71%

agree that non-degree programs can help gain job-specific skills quickly

69%

agree that they are helpful for reskilling into a new career field

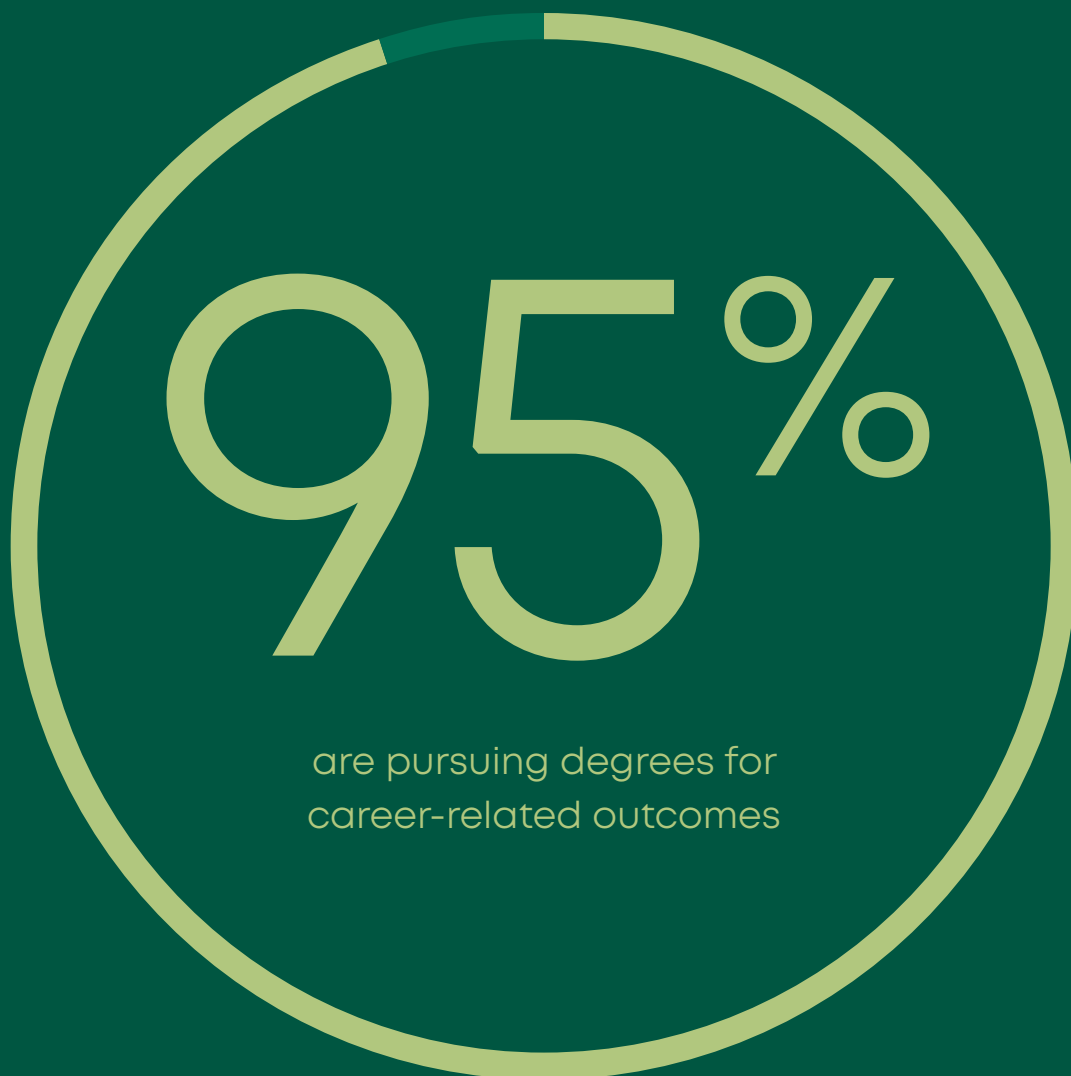
67%

say that non-degree programs would be more appealing if it were clearer how they could lead to a future degree (and 48% say they are not familiar with this concept)

Other central themes

This section focuses on trends that have been tracked since this report's inception.

While some areas have stayed constant, such as the importance of workforce relevance, others have shifted notably over time, such as the desire for human connection.



Career advancement is the primary motivator

Online learners are highly career-motivated, with the vast majority enrolling in online programs to advance within their current roles, increase earnings, or strengthen job-relevant skills. Survey responses are consistent with prior years, reinforcing that online learners are committed to doing the work to progress in their careers and improve their livelihoods for themselves and their families.

Online learning provides the career advancement students are looking for, with 9 out of 10 attributing career growth to their program completion.

91%

of graduates attribute a positive career impact to their online program

86%

of enrolled learners say their program is worth their time

82%

of enrolled learners say their program is worth the cost

Affordability is the top decision factor

Affordability is the top decision factor for online learners and has been for the past 13 years, with **84% of learners citing it as extremely or very important.**

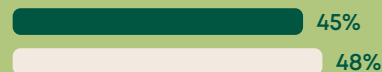
Learners are most cost sensitive early in the decision process, with 87% of prospective students saying affordability is very or extremely important when looking at a program, compared to 82% of enrolled students and 85% of graduated students.

Also consistent with prior years, other top factors include program accreditation (84%), concentrations/specializations (78%), and time to degree completion (72%).

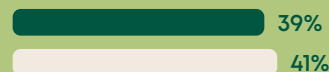
Sources of funding:

Students use a range of sources to fund their degrees. Last year, household savings eclipsed federal loans as the top source of funding. While that breakdown held this year, both categories dipped a bit, with more learners turning to federal grants or private financing through loans, grants, or family.

Household income and/or savings



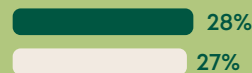
Federal loans



Federal grants



Employer tuition assistance or reimbursement program



Scholarships



Private loans



Private grants



Family



Learners choose modality *and* locality

Learners intentionally choose programs offered online, and modality clearly outweighs institution or program loyalty. Nearly 8 in 10 learners say they would choose not to attend an institution – or would look elsewhere – if their desired program were not available online.

Rather than switching to an on-campus option, most would seek the same or similar program online at another school, further emphasizing the importance of modality in enrollment decisions.

Online students prioritize local institutions for trust, support services, and optional in-person engagement.

8 in 10

chose modality first (online vs. hybrid or in-person)

60%

of students live within 100 miles of the school where they're enrolled or plan to enroll, up from 50% in 2025.

76%

of learners live and/or work in the same state as the school where they are enrolled or plan to enroll, up from 73% in 2025.

Flexibility is non-negotiable, but desire for connection is rising

Flexibility continues to be the dominant reason learners choose online offerings instead of in-person or hybrid programs.

While increasing numbers of students indicate interest in logging in at least once per course, when faced with an either/or question regarding synchronous vs. asynchronous learning, 61% of prospective and 71% of enrolled students picked asynchronous as their preferred format.

Why did you choose to pursue an online degree instead of in-person or in a hybrid format?

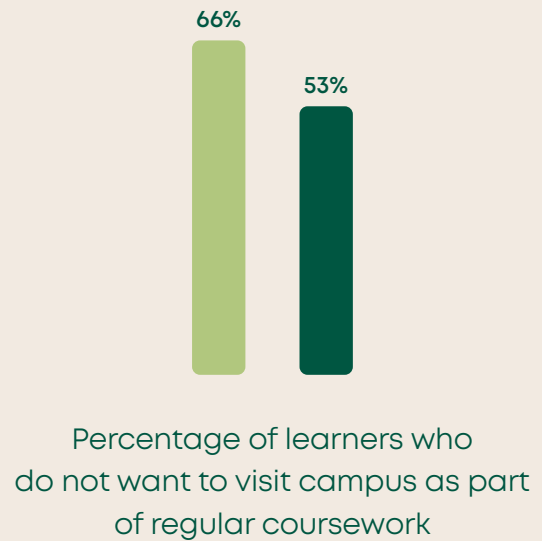
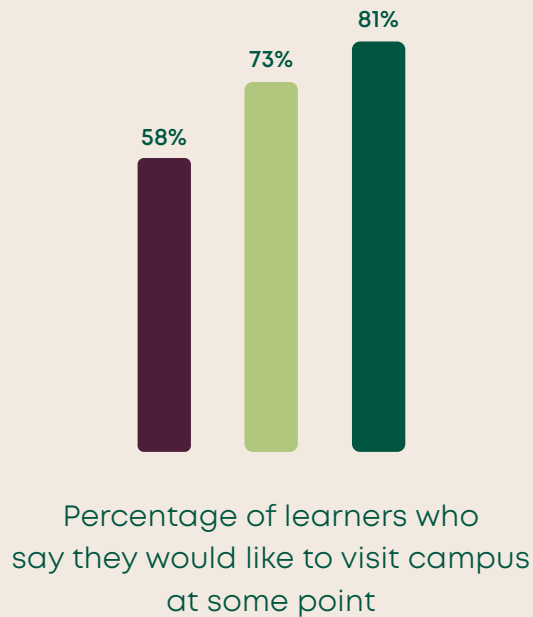


“Flexibility means a lot for my daily life. I need a flexible schedule to help balance my work and school life. Flexibility helped me work full-time and complete my program on time.”

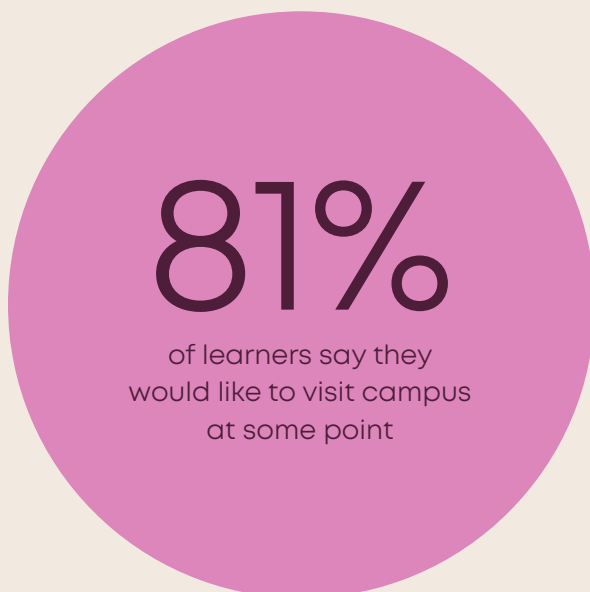
**Emily, Alternative Certification in Special Education
Learning & Behavior Disorders**

Enhanced learning on campus:

In 2025, learners indicated an increased desire for connection beyond the virtual classroom. This year, the percentage of students who are open to visiting campus increased and the share of learners who say they do not want to visit campus as part of regular coursework fell from 66% to 53%.

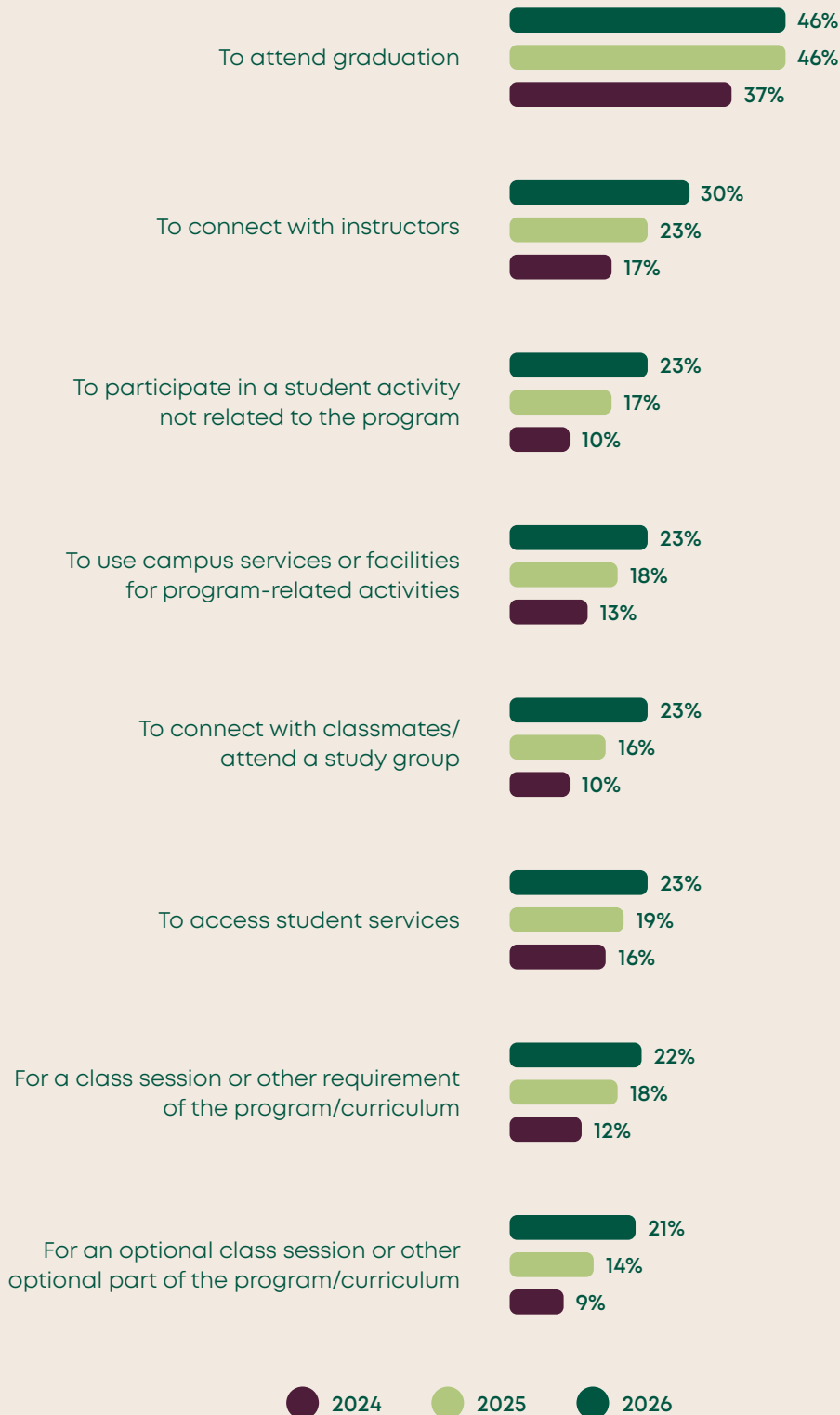


● 2024 ● 2025 ● 2026



Learners are increasingly open to selective, purposeful engagement, including limited synchronous learning and optional on-campus experiences. While 81% of learners say they would like to visit campus at some point – up from 73% in 2025 and 58% in 2024 – these visits are often tied to meaningful milestones such as attending graduation. While most learners still prefer limited campus involvement, openness to occasional coursework-related visits also increased in 2026.

Reasons to visit campus:

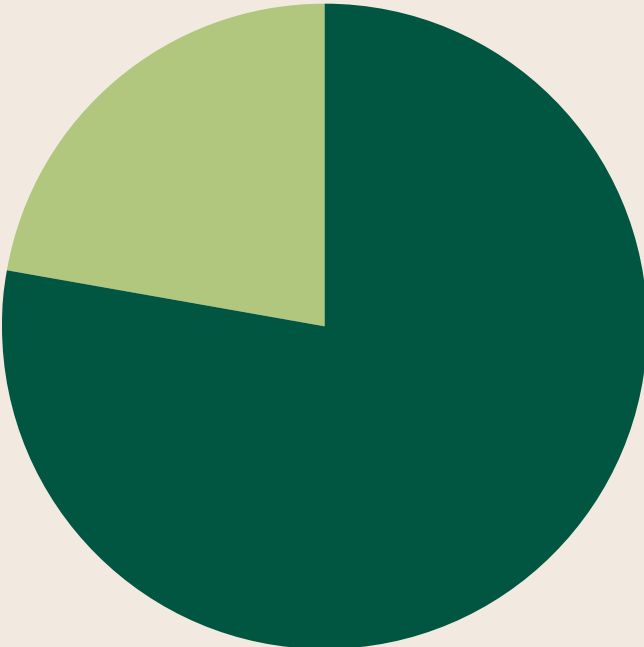


Looking at synchronous learning opportunities, **71% of learners indicated a desire to log in at least once per course**, up from 67% in 2025.

Interest in live connection varies at different stages of the student journey, however. Students indicate a stronger desire for synchronous learning while searching for programs than they do once enrolled, underscoring how important flexibility is for working adults balancing academic requirements with other obligations.

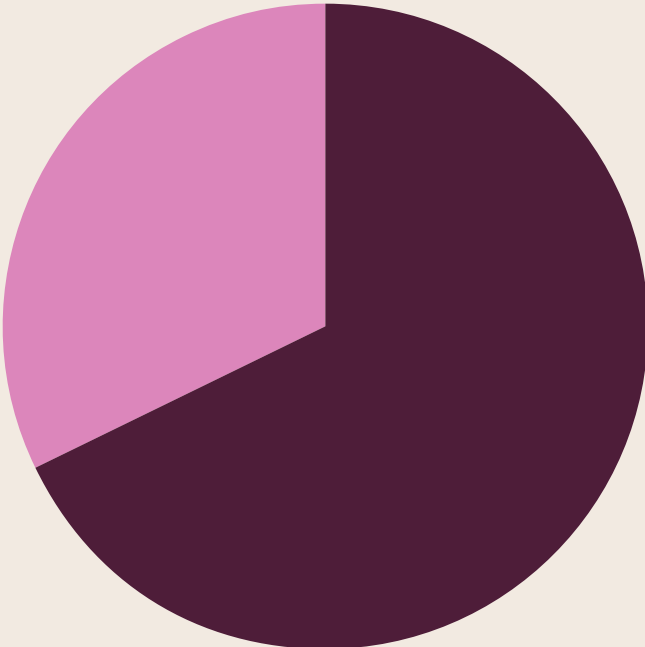
How often would you like to log in at a specific time to join a required discussion or virtual lecture with your instructor and classmates?

PROSPECTIVE STUDENTS:



- 78% At least once per course
- 22% Never

ENROLLED STUDENTS:



- 68% At least once per course
- 32% Never



When asked why they would want to log in for a synchronous session, the top reason was to get questions answered by the professor – the equivalent of “office hours” – followed by a desire to build community and connections with classmates.

These shifts reflect a desire for human contact that enhances learning and belonging without undermining the flexibility and convenience that online programs provide.

As learners lean more strongly on technology, they’re balancing autonomy with a greater desire for live connection where it’s needed the most – most notably, when receiving support and guidance on complex topics.

Retention requires flexibility:

In 2026, 71% of learners report that they completed their programs without interruption. Of the students who needed to leave a previous program, the primary reason was difficulty balancing academic, professional, and personal commitments (28%). This reality further emphasizes that flexibility and support are essential for online learners to succeed.

A new question this year explored how to best support students who are considering stopping out or who have already left online programs. When asked what would most improve their likelihood of completion, learners point to a combination of financial, structural, and relational support.

Top ways to improve the likelihood of completing an online program:

Increased financial aid or scholarships

34%

More flexible scheduling options to work with my work/personal obligations

32%

Career/job guidance

29%

Improved communication with instructors

23%

Opportunities for networking or mentorship

23%

71%

of learners report that they completed their programs without interruption

Takeaways for university leadership

01

Affordability:

Tuition costs and fees are still critical in the decision-making process for prospective students. Institutions should balance the cost of their online programs with value, ensuring enrolled and graduated students feel that the learning is worth the investment.

02

Flexible discovery journeys:

As the student discovery process becomes more complex, institutions should prioritize building more well-rounded nurture strategies. This includes digital discovery tactics, maintaining information across channels, tailoring content to be found by AI search, continuing to use traditional digital marketing tools, and ensuring that human interaction is available when requested.

03

Flexibility:

Learners choose online for flexibility and convenience — without it, students are more likely to stop out of programs. University leadership should prioritize flexible programming when designing programs, so students can more easily juggle school, work, and personal obligations.

04

Purpose-driven connection:

Provide more opportunities for students to connect with each other, instructors, and campus communities. These opportunities — both virtual and in-person — should be related to their program and enhance the learning experience but need to be optional.

05

Guidance around Gen AI:

Universities need to include clear ethical guidance and real-world application for Gen AI in curriculum. Programs that don't offer this guidance are behind and aren't providing the level of preparation that today's learners expect.

06

Upskilling in the age of AI:

Consider short, non-degree programs for workforce-relevant upskilling, particularly when a focus on AI technologies is included. As learner awareness and employer recognition of stackable credentials grows, students increasingly recognize these offerings as fast and trustworthy methods of achieving their career goals.

Conclusion

For the past 15 years, online students have shared what matters most to them — affordability, flexibility, and career advancement. These factors are essential to foster success for the determined, incredibly busy, working adults who pursue online learning.

Yet change is also a constant. As AI rapidly impacts their lives and careers, students are expecting to leverage new technology in all areas of their educational journeys.

This mindset shift starts at the very beginning of the student journey with program discovery. Prospective students are leveraging a wide mix of methods, including digital tools and human connection if necessary, to increase autonomy in their exploration process. Modern learners want to decide which tools are most helpful for their own journeys and will rely on as many channels as necessary.

Students increasingly expect institutions to provide guidance on AI as it relates to career relevance and ethical standards. These expectations have grown in 2026, as learners overwhelmingly acknowledge that understanding AI is essential for successful career advancement — the single most important motivator for these students.

The need to learn about technology's impact on the professional landscape doesn't stop at degree completion. Students are eager for lifelong learning to maintain marketability, especially as technology continues to change.

This expectation presents opportunities for universities to lean into building a constellation of programs for students who may become “repeat customers” over time, through both degrees and non-degree offerings. It's essential that non-degree programs provide practical learning that learners can apply to their jobs right away.

Outside of AI-informed shifts, institutions should also be mindful of a significant change in online learners' desire for connection, both in person and virtually. While such opportunities should not compromise the flexibility that online learners prize, they should be thoughtfully woven through the experience. In particular, students are looking for opportunities to get academic support from faculty and to increase their sense of belonging with other students.

In addition, institutions can be encouraged that online students continue to value their local educational providers. Upticks in the percentage of students who live within 100 miles of their chosen institution, as well as those who live and/or work in the same state as their institution underscore the critical role that regional colleges and universities play in their communities. When programs are designed to meet their needs, learners will opt for the local program over the faraway one. With takeaways from this report in hand, university leaders can continue to evolve to meet those needs.

Methodology

Risepoint collected survey responses from n=4,002 individuals across the United States. All respondents were at least 18 years old and were either:

- Recently graduated (within the past 12 months),
- Currently enrolled, or
- Planning to enroll (within the next 12 months)

in a fully online undergraduate or graduate degree or certificate program.

Half of the respondents (n=2,001) came from an internal sample of prospective, current, and recently graduated students at Risepoint-supported institutions. The other half (n=2,001) were drawn from a nationally representative external panel.

The sample composition was stratified to include:

- **50% currently enrolled** online students,
- **25% prospective** online students, and
- **25% recent graduates** of fully online programs.

To address oversampling of younger individuals, age-based weighting was applied to the data. These weights were informed by past years' surveys and aligned with national demographic benchmarks for fully online institutions, as reported by the Integrated Postsecondary Education Data System (IPEDS).

In addition, the data was weighted to reflect an approximate 60% share of graduate students, consistent with previous years of research. To get more in-depth qualitative feedback on selected topics, a follow-up survey was sent to a random selection of 500 respondents to the full survey.

SAMPLING AND RECRUITMENT

For the external sample, individuals from a national panel of prospective, current, and recently graduated students in online higher education were invited to participate. Participants qualified if they had enrolled in, graduated from, or planned to enroll in a fully online degree or certificate program.

For the internal sample, invitations were sent to individuals who had previously engaged with Risepoint-supported institutions — such as requesting information, applying, enrolling, or graduating. The same qualification criteria applied.

In Fall 2024, 5.19 million students in the U.S. were enrolled exclusively in distance education courses¹. Based on this population estimate, a sample size of 4,002 yields a margin of sampling error of approximately $\pm 1.6\%$ at a 95% confidence level.

References

(1) National Center for Education Statistics-Integrated Postsecondary Education Data System, Fall 2024 Enrollment

TECHNICAL NOTES:

- Percentages in this report have been rounded; totals may not sum to exactly 100%.
- Where applicable, totals exceeding 100% reflect multiple response options.
- All questions were answered by the full sample (n=4,002) unless otherwise noted.

LIMITATIONS:

As with all self-reported survey data, results are subject to certain limitations. We rely on respondents to answer questions honestly and accurately. Findings reflect a snapshot in time and are subject to individual interpretation of survey questions. In addition, the study only reflects the views of those who chose to participate.



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