2024

Voice of the Online Learner

Insights from Australia

Risepoint

Contents

Dear University Leaders,

It is my pleasure to introduce Risepoint's Voice of the Online Learner report for 2024. Building on expertise from 13 US editions, for the first time we draw insights from Australia's largest survey dedicated to adult learners enrolled—or intending to enrol—in online degree or certificate programs.

The voices of online learners are often overshadowed by traditional educational narratives; yet, these learners represent a significant and growing segment of Australia's higher education ecosystem. They are diverse, motivated and deeply impacted by the opportunities presented by the online medium. We are honoured to give a platform to their experiences, as they navigate pathways vital to the future of our workforce and society.

The data shows resounding positivity among online learners about their educational experiences. Flexibility, balance and convenience consistently emerge as the top reasons students prefer online programs over on-campus or hybrid options. Career outcomes remain a driving motivator. **Remarkably, 96% of online graduates report achieving a tangible benefit attributable to their degree, such as salary increases or enhanced skill sets.**

Affordability is a critical theme. For lifelong learners, particularly those aged 25–44, the intersection of affordability and career progression is driving growing demand for non-traditional degree alternatives. Our findings reveal that **73% of respondents are open to pursuing these alternative pathways:**

56% **would value a no-obligation short course experience** as a low-commitment entry point before pursuing a full postgraduate program.

46% **indicate strong interest in affordable, university-issued professional certificates** that offer credit towards postgraduate qualifications.

42% **believe they can achieve career advancement** with a four-subject graduate certificate.

The rapid adoption of generative AI is a prominent trend in the data. **69% of respondents report using generative AI in their learning, while only 14% of their universities frequently provide practical guidance on its use.** This gap presents an opportunity for higher education institutions to engage more deeply with AI and align their support.

We trust that this report will provide valuable insights into the landscape of online education and serve as a strategic tool for institutions looking to enhance their offerings to meet the needs of today's learners.

Yours sincerely,

Terry Burkitt
VP, Education Services, APAC

Introduction

Welcome to Risepoint's Voice of the Online Learner for Australia. This report reflects our commitment to bring our expertise to guide the success of online programs for the universities we serve.

The findings are divided into **four sections to help university leaders better understand the evolution of online learning:**

01
Perspectives defining the online learning experience
Online learning meets students where they are.

02
Removing barriers to online education
Affordable, flexible offers are the top priority for students.

03
Financial realities: Balancing costs and opportunities
Career ROI matters.

04
Shaping tomorrow's learning environment
Non-degree options have entered the mainstream.

A thorough understanding of the current and future landscape of online learning is crucial for universities to tailor their offerings and capitalise on this rapidly expanding educational market.

01

Perspectives defining the online learning experience

Our survey of Australia's online learners identified five key perspectives:

- **Nearly all** online learning provides tangible career benefits and outcomes.

- **Learners' desire to achieve career goals is a strong motivator** for online enrolments.

- **Flexibility, balance and convenience** matter for online learners.

- **Online degrees compare favourably** to traditional degrees.

- Online learning presents **challenges as well as benefits.**

Online education is meeting students where they are— geographically, financially and professionally. Flexibility is no longer optional; it's essential.

Each of these perspectives has important implications for universities and their online program offerings.

Online learning provides tangible career benefits and outcomes

Significantly, **96% of graduated online learners reported achieving a tangible career benefit or outcome** attributable to their degree, such as salary increases or enhanced skill sets.

Which of the following occurred during your program and can be attributed to your earning this degree or certificate? (Select all that apply.) Sample size n=527.

Category	Percentage
Have more marketable skills and/or certifications	23%
Increased confidence in the workplace	23%
Started my career	18%
Got a new job	17%
Salary increase	17%
Switched my career	14%
Promotion at work	13%
Met employer / industry requirements	12%
None of the above	4%
Other (please specify)	2%
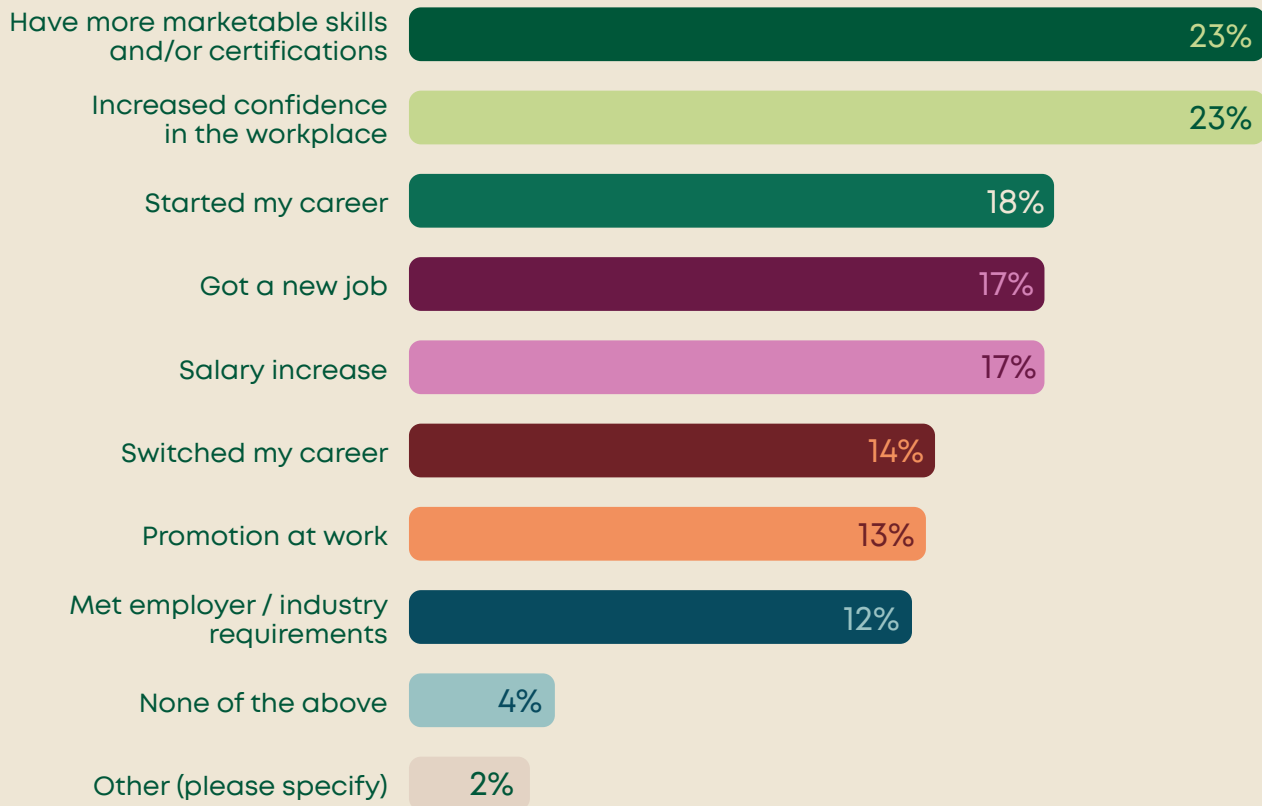
> "Online study has enabled me to further my education and develop my professional career at the same time. If I had to study on campus, I simply would not be able to work full-time and keep my other commitments."

Eliza, Master of Public Health

Key considerations

The alignment of online offerings with emerging workforce needs is critical to learners' decision making.

Learners' desire to achieve career goals is a strong motivator for online enrolments.

76% of respondents either agreed or strongly agreed with the following statement:

The degree that I earn online is very important in helping me achieve my career goals.

29% Strongly Agree

17% Neutral

47% Agree
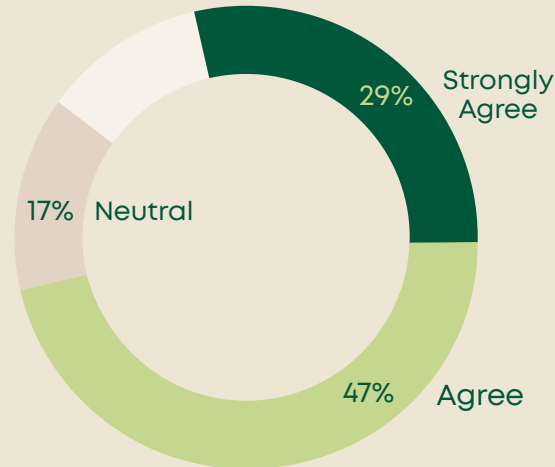
66% believe that there is a need to get additional credentials beyond a bachelor's degree to improve career prospects.

A bachelor's degree is now expected by most employers, and I need to get more credentials to improve my career prospects.

24% Strongly Agree

23% Neutral

42% Agree
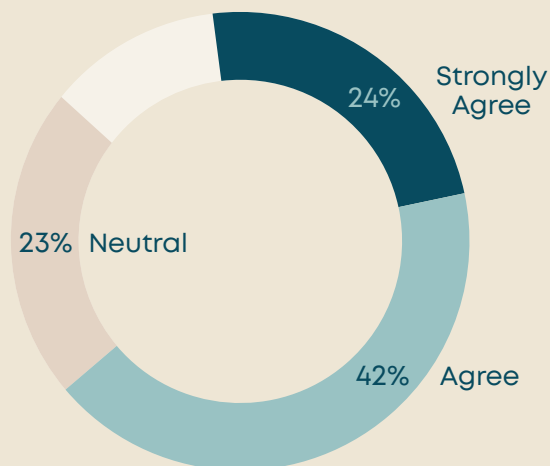
This career motivator is reflected in online learners' generally favourable attitudes toward program costs. **66% of respondents either agreed or strongly agreed that their course cost is a worthwhile investment.**

My online program is worth the cost.

21% Strongly Agree

29% Neutral

45% Agree
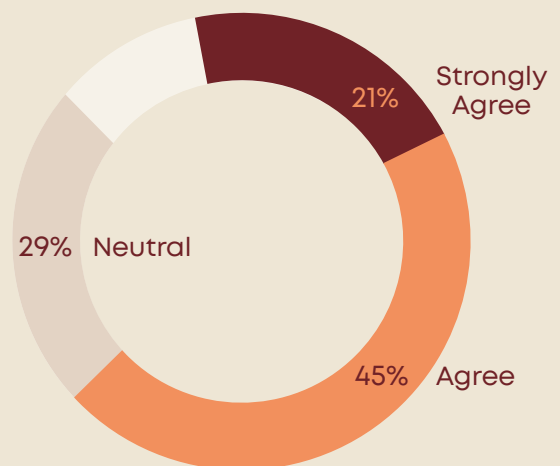
Flexibility, balance and convenience matter for online learners

Students' top three reasons for choosing to pursue an online program instead of on-campus or hybrid programs centred around flexibility, balance and convenience.
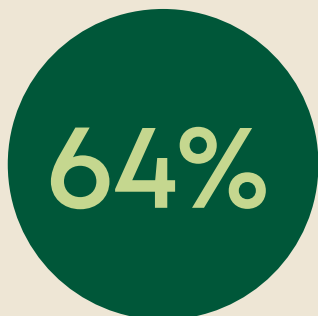
64% of online learners want the **flexibility to take classes from whichever program** they want.

60% chose online learning to help them better **balance their study with their work and personal lives.**
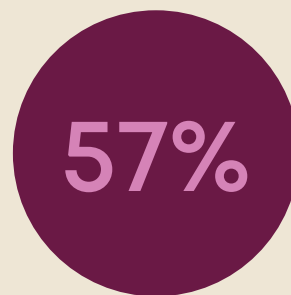
57% want the convenience of **taking classes whenever they want.**

In short, "anywhere, anytime learning" is a key motivator for students to choose online programs.

" I spend a lot of time on my phone when I'm trying to resettle my baby at 2 o'clock in the morning, and instead of scrolling Instagram, I can and do read my course notes, read the assigned readings, I can look at the assessments that I've got coming up. "

Elise, Graduate Certificate in Business Analytics

Online degrees compare favourably to traditional degrees

80%

of students surveyed felt the quality of an online degree from an accredited university is **comparable or better** than a traditional in-person degree.

78%

also believed **employers value an online degree** the same or more than an in-person degree.

US perspective

"Institutions are quickly aligning their strategic priorities to meet online/hybrid student demand. **Approximately 50% of COOs [chief operating officers] confirm that their present strategic plans and resource allocations support a greater emphasis on online and multi-modal learning.** "[1]
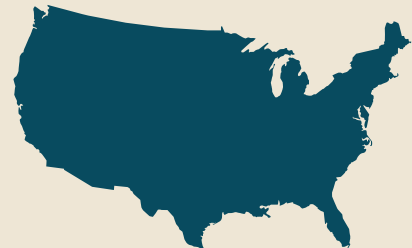
[1]Garrett, R., & Legon, R. (2023). *CHLOE 8: Student demand moves higher ed toward a multi-modal future.* Quality Matters and Eduventures. https://www.qualitymatters.org/qa-resources/resource-center/articles-resources/CHLOE-8-report-2023

Online learning presents challenges as well as benefits

Despite the benefits that make online learning attractive, it does have its challenges. The top two online learning concerns of survey respondents across all age brackets were:

40%
lack of interaction with classmates

37%
lack of interaction with the academics

Students in the 45+ age group are more likely to be worried about the heavy workload, while students aged 18–24 are more likely to have concerns about the online learning format (predominantly, small video clips with accompanying assignments) and the teaching quality.

02

Removing barriers to online education

For many learners, access to higher education is fraught with challenges that can feel insurmountable. Cost, inflexible course structures and other barriers create challenges to individuals seeking professional economic mobility through education. **Universities can play a pivotal role in dismantling these obstacles, ensuring equitable access for all learners.** The findings revealed five key pathways that, when prioritised, can unlock access to transformative educational experiences:

- **Affordability** is the most significant factor.

- For the respondents surveyed, **online learning is the only workable option for most learners.**

- **Accreditation and academics' reputation** are important considerations.

- The availability of additional **university support services can be the difference** in learner decision making.

- There is no "one-size-fits-all" solution—**offering maximum flexibility is paramount.**

Affordable, flexible pathways are now the gold standard in online learning. Universities that unbundle degrees and offer stackable credentials are leading the charge in student success.

Program affordability is the most significant factor

When choosing an online program, **affordability is the dominant factor influencing students' enrolment decisions,** followed by quickest time to completion and accreditation status.

What were/will be the most important factors in your decision to enrol in a program?
(Select all that apply.)

Affordability of fees	61%
Offered quickest path to a degree/Time to complete the program	38%
University/program accreditation	35%

70%
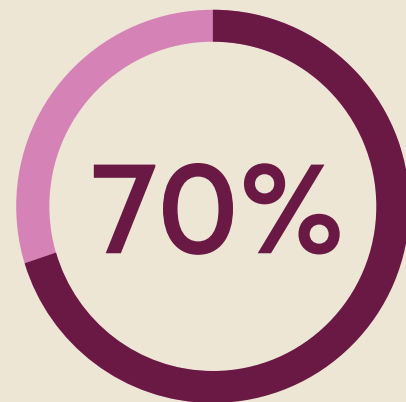
of survey respondents **rated affordability as either very important or extremely important**.

Key considerations

Today's online learners need affordable and flexible programs—such as short-form credentials—at different price points that stack into degree programs with an attractive completion horizon. **Consider strategically unbundling of degree programs to meet students where they are.**

For the respondents surveyed, online learning is the only workable option for most learners

56%
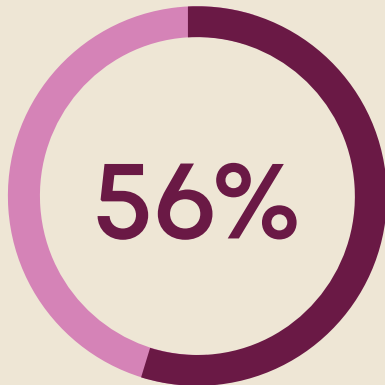
Online learners prioritise modality over institution. If the university doesn't have the degree a student is looking for online, 56% of students will not enrol at that university, even if that program is offered in-person.

Accreditation and academics' reputation are important considerations

70%

of respondents consider **university/program accreditation** to be either very important or extremely important.

63%
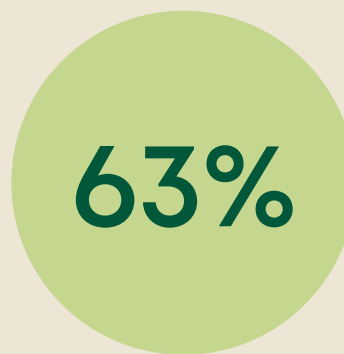
of respondents consider **academics' reputation** at an online learning institution to be either very important or extremely important.

The availability of additional university services can be the difference in learner decision making

4 out of 5 online learners value access to additional university services during their program, such as self-assessment opportunities, job search assistance and technical support.
This is especially true for first-in-family university learners, comprising nearly 40% of overall respondents.

Current/Past online learners: During your program, did you use the following services?
Prospective online learners: Are you considering access to the following services when choosing a university?

Service	Percentage
Self-assessment	32%
Writing centre	31%
Technical support	30%
Working with a career advisor	27%
Mental health counselling services	25%
Resume creation/portfolio building	24%
Writing center/support	23%
Internship assistance/workshops	21%
None of the above	19%
Alumni networking event/alumni associations	16%
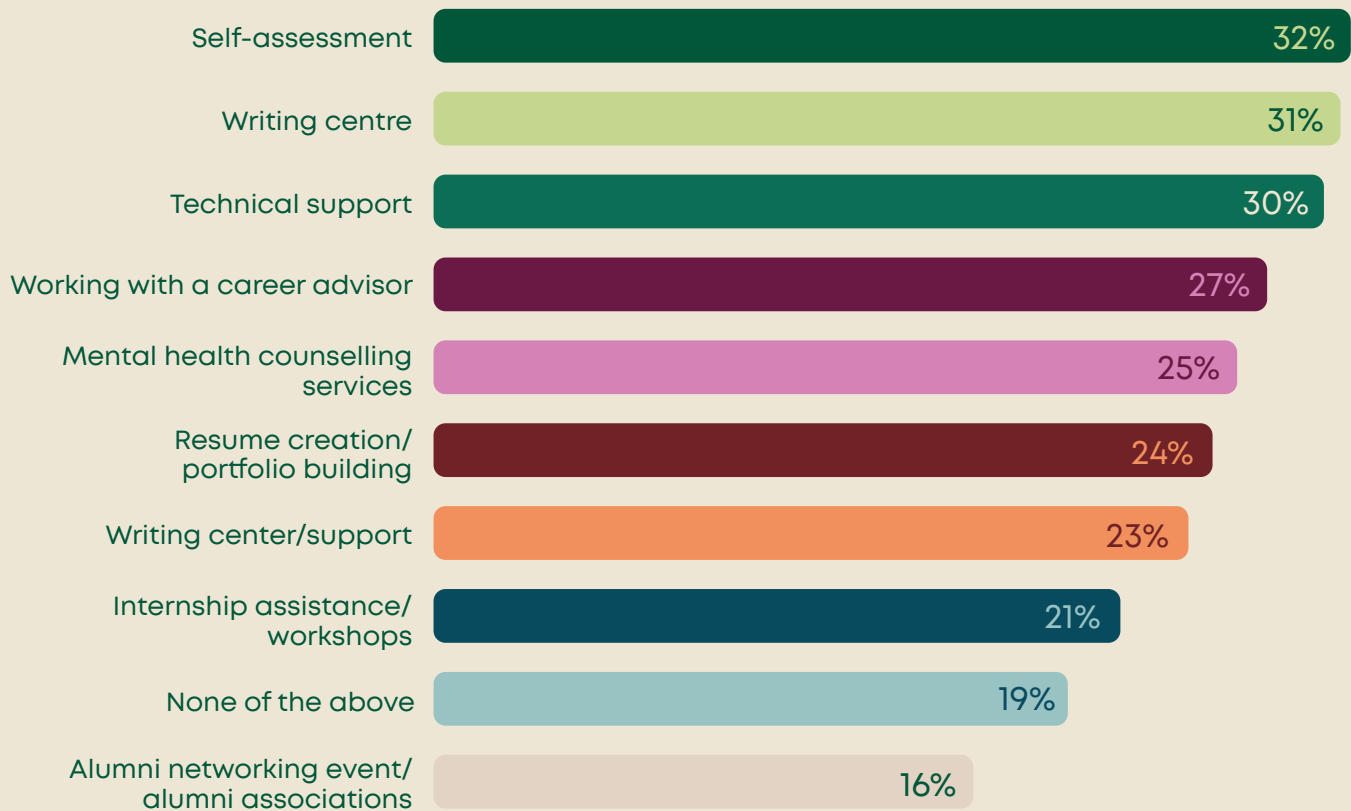
The types of services valued by different age cohorts in the survey revealed some interesting insights, including the following:

Online learners enrolled in postgraduate courses and certificates are more likely than undergraduate online learners to **use or consider using alumni events and associations.**

Online learners aged 34 or younger are far more likely to either **use or consider using university job search assistance (35%)** than learners aged 35+ (21%).

Younger online learners in the 18–24 age group are far more likely to either use or **consider using university mental health/counselling services (32%)** than learners aged 35+ (16%). They are also far more likely to **work with a career advisor (33%),** if they are available, than older learners (18%).

Compared to other age groups, those aged 18–24 are mostly undergraduate students enrolled full-time. They tend to be employed casually, and do not have experience in their industry of study.

Key considerations

Universities that offer a breadth of support services—**such as professional networking, job search and wellness support**—are advantaged to attract online learners.

There is no "one-size-fits-all" solution—offering maximum flexibility is paramount

This section aimed to better understand prospective learners who are still actively considering a program of study.

*What were/will be the most important factors in your decision NOT to enrol in a program? (Select all that apply.)*

Factor	Percentage
Fees were too high	59%
Time to complete was too long	34%
Did not have a concentration or specialisation I wanted	32%

The findings not only reinforce the **importance of affordability** but reveal that **slow speed-to-completion and a lack of specialised offerings are the major obstacles to enrolment.**

In terms of modality, the findings reflect a noticeable shift in demand towards 'anywhere, anytime' self-paced learning.

56% of respondents preferred this asynchronous approach. Significantly though, **76%[2] of students aged 45+ preferred a fully online program,** while **62% of students aged 18–24 preferred a program that had a short (2–7 day) on-campus requirement** over a fully online program.

[2]Risepoint. (2024). *Voice of the Online Learner.* https://risepoint.com/wp-content/uploads/2024/09/VOL-2024.pdf

"With the kids' schedules, I've basically got two evenings and half a weekend day to make it work, so self-paced is the only way for me.**"**

Ayesha, Graduate Certificate in Mental Health

US perspective

" Face-to-face enrolment is stagnant or declining. **Fifty-seven percent of COOs report stagnant enrolment of traditional undergraduates in face-to-face programs,** and another 24% report declining or sharply declining face-to-face numbers. Adult undergraduate and graduate student face-to-face enrolment show even greater declines. **"** [3]

[2]"Garrett, R., & Legon, R. (2023). *CHLOE 8: Student demand moves higher ed toward a multi-modal future.* Quality Matters and Eduventures. https://www.qualitymatters.org/qa-resources/resource-center/articles-resources/CHLOE-8-report-2023

Speed of program completion time is important for online learners, as are the options they have available to complete the program. Survey respondents were evenly split in terms of preferring to take more than one subject at a time to complete a program quicker (53%) versus taking one subject at a time to achieve better life balance (47%).

Online program speed of completion preference:

Take more than one subject at a time so you complete the program faster	53%
Take one subject at time so you have a better university/life balance	47%

However, there were some different preferences when comparing the responses of certain age cohorts. For example, 65% of those aged 18–24, who are predominantly undergraduates, prefer to take more than one subject at a time. **On the other hand, 59% of those aged 35–44 and 65% of those aged 45+ prefer to take one subject at a time. These age cohorts are predominantly graduate/postgraduate and certificate students.**

In terms of subject completion time, survey respondents **prefer completing one subject at a time in an 8-week term (57%)** versus the option to complete two subjects at the same time over 16 weeks (43%).

Online subject speed of completion preference:

Completing one subject at a time in 8-weeks	57%
Completing two subjects at the same time in 16-weeks	43%

Key considerations

Find creative ways to build in **flexibility and options at multiple points** in the prospective learner journey.

03

Financial realities: Balancing costs and opportunities

The financial realities of Australia's cost-of-living crisis are reflected in the findings. Affordability is the most significant factor in learners' decision making. However, the findings also revealed that online learners are carefully balancing online learning costs with its expected benefits and the available opportunities.

Three clear insights emerged on this theme:

- Affordability is paramount, but **the perceived career benefits of online learning programs** can outweigh cost considerations.

- **Certain student cohorts have significantly different financing options** to pay for their online learning fees.

- Both **financial and non-financial incentives** influence learners' decision making.

With cost-of-living pressures rising, learners demand 'career ROI [return on investment]'. Universities offering short-form, lower-cost credentials are becoming critical partners in career progression.

Each of these insights has important implications for universities who can capitalise on opportunities with their online course offerings.

Affordability is paramount, but the perceived career benefits of online learning programs can outweigh cost considerations

The notion of 'career ROI' in learners' decision making is a recurring theme in the findings. **For nearly all respondents, the belief that an online offering would quickly unlock a promotion is the strongest motivator for enrolment.** 92% reacted positively to the following question:

How likely would you be to enrol in one university over another if you were guaranteed to receive $15–20K promotion in your career within 12 months?

Very likely	62%
Somewhat likely	29%
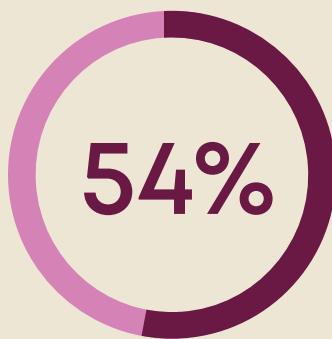
54% **of respondents take a more holistic view of cost and benefit considerations.** For these learners, affordability is secondary to other important value drivers including overall flexibility and the relevance of course content.

Which of the following statements about fees is closest to how you made or will make your most recent enrolment decision?

Fees are higher than some, but convenience, format, schedule and/or location are ideal	32%
Fees for program are higher than some, but the content is what I want	22%
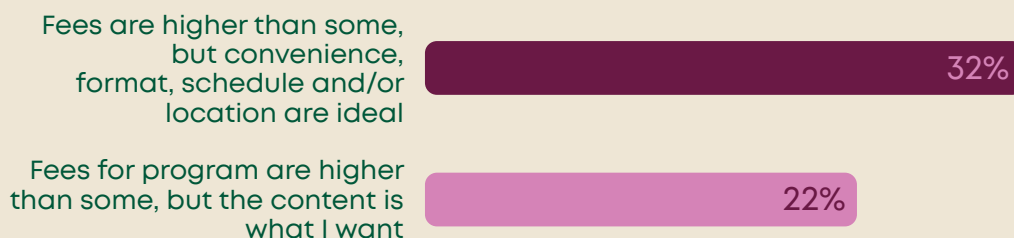
Key considerations

Where affordability levers are constrained, **focus on clearly communicating the 'career ROI' and flexibility benefits of online learning.**

Certain student cohorts have significantly different financing options to pay for their online learning fees

The survey revealed that Commonwealth Supported Places (48%), loans (both government and personal, 41%) and personal income (41%) are the most common ways that online learners pay for program fees.

How do you plan to pay/are you paying/did you pay for your program?

Category	%
Commonwealth Supported	48%
Pay with personal income/funds	41%
FEE-HELP loan	32%
Scholarships	25%
Employer sponsored	10%
Private loans (banks, credit unions or other private lenders)	9%
Other (please specify)	2%
Prefer not to answer	2%
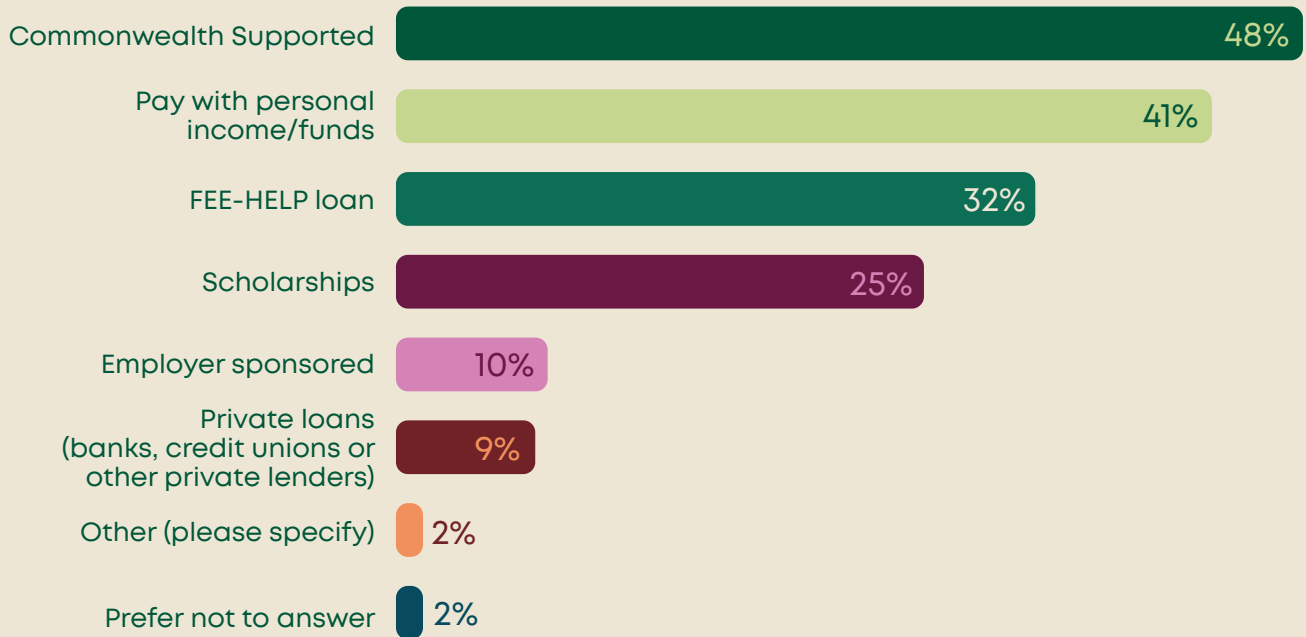
Significantly, most postgraduate and certificate online learners do not have access to CSPs or fee assistance/reimbursement programs from their employers. The majority of CSPs are undergraduate places, and only 22% of postgraduate and certificate online learners responded positively that they had access to the following survey statements:

Fee assistance—fees for an employee's education are paid upfront by the employer or deferred by the educational institution.

Yes, through my employer	10%
Yes, through a partner or parent's employer	12%

Employer reimbursement—employer repays employees for fees or other education costs.

Yes, through my employer	9%
Yes, through a partner or parent's employer	14%

In addition, other roadblocks for students obtaining fee assistance or reimbursement from their employer are stringent eligibility requirements such as attending a specific university and prerequisite lengths of employee service.

Accordingly, **most postgraduate and certificate online learners are more likely to rely on their personal income or private loans to pay for online program costs,** rather than the government or their employers. In contrast, undergraduate online learners are less likely to use their personal income but more likely to use CSPs or loans. **Scholarships are used (or are planned to be used) by 25% of survey respondents, and they are more likely to be available to graduate online learners.**

Key considerations

Postgraduate and certificate online learners are more likely to have to finance their online learning themselves. Universities that can support these learners with lower price points for short-form content—**and by partnering with employers to offer a range of incentives**—will be positioned for success.

Both financial and non-financial incentives have the potential to significantly influence online enrolment decisions

The most favourable financial support that the surveyed students would consider when deciding whether to enrol in an online learning program is a **fee discount.** Significantly, 95% responded positively to the following question:

How likely would fee discounts be/have been in swaying you to choose one program over the other?

Very likely	66%
Somewhat likely	29%
Not at all likely	5%
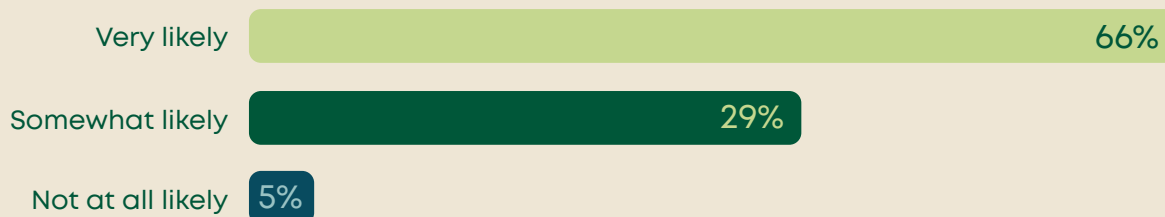
A range of other financial support received similarly positive evaluations, including the availability of the following in the university's online learning program:

91%
Commonwealth Supported Places (CSPs)

88%
FEE-HELP loans

87%
Scholarships

85%
First or last class free

> **"** I've got limited time and resources, so I'm aiming to achieve a pay rise and some new skills through a grad cert with a CSP available. **"**

Lewis, Graduate Certificate in Cyber Forensics

92%
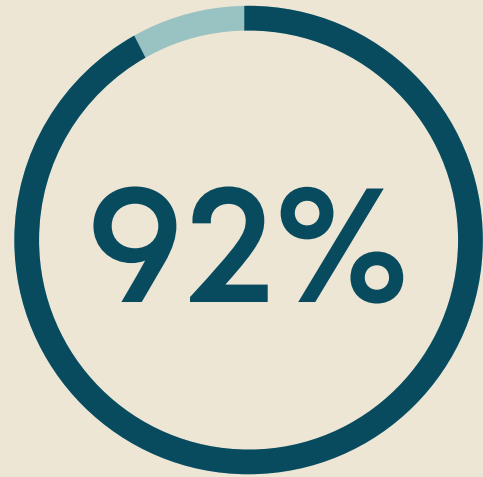
The most influential non-financial incentives that the surveyed students would consider when deciding whether to enrol in an online learning program is **recognition of prior learning/ credit for previous study (92%),** along with **recognition of professional learning in the workplace (also 92%).** Once again, the influence of these non-financial incentives is stronger for those aged 35+, reflecting this demographic's likelihood to have credit for previous study and more professional experience.

04

Shaping tomorrow's learning environment

The online learning landscape is constantly evolving. It is therefore vital for university leaders to **be proactive in maximising emerging opportunities** in the highly competitive university marketplace where there are no geographical constraints.

The survey revealed three key insights to help universities shape tomorrow's learning landscape:

- There is a significant trend towards **lifelong learning.**

- **Short, non-degree alternatives** are becoming mainstream.

- **Generative AI is rapidly impacting education** and the workforce.

Non-degree options are no longer on the fringes—they're mainstream. Upskilling and reskilling for the future workforce is driving demand, and Australian universities must adapt to thrive.

There is a significant trend towards lifelong learning

Online learners want to come back to learn again and top-up their skills. **75% and 51% (respectively) reacted positively** to the following questions:

How likely are you to take part in online learning again?
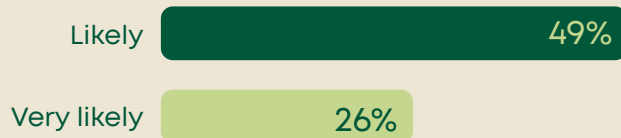
Likely	49%
Very likely	26%

How likely is it that you will go back to university for another degree program, certificate, micro-credential, etc.?

Likely	38%
Very likely	13%
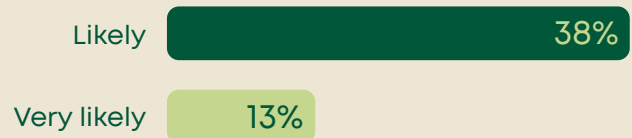
Both returning and new online learners are increasingly open to programs that will help them to:

achieve their
career goals

future-proof their
careers

benefit both
financially and non-financially

They tend to view online learning as an investment in their future rather than a cost right now.

Key considerations

Lifelong learners are highly motivated by career progression and represent an additive revenue stream for universities. **The universities that help lifelong learners with their unmet upskilling and reskilling needs are well-positioned to grow overall enrolments.**

Short, non-degree alternatives are becoming mainstream

Significantly, **73%** of survey respondents are **open to short courses and non-traditional degree alternatives.**

There is strong demand for a range of non-traditional options, including:

34%
industry certifications

28%
higher education credits for subjects completed but no degree completion

25%
non-credit certificates or course options
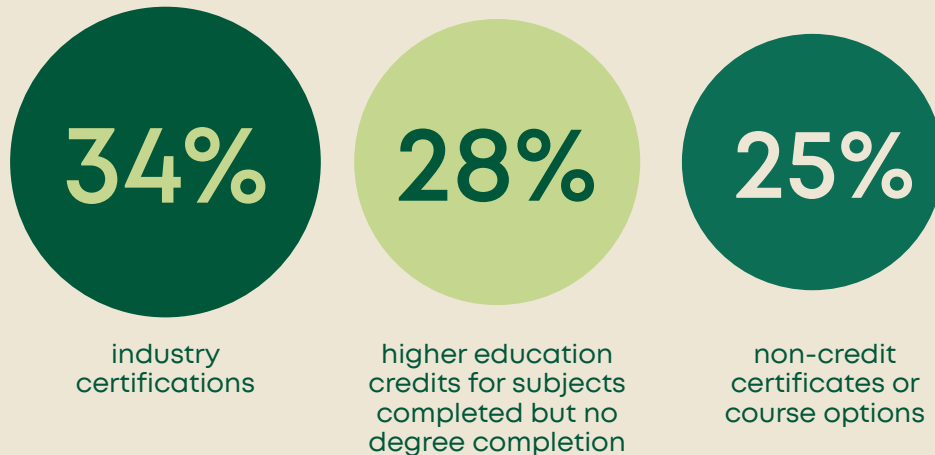
❝ I am thrilled to receive acceptance into the certificate program. This opportunity means a great deal to me, especially considering my professional background and the challenges I have faced. ❞

Hamza, Graduate Certificate in Cybersecurity
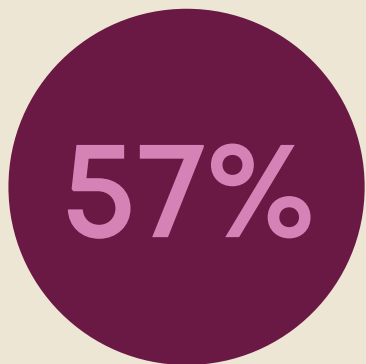
57%
indicated that they would value a **no-obligation short course experience** before committing to a full postgraduate program.

Different age cohorts do have stronger preferences for certain types of non-degree alternatives than others. For example, **learners aged 35–44 are more likely to be interested in both industry certifications and non-credit certificate or course options,** while the 18–24 age cohort are less interested, preferring trade skills certificates instead.

The strongest motivators cited by survey respondents for their interest in non-degree alternatives are the following:

Career advancement, especially among postgraduate and certificate students

More affordable than degree programs

Allow learners to bundle subjects and programs to create custom portfolios

Faster to complete than degree programs

46%
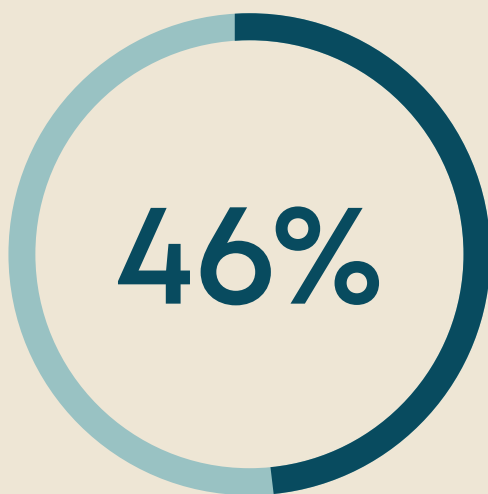
Nearly half of students indicated **strong interest in affordable, university-issued professional certificates** that offer credit towards postgraduate qualifications.

In terms of career benefits, the most compelling reasons cited by respondents for their interest in certificate courses were to:

Either very interested or extremely interested in these outcomes.

62%
get a pay increase or promotion

58%
gain a new career skill

55%
remain competitive in their current career

Completing a certificate program to get a pay increase or promotion:

Very interested	38%
Extremely interested	24%
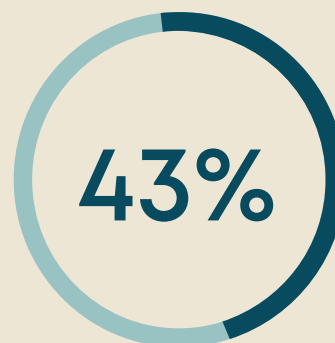
43%
of students either agreed or strongly agreed that they could attain a promotion with a four-subject graduate certificate rather than committing to a full master's degree.

The following responses provide supporting evidence that **career-connected, short-form offerings are becoming mainstream choices** for prospective learners.

38% / 20%	**37%** / 19%	**33%** / 16%	**29%** / 13%
Completing a certificate program to gain a new skill for my career	Completing a certificate program to remain competitive in my current career	Completing multiple certificates over time that would earn me a degree	Completing a certificate or micro-credential program that would lead to my admission to a degree program

● Very interested   ● Extremely interested

40% agree

17% strongly agree

I would value a no-obligation short course experience before committing to a full postgraduate program.

How likely would you be to enrol in one university over another if cheaper, university-issued professional certificates were available that give credit towards a postgraduate qualification with a low-interest government loan?

46% very likely

UK perspective

" A new road system is now required for a much larger group of travellers, as we head towards universal higher education. **What is missing for these new travellers is the system of offramps and onramps, the network of A and B roads that will carry them to a variety of destinations.** This requires a new business model, based on new value propositions, not our immersive high-cost, three-year residential proposition for younger travellers. "[4]

Key considerations

For lifelong learners, particularly those aged 25–44, the intersection of affordability and career progression is driving a growing appetite for non-degree alternatives. Universities that commit to high-quality, online short-form offerings in areas of macro job market need will achieve scale and develop new monetisation pathways.

[4]Venning, E. (2024, August 29). *Down with the world-class university: How our business models damage universal higher education.* Higher Education Policy Institute.

Generative artificial intelligence (AI) is likely to increasingly impact both education and workplaces

The use of generative AI is now pervasive in both educational and workplace contexts. One of the prevailing narratives surrounding AI in higher education is its association with academic misconduct, often described as a "cheating arms race". However, the findings suggest that **most students are leveraging AI as a tool to deepen their understanding of complex concepts or to refine their written work.** In this context, AI offers an opportunity to level the academic playing field, providing learners with accessible support to enhance their educational experience.

69% of surveyed students reported using generative AI in their studies with a diverse range of applications:

Application	Percentage
Understanding difficult concepts	32%
Paraphrasing text	31%
Summarising or synthesising information	30%
Conducting research	30%
Assisting with writing assignments	26%
Organising schedules	20%
Creating study guides or materials	20%
Completing class assignments or homework questions	13%
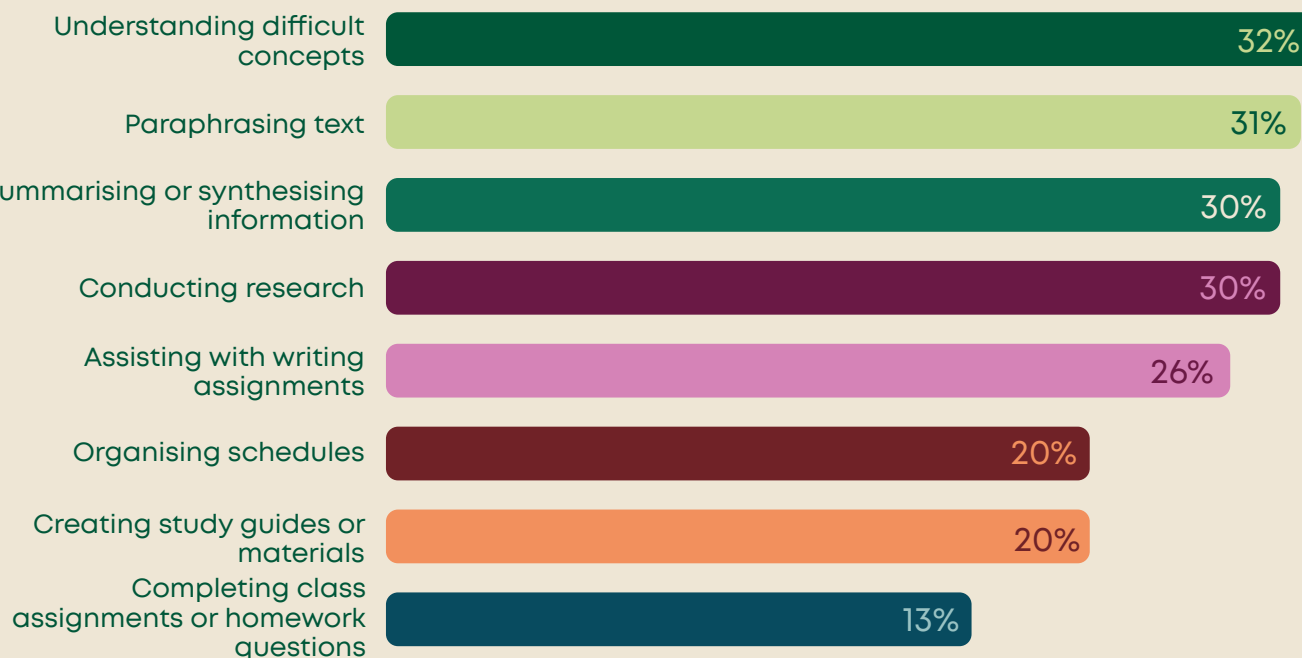
Despite the widespread use of generative AI by students, relatively few report that their universities are consistently encouraging, teaching or using its techniques and tools.

My university has integrated Gen AI technologies into its curriculum.

Never	37%
Rarely	21%
Sometimes	28%
Often	9%
Always	5%
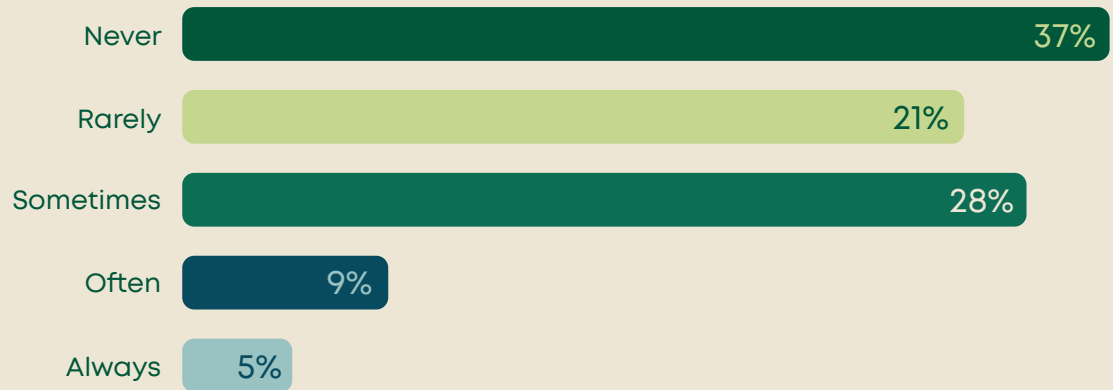
My academics have talked to students about the proper use of Gen AI technologies as it relates to university work.

Never	25%
Rarely	17%
Sometimes	29%
Often	20%
Always	11%
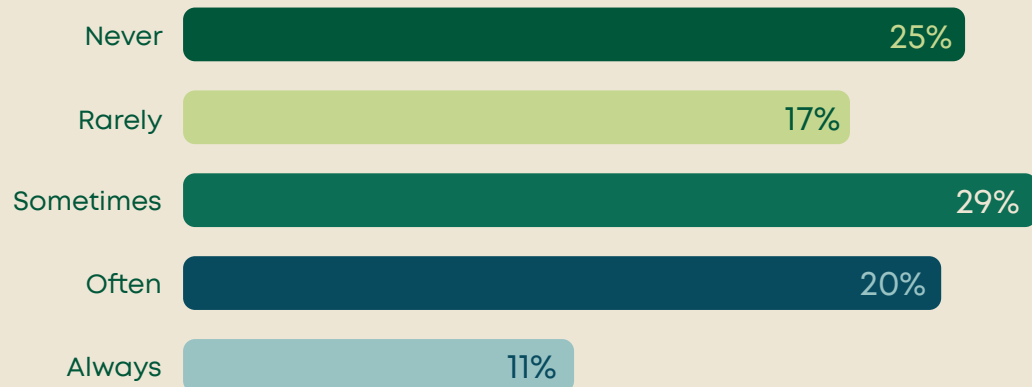
While generative AI is not currently embedded in many online university programs, students believe it will increasingly impact both their future programs and careers:

61%

of respondents believe that **generative AI is important to learn and understand** to be successful in the workplace.

58%

believe that **generative AI is going to create new types of jobs** and career pathways.

Key considerations

The rapid adoption of generative AI technologies among students despite a lack of practical guidance on its use presents an opportunity for universities to **engage more deeply with new technologies and align their support accordingly.**

Conclusion

The findings of this report demonstrate the powerful and evolving role of online education in shaping the future of Australian higher education. **Today's online learners are diverse, career-driven, and seek flexible, affordable pathways to achieve their goals.** Australian universities, armed with these insights, are uniquely positioned to meet the needs of this growing cohort and unlock significant opportunities for the sector.

First and foremost, online learning is defined by its ability to meet students where they are—geographically, financially and professionally. **The data underscores that flexibility and affordability are no longer just attractive features; they are essential.** Students need options that fit their lives, and institutions that offer stackable credentials, short-form courses, and clear paths to degree completion will thrive in this competitive landscape. This strategic unbundling of degree programs can provide learners with multiple entry points, aligning with their immediate workforce needs while maintaining the integrity of the broader educational journey.
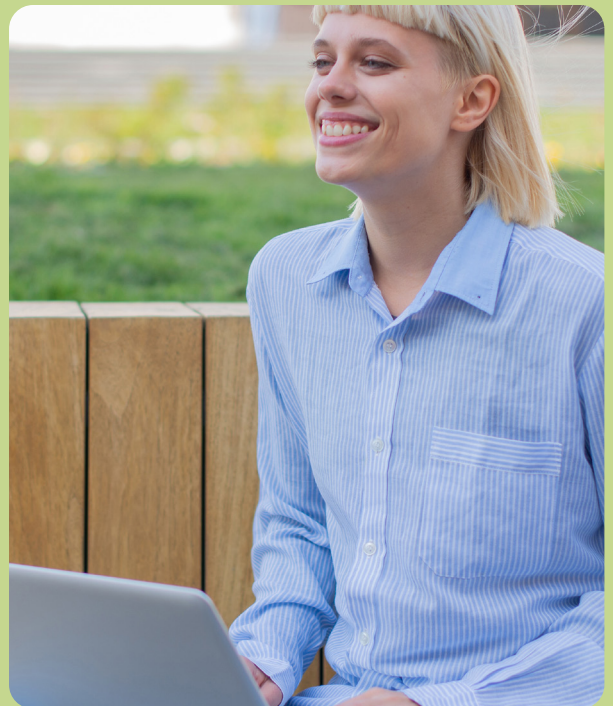
Affordability remains a critical lever in student decision making, especially in the current cost-of-living environment. **Where pricing flexibility is limited, universities must clearly articulate the return on investment (ROI) for career progression that online learning delivers.** Offering lower-cost, short-form credentials or partnering with employers to provide financial support will help institutions attract a broader range of students, particularly lifelong learners and those financing their education independently.

The rise of non-degree options signals a significant shift. **With lifelong learners aged 25–44 driving demand for upskilling and reskilling opportunities, universities that can adapt to this trend by offering high-quality, industry-relevant short-form content will not only serve a critical market need but also create new revenue streams.** The intersection of affordability and career progression is central to this transformation, and institutions that embrace this shift will be well-positioned for long-term success.

The adoption of generative AI technologies by students presents both a challenge and an opportunity for higher education. While most universities have yet to provide regular guidance on AI use, students are already integrating it into their learning. **Institutions that respond by developing thoughtful support and policies around AI will not only keep pace with technological advancements but also enhance the student experience in meaningful ways.**

In summary, Australian universities have a unique opportunity to lead the future of online learning by understanding and responding to the needs of today's learners. By embracing flexibility, affordability, career alignment and technological innovation, institutions can build more inclusive, dynamic and successful online education offerings that will shape the workforce of tomorrow.

Methodology

The study was conducted in June and July of 2024. Risepoint received survey responses from 868 individuals across Australia. Respondents were at least 18 years of age, had a minimum educational credential of a secondary school degree or equivalent, and were recently graduated (within 12 months), currently enrolled, or planned to enroll (within 12 months) in a fully online undergraduate or graduate degree or certificate program. We combined undergraduate and graduate data unless there were noteworthy differences. The sample consisted of 868 respondents comprised of a national external panel of 599 responses and an internal survey of 269 prospective, current, and recently graduated students enrolled at Risepoint client institutions.

To recruit for the external sample, a panel of consumers from across Australia was asked to participate in an online survey through custom email invitations. Invitations were sent randomly across the country to reflect the basic population distribution, targeting persons 18 or older. Panelists were then allowed to participate in the study if they had considered, enrolled, or recently graduated a fully online degree or certificate program. To recruit for the internal sample, a panel of students who had requested information from, applied to, enrolled in, or graduated from two Risepoint client institutions were invited to participate in an online survey through custom email invitations. The same parameters were used to qualify for the survey as the external sample. In 2022, 371,421 higher education students were enrolled in courses offered primarily online, with little to no requirements to attend in person.[1] Based on these findings, a sample of 868 represents an approximate sampling error of +/-3.3% at a 95% confidence level.

Technical notes: All percentages in this report have been rounded. Therefore, the total percent figure in a table may not add up to exactly 100. Further, if the total percentage is substantially more than 100, it is because the question allowed respondents to choose more than one option. All questions were answered by the full sample of 868 respondents unless noted otherwise.

Limitations: As is the case for any self-reported survey data, our analyses are subject to some limitations. The underlying assumption is that individual respondents are answering questions honestly, appropriately and accurately. Our data is a snapshot of the time when the responses were received, and responses are subject to respondent interpretation of questions. Lastly, it only represents individuals that chose to participate in the study.

Access more insights about online learning: We're committed to developing thought leadership and driving growth through research. From research reports to infographics and case studies, our resources offer insights into how your college or university can succeed as higher education evolves.

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[1]Department of Education. (2023, December 18). *2022 Student summary tables.* https://www.education.gov.au/higher-education-statistics/resources/2022-student-summary-tables

Appendix

This appendix contains additional charts that provide further insights into the themes discussed in the main body of the report. While these charts were not included in the primary sections, they offer valuable supplementary information to better understand today's learners and help to deepen the understanding of key patterns and trends observed in the study.

Why did you choose to pursue an online degree instead of on-campus or in a hybrid format? (Select all that apply.)

Reason	Percentage
Flexibility of taking classes from wherever I want	64%
Better balance taking classes with work and/or personal obligations	60%
Convenience of taking classes whenever I want	57%
The faster time to completion	33%
The format/structure of the program	32%
The teaching quality	28%
Having a certain level of anonymity	21%
There are no universities near me offering the program options I was looking for	17%
Other (please specify)	3%

Prospects: *What are your concerns about online learning, if any?*
Current/Grad: *What challenges or frustrations have you experienced with online learning, if any? (Select all that apply.)*

Concern	%
Lack of interaction with classmates	40%
Increased need in self-discipline/motivation to complete the subject	39%
Lack of interaction with academic	37%
Teaching quality	33%
Clarity of expectations	29%
Heavy workload	27%
Quality / Timeliness of academic's feedback	25%
Format (e.g. only small video clips or reading materials and assignments)	24%
Inconsistency across subjects (e.g. differences in due dates, grading standards, curriculum, navigation)	23%
Learning pace being too fast	21%
None	5%
Other (please specify)	3%

What were/will be the most important factors in your decision to apply/enrol to a program? Please choose your top three factors:

Factor	Percentage
Affordability of fees	61%
Offered quickest path to a degree / Time to complete the program	38%
University/program accreditation	35%
Program concentrations / Specialisations within the degree	32%
Location of the university	28%
Rank / Reputation of the university/program	26%
Academics' reputation	26%
Familiarity with the university / Connection to the university (e.g. alumni, legacy)	11%
My employer had a relationship with the university	4%
Other (please specify)	3%

If the program you want/wanted was not available in an online format at the university of your choice, would you most likely:

Option	Percentage
Find the program online at a different university	50%
Enrol in the on-campus program at the same university	32%
Enrol in a different program online at the same university	13%
Not enrol in a program	6%
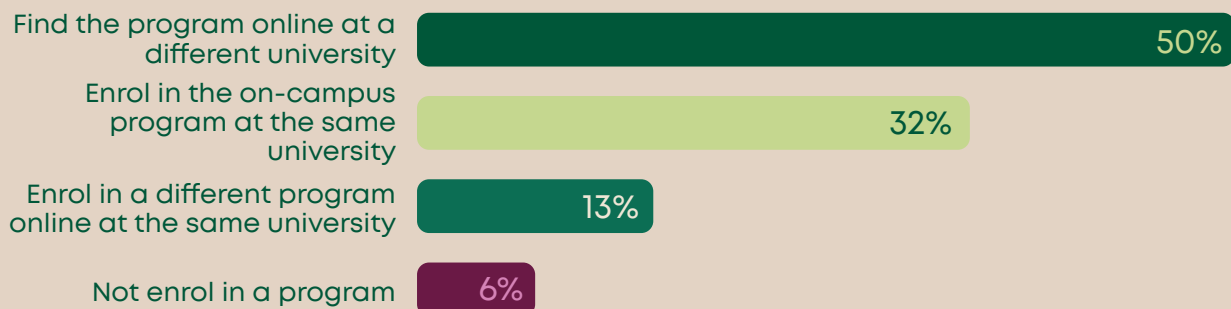
How important are/were the following factors that first lead/led you to look at a program?

Affordability of fees:

Extremely important	40%
Very important	32%
Moderately important	19%
Slightly important	7%
Not at all important	3%

University/program accreditation:

Extremely important	27%
Very important	43%
Moderately important	21%
Slightly important	6%
Not at all important	3%

Academics' reputation:

Extremely important	23%
Very important	40%
Moderately important	26%
Slightly important	8%
Not at all important	3%
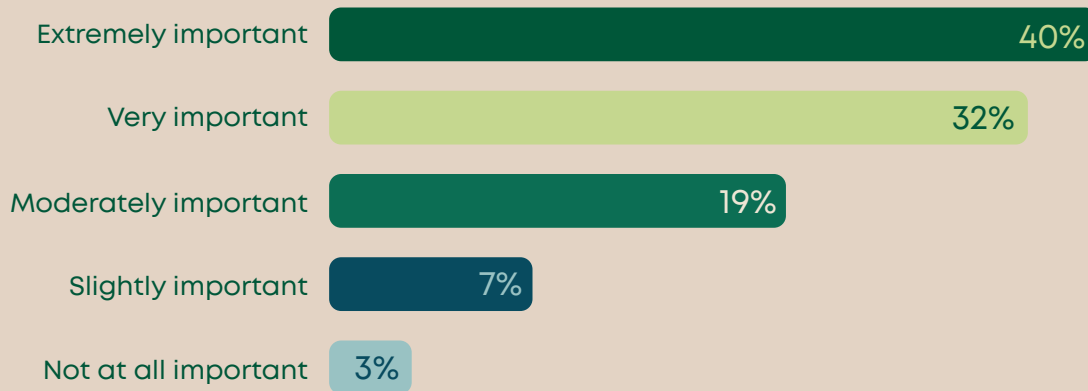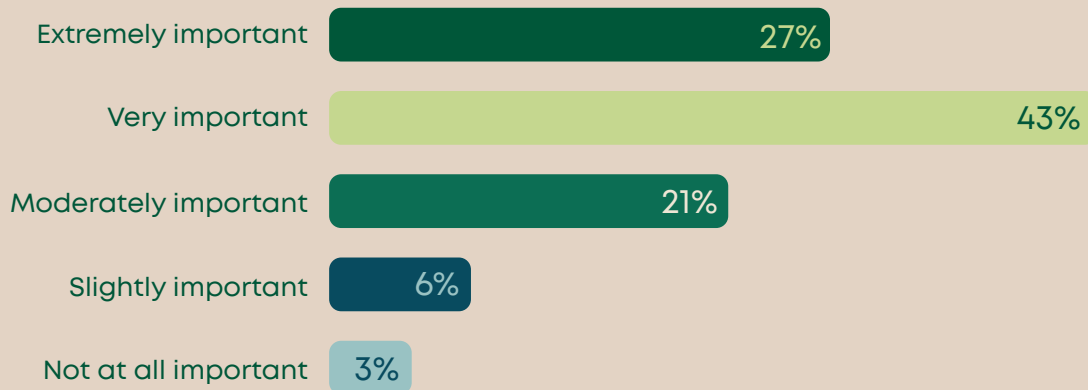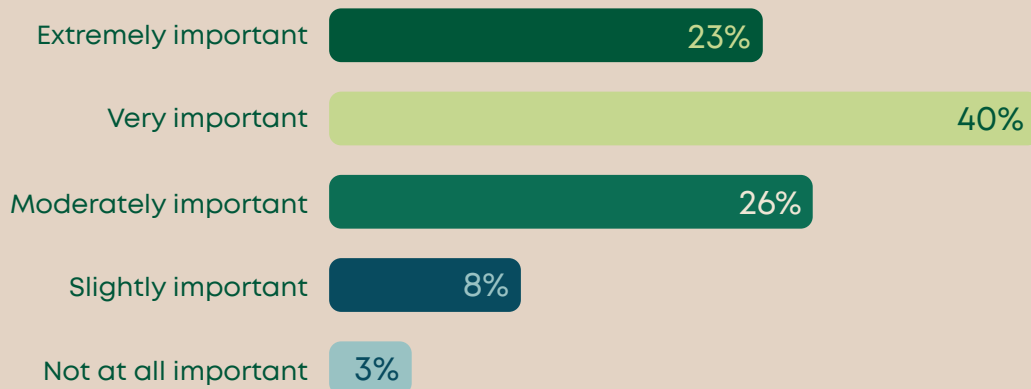
What are / were the main reasons you would choose / chose NOT to apply to or enrol in a program? (Select all that apply.)

Reason	%
Fees were too high	59%
Time to complete was too long	34%
Did not have a concentration or specialisation I wanted	32%
Lack of university/program accreditation	22%
Location of the university	21%
Too many credits / subjects	15%
Academics' reputation	11%
Rank / Reputation of the university/program	11%
I am only considering or considered one university	9%
University is outside of my employer's funded higher education program	8%
Other (please specify)	4%

When thinking about the format of a program, which options do you prefer from the following options listed below?

Subject format:

Option	%
No required online attendance (i.e. no specific live online class times)	56%
Required online attendance learning (i.e. all students are online at the same time for at least some classes)	44%

Campus visit:

Option	%
Fully online program without a required on-campus visit	55%
Visiting campus for a short on campus requirement (i.e. 2-7 days over the course of a class)	45%

Please indicate how likely you would be to enrol in one university over another if the following benefits were available.

Guaranteed $15–20k promotion in career within 12 months:

Very likely	62%
Somewhat likely	29%
Not at all likely	8%

Which of the following statements about fees is closest to how you did/will make your most recent enrollment decision?

Fees for my preferred program are higher than some, but the program's convenience, format, schedule, and/or location are ideal for me	32%
Fees for my preferred program are the lowest among the programs I evaluated	26%
Fees for my preferred program are higher than some, but the content is what I want	22%
The university and the program have the best reputation	20%

How likely are you to take part in online learning again?

Very likely	26%
Likely	49%
Neither likely nor unlikely	19%
Unlikely	4%
Very unlikely	1%

After you finish your program/Now that you received your degree, how likely is it that you will go back to university for another degree program, certificate, microcredential, etc.?

Response	Percentage
Very likely	7%
Likely	17%
Neither likely nor unlikely	25%
Unlikely	38%
Very unlikely	13%
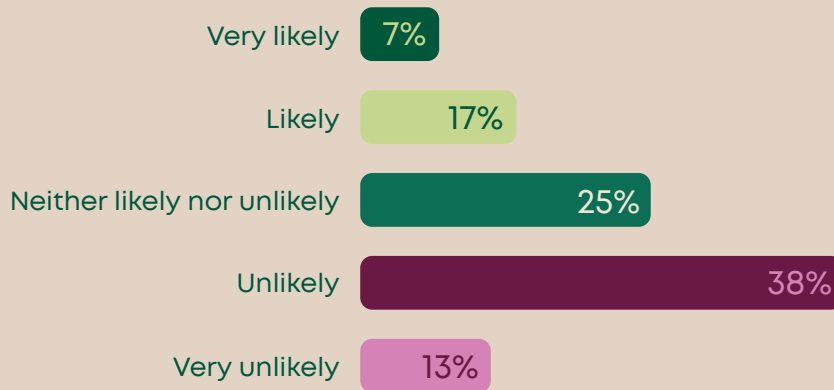
How likely would the following incentives be/have been in swaying you to choose one program over the other?

Legend: Not at all likely | Somewhat likely | Very likely

Incentive	Not at all likely	Somewhat likely	Very likely
Recognition of Professional Learning (RPL)	8%	37%	55%
FEE-HELP loans	12%	28%	61%
Commonwealth Supported Places (CSP)	9%	30%	62%
Recognition of prior learning/credit for previous study	8%	34%	58%
First and/or last class free	15%	44%	41%
Fee discount	5%	29%	66%
Scholarships	13%	36%	50%
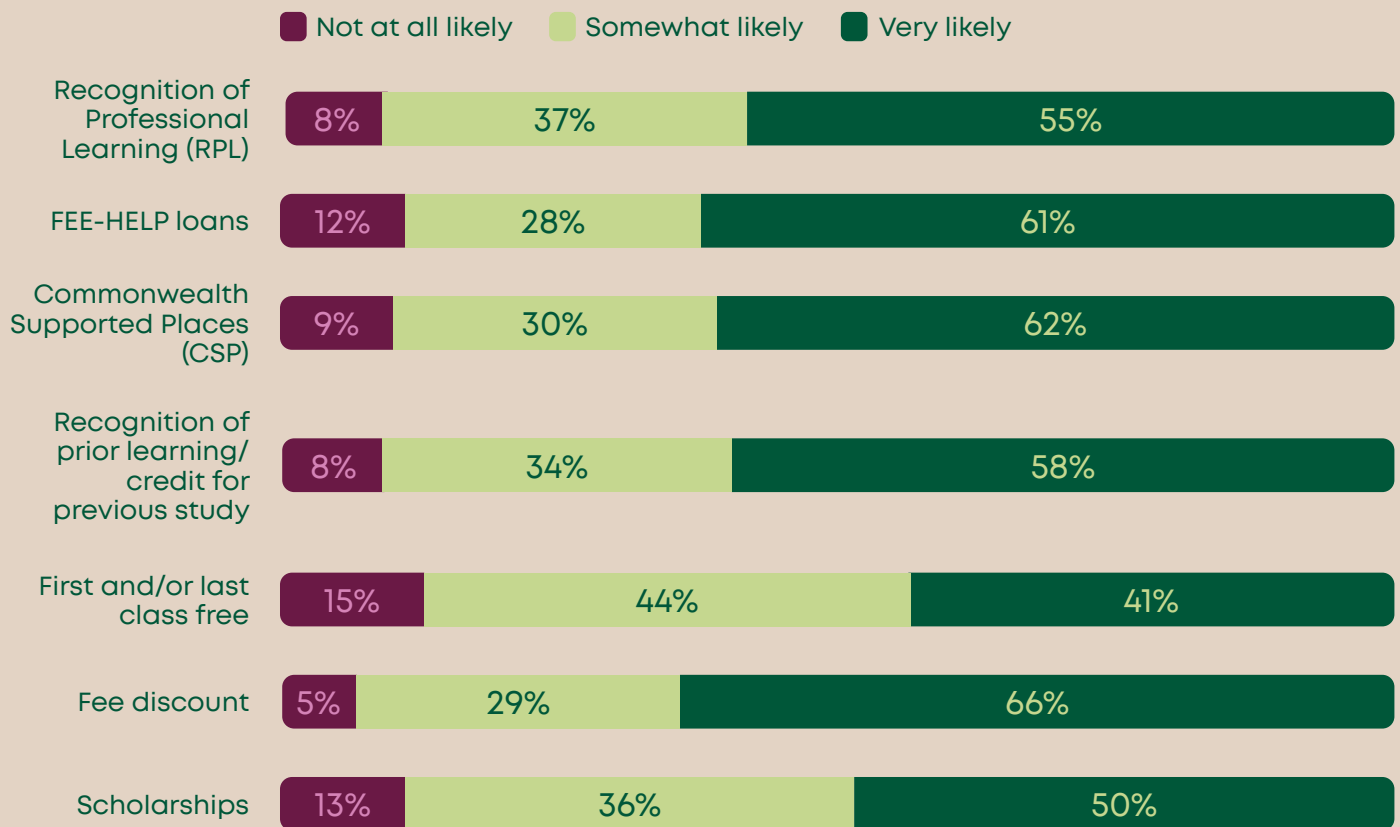
Are you open to pursuing any of the following non-traditional degree alternatives?
(Select all that apply.)

Category	Percentage
Trade skills certificate/experience	34%
Industry certifications (e.g. Six-Sigma, PMP)	34%
Higher education credits but no degree	28%
No, I am not open to any of those	27%
Non-credit certificate or course options (e.g. micro-credentials, digital badges)	25%

How strongly do you agree or disagree with the following statements?

I would value a no-obligation short course experience before committing to a full postgraduate program:

Response	Percentage
Strongly agree	17%
Agree	40%
Neither agree nor disagree	29%
Disagree	10%
Strongly disagree	5%
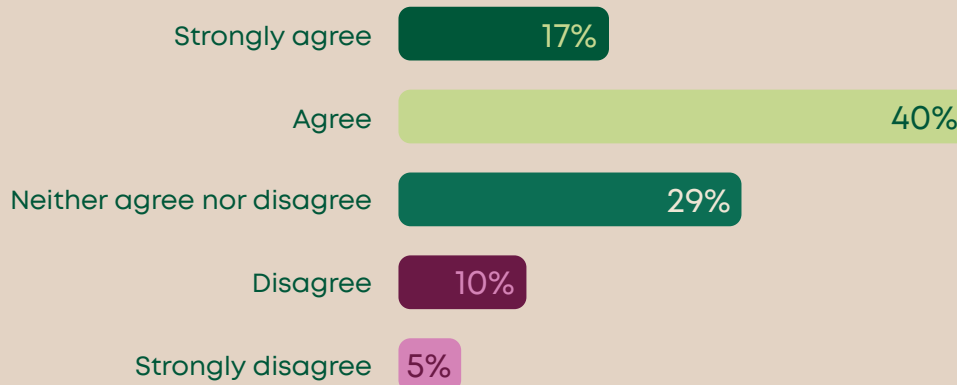
Please indicate how likely you would be to enrol in one university over another if the following benefits were available.

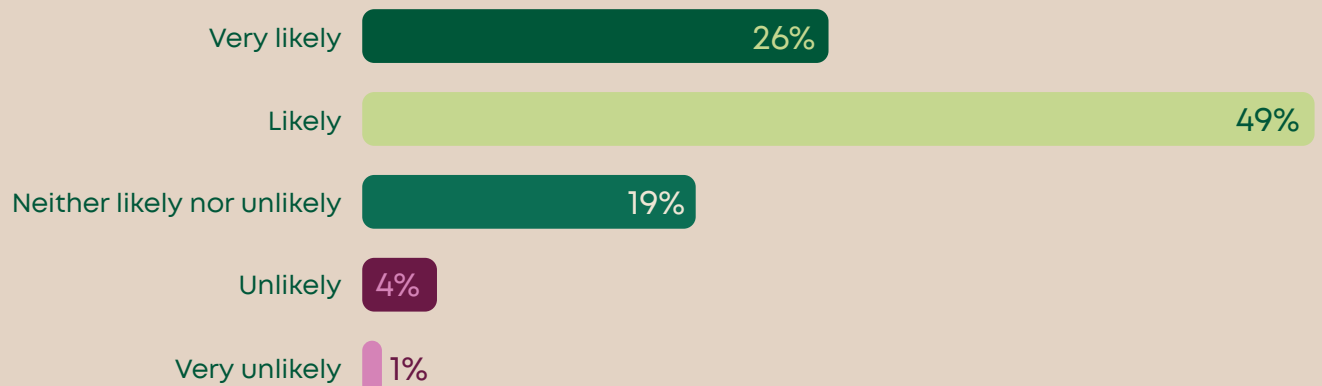### Availability of a cheaper, university-issued Professional Certificate option, which gives credit towards a postgraduate qualification with a low-interest government loan:

Response	Percentage
Very likely	46%
Agree	42%
Neither agree nor disagree	13%
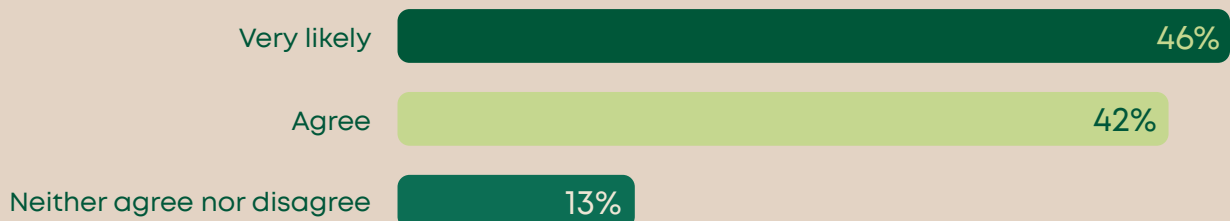
Please select which of the following factors influenced your decision to pursue a degree. (Select all that apply.)

Factor	Percentage
Achieve personal growth	56%
Gain more marketable skills and/or certifications	43%
Career advancement / promotion	41%
Broaden knowledge of a particular subject matter	38%
Salary increase	35%
Make my family proud / set a good example	29%
To get first professional/ salaried job (i.e. start first career)	29%
Switch to a new career	29%
Increase my confidence in the workplace	28%
Employer or industry requirement	19%
Returning to the workplace	13%
Complete the degree I had previous credits for	12%
Other (please specify)	2%

How interested would you be in the following certificate options if they were available in your subject area of interest?

Legend:
- ■ Not at all interested
- ■ Slightly interested
- ■ Moderately interested
- ■ Very interested
- ■ Extremely interested

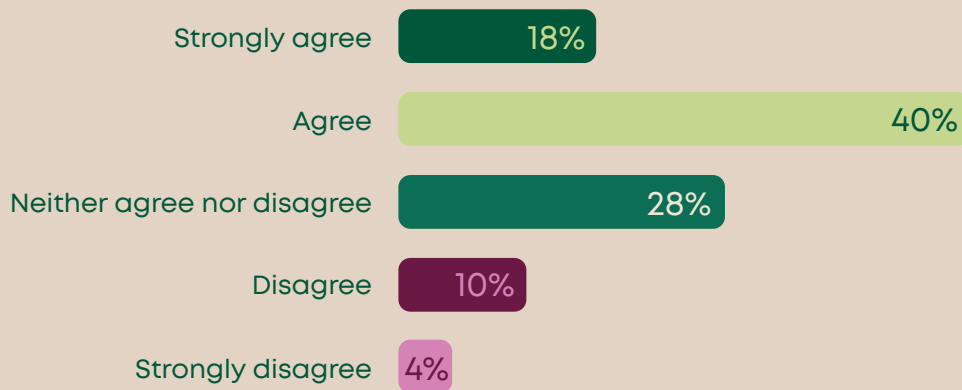| Certificate option	Not at all interested	Slightly interested	Moderately interested	Very interested	Extremely interested
Completing a certificate program to gain a new skill for my career	11%	15%	32%	29%	13%
Completing a certificate program to get a pay increase or promotion	7%	12%	32%	33%	16%
Completing a certificate program to become a subject matter expert	6%	10%	29%	37%	19%
Completing a certificate program to remain competitive in my current career	7%	10%	29%	35%	18%
Completing multiple certificates over time that would earn me a degree	5%	9%	25%	38%	24%
Completing a certificate or microcredential program that would lead to my admission to a degree program	4%	10%	28%	38%	20%

Please indicate how much you agree or disagree with the following statements about Gen AI.

Going to create new types of jobs and career paths:

Strongly agree	18%
Agree	40%
Neither agree nor disagree	28%
Disagree	10%
Strongly disagree	4%

Important to learn and understand to be successful in the workplace in the future:

Strongly agree	18%
Agree	40%
Neither agree nor disagree	28%
Disagree	10%
Strongly disagree	4%