2025

Voice of the Online Learner: Australia Edition

Risepoint


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Contents

Dear University Leaders,

It is my pleasure to introduce the Voice of the Online Learner report for 2025. Building on our comprehensive 2024 report, we provide the latest insights from Australia's largest survey dedicated to adult learners enrolled — or intending to enrol — in online degree or certificate programs.

Our 2024 and 2025 Voice of the Online Learner surveys were structurally very similar to allow for trend analysis, but there were some important differences. The 2025 survey introduced new areas of emphasis, particularly around career-connected features.

It also strengthened the employability and return on investment (ROI) focus, with more attitudinal statements from students on their perceptions of online program value.

In addition, the 2025 survey included refined generative AI questions and a broader "future of learning" section that tested respondents' openness to gaining micro-credentials, industry certifications, and shorter online certificates.

The 2025 data show significant educational needs emerging in Australia's rapidly evolving study and employment landscapes. Key findings include:

- The strong connection between online learning and contemporary workplace needs, including the increasingly strategic use of generative AI technology to drive career relevance, innovation, and workforce transformation — not just productivity enhancement.
- The value that students are increasingly placing on non-traditional, short-course formats to quickly provide them with tangible career outcomes — job security, upskilling, pay rises and career promotion opportunities.
- Affordability and mobility continue to be the dominant forces shaping how Australians choose where and what to study, with the majority of online learners citing cost as their primary decision driver and more than half willing to switch institutions to access their preferred program online.

Key survey findings like these and others contained in this report present an opportunity for higher education institutions to tailor their online course offerings to contemporary student and employer demands. We trust that it will provide you with valuable, data-supported insights.

Yours sincerely,

Terry Burkitt
VP, Education Services, APAC

84%

agreed that generative AI is important to learn and understand to be successful in the workplace in the future, compared to 61% last year.

60%

believe that they can gain a promotion with a 4-subject graduate certificate, compared to just 43% last year.

53%

are open to short online certificates or micro-credentials, compared to just 25% last year.

Introduction

Welcome to the Voice of the Online Learner for Australia. This 2025 report reflects our commitment to bring our expertise to guide the success of online programs for the universities we serve.

The strategic importance of online learning in Australia

Online learning:

- Plays a critical role in addressing Australia's national workforce needs, especially in fields facing acute talent shortages such as healthcare, education and technology (two-thirds of the respondents in our online survey were from these crucial skills shortage areas).
- Provides upskilling and reskilling opportunities for working adults, helping them adapt to rapidly changing industries and employer expectations in the disruptive age of generative artificial intelligence.
- Has become a cornerstone of strategies to fill skill gaps and prepare workers for the future economy as governments and employers push for greater alignment between education and workforce outcomes.
- Expands access for learners in Australia's regional and rural areas who may not otherwise have feasible higher education options.
- Enables Australians to balance study with work and family commitments, directly supporting lifelong learning and career mobility.

Modern learners are predominantly working adults balancing careers, families, and competing priorities — motivated by advancement, flexibility, and the promise of education that aligns with their professional and personal realities.

Against this backdrop, our survey findings are divided into five sections to help university leaders better understand the contemporary online learning environment.

01

Trending online learning perceptions

Both student and employer perceptions continue to strengthen

02

Student outcomes

Career employability matters more now to all learners than ever before

03

Gen AI in higher education and the workplace

Usage and expectations are rapidly accelerating

04

Online program value and selection drivers

Affordability and workplace connections are crucial

05

The future of learning

There is rising demand for job-aligned micro-credentials

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

01

Trending online learning perceptions

Our 2025 survey of Australia's online learners identified five strong trends.

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

01 There is a strong connection between online learning and workforce outcomes. Demand for non-traditional, short online courses is therefore increasing.

02 Learners increasingly perceive quality and value in online learning.

03 Generative AI is increasingly becoming an online learning and workplace tool.

04 Affordability and mobility are major drivers of online learning enrolment decisions.

05 Some online learning challenges remain, despite its benefits.

"Online study helps to keep your CV up to date so you're ready for new career opportunities when they crop up."

Jasmine, RN, exploring micro-credentials in advanced patient care

Strong connection between online learning and workforce outcomes

Career impact is a crucial consideration for online learners:

84%

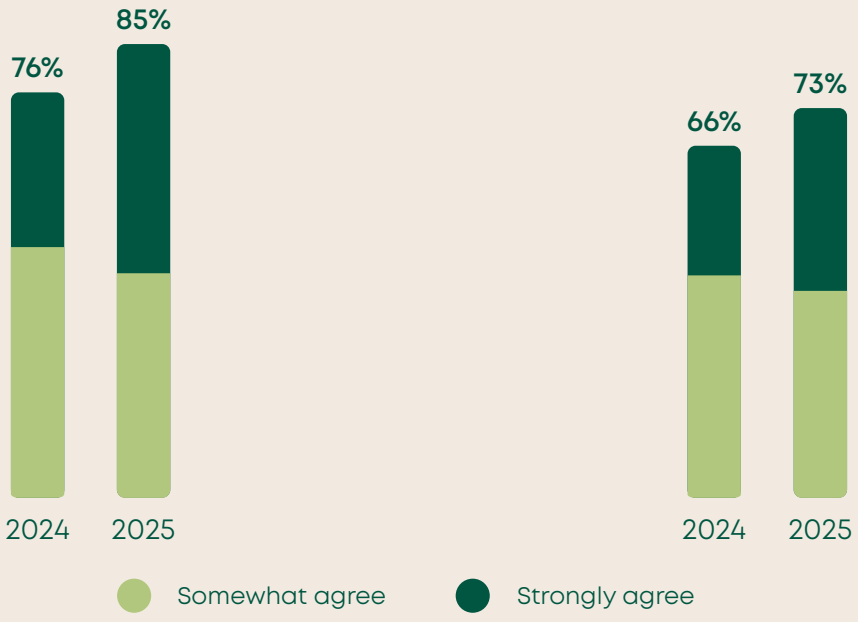
agreed that their online degree is significant in helping them achieve career goals (up from 76% in 2024).

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

73%

believed that they need additional credentials beyond a bachelor's degree to improve their career prospects (up from 66% in 2024).

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



The strong connection between online learning and beneficial workplace outcomes is explored in more detail in Section 2 of this 2025 Voice of the Online Learner report.

Key takeaway for universities:

The alignment of online offerings with emerging workforce needs is critical.

Learners and employers perceive quality and value in online learning

Learners are increasingly reporting strong confidence in the quality and value of their online programs:

88%

agreed that their online program is worth their time (up from 79% in 2024).

76%

believed that their online program is worth the cost (compared to 66% in 2024).

My online program is worth my time

My online program is worth the cost

Younger students and undergraduates reported the strongest confidence in the value and career benefits of online degrees, while older students, graduate students, and vocational/certificate learners were more cautious, especially on cost and whether short-form credentials were sufficient.

Significantly, given the value online learners place on career outcomes, when asked how employers value an online degree from an accredited university, most respondents felt it holds parity with traditional on-campus programs.

Gen AI is increasingly becoming an online learning and workplace tool

84% agreed that generative AI skills are critical in the contemporary workplace, up from 61% in 2024.

79% agreed that generative AI will generate new types of jobs and career paths, up from 58% in 2024.

64% agreed that generative AI will make their future job prospects more challenging, up from 48% last year.

32% said their university integrates generative AI technologies into its curriculum all or most of the time, up from 14% in 2024.

The use of generative AI in the workplace and online learning is explored in more detail in Section 3 of this 2025 Voice of the Online Learner report.

Key takeaway for universities:

There is a significant gap between students' perceptions of generative AI's rapidly growing workforce impact and university curriculum integration of Gen AI technologies. Universities that can close this gap will enhance student readiness to capitalise on generative AI opportunities in the workplace.

Affordability and mobility drive online learning enrolment decisions

Not surprisingly, given the current cost of living and housing affordability pressures in Australia, **online course fees are a crucial consideration for online learners.**

When first considering which online program to pursue, the affordability of fees was the single most important factor, cited by 83% overall.

In addition, if their preferred program was not available at their preferred university online, **more than half (56%) said they would find the program online at a different university.**

Readiness and affordability drive interest. Decision-making is switching toward mobility, with students more likely to consider another university if their preferred program isn't online.

The drivers of online learning enrolment decisions are explored in more detail in Section 4 of this 2025 Voice of the Online Learner report.

Key takeaway for universities:

Rising cost-of-living pressures have created a strategic opportunity for universities to position online study as the affordable pathway to higher education. By emphasising lower total costs, flexible study that supports part-time work, and savings on relocation or commuting, universities can appeal directly to the affordability drivers shaping student decision-making.

Online learning challenges remain, despite its benefits

Learners identified several challenges with online study, most commonly around motivation, interaction, and consistency across subjects.

Motivation and interaction

About one-third of younger students (and a higher share of older learners) cited self-discipline and motivation as key difficulties. Limited interaction with peers and academic staff was also a recurring concern that increased with age.

Teaching and feedback

Teaching quality was raised by 31% of students overall, while concerns about feedback varied more widely, being highest among 25–29-year-olds (38%) and lowest among those aged 50+ (25%).

Workload and structure

Workload and structural issues were moderate but notable. Between one-quarter and one-third of students mentioned a heavy workload, peaking at 33% among those aged 25–29. Inconsistency across subjects was more common among 18–24-year-olds (34%) than older learners (19%), while clarity of expectations and learning pace were also greater challenges for younger groups.

Key takeaway

These findings highlight the need for universities to reimagine engagement in online learning. Strengthening support services to build motivation and connection, and bringing elements of the on-campus experience, such as debate and exposure to diverse ideas, into virtual settings, could help counter disengagement and enhance the quality of the online experience.

Key takeaway for universities:

Online learning programs need to cater for diverse learning styles and needs.

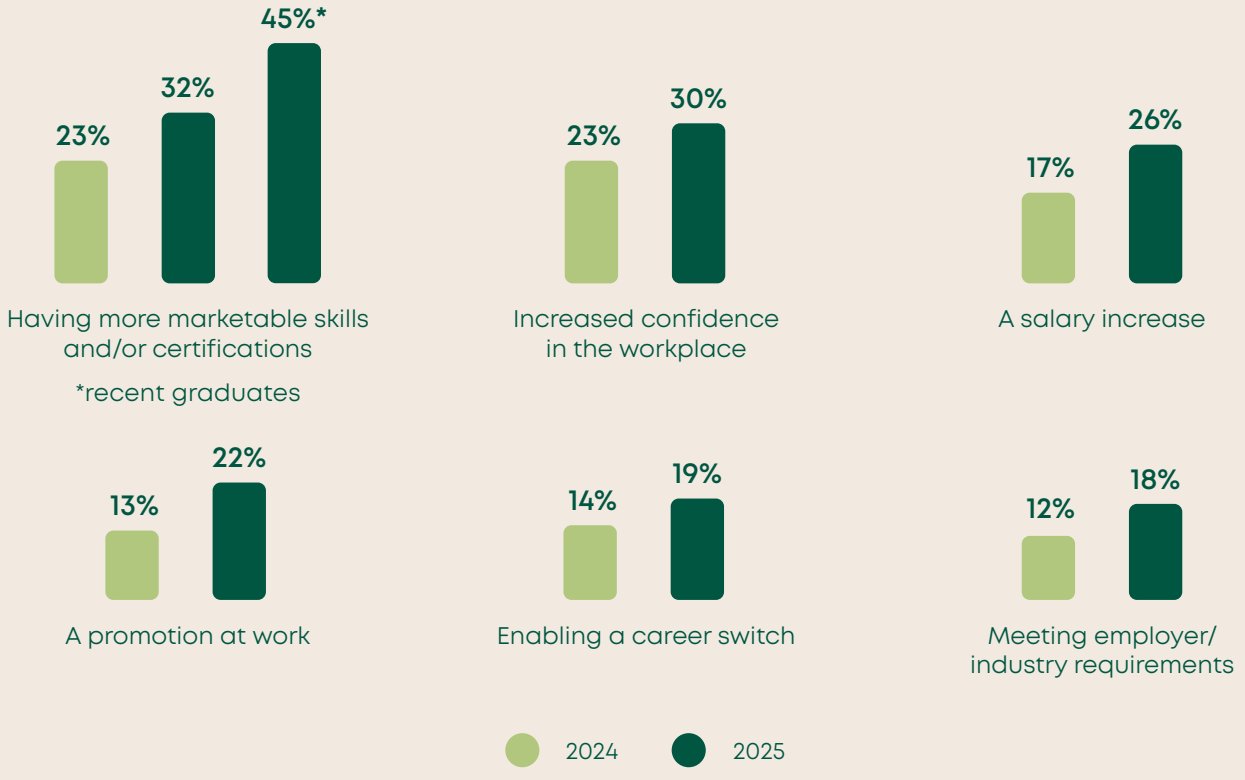
02
Student outcomes

Student outcomes from online learning increased year on year.

Student outcomes and ROI strengthened. More students attribute marketable skills, confidence, and tangible career gains to their degree. Belief in degrees as a pathway to better jobs and as an employer expectation also rose notably.

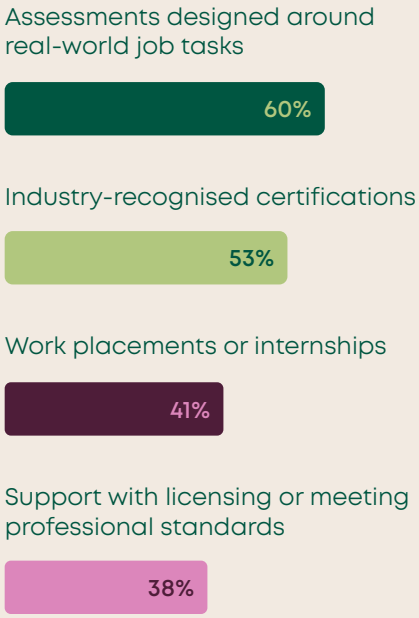
Top online learning outcomes

The top outcomes achieved by 2025 online learners either during or after graduating from their program were:



Career-connected online program features are highly valued

Learners placed the greatest value on practical, job-focused elements in their programs:



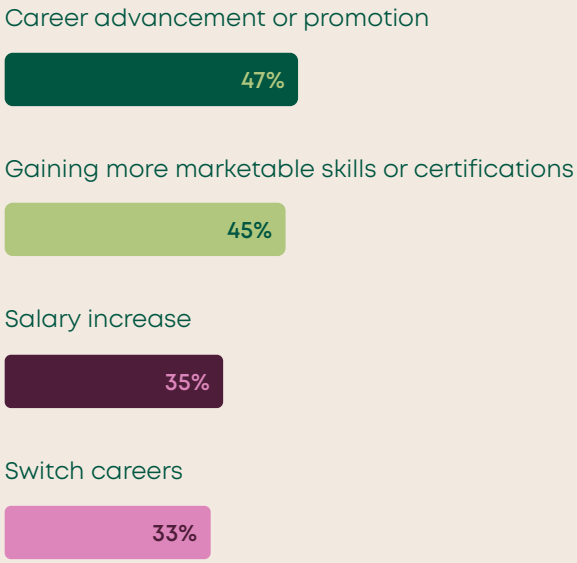
60%

of learners said the most important feature of their online program were the assessments designed around real-world job tasks

Career motivations for online learning

Students balanced personal growth with career advancement goals in deciding to pursue online learning.

The most common career-related motivations were:



Career-related outcomes appealed most to students over 30, as well as full-time, vocational and graduate learners (48–51%).

53%

said achieving personal growth was a motivating factor.

"Cyber forensics is a huge career growth area at the moment, and you need to keep up to date with everything that's happening with it."

Olivia, Graduate Certificate in Cyber Forensics

Key takeaway for universities:

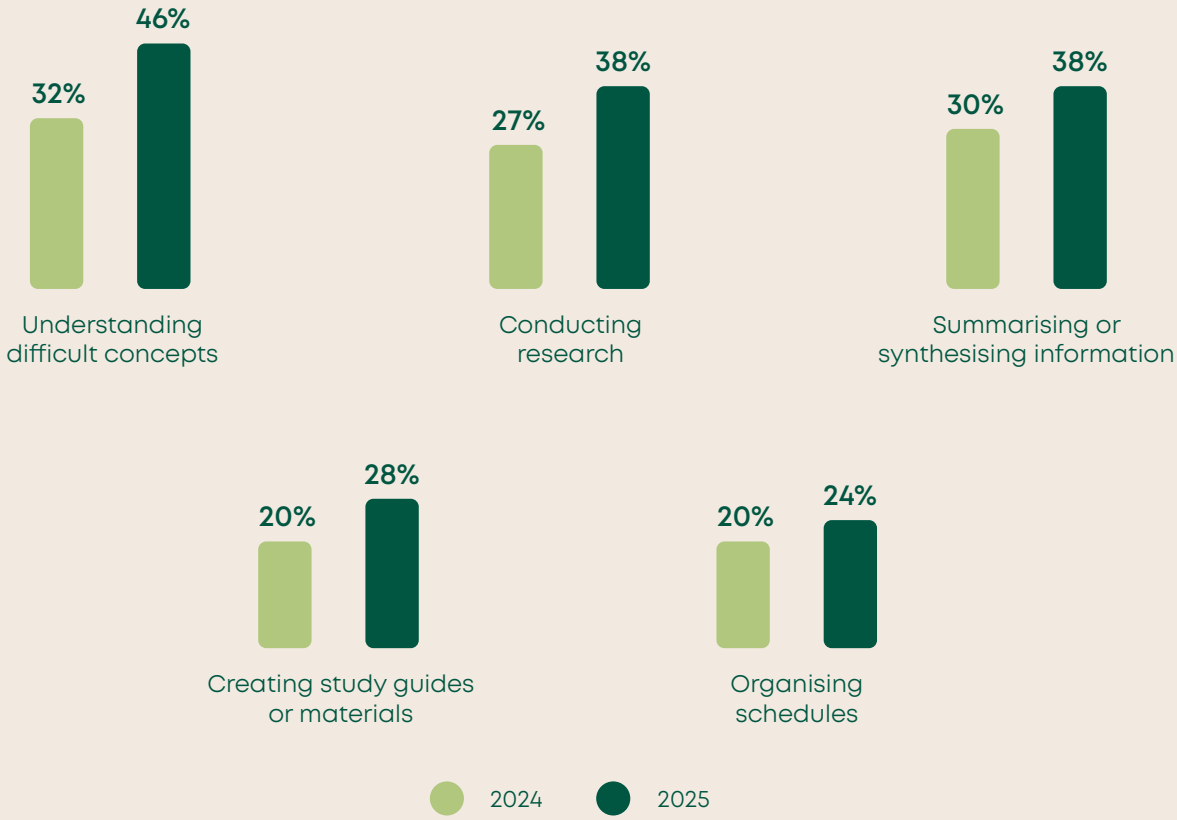
Universities that align online programs with industry-recognised certifications in high-demand fields can strengthen graduate employability and ensure meaningful career outcomes.

03
Gen AI in higher education and the workplace

Positive student use of Gen AI in learning

of students use generative AI tools in their studies, up from 69% in 2024.

The most common positive uses of Gen AI for student learning tasks are:



Age was a significant dividing line

Younger students were more likely to use generative AI to create study guides (36% vs. 25%) and organise their schedules (38% vs. 17%).

By contrast, older students leaned toward using generative AI for conceptual understanding (52%), compared with 33% of younger students. They were also far more likely to say they don't use generative AI at all (20% vs. just 5% of younger students).

Postgraduates were more likely to use generative AI for understanding difficult concepts (51% vs. 34% of undergraduates).

Use of generative AI in learning

Concerns about widespread misuse of generative AI for academic dishonesty are not strongly supported by the survey findings, though the data does reveal evolving patterns in how students use these tools.

82% of students said they don't use generative AI to complete class assignments or homework questions, though a higher number (87%) made this same statement in 2024.

Once again, age was the most significant dividing line:

28% of those under 30 reported using generative AI to complete class assignments, compared with just 13% of those 30+.

Younger students are more likely to say they have used generative AI to paraphrase text (36%) and assist with writing assignments (34%) compared to older students (23% and 16%, respectively).

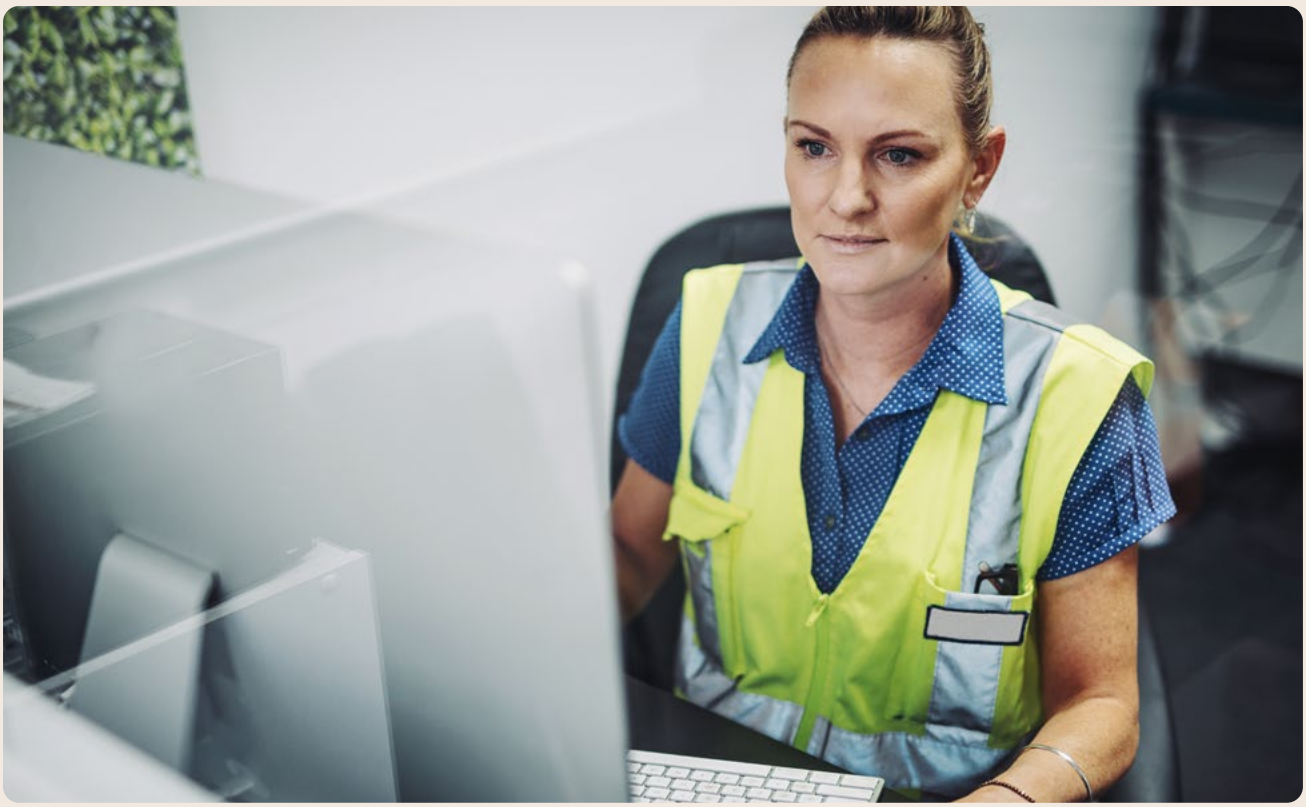
Differences by study level reflected a similar pattern:

23% of undergraduates used generative AI to complete assignments versus 15% of postgraduates.

37% of undergraduates used it to paraphrase text compared with 25% of postgraduates.

"AI is a game-changer in the workplace. You either have to get on board with how to use and manage it in your work, or you'll be left behind and replaced."

Yong, Graduate Certificate in AI Management



Key takeaway for universities:

While these findings provide insight into how students are using generative AI, they do not indicate whether that use aligns with institutional guidelines. What they do highlight is the need for clearer communication and consistent policies.

Only 53% of students said their academics have discussed the appropriate use of generative AI in their studies, suggesting a key opportunity for universities to establish and reinforce guidelines to ensure responsible, transparent use of these tools in learning environments.

University integration of generative AI

Student experiences with generative AI in their programs varied, but a notable share reported frequent exposure. Overall, undergraduates are the most likely to say that their programs have integrated generative AI.

32%

said their university has integrated generative AI technologies into its curriculum always or most of the time.

Younger students were more likely to see integration (64% under 30) compared with older students (16% over 30).

Full-time students (39%) also reported higher integration than part-time learners (30%).

A greater share of undergraduates (59%) reported generative AI integration in their programs than graduate (24%) or vocational/certificate (29%) students.

31%

said their academics encouraged them to use generative AI for university work.

Younger students again stood out (64% under 30) compared with 15% of older students.

32%

reported that their university is teaching them how to use generative AI as a workplace tool.

There is much higher exposure among younger students (61% under 30) than older students (18% over 30).

Perceptions of generative AI's impact on future careers

While most students recognise the growing importance of generative AI, there remains some uncertainty about its long-term impact on careers.

Recognition of AI's importance

A large majority (84%) agreed that generative AI skills are essential in today's workplace, a significant rise from 61% in 2024. Agreement was consistent across age groups, reflecting widespread acknowledgement of AI's relevance.

Use of generative AI in current work

Half of all students (50%) said generative AI is not yet frequently used in their current roles, similar to 47% in 2024. Younger learners were more likely to report limited use (71% of those under 30) compared with 40% of older students. Similarly, undergraduates (62%) were more likely than graduates (46%) and vocational/certificate students (46%) to say they use AI infrequently at work.

Perceptions of opportunity and risk

Nearly four in five students (79%) believe generative AI will create new types of jobs and career paths, up from 58% last year. However, optimism is tempered by concern: 64% now think AI will make their future job prospects more challenging, compared with 48% in 2024.

Younger students were notably more concerned with 78% of those under 30 expressing this view, compared with 58% of students aged over 30. This pattern was mirrored by program level: undergraduates (75%) were more likely than graduates (59%) and vocational or certificate students (62%) to anticipate increased career challenges.

Key takeaway for universities:

Generative AI is undeniably transforming both higher education and the workforce. Universities play a pivotal role in preparing students for this shift, not only by fostering the critical thinking skills needed to evaluate and apply AI responsibly, but also by integrating workforce-relevant AI applications into their curriculum.

By embedding practical, real-world AI use cases across disciplines, institutions can help students graduate with the confidence and capability to harness AI tools effectively, turning disruption into opportunity.

04

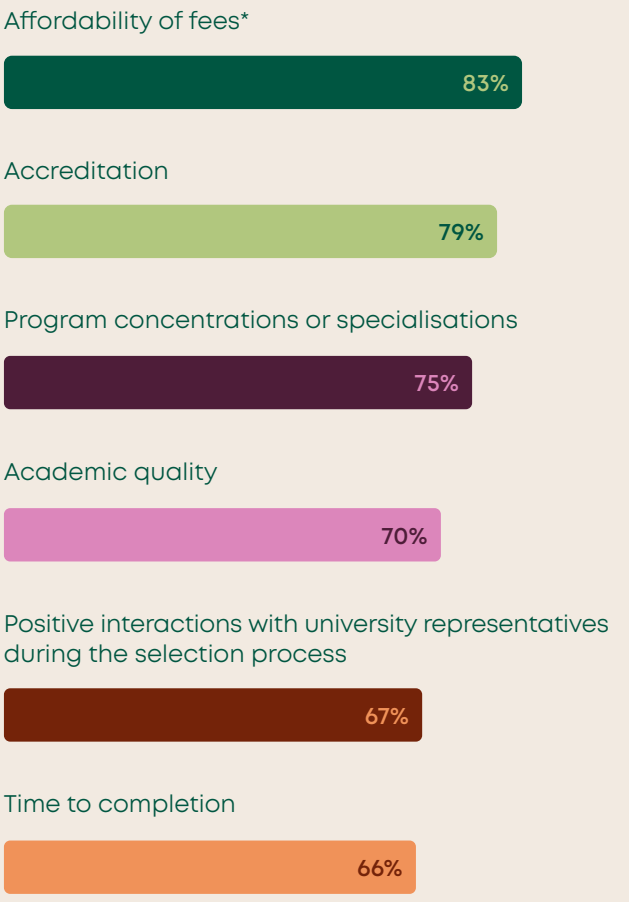
Online program value and selection drivers

For online learners, career outcomes are central to how they assess the value of study.

Eighty-one percent said that guaranteed career returns, such as the promise of a $15–20k promotion within 12 months, would strongly influence their decision to enrol. This sentiment was even higher among students under 30 and recent graduates (both 86%), showing that early-career learners are particularly motivated by clear, measurable returns on their investment.

That same career-driven mindset extends to how students choose where and what to study.

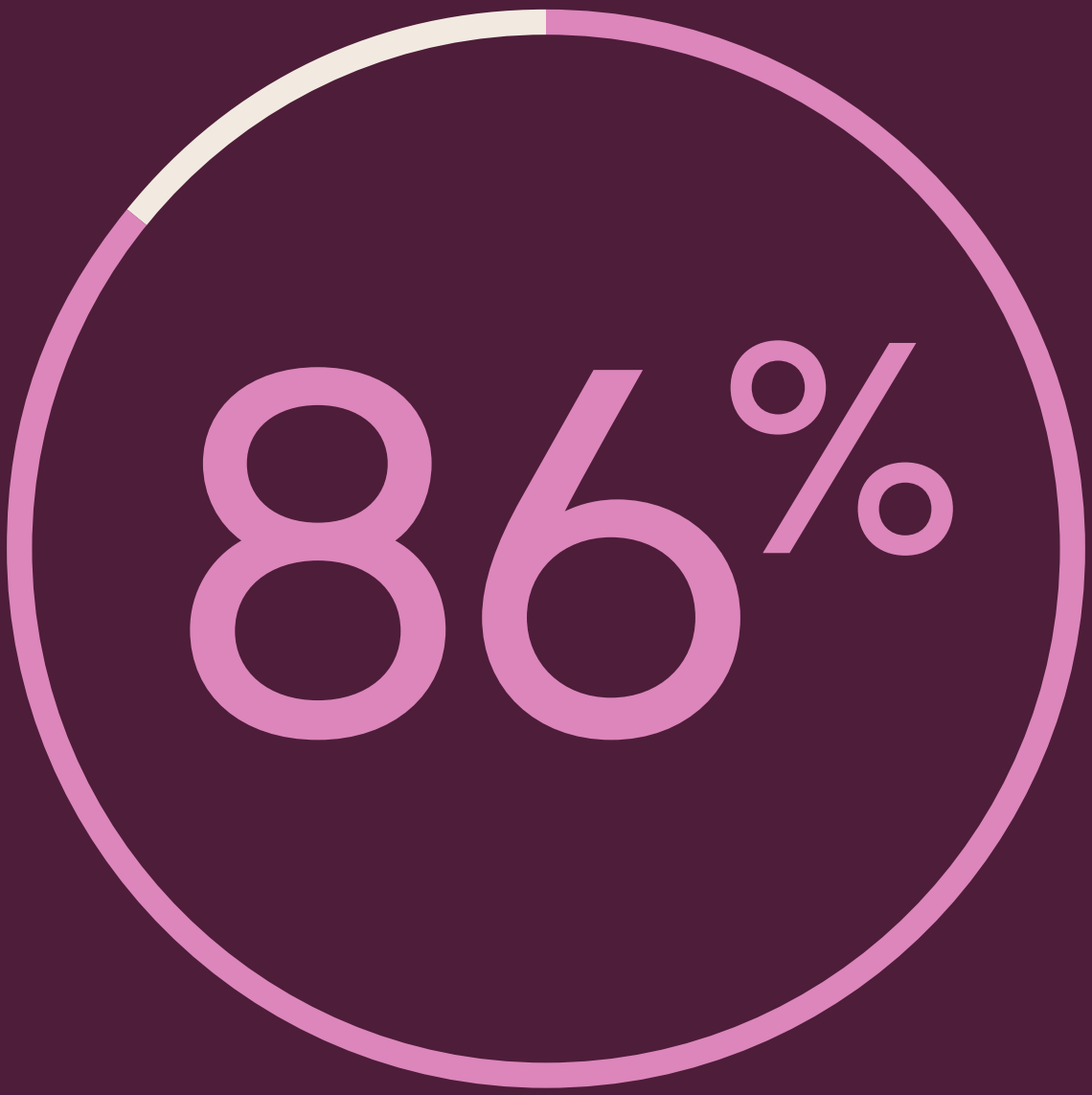
When selecting a university or program, the top six factors influencing their decision were:



*Potential students were the most price-sensitive, with nearly two-thirds (64%) ranking affordability as a top factor, compared with 55% of current students and 48% of recent graduates.

Together, these findings suggest that students are looking for programs that not only fit their budgets and schedules but also deliver real career impact. With ongoing cost-of-living pressures, learners are seeking clear value and outcomes from their education.

Universities that offer affordable, accredited, and flexible programs, alongside shorter, stackable pathways to career advancement, are best placed to meet this demand.



of early-career learners are particularly motivated by clear, measurable returns on their investment

Why online?

Online learners' top three reasons for choosing to pursue an online program instead of on-campus or hybrid programs continue to centre around balance, flexibility and convenience.

62%

of online learners believe their program enables them to better balance their study with their work and personal lives.

59%

chose online learning for the flexibility to participate from anywhere.

52%

want the convenience of taking classes whenever they want.

These results were comparable to our 2024 survey. In short, **"anywhere, anytime learning" remains a key motivator for students to choose online programs.**

Individual online learning preferences also play a role.

33% said they prefer to learn on their own

32% were motivated by the faster time to completion

30% were motivated by the format or structure of the program

> "Cost of living is still an issue, so I need to make sure any course I do is affordable, as well as helping me to get a pay rise or promotion."

Kailani, Graduate Certificate in Inclusive Education

Online program format preferences

Students continue to prioritise balance, flexibility and fully online delivery, though preferences vary by life stage and study experience.

Completion time

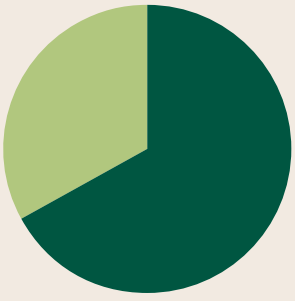
The majority of students (62%) preferred to take one subject at a time to balance study with life, compared with 47% in 2024.

The importance of the speed of completion time declined year on year, with 38% favouring taking multiple subjects at once to finish faster, compared to 53% in 2024.

Graduate students (67%) and those with children (66%) showed the strongest preference for balance. In contrast, younger learners under 30 (53%), recent graduates (46%), and undergraduates (45%) were more likely to value faster completion.

Flexibility

- **67%** favoured a flexible program with the ability to choose electives
- **33%** wanted a structured plan



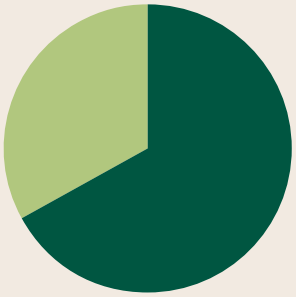
Two-thirds (67%) favoured a flexible program with the ability to choose electives, compared with 33% who wanted a structured plan. The finding is similar to the 2024 survey.

Students over 30 (72%) were much more likely to prioritise flexibility over younger students (56%).

Recent graduates stood out as more open to structure (43% vs. 27–32% in other groups).

Learning approach

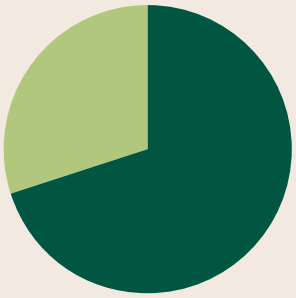
- **67%** favoured one subject at a time in 8-week blocks
- **33%** favoured two subjects in 16-week blocks



The majority (67%) favoured one subject at a time in 8-week blocks (a 10% increase over the 2024 survey finding), rather than two subjects in 16-week blocks (33%).

Campus visit requirements

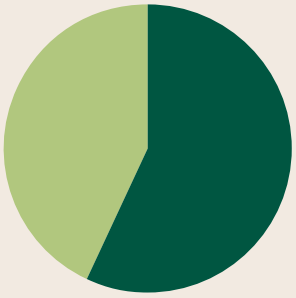
- **70%** preferred programs that were fully online with no campus visits required
- **30%** accepted some limited on-campus requirements



70% preferred programs that were fully online with no campus visits required (a 15% increase over the 2024 survey finding), while 30% accepted some limited on-campus requirements.

Subject format

- **57%** preferred synchronous learning
- **33%** favoured asynchronous formats



More than half (57%) preferred programs with required live online attendance (synchronous learning), compared to 43% who favoured asynchronous formats with no required live sessions.

Recent graduates (64%) and younger students (65%) were most supportive of synchronous study. These findings are consistent with the 2024 survey.

These results point to a strong desire for flexible, fully online programs that still offer authentic, real-time learning experiences and opportunities for connection.

The value of university support services for online learning

Support services played an important role in students' decisions about which university to attend.

The three most valued services were:

72%

said technical support, highly valued across all learner age groups.

60%

said self-assessments, especially among learners under 30, who rated them 82% compared to older students (51%).

60%

said writing centre or academic support, especially among younger learners.

Career-focused services also carried weight, especially among younger students. More than half of students valued working with a career advisor (53%), resume creation and portfolio building services (55%), and job search assistance services (53%). These services were particularly important to recent graduates.

Mental health and counselling services (57%) were valued by a majority overall, with students under 30 (76%), undergraduates (77%) and recent graduates (67%) rating them more highly than older students (48%), graduate (51%), and currently enrolled (48%) students.

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

Key takeaway for universities:

Today's online learners need affordable and flexible programs — such as short-form credentials — to boost their professional readiness. Universities need to be intentional about their online course offerings, paying close attention to program format, delivery and completion options.

05
The future of learning

The online learning landscape is constantly evolving. Generative AI is rapidly impacting both education and workforce needs.

The survey revealed three key trends shaping the future of learning:

01

Strong and growing interest in continuing education through online learning.

02

Rising demand for industry-recognised certifications and short, skill-focused micro-credentials.

03

Increasing popularity of stackable, short-course models that let students "try before they buy".

Non-degree options are no longer on the fringes — they're mainstream.

Australian universities must adapt their program offerings to thrive.

Interest in ongoing online education is strong and expanding likelihood of pursuing further online study

Interest in continuing education among online learners remains strong, with **78% saying they are likely or very likely to pursue further study beyond their current qualifications.**

This likelihood was highest among undergraduates (89%) and recent graduates (87%), while graduate students (72%) and current students (72%) were less likely to plan further study, suggesting those already at advanced levels may feel their current qualifications are sufficient.

Age also played a role, with 88% of students under 30 expressing interest in future study compared with 74% of those aged 30 and older.

While variations exist across groups, overall interest in lifelong learning remains high. This reinforces the opportunity for universities to build enduring relationships with students, supporting them not just through a single qualification, but across multiple stages of their education and career.

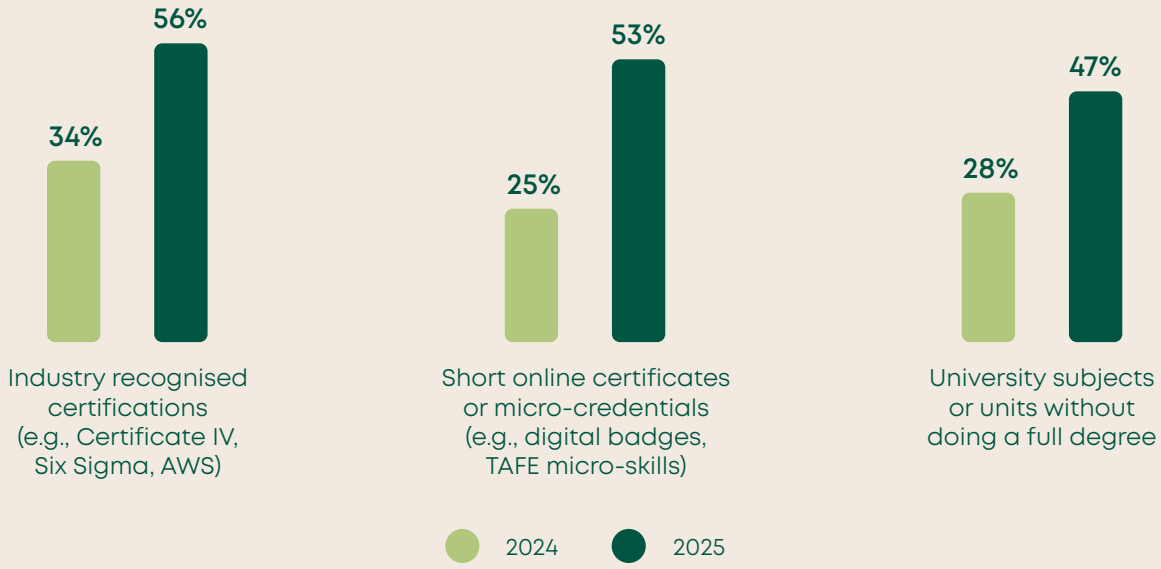
Key takeaway for universities:

Ongoing learners are highly motivated by career progression and future-proofing their careers in the age of Gen AI disruption. Universities that help ongoing learners with their upskilling and reskilling needs are well-positioned to increase their enrolments and grow their revenue.

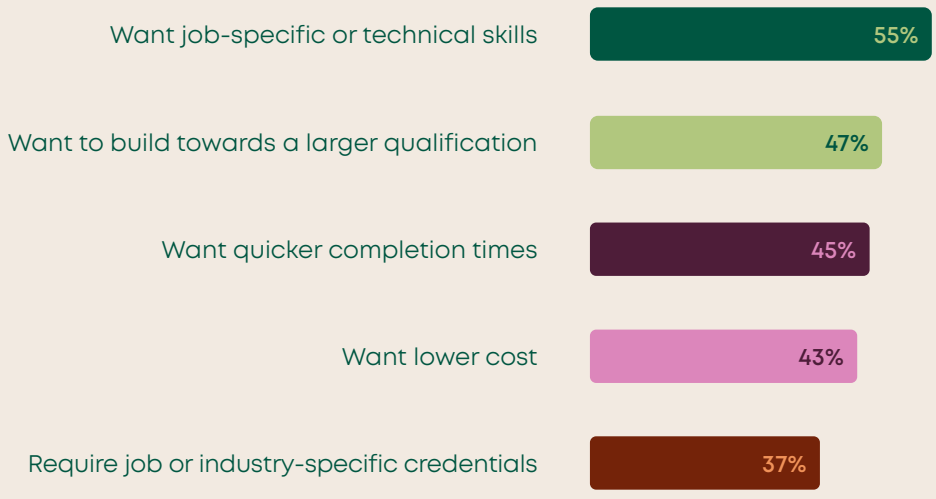
Growing demand for industry-recognised certification and short online micro-credentials

Significantly:

More than half of learners surveyed in 2025 said they would consider industry-recognised certifications (56%, up from 34% in 2024) or short online certificates and micro-credentials (53%, up from 25% in 2024). Nearly half (47%, up from 28% in 2024) were open to taking individual university subjects or units without completing a full degree.



Key motivators:



Growing interest in stackable credentials and short course, “try before you buy” models

Alternatives and stepping-stone credentials held strong appeal for students:

would value a no-obligation short course before committing to a full postgraduate program, up from 57% in 2024.

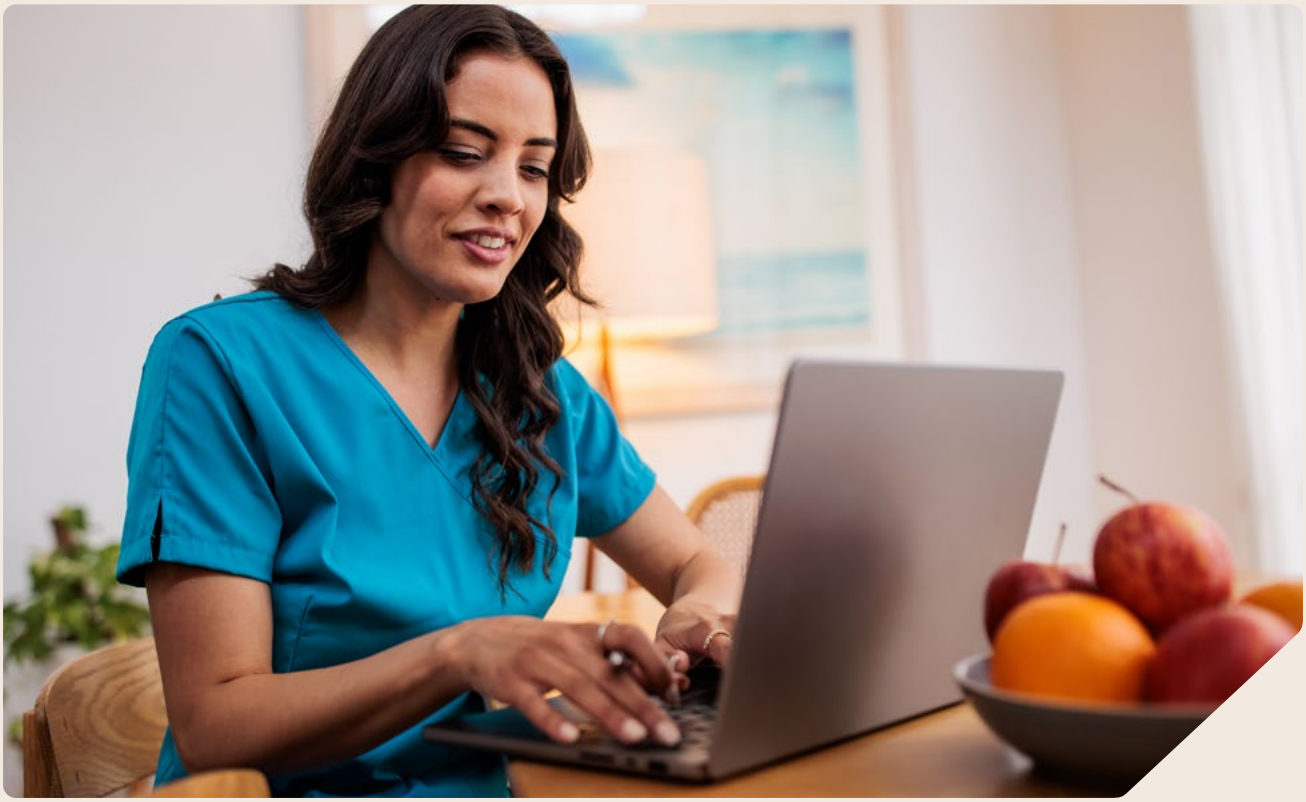
Undergraduates (74%), students under 30 (78%), and recent graduates (71%) were more likely to agree than graduate students (55%), current students (54%) and students over 30 (52%).

Age also influenced interest, with 79% of students under 30 expressing enthusiasm, compared to 68% of older students.

feel that they can attain a promotion with a 4-subject graduate certificate rather than committing to a full master’s, up from 42% in 2024.

Key motivators:

Students expressed strong interest in short credentials or certificates when linked to career benefits.



Conclusion

The findings of this report demonstrate the powerful and evolving role of online education in shaping the future of both higher education and workplaces in Australia.

The increasing adoption of generative AI technologies by Australian students, universities and workplaces presents both a challenge and an opportunity for online course providers in higher education.

Both learners and employers value online learning, but students are increasingly focused on obtaining tangible career outcomes to justify their investment in ongoing education.

Offering lower-cost, short-form credentials or partnering with employers to deliver the certification skills they need will help institutions attract a broader range of students, particularly lifelong learners and those financing their education independently.

Universities that can adapt to this trend by offering high-quality, industry-relevant short-form content will not only serve critical skills shortage markets, but also create new revenue streams.

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 career alignment, technological innovation, flexibility and affordability in their online course offerings, institutions will play a significant role in shaping Australia's workforce as it adapts to the age of Gen AI disruption.

Methodology

This study was conducted in August 2025. Risepoint received survey responses from 1,801 individuals across Australia in 2025. Respondents were at least 18 years of age, had a minimum educational credential of a secondary school certificate or equivalent, and were recently graduated (within 12 months), currently enrolled, or planned to enrol (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 1,801-student sample comprised a national external panel of 746 responses and an internal survey of 1,055 prospective, current and recently graduated students enrolled at Risepoint client institutions.

DISTRIBUTION & SCREENING:
Survey reach widened with stronger partner participation. This year's survey was sent to 4x as many students and is 60% partner institution students versus 40% last year. External panel screening added APAC residency criteria, strengthening relevance.

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 in, or recently graduated from 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. Based on the number of higher education students enrolled in courses offered primarily online with little to no requirements to attend in person in Australia[1], a sample of 1,801 students represents an approximate sampling error of +/-2.3% at a 95% confidence level.

TECHNICAL NOTES:
All percentages in this report have been rounded. Therefore, the total percentage 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 1,801 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.

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[1]Department of Education. (2024, December 18). 2024 Student summary tables. https://www.education.gov.au/higher-education-statistics/resources/2024-student-summary-tables

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