

2025

Voice of the Online Learner



Risepoint



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Introduction

The 2025 Voice of the Online Learner report, in its 14th year, reflects our commitment to understanding online learners and supporting universities in fulfilling their needs, especially as they evolve over time.

Through this report, we share online students' motivators, learning preferences, and challenges. With these learnings, universities have an opportunity to design programs and offerings that will provide the most value and impact for their students, employers, and the local communities they serve.

As the 2024 report reflected, the COVID-19 pandemic helped shift public perception of online learning — because of the global shutdown, opportunities to pursue education in an online format became more normalized and, in some instances, expected. With the pandemic in the rear-view mirror, attitudes about online learning stabilized and we entered what many term the “new normal.”

This year, a different set of factors influenced respondents. We surveyed 3,778 prospective, current, and recently graduated US online learners about their motivations, preferences, and experiences as students of online programs. Responses were collected in January and February of 2025.

Coming on the heels of a presidential election and on the precipice of an AI revolution, these responses reflect the attitudes of learners looking ahead to an era filled with change they couldn't yet predict. Despite such uncertainty, most of their responses held firm in the areas that have long been established as important for online learners — affordability, flexibility, convenience, and job-relevance. In some areas, however, their uncertainty comes through more clearly, such as in their pleas for more guidance around AI or their increasing use of household income to fund their programs.

Another area in which we saw a notable shift was the desire for connection, most specifically when it comes to visiting campus. Modern learners are breaking down the traditional walls between online and offline, looking for learning opportunities that meet their immediate needs in the ways they want them to be met, which includes having options for connection with their peers and professors.

In an expanded section on lifelong learning, we uncovered additional insights about the value that learners do — and sometimes don't — see in alternative credentials. While use of such learning experiences is on the rise, skepticism remains in some areas, such as employer recognition of non-degree programs.

In addition, understanding of the ability to stack programs toward an ultimate degree is limited and presents an opportunity for universities seeking to meet people's immediate learning needs while also providing them with pathways to more significant educational achievements.

Who we surveyed:

Age

Average	37
Undergrads	36
Graduates	37
Certificates	42

Gender

Female	67%
Male	29%
Other	4%

Race

White	66%
Black or African American	21%
Hispanic/Latino/Spanish	16%
American Indian or Alaskan Native	4%
Asian	5%
Middle Eastern or North African	1%
Native Hawaiian or Pacific Islander	1%
Preferred not to say	5%

Annual household income

Earn more than \$100K	33%
Earn less than \$100K	60%
Preferred not to say	7%



- 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

Consistent themes

Online learners have distinct challenges and motivators that continue to drive their preference for online programs. These differences influence their sometimes nonlinear education journeys and stoke students' desire for a faster degree completion time.

The affordability of a program is still the top decision-making factor for online learners. As busy working adults, most of whom are parents, they require the flexibility that online learning provides, especially compared to on-campus or hybrid degrees. And the vast majority of them still want to stay local, with most living or working in the same state as their program.



Emerging findings

01. Learners are seeking opportunities for support and connection

Online learners want the flexibility and format of online learning; however, they are increasingly open to additional opportunities to receive academic support and foster social connections, which can include on-campus activities. Notably, online learners want this as an option, rather than as a requirement, due to the competing demands most learners juggle.

02. Learners know Gen AI will change their jobs — and they need help

Students recognize the growing importance of Gen AI for future job success and cite concerns around lack of integration within their current working or learning experiences. Compounding their concern is their uncertainty as to the impact that Gen AI will have on their future job prospects.

03. Learners seek in-role growth more than job changes — and feel some uncertainty

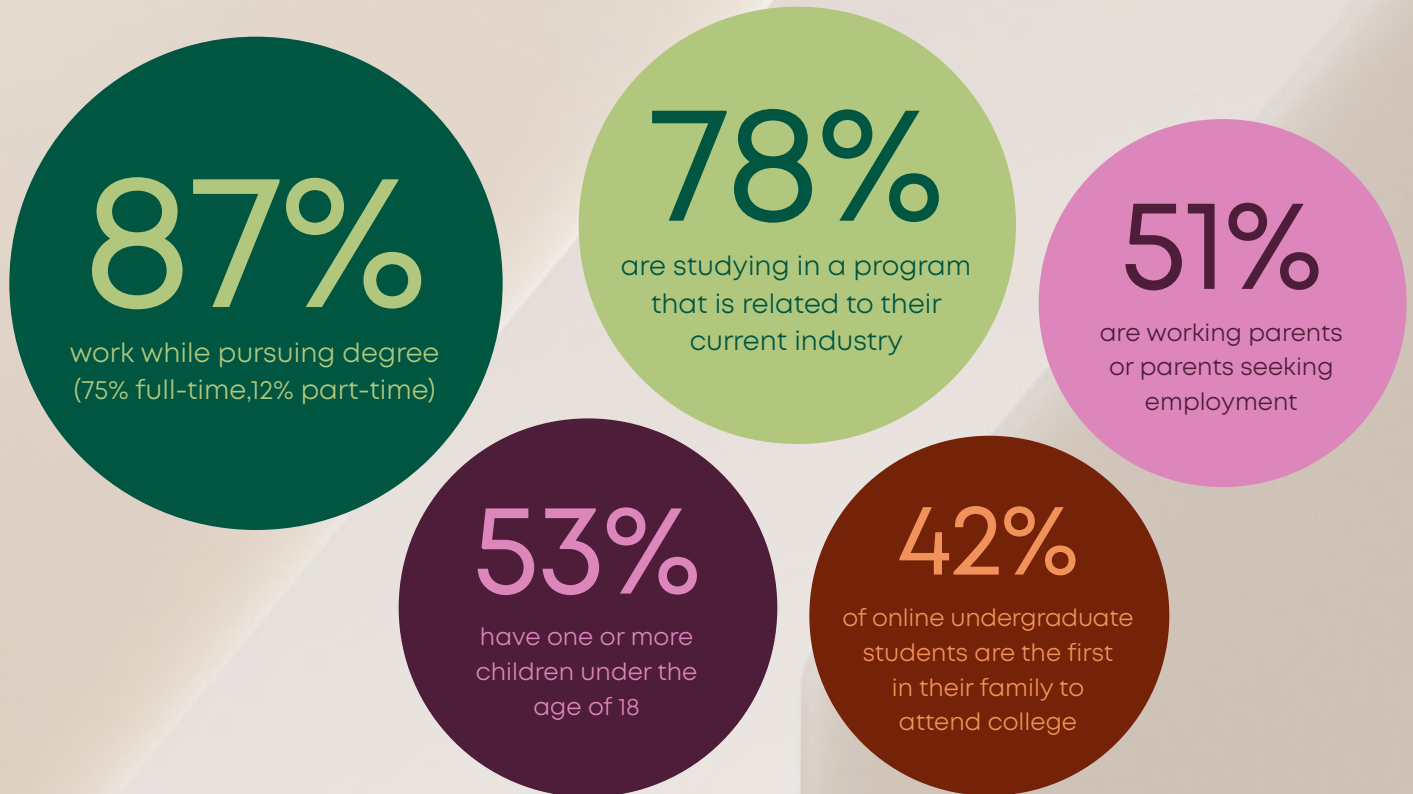
A large percentage of prospective, enrolled, and recently graduated students see online education as the means to advance within the career path that they're already following, by obtaining new skills to improve performance in their existing roles, increased salaries, or internal promotions. Their desire to up-skill also influences their interest in alternative credentials and online non-degree programs. In addition, learner behaviors are pointing to some early signs of economic uncertainty.

04. Learners see alternative credentials for immediate, rather than long-term, benefit

In an expanded section on lifelong learning and alternative credentials, we saw that learners are availing themselves of such offerings in increasing numbers, but primarily as a means to gain specific, in-the-moment skills or to pursue an area of interest, rather than because they see long-term value either from employers or in the ability to bundle such programs into a degree. Lack of employer recognition drives skepticism, while learners may simply be unaware of the option to stack non-degree programs into a degree.

Who are online learners?

Juggling multiple personal and professional responsibilities, online learners are hard-working adults who are determined to advance in their careers.



“The ultimate thing for me is the flexibility. If any program made me attend the night class, I would not have done it.”

Phillip, Superintendent certificate program

Respondents continue to strongly believe in the quality and value of online degree programs

90%

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

91%

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

“I’ve done 98% of my education online. I did a few semesters in person when I just had one child, and she was much younger. But obviously working full-time and having multiple children going to campus is just not really feasible for my lifestyle.”

Mikayla, BSN

Consistent themes

After 14 years of fielding this report, there are certain views and preferences that have stayed largely consistent.

Affordability is the top factor

Affordability is the top decision factor for online learners and has been for 12 of the past 14 years. Other top factors include accreditation and program concentrations offered. Also consistent with previous years is that learners are balancing quality with cost, with one third of students surveyed (33%) saying the tuition for their preferred program was higher than some, but the program's convenience, format, schedule, and/or location were ideal.

This year, household income and savings edged out federal loans for the top spot in terms of how learners are paying for their programs.

Sources of Funding:

Students use a range of sources to fund their degrees.

Household income/savings

48%

Federal loans

41%

Employer Tuition Assistance programs

27%

Federal grants

24%

Scholarships

23%

Flexibility is essential for working adults

Online learners, particularly those at the graduate level, tend to be working adults. Despite competing demands on their time, 76% of online learners successfully complete their programs without interruption. For those who needed to step out of their previous programs before completion, the most common reasons were unforeseen life events (28%), difficulty balancing work and school commitments (27%), and could no longer afford tuition cost and fees (19%).

Undergraduate students were much more likely to have stepped out (38%) than Graduate students (17%) or Certificates learners (23%). This may be due to relative level of maturity or to being more committed to a particular career path, with an associated clarity of purpose in pursuing their studies.

76%

of online learners successfully complete their programs without interruption

Learners pick modality first

Consistent with previous years, 8 in 10 learners say they chose modality first (online vs. hybrid or in-person) and 71% indicate that they would not choose to attend an institution if the program desired wasn't offered online.

8 in 10

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

71%

would not choose to attend an institution if the program desired wasn't offered online

Most learners choose local

Underscoring the importance of regional universities to their communities, the vast majority of online learners continue to live and/or work in the same state as their chosen school.

This year, 50% of learners (62% of Undergraduate students and 48% of Graduate students) live within 100 miles of their chosen college or university, while 73% of online learners live and/or work in the same state as their school.

73%

of online learners live and/or work in the same state as their school

Career advancement is the primary motivator

A whopping 94% say they are pursuing their online degrees for career-related outcomes. Moreover, 82% feel the online degree they earn is very important in helping them achieve their career goals, with 90% of online students who've graduated reporting a positive career impact that they attribute to their degree program.

Consistent with prior years, the biggest trigger to start their online program was personal motivation (61% said "I felt ready to start").



Emerging findings

01.

Increased interest in connection and academic support

The data remains consistent that online learners specifically seek out the online format to more effectively balance work, school, and personal commitments.

This year, we expanded the questions in this area to better understand the nuances of student preferences around in person and virtual connection opportunities.

What we saw was an increased interest in connection and community, whether with their professors or their fellow students. While this desire for engagement and support does not overshadow their need for flexibility, it does represent an area for consideration in the design of future online programs. Among other differences, such as reduced attention spans and a stronger desire to get the learning they need in the moment, modern learners are less rigid in their concept of modality.

We asked questions about both learners' desire to visit campus in person and their desire to log on for synchronous sessions. The survey results reinforce that online learners want affiliation with recognizable, brick-and-mortar campuses with the option to connect live or virtually. Further, while frequent campus visits and synchronous sessions are not desired, online learners appreciate knowing that they have ways to connect without sacrificing the flexibility they crave.

Looking across the questions about visits to campus and logging in for synchronous sessions, learners' reasons for both tend to fall into three categories: academic support, a feeling of connection and belonging, and attending graduation.

"I do want to go to the graduation and walk so my grandbaby can see his Gigi graduate."

Maranda, Master's in Education

Campus visits:

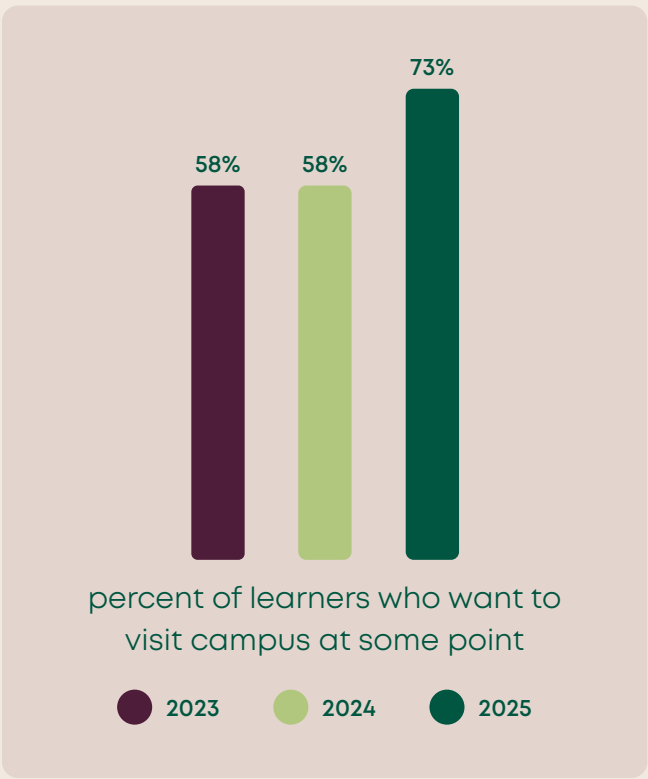
The biggest year-over-year change we saw across all questions was in the percentage of students who had an interest in visiting campus. Last year, 42% of learners said they did not plan to or had not visited campus, while this year, only 27% of students responded in this way, with Undergrads more likely to say they might visit their campus (80%) than Graduate students (73%).

When asked a follow up question about how often they would like to visit, some additional learners picked “never,” which is why 31% in the frequency of visits chart are listed as never wanting to visit campus rather than 27%.

Many online learners also desire connection and community in a virtual setting through occasional synchronous online sessions.

Two thirds of online learners would like to log in at a specific time at least once per course to join a required discussion or virtual lecture with their instructor and classmates. However, only 24 percent would like to do so on a weekly basis! This reinforces the fact that students are looking for more opportunities to connect with their peers and instructors but not necessarily on a high-frequency basis. And a sizable number of students (about one third) continue to want solely asynchronous programs.

The increased interest in community and connection, whether on-campus or virtually, aligns with other recent market surveys and data.



67%

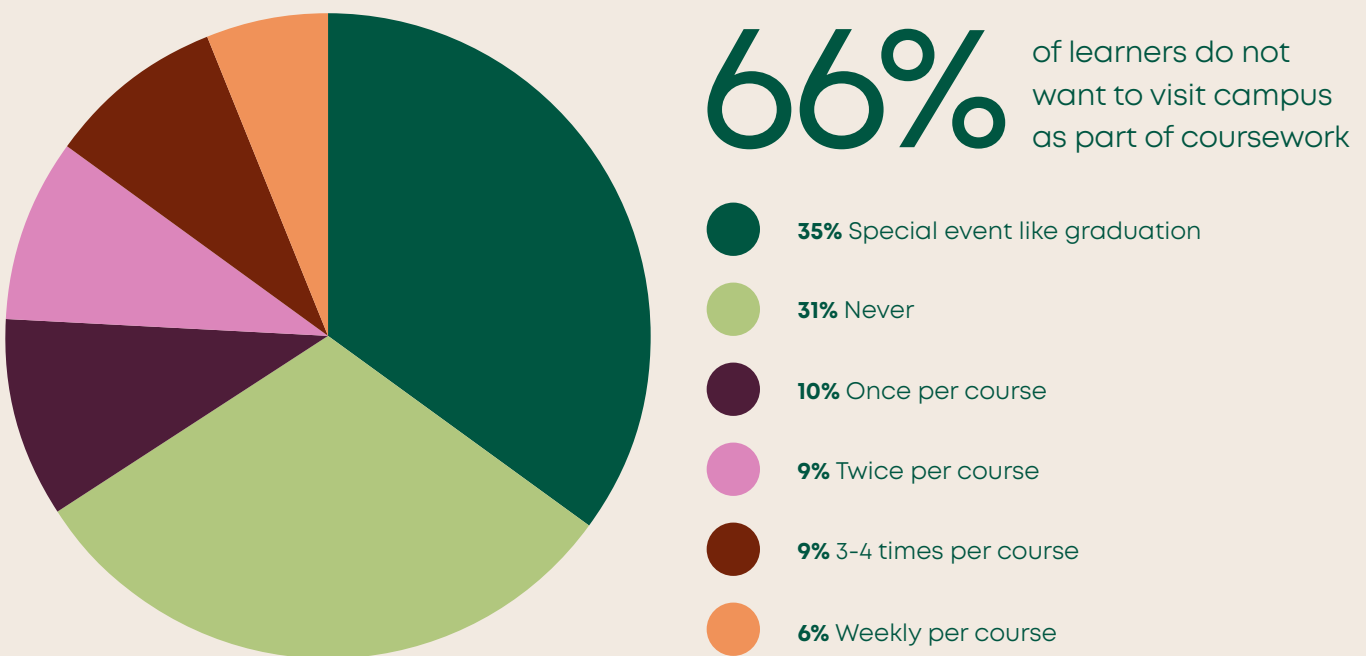
of learners want to log in synchronously at least once per course

¹In the 2024 survey, we asked about someone’s willingness to log in synchronously (at a specific time). To better understand preferences, we modified the question in this year’s survey to measure preference (“How often would you like to log in...”). The high-level results were similar to last year (2025: 67 percent would like to log in at a specific time at least once per course, 2024: 74 percent would be willing to log in at a specific time at least once per course). However, those wanting to log in at a specific time once per week were just 24 percent in this year’s survey. Last year, 51 percent said they’d be willing to log in a specific time once per week.

Frequency of visits:

The frequency with which learners indicate that they might visit campus indicates that while students desire more engagement, they still prioritize the flexibility of the online format.

When asked how often they would like to visit the campus of the program:



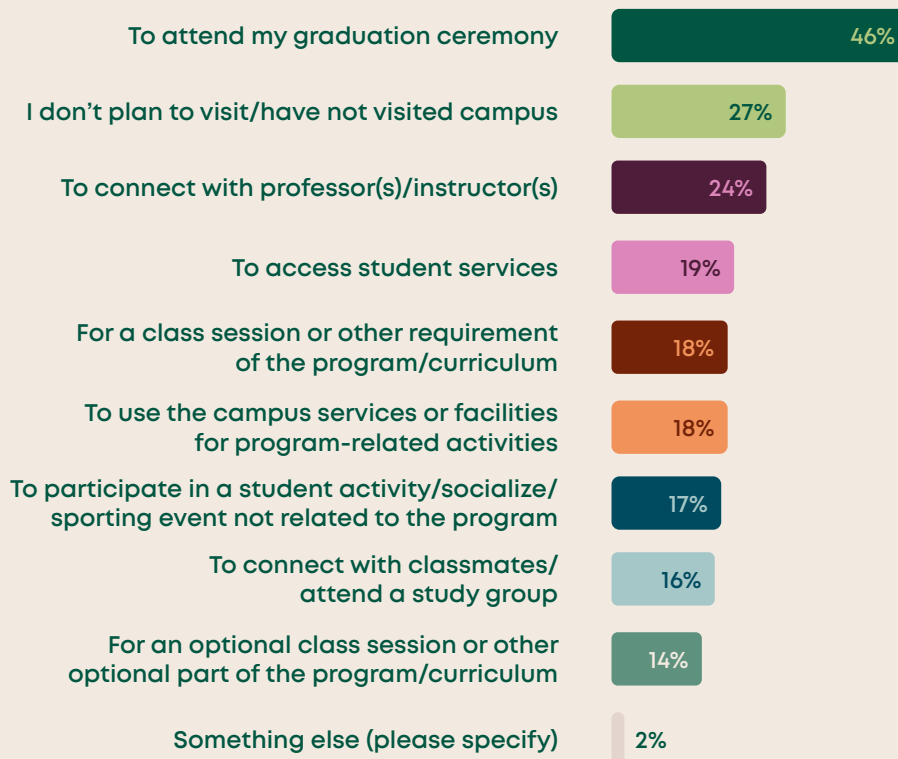
Aspiration versus reality:

The highest interest in synchronous sessions is among those still exploring programs.

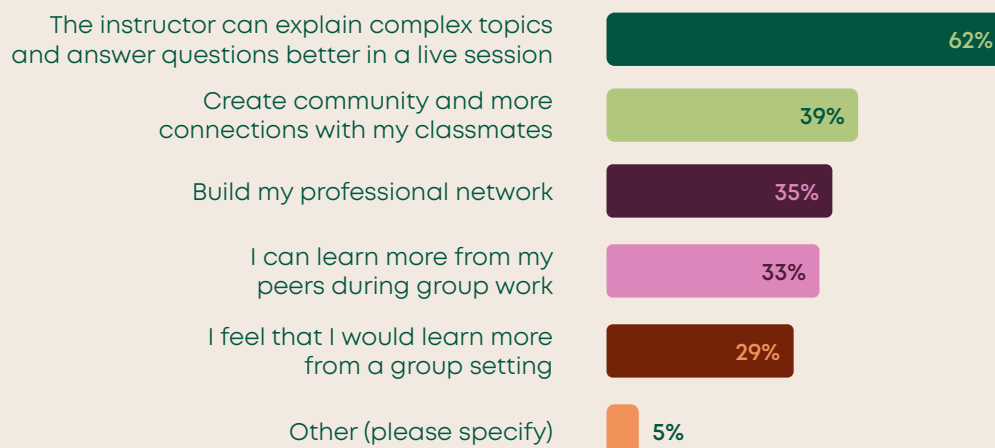
Among enrolled students, 39% never want to log in at a set time, vs. 23% of those not yet enrolled. This likely reflects the gap between what sounds interesting in theory vs. what is realistic once enrolled and juggling competing obligations.

When it comes to the reasons for visiting, graduation tops the list, underscoring the value online learners place on regional universities as trusted institutions, providing a stronger connection for students. Following that, the other reasons largely mirror the reasons for logging in synchronously — the top reason for both is to connect with professors or instructors to improve learning, followed by opportunities for connection with other students.

Reasons for visiting campus (among those indicating a desire to visit campus):



Reasons for logging on for a synchronous session:

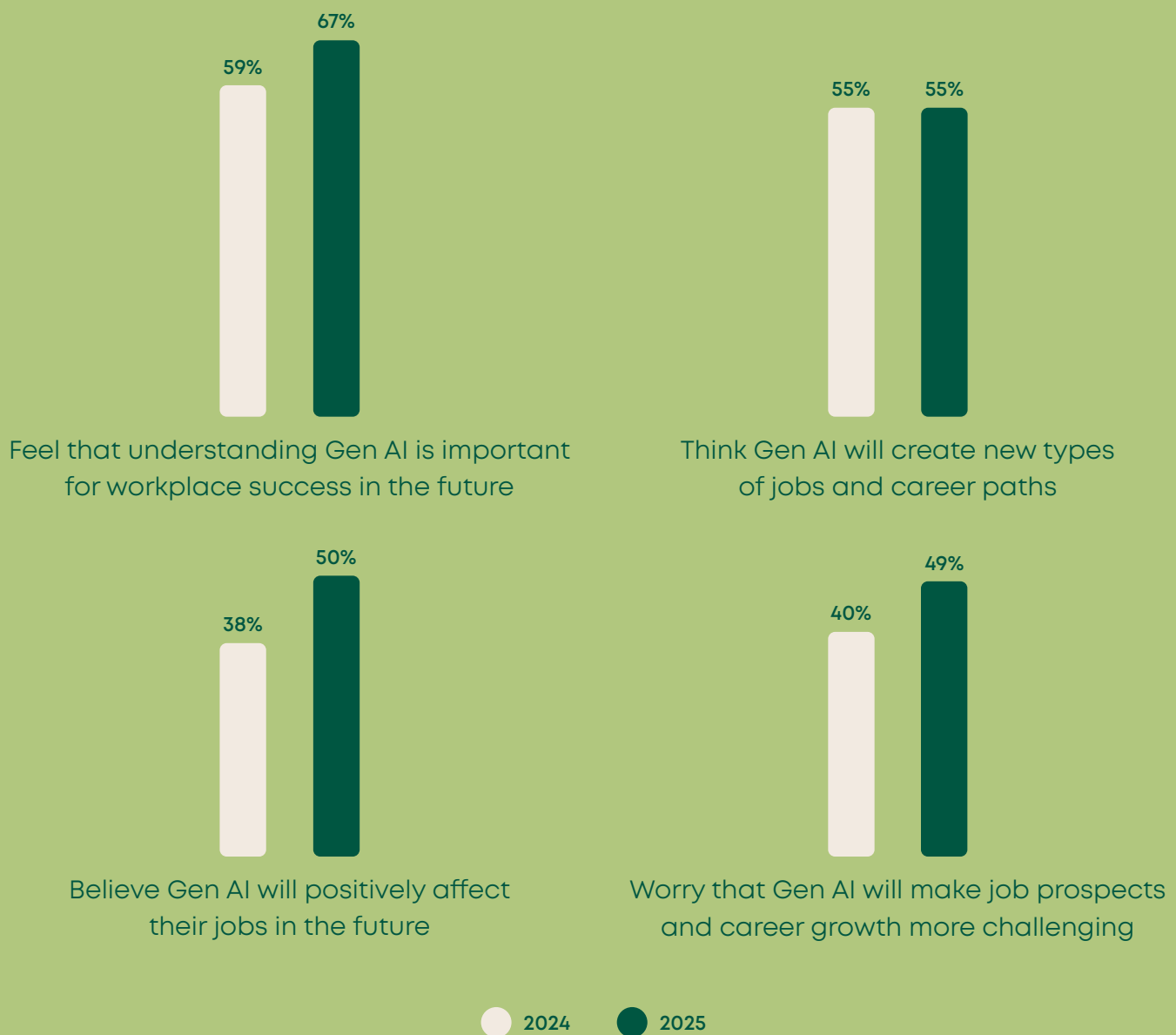


02.

Learners know Gen AI will change their jobs — and they need help

The demand for and integration of AI technology in the workforce is steadily increasing.

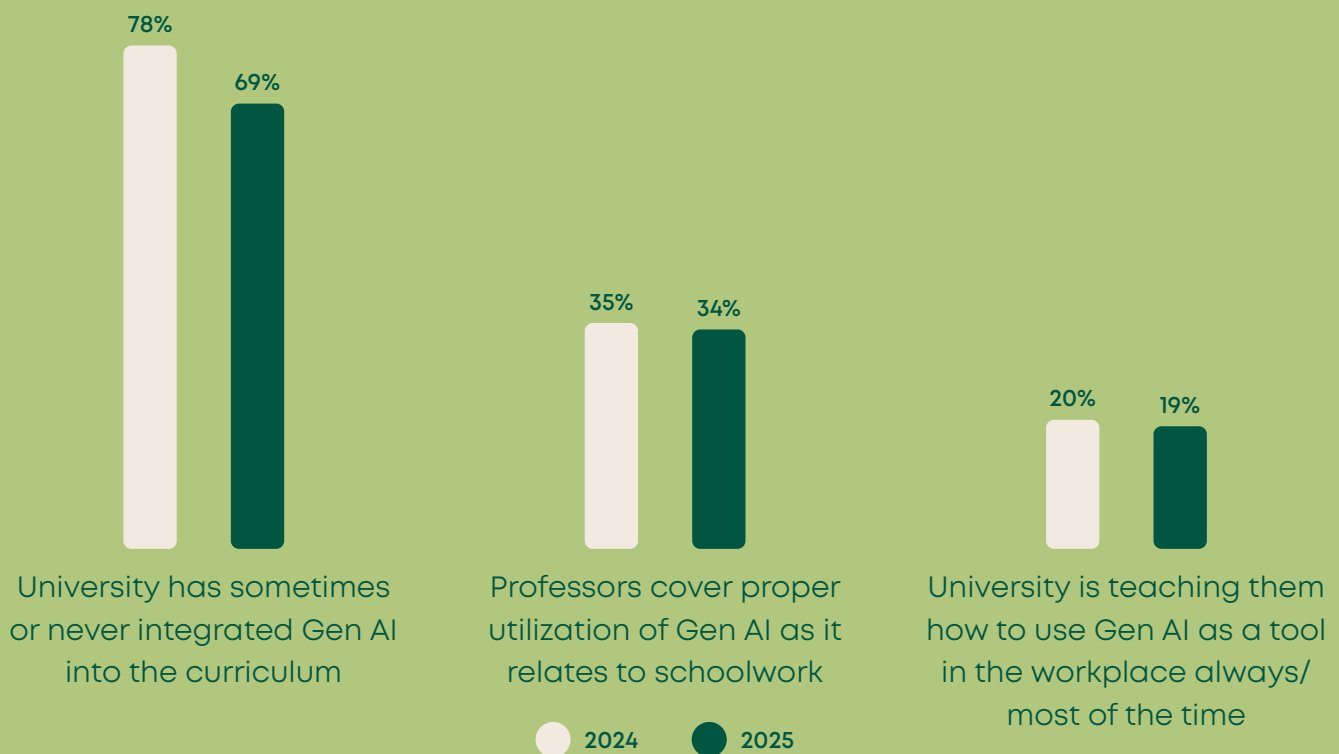
An understanding of AI will soon be necessary for jobs in most industries — according to a Pew Research study, 62% of Americans believe AI will have a major impact on workers generally¹. Learners increasingly see AI as transforming the workforce, with shifts in nearly all related questions.



69%

of learners report that their university has not integrated Gen AI into the curriculum yet

Despite overall agreement around AI's importance in the workplace, there is a discrepancy between the rate at which AI is being used in the workforce and its integration in education. While there has been modest improvement in some areas since last year, students expressed concern over a lack of formal AI education in their university programs, with 69% of students reporting that their university has not integrated Gen AI into the curriculum yet. On most dimensions, little progress has been made.



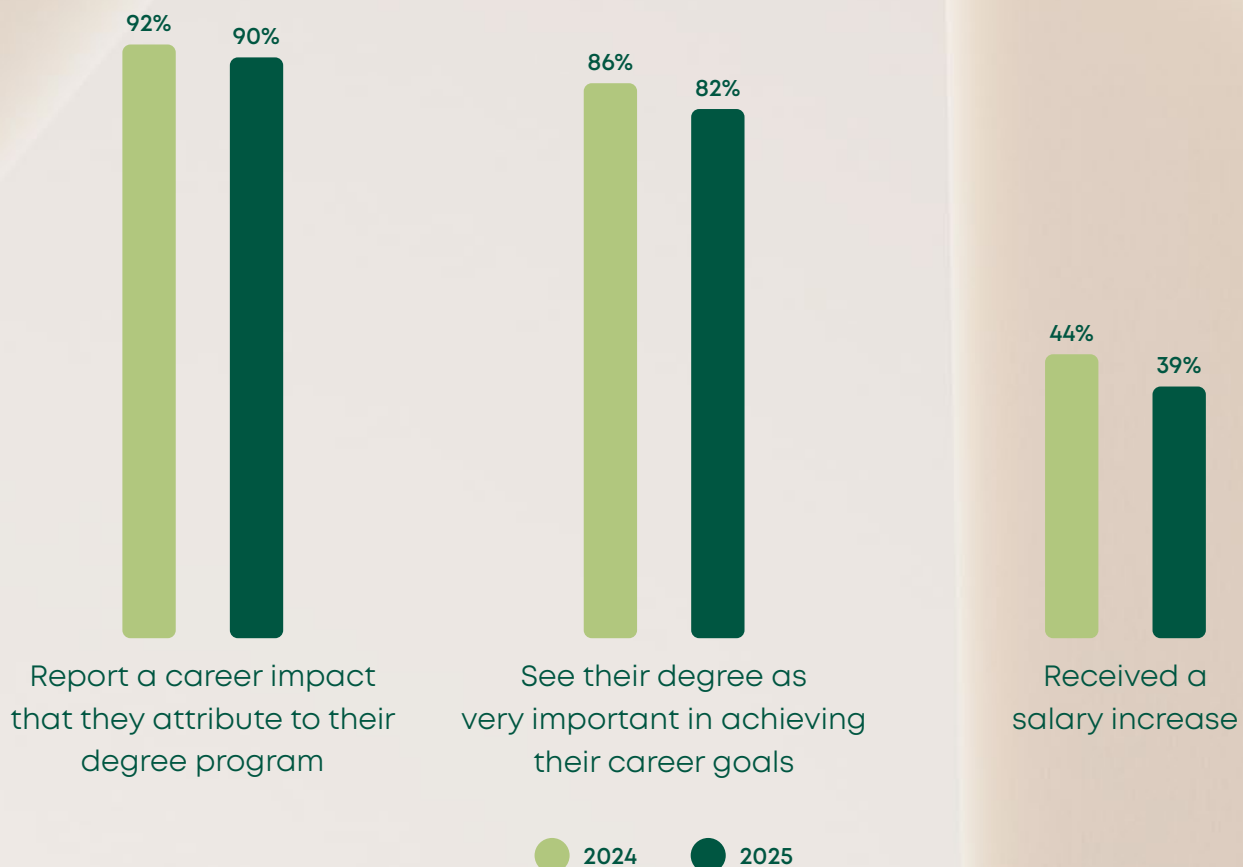


Limited use in program discovery:

AI is also very early on its journey as a program discovery tool. In their search for the right program, only 6% of respondents used ChatGPT or other AI technologies, continuing to rely instead on web search (45%) and word of mouth (32%). Nearly a third (29%) of students already knew about the school/program before starting their search, which reinforces the importance of local community and connections.

It's important to note that the percentage of learners using AI during the search process may be underreported, as they may not be considering features such as the "AI Summary" that they are leveraging within the context of a search engine.

Slight dips in graduate confidence and outcomes:



03.

Few job changes and more labor market jitters

Online learners pursue education to increase and complement their existing skill sets to support career advancement, especially internal promotions and salary increases. In fact, 94% of respondents (90% of Undergrads with 95% of Graduate students) pursue their online programs for career-related outcomes.

Practical motivations drive interest for online degrees and certifications, with achieving personal growth (60%), career advancement (59%), salary increase (51%), gaining marketable skills/certifications (44%), and broadening knowledge of a particular subject matter (38%) the top 5 reasons driving learners to pursue online credentials.

While the overwhelming majority of learners see, and believe in positive gains from their programs, this year we saw some signs of a softening job market in a number of areas.

For example, we saw a decrease in the proportion of learners seeking a complete career transition, from 29% last year to 23% this year.

We also saw a drop in those learners seeking online education as a catalyst to help them return to the workplace, down from 10% last year to 7% this year.

Also slightly down is the percentage of online learners who see their degree as very important in achieving their career goals (down from 86% last year to 82% this year). While these shifts are relatively small, given the timing that this survey was fielded (late January/February 2025), they may constitute early signs of broader labor market trends.

94%

pursuing online degrees for career-related outcomes

“[The growth of AI] does drive me to stay on top of my game academically and professionally. [I don’t want] to be replaced in the next few years.”

Nicola, Nurse Practitioner Certificate

Notably, this year, many also believe that degrees are table stakes now to drive career outcomes.



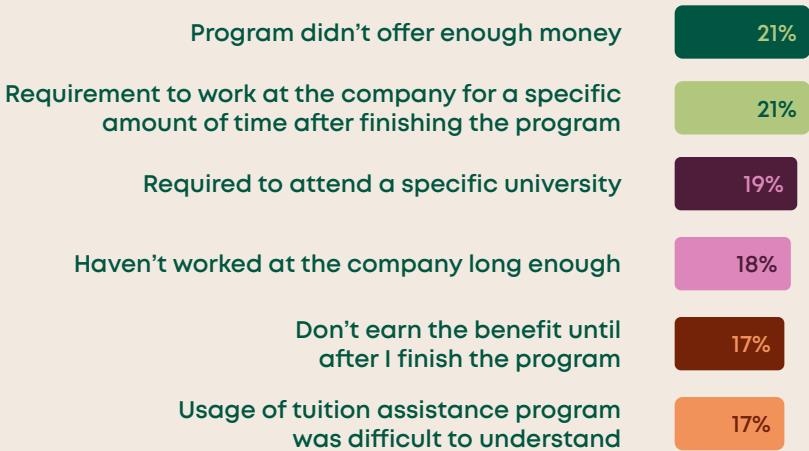
believe a college degree is necessary for career advancement in today's world



agree that a bachelor's degree is now expected by most employers and an advanced degree is necessary to improve career prospects

Also of interest, 40% of respondents reported having employer tuition assistance or reimbursement programs available to them, but two-thirds (67%) do not use this benefit. While there isn't one clear reason for their non-use, there are a number of areas where employers could find opportunities to improve uptake of these benefits.

Learners stated reasons for not using tuition assistance from their employer include:



04.

Interest but some uncertainty about non-degree programs

This year, to help inform our collective understanding of the ongoing learning needs of modern learners, we added an expanded section on lifelong learning. Most students express interest in continuing learning after they finish their current program.

Consistent with last year, nearly half of learners are very likely to attend future online programs, with 48% indicating an interest in future online degree programs and 48% also indicating interest in future online non-degree programs.

Speaking back to the steady state finding that learners pick modality first, online learners were much less likely to see themselves in future in-person programs,

with only 27% indicating they were likely to participate in a future on-campus degree programs and or an on-campus non-degree program.

Undergraduates indicate higher interest in enrolling in an online degree program (62%) while Graduate students (49%) are more likely to enroll in an online non-degree program to further their education.

Half (51%) of surveyed individuals have already participated in non-degree programs and 56% express interest in pursuing such credentials online, an increase from 48% in 2024. This year, we asked additional questions about the types of alternative credentials learners may be interested in.

Reflecting a strong demand for practical, career-focused learning, the highest-rated options include:

58%

Professional certificates

44%

Trade skills certifications

42%

Industry certifications

The primary motivators for pursuing alternative credentials include skill acquisition for career advancement (58%) or personal knowledge expansion (56%). When it comes to deciding whether to pursue an alternative credential, individuals prioritize career alignment (77%), cost (73%), completion time (70%), and employer credibility (69%).

At the same time, some learners remain hesitant about the value of alternative credentials, with 40% feeling they are unnecessary for their goals and 27% believing a traditional degree is a better path. Still others have concerns, with 39% saying better employer recognition of such programs would increase their interest in them, and 52% indicating lower cost would do so.

Stackable credentials are still not well understood

There is an opportunity for universities to build awareness around the potential to stack certificate programs toward degrees.

Only 11% of learners cited the ability to stack credentials toward a degree as a top reason for their interest in such programs. In addition, when looking at how well learners think alternative credentials support different goals, stacking them to a degree is significantly lower than the other stated potential reasons.

As job skill requirements continue to evolve and learners increasingly seek opportunities to upskill and reskill, universities have a unique opportunity to expand awareness of stackable non-degree programs as pathways toward a full degree.

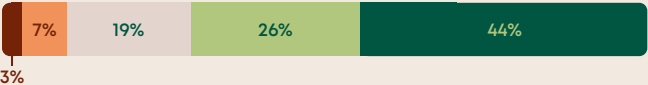
Similarly, the ability to stack programs to a degree was the lowest rated decision factor for learners:

How much do you think alternative credentials are a fit for the following uses or reasons?

Provide new skills/knowledges for a career change



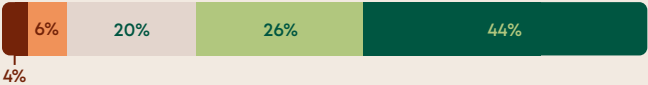
Help with quick skill acquisition



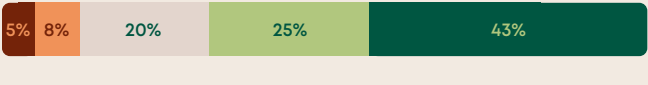
Remain competitive in my current career



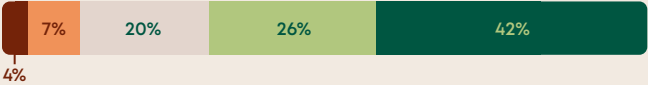
Support for technical or specialized fields



Increase knowledge for a pay increase or promotion



Become a subject matter expert



Path towards earning a degree



When deciding whether to pursue alternative credentials, how important are the following factors to you?

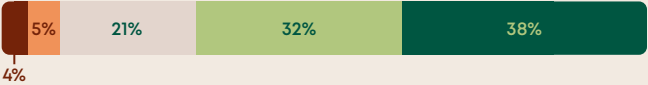
Alignment with my career or academic goals



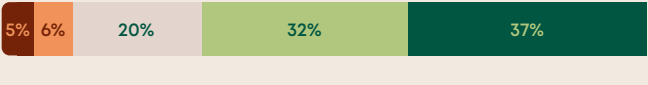
Cost of the credential



Time required to complete the credential



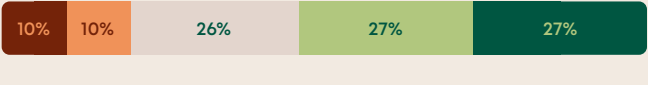
Credibility and acceptance among employers



Reputation of the issuing platform or institution



Opportunity to stack credentials toward a degree



Not a good fit
Slightly good fit
Moderately good fit
Mostly a good fit
Very good fit

Takeaways for university leadership

Affordability, ROI, and flexibility:

- Tuition for online programs should prioritize affordability without compromising value, as students consider ROI in both absolute dollars as well as return on investment.
- Students choose online learning for its flexibility. Keep flexible programming top of mind and give students options that allow them to choose what works best for their schedule, including variable course sequencing options that support the need of some working adults or parents to step out a certain times of year.

Employer connections:

- Universities have an opportunity to collaborate with employers to increase the uptake of tuition reimbursement programs.
- 39% of students indicated that better employer recognition of alternative credentials would increase their interest. Identify inputs to design programs that best align with the skill development for talent among employers in your region.

Learner connection and support:

- Offer more optional online opportunities for students to engage with professors and other classmates for academic support, such as virtual office hours.
- Provide more ways for students to connect with one another to form a stronger sense of community.
- The motivations differ for graduate and undergraduate students, so tailor opportunities for engagement.

Gen AI:

- Integrate lessons on Gen AI into courses, ensuring that learners understand how AI will impact their industry.
- Provide practical instruction around how Gen AI will play a role in the future of their career and help ensure students know how to use AI in their day-to-day jobs.

Lifelong learning:

- Highlight pathways for stacking alternative credentials to traditional degree programs to help learners see that they aren't an either/or proposition with degrees.
- Identify ways to maintain relationships with students and build continued pathways beyond the first degree.



Conclusion

Over 14 years of research, online learners have told us who they are, what they value, and what they need to succeed. Many of those fundamentals — affordability, flexibility, trust, and career relevance — remain remarkably consistent. And yet, this year's report reveals meaningful shifts that signal the rise of a new kind of learner — one defined more by mindset than modality.

The modern learner defies traditional categories. They are increasingly modality-agnostic, often working and parenting, and accustomed to technology shaping every aspect of their lives. They expect education to do the same. They seek programs that offer flexibility and relevance, but increasingly, they also want support, connection, and a seamless experience — one that meets them where they are, whether that includes campus visits, synchronous engagement, or career-aligned learning pathways.

At the same time, the core motivations and needs that have long guided online learners remain steady. They continue to seek affordable, flexible, and career-connected programs that fit within the realities of their lives. They pursue education to advance in their current roles, earn more, and create lasting stability for themselves and their families.

Most still choose programs close to home. Online learners are practical, purposeful, and values-driven — and they want institutions they can trust to deliver on their goals.

What's changing is the context. Learners are navigating economic uncertainty, AI's impact on the workforce, and a complex credentialing landscape. They're asking for clearer guidance, greater adaptability, and a better understanding of how non-degree pathways and lifelong learning stack toward larger goals.

What we don't yet know is how significant any of these changes will be, what macro factors may impact choices learners make in the future, and how new technologies will impact their approach to their learning and their careers.

In a time of unprecedented technological and social change, and as the boundaries between in-person and online, degree and non-degree, and career and education continue to blur, institutions have a choice: stay the course, or evolve alongside the learners they aim to serve. We hope that such research will help support universities in making informed decisions as to how to best position themselves for continued relevance to learners.



Methodology and references

Methodology

The study was conducted in two phases during the first quarter of 2025.

PHASE ONE: QUANTITATIVE SURVEY

Risepoint collected survey responses from **n=3,778** 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=1,889**) came from an internal sample of prospective, current, and recently graduated students at Risepoint-supported institutions. The other half (**n=1,889**) 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 the previous year's survey 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.

PHASE TWO: QUALITATIVE INTERVIEWS

To complement the survey data, we conducted **n=43 one-on-one interviews** with currently enrolled students at Risepoint-supported institutions.

These interviews provided rich, contextual insights that deepened our understanding of online learners' motivations, challenges, and goals.

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 2023, **5.07 million** students in the U.S. were enrolled exclusively in distance education courses¹. Based on this population estimate, a sample size of 3,778 yields a **margin of sampling error of approximately $\pm 1.6\%$ at a 95% confidence level**.

(1) National Center for Education Statistics-Integrated Postsecondary Education Data System, Fall 2023 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=3,778) 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.

References

1. www.pewresearch.org/short-reads/2023/11/21/what-the-data-says-about-americans-views-of-artificial-intelligence/

