2024

Voice of the Online Learner

Risepoint

Contents

Introduction

Voice of the Online Learner, now in its 13th year, has a strong history of focusing on online learners' perceptions, behaviors and preferences. It mirrors our commitment to bring our expertise to guide the success of online programs for the universities we serve. With that commitment as our north star, we've continued the report's legacy at Risepoint, and we're excited to share the results with you.

This year's survey demonstrates that online learning is highly valued, and the outcomes are compelling. The results also show that most online learners are working adults who must manage work and family obligations in addition to their education. For universities who design programs with online learners in mind, the future is ripe with opportunities.

Key Findings

01

Online learners are fundamentally different

These adults have specific needs and goals that make online learning *the* way to continue their education.

02

Career advancement is the primary motivator

Whether in a degree or non-degree program, students see higher education as a path to new jobs, promotions, increased salaries and expanded career opportunities.

03

Affordability and flexibility reign supreme

The vast majority of online learners are working adults who need to juggle work and family obligations alongside their education. As such, most students are cost-conscious, want to see strong ROI on their financial and time commitment, and need to have flexibility in class schedules and timing of coursework to accommodate life's demands.

04

Local matters, even online

Most students still want to pursue their education near where they work and/or live, and familiarity with a brick-and-mortar campus (rather than a strictly online university) is important. But being commuting distance (100 miles or less) has gone down in importance because fewer students have a desire for any on-campus program components. For most, being in the same state addresses their needs.

05

Interest in upskilling is lifelong

Online learners largely see learning as a way to keep their skills and employability current and show strong interest in pursuing additional online programs in the future. Served well, an online learner could come back for additional offerings over time.

01

Online learners are fundamentally different

For this year's report, we surveyed almost 3,500 online students — 2,460 students from Risepoint-supported programs and 1,000 from other online programs to ensure a balanced sample. Of those 3,460 students, we gathered feedback across the spectrum of participation — from initial consideration to program completion.
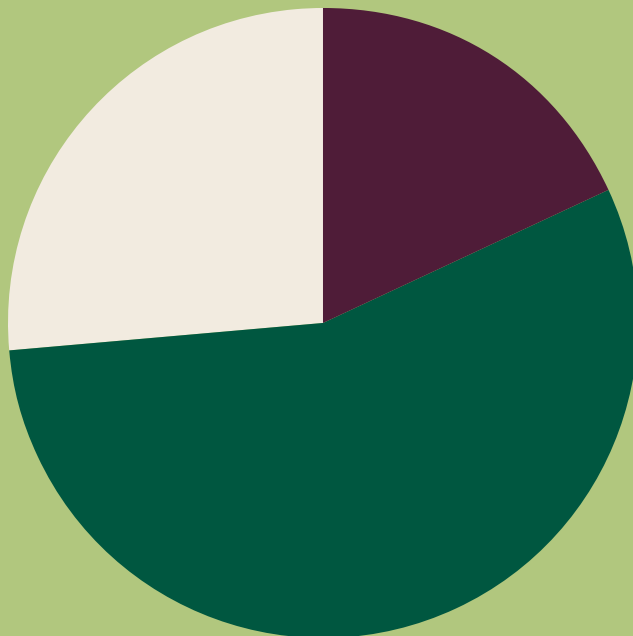
55.4% Currently enrolled in an online program

26.6% Currently looking and have firm plans to enroll in an online program in the next 12 months

17.9% Graduated from an online program within the last 12 months

Age

Weighted average	38
Undergrads	37
Graduates	38
Certificates	42

Race

69% white, 31% people of color

Household income

Weighted average	$76K
Undergrads	$61K
Graduates	$86K
Certificates	$85K

Gender

71% female, 29% male, 1% other

Online students believe strongly in the value of an online degree, both for themselves and to their employers.

90%

Believe that the quality of an online degree is comparable to or better than an on-campus degree
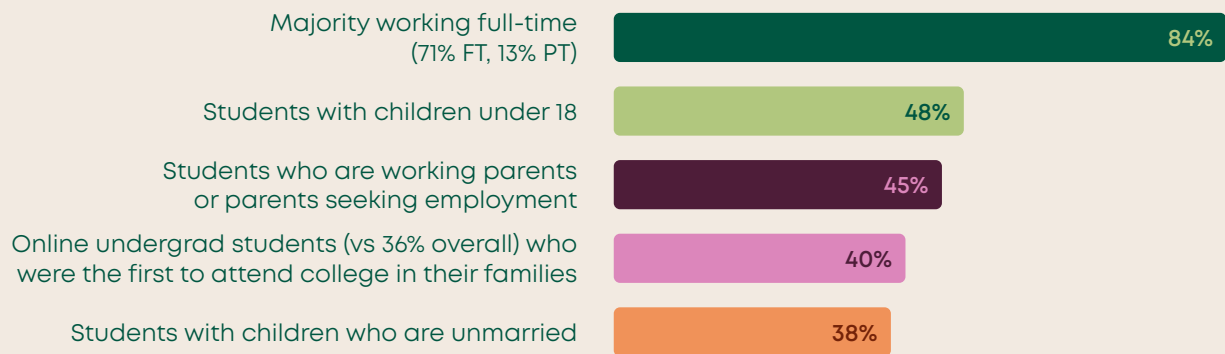
88%

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

A Tricky Balancing Act

Juggling work and family obligations, online learners are focused, tenacious and determined. A significant portion of respondents are first-generation college students.

Category	Percentage
Majority working full-time (71% FT, 13% PT)	84%
Students with children under 18	48%
Students who are working parents or parents seeking employment	45%
Online undergrad students (vs 36% overall) who were the first to attend college in their families	40%
Students with children who are unmarried	38%

"My parents and I are immigrants from Guatemala. As an immigrant, you are not always viewed in the best light, so education has been a motivator for me to keep bettering myself. My mom always said, **'They can take your car or money, but they can't take your education.'**"

Ana, Master of Education in Educational Leadership

Given the complexity of their lives as working adults, some students have had to step away from previous attempts to further their education. When asked if they had previously taken classes or attempted to complete the same degree they are currently completing, 22% of all students answered yes – 36% of undergraduates, 12% of graduate students and 26% of certification students previously took classes toward that same degree but did not complete them.

The vast majority (70%) who left a previous program were enrolled less than a year (44% less than 6 months), and often it was the difficulty of juggling multiple obligations that got in the way.

Step outs cited challenges with unforeseen life events (35%), balancing work and school commitments (25%), cost (23%) and mental health challenges (20%).

Online increasingly means asynchronous

Online programs tend to be the modality of choice because they offer the flexibility and balance that online learners require, and learners' desire for fully asynchronous programs has increased. Almost 83% of learners (vs. 71% last year) indicated little desire to visit the physical campus or even to log on for synchronous online classes.

Campus Visit

Fully online program without a required on-campus visit	Visiting campus for a short on campus requirement
82.7%	17.3%

Course Format

Asynchronous learning	Synchronous learning
76.0%	24.0%

Completion time

Take more than one course at a time for faster completion	Take one course at a time for better school/life balance
56.7%	43.3%

Course Length

Completing one course at a time in 8-weeks	Completing two courses at the same time in 16-weeks
68.4%	31.6%

60%

said if their program were not offered online at their school of choice, they would find a different school with the program, a slight increase from last year's 57%.

Takeaway for university administrators:

Many students would not be in school if online options did not exist. This suggests strongly that online classes are mostly additive and are not taking students away from on-campus class settings. The offerings are attracting, for the most part, two entirely different sets of students.

02

Career advancement is the primary motivator

An astounding 95% of online learners indicated that they were pursuing their degrees for career-related outcomes, an increase over last year's already impressive 87%. A significantly smaller proportion of learners are interested in a complete career transition (29%) or in returning to the workplace (10%)

95%

Pursuing degrees for
career-related outcomes
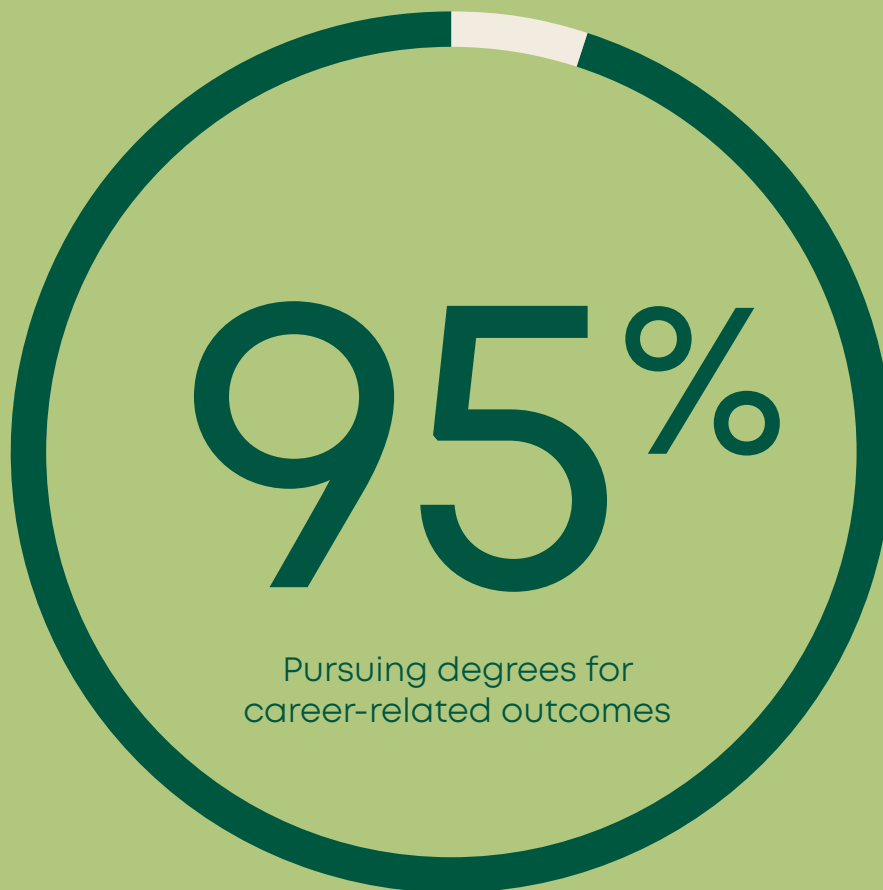
Personal Motivators

Personal drivers are also important motivations for many. For first generation university students, **"making my family proud"** and **"setting a good example"** helped drive their success (38% vs 33% overall). Similarly, students who are parents often cite their children as motivation.
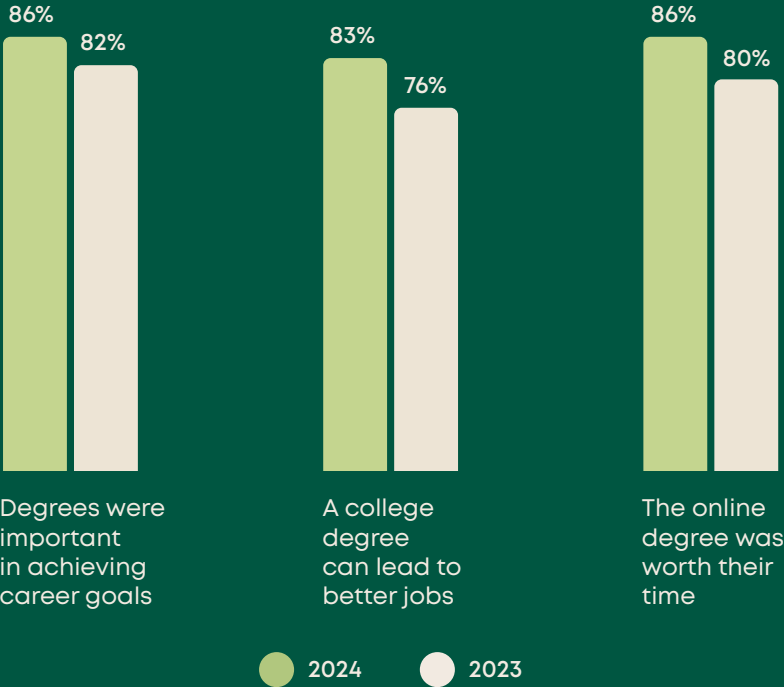

"I have tried to be a good role model for my daughter — showing her that you never stop learning and you're never too old to pursue an interest at whatever stage in your life."

Tyler, Master of Public Health

The catalysts for starting their online program were a combination of affordability, availability, accessibility, and personal readiness. Implicit in their personal readiness is the influence of workplace experience, such as the encouragement from a boss or the frustration of not getting a job. The overwhelming majority of respondents (86%) feel their degree is important to help them achieve their career goals, and 83% believe a college degree leads to better jobs.

Scores on this topic increased across the board for all students compared to last year:

	2024	2023
Degrees were important in achieving career goals	86%	82%
A college degree can lead to better jobs	83%	76%
The online degree was worth their time	86%	80%

"I was not being considered for certain roles because I couldn't check the box of advanced degrees so I just wanted to remove that obstacle by getting a degree."

Jacob, Master of Business Administration

Critically, these perceptions are backed up by real-world results:

92%
Graduates seeing tangible career outcomes

36%
Had more confidence in the workforce

26%
Got new jobs

43%
Had more marketable skills

44%
Saw salary increases

21%
Got promotions

Non-traditional educational alternatives, such as certificates and industry certifications, are also seen as career enhancers. Their appeal is consistent to last year's responses with 61% of learners being open to these options for tailored skill development and custom credentialing pathways.

03

Affordability and flexibility reign supreme

Program discovery happens in a wide range of ways, but decision making follows very consistent patterns. Online learners learn about programs in a variety of manners, including Web search (45%), word of mouth (35%), and employer recommendations (11% overall). Importantly, only 32% of students know about the school they wanted to attend at the beginning of the process.

This year saw a significant increase in the importance of affordability as a decision factor, from 77% to 86%. Quality and credibility remain critical, but reputation has dropped in importance, from 63% last year to around 50% this year.

This year's key decision factors are:

Factor	%
Cost (extremely/very important)	86%
Accreditation	84%
Program concentrations	75%
Time to degree completion	68%

Affordability was likewise the top factor for choosing a program with 38% selecting the lowest tuition among programs evaluated. This is a sizable increase of over 29% compared to the same question last year.

"I needed a program that was fully online for convenience but fully certified and economical too."

Vickel, Education Specialist in Educational Leadership, Principalship

> "I did want a school that is attached to an actual brick & mortar school, and I didn't want a 'for-profit.'"

Theresa, Master of Public Administration, Nonprofit Management

**Overall methods of payment:**

Federal Loans	**48%**
Personal Income	**44%**
Federal Grants	**30%**
Scholarships	**24%**
Employer Tuition Assistance Programs	**21%**

The increase in importance of accreditation reflects students' desire to seek assurances for quality and legitimacy in online programs. Some are suspicious of low-cost programs and will seek information about the school to gain confidence in the program (e.g., accreditation, graduation rates, faculty qualifications, and job placements). Often, knowing that a school has a brick-and-mortar campus provides them comfort about the program's "legitimacy."

Prior to even beginning a discovery process, however, prospective students weighed online vs on-campus programs, and cited flexibility and convenience as the top reasons they chose online:
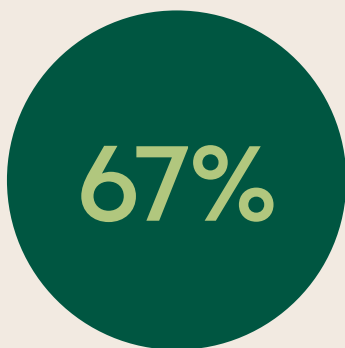
67%
Better balance taking classes with work and/or personal obligations
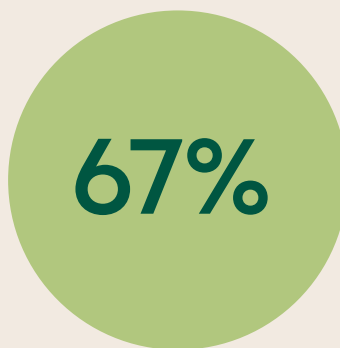
67%
Flexibility of taking classes from wherever I want

60%
Convenience of taking classes whenever I want

04

Local matters, even online

Geographical proximity continues to be a factor in decision making, and it remains important for most students to be able to pursue programs from schools within their state, but the actual physical proximity to campus is less important than it has been in years past, driven by a decreasing appetite for campus-based learning.

A strong 70% live and/or work in the same state as their school, but the percentage who live within 100 miles of campus decreased significantly, from 70% last year to 57% this year. And while students have little desire to be on campus, respondent comments indicated that licensure or certification requirements are important considerations for attending universities in their state.

- 57% chose a school within 100 miles of where they live
- 42% have not (current students) or do not plan to (prospective students) visit campus
- The most frequently cited reason for visiting campus was to attend graduation (37%)

While respondents have little interest in going to campus, 74% expressed willingness to log in synchronously once or more per course to participate in online discussions or lectures and to seek instructor guidance and peer interaction. The majority (66%) of those want to spend that time with the instructor to explain complex topics and/or answer live questions. Others want to build community and connection with classmates (41%), build a professional network (37%) and learn from peers during group work (33%).

"Staying in Texas was my preference just because a lot of education requirements differ based on what state you are in."

Caroline, MEd, Special Education with Educational Diagnostician Certification

70%

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

05

Interest in upskilling is lifelong

Many online learners see themselves as life-long students and want to continue their education journey.

The appeal of non-traditional educational alternatives, such as industry certifications, non-credit certificates, and trade skills certificates, continues to be strong, with 61% of learners open to these options for tailored skill development and custom credentialing pathways.

Students believe that certificates can help them achieve career goals at a lower cost and more quickly than a full degree program. They also value certificates for helping give them knowledge they need for testing requirements.

48%

of all online learners expressed a strong inclination to pursue additional programs after they complete their current degree program (61% of undergrad students, 39% of graduate students, and 49% of certification students)

Reasons for interest in certificate programs:

Reason	Percentage
Secure a pay increase	62%
Gain new skills	56%
Remain competitive in their careers	54%
Become a subject matter expert	51%
Certificates that can culminate in a degree	44%
Certificates that earn entry into a degree program	38%

Looking to the Future

Students are concerned about AI and seeking guidance

Industry demand shows there is a clear need for AI-focused education, yet generative AI remains largely unaddressed in most online coursework and programs today according to our survey results. Almost 80% of student respondents (78%) said their university had not integrated generative AI technology into the curriculum. Only a third of students (35%) say their professors cover proper utilization of AI in school / educational studies, and an even smaller portion of students (20%) say their professors have encouraged its use.

Generative AI is still new on the scene, and its full implications and utilization have yet to be realized. As of now, student views on AI's impact on their future employment remain polarized:

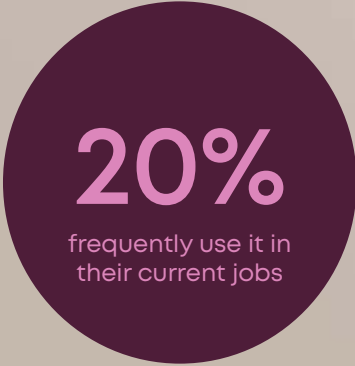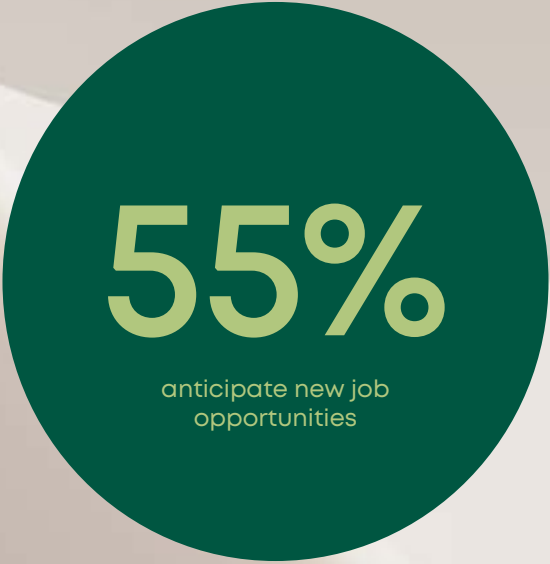## 38%
believe AI will affect their jobs positively

40%
believe AI will affect their jobs negatively

80%
agree that it will impact their careers in some fashion

55%

anticipate new job opportunities

59%

agree it's going to be important in the future

20%

frequently use it in their current jobs
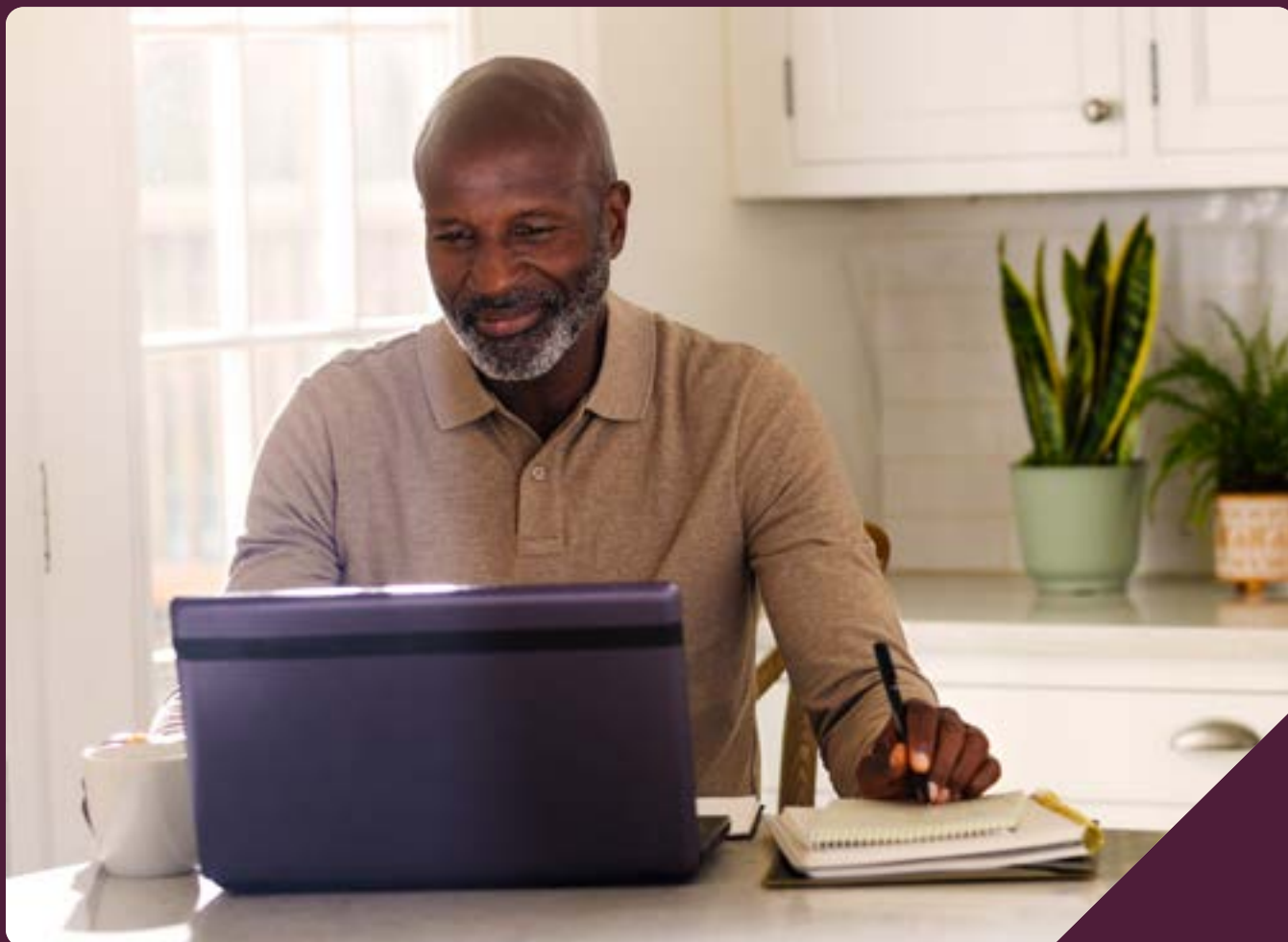
Opportunities for Educators

FINDING: Online learners want online programs to help them advance their careers

- Design curricula that directly align with career advancement and skill development to meet students' professional goals

- Build strong employer relationships to help align programs with high-demand job markets

FINDING: Affordability is the most important decision factor

- Evaluate pricing on online programs to keep tuition as affordable as possible

- Facilitate access to financial aid by increasing scholarships, grants, and flexible payment options

FINDING: Online learners require more flexibility

- Offer flexibility in course scheduling, including allowing students to complete one course at a time and reducing course length to 8 weeks and prioritizing fully asynchronous experiences

- Provide credit for prior learning and/or experience

FINDING: Online learners need different types of support

- Provide mentorship and academic advising for first-generation students

- Implement resources for working parents, including childcare information

FINDING: GenAI's impact will be felt everywhere, but online students don't feel prepared

- Train faculty on genAI tools

- Establish ethical use policies for genAI in the educational environment

Methodology

The study was conducted in two phases. The first phase (Q4 2023) involved 24 one-on-one interviews with students currently enrolled in a degree program at Risepoint client institutions to understand their motivations, preferences, and experiences when considering and enrolling in online degree programs. In the second phase (Q2 2024), Risepoint received survey responses from more than 3,400 individuals across the US. Respondents were at least 18 years of age, had a minimum educational credential of a high 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. Graduate students represented 17% of the total college population in the fall of 2021 but 25% of the online population(1). The sample for this survey was weighted to make up approximately 60% graduate students, ensuring a large enough sample for meaningful conclusions for this segment of the online learning market. We combined undergraduate and graduate data unless there were noteworthy differences. The sample consisted of 3,460 respondents comprised of a national external panel of 1,000 responses and an internal survey of 2,460 prospective, current, and recently graduated students enrolled at Risepoint client institutions.

To recruit for the external sample, a panel of consumers from across the US 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 participated in or were planning to enroll in 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 a Risepoint client institution was 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, 4.99 million higher education students were enrolled in courses exclusively delivered via distance education.(1) Based on these findings, a sample of 3,460 represents an approximate sampling error of +/-1.67% 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's because the question allowed respondents to choose more than one option. All questions were answered by the full sample of 3,460 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.

References

(1) National Center for Education Statistics-Integrated Postsecondary Education Data System, Fall 2022 Enrollment

About Us

Risepoint (formerly Academic Partnerships) is an education technology company that provides trusted partnership and expertise to more than 125 universities and colleges. We primarily work with regional universities, helping them develop and grow their high-ROI, workforce-focused online degree programs in critical areas such as nursing, teaching, business, and public service.

Risepoint is dedicated to increasing access to affordable education so that more students, especially working adults, can improve their careers and meet employer and community needs.

Learn more at **Risepoint.com**.