



# THE FORCES SHAPING

Education

**Australia's Tertiary  
System & Students**

# THIS REPORT WILL COVER...

## Act 1

### FORCES SHAPING AUSTRALIA'S TERTIARY SYSTEM (UNIVERSITIES & VET)

Australia's tertiary education, encompassing Universities and Vocational Education & Training (VET), face a perfect storm of transformative pressures. Emerging forces are redefining student expectations and opportunities, while political and technological shifts add complexity to the sector's landscape.

## Act 2

### NEEDS SHAPING AUSTRALIA'S TERTIARY STUDENTS (UNIVERSITIES & VET)

Today's students demand sophisticated understanding from institutions. To thrive, they must grasp evolving motivations and diverse needs, influenced by learning stages, methods, and overall educational drive.

Research conducted by The Growth Distillery, 2025.

The survey was conducted between 3–19 February 2025, with a total of 3,729 respondents aged 16 and over approaching higher education, comprising both parents and students.

# ACT I: THE FORCES SHAPING AUSTRALIA'S TERTIARY EDUCATION SECTOR

There are 5 forces shaping Australia's Tertiary Education system today, including;

01	<b>TOMORROW'S GLOBAL TALENT RACE</b>	<ul style="list-style-type: none"><li>The global job market is rapidly evolving, demanding new skills and redefining future roles. This demands our education system evolves to ensure we remains competitive for tomorrow's jobs.</li></ul>
02	<b>AI &amp; THE REINVENTION OF LEARNING</b>	<ul style="list-style-type: none"><li>AI is redefining knowledge, value, and education, transforming how skills are acquired and applied globally.</li></ul>
03	<b>POLITICAL PRESSURES THREATEN GLOBAL STANDING</b>	<ul style="list-style-type: none"><li>Migration and housing have prompted new regulations, causing short-term uncertainty but aiming to foster long-term sustainability.</li></ul>
04	<b>DOMESTIC DEMAND SHIFTS BEYOND THE DEGREE</b>	<ul style="list-style-type: none"><li>A new wave of learner expectations is redefining Higher Education and Vocational Education &amp; Training role, focusing on flexibility and personal growth.</li></ul>
05	<b>STUDENTS' ROI RECKONING</b>	<ul style="list-style-type: none"><li>The value proposition of tertiary education is under intense scrutiny, rising costs and commitments prompting students to question their return on investment.</li></ul>



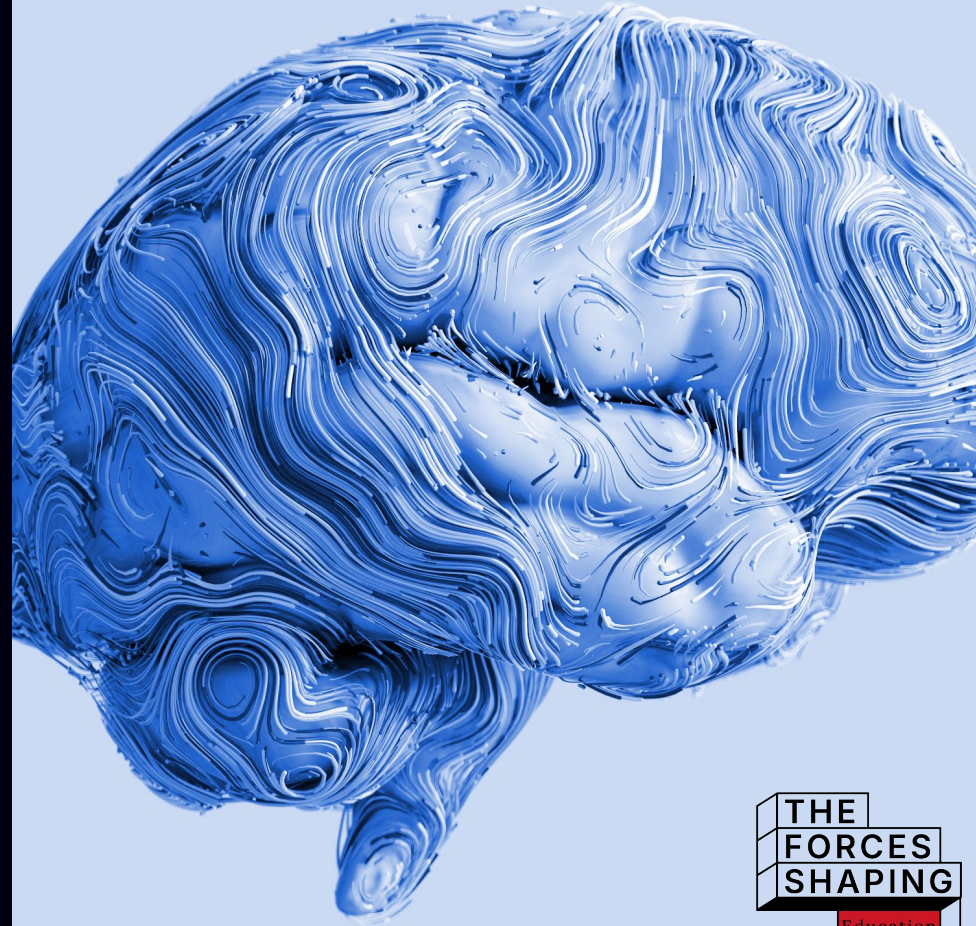


# FORCE 1: TOMORROW'S GLOBAL TALENT RACE



# FORCE 1: IMPLICATIONS FOR AUSTRALIA'S TERTIARY SECTOR

THE GLOBAL JOB MARKET IS RAPIDLY EVOLVING,  
DEMANDING NEW SKILLS AND REDEFINING FUTURE  
ROLES. THIS WILL DEMAND OUR EDUCATION SYSTEM  
EVOLVES TO ENSURE AUSTRALIA REMAINS  
COMPETITIVE FOR TOMORROW'S JOBS.



# FORCE 1: TOMORROW'S GLOBAL TALENT RACE

Australian students face uncertainty as the workforce transforms by 2030. With a net gain of 78 million jobs globally, Australia may not benefit directly, unless we have the skills to compete.

67%

## FACING AN UNCERTAIN FUTURE

of Australian current and potential tertiary students perceive the future as uncertain.



22%

## GLOBAL WORKFORCE TRANSFORMATION

By 2030, 22% of global roles are projected to fundamentally change\*, creating 170 million new jobs **while displacing 92 million.**

39%

## CURRENT SKILLS TO BECOME OBSOLETE

Approximately 39% of today's essential work skills are projected to become obsolete by 2030\*.

# FORCE 1: OPPORTUNITIES TO FOCUS

For growth, institutions should focus on...

1

THE GLOBAL  
TALENT RACE

01

FUTURE-READY CURRICULUM:

- Revamp educational programs to foster adaptable skills, addressing the 67% of students concerned about an uncertain future in a shifting global workforce.

02

PROACTIVE SKILL EVOLUTION:

- Commit to ongoing skill development, recognising that 39% of current skills may be obsolete by 2030. Equip students with the ability to continuously learn and adapt.

03

ENHANCED EMPLOYABILITY  
FOCUS:

- Strengthen the integration between education and employment, ensuring graduates are well-prepared to excel in a dynamic and evolving global job market.





## FORCE 2: AI & THE REINVENTION OF LEARNING AND WORK

## FORCE 2: IMPLICATIONS FOR AUSTRALIA'S TERTIARY SECTOR

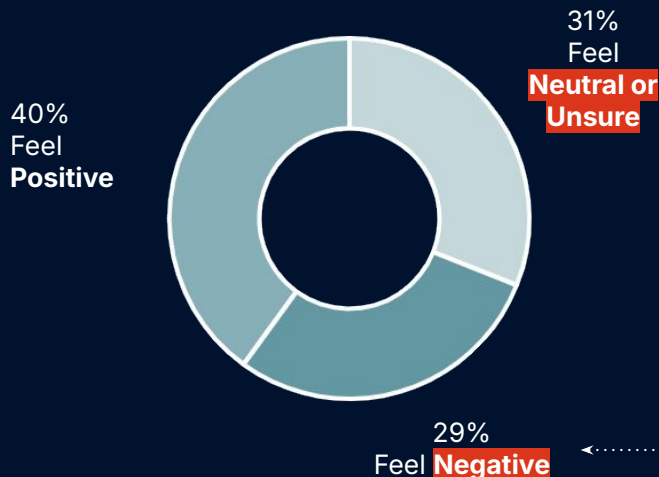
AI IS REDEFINING KNOWLEDGE, VALUE, AND EDUCATION, TRANSFORMING HOW SKILLS ARE ACQUIRED AND APPLIED GLOBALLY.



## FORCE 2: AI & THE REINVENTION OF LEARNING & WORK

While 40% of students view AI positively for their careers, 60% remain neutral or negative, underscoring uncertainty and the need for improved AI literacy.

STUDENT SENTIMENT ON AI'S CAREER IMPACT



60%

Current or future students feel either **neutral, unsure or negative** about AI's impact on their future career.

50%

Current or future students agree that AI is making them rethink the value of their education.

68%

Current or future students feel confident in their ability to use AI tools effectively.



# FORCE 2: OPPORTUNITIES TO FOCUS

For growth, institutions should focus on...

2

AI & THE  
REINVENTION  
OF LEARNING

01

BALANCED EDUCATIONAL  
MODELS:

- Blend traditional skills with digital competencies to prepare students for an AI-driven future.

02

CONTINUOUS PROFESSIONAL  
DEVELOPMENT:

- Provide educators with ongoing AI literacy training to effectively guide students.

03

ADAPTED ACADEMIC INTEGRITY  
FRAMEWORKS:

- Update integrity policies to address AI challenges, ensuring trust and standards are maintained.

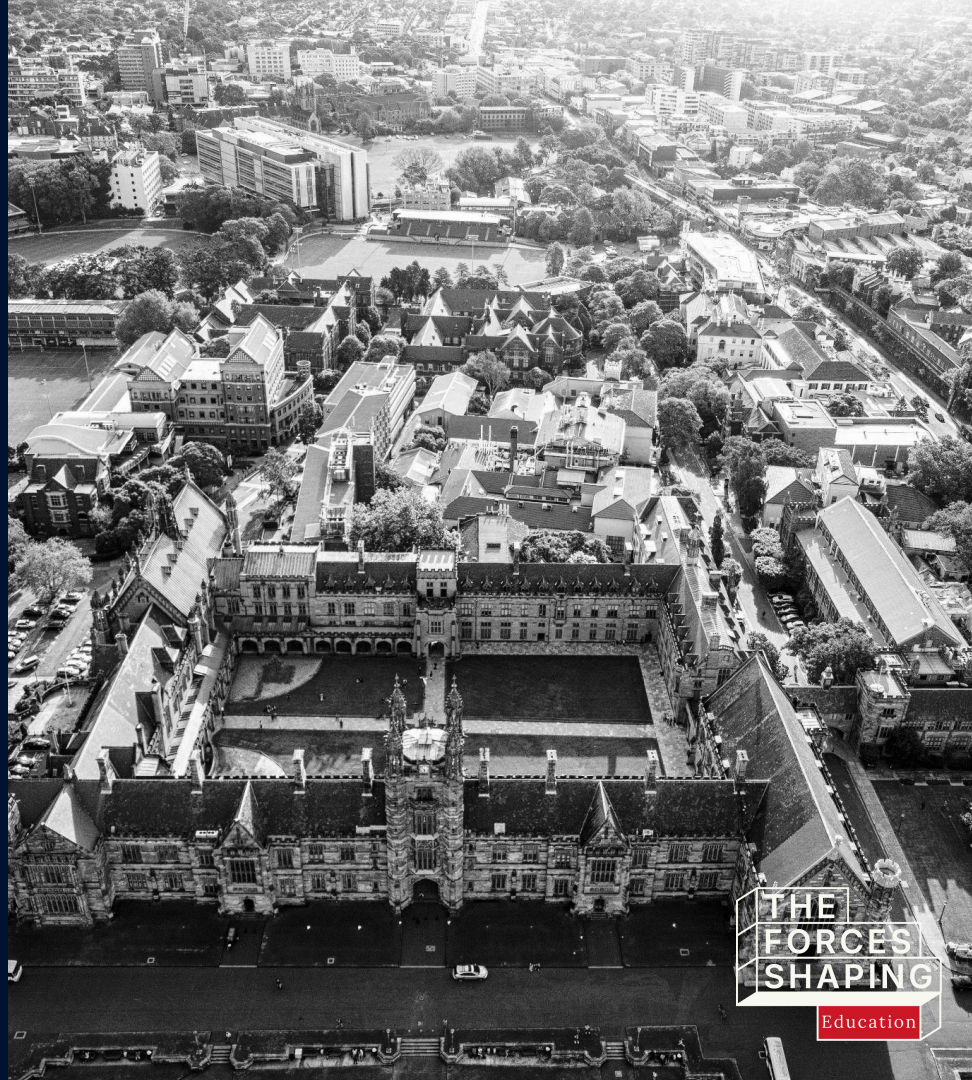


## FORCE 3: DOMESTIC PRESSURES THREATEN GLOBAL STANDING



## FORCE 3: IMPLICATIONS FOR THE TERTIARY EDUCATION SECTOR

CONCERNS OVER IMMIGRATION AND HOUSING HAVE  
PROMPTED THE AUSTRALIAN GOVERNMENT TO  
IMPLEMENT NEW REGULATIONS, CAUSING  
SHORT-TERM UNCERTAINTY BUT AIMING TO FOSTER  
LONG-TERM SUSTAINABILITY.





## FORCE 3: DOMESTIC PRESSURES THREATEN GLOBAL STANDING

Australia's standing as a top education destination is evolving due to domestic political issues, challenging the sector to reform while remaining competitive globally.

# \$50B

### EDUCATION IS AUSTRALIA'S 4TH LARGEST EXPORT

This vital \$50B p.a export is under threat. Maintaining this contribution requires strategic adaptation and reform to meet new regulatory priorities.

#### GOVERNMENT REFORMS: NEW CAPS TO MODERATE GROWTH IN IMMIGRATION

**295K** enrollments down from **570K+**

New international student commencements capped at 295k by 2026, down from uncapped peaks of 572k in 2024 across both university and VET institutions.

#### PLUS NEW LAYERS TO NAVIGATE...

Additional hurdles for institutions implemented, including **student accommodation support** and **increased Southeast Asia engagement**. Institutions meeting government priorities may receive additional places.

# FORCE 3: DOMESTIC PRESSURES THREATEN GLOBAL STANDING

Australia's appeal as a destination for international students is being challenged—especially by regional competitors.

## 1. CLEAR EVIDENCE OF DECLINE

In the latest global rankings, most of Australia's leading universities, including the University of Melbourne, the University of Sydney, ANU, and UNSW have seen their positions erode.<sup>1</sup> For instance, the University of Melbourne dropped from 12th to 19th in QS, while THE rankings show similar slippage across multiple institutions.<sup>2</sup>

## 2. REGIONAL COMPETITION IS INTENSIFYING

Two decades ago, Australia, the US, and the UK led the competition for top Southeast Asian students.

Today, regional institutions are closing the gap. The National University of Singapore now ranks 8th globally, the highest position of any Asian university, with NTU also climbing to the global top 20.<sup>3</sup>

## 3. RANKINGS MATTER FOR PERCEPTION

In many Asian markets, global rankings act as proxies for quality and career prospects. Even small shifts can sway student decisions. QS, one of the big three global ranking agencies specifically warns that restricting international student numbers may erode Australia's standing, and thus its attractiveness, as a global study destination.<sup>4</sup>

1. *Aussie unis slide in global rankings*, news.com.au, 9 October 2024. Retrieved from [news.com.au](https://www.news.com.au).

2. Cassidy, C. (2025, June 18). "Wake-up call" for Australian universities as 70% suffer a fall in latest global ranking. The Guardian. Retrieved 14/8/25, from Guardian Australia website.

3. National University of Singapore. (2024, June 5). NUS at world No. 8 and top in Asia in QS World University Rankings 2025. Retrieved 14/8/25, from News-NUS website.

4. QS ranks Aussie universities among world's best—but future in doubt. (2024, June 5). \*news.com.au\*. Retrieved 14/8/25, from news.com.au

# FORCE 3: OPPORTUNITIES TO FOCUS

For growth, institutions should focus on...

3

POLITICAL  
PRESSURES  
THREATEN  
GLOBAL  
STANDING

01

SAFEGUARDING ECONOMIC  
CONTRIBUTIONS:

- With \$50 billion at risk, tertiary institutions must adapt to policy changes to protect this vital economic contribution, ensuring continued funding for research, teaching, and infrastructure.

02

MAINTAINING GLOBAL  
COMPETITIVENESS:

- It is imperative to sustain and enhance Australia's standing as a global education destination. This requires strategic reforms and investments to attract international students and nurture global talent.

03

ENSURING WORLD-CLASS  
EDUCATION:

- By aligning with new regulations and fostering innovation, institutions can continue to provide world-class education for both international and domestic students, safeguarding the national interest and economy.





## FORCE 4: SHIFTING DOMESTIC DEMAND BEYOND THE DEGREE

# FORCE 4: SHIFTING DOMESTIC DEMAND BEYOND THE DEGREE

## Vocational Education's Rise

National VET Enrollments jumped 20% from 2019-'23, to 5.1m in 23 (10% from 22-23), compared to 1.6m students in universities\*.

Vocational education is seen as practical, secure, and career-focused.

Students prioritise job prospects (41%) and availability (36%), yet only 46% feel prepared by prior education.

## Lifelong Learning Imperative

Education is no longer front-loaded; lifelong, flexible learning is essential.

Employers are increasing upskilling budgets (85% increase by 2030).

Adult learners favour cost-effective, flexible, especially online, learning options.

## Pursuit Passion and Purpose

Personal growth (50%) and pursuing passions (46%) surpass financial motivations as primary motivation.

The pandemic's mixed impact: Negative among young leavers (49%), positive shift towards flexibility for adults (70%).

80% value authenticity and self-expression in education settings.

## FORCE 4: IMPLICATIONS FOR AUSTRALIA'S TERTIARY SECTOR

A NEW WAVE OF LEARNER EXPECTATIONS IS  
REDEFINING HIGHER EDUCATION'S ROLE, FOCUSING  
ON FLEXIBILITY AND PERSONAL GROWTH.

THIS BROADENING SET OF NEEDS CREATES  
OPPORTUNITIES (AND CHALLENGES) FOR VET  
INSTITUTIONS TO CAPITALISE.





# FORCE 4: OPPORTUNITIES TO FOCUS

For growth, institutions should focus on...

4

DOMESTIC  
DEMAND SHIFTS

01

POSITIONING VOCATIONAL AND  
LIFELONG LEARNING:

- Providers must establish vocational and lifelong learning as credible alternatives to traditional degrees, ensuring they meet evolving student needs.

02

MAINTAINING GLOBAL  
COMPETITIVENESS:

- Institutions need adaptable, flexible learning modes that accommodate diverse life stages, catering to both traditional and non-traditional students. This includes short learning modules, and microcredential opportunities.

03

ENSURING WORLD-CLASS  
EDUCATION:

- Educational offerings must align with student identity, passion, and purpose to enhance engagement and satisfaction, ensuring a world-class education that protects national interests and the economy.





## FORCE 5: AUSTRALIAN STUDENTS' ROI RECKONING

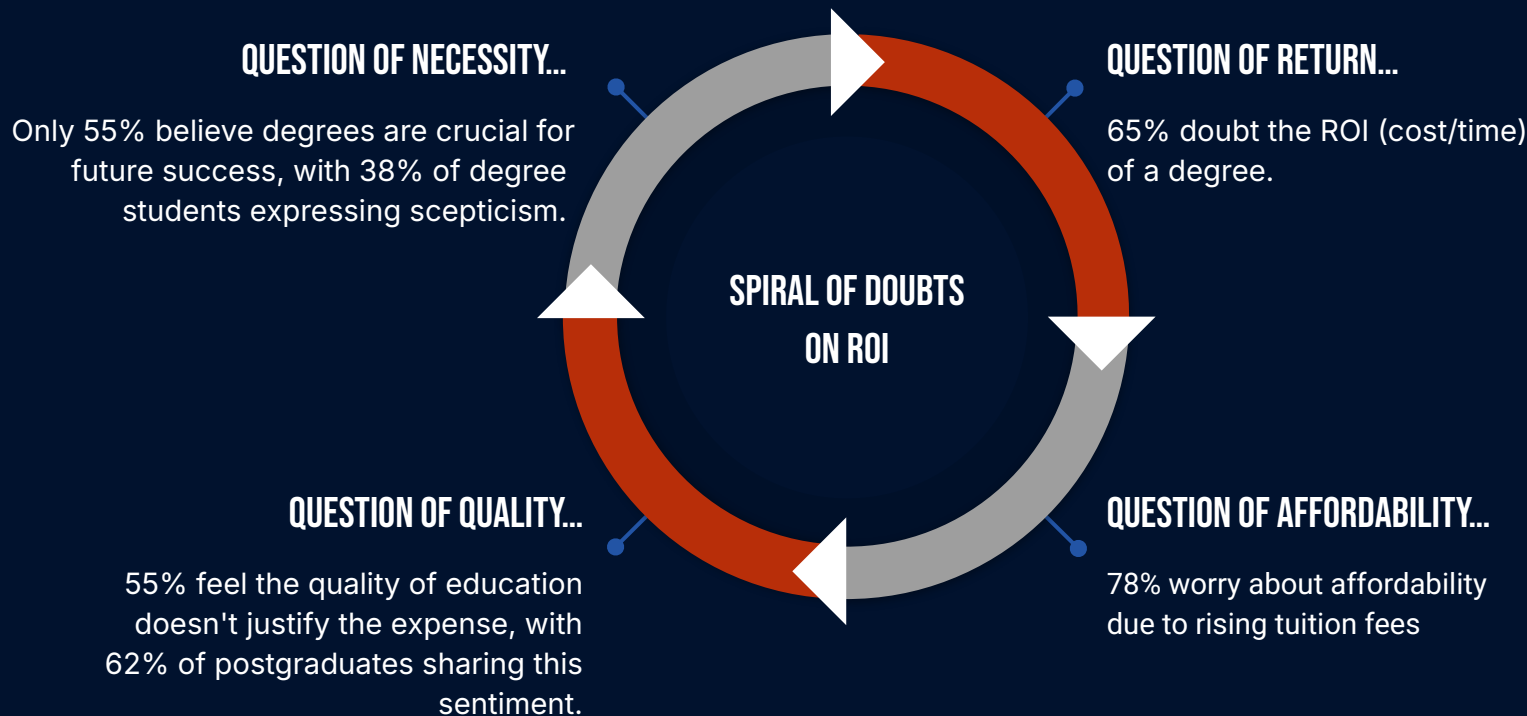
## FORCE 5: IMPLICATIONS FOR AUSTRALIA'S TERTIARY SECTOR

THE VALUE PROPOSITION OF HIGHER EDUCATION IS UNDER INTENSE SCRUTINY, WITH RISING COSTS AND FINANCIAL COMMITMENTS PROMPTING STUDENTS TO QUESTION THEIR RETURN ON INVESTMENT.



# FORCE 5: AUSTRALIAN STUDENTS' ROI RECKONING

Students increasingly doubt the return on investment of a degree.





# FORCE 5: OPPORTUNITIES TO FOCUS

For growth, institutions should focus on...

5

STUDENTS' ROI  
RECKONING

01

VALIDATING THE VALUE  
PROPOSITION:

- Higher education must clearly demonstrate its value, ensuring that benefits outweigh costs to sustain enrolments and funding.

02

DIVERSIFYING EDUCATIONAL  
OPTIONS:

- Providers should offer diverse pathways and enhance practical outcomes to meet evolving student expectations.

03

ENHANCING STUDENT SUPPORT:

- Institutions need to improve student support, career readiness programs, and transparent communication about ROI to reassure students and maintain Australia's global standing.



# THE CONNECTIVE TISSUE: HOW ARE THE EXTERNAL FORCES CONNECTED TO STUDENT NEEDS FOR A FUTURE-READY EDUCATION?

To successfully navigate a world of external pressures, institutions must prioritise a deep understanding of their students' needs and deliver an education that directly addresses their anxieties and ambitions.

We have identified **3 universal needs** across all student cohorts that institutions must deliver upon. In Act II you will learn how these show up depending on the pathway (university or VET) or life stage of the student (current, future or adult learners).



# ACT II

## STUDENT NEEDS & PRIORITIES

What matters most to students — and how it's shaping their choices

IN A RAPIDLY CHANGING HIGHER EDUCATION LANDSCAPE, **THREE UNIVERSAL NEEDS**  
**CONSISTENTLY SHAPE STUDENT DECISIONS AND EXPECTATIONS.**

01 CONFIDENCE FOR THE FUTURE

**STUDENTS ARE WEIGHING THE RISK  
VS REWARD OF FURTHER STUDY.**

They want assurance **their chosen path is the right one**, aligned with their goals, leading to real opportunities, meaningful outcomes, and lasting value.

02 COMFORT WITH AI IMPACTS

**AI IS RESHAPING WORK, LEARNING,  
AND SOCIETY – AND STUDENTS  
WANT GUIDANCE.**

They seek support to understand AI's role, navigate change, and build their comfort to thrive alongside it.

03 CONTENT THAT REASSURES

**UNCERTAINTY IS DRIVING DEMAND  
FOR BETTER, MORE RELEVANT  
COURSE CONTENT.**

Students expect engaging, trustworthy, and practical content that helps them succeed in a fast-changing sector.



WHILE THESE NEEDS ARE UNIVERSAL, THE WAY **THEY SHOW UP FOR UNIVERSITY AND**  
**VOCATIONAL STUDENTS** COULDN'T BE MORE DISTINCT.

01

CONFIDENCE FOR THE FUTURE

02

COMFORT WITH AI IMPACTS

03

CONTENT THAT REASSURES

## UNIVERSITY

*Defining mindset: Driven & Agile*

- Digitally agile, seeking growth, purpose, and long-term opportunity.
- View further study as a way to explore passions, build knowledge, and unlock career options.
- Attracted to breadth, recognition, and access to expert networks.
- Question whether degrees will meet their needs in a future shaped by AI, shifting skills, and social change.

## VOCATIONAL

*Defining mindset: Grounded & Goal-oriented*

- Driven by practical outcomes and job-readiness.
- Motivated by greater career options, with pathways that match their interests and learning style.
- Value low cost, flexible delivery, and hands-on training.
- Feel under-recognised and more vulnerable in an AI-disrupted world.

WITHIN EACH PATHWAY, **STUDENT NEEDS ARE FURTHER SHAPED BY WHERE THEY ARE IN LIFE** — FROM CURRENT STUDENTS TO SCHOOL LEAVERS TO ADULT LEARNERS.

UNIVERSAL  
NEEDS

01

CONFIDENCE FOR THE FUTURE

02

COMFORT WITH AI IMPACTS

03

CONTENT THE REASSURES

PATHWAY

UNIVERSITY

VOCATIONAL

LIFESTAGE

CURRENT STUDENTS

In the thick of study — juggling  
assessments, sector change,  
and future ROI.

Entered with optimism but now  
feel rising costs, digital  
disruption, and high  
expectations.

SCHOOL LEAVERS

Enthusiastic but anxious, facing  
big life decisions.

Want assurance their choice will  
deliver beyond graduation into  
career success.

ADULT LEARNERS

Balancing ambition, logistics,  
and self-doubt.

Need accessible, flexible study  
that respects their complex lives.



**REVEALING SEVEN DISTINCT PURPOSE COHORTS:**  
**DIFFERENT GOALS. DIFFERENT JOURNEYS. DIFFERENT NEEDS.**

UNIVERSAL  
NEEDS

01

CONFIDENCE FOR THE FUTURE

02

COMFORT WITH AI IMPACTS

03

CONTENT THAT REASSURES

PATHWAY

UNIVERSITY

VOCATIONAL

LIFESTAGE

CURRENT STUDENTS

*Ambitious but under pressure, seeking reassurance their choice is still relevant. Want confidence it will deliver value in a fast-changing world.*

CURRENT STUDENTS

*Career-driven but cautious, feeling uncertain about the future they're entering.*

SCHOOL LEAVERS

*Curious and connected, seeking a balance between freedom, identity, and security.*

SCHOOL LEAVERS

*Facing rising costs and disruption, want practical skills and pathways to stability.*

ADULT LEARNER UG

*Practical and purposeful, want formal recognition of skills that fits their life.*

ADULT LEARNER PG

*Focused but stretched, need advanced study to deliver real, tangible value.*

ADULT LEARNERS

*Independent but hesitant, weighing whether study is worth the investment as AI reshapes work.*



## UNIVERSITY PATHWAY STUDENTS

Digitally agile and purpose-driven, seeking broad knowledge, recognition, and long-term opportunities, yet questioning degrees' future relevance in an AI-shaped world.



# UNIVERSITY PATHWAY STUDENTS

62%

agree that getting a university or college degree is **critical to future life and career success**

67%

say **things are changing so fast**, my future feels uncertain and overwhelming

A photograph of three young women sitting outdoors on a paved surface, engaged in conversation. The woman on the left has curly hair and is wearing a white t-shirt. The woman in the middle has her hair in a bun and is wearing a light blue t-shirt. The woman on the right has long blonde hair and is wearing a green t-shirt, gesturing with her hands as she speaks. The background is filled with green foliage. A dark blue semi-transparent banner is overlaid across the middle of the image, containing white text.

## UNIVERSITY: CURRENT STUDENTS

Ambitious but under pressure, seeking reassurance their choice is still relevant. Want confidence it will deliver value in a fast-changing world.



# UNIVERSITY: CURRENT STUDENTS

## THEIR NEEDS...

**Current university students are under pressure:** progressing through study while expectations keep shifting.

They are capable and digitally confident, yet increasingly concerned about AI's impact on their learning experience and future job prospects.

They need **ongoing reassurance** and visible support that their chosen path remains relevant and valuable.

## UNIVERSAL NEEDS

### CONFIDENCE IN EDUCATION IS HIGH

72%

agree they're getting the education needed to succeed in future careers (ix111).

### COMFORT WITH AI IS HIGH

67%

are confident using AI tools (ix129), yet only one-third (ix92) feel positive about AI's impact on their future.

### CONTENT THAT PREPARES

45%

On average, 45% want more focus from media and government on preparing students for future jobs.

# UNIVERSITY: CURRENT STUDENTS

For growth in this climate, focus on...

01

**For Universities:**  
Reassure & Relevance

- Keep students confident in the value of their degree by connecting study content to evolving job markets, AI integration, and future career security.

02

**For Business:**  
Partner for Readiness

- Collaborate with universities to embed industry projects, mentorship, and internships that give students first-hand experience and in-demand skills.

03

**For Media:**  
Champion Student Futures

- Highlight success stories, skills trends, and future employment pathways to build confidence in the worth of higher education.



A photograph of four young women sitting outdoors on a wooden bench. They are all looking at a laptop screen that is resting on the lap of the woman in the center. The woman on the far left is wearing a brown t-shirt and has dark hair. The woman next to her is wearing a black t-shirt and has dark hair. The woman in the center is wearing a striped off-the-shoulder top and has long brown hair. The woman on the far right is wearing a white tank top and has long brown hair. They are all smiling and appear to be engaged in a conversation. The background shows some greenery and a building.

## UNIVERSITY: SCHOOL LEAVERS

Curious and connected, seeking a balance between freedom, identity, and security.

# UNIVERSITY: SCHOOL LEAVERS

## THEIR NEEDS...

**School leavers are excited but uncertain** as they navigate their next steps in a fast-changing world.

Digitally native and increasingly independent, they're highly aware of AI's disruption to their life and career prospects.

While cost matters, their bigger focus is on **how education fits their lifestyle today** and prepares them for a secure, successful future.

## UNIVERSAL NEEDS

### CONFIDENCE IN EDUCATION IS HIGH

72%

agree they're getting the education needed to succeed in future careers (ix111).

### COMFORT WITH AI IS MODERATE

69%

are confident using AI tools (ix129), but only 29% (ix81) feel positive about AI's impact on their future.

### CONTENT THAT PREPARES

38%

38% (ix82) want more media focus on student preparedness, and 50% (ix93) say this should be a government priority.



# UNIVERSITY: SCHOOL LEAVERS

For growth in this climate, focus on...

01

**For Universities:**  
Guide with Purpose

- Help school leavers navigate choices by linking degrees to passions, lifestyle fit, and secure future careers.

02

**For Business:**  
Engage Early Talent

- Offer clear employment pathways, work experience, and sponsorships that make education more tangible and aspirational.

03

**For Media:**  
Make Options Visible

- Showcase the diversity of university courses, student experiences, and graduate outcomes to inspire informed decision-making.



A photograph of four adults (three men and one woman) sitting around a table in a modern office or meeting room. They are looking at a laptop screen. The man on the left is wearing glasses and a dark shirt. The woman next to him is wearing a black top. The man next to her is wearing glasses and a blue jacket over a grey shirt. The woman on the far right is wearing an orange top and glasses. The background shows large windows with a view of greenery.

## UNIVERSITY: ADULT LEARNERS

### Undergraduates:

Practical and purposeful, want formal recognition of skills that fits their life.

### Postgraduates:

Focused but stretched, need advanced study to deliver real, tangible value.

# UNIVERSITY: ADULT LEARNERS (UNDERGRADUATE & POSTGRADUATE)

## THEIR NEEDS...

**Adult learners are motivated to grow, formalise skills, and prepare for a changing future, driving renewed interest in degrees, micro-credentials, and targeted upskilling.**

They are digitally confident and clear in their direction, but want study to **fit realistically** around career ambition, personal commitments, and the demands of work, family, and finances.

## UNIVERSAL NEEDS

### CONFIDENCE IN EDUCATION IS HIGH

**71%**

agree their education will help them succeed in future careers (ix110).

### COMFORT WITH AI IS MODERATE-HIGH

**52%**

are confident using AI tools (ix129), and half of these (ix134) feel positive about AI's impact on their future.

### PREPARED TO PAY

**30%**

**3 in 10 see clear value in paying for quality education content in news media (ix171).** Around half believe media and government should focus more on student preparedness for the future.



# UNIVERSITY: ADULT LEARNERS (UNDERGRADUATE & POSTGRADUATE)

For growth in this climate, focus on...

01

**For Universities:**  
Flexibility That Delivers

- Provide modular, stackable qualifications and tailored support that fit around work, family, and financial realities.

02

**For Business:**  
Co-Design Upskilling

- Work with universities to deliver targeted programs addressing industry skill gaps while accommodating employee schedules.

03

**For Media:**  
Promote Career Pathways

- Tell compelling stories of adult learners achieving advancement through higher education, boosting perceived ROI.

A photograph of a workshop scene. In the foreground, a man with grey hair and a beard is focused on working with a tool on a wooden object. He is wearing a brown jacket. In the background, a woman with long dark hair, wearing a white shirt and blue denim overalls, stands with her arms crossed, observing the work. The workshop is filled with various tools, workbenches, and equipment. The image has a warm, reddish-orange tint.

## VOCATIONAL PATHWAY STUDENTS

Grounded in practical outcomes and job-readiness, valuing affordability, flexibility, and hands-on training, but feeling under-recognised in an AI-disrupted world.



# VOCATIONAL PATHWAY STUDENTS

ONLY  
Y **46%**

agree their own education prepared them well for the realities of life (vs 66% of University students).

**80%**

Admit that the rising costs of education make me worried about affording it.





## VOCATIONAL: CURRENT STUDENTS

Career-driven but cautious, feeling uncertain about the future they're entering.

# VOCATIONAL: CURRENT STUDENTS

## THEIR NEEDS..

**Grounded and financially cautious,** vocational students seek education with immediate relevance and real-world outcomes.

They often feel **overlooked in future-focused conversations,** especially as AI introduces uncertainty.

To stay engaged and confident, they need **recognition of vocational pathways** and stronger alignment between learning and the workforce they're entering.

## UNIVERSAL NEEDS

### CONFIDENCE IN EDUCATION IS MODERATE

57%

agree their education will prepare them for future careers (ix88).

### COMFORT WITH AI IS MODERATE

HALF

feel confident using AI tools (ix99), but only 21% (ix59) feel positive about AI's impact. Just 1 in 3 are comfortable using AI in learning.

### CONTENT THAT PREPARES

50%

Around half believe student preparedness for jobs needs more attention from both media (46%/ix98) and government (55%/ix102).



# VOCATIONAL: CURRENT STUDENTS

For growth in this climate, focus on...

01

For VETs:  
Recognise Real Skills

- Elevate the status of vocational training by showcasing its direct link to employability, industry demand, and rapid career entry.

02

For Business:  
Strengthen Industry Links

- Expand partnerships with VET providers to ensure curriculum reflects real-world tools, technology, and practices.

03

For Media:  
Shift the Perception

- Challenge outdated views by highlighting vocational success stories and its critical role in a future-ready workforce.



## VOCATIONAL: SCHOOL LEAVERS

Facing rising costs and disruption, want practical skills and pathways to stability.



# VOCATIONAL: SCHOOL LEAVERS

## THEIR NEEDS..

**Pragmatic and job-focused,** vocational school leavers carry a sense of pressure and uncertainty about their path.

They're motivated by **low-barrier pathways** aligned to their interests, but feel under-recognised in a world they believe still favours traditional degrees.

They need clear signals that vocational study is **valued, future-ready, and responsive** to the changing world of work.

## UNIVERSAL NEEDS

### CONFIDENCE IN EDUCATION IS LOW

42%

agree their education will prepare them for future careers (ix65), while 86% say their future feels uncertain.

### COMFORT WITH AI IS MODERATE

69%

are confident using AI tools (ix129), but only 29% (ix81) feel positive about AI's impact on their future.

### CONTENT THAT PREPARES

47%

47% (ix86) want more attention from government, and 41% (ix88) from media, on preparing students for future jobs and industries.



# VOCATIONAL: SCHOOL LEAVERS

For growth in this climate, focus on...

01

For VETs:  
Value Vocational Choice

- Position vocational education as a respected, high-return alternative with clear entry points to growth industries.

02

For Business:  
Offer Early Entry Routes

- Provide school leavers with apprenticeships, traineeships, and pathways that accelerate entry into stable, well-paid careers.

03

For Media:  
Normalise Non-Degree  
Success

- Profile young vocational achievers to show the prestige and security of skilled trades and technical careers.



## VOCATIONAL: ADULT LEARNERS

Independent but hesitant, weighing whether study is worth the investment as AI reshapes work.



# VOCATIONAL: ADULT LEARNERS

## THEIR NEEDS..

**Self-directed but cautious,** vocational adult learners carefully weigh cost, effort, and long-term value before committing.

They feel **less confident navigating AI** and more uncertain about the impact of digital disruption, so they're focused on staying competitive.

To move forward, they need **clearer value signals** and stronger reassurance that pathways are recognised, supported, and aligned with real-world demands.

## UNIVERSAL NEEDS

### CONFIDENCE IN EDUCATION IS MODERATE

60%

agree their education will prepare them for future careers (ix93).

### COMFORT WITH AI IS LOW

45%

Only 45% feel confident using AI tools (ix85), and just 31% (ix87) feel positive about AI's impact on their future.

### CONTENT THAT PREPARES

41%

41% (ix88) want more media focus, and 56% (ix103) believe government should prioritise student preparedness.

# VOCATIONAL: ADULT LEARNERS

For growth in this climate, focus on...

01

For VETs:  
Clear Value, Strong Support

- Offer transparent ROI, recognition of prior learning, and flexible delivery formats to meet adult learners' needs.

02

For Business:  
Targeted Workforce Upskilling

- Partner with VET providers to offer bite-sized, work-relevant courses that maintain workforce competitiveness.

03

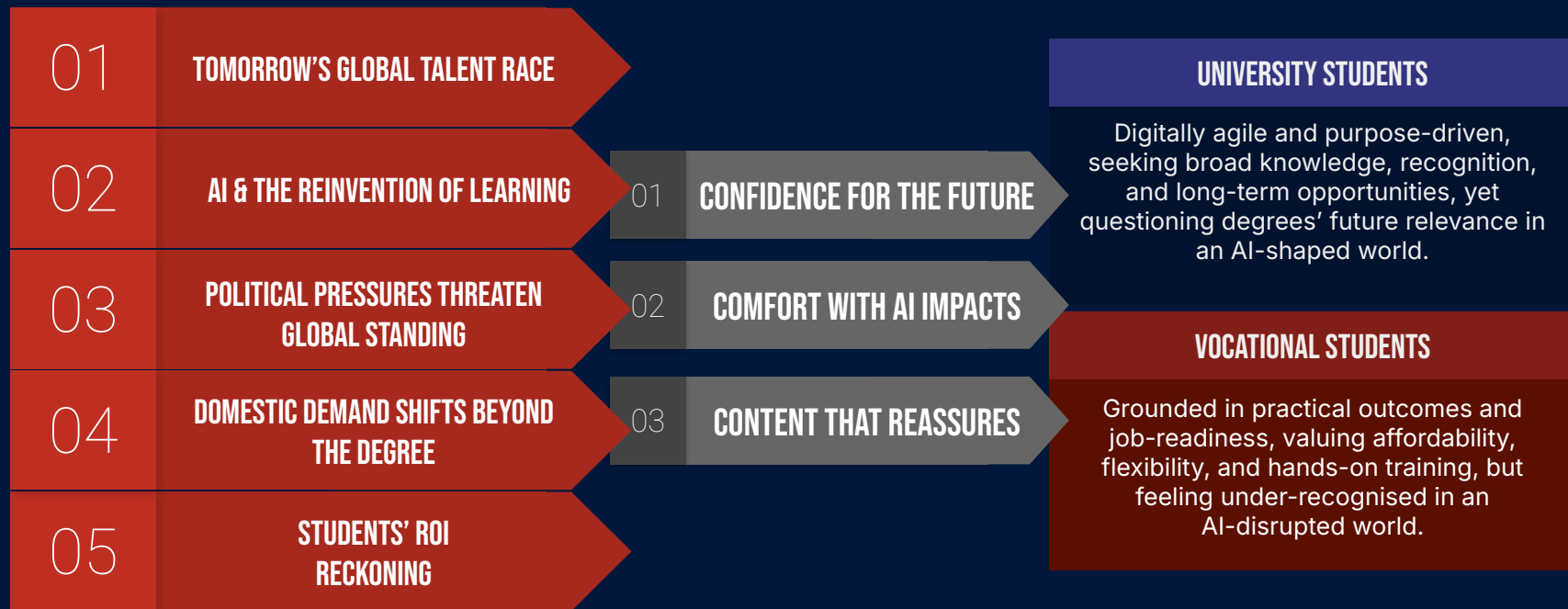
For Media:  
Demystify Pathways

- Publish accessible guides and case studies showing how vocational qualifications open doors at any career stage.



**SO WRAPPING THIS ALL UP**

# CONNECTING THE DOTS: FORCES DRIVING STUDENT CHOICES



# THE FINAL SUMMARY - HOW CAN YOU SUPPORT TOMORROW'S STUDENTS?

UNIVERSAL NEEDS		UNIVERSITIES	VETS	BUSINESS	MEDIA
01	CONFIDENCE FOR THE FUTURE	Align courses with evolving job markets, ensuring graduates feel equipped for a shifting global economy.	Promote vocational pathways as respected, future-proof options that lead to in-demand roles.	Partner with education providers to shape industry-aligned skills pipelines.	Spotlight career trends and future job opportunities to guide student decision-making.
02	COMFORT WITH AI IMPACTS	Integrate AI literacy into all disciplines, blending technical skills with ethical and practical guidance.	Build AI readiness into practical training so graduates can adapt to tech-driven workplaces.	Provide workplace-based AI training that complements formal study.	Create accessible content that demystifies AI's role in work and education.
03	CONTENT THAT REASSURES	Communicate clearly how degrees deliver tangible career outcomes and long-term value.	Showcase success stories and wage outcomes to reinforce the value of vocational qualifications.	Share clear talent pathways and job prospects to attract and retain emerging talent.	Publish credible, relatable stories showing how education leads to real success.



# THE FORCES SHAPING

Education

**Australia's Tertiary  
System & Students**