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Non School Leavers: The Future of Higher Education?

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Abstract

Higher Education in Australia is facing a number of challenges as it enters the 21st century. Changes to federal legislation, employment issues and population shifts are all contributing to what has become a very public debate on the role of universities in contemporary society. While the ultimate resolution of this situation is likely to remain elusive for some time, its effects on the higher education market are arguably already becoming apparent, and raise significant issues about recruitment that universities may need to be addressing now if they are to successfully adapt.

One such issue involves developing a clear understanding of the higher education market – who comes to university, why do they come and what do they want from the experience? While these questions are important ones for any future market, they are particularly pertinent for the segment referred to as non school leavers; an umbrella term covering a very diverse group of people with potentially broad needs, who may nevertheless become increasingly important to the domestic market in a country with a significantly ageing population. This paper explores the significance of non school leavers to the future of universities and the process of creating a profile that will successfully describe this diverse market segment.

Introduction

Higher education in Australia is facing a number of challenges as it enters the 21st century. Changes to federal government legislation, both enacted and pending, are moving universities towards a user pays approach, while many argue that measures such as voluntary student unionism (VSU) will change the nature of the university experience. At the same time, demographic trends are reducing the numbers of future school leavers, the formerly dominant source of tertiary students, and these trends will intensify. Therefore higher education institutions need to consider what changes to their present recruitment strategies may become necessary. This paper puts forward the proposal that tertiary providers may find it useful to investigate the potential higher education needs of non school leavers.

Literature Review

A strong federal focus in recent years has seen the introduction of reforms aimed at shifting traditional methods of operation to more business orientated models. The impact of legislation such as *Backing Australia's Future* and other planned reforms that will allow the importation of international institutions such as Carnegie Mellon, which will commence offering American degrees onshore in Adelaide in 2006 (Rann, 2005:31; Wiese Bockmann, 2005:6), has encouraged an unprecedented level of competition. Full fee places and increased student fee contributions have propelled the sector towards a user pays system, as has the proposed voluntary student unionism legislation. The full impact of this transformation of students into paying customers has yet to be determined, though it seems reasonable to predict that it will affect expectations and perceptions of the university experience. It is only to be expected that students will become more aware of their buying power as consumers and the criteria upon which they base their choice of institution, or indeed their decision to pursue tertiary study at all, could undergo substantial changes.

At the same time it is predicted that a move to VSU could change the very nature of the university experience altogether; certainly this is currently being argued in many public forums (Trenwith, 2005; Seares et al 2005; Healy, 2005; Barnett and Pash, 2005, *Student Life Under Threat*, 2005). Some of the claims that are being made are quite extreme – such as that VSU may contribute to both the national obesity problem, due to a predicted replacement of union refectories with fast food outlets, and the declining youth population, since 'countless families owe their existence to encounters at university social events and taverns' (Shilkin,

2005:34). Yet it does seem likely that many extra-academic options currently available to students will no longer be viable on a user pays basis. Increased competition has also led to an emphasis on alternatives to university studies, particularly for school leavers, with the prime minister himself on record as encouraging students to consider leaving school at year 10 level to pursue a career in trades (Colman and Yaman, 2005:1). However the effect of such publicity may have extended beyond just school students. A report commissioned by the National Centre for Vocational Education Research (NCVER) and released earlier this year suggests that students already enrolled at university may increasingly be leaving to undertake Technical and Further Education (TAFE) or other vocational education and training (VET) options, with flow from universities to the VET sector being three times that of the reverse (Harris et al, 2005:5).

Not all of the challenges facing the sector are political in nature, however. As mentioned above, Australia, like much of the western world, is facing the prospect of an aging population. This will inevitably translate into a shrinking pool of one of the sector's traditional sources of students – school leavers. This problem is particularly pronounced in South Australia, where it is estimated that the proportion of the population aged 65 years or more will increase from its 2004 figure of 15% to 31% in 2051, compared to national figures of 12.9% and 27.1% respectively (VivaSA, 2005:21).

Any of these factors alone could potentially have a significant impact on the higher education market. However the concurrent incidence of all of them together makes it almost inevitable that the context of the sector will change substantially and permanently. Tertiary providers will therefore have to evolve to meet and overcome these challenges and their broader implications or face extinction. An essential step in this process will be to gain an understanding of their impact in the market place and how they are likely to affect the future customers of tertiary institutions. Answers to questions such as who is our audience, what do they want and how they (and their future employers) are to be kept satisfied will arguably take on even more than their current significance if students are to be attracted to tertiary study and then retained through to graduation.

Anecdotal evidence and personal experience have emphasised that the focus of much of the current practice in tertiary recruitment and marketing tends towards the school leaver segment of the market. Certainly the majority of queries received by the author in her role as a Business Analyst in Market Research revolve around school leavers, and university open days in many institutions are planned around school holidays and year 12 schedules. But does this accurately reflect the actual interest in tertiary education in the community? This study was conducted with the aim of investigating non school leaver applicants to South Australian universities, to identify any grouping characteristics that might assist university employees to better understand this diverse group of people, and lead to preliminary suggestions for constructing meaningful segmentation or profiles of non school leaver applicants.

Methodology

This study was conducted using data obtained from the South Australian Tertiary Admissions Centre (SATAC). This data contained information on applicants to all three South Australian universities over the last three years, namely The University of South Australia (UniSA), The Flinders University of South Australia (Flinders) and The University of Adelaide (Adelaide). Databases prior to 2003 also contained information on applicants to selected TAFE courses in South Australia. The data included information on variables such as age, gender, course preferences and level of program, but did not cover any details specific to the course, such as intended load or mode of study. Information on location of home address was unreliable and therefore not included in this analysis. Analysis was conducted using the statistical software package SPSS, and was limited to local, domestic applicants over the last five years. Consequently, the following paper refers only to applicants from South Australia or the Northern Territory, and excludes both interstate and local international applicants (full fee paying international secondary school students).[1]

Study Findings

A preliminary examination of applicants since 2003 revealed that non school leavers have consistently represented the largest proportion of applicants to South Australian universities at an average rate of 55%,

as well as the largest proportion of applicants to receive offers at an average rate of 57%.[2] While changes in the method of data collection used by SATAC in 2003 mean that it is not possible to isolate university applicants from TAFE applicants prior to this date, an examination of SATAC applicant data back to 1999 shows non school leavers still representing the majority of applicants to both types of institution (at an average rate of 54%).[3]

These figures suggest that, in South Australia at least, non school leavers already make up an important proportion of the current tertiary education market. However predicted future age profiles, both locally in South Australia and nationally (VivaSA, 2005:21), combined with predicted downturns in international student numbers (Maiden, 2005:3; Maslen, 2005:1; Illing, 2005:35) suggest that this market can only increase in importance. Consequently, a solid understanding of non school leavers – who they are and what they are hoping to achieve from their tertiary experience – is likely to become an essential part of securing a future market. While this paper does not pretend to provide definitive answers to these questions in any way, it is intended to start this process of increasing understanding by examining applicant data to identify common characteristics, as well as suggesting future areas of exploration.

The prospect of trying to achieve a non school leaver profile, or a description of what a typical non school leaver might look like, is clearly more challenging than it would be for school leavers. By definition the latter are seeking to enter university immediately after ceasing their secondary studies and thus tend to fit within a relatively narrow range of characteristics, such as age or basis of admission. In contrast, the term *non* school leaver incorporates by definition anyone who is *not* a school leaver, creating a potentially wide spread of characteristics, motivations and other factors. Anecdotal evidence suggests that while many tertiary sector employees have a fairly consistent image of school leavers, notions of non school leavers are vague. A combination of professional experience and discussion with other colleagues has suggested that those who do venture an opinion tend towards someone who is relatively mature, of either gender and motivated to return to study for reasons of career advancement or personal development. However the question remains as to how accurate this image might be, or on what it might be based.

One characteristic of applicants that can be examined relatively easily is gender. The anecdotal evidence mentioned above suggests that many people expect the gender of non school leaver applicants to be relatively balanced. However SATAC applicant data for the last five years shows a clear weighting towards female applicants, at an average rate of about 60% (Table 1).[4] This gender bias is quite consistent, appearing across all age divisions, with the percentage of female applicants even tending to increase slightly in the older age bands, with the exception of the oldest age range of 61 years and over.

Table 1: Percentage of Female Non School Leaver Applicants to Tertiary Education in South Australia by Age Group
(n = 11 686; 12 538; 12 670; 13 389 and 12 514 for 2001-2005 respectively)

Age Group	Year				
	2001	**2002**	**2003**	**2004**	**2005**
20 yrs or less	60%	61%	60%	60%	61%
21-30 yrs	58%	58%	60%	61%	59%
21-25 yrs	-58%	-58%	-59%	-61%	-60%
26-30 yrs	-58%	-60%	-61%	-61%	-58%
31-40 yrs	62%	64%	66%	66%	63%
41-50 yrs	65%	67%	67%	70%	69%
51-60 yrs	64%	66%	65%	70%	63%
61+ years	48%	55%	61%	76%	50%
Total	*60%*	*61%*	*61%*	*63%*	*61%*

Source: Compiled using SATAC applicant data for the years 2001-2005. Years 2003-2005 incorporate university applicants only; years 2001-2002 incorporate applicants to both university and TAFE.

The consistency of this gender ratio across all years and age divisions is quite striking. It is interesting to note that a similar weighting is also apparent in school leaver applicants, suggesting that females are

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generally more likely to seek tertiary admission than males, irrespective of age or extent of post-school experiences.[5] Consequently, gender can not really be highlighted as a defining characteristic of a non school leaver cohort.

A second characteristic that can be readily examined is age. In the anecdotal evidence mentioned above non school leavers were perceived most likely to be of an older age range, perhaps 30 years or more. Again, however, an analysis of SATAC applicant data reveals that for South Australian non school leaver university applicants this does not appear to be the case. Figure 1 shows a breakdown of these applicants by age over the last five years (2001-2002 applicants are for university or TAFE; 2003 onwards are for university only). It shows a clear skew towards the younger end of the scale, with a consistent median age of around 23 years across the five year period.[6] A breakdown of applicants by age group, such as is shown in Figure 2, suggests that interest in tertiary studies peaks in the twenties, and then decreases with increasing age, and that the majority of non school leaver applicants in this 21-30 year age band are actually aged 25 years or less. Indeed, on average almost half (45%) of all non school leaver applicants to South Australian tertiary institutions over the last five years have been aged 22 years or less, and one third (31%) have been aged 20 years or less.[7]

Figure 1: South Australian Non School Leaver Tertiary Applicants by Age
(Compiled from data obtained from SATAC, 2001-2005)

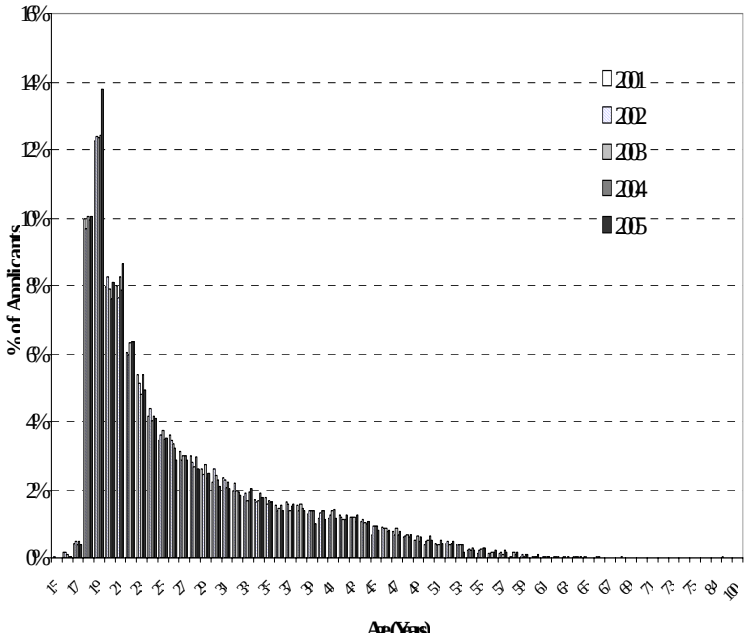
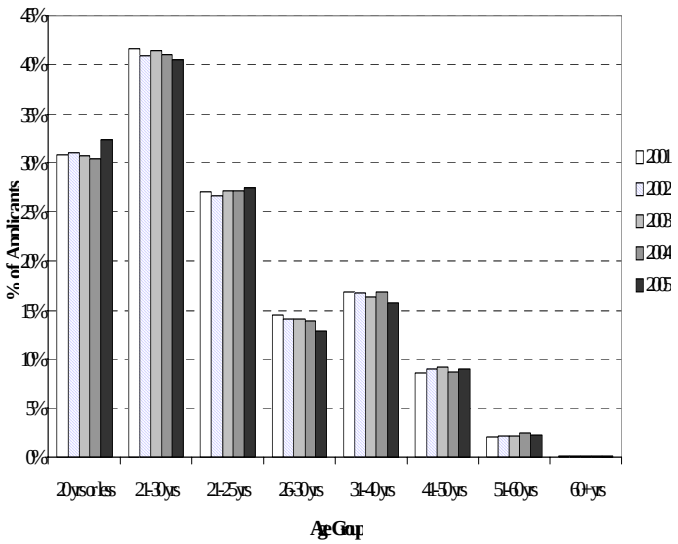


Figure 2: South Australian Non School Leaver Tertiary Applicants by Age Group
(Compiled from data obtained from SATAC, 2001-2005)



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Not only does this analysis suggest a much younger cohort of students than is commonly perceived, but it shows that many non school leavers are opting to undertake university studies at a relatively early stage of their post-secondary school lives. Indeed, given that the majority of students finish their secondary school studies at the age of 17 years in South Australia,[8] this suggests that many are choosing to return to study within only 3-5 years of completing their schooling.[9] This raises interesting questions about why they might be turning to study. Certainly it seems unlikely that people who are at the beginning of their working lives would be doing so for reasons of pure interest. While determining a motivation for study is outside the scope of this paper, an examination of preferences and preference behaviour can point towards some interesting possibilities.

Table 2 shows a breakdown of non school leaver applicants by basis of application. In South Australia there are several different methods via which access to tertiary studies can be gained, which can be summarized into five broad categories: completed secondary education (Y12); prior TAFE studies (TAFE); prior university studies (Higher Ed); special entry schemes (Special Entry) and successful completion of an approved bridging course (Bridging). Analysis is complicated by the fact that applicants can register more than one basis of application (BOA) and each will be used by SATAC in determining eligibility for study. However analysis of applicants by basis of application can give some interesting hints that may assist in the process of profiling. For example, Table 2 shows that a relatively large proportion of applicants aged 20 years or less apply solely on the basis of year 12 results (Y12 only), a figure that drops to one third of applicants on average for those aged 22 years or less. The absence of any evidence of study in these applicants suggests that a significant proportion may leave school with the intention of entering the workforce directly, but either find this difficult or are not satisfied with the level or choice of employment available to them. Either way, it suggests that gaining entry to the workforce, or assisting a career change or promotion, might be a strong motivating factor for this cohort.

Table 2: Non School Leaver Applicants to University in South Australia by Basis of Application
(n = 12 670; 13 389 and 12 514 for 2003-2005 respectively)

Basis of Application	Year 2003		2004		2005		Average	
	20 yrs	22 yrs	20 yrs	22 yrs	20 yrs	22 yrs	20 yrs	22 yrs
Y12	87%	78%	79%	65%	80%	65%	82%	69%
Y12 Only	40%	30%	39%	28%	40%	29%	40%	29%
TAFE	7%	9%	8%	10%	8%	10%	7%	9%
Special Entry	2%	11%	3%	13%	3%	12%	3%	12%
Bridging	0%	0%	1%	1%	1%	1%	1%	1%
Higher Ed								
- Total	51%	52%	44%	45%	43%	46%	46%	48%
- Incomplete	-43%	-39%	-40%	-36%	-40%	-36%	-41%	-37%
- Complete	-2%	-8%	-3%	-9%	-2%	-9%	-2%	-9%
- Unknown	-6%	-5%	-1%	-1%	-1%	-1%	-2%	-2%

Source: Compiled using SATAC applicant data for the years 2003-2005. Note that columns will not add up to 100% as applicants are permitted to apply using multiple bases of admission.

Secondly, Table 2 also shows that almost half of these younger applicants (on average) have engaged in some kind of previous higher education studies, mainly incomplete studies. Although it is not possible to tell from the applicant data alone, it is likely given the age profile that many of these applicants may already be enrolled in a higher education institution at the time of application. This raises two interesting possibilities. Firstly, that currently enrolled students may actually represent an important source of future applicants for tertiary institutions. Secondly, if we assume given the age profile that many of these *tertiary transfer* applicants were school leavers at the time of their initial entrance to university, it suggests that the primary focus of many such applicants may simply be to gain admission to tertiary studies, rather than on the particular program or field of study itself. An examination of preference behaviour of non school leaver applicants versus school leaver applicants provides some evidence that this might in fact be the case.

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Figure 3 shows the percentage of preferences lodged at each preference level by cohort, averaged across the three years of university level data only. Each applicant is permitted to lodge up to six preferences per year in decreasing order of desirability. It clearly shows that non school leaver (NSL) applicants as a group are far less likely to lodge lower order preferences than are school leavers (SL). Furthermore, when non school leavers *do* lodge lower order preferences they appear more likely than school leavers to continue to nominate programs that are classified within the same field of education (FOE – see Figure 4). Together this suggests that non school leavers are more directed in their study choices than school leavers, implying that their goal is to gain entry to a specific program or field of study. In contrast, school leavers may be focused on simply gaining entry to university, knowing that they can change their actual program of study at a later date.

Figure 3: Average Percentage of Lower Order Prefs Lodged by Applicants
(Compiled using data obtained from SATAC, 2003-2005)

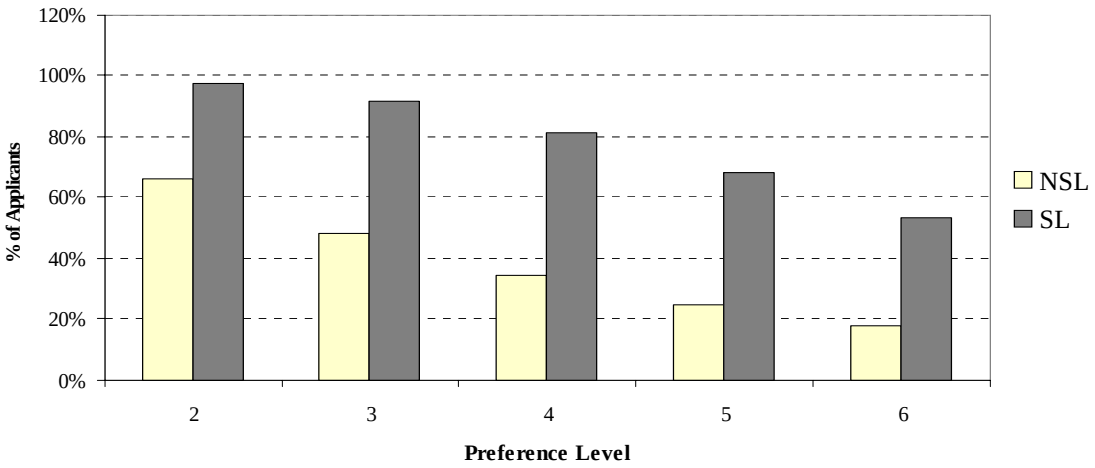
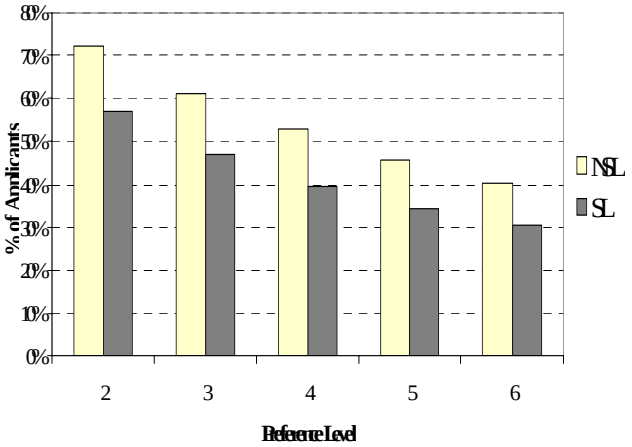


Figure 4: Average Percentage of Lower Order Prefs that are lodged Within the Same FOE as the 1st Preference
(Compiled using data obtained from SATAC, 2003-2005)



If this is in fact the case, then it creates the danger that a significant proportion of school leavers may find themselves dissatisfied with their choice of study. While the above figures suggest that some of these students attempt to resolve their problems by reapplying to gain entry into a more appropriate and better considered choice of study, it is possible that many are simply being lost through attrition. A poor choice of study may also create a frustrating experience of higher education, potentially damaging the prospects of a student's return to study in the future. At the very least, these data suggest that currently enrolled students may actually represent an important source of future students, and should not be overlooked in the recruitment process.

The final part of the analysis outlined in this paper involved a comparison of non school leaver applicants to each of the three universities in South Australia. As mentioned above applicants are permitted to lodge up

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to six course preferences, and there is no stipulation that these must be at the same institution. Consequently many applicants will preference at least two different institutions at some point in their choices. However if we take the first preference nomination as indicative of applicants' most preferred institution, then some level of comparison is possible.

Figures 5 and 6 below summarise the results of a comparison of mean age and gender of non school leaver applicants by institution of first preference. It is interesting to note that Adelaide university, the only Group of Eight (GO8) institution in South Australia, had a significantly younger mean age[10] and significantly different gender mix[11] than did applicants to the other two institutions. Indeed, first preference applicants to Adelaide were the only group examined in which the gender balance was other than approximately 60:40 in favour of females. In contrast, the mean age and gender proportions of non school leaver applicants to Flinders, an Innovative Research University (IRUA) and UniSA, an Australian Technology Network (ATN) institution, were much more closely aligned, although UniSA first preference applicants were still significantly older than those to Flinders.[12] This suggests that the perceptual gap between GO8 and non-GO8 institutions may be much greater than that between other university affiliation types; although examination of other states' applicant data to see if the same pattern of application is replicated would be necessary before such a claim could be made. Certainly it suggests that Adelaide university may be seen as an institution of choice for younger applicants, and UniSA as an institution of choice for older applicants. The recruitment choice that each institution then has to make is whether to pursue this apparent market differentiation or attempt to attract a broader range of applicants.

Figure 5: Mean Age by Institution of First Preference (NSL)

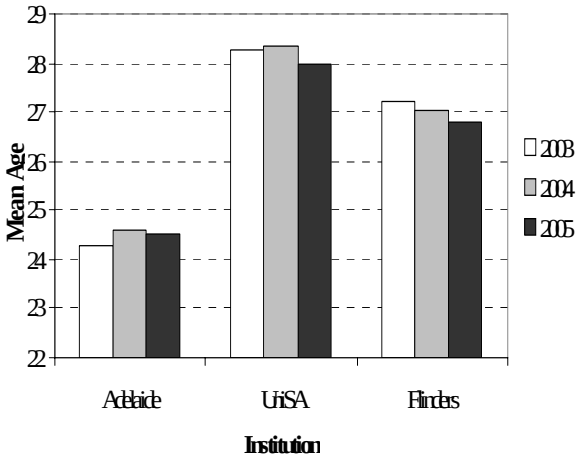
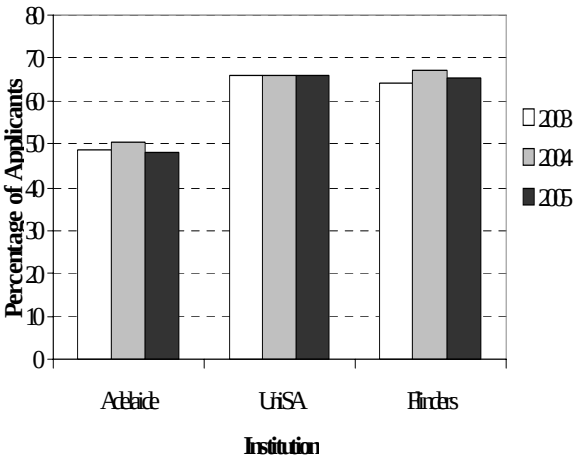


Figure 6: Female Applicants by Institution of First Preference (NSL)



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Conclusions

Preliminary attempts to profile non school leaver applicants to tertiary study in South Australia over the last three to five years suggest that the characteristics of actual applicants do not equate with anecdotally suggested common perceptions amongst university employees.

Firstly, the difference in preferencing behaviour between school leavers and non school leavers suggests that a distinction in the marketing material used to attract both groups of applicants may be the most effective approach, rather than a 'one-size-fits-all' model. If the primary focus of school leavers is simply to gain access to tertiary study in the first instance, then material highlighting extra-academic factors such as campus life, clubs and societies, the university environment and other social factors may prove most attractive. Certainly as we move into a more competitive environment, and students come to see themselves as valuable commodities with real choice between institutions, such factors may become increasingly important in choice of tertiary institution. In contrast non school leavers may respond better to program or discipline focused information, with a greater emphasis on academic issues, study support and expected employment outcomes.

The relatively young age profile of the South Australian non school leaver cohort has many possible implications. Firstly, the high proportion of tertiary transfer applicants suggests that universities should not ignore currently enrolled students as an important future resource, and should not exclude them from marketing and recruitment activities. However it also suggests that the satisfaction levels of first year students – particularly school leavers – should be closely monitored. Many universities already run regular surveys of their student population and so it could be a relatively simple matter to adapt the survey instrument where necessary to pick up the 'poor choice' students. Investing in efforts to ensure that these students are aware of their options may assist to lower attrition levels, or help to counter any negative perceptions of tertiary studies that may have arisen.

Finally, the finding that many non school leavers are applying for tertiary entrance so soon after completing their secondary studies suggests that current secondary students may also represent an important future source of non school leavers. While year 12 students are already the focus of a great deal of recruitment activity, much of this is directed at immediate tertiary entrance options. Expanding these activities to include information about longer term study options may also prove beneficial, if attempts to enter the workforce directly prove unsuccessful or unsatisfactory.

In the current climate of increasing sector competitiveness and legislative changes it is becoming increasingly important for universities to have a solid understanding of the best source of their future markets, to both ensure appropriate marketing and recruitment practices but also to ensure student satisfaction with the type of educational experience that they receive. While more detailed studies would be recommended to compile a more comprehensive profiling attempt, preliminary analysis of applicant data to tertiary study in South Australia reveals several findings that might have significant implications for more immediate recruitment practices.

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End notes

[1] Interstate and local international applicants tend to represent only small proportions of applicants to South Australian tertiary education, averaging only 7.8% and 1.9% of total applicants between 2003 and 2005. Data taken from the SATAC Statistical Handbooks, 2003-2005: Table 9A.

[2] Data taken from the SATAC Statistical Handbooks, 2003-2005: Table 9A. Non school leavers represented 54.9%, 55.7% and 54.0% of applicants and 57.8%, 57.3% and 55.3% of offerees in 2003-2005 respectively.

[3] Data taken from the SATAC Statistical Handbooks, 1999-2002: Table 9.1. Non school leavers represented 55.5%, 53.5%, 52.3% and 53.3% of applicants during 1999-2002 respectively.

[4] SATAC applicant data shows that female non school leavers in the years 2001-2005 comprised 60.1%, 61.1%, 61.4%, 62.6% and 61.4% of applicants respectively. It should be noted that years 2003 onwards refers to university applicants only, whereas the years 2001-2002 refers to applicants for both university and TAFE.

[5] Analysis of SATAC applicant data shows that female school leaver applicants to university in the years 2003-2005 consistently outnumbered male school leaver applicants at a ratio of approximately 60:40: females comprised 59%, 60% and 59% of applicants respectively. Similarly, female school leaver applicants to university or TAFE in the years 2001-2002 also outnumbered male school leaver applicants by a similar ratio: females comprised 59% and 58% respectively. Analysis by age group was not considered necessary since an average of 98% of school leaver tertiary applicants were aged 20 years or less in the five year period spanning 2001-2005.

[6] SATAC applicant data shows that non school leaver applicants to university in the years 2003-2005 consistently had a median age of 23 years; similarly applicants to university and TAFE in the years 2001-2002 had a median age of 23 years and 24 years respectively. Data obtained from SATAC.

[7] Figures obtained from SATAC applicant databases, 2001-2005. Non school leaver applicants aged 22 years or less represented 44.8%, 44.6%, 45.3%, 44.7% and 47.3% of all applicants during the years 2001-2005 respectively. Non school leaver applicants aged 20 years or less represented 30.8%, 31.0%, 30.7%, 30.5% and 32.3% of all applicants during the years 2001-2005 respectively.

[8] ABS data for the years 2001-2004 show that an average of approximately 80% of students undertaking year 12 studies in South Australia were aged 17 years. ABS (2004), Schools: Australia 2004, Tables 22 and 33; ABS

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(2003), Schools: Australia 2003, Tables 22 and 33; ABS (2002), Schools: Australia 2002, Tables 22 and 33; and ABS (2001), Schools: Australia 2001, Tables 22 and 33.

[9] SATAC database, 2003-2005. Most non school leaver applicants who are aged 20 years or less apply on the basis of completed secondary studies – 87%, 79% and 80% respectively.

[10] Analysis conducted via ANOVA, performed using SPSS version 13.0. F=515.637, df=2, p=0.00.

[11] Analysis conducted via ANOVA, performed using SPSS version 13.0. F=437.181, df=2, p=0.00.

[12] Analysis conducted via t-test, performed using SPSS version 13.0. t=10.019, df=1, p=0.00.