PROSPECTIVE UNDERGRADUATE UNIVERSITY STUDENTS IN NSW 2013

MARKET RESEARCH REPORT

RESEARCH CONDUCTED BY POLLINATE
PROJECT OVERVIEW

BACKGROUND
In 2013 the University of Sydney commissioned a research project to provide an understanding of the NSW tertiary education sector and its positioning within this market.

This research built on the *Prospective Undergraduate University Students in NSW 2011 Report* which was commissioned by the University of Sydney in 2011. The 2013 research sought to expand the initial findings of the 2011 report through obtaining a larger, more representative and reliable sample.

The research was conducted among prospective undergraduate students currently attending high school and focuses on the decisions they make about going to university. The broader research was extended to the University of Sydney’s other stakeholder groups including; other prospective students, parents of prospective students, HR managers, University alumni, current students and staff. *This report for the Department of Education and Communities reflects the findings of prospective NSW school students only.*

OBJECTIVES
The objectives of the research are to understand how prospective undergraduate students make decisions about tertiary education in 2013. Additionally, the research seeks to provide a snapshot of the current attitudes and ideas that prospective undergraduate students have about tertiary education. Specifically, the research was designed to:

- Identify the key influences in making the decision to go to university
- Understand who/which people influence prospective students and their decisions in going to university
- Understand the motivations and expectations of university study
- Understand the disciplines that prospective students are interested in studying at university.

METHODOLOGY
As in 2011, the research was conducted by Pollinate, a full service research consultancy.

As identified in 2011 recruiting prospective NSW year 12 students (aged 16 to 18 years) to participate in the research is difficult. People under the age of 18 years are less likely to participate in research and less likely to be a part of an online research panel. Pollinate – on behalf of the University of Sydney – submitted an application to the NSW Department of Education to approach schools directly in order to recruit research participants. This was approved by the NSW Department of Education in March 2013 and the research was conducted in July 2013.

SELECTING SCHOOLS TO PARTICIPATE
Using the Department of Education directory of approximately 800 schools in NSW, Pollinate contacted a random selection of 200 schools that represented the state population on dimensions including government/non-government, selective/non-selective, metro/regional and low socioeconomic status. Of these 200 schools, principals from 39 schools gave permission for their students to participate.

The final sample consisted of n=520 respondents. Students were given a $5.00 iTunes voucher for taking the time to complete the survey.

The schools that participated in the 2011 research were excluded in the selection of the 200 schools in 2013. The final sample for the research conducted in 2011 was based on n=61 students from 7 schools, and the results were not representative of the NSW prospective undergraduate student market and therefore limit the ability to compare the 2013 data to 2011. Therefore this research focuses on the results of the 2013 study only.

As per the agreement with the Department of Education, permission to conduct the study was granted providing that the privacy of the schools and students was protected. Accordingly, the names of the schools that participated in the study cannot be provided.
POTENTIAL BIASES

Although the 200 schools selected by Pollinate comprised a representative sample, the 39 schools that opted to participate in the research did not comprehensively match the NSW schools population. Respondent data was weighted by gender, location and anticipated ATAR to best represent the prospective NSW undergraduate student base. The weightings were calculated based on the average UAC 2009-2012 average scores and current ABS census data.

The objectives of the research were stated in the introduction to the survey to inform the students of the purpose of the study. As a result, students were aware of why the survey was being conducted which may have skewed the sample towards those that had an interest in attending university.

Although schools were instructed to not disclose the organisation conducting the survey, this was unable to be verified. Accordingly, some results may be influenced by knowledge of who was conducting the research.

Keeping these biases in mind, this data represents a snapshot of perceptions of prospective undergraduates. With continued measurement of this group over time trends will become more robust and validate findings.

KEY FINDINGS

PROFILE OF PROSPECTIVE UNDERGRADUATE STUDENTS

Schools that elected to participate in the research provided 520 responses from across NSW.

Students were aged between 16-19 years. Three-quarters of those who participated were aged 17.

Males made up 54% of the sample and females 46%. In the analysis, this was weighted to match the ratio of males to females amongst 16-19 year olds in NSW.
Students from metro areas represented 55% of the sample while regional students made up the remaining 45%.

![Location of participants chart](chart1)

Students attending government schools made up 68% of the sample with the remaining 32% being drawn from non-government schools.

![School composition chart](chart2)

Students from selective schools made up 22% of respondents and the remaining 78% consisted of students drawn from non-selective schools.

![Selective school composition chart](chart3)

Those from low SES schools represented 27% while 73% were not from a low SES school.

![Socio-economic status of schools chart](chart4)
PREPAREDNESS FOR UNIVERSITY STUDY

Almost all prospective NSW students have a clear idea or some idea of their interest in studying at university. Among metro students, 31% claimed to have a clear idea while 53% of regional students claimed to have a clear idea. This suggests that metro students are less certain about what they want to study than their regional counterparts. This may be due to metro students having greater awareness and access to tertiary options resulting in greater choice and less certainty about what areas of study are of interest.

Only a small fraction has not thought about which area of study interests them, suggesting that most are aware of the importance of having an interest in the area studies at university.

Close to two-thirds of prospective NSW students are looking to study at university on a full-time basis.
However, those from low SES schools have a greater preference for part-time study compared to the overall prospective students. This suggests that they are looking to balance tertiary education with external commitments such as employment.

A similar proportion of prospective NSW students are considering studying for 3 years as are considering studying for 4 years. However, 1 in 4 still state no strong preference, suggesting that course duration is not an important factor in selecting which course to complete.
DISCIPLINE AREAS OF INTEREST

The disciplines that prospective students are most interested in studying at university are business, commerce, marketing and management followed by education, teaching and training. Dentistry and aboriginal and indigenous studies gathered the least interest. Encouragingly, only a small fraction claims they don’t know which area they are interested in studying. This proportion is in line with those that stated they had not yet thought about studying.

Which of the following discipline areas are you particularly interested in studying at university? Please select UP TO FIVE areas.
When asked to nominate their most preferred subject, business, commerce and marketing were again the most popular. Males had a higher preference than females for studying engineering and project management as well as information technologies. Compared to males, females preferred to study education, teaching and training and nursing.

Areas of study – most preferred subject by males and females
INFLUENCE ON DECISION-MAKING REGARDING UNIVERSITY STUDY

Prospective NSW undergraduates consider themselves as the main influencer on which university to attend. The next most important influencers are parents, followed by educational contacts such as career advisors and teachers.

Regional students place greater focus on themselves as influencers compared to metro students. Just as regional students appear to have a clearer idea of their interest in studying, this may also be a result of metro students having greater awareness and access to tertiary options, resulting in less certainty.

Metro students also see the influence of peers as more important than regional students as they are more likely to maintain their social group between high school and university. High profile graduates are more influential for metro students than regional students. This may be due to prospective metro students having greater exposure to high profile graduates, such as in the media, as a result of their closer proximity to metro universities.
The most popular source of information for prospective NSW undergraduates are university engagements such as open days, websites and school visits. The next most used sources are course-related materials such as the UAC guide, career expos and course guides, followed by public information and opinion channels.

Prospective students from metro regions are more likely than regional students to look at more information sources overall as well as social media and generic websites. This additional information-seeking may indicate students from metro regions seeking further clarity; or alternately this additional information may be contributing to greater uncertainty compared to regional students.

*Social media includes blogs and forums. *Generic websites such as The Good Uni Guide, Hot Courses, MyUniversity
POSITIONING OF UNIVERSITIES

The universities with the highest total spontaneous awareness among prospective NSW undergraduate students tend to be those based in NSW. The University of Sydney has the highest top of mind spontaneous awareness followed by the University of New South Wales (UNSW) and the University of Western Sydney. When prompted with a national list, close to three quarters state they are aware of the University of Sydney.

Females tended to mention an average of 13 universities which was higher than the average of 9 mentioned by males.
Advertising awareness is highest for the University of Sydney and UNSW. This mirrors the awareness of universities amongst prospective students, which suggests that no university advertising particularly stands out and students are responding to brand presence.
IMPLICATIONS

Females are aware of more universities than males, suggesting a higher likelihood to attend university. This is in line with the Federal Department of Education’s Higher Education Student Statistics\(^1\) which state that females make up the majority of commencing students at universities. Further observation of this trend is recommended to identify if there is an underlying reason why males are less likely to enrol in university.

Compared to metro students, a greater proportion of regional students have a clear idea of their interest in studying, and consider themselves as the main influencer on deciding which university to attend. This may be due to metro students being inundated with awareness, access and ultimately choice for what and where to study which may contribute to greater uncertainty compared to regional students.

Students state that they are the most important influence on deciding which university to attend, followed by their parents. Interaction directly with the university through open days, websites and school visits are considered the primary sources of information for the prospective students. This suggests that universities play an important role in engaging with prospective students and parents, and helping them to be aware of what universities have to offer and which to attend.

The University of Sydney hopes to repeat this study in 2015, allowing us to track any changes from this round of research. Further tracking would enable us to identify how the market and student preferences change in the coming years as the landscape and demand for tertiary education changes.