
Research Report

Higher Education enrolment growth, change and the role of Private HEPs

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Introduction

The Bradley Review of Australian Higher Education, carried out in 2008 presented an opportunity to the Commonwealth Government to refocus higher education on the national agenda (Bradley, Noonan, Nugent, & Scales, 2008). To a certain extent, Bradley and the policies that it influenced have achieved this. However, more than four years after the Review was completed, we still have very few ideas about what shape our higher education system will assume once these policies are fully implemented. Political uncertainty related to the very recent change in Government further confuses the situation at present. This paper offers a mapping of change in higher education enrolments through the 2009 to 2012 period. It examines the massive growth in the system during this time and the extent to which this growth was distributed – by student enrolment characteristics, demographics and importantly by type of higher education provider (HEP).

The intention of this research is to provide a snapshot of the higher education sector captured using the most recently available data, and to contextualise the potential role that could be played by non-university higher education providers in future expansion of the system. The work draws on data from the Commonwealth Government's Higher Education Statistics Collection. Detailed data was specified for this project and a number of unique outputs were provided for the purpose of the analyses in this project.

This paper begins by outlining some background and policy contexts, highlighting Government targets and policies relating to enrolments in higher education. It then explores in detail the overall enrolment changes in the sector, with some emphasis on presenting data by provider type. It finishes by exploring the future for higher education in Australia by examining the current situation relating to the key targets for expansion and widening of access and looking at how these might be achieved, again with emphasis on the roles of different providers in the sector.

Background

The past few years in higher education enrolments in Australia have been dominated by change: changes in funding allocation, changes in enrolment numbers, changes in Higher Education Minister (too many to count), and changes in regulation and accreditation. However, during this time of change, providers of higher education have continued to enrol, teach and graduate students. It is the numbers of these students, their characteristics and the extent to which they will continue to enrol in the sector (and who with) that is of interest to this paper.

The recent changes in higher education most relevant to this paper are encapsulated in an “expansion agenda”, in which two key targets recommended by the Bradley Review are paramount:

- that 40 per cent of 25-34 year olds will have a bachelor degree or above by 2025; and

- 20 per cent of undergraduate enrolments will be from low socioeconomic backgrounds by 2020.

While legitimate questions may be asked about the merit of setting targets, particularly given the attention and focus that it has generated around the future of higher education in Australia, Bradley's message about these targets appears to ring true: 'Setting targets for the achievement of any goal does not of itself ensure that the goal is achieved. However, it can help. Setting targets that are clear and transparent can focus the mind of policy makers on what needs to be done to achieve the target and can help the community to hold policymakers accountable' (2008, p. 19).

Facilitating this expansion in enrolments and access were a number of policies, the most influential of which was the introduction of a student demand-driven funding system, whereby funding for university followed student demand rather than universities having a specific allocation of funded places. The policy, as articulated by the Government at its introduction was:

From 2012, Australian public universities ... will be funded for student places on the basis of student demand. The government will fund a Commonwealth supported place for all undergraduate domestic students accepted into an eligible, accredited higher education course at a recognised public higher education provider (Australian Government, 2009, p. 17).

As noted in the quote, this policy related only to public providers of higher education. While the Bradley panel recommended expanding the demand-driven system to all accredited higher education providers once regulatory measures were in place, to date there has been little commitment publicly towards this happening. This particular point is of key interest to Private higher education providers, TAFEs and to the peak bodies which represent these providers.

The role of this policy in the expansion of university enrolments is detailed in the following section. The parallel growth in other providers (Private, TAFE) is also tracked in these analyses. The influence of this change on the achievement of the two targets is then explored at the end of the section.

Quantifying growth

Undergraduate enrolments for domestic students in Australia have grown at a remarkable pace over the past few years. Figure 1 which charts the commencement numbers from the beginning of this century, to 2012, shows a sharp rise in the trajectory of enrolments in the last four years of this time series. To further show the relative scale of the recent growth, Figure 2 highlights the difference in enrolment change in the 2009 to 2012 period compared with changes in the two four year periods prior to this. The 2009 to 2012 period has seen an increase in commencers of 43,600, or 21.3 per cent. By contrast the 2001 to 2004 period experienced a decline in commencers (by 6.7 per cent) and the 2005 to 2008 period saw more modest growth of 7.8 per cent in commencements.

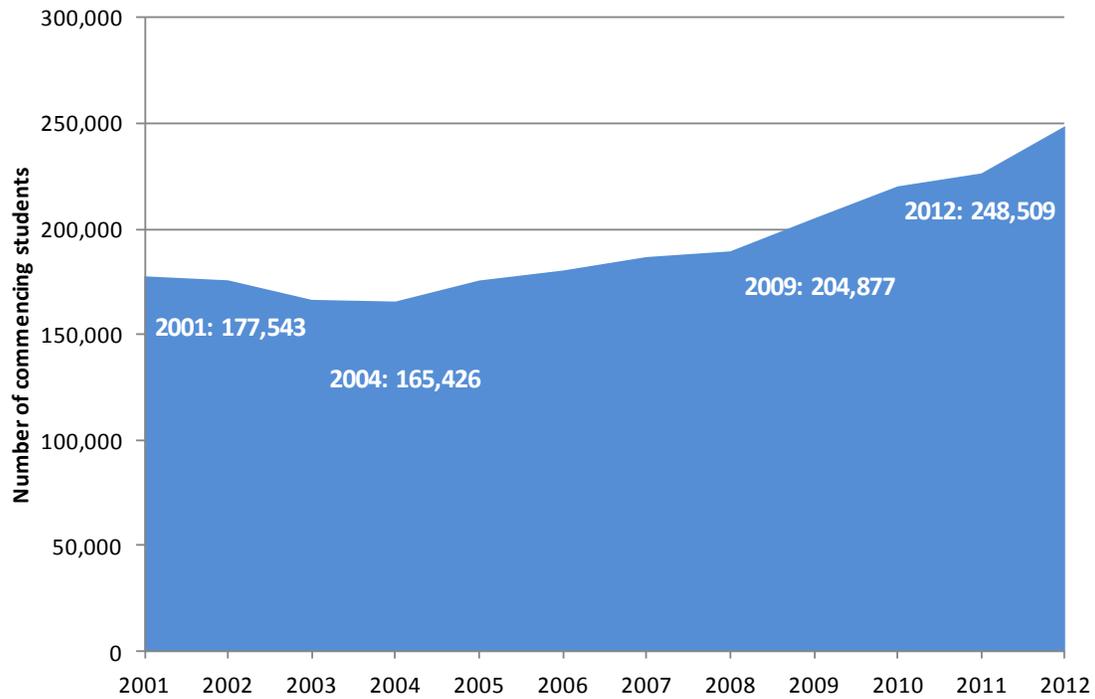


Figure 1: Domestic undergraduate commencements, Australia, 2001 to 2012

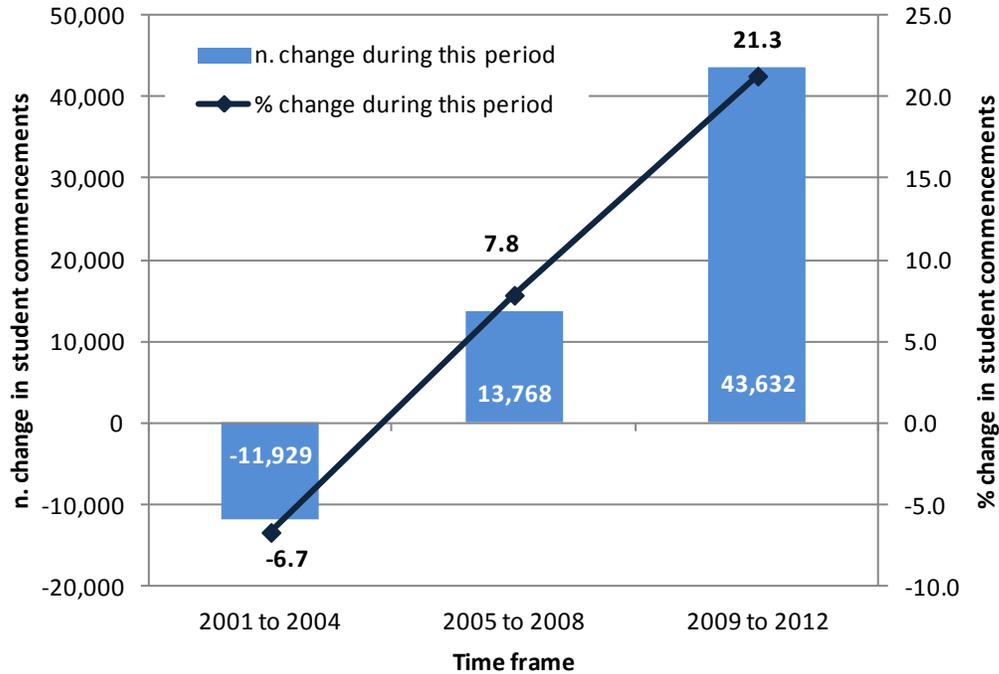


Figure 2: Change in domestic undergraduate commencement numbers between selected years (n. and % change)

The year 2009 is an important reference point in tracking enrolment change because this is the year in which the policy of demand driven funding was announced. As such, the time series comparisons which follow are based on quantifying change as of 2009. This year marked the last year in which the previous ‘status quo’ in enrolments among public universities (Table A providers) was in place. In the years following 2009, universities were given the opportunity to begin to prepare for the uncapped student demand-driven funding system which began in full in 2012. The ‘preparation’ for the full funding in 2012 was characterised by the softening of government caps or quotas on the number of students that each university could enrol, so in 2010 and 2011 universities received funding for each student enrolled up to 10 per cent above the cap applied by Government at the time. As documented elsewhere (Edwards, 2011c), many universities enrolled well above this limit, absorbing the costs of having non-funded places but establishing a new student base in preparation for the introduction of full demand-drive funding in 2012.

Table 1 documents the numbers of domestic undergraduate commencers and the total number of enrolments for each year from 2009 to 2012 by provider type. For the purpose of this paper, provider types displayed here are ‘Table A’ – public universities; ‘Table B’ – private universities; ‘Private’ – private, non-university higher education providers; ‘TAFE’ – TAFE institutes providing undergraduate courses. Detail relating to provider categories in higher education is detailed in the Higher Education Standards Framework legislation (“Higher Education Standards Framework (Threshold Standards),” 2011) and some further information about Australian higher education providers is included in Appendix A.

Based on the data provided by the Commonwealth Government for this research, there were 37 Table A, 3 Table B, 66 Private and 8 TAFE providers with domestic student enrolments in undergraduate higher education qualifications in 2012 (as Appendix A shows, in total there are more providers than this, but only those with undergraduate enrolments in 2012 that are recorded in the official statistics are included in this paper). In absolute numbers, it is possible to see that Table A providers accounted for nearly 41,000 of the 43,600 growth in commencers and 81,500 of the total enrolment change in undergraduate enrolment of 91,000. In terms of relative growth by provider type, the TAFE enrolments saw a large percentage increase in enrolments and commencements during this time. However, this growth was coming from a very low base.

Importantly, the figures show that while Table A providers absorbed the majority of the growth in this period, the other types of providers also grew. Figure 3 shows the non-Table A provider groups change in commencers over this period, also highlighting the relative size of the Private providers among the non-Table A providers. From 2009 to 2012, Private providers experienced a growth of 11.4 per cent in commencements and 22.5 per cent growth overall. Further exploration of the share of enrolments and commencements across the sectors is detailed later in the paper.

Table 1: Domestic undergraduate numbers 2009 to 2012 by provider type – commencements and all enrolments

Provider type	2009	2010	2011	2012	Change 09 to 12	
Commencers (n.)					n.	%
Table A	187,921	201,540	207,480	228,747	40,826	21.7
Table B	3,480	3,567	3,631	3,614	134	3.9
Private	12,860	13,750	14,622	14,324	1,464	11.4
TAFE	616	1,248	1,101	1,824	1,208	196.1
Total	204,877	220,105	226,834	248,509	43,632	21.3
All enrolments (n.)						
Table A	558,364	585,175	605,413	639,876	81,512	14.6
Table B	9,419	10,292	11,226	11,536	2,117	22.5
Private	25,434	27,446	29,626	31,096	5,662	22.3
TAFE	1,186	1,929	2,219	2,946	1,760	148.4
Total	594,403	624,842	648,484	685,454	91,051	15.3

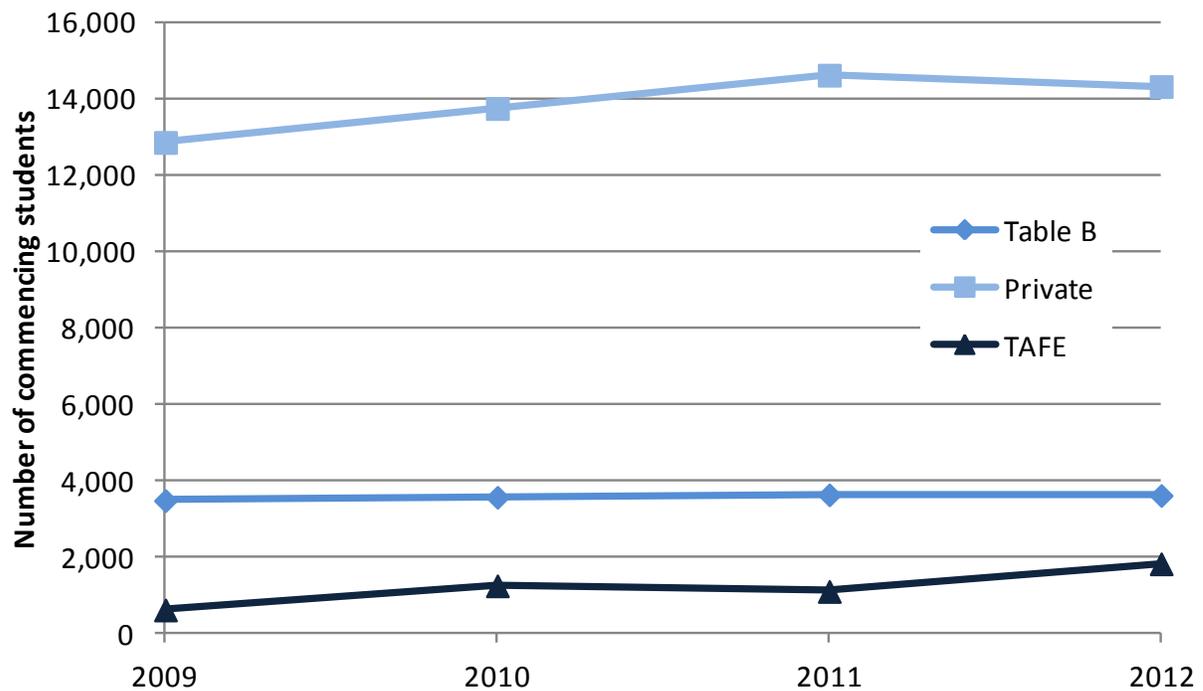


Figure 3: Domestic undergraduate commencement numbers in non-Table A providers, 2009 to 2012

Growth and 'quality'

In the context of the growth in the system and the expansion in line with policy targets, there have been concerns raised relating to the extent to which quality is compromised through growth. While there is an absence of strong data to support or dismiss these questions categorically, this section of the paper utilises a couple of measures available to explore whether growth in enrolments has had an impact. Information about ATAR, attrition, and student-staff ratios were considered for exploration in this section. Due to lack of concrete data on the last of these elements, only the first two are analysed here. What follows is essentially an indicative analysis, but nonetheless it offers some insight into whether there has been change in these variables at the same time as there has been growth in the system.

For the purpose of this analysis, only data relating to the Table A institutions is included. In addition, data from the six fastest growing universities between 2009 and 2012 has been extracted and displayed separately to offer additional insight into the role of growth here. Each of these six universities had growth in excess of 40 per cent between 2009 and 2012 - more than twice the national average.

Figure 4 shows different groupings of ATAR for commencers in all Table A universities from 2009 to 2012. It is important to note here that only about half of the commencers in each of the years here actually have an ATAR recorded in the data. Among the Table A commencers with an ATAR, overall commencement numbers increased by 16.7 per cent between 2009 and 2012.

The data shows a very small rise in the share of ATARs under 50 (from 3.1 per cent to 4.2 per cent), among all those with an ATAR under 60 (from 9.7 per cent to 12.3 per cent) and for all commencers with an ATAR under 70 (24.6 per cent to 27.4 per cent). As a result, a slight decrease in the proportion of all commencers who had an ATAR above 80 was recorded (53.8 per cent in 2009 to 51.7 per cent in 2012).

Given the nature of the ATAR – it is essentially a percentile rank of a given age cohort – it is inevitable that if more applicants enter the system the overall spread of the ATAR will trend downwards. What this overall data shows is that even in a period where enrolment growth has been substantial, the impact on ATAR scores across the Table A institutions as a whole is relatively small.

Among the six high growth universities, the percentage point change in ATAR distribution was slightly larger than that for the sector as a whole. However, the differences were not found among the lowest ATAR grouping shown in Figure 4; the proportion of commencers with an ATAR under 50 increased by only one percentage point in this time. Where the change in these institutions is different to the national trend is in the students with moderate ATARs. For example, the proportion of commencers in these six universities with an ATAR of 60 or below increased from 11.9 in 2009 to 14.3 per cent in 2012 (a 4.4 percentage point change). Most telling is the difference in the share of those with an ATAR under 70, which rose from 31.6 to 38.9 per cent (a 7.3

percentage point increase). This suggests notable increases in the 60 to 69.95 ATAR band for this group of institutions during this time.

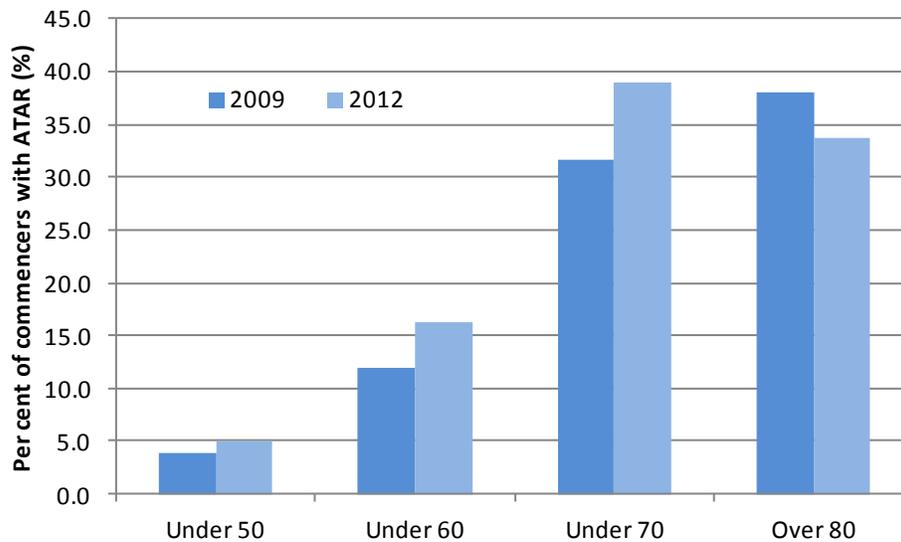


Figure 4: ATAR distributions for domestic undergraduate commencers 2009 and 2012, in the six fastest growing Table A universities

While there is no doubt a relationship between ATAR and the ‘quality’ of students, the extent to which it is possible to identify a point at which ‘quality’ diminishes by ATAR has not been empirically determined. Indicative figures show that the higher an ATAR the more likely a student is to complete their course (Norton, 2013), but the cohort on which this work is based (commencers in 2005) began their studies in a very different higher education sector, in a relatively different economic and social climate to what students have today.

The conclusion from the work for this paper is that while there is some evidence to show a change in ATAR scores in the cohorts entering the fastest growing institutions, this change is not occurring rapidly among the very low ATAR students and it is difficult to determine the extent to which this change suggests any noticeable diminishing of quality across the system or in the high growth universities.

Another proxy to explore the impact of growth on quality of provision in Australian Table A universities is through attrition rates. The time series shown in Figure 5 shows that between 2008 and 2012 there has been only small movement in attrition rates among all Table A universities. In addition, among the high growth institutions, the average rate while slightly higher than the national average, declined from 2008 to 2009, and remained relatively stable during the large period of growth from 2009 onwards.

These indicative findings suggest that the impact of growth in higher education institutions has not had any significant influence on quality in terms of achievement prior to entry or on the likelihood of completing first year.

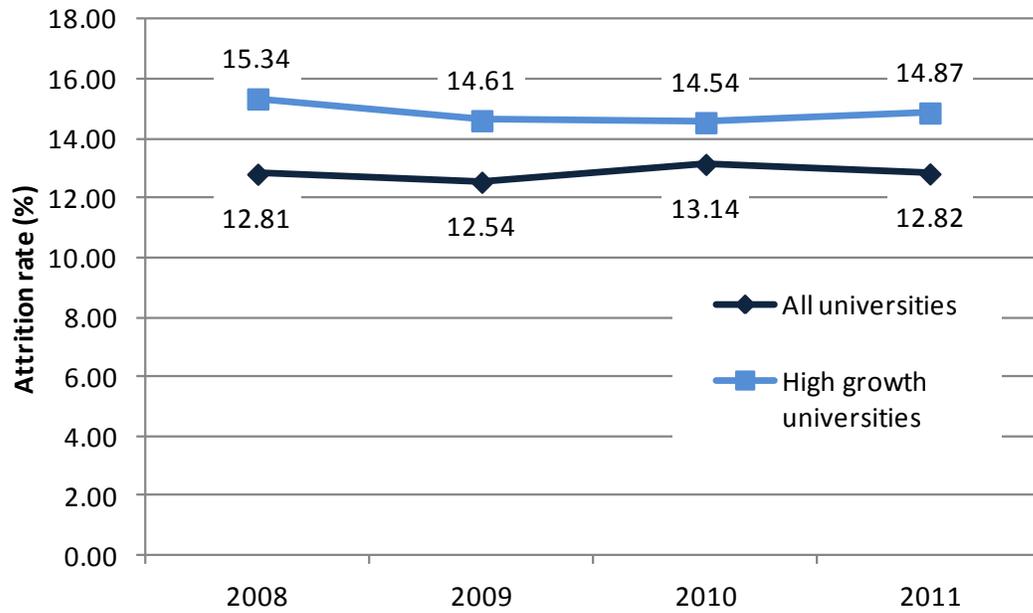


Figure 5: Attrition rates of commencing student in first year of university, all Table A and six high growth universities, 2008 to 2012

Characteristics of students by provider type

The growth in commencements to 2012 has led to some changes in the overall characteristics and types of students enrolled in undergraduate courses in Australia. In this section a range of student characteristics are examined. The focus here is generally on the 2012 commencement cohort and differences between providers.

Based on the data provided by the Commonwealth Government for this research, in 2012 non-Table A providers accounted for 8 per cent of commencing domestic undergraduate students. Of all commencers 5.8 per cent were at a Private provider and these providers enrolled 4.5 per cent of all enrolled domestic undergraduate students in Australia (Figure 6). As the pie charts show, the vast majority of enrolments are in the Table A, public university part of the sector.

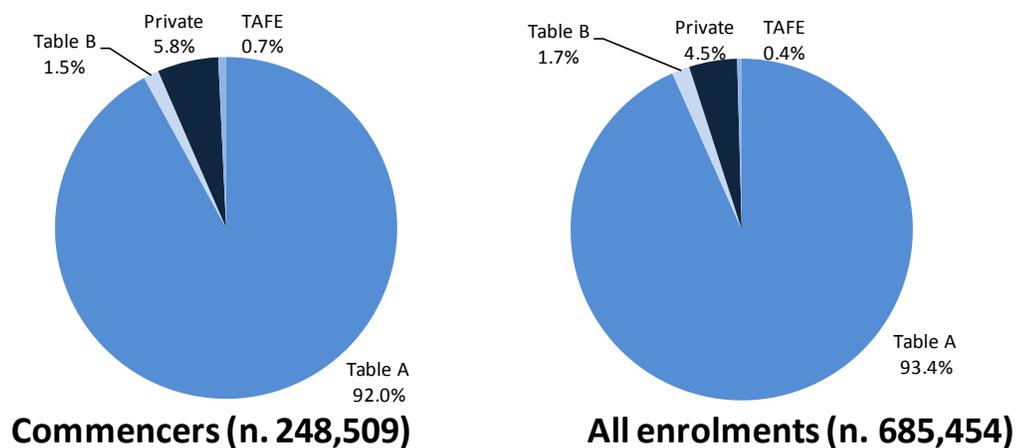


Figure 6: Distribution of commencing and all domestic undergraduate students by provider type, 2012

An important element apparent in the higher education data for contextualising the differences in the sector is course-level emphasis by provider type. Figure 7 shows a substantial difference in the distribution of commencements by course type between Private providers and other HEPs. Essentially, Private providers have a smaller share of bachelor enrolments and more ‘other undergraduates’ among their undergraduate commencers. Other undergraduate courses aggregated in the higher education statistics include higher education accredited Associate Degree, Advanced Diploma, Diploma and ‘other’ qualifications. These figures do not include VET-linked qualifications of the same name (Diploma and Advanced Diploma) and do not include enabling courses or non-award, bridging courses provided by HEPs. In total, 35.8 per cent of all the recorded undergraduate commencers in Private providers in 2012 were enrolled in non-Bachelor undergraduate qualifications. In Table A providers, the relative figure was very small at 3.9 per cent while nearly one in five undergraduate commencers at a TAFE were in one of the ‘other’ qualifications.

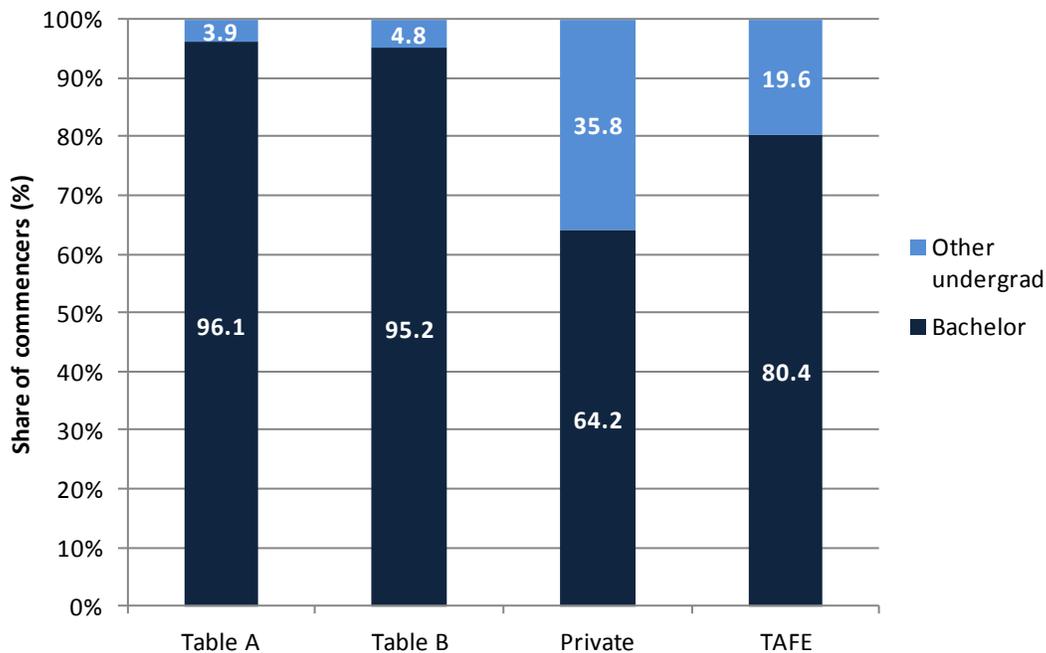


Figure 7: Distribution of undergraduate course type by domestic commencers and provider type, 2012

Another important difference between the provider types is the distribution by the educational pathways students have taken prior to enrolment. The distribution of commencers by basis of admission shows that while secondary school is the most common pathway for Table A, Table B and Private providers, those entering a higher education qualification at TAFE are more likely to have been admitted on an ‘other’¹ basis. Private provider commencers are also more likely to have come through an ‘other’ pathway. These providers also have a relatively large proportion of students gaining entry through mature age special entry provisions. These outcomes link in with the fact that overall, university commencers tend to be younger than those in Private providers and TAFEs, with 58 per cent of Table A commencers, 43 per cent of Private provider commencers and 32 per cent of TAFE commencers aged under 20 years old.

¹ ‘Other’ modes of admission include assessment of folio, entry-based interview, aptitude test or other special admissions scheme.

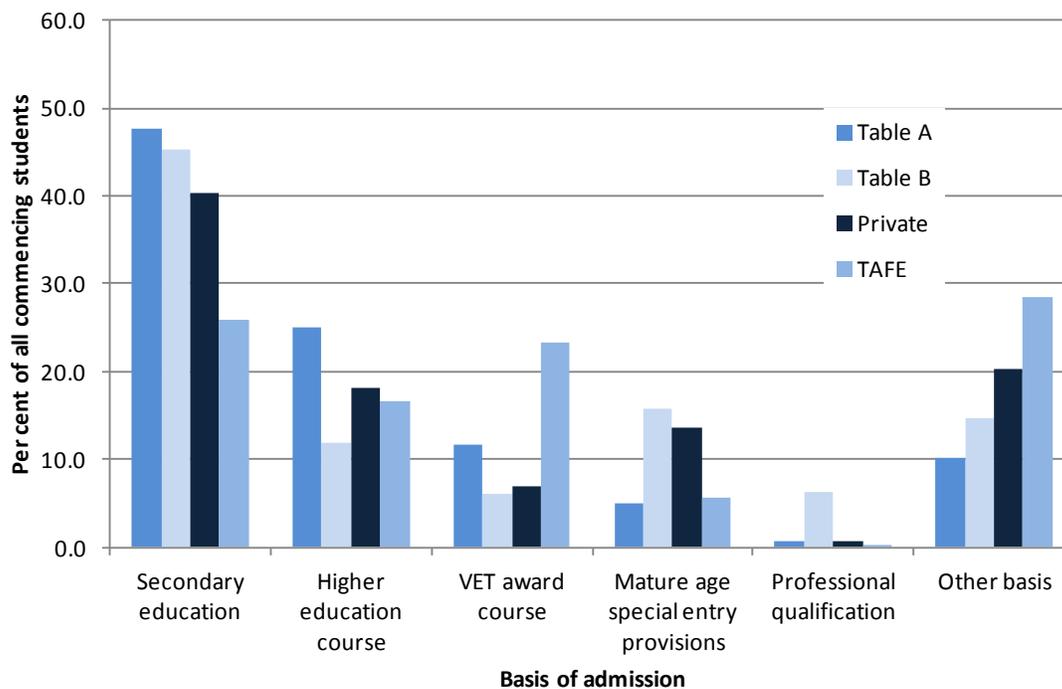


Figure 8: Distribution of domestic undergraduate commencing students by basis of admission and provider type, 2012

There are noticeable differences between the provider types when enrolments are examined by discipline. In Figure 9, the distribution of commencing students in 2012 is displayed by broad field of education. The data show that the most heavily enrolled fields for Private providers are Creative Arts (33 per cent of domestic undergraduate commencing students), Society and Culture (25 per cent), and Management and Commerce (23 per cent). Fewer than one per cent of commencements in Private providers were in the field of Science. TAFEs also have strong enrolments in Management (21 per cent) and in Creative Arts (19 per cent), but differ from Private providers in their relative size in Engineering (16 per cent), IT (10 per cent) and Architecture fields (9 per cent). Interestingly, TAFEs had no commencing students recorded in the Society and Culture broad field in 2012. In Table A universities the most common field is Society and Culture (26 per cent), followed by Management and Commerce (17 per cent) and Health (16 per cent). Eleven per cent of Table A enrolments are in the Sciences – a field where the other types of providers have very few students.

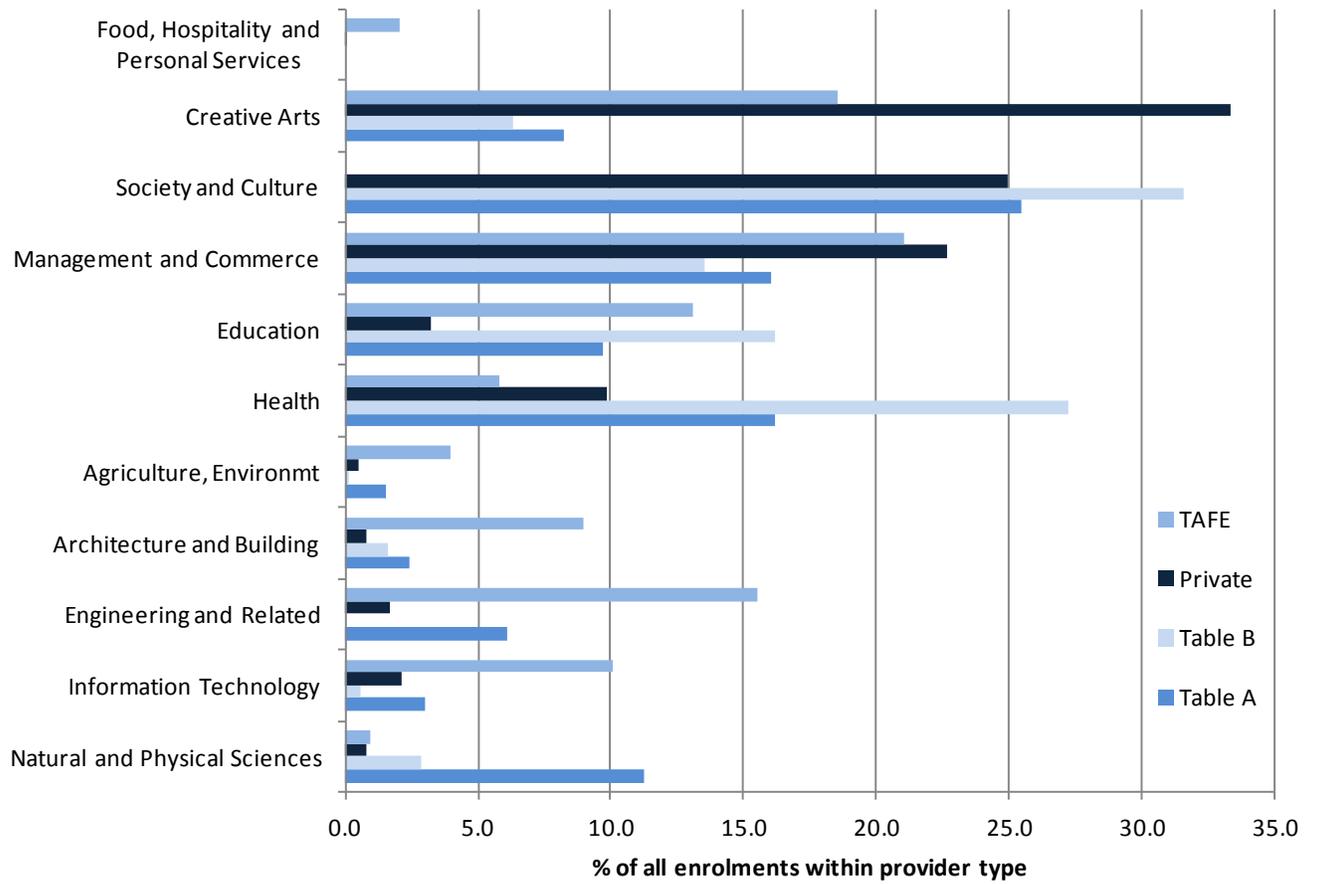


Figure 9: Distribution of domestic undergraduate commencers by broad field of education and provider type, 2012

Examining the differences between providers in terms of the ATAR of students commencing is also interesting, especially in the context of discussion around quality and potential issues with quality in an expanding system. The quality questions are addressed later in this paper, while here the state-of-play in 2012 is examined. As a caveat, it is important to note that fewer than half of all commencing students in 2012 have an ATAR recorded in the higher education data. As shown in Figure 10, the proportion of students outside of the Table A universities is very small, meaning that comparisons across provider types are not particularly useful on the whole. With this large caveat in mind, the data in Figure 11 shows the distribution of ATARs by selected bands across provider types for the commencing students who did have an ATAR recorded.

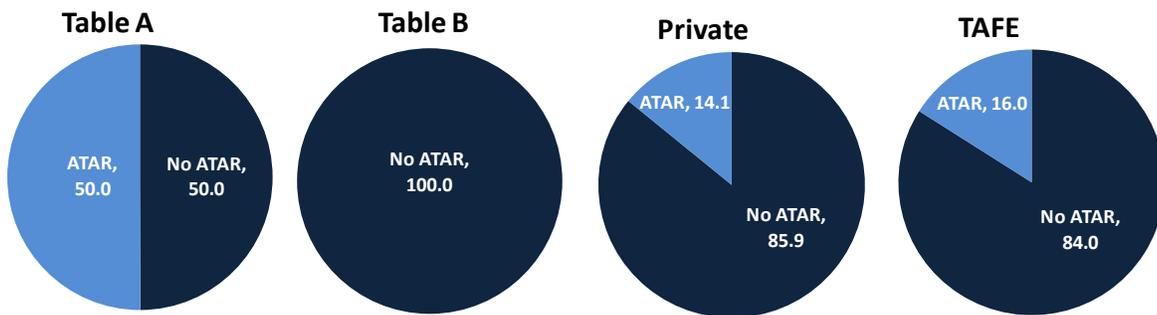


Figure 10: Proportion of domestic undergraduate students with ATAR by provider type, 2012

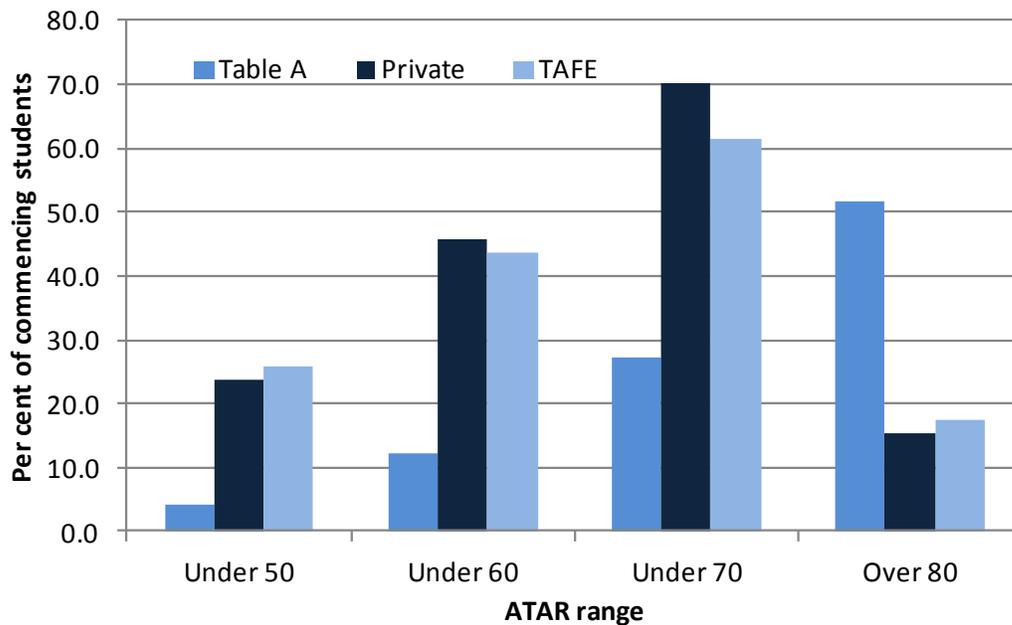


Figure 11: Distribution of domestic commencing undergraduate students by ATAR score groupings and provider type, 2012

The final figure in this section explores the SES background of the commencing undergraduate cohorts by provider type. The distribution of students by SES quartile is shown in Figure 12. The data show that Table A universities have the highest representation of enrolments by students from the lowest SES quartile (18.2 per cent of commencers in this data), followed by Private providers (16.5 per cent). At the other end of the spectrum, 41 per cent of Table B commencers were from the highest SES quartile in 2012, followed by 36.9 per cent of undergraduate commencers at TAFEs. In all provider types, this high SES quartile was over-represented in enrolments (full representation would be 25 per cent).

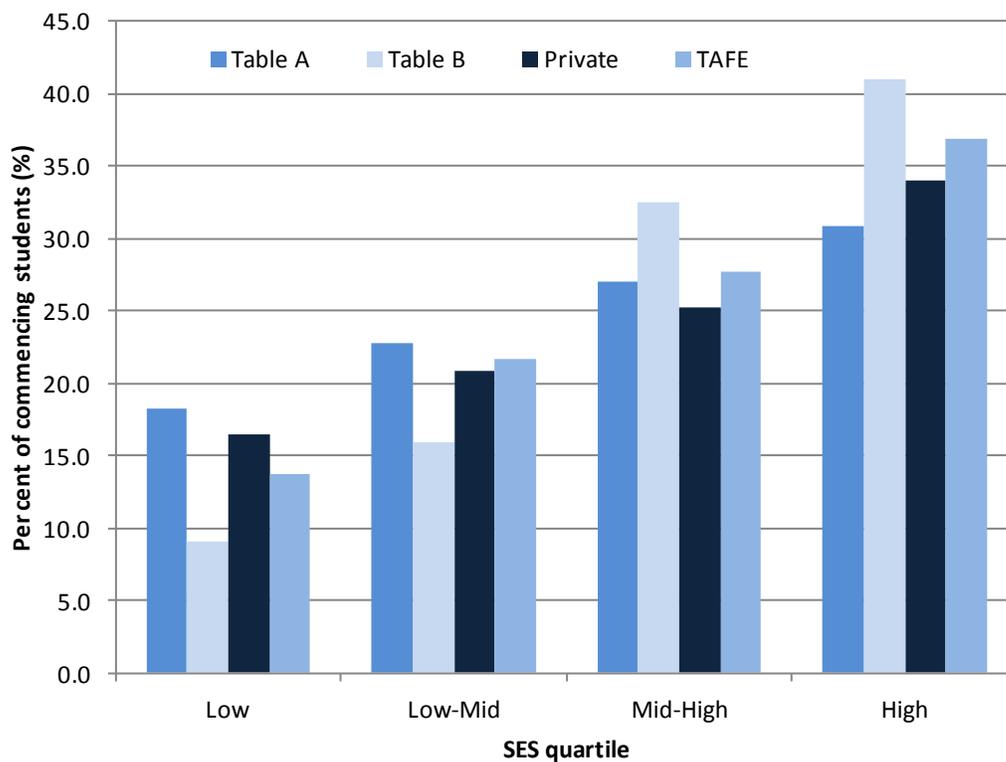


Figure 12: Domestic undergraduate commencing students by SES background and provider type, 2012

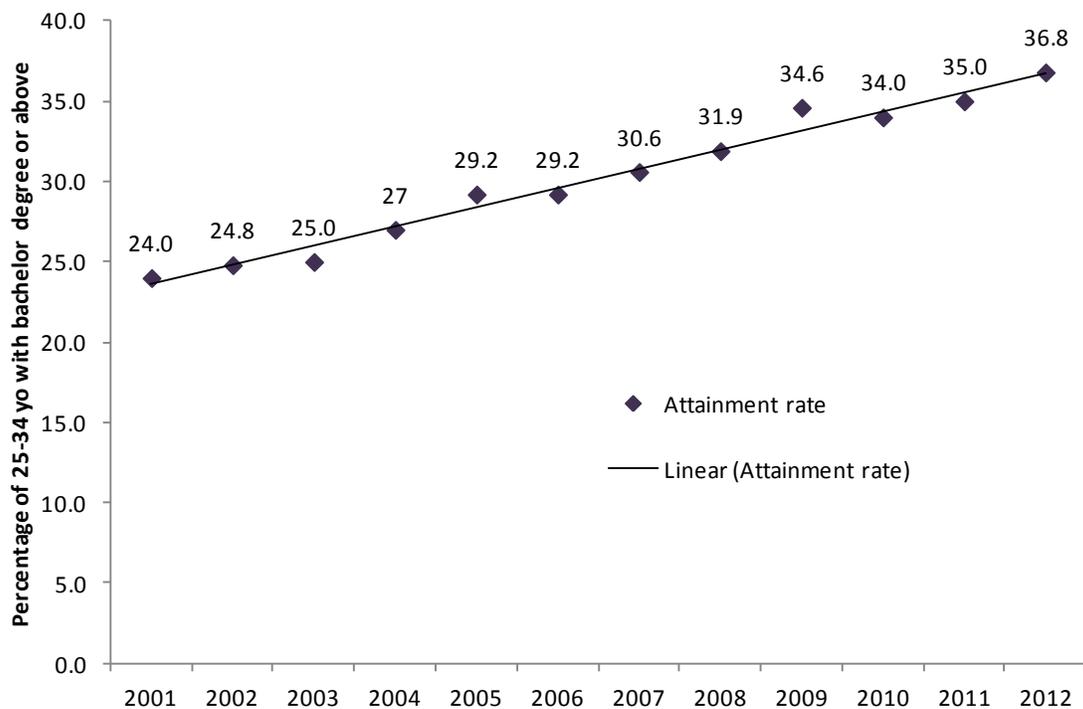
Private providers contributing to growth

The data presented above has helped to highlight the similarities and differences between universities and other higher education providers. It is clear that the university part of the sector does and will continue to dominate the overall share of enrolments in higher education. However, it is notable that in the context of the past few years, when all the policy incentives were in place for promoting growth in public universities, the other providers of higher education in Australia continued to grow. As shown above, Private providers experienced a 22.3 per cent overall growth in enrolments between 2009 and 2012. This highlights the fact that Private providers are serving a key constituency of students who clearly value the courses they are offering (otherwise one would expect that a Government subsidised university course would be preferable to a fee-based course).

A key question posed in the development of this paper is whether there is a greater scope for Private providers and TAFEs in the provision of undergraduate education in Australia, and linked to this, whether the introduction of Commonwealth Supported Places in these providers would stimulate a further expansion of the system and facilitate the achievement of both the attainment and the low SES access targets. This section of the paper explores these issues. It looks at the extent to which the targets are being met, the existence of unmet demand in the system and at potential areas in which Private providers might facilitate enrolments where universities cannot or do not.

Meeting the attainment target

Figure 13 charts the attainment rates of the 25 to 34 year-old population in Australia over the past 12 years. The attainment rate is calculated based on all those within the age range who have completed a bachelor degree or above. Those qualifications could have been gained from any type of higher education provider. The figure details a remarkable rise of more than 12 percentage points, from 24.0 per cent in 2001 to 36.8 per cent in 2012. In all but one point in the series from the ABS Survey of Education and Work there has been an increase in attainment. A trend line has been included in this figure to provide an indication of the average trajectory during this time.



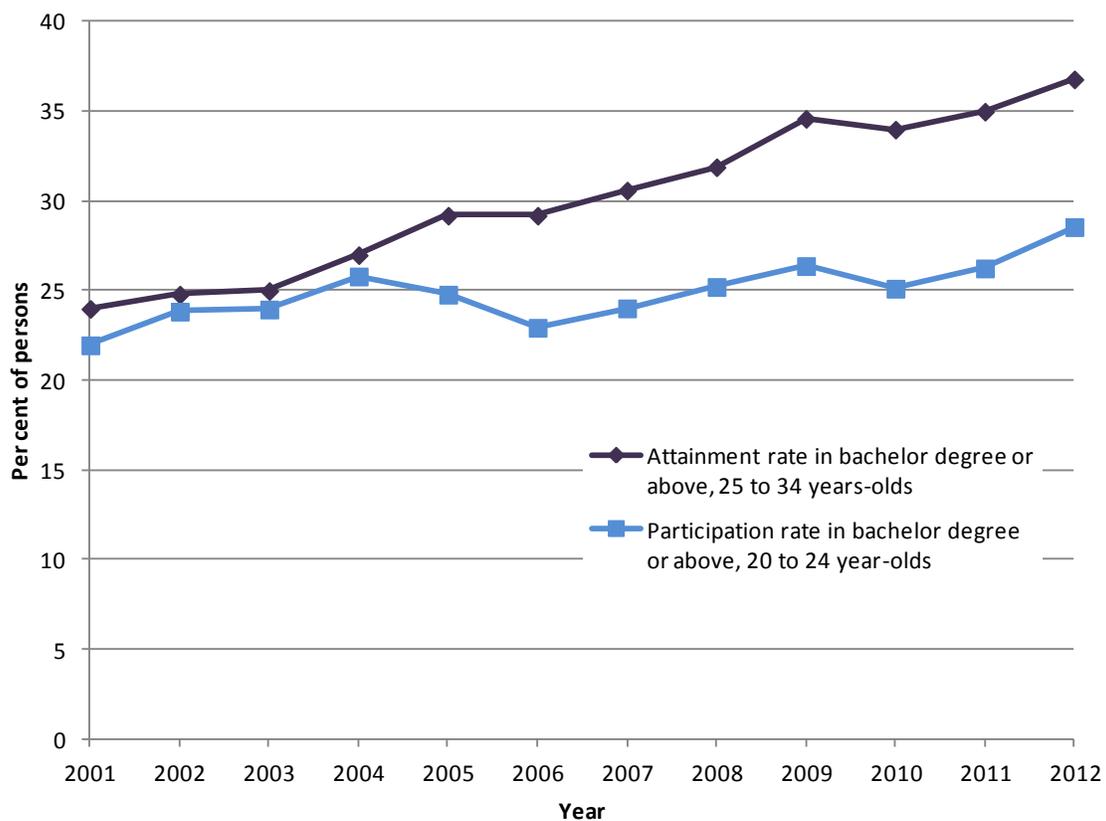
Source: ABS Survey of Education and Work 2001 to 2012.

Figure 13: Bachelor level Attainment rates of 25 to 34 year-olds in Australia, 2001 to 2012

Presented in terms of percentage point gain and over a 12-year period, the achievement of the 40 per cent attainment target appears to be relatively straightforward. When the recent trajectory of growth in the attainment rate is considered, it is possible to conclude that these targets will be easily reached, if not outstripped by 2025. A conclusion along these lines was made in a paper by the Group of Eight that states ‘a continuation of the recent

trend growth in degree attainment would see the Government's 40 per cent target for the 25-34 year group exceeded by 2015' (2010, p. 2). While this conclusion is appealing, an examination of national attainment level trends over recent years does not provide the full picture of likely future attainment rates.

Figure 14 provides a reality check and a context for understanding the drivers of attainment in Australia over the past decade. The figure tracks both the 25 to 34 year-old attainment rate from 2001 to 2012 alongside the participation rate of 20 to 24 year-olds in courses for a bachelor degree or above (these include those at all higher education providers). While the attainment rate has experienced steady growth over the past decade, the same cannot be said for levels of participation in bachelor degrees by the next group of people entering the 25 to 34 year age bracket. Between 2004 and 2009, attainment rates grew steadily in Australia, while the participation rates of persons aged 20 to 24 remained relatively steady. The final three years in this time series show some uniformity in direction, with participation rates finally rising in 2011 and 2012.



Source: ABS Survey of Education and Work 2001 to 2012.

Figure 14: Participation rates in bachelor degree or above (20 to 24 year-olds) and bachelor degree attainment rates (25 to 34 year-olds), 2001 to 2012.

While the late rise is a positive sign of the potential role of domestic students in boosting attainment rates, overall the majority of the years in this time series indicate that the growing attainment rates in Australia over the past decade have not necessarily been achieved through output from domestic higher education. So what is contributing to this noticeable and well-publicised growth in attainment?

The most plausible explanation is that the change in higher education attainment levels has been the result of a strong skilled migration program, focused on young migrants in professional occupations, alongside large increases in the number of international students studying in Australia. Between 2001 and 2009, skilled migration numbers increased 87 per cent, with more than 35,000 settler arrivals of 25 to 34 year old professionals in 2009 (Edwards, 2011b, p. 7). In parallel, international student completions in Australian universities more than doubled over the decade, with nearly 43,000 completions in 2009. Data compiled by the ABS suggest at least one-third of international students are successful in applying for a permanent residency visa and remaining in Australia on completion (ABS, 2007), although their ability to do so is contingent upon fluctuating visa regimes.

So, while Australia appears to be on track to achieve the attainment figures, the reality of the situation appears to be less certain and heavily reliant on continued growth in migration and international student numbers. Given the volatility of these sources of growth, illustrated recently through changes to the skilled migration program and nervousness surrounding the sustainability of the international student market, the role of domestic student expansion in Australia in achieving and sustaining the government's target of 40 per cent attainment over the long term is of paramount importance.

In this context of overall growth, it is appropriate to consider whether it is likely that Australia will meet the attainment target by 2025. As suggested through previous analyses (Birrell, Rapson, & Smith, 2010; Edwards, 2011a), achieving this target will require consistent increases in student enrolments over a number of years. So while current figures suggest that Australia is on track to achieve these targets, the likelihood of achieving the attainment target depends on its ability to continue to expand for a number of years to come.

A model developed by the Centre for Population and Urban Research (Birrell, et al., 2010) provides an opportunity to track the 'required' trajectory for expansion alongside the actual expansion in higher education that has been experienced over the past few years. In Figure 15 the 'required' trajectory of bachelor-level completions is shown in the dotted line, while the actual numbers and the numbers officially forecast in the national budget papers are plotted in the solid line. This figure shows that for the period of the estimates (2010 to 2015), domestic enrolment numbers appear to be on track to reach the attainment target. However, the numbers in the estimates flatten out by 2015. This is problematic because, according to the 'required growth' scenario, consistent increases of about 5 per cent growth maintained for a seven year period would be needed to reach the 40 per cent attainment goal. So, while initial growth may be on track, the challenge for the sector is sustaining these increases until the beginning of the next decade.

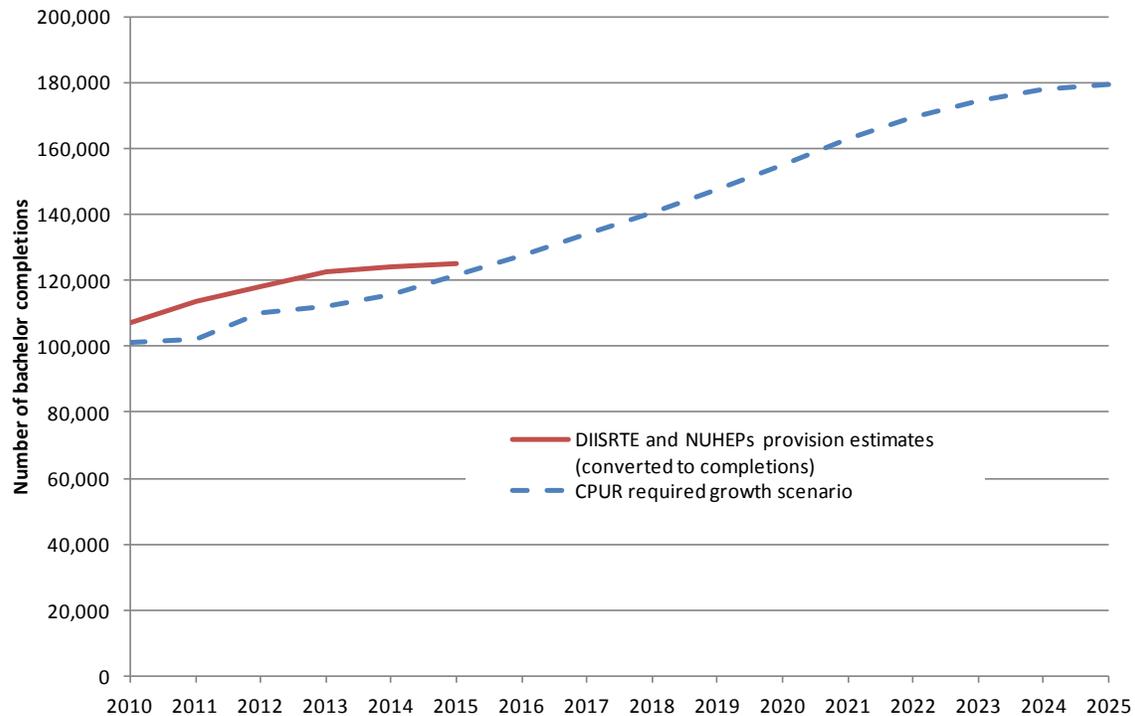


Figure 15: Forecasts of enrolments (public and private providers) and CPUR growth scenario comparison, 2010 to 2025

Changes in demand

In this context, it is important to evaluate the extent to which student demand is changing in the strong-growth environment of recent years. The most reliable measure for exploring change in demand is through the Commonwealth Government's university applications and offers annual publication. The data in Figure 16 highlight the growth in applicant numbers for university each year from 2007. As is apparent from this data, the increase in provision of university places was met initially with an increase in applicant numbers, with applicants in 2009 (for a place in 2010) and in 2010 (for 2011) relatively high. However, following this initial spike in demand, the rate of growth in applications for university has slowed in recent years, with the very latest data from 2013 (for 2014) showing demand has almost slowed to a halt. If this demand continues to slow, the likelihood of meeting the attainment target through expansion of domestic higher education enrolments is small.

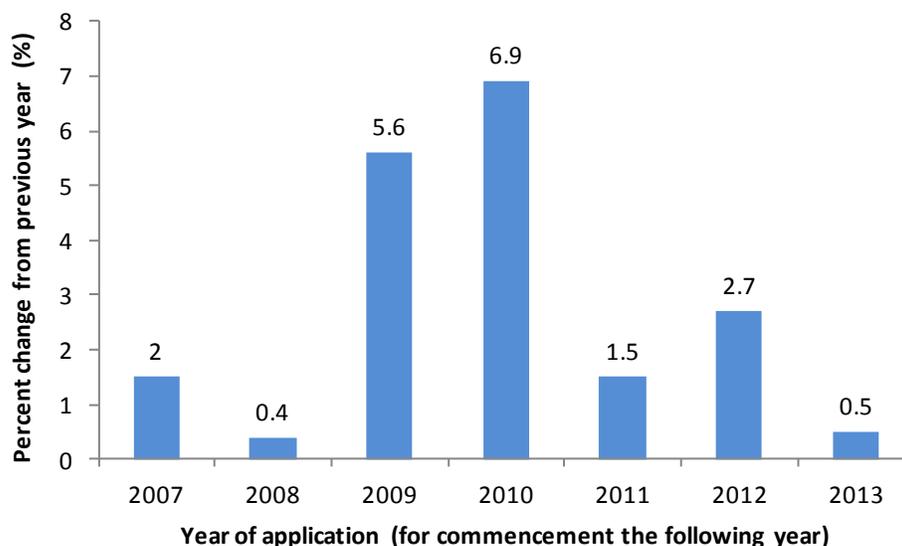


Figure 16: Tracking demand, annual change in university applications 2007 to 2013

Increasing attainment through expanded provision

In the situation described above, it is possible that an expansion of provision by Private providers (perhaps through the introduction of CSP places) may be a way of re-stimulating demand for higher education in order to keep growth on track to meet attainment targets.

The idea of expanding demand driven funding to non-university providers was suggested by the Bradley panel in their mapping out of a change in funding. Recommendation 29 of the Review stated that the demand-driven funding system should “apply initially only to public universities, but would be extended to other approved providers when new regulatory arrangements are in place” (Bradley, Noonan, Nugent, & Scales, 2008). With the establishment of the Tertiary Education Quality Standards Agency (TEQSA) through an Act of Parliament in 2011, the foundation for these regulatory arrangements is well in place.

In the context of a dwindling of demand for university, and if the Bradley recommendation is to be taken up, the timing is perhaps appropriate now to expand the demand-driven funding system into the Private and TAFE higher education providers.

An example of the potential additional growth that Private providers may be able to foster in an open demand system is highlighted by Edwards (2013) using the example of the VET system in Victoria. Data provided by the Victorian Government following the introduction of demand driven funding in VET showed a 75 per cent growth in enrolments, facilitated almost entirely by Private providers. While there are also lessons to be learnt from the application of such a system, the response of Private providers to the market is shown here to be significant, and in the context of higher education it is possible that these providers respond by increasing awareness, demand and enrolments in higher education.

Exploration as to particular course types, disciplines and or geographic areas in which the expansion of CSPs could be facilitated through Private providers would be necessary to ensure that the choices in the sector remained balanced and that opportunities for study for all those interested in higher education could be facilitated. The different distributions between provider type by field of education and level of course described earlier (see Figure 9 and Figure 7) help to show there are areas where the smaller providers do not overlap with universities and it is in these niche areas and in facilitating regional and remote participation that some of the thinking in this regard might be useful.

Meeting the Low SES target

The growth of higher education enrolments in the past few years has been greater among those from low SES areas than it has been for other students. The data used in this paper show that low SES commences grew by 29 per cent in the 2009 to 2012 period, twice the rate at which commencements from the highest SES quartile grew and at a faster rate than the national average of 21.3 per cent.

This increase is helpful in pushing towards achieving the low SES target of 20 per cent of undergraduate enrolments by 2020. However, despite the relatively large gains for this group, their overall representation in higher education commencers and among all enrolments has only marginally increased. The proportion of all commencers who are from low SES backgrounds increased from 16.9 per cent in 2009 to 18.0 per cent in 2012, a small gain of 1.1 percentage points. On the measure that is specifically linked to the SES targets – all enrolments, the gain over this period of massive growth was more marginal, from 16.1 per cent in 2009 to 16.9 per cent in 2012.

The reality for the low SES targets is that even in a period of unprecedented growth in the past 20 years, the overall representation of low SES students in higher education in Australia increased by less than one percentage point in four years. Gaining the remaining 3.1 percentage points (as suggested in this data) to make the 20 per cent target in the space of seven years seems to be unrealistic if the status quo is maintained.

A potential way in which the status quo could be changed to increase the chances of expanding low SES participation is through the extension of CSP places to Private providers and TAFEs. While these providers currently enrol a lower proportion of low SES students than do public universities, there is perhaps a possibility that the financial costs of upfront fees are responsible for this difference. Certainly the modes of provision supported by many Private providers are more conducive to benefitting under-represented groups due to relatively small class sizes and often a more pastoral approach to teaching and learning (Edwards, Coates, & Radloff, 2009).

Again, the Victorian VET example (while not completely translatable to higher education) suggests that the expansion of government funded education places in Private providers can be positive on participation of under-represented groups. The Victorian expansion, explained further elsewhere (Edwards, 2013) increased the participation of indigenous and the participation of students with a disability substantially in the VET sector.

Conclusion

This work is being compiled at an interesting time. Only a month or so after a change in Federal Government, the sector is yet to have clarity on many of these big picture issues. What role do these policies and targets have under a Coalition Government? Big question that could again result in yet more reshaping.

Overall, this work has shown that the massive growth in enrolments over the past few years has been primarily driven by universities – because it is universities which were the specific aim and beneficiaries of substantial change in policy and funding provision. What is remarkable is that at the same time as this massive growth funded by the Commonwealth Government, other providers such as Private HEPs and TAFEs have managed to continue to find a market in domestic undergraduate enrolments and have continued to grow their small but notable share of these students in Australia.

The data presented here has established a number of differences in the student characteristics of enrollees across the different types of HEPs, showing that the role in which each type of provider plays in the sector is relatively unique.

The concluding sections of the paper explored the role in which Private providers might play in increasing participation overall and participation specifically of low SES students. The implication from the finding here are that as universities begin to slow down their recent growth, Australia remains some way off achieving either of the targets set at the end of last decade. The role that Privates and TAFEs could play in maintaining growth and expanding access should not be underestimated. However, the application of any CSP-related places into these providers should probably commence in a targeted way, with a focus on expansion of under-represented groups of students.

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Appendix A: Further information about providers of Higher Education in Australia

According to the TEQSA National Register of Higher Education (TEQSA, 2014), Australia's higher education sector currently includes 172 higher education providers and 1,050 listed accredited courses. The information noted below details the provider types and distribution of all registered higher education providers. Please note that in the data presented in the main part of this paper, the actual number of providers represented by enrolment data is slightly smaller due to the fact that only those with undergraduate enrolments in 2012 that were recorded in the Commonwealth Department of Education Data were included.

Of the 172 higher education providers in 2013, there are 43 universities:

- 40 are **Australian universities**, of which:
 - 37 are Table A self-accrediting public universities; and
 - 3 are self-accrediting private universities (Bond University, the University of Notre Dame, Australia and Torrens University Australia).
- two are **overseas universities** (Carnegie Mellon University Australia and University College London, Australia) and are not self-accrediting;
- one is a **specialised university** (MCD University of Divinity) that is self-accrediting.

There are 129 other higher education providers. These providers comprise both Private providers and TAFEs and are all non-self-accrediting. Of these other higher education providers:

- eight are TAFEs;
- 23 are religious and/or theology based higher education providers; and
- 73 are dual sector providers offering both higher education and VET courses.

Most, 121, of the other higher education providers are Private higher education providers. Some providers are hard to classify on a public-private spectrum, as they are considered private, for-profit institutions but are owned by public universities, for example Monash College, Swinburne College and InSearch: UTS.

43 per cent of Private higher education providers offer courses at postgraduate level and eight per cent offer Higher Degrees by Research. 37 per cent of Private higher education providers are approved to deliver courses to overseas students and 36 per cent offer FEE-HELP support to their students.