

SDR 155/2012

20 September 2012

## Education Maintenance Allowances Awarded in Wales, 2011/12

This Statistical First Release presents a final update on the number of Education Maintenance Allowances (EMAs) awarded to students in further education in academic year 2011/12, as at the end of August 2012. The release is based on data provided by the Student Loans Company (SLC) and is correct as at 3 September 2012. This is the final in a series of monthly updates on 2011/12, and provides some additional breakdowns by age, and level of allowance.

The EMA Wales scheme was introduced for 16 year olds in 2004/05 and extended to include 17 year olds in 2005/06 and finally to include 18 year olds in 2006/07. EMA is a weekly allowance, linked to satisfactory attendance, paid fortnightly to eligible students attending learning centres in Wales.

From academic year 2011/12, the criteria for new EMA a student receiving the £30 award has changed, and the £10 and the £20 awards are no longer available. A new table has been added to the release to indicate the breakdown of the £30 award (*Table 6*). Students new to EMA may qualify for an award of £30 per week, depending on household income and family circumstances. Students who received EMA in 2010/11 who are returning to education and meet the same eligibility criteria as for 2010/11 will continue to get their EMA, be it for £10, £20 or £30 per week. No further bonus payments (previously paid in September, January and July) have been made to any students.

### Key results

Overall, approved applications for EMA were down 11 per cent on last year, whilst the total number of applications received was down by 12 per cent (*Charts 1 and 2*). A comparison of August 2011/12 and August 2010/11 data implies that although the number of approved applications for the £30 award has decreased; the decrease in the number of total approved applications is largely a result of the removal of the £10 and £20 awards for students new to EMA (*Chart 2, Table 6*).

- A total of 33,880 applications were received for 2011/12, a decrease of 12 per cent compared with 2010/11 (*Chart 1, Table 1*).
- 32,520 (96 per cent) of applications received were approved, 935 (3 per cent) were rejected and 410 (1 per cent) were incomplete (*Chart 3, Table 1*).
- 13,075 (40 per cent) of approved applications were from 16 year olds, 13,435 (41 per cent) were from 17 year olds and 6,010 (18 per cent) were from 18 year olds and over (*Chart 5, Table 3*).
- 14,625 (45 per cent) approved applications were from first year claimants and were therefore entitled to £30 per week due to the change in the EMA eligibility criteria (*Table 5*).
- £30 awards accounted for 92 per cent of all approved applications of which 51 per cent were from new claimants, with £20 awards accounting for 5 per cent and £10 awards accounting for 3 per cent (*Table 2*) (*Table 6*).

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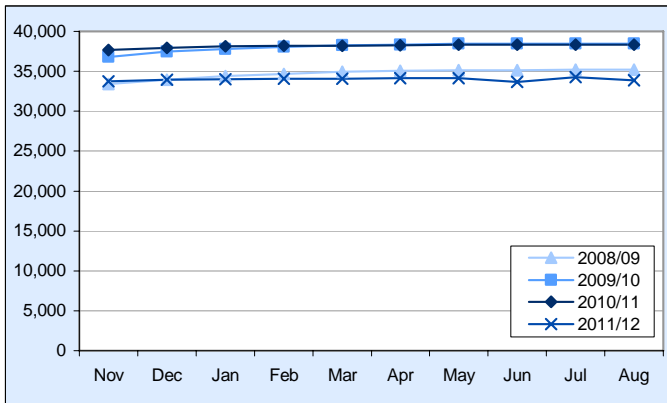


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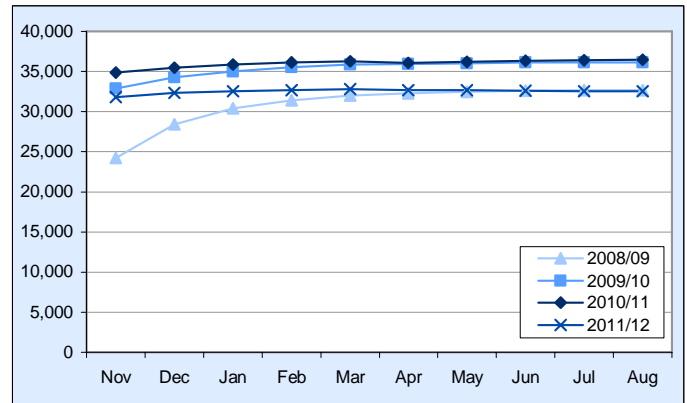
## Context

Trends in applications and approvals for EMA provided in this release should be considered against the context of trends in the eligible cohort (of mainly 16 to 18 year olds), their participation in education and training, and their household income levels (since EMA is means-tested). In general, demographic trends have shown a decline in this age cohort since mid-2008, currently projected to continue until around 2020. Data on the number of learners show a slight decrease for this age group in 2008/09, 2009/10 and 2010/11. The effect of the recent recession on employment levels and household income may have influenced numbers eligible for means-tested allowances.

**Chart 1: Cumulative number of all applications received by month and year of study**

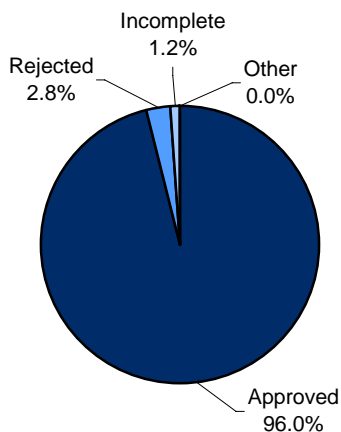


**Chart 2: Cumulative number of approved applications by month and year of study**



Overall, approved applications for EMA were down 11 per cent on last year (*Chart 2*) whilst the total number of applications received was down by 12 per cent (*Chart 1*). A comparison of August 2011/12 and August 2010/11 final data implies that although the number of approved applications for the £30 award has decreased; the decrease in the number of total approved applications is largely a result of the removal of the £10 and £20 awards for students new to EMA.

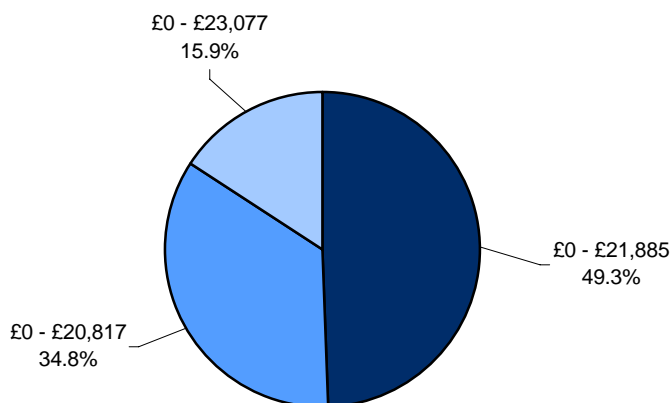
**Chart 3: Total applications received by current work stage for 2011/12, as at 31 August 2012 (a)**



As at 31 August 2012, 96 per cent of applications received had been approved and 3 per cent had been rejected (*Table 1*). The majority of the remaining applications received were incomplete. These include applications that are either “missing information” (e.g. no date of birth included) or “missing evidence” (e.g. no birth certificate attached).

(a) Current work stage denotes the status of the application at 3 September 2012 when data were extracted from the Student Loans Company (SLC) database.

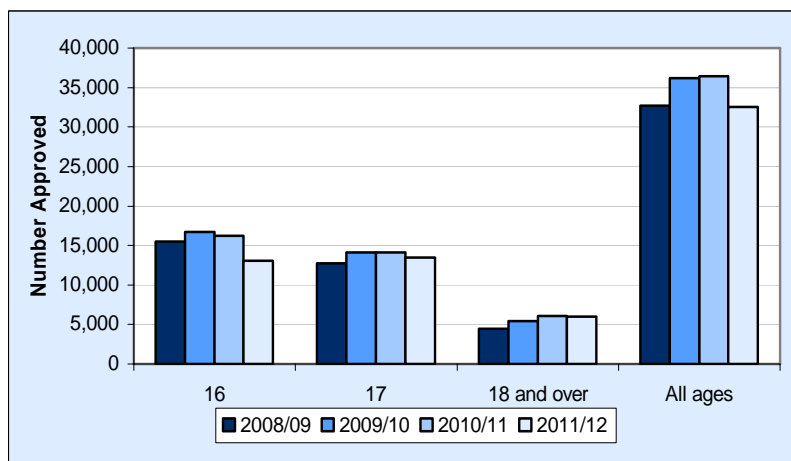
**Chart 4: Approved applications by EMA £30 award and household threshold levels, as at 31 August 2012 (a)**



(a) Current work stage denotes the status of the application at 3 September 2012 when data were extracted from the Student Loans Company (SLC) database.

Of those entitled to a £30 award, 49 per cent of approved applications were from returning students with a household threshold income of £21,885 or less; 35 per cent were from new claimants with a household income of £20,817 or less (independent students or only child in household), and 16 per cent were from new claimants with a household income of £23,077 or less (with siblings aged 16 or under in the household or one or more siblings aged 20 or under in full-time education or training and eligible for child benefit in the household). There were 20 claimants whose household income was 'unknown'.

**Chart 5: Approved applications by age (b)(c)**

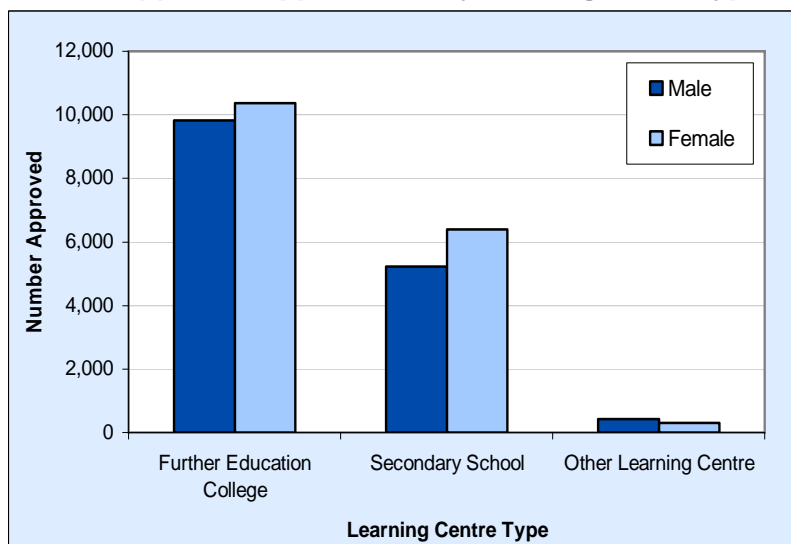


(b) 2008/09 figures as at 31 August 2009, 2009/10 figures as at 31 August 2010, 2010/11 figures as at 31 August 2011, and 2011/12 figures as at 31 August 2012.

(c) Data include 19 year olds who are eligible due to exceptional circumstances.

40 per cent of approved applications in 2011/12 were from 16 year olds, compared with 44 per cent in 2010/11. The percentage of applications from 17 year olds has slightly increased from 39 per cent in 2010/11 to 41 per cent in 2011/12; whereas the percentage of applications from 18 year olds and over has remained constant compared to that in 2010/11.

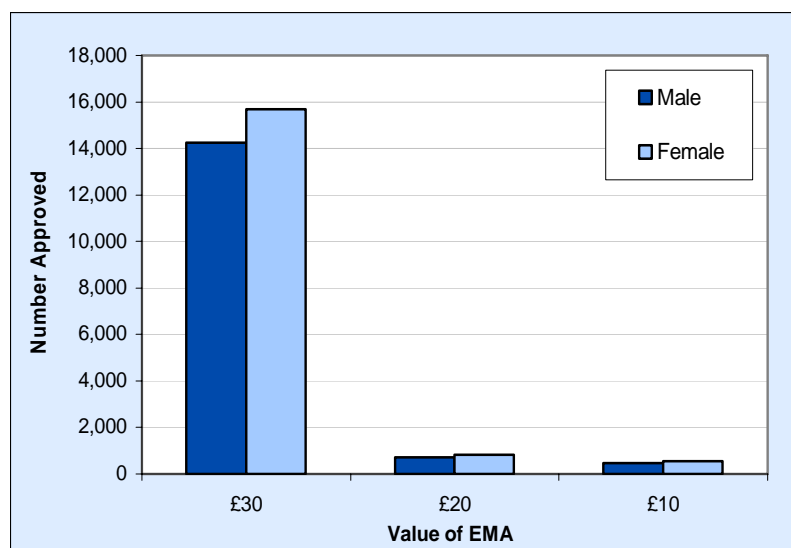
**Chart 6: Approved applications by learning centre type and gender, 2011/12**



A higher proportion of approved applications were from females than males in both further education colleges and secondary schools (51 per cent and 55 per cent respectively). 41 per cent of approved applications were from females in other learning centres<sup>1</sup>. However, only 715 approved applications were from students attending other learning centres.

<sup>1</sup> 'Other learning centres' comprises of Special schools and Independent schools.

**Chart 7: Approved applications, by level of award and gender, 2011/12**



As at 31 August 2012, £30 awards accounted for 92 per cent of all approved applications, with £20 awards accounting for 5 per cent and £10 awards accounting for 3 per cent (Table 2).

93 per cent of successful applications from both males and females at further education colleges were entitled to the maximum award of £30; for secondary schools the proportions were 91 per cent for males and 90 per cent for females.

**Table 1: Applications by current work stage and gender, 2011/12 (d)**

Application current work stage	Male	Female	Total
Approved	15,455	17,065	32,520
<i>of which received at least one payment</i>	15,215	16,830	32,045
Rejected	465	470	935
Incomplete (e)	185	225	410
Other (f)	5	10	15
<b>Total</b>	<b>16,110</b>	<b>17,770</b>	<b>33,880</b>
<i>of which are renewals (g)</i>	8,650	9,860	18,510

Source: Student Loans Company

(d) As at 31 August 2012.

(e) These include applications that have "missing information" (e.g. no date of birth included) or "missing evidence" (e.g. no birth certificate attached).

(f) These include applications that are in one of the following workstages: assessed; awaiting rejection; data capture incomplete; failed assessment; validated; verified (as defined by SLC).

(g) Applicants who also applied for an allowance in previous academic year.

Of the total applications received, 48 per cent were from males and 52 per cent were from females. The same proportions apply to approved applications. These proportions are similar to those for 2010/11. Of the approved applications which received at least one payment, 47 per cent were from males and 53 per cent were from females.

**Table 2: Approved applications by learning centre type, gender and value of award, 2011/12 (d)**

	£30	£20	£10	Total
<b>Further Education College:</b>	<b>18,730</b>	<b>900</b>	<b>560</b>	<b>20,185</b>
Males	9,105	445	260	9,815
Females	9,620	450	300	10,370
<b>Secondary School:</b>	<b>10,535</b>	<b>615</b>	<b>465</b>	<b>11,620</b>
Males	4,750	260	210	5,220
Females	5,785	355	255	6,400
<b>Other Learning Centre:</b>	<b>675</b>	<b>25</b>	<b>15</b>	<b>715</b>
Males	400	10	10	420
Females	275	10	5	295
<b>All Learning Centres:</b>	<b>29,940</b>	<b>1,540</b>	<b>1,040</b>	<b>32,520</b>
Males	14,255	720	480	15,455
Females	15,685	820	560	17,065

Source: Student Loans Company

(d) As at 31 August 2012.

£30 awards accounted for 92 per cent of all approved applications, with £20 awards accounting for 5 per cent and £10 awards accounting for 3 per cent.

**Table 3: Approved applications by age, learning centre type, gender and academic year (h)**

	2010/11 (i)				2011/12 (j)			
	16	17	18+	Total	16	17	18+	Total
<b>Further Education College:</b>	<b>8,385</b>	<b>7,100</b>	<b>4,540</b>	<b>20,025</b>	<b>7,210</b>	<b>7,875</b>	<b>5,100</b>	<b>20,185</b>
Males	4,115	3,490	2,230	9,840	3,570	3,765	2,480	9,815
Females	4,265	3,605	2,310	10,185	3,645	4,110	2,620	10,370
<b>Secondary School:</b>	<b>7,525</b>	<b>6,770</b>	<b>1,375</b>	<b>15,665</b>	<b>5,635</b>	<b>5,290</b>	<b>690</b>	<b>11,620</b>
Males	3,415	3,075	625	7,115	2,550	2,330	340	5,220
Females	4,110	3,690	750	8,550	3,085	2,960	355	6,400
<b>Other Learning Centre:</b>	<b>305</b>	<b>285</b>	<b>180</b>	<b>770</b>	<b>230</b>	<b>270</b>	<b>215</b>	<b>715</b>
Males	180	170	110	460	140	150	130	420
Females	125	110	70	310	90	120	90	295
<b>All Learning Centres:</b>	<b>16,210</b>	<b>14,150</b>	<b>6,100</b>	<b>36,460</b>	<b>13,075</b>	<b>13,435</b>	<b>6,010</b>	<b>32,520</b>
Males	7,705	6,740	2,965	17,415	6,260	6,250	2,950	15,455
Females	8,505	7,410	3,130	19,045	6,820	7,185	3,060	17,065

Source: Student Loans Company

(h) Age at start of academic year.

(i) As at 31 August 2011. Includes 19 year olds (see notes for explanation).

(j) As at 31 August 2012. Includes 19 year olds (see notes for explanation).

20,185 students attending further education colleges had their applications approved. These accounted for 62 per cent of all approved applications. 11,620 students attending secondary schools had their applications approved, accounting for 36 per cent of all approved applications. The remaining 2 per cent of approved applications were for students attending other learning centres.

**Table 4: Approved applications by gender and academic year (k) (c)**

	2007/08	2008/09	2009/10	2010/11	2011/12
<b>All Learning Centres:</b>	<b>31,180</b>	<b>32,695</b>	<b>36,185</b>	<b>36,460</b>	<b>32,520</b>
Males	14,395	15,325	17,180	17,415	15,455
Females	16,785	17,370	19,010	19,045	17,065

Source: Student Loans Company

(k) 2007/08 figures as at 1 September 2008, 2008/09 figures as at 31 August 2009, 2009/10 figures as at 31 August 2010, 2010/11 figures as at 31 August 2011, and 2011/12 figures as at 31 August 2012.

(c) Data include 19 year olds who are eligible due to exceptional circumstances.

**Table 5: Approved applications by year claiming EMA (k)**

	2007/08	2008/09	2009/10	2010/11	2011/12
<b>Year claiming EMA:</b>	<b>31,180</b>	<b>32,695</b>	<b>36,185</b>	<b>36,460</b>	<b>32,520</b>
First	17,045	17,740	19,535	18,415	14,625
Second	11,560	11,970	13,055	13,735	13,305
Third	2,515	2,980	3,590	4,300	4,590
Fourth	60	5	5	10	*

Source: Student Loans Company

(k) 2007/08 figures as at 1 September 2008, 2008/09 figures as at 31 August 2009, 2009/10 figures as at 31 August 2010, 2010/11 figures as at 31 August 2011, and 2011/12 figures as at 31 August 2012.

In 2011/12, 14,625 applications (45 per cent) of approved applications were from first year claimants and were therefore entitled to £30 per week due to the EMA criteria change.

**Table 6: Approved applications by EMA £30 award (k)(l)**

	2009/10	2010/11	2011/12
<b>Household threshold level</b>			
£0 to £21,885	30,215	30,585	14,765
£0 to £20,817	.	.	10,405
£0 to £23,077	.	.	4,750
Unknown	0	0	20
<b>Total</b>	<b>30,215</b>	<b>30,585</b>	<b>29,940</b>

Source: Student Loans Company

(k) 2009/10 figures as at 31 August 2010, 2010/11 figures as at 31 August 2011, and 2011/12 figures as at 31 August 2012.

(l) "." denotes not applicable.

Of those entitled to a £30 award, 15,155 approved applications (51 per cent) were from new claimants, with 10,405 applications coming from students with a household income of £20,817 or less (independent students or only child in household), and 4,750 applications coming from students who had a household income of £23,077 or less (with siblings aged 16 or under in the household or one or more siblings aged 20 or under in full-time education or training and eligible for child benefit in the household). 14,765 returning EMA students in 2011/12 were awarded an award of £30 per week, and thus had a household income of £21,885 or less.

## Annex 1: Notes

### 1. Context

#### 1.1 Policy/operational context

Education Maintenance Allowance (EMA) is a scheme providing young people who wish to continue in education after school leaving age with an incentive to earn awards through good attendance and achieving agreed objectives. Changes to this scheme were introduced from September 2011, with further details provided here: <http://wales.gov.uk/docs/dcells/publications/101109emaen.pdf>

#### 1.2 Eligibility criteria, 2011/12

A student has a general entitlement to receive an EMA if:

##### *Student criteria*

- He/she is aged 16, 17 or 18 years old<sup>2</sup> on 31 August 2011.
- He/she has a bank or building society current account.
- He/she meets the nationality/residency criteria.

##### *Course criteria*

- He/she is studying full-time at a school; or studying at least 12 guided hours a week at a recognised further education institution.
- He/she is studying an academic or vocational course up to and including level 3. Eligible academic or vocational course include GCSEs, A-Levels, BTECs, NVQs, GNVQs and Basic Skills courses.
- He/she is studying an eligible course that lasts at least 10 weeks.

##### *Household income criteria*

Evidence of household income in the prior tax year determines whether a student will be eligible for an EMA.

Students new to EMA in 2011/12 may qualify for an award of £30 per week. There are two different household income thresholds, which are based on the student's family circumstances. Students will not be able to receive EMA if their household income is above the threshold levels.

##### For students new to EMA in 2011/12

Family circumstances	Household income threshold
You are the only dependant child in the household	£0 - £20,817
You have one or more dependants aged 16 or under in the household	£0 - £23,077
You have one or more dependants aged 20 or under in full-time education or training and eligible for child benefit in the household	£0 - £23,077

Returning EMA students, who continue to meet the eligibility criteria for 2010/11 EMA scheme, will continue to get their EMA, be it for £10, £20 or £30 per week.

##### Returning EMA students in 2011/12

Household Income (per annum)	Entitlement Amount (per week)
£0 - £21,885	£30
£21,886 - £26,840	£20
£26,841 - £32,400	£10
£32,401 or above	Nil

### 2. Data source

EMA applications and payments are administered by the Student Loans Company (SLC). Data held on EMA students is entered by SLC staff onto an administrative database for the purpose of assessing and paying EMA to students. This data is also stored in a management information data warehouse for the purpose of management reporting, operational performance reporting, audit of processes, statistics, future policy planning and forecasting. Further details of SLC's administrative sources will be published on [SLC's web page](#) later this year. Processes and systems which enable customer and application assessment data to be held electronically are subject to periodic audit and integrity checks. SLC Internal Audit ensure that the processes governing data entry and application assessment are adhered to. Data integrity validation rules are used to identify and correct errors in data. Management Information extracted from SLC systems are subject to quality assurances prior to distribution.

<sup>2</sup> Entitlement may be extended to 19 year olds if they have not already received 3 years of EMA.

The data in this release were collected via the SLC management information system and were extracted on 3 September 2012. All information is based on applications received by 31 August 2012.

### **3. Definitions**

#### **3.1 Change in applicant circumstances**

The data represented in this release refer to applicants' most recent learning agreement. Therefore if an applicant has attended more than one type of learning centre or has received different values of weekly payments, to avoid double-counting, they are only included under their most recent status.

#### **4. Rounding strategy**

Figures in this release have been rounded to the nearest 5. Due to rounding, the sums of some rows or columns may not add to the total figure given. Numbers less than 5, but not zero, are represented by '\*'. '.' denotes not applicable.

#### **5. Equal Opportunities**

16,185 Equal Opportunities monitoring forms were received in 2011/12, which equates to 48 per cent of all applications received. It is not known whether these applications have been approved, rejected or are currently being processed since the data are disassociated from the application process, and not all forms were fully completed.

The data as at 31 August 2012 show that of the applications for which an equal opportunities form was completed:

- 5 per cent classed themselves as disabled;
- 96 per cent classed their ethnicity as white;
- 4 per cent made up each of the groups who were of mixed race, Asian or British Asian and 'Chinese or other ethnic origin';
- Around half a per cent said they were 'Black or British Black'.

#### **6. Key Quality Information**

This section provides a summary of information on this output against five dimensions of quality: Relevance, Accuracy, Timeliness and Punctuality, Accessibility and Clarity, and Comparability.

##### **6.1 Relevance**

The statistics are used both within and outside the Welsh Government to monitor educational trends and as a baseline for further analysis of the underlying data. Some of the key users are:

- Ministers and the Members Research Service in the National Assembly for Wales;
- Officials in the Welsh Government;
- Other government departments;
- Further Education Institutions, Work-Based Learning providers, schools and local authorities;
- Wales Audit Office;
- Students, researchers, academics and universities;
- Individual citizens, private companies, and the media.

These statistics are used in a variety of ways. Some examples of these are:

- advice to Ministers;
- to inform and evaluate the education policy-making process in Wales;
- to forecast future expenditure of student support schemes in Wales.

##### **6.2 Accuracy**

Statisticians within the Welsh Government review the data and query any anomalies with the Student Loans Company before tables are published. The figures in this release reflect the final position as at the end of the 2011/12 academic year (31 August 2012), and are correct as at 3 September 2012.

Looking at previous years' data, it is possible to estimate how close provisional data is to final data. Below is a table showing the percentage increase/decrease seen between each month's update of approved applications, compared with the final figure as at end of August, published in September:



**Percentage change in the number of approved applications between provisional data (as at end of stated month) and final data (as at end of August)**

	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
2008/09	34.8%	15.1%	7.5%	4.1%	2.1%	1.3%	0.7%	0.3%	0.1%	0.0%
2009/10	9.6%	5.3%	3.2%	1.8%	0.9%	0.7%	0.4%	0.2%	0.1%	0.0%
2010/11	4.3%	2.6%	1.5%	0.8%	0.4%	1.0%	0.7%	0.3%	0.1%	0.0%
2011/12	2.1%	0.4%	-0.2%	-0.6%	-0.8%	-0.5%	-0.6%	-0.4%	0.0%	0.0%

### 6.3 Timeliness and Punctuality

For 2011/12 the first monthly publication on the number of EMA applications was released in December 2011, relating to applications up until the end of November 2011. Monthly updates during a given academic year are published as soon as possible, a few weeks following the end of a given month, and according to a planned and pre-announced series of publication dates. Data in this release refers to final 2011/12 data.

### 6.4 Accessibility and Clarity

This statistical release is pre-announced and then published on the Statistics section of the Welsh Government website. It is accompanied by more detailed tables on StatsWales, a free to use service that allows visitors to view, manipulate, create and download data.

### 6.5 Comparability

For the academic year 2004/05 only students aged 16 at the start of the academic year were eligible to receive an EMA. The scheme was extended to 17 year olds for the 2005/06 academic year and finally 18 year olds in 2006/07. Therefore comparability between years varies, and before 2006/07 should be restricted to comparisons. Figures from 2006/07 onwards are comparable with each other.

Data for 2011/12 includes approximately 310 students who are 19 years old and are eligible for EMA due to exceptional circumstances and providing they have not received EMAs for more than two years (see eligibility criteria).

Data for 2011/12 will only be comparable with previous years' data from November onwards. This is due to a change in the Student Loans Company's procedure for renewing applications for existing students, which first came into affect in academic year 2010/11.

The reported number of academic year 2011/12 approved EMA applications dropped significantly between March and April 2011. This is due to the annual exercise carried out by SLC to sample check a proportion of those returning EMA applicants who have chosen to self certify their income and assess the application against the applicants' previous years income evidence. If the applicant later fails to provide evidence of household income (if requested) then they will be assumed to no longer be eligible for support.

From academic year 2011/12, students new to EMA can only qualify for an award of £30 per week, depending on household income. Students who received EMA in 2010/11 who are returning to education and meet the same eligibility criteria as for 2010/11 will continue to get their EMA, be it for £10, £20 or £30 per week. No further bonus payments (previously paid in September, January and July) were paid out to students.

Northern Ireland and Scotland have their own EMA schemes. The EMA scheme in England has been cancelled and has been closed to new applicants since 1 January 2011. This scheme has been replaced by a £180m bursary scheme which focuses on students from less wealthy households. Further information on this can be found via the following link:

<http://www.direct.gov.uk/en/EducationAndLearning/14To19/MoneyToLearn/16to19bursary/index.htm>

## 7. Further Information

Further detailed information on EMA applications (similar to Table 2 of this Release) can be found in [StatsWales table 002480](#).

Comparable monthly data for previous academic years (similar to Table 1 of this Release) can be found in [StatsWales table 013283](#).

Please note that monthly 2009/10 data were confirmed as final (as at 31 August 2010) in [StatsWales table 013283](#), and therefore differ slightly to what is seen in Table 1 of this Release, as these figures were those correct as at 31 July 2010.

2012/13 monthly data on EMA will be first released on 12 December 2012 and will include data up to the end of November 2012. Subsequent monthly updates will follow, and will be found on the [Statistics for Wales](#) website.

Further information about the EMA scheme can be found at [www.StudentFinanceWales.co.uk](http://www.StudentFinanceWales.co.uk).

### **Related articles**

The Scottish Government publish statistics on recipients of EMA, for example in the following link: <http://www.scotland.gov.uk/Publications/2010/12/14095349/0>

Statistical Releases on other strands of student support in Wales are available via the following link: <http://wales.gov.uk/topics/statistics/theme/post16ed/student-finance/?lang=en>