

SDR 170/2011

22 September 2011

## Education Maintenance Allowances Awarded in Wales, 2010/11

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 2010/11, as at the end of August 2011. The release is based on data provided by the Student Loans Company (SLC) and is correct as at 5 September 2011. This is the final in a series of monthly updates on 2010/11, and provides some additional breakdowns by age, level of allowance, and information on bonuses.

The EMA Wales scheme was introduced for 16 year olds in further education in 2004/05 and extended to include 17 year olds in 2005/06 and finally to include 18 year olds in 2006/07. The principal component of the EMA is a weekly allowance, linked to satisfactory attendance, paid fortnightly to eligible students attending learning centres in Wales. Students can qualify for awards of £10, £20 or £30 depending on household income and can also qualify for periodic additional bonuses of £100 if agreed learning objectives are met.

### Key results

Overall, applications for EMA were at similar levels to last year. As at 31 August 2011, approved applications were up 0.7 per cent on last year, whilst the total number of applications received was down by 0.4 per cent (*Charts 5 and 6*).

- A total of 38,365 applications were received for 2010/11, a decrease of 0.4 per cent compared with 2009/10 (*Chart 5, Table 1*).
- 36,460 (95 per cent) of applications received were approved, 915 (2 per cent) were rejected and 620 (2 per cent) were incomplete (*Chart 2, Table 1*).
- 16,210 (44 per cent) of approved applications were for 16 year olds, 14,150 (39 per cent) were for 17 year olds and 6,100 (17 per cent) were for 18 year olds and over (*Chart 1, Table 3*).
- 18,415 approved applications were from first year claimants, a decrease of 6 per cent on the 19,535 approved applications from first year claimants in 2009/10 (*Table 5*).
- 30,585 (84 per cent) of approved applications were from students with a household income of £21,885 or less and thus were entitled to the maximum EMA of £30 per week (*Table 2*).
- Females accounted for 52 per cent of all applications and approved applications received (*Table 1*).
- Retention bonuses were paid in September 2010 to 17,440 students continuing their studies from 2009/10, an increase of 20 per cent compared with the previous year (*Table 6*).

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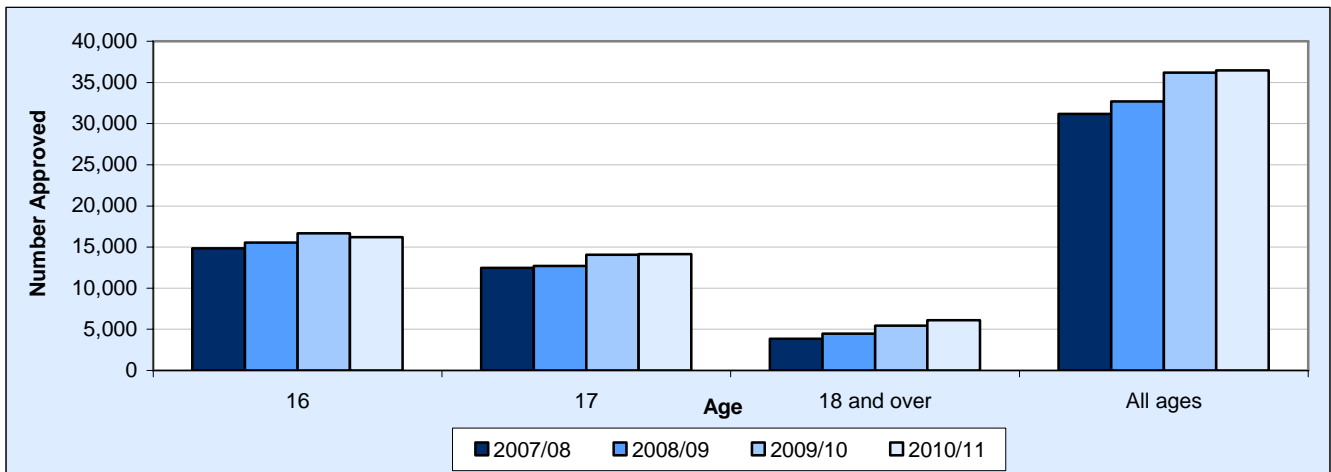


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## Context

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 the 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. In contrast data on enrolments in post-compulsory education show increases in participation for this age group in both 2008 and 2009. The effect of the recent recession on employment levels and household income may have influenced numbers eligible for means-tested allowances.

**Chart 1: Approved applications, by age (a) (b)**

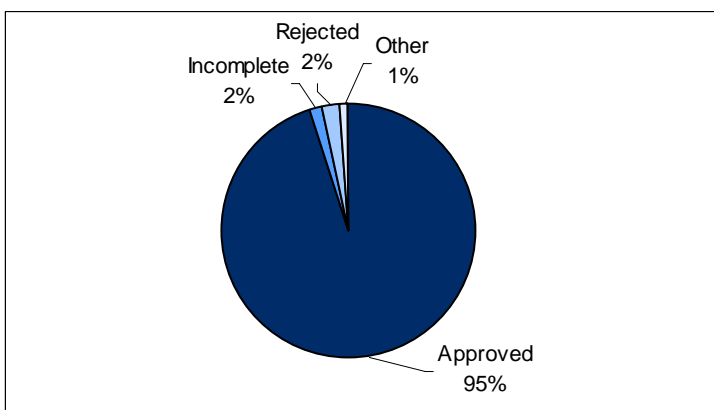


(a) 2006/07 figures as at 31 August 2007, 2007/08 as at 1 September 2008, 2008/09 as at 31 August 2009, 2009/10 as at 31 August 2010, and 2010/11 as at 31 August 2011.

(b) 2007/08, 2008/09, 2009/10 and 2010/11 data include 19 year olds who are eligible due to exceptional circumstances.

44 per cent of approved applications in 2010/11 were for 16 year olds, compared with 46 per cent in 2009/10. The percentage of applications for 17 year olds has remained constant; whereas the percentage of applications for 18 year olds has increased from 15 per cent in 2009/10 to 17 per cent in 2010/11.

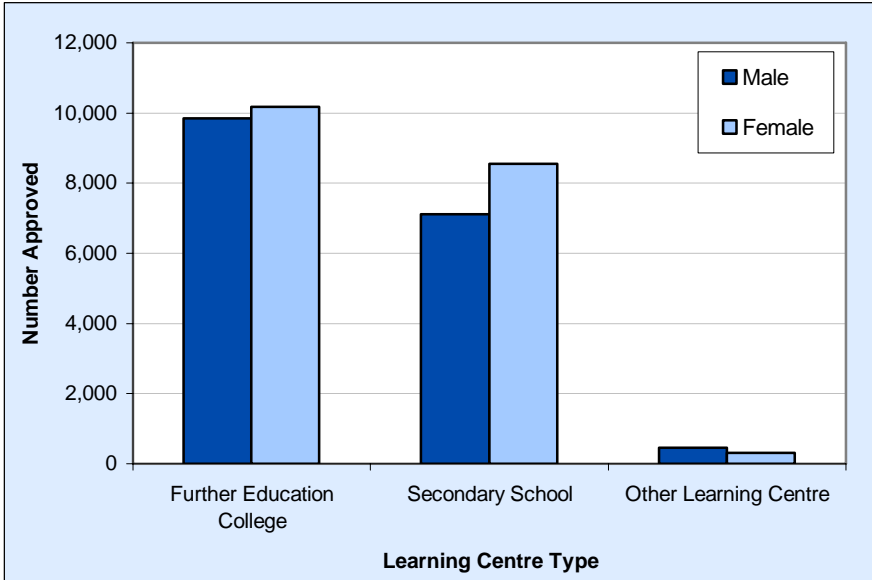
**Chart 2: Total applications received, by current work stage, 2010/11 (a)**



95 per cent of applications received had been approved and 2 per cent had been rejected. 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).

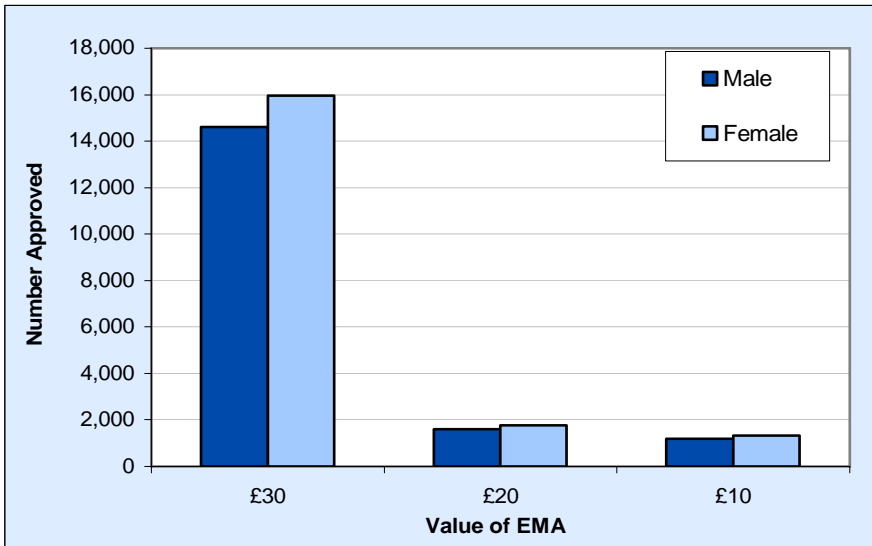
(a) Current work stage denotes the status of the application at 5 September 2011 when data were extracted from the Student Loans Company (SLC) database.

**Chart 3: Approved applications, by learning centre type and gender, 2010/11**



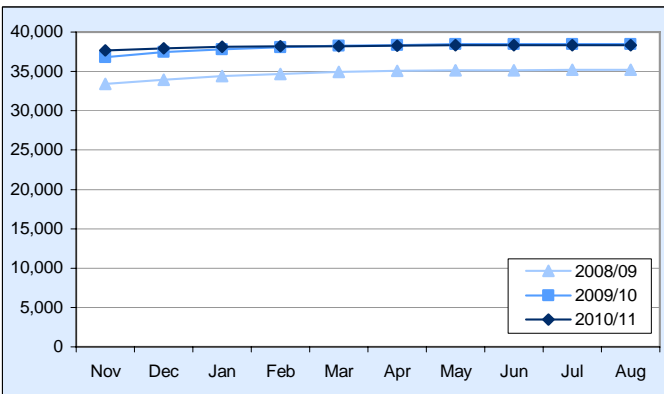
Females accounted for a higher proportion than males in both further education colleges and secondary schools. In other learning centres<sup>1</sup> only 40 per cent of approved applications were from females. However, only 770 approved applications were from students attending other learning centres.

**Chart 4: Approved applications, by level of allowance and gender, 2010/11**

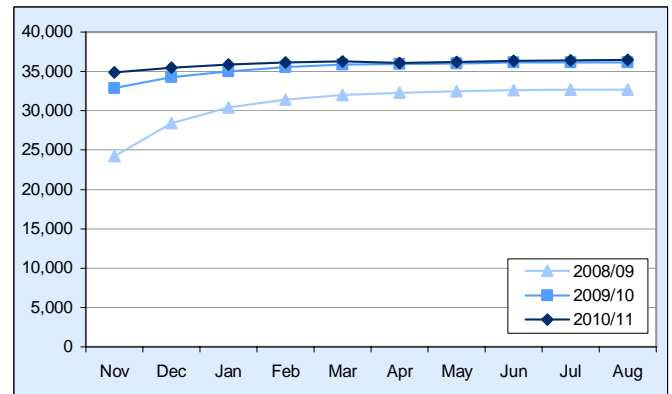


84 per cent of approved applications were from students with a household income of £21,885 or less and were thus entitled to the maximum EMA of £30 per week. This overall proportion was the same for both males and females. 86 per cent of successful applications from males and from females at further education colleges were entitled to a maximum EMA; for secondary schools the figure was 81 per cent for both males and females.

**Chart 5: Cumulative number of all applications received, by month and year of study**



**Chart 6: Cumulative number of approved applications, by month and year of study**



Overall, the number of applications received and the number of applications approved in 2010/11 were at similar levels to the previous year.

<sup>1</sup> Special schools and Independent schools comprise the category 'Other learning centres'.

**Table 1: Applications, by current work stage and gender, 2010/11 (a)**

<u>Application current work stage</u>	<u>Male</u>	<u>Female</u>	<u>Total</u>
Approved	17,415	19,045	36,460
<i>of which received at least one payment</i>	<i>17,060</i>	<i>18,690</i>	<i>35,745</i>
Rejected	430	485	915
Incomplete (b)	290	330	620
Other (c)	190	185	375
<b>Total</b>	<b>18,325</b>	<b>20,040</b>	<b>38,365</b>
<i>of which are renewals (d)</i>	<i>8,830</i>	<i>9,960</i>	<i>18,790</i>

Source: Student Loans Company

(a) As at 31 August 2011.

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

(c) These include applications that are in one of the following workstages: assessed; awaiting rejection; data capture incomplete; failed

Of the total applications received, 48 per cent were from males and 52 per cent were from females. The same proportions apply to the split in approved applications and approved applications which received at least one payment. These proportions are similar to those for 2009/10 (47 per cent from males and 53 per cent from females).

**Table 2: Approved applications, by learning centre type, gender and value of EMA award, 2010/11 (a)**

	<u>£30</u>	<u>£20</u>	<u>£10</u>	<u>Total</u>
<b>Further Education College:</b>	<b>17,180</b>	<b>1,640</b>	<b>1,200</b>	<b>20,025</b>
Males	8,435	825	580	9,840
Females	8,745	815	625	10,185
<b>Secondary School:</b>	<b>12,720</b>	<b>1,675</b>	<b>1,275</b>	<b>15,665</b>
Males	5,770	755	590	7,115
Females	6,950	920	680	8,550
<b>Other Learning Centre:</b>	<b>690</b>	<b>50</b>	<b>30</b>	<b>770</b>
Males	415	30	15	460
Females	275	20	15	310
<b>All Learning Centres:</b>	<b>30,585</b>	<b>3,365</b>	<b>2,505</b>	<b>36,460</b>
Males	14,620	1,610	1,185	17,415
Females	15,965	1,755	1,320	19,045

Source: Student Loans Company

(a) As at 31 August 2011.

£30 awards accounted for 84 per cent of all approved applications, with £20 awards accounting for 9 per cent and £10 awards accounting for 7 per cent. This is a similar pattern to that seen in 2009/10.

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

	2009/10 (b)				2010/11 (c)			
	16	17	18+	Total	16	17	18+	Total
<b>Further Education College:</b>	<b>8,490</b>	<b>8,120</b>	<b>4,680</b>	<b>21,290</b>	<b>8,385</b>	<b>7,100</b>	<b>4,540</b>	<b>20,025</b>
Males	4,155	3,920	2,205	10,275	4,115	3,490	2,230	9,840
Females	4,340	4,200	2,475	11,015	4,265	3,605	2,310	10,185
<b>Secondary School:</b>	<b>7,900</b>	<b>5,715</b>	<b>565</b>	<b>14,180</b>	<b>7,525</b>	<b>6,770</b>	<b>1,375</b>	<b>15,665</b>
Males	3,640	2,550	295	6,485	3,415	3,075	625	7,115
Females	4,260	3,165	270	7,695	4,110	3,690	750	8,550
<b>Other Learning Centre:</b>	<b>290</b>	<b>245</b>	<b>185</b>	<b>715</b>	<b>305</b>	<b>285</b>	<b>180</b>	<b>770</b>
Males	180	140	95	415	180	170	110	460
Females	110	105	90	300	125	110	70	310
<b>All Learning Centres:</b>	<b>16,680</b>	<b>14,080</b>	<b>5,430</b>	<b>36,185</b>	<b>16,210</b>	<b>14,150</b>	<b>6,100</b>	<b>36,460</b>
Males	7,970	6,610	2,595	17,180	7,705	6,740	2,965	17,415
Females	8,710	7,465	2,830	19,010	8,505	7,410	3,130	19,045

Source: Student Loans Company

(a) Age at start of academic year.

(b) As at 31 August 2010. Includes 19 year olds (see notes for explanation).

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

20,025 students attending further education colleges had their applications approved. These accounted for 55 per cent of all approved applications. 15,665 students attending secondary schools had their applications approved, accounting for 43 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 (a) (b)**

	2006/07	2007/08	2008/09	2009/10	2010/11
<b>All Learning Centres:</b>	<b>30,370</b>	<b>31,180</b>	<b>32,695</b>	<b>36,185</b>	<b>36,460</b>
Males	14,085	14,395	15,325	17,180	17,415
Females	16,285	16,785	17,370	19,010	19,045

Source: Student Loans Company

(a) 2006/07 figures as at 31 August 2007, 2007/08 as at 1 September 2008, 2008/09 as at 31 August 2009, 2009/10 as at 31 August 2010, and 2010/11 as at 31 August 2011.

(b) 2007/08, 2008/09, 2009/10 and 2010/11 data include 19 year olds who are eligible due to exceptional circumstances.

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

	2006/07	2007/08	2008/09	2009/10	2010/11
<b>Year Claiming EMA:</b>	<b>30,370</b>	<b>31,180</b>	<b>32,695</b>	<b>36,185</b>	<b>36,460</b>
1 <sup>st</sup>	17,295	17,045	17,740	19,535	18,415
2 <sup>nd</sup>	10,800	11,560	11,970	13,055	13,735
3 <sup>rd</sup>	2,280	2,515	2,980	3,590	4,300
4 <sup>th</sup>	-	60	5	5	10

Source: Student Loans Company

(a) 2006/07 figures are as at 31 August 2007, 2007/08 as at 1 September 2008, 2008/09 as at 31 August 2009, 2009/10 as at 31 August 2010 and 2010/11 as at 31 August 2011.

In 2010/11, 51 per cent of approved applications were from first year claimants. There were fewer approved applications overall in 2009/10 but a higher number and proportion (54 per cent) was from first year claimants.

Bonus payments of £100 are paid to students who are eligible for an EMA and make good progress against the objectives set out in their learning agreements in January and July of each academic year, with an additional bonus payment in September/October for those who have returned to learning for a second or subsequent year. The bonus payments are authorised by the learning centres and their purpose is to reward learning progression and provide additional incentives to students to continue their education to the best of their ability.

**Table 6: Number of bonuses paid, by learning centre type, gender and academic year**

	2009/10 (a)			2010/11 (b)		
	Sept 2009	Jan 2010	Jul 2010	Sept 2010	Jan 2011	Jul 2011
<b>Further Education College:</b>	<b>9,210</b>	<b>16,600</b>	<b>14,585</b>	<b>10,940</b>	<b>17,425</b>	<b>14,975</b>
Males	4,305	7,880	6,860	5,190	8,395	7,240
Females	4,905	8,720	7,725	5,750	9,030	7,735
<b>Secondary School:</b>	<b>4,965</b>	<b>11,225</b>	<b>10,480</b>	<b>6,080</b>	<b>11,745</b>	<b>11,090</b>
Males	2,205	5,040	4,710	2,800	5,255	4,990
Females	2,760	6,185	5,770	3,280	6,490	6,100
<b>Other Learning Centre:</b>	<b>320</b>	<b>585</b>	<b>505</b>	<b>415</b>	<b>655</b>	<b>615</b>
Males	180	340	285	235	370	350
Females	140	245	220	185	290	270
<b>All Learning Centres:</b>	<b>14,500</b>	<b>28,405</b>	<b>25,575</b>	<b>17,440</b>	<b>29,825</b>	<b>26,680</b>
Males	6,695	13,260	11,855	8,220	14,015	12,580
Females	7,805	15,145	13,720	9,220	15,810	14,105

Source: Student Loans Company

(a) As at 31 August 2010.

(b) As at 31 August 2011.

73,945 bonuses were paid in 2010/11 compared with 68,480 in 2009/10, an increase of 8 per cent. There was an increase in the number of bonuses paid for each of the three specific months, with the biggest increase being for those returning to learning in September (20 per cent). This is likely to be due to a combination of an increase in the number of returners (see table 5), and a change in the procedure for renewing applications for existing students in 2010/11. For the first time, returning students were not required to complete a renewal application form, instead continuing students were automatically approved for support in their second or third year of study. As usual, returning students were required to enter into a learning agreement with their learning centre and SLC commenced payment once in receipt of confirmation that this was completed.

## Annex 1: Notes

### 1. Context

#### 1.1 Policy/operational context

EMA (Education Maintenance Allowance) 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, 2010/11

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 2010.
- 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 within Wales or studying at least 12 guided hours a week at a recognised further education institution within Wales.
- 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.

Evidence of household income in the prior tax year determines the level of the weekly allowance:

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.

The data in this release were collected via the SLC management information system and were extracted on 5 September 2011. All information is based on applications received by 31 August 2011.

### 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 '\*'.

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

## 5. Equal Opportunities

14,860 Equal Opportunities monitoring forms were received in 2010/11, which equates to 39 per cent of 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.

The data as at 31 August 2011 show that of the applications for whom an equal opportunities form was completed:

- 5 per cent classed themselves as disabled;
- 95 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 2010/11 academic year (31 August 2011), and are correct as at 5 September 2011.

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%

### 6.3 Timeliness and Punctuality

For 2010/11 the first monthly publication on the number of EMA applications was released in December 2010, relating to applications up until the end of November 2010. 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 2010/11 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 2010/11 includes approximately 325 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 2010/11 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 who received an Education Maintenance Allowance (EMA) during the academic year 2009/10. The reported number of academic year 2010/11 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 SLC will 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 be 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) will be made to any students.

Northern Ireland and Scotland have their own EMA schemes. EMA closed to new applicants in England from 1 January 2011.

## 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 are confirmed as final (as at 31 August 2010) in [StatsWales table 013283](#), and will therefore differ slightly to what is seen in Table 1 of this Release, as these figures were those correct as at 31 July 2010.

2011/12 monthly data on EMA will be first released on 14 December 2011 and will include data up to the end of November 2011. 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>