

SDR 150/2015

23 September 2015

Education Maintenance Allowances Awarded in Wales, 2014/15

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 2014/15, as at the end of August 2015. The release is based on data provided by the Student Loans Company (SLC) and is correct as at 15th September 2015. This is the final in a series of monthly updates on 2014/15, 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.

There was a change in the household income criteria for students new to the EMA scheme in 2011/12. Returning EMA students, who continued to meet the eligibility criteria for the 2010/11 EMA scheme, would continue to get their EMA, be it for £10, £20 or £30 per week. Students new to EMA since 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. The performance bonus payments (previously paid in September, January and July) were removed at the end of academic year 2010/11, and are no longer paid out to any students.

2012/13 was the final year that £10 and £20 awards were given to returning students, after three years of receiving EMA. Therefore information for 2013/14 in this release relates to an award of £30. *Table 3* and *Chart 7* of *SDR 158/2013: Education Maintenance Allowances awarded in Wales 2012/13*, which showed a breakdown of approved applications by value of award for the latest academic year, have been removed.

Key results

Overall, approved applications for EMA were down on last year (5 per cent), whilst the total number of applications received was down by 3 per cent (*Charts 1 and 2*).

- A total of 30,465 applications were received for 2014/15, a decrease of 3 per cent compared with 2013/14 (*Chart 1, Table 1*).
- 28,770 (94 per cent) of applications received were approved, 845 (3 per cent) were rejected and 670 (2 per cent) were incomplete (*Chart 3, Table 1*).
- 11,905 (41 per cent) of approved applications were from 16 year olds, 11,640 (40 per cent) were from 17 year olds and 5,225 (18 per cent) were from 18 year olds and over (*Chart 5, Table 3*).
- 13,415 (47 per cent) of approved applications were from first year claimants (*Table 5*).

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Trends in EMA Applications and Approvals

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 2020¹. 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 EMA applications received by month and year of study

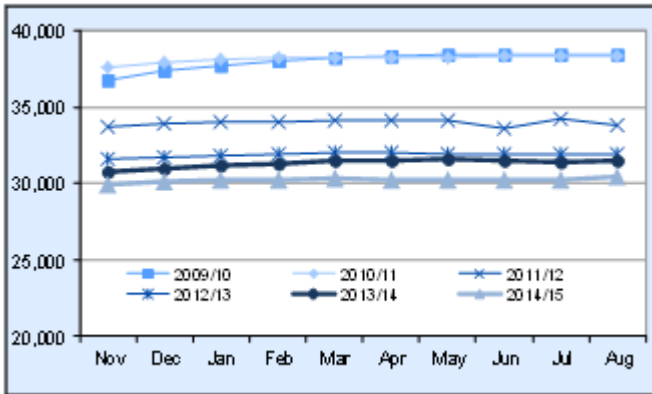
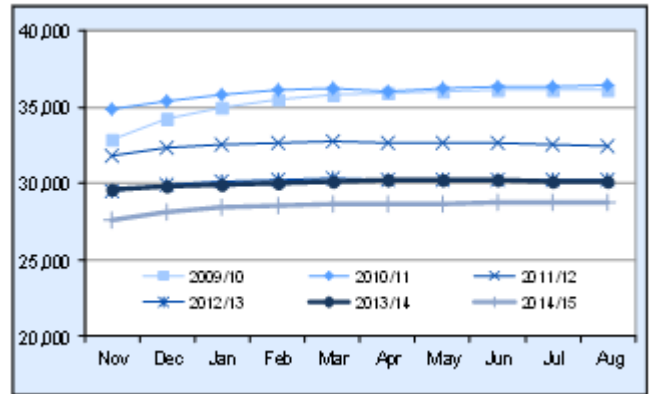


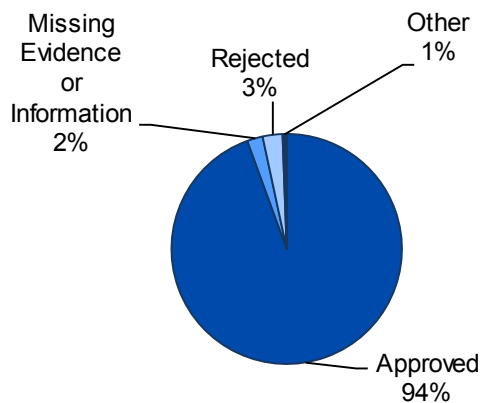
Chart 2: Cumulative number of approved EMA applications by month and year of study



Overall, approved applications for EMA were down 5 per cent on last year (*Chart 2*) whilst the total number of applications received was down by 3 per cent (*Chart 1*).

EMA Applications Received by Current Work Stage

Chart 3: Total EMA applications received by current work stage for 2014/15, as at 31 August 2015 (a)



As at 31 August 2015, 94 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 15th September 2015 when data were extracted from the Student Loans Company (SLC) database.

¹ [Population projections by year and gender](#) (2008 based)

Table 1: EMA applications by current work stage and gender, 2014/15 (a)

Application current work stage	Male	Female	Total
Approved	14,040	14,730	28,770
<i>of which received at least one payment</i>	13,820	14,540	28,365
Rejected	415	435	845
Incomplete (b)	330	340	670
Other (c)	75	100	175
Total	14,860	15,605	30,465
<i>of which are renewals (d)</i>	7,715	8,440	16,160

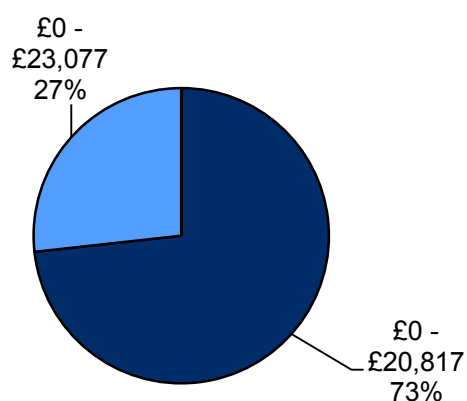
Source: Student Loans Company

- (a) As at 31 August 2015
- (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 assessment; validated; verified (as defined by SLC)
- (d) Applicants who also applied for an allowance in previous academic year

Of the total applications received, 49 per cent were from males and 51 per cent were from females. The same proportions apply to approved applications. These proportions were 48 per cent for males and 52 per cent for females in 2013/14.

Approved EMA Applications by Household Income Threshold Level

Chart 4: Approved EMA applications by household income threshold level, as at 31 August 2015 (a)



Of those entitled to a £30 award, 73 per cent of approved applications were from students with a household income threshold of £20,817 or less (independent students or only child in household), and 27 per cent were from 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) (Table 2).

(a) Current work stage denotes the status of the application at 15th September 2015 when data were extracted from the Student Loans Company (SLC) database.

Table 2: Approved EMA applications for a £30 award by household income threshold level (a)

	2010/11	2011/12	2012/13	2013/14	2014/15
Household threshold level					
£0 to £21,885	30,585	14,765	4,080	.	.
£0 to £20,817	.	10,405	17,905	21,840	21,065
£0 to £23,077	.	4,750	7,750	8,340	7,690
Unknown	0	20	25	0	10
Total	30,585	29,940	29,760	30,180	28,770

Source: Student Loans Company

(a) Figures as at 31 August
 "." denotes not applicable

Of those entitled to a £30 award, 21,065 applications come from students with a household income of £20,817 or less (independent students or only child in household), and 7,690 applications come 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).

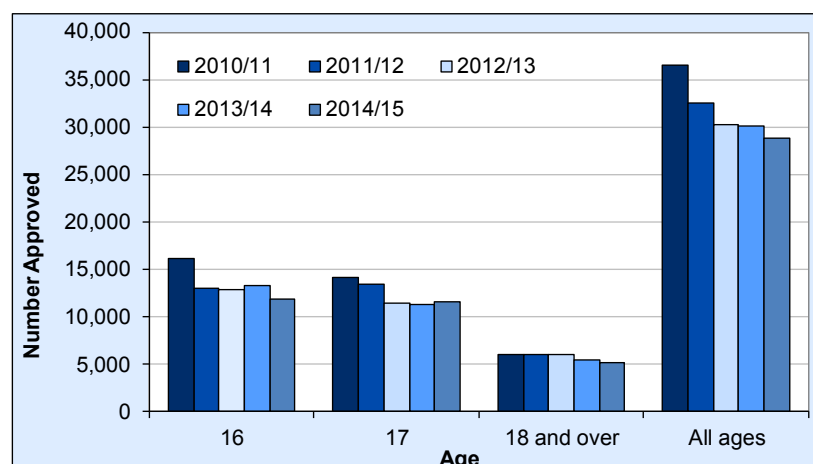
There was a change in the household income criteria for students new to the EMA scheme in 2011/12. Returning EMA students, who continued to meet the eligibility criteria for 2010/11 EMA scheme, would continue to get their EMA, be it for £10, £20 or £30 per week. 2012/13 was the final year that £10 and £20 awards were given to returning students, after three years of receiving EMA. Students new to EMA since 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.

2012/13 was the final year that £10 and £20 awards were given to returning students, after three years of receiving EMA. In 2013/14, only £30 awards were available. Therefore, care should be taken when making comparisons between 2013/14 onwards and previous years.

See [Notes](#) page for more information about household income criteria.

Approved EMA Applications by Age

Chart 5: Approved EMA applications by age (a)(b)



41 per cent of approved applications in 2014/15 were from 16 year olds, compared with 44 per cent in 2013/14. The percentage of applications from 17 year olds has increased from 38 per cent in 2013/14 to 40 per cent in 2014/15, whilst the percentage of applications from 18 year olds and over has remained the same at 18 per cent in 2014/15 (Table 3).

(a) Figures as at 31 August

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

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

	2013/14 (b)				2014/15 (c)			
	16	17	18+	Total	16	17	18+	Total
Further Education College:	7,830	7,275	4,760	19,865	7,195	7,535	4,585	19,320
Males	3,920	3,520	2,265	9,705	3,745	3,765	2,265	9,775
Females	3,905	3,760	2,495	10,160	3,450	3,770	2,320	9,540
Secondary School:	5,210	3,845	590	9,645	4,505	3,825	480	8,810
Males	2,390	1,675	315	4,380	1,990	1,650	225	3,865
Females	2,820	2,170	275	5,265	2,515	2,175	255	4,945
Other Learning Centre:	290	230	150	670	205	280	155	640
Males	180	135	100	415	135	165	95	395
Females	115	95	45	255	70	115	65	245
All Learning Centres:	13,330	11,355	5,495	30,180	11,905	11,640	5,225	28,770
Males	6,490	5,325	2,680	14,500	5,875	5,580	2,585	14,040
Females	6,840	6,025	2,815	15,680	6,035	6,060	2,640	14,730

Source: Student Loans Company

(a) Age at start of academic year

(b) As at 31 August 2014. Includes 19 year olds (see notes for explanation)

(c) As at 31 August 2015. Includes 19 and 20 year olds (see notes for explanation)

19,320 students attending further education colleges had their applications approved. These accounted for 67 per cent of all approved applications. 8,810 students attending secondary schools had their applications approved, accounting for 31 per cent of all approved applications. The remaining 2 per cent of approved applications were for students attending other learning centres².

² "Other learning centres" comprises of Special schools and Independent schools.

Approved EMA Applications by Gender

Table 4: Approved EMA applications by gender and academic year (a) (b)

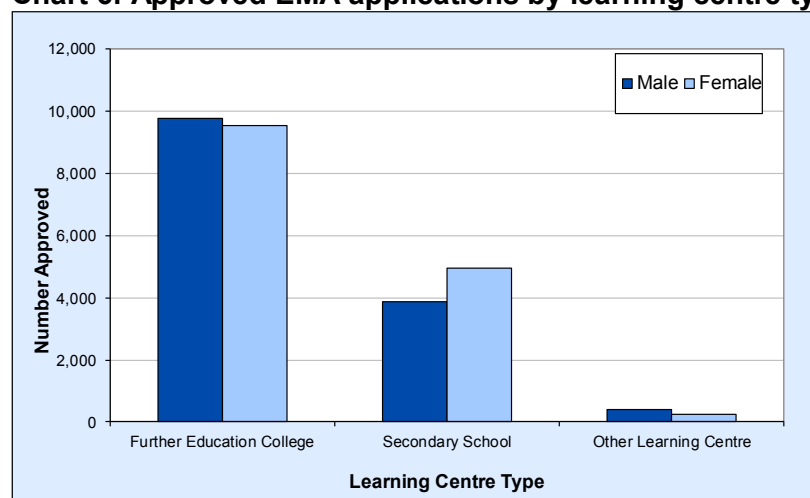
	2010/11	2011/12	2012/13	2013/14	2014/15
All Learning Centres:	36,460	32,520	30,270	30,180	28,770
Males	17,415	15,455	14,485	14,500	14,040
Females	19,045	17,065	15,785	15,680	14,730

Source: Student Loans Company

Figures as at 31 August

(a) Data include 19 and 20 year olds who are eligible due to exceptional circumstances

Chart 6: Approved EMA applications by learning centre type and gender, 2014/15



A higher proportion of approved applications were from males than females in further education colleges and other learning centres, (51 per cent and 62 per cent respectively) however only 642 approved applications were from students attending other learning centres.. 44 per cent of approved applications were from males secondary schools.

Approved EMA Applications by Year Claiming EMA

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

	2010/11	2011/12	2012/13	2013/14	2014/15
Year claiming EMA:	36,460	32,520	30,270	30,180	28,770
First	18,415	14,625	14,585	15,140	13,415
Second	13,735	13,305	10,865	10,885	11,410
Third	4,300	4,590	4,815	4,150	3,940
Fourth	10	*	5	*	10

Source: Student Loans Company

(a) Figures as at 31 August

In 2014/15, 13,415 applications (47 per cent) of approved applications were from first year claimants.

Annex: 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://gov.wales/docs/dcells/publications/101109emaen.pdf>

1.2 Eligibility criteria, 2014/15

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

Student criteria

- He/she is aged 16, 17 or 18 years old³ on 31 August 2015.
- 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, 2012/13 or 2013/14 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 from 2011/12 onwards (eligible for £30 award only):

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 met the eligibility criteria for the 2010/11 EMA scheme), continued to get their payments of £10, £20 or £30 per week until 2012/13. After three years of receiving EMA, these students have now exited the system. The table below shows the 2010/11 criteria for reference.

Returning EMA students who met 2010/11 criteria:

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

³ Entitlement may be extended to 19 and 20 year olds if they have not already received 3 years of EMA.

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. 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 15 September 2015. All information is based on applications received by 31 August 2015.

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

All the figures are rounded to the nearest 5 for confidentiality. Where figures have been rounded there may be an apparent discrepancy between the sum of the constituent items and the total.

The following symbols are used in the tables:

- the data item is not exactly zero, but is less than half the final digit shown.
- . the data item is not applicable.
- .. the data item is not available.
- * the data item is disclosive or not sufficiently robust for publication.

5. Equal Opportunities

8,157 Equal Opportunities monitoring forms were received in 2014/15, which equates to 27 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 1 September 2015 show that of the applications for which an equal opportunities form was completed:

- 8 per cent classed themselves as disabled;
- 92 per cent classed their ethnicity as white;
- 7 per cent made up each of the groups who were of mixed race, Asian or British Asian and 'Chinese or other ethnic origin';
- 2 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 2014/15 academic year (31 August 2015), and are correct as at 15 September 2015.

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
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%
2012/13	2.4%	1.1%	0.5%	0.1%	-0.2%	0.2%	0.0%	0.0%	0.0%	0.0%
2013/14	3.6%	1.6%	0.7%	0.5%	0.2%	-0.2%	-0.3%	-0.2%	0.0%	0.0%
2014/15	4.3%	2.0%	0.9%	0.7%	0.3%	0.2%	0.2%	0.1%	0.1%	0.0%

6.3 Timeliness and Punctuality

For academic year 2014/15, the first monthly publication on the number of EMA applications was released in December 2014, relating to applications up until the end of November 2014. Monthly updates during a given academic year are published as soon as possible on StatsWales, 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 2014/15 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). 2012/13 includes approximately 275 students who are 19, 2013/14 includes approximately 210 and 2014/15 includes approximately 251.

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. Returning EMA students (who met the eligibility criteria for the 2010/11 EMA scheme), continued to get their payments of £10, £20 or £30 per week until 2012/13. After three years of receiving EMA, these students have now exited the system. The performance bonus payments (previously paid in September, January and July) were removed at the end of academic year 2010/11, and are no longer paid out to any 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. List of Tables and Data Items Provided in StatsWales

- i. [Cumulative totals of applications for EMA by academic year and workstage](#)
(Chart 1 and Chart 2)
- ii. [Approved applications by learning centre type, gender and value of award](#)
(Table 2)

Further Information

Comparable monthly data and further detailed information on EMA applications can be found on the [StatsWales](#) website.

Further information about the EMA scheme can be found at www.StudentFinanceWales.co.uk.

Related articles

The Scottish Government publish statistics on recipients of EMA, for example in the following link: <http://www.gov.scot/Publications/2015/03/8891>

Statistical Releases on other strands of student support in Wales are available via the following link: <http://gov.wales/statistics-and-research/?topics=Education+and+skills&subtopics=Student+finance&view=Search+results&lang=en>

User Feedback

We want to engage with users of our statistics and we invite you to send your comments on the publication to post16ed.stats@wales.gsi.gov.uk

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