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Understanding Participation in Tertiary Education in Wales

Evidence Workstream 2024-2026

Insights Report – A synthesis of the evidence to date

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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Insights Report – A synthesis of the evidence to date

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Abbreviations

ALN	Additional Learning Needs
ALNET Act	Additional Learning Needs and Education Tribunal (Wales) Act 2018
CYPE Committee	Children, Young People and Education Senedd Committee
HE	Higher education
HEP	Higher education provider
HEFCW	Higher Education Funding Council Wales
HESA	Higher Education Statistics Agency student record
FCF	Financial contingency fund
FEI	Further education institutions
FSM	Free school meals
ISPIs	Independent Special Post-16 Institutions
LLWR	Lifelong Learning Wales Record
NET	Not in education or training
NEET	Not in education, employment or training
OECD	Organisation for Economic Co-operation and Development
PLASC	Pupil level annual school census
PISA	Programme for International Student Assessment
SEN	Special educational needs
STEM	Science, technology, engineering and mathematics
TE	Tertiary education
TEI	Tertiary education institution
VET	Vocational education and training
WIMD	Welsh Index of Multiple Deprivation
WCPP	Wales Centre for Public Policy
YEPF	Youth Engagement Progression Framework

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1. Introduction

1.1. Background

A downward trend in Welsh-domiciled learners' participation in tertiary education (TE) has been observed in recent years. Moreover, the [Transitions to Employment](#) report, the [Review of Vocational Qualifications in Wales](#) and the [Young Person's Guarantee national conversation](#) show that there are a number of barriers that can hinder successful and smooth transitions to post-16 education and training.

In February 2024, Welsh Ministers published a [Statement of Strategic Priorities for TE and Research and Innovation](#), to comply with the *Tertiary Education and Research (Wales) Act 2022*. Many of the strategic priorities pointed to the requirements for robust relevant and timely data and evidence. The Act requires Medr to establish and operate a Register of higher education providers from 1 August 2026 and oversee their compliance with a range of conditions of registration¹. Medr's Equality of Opportunity and Welsh Language Conditions include specific reference to participation. Medr undertook a two-phase formal consultation process (May 2025 and October 2025) alongside engagement with the sector, representative bodies, and learners. Medr will be publishing the new Regulatory Framework in April 2026 for application to the register and implementation of funding conditions from 1 August 2026.

Upon appointment in September 2024, the Minister for Further and Higher Education [commissioned an evidence workstream](#) to build the evidence base in Wales in order to be able to better inform programme delivery in the future. *This report* brings together the latest findings from across the evidence workstream. Full details can be found in separate full research reports and statistical papers.

The [Children, Young People and Education \(CYPE\) Committee](#) initiated an inquiry into 'routes into post-16 education and training' in late 2024, in response to challenges

¹ A subset of those conditions apply as conditions of funding to the broader tertiary sector from 1 August 2026 - namely further education, adult community learning and apprenticeships, to which they apply from 1 August 2027.

experienced in participation. The [final report](#) was published in November 2025, with a Welsh Government response in January 2026.

In January 2026, a Welsh Government paper entitled '[The Future of TE in Wales: Five challenges and calls for submission](#)' laid out the evidence base on five challenges facing the tertiary system in Wales:

- Participation and equality– ensuring that everyone, regardless of background, can access and succeed in further and higher education.
- Demographic change and lifelong learning – responding to an ageing population and supporting learning throughout life.
- Competition and collaboration – supporting strong partnership working across the sector.
- Financial sustainability – ensuring institutions can deliver high-quality education and research on a secure financial footing.
- Delivering for the economy of the future – aligning education with the needs of the evolving economy

In March 2026, the [Strategic Direction for Vocational Education and Training](#) (VET) was published, which sets out the Welsh Government's ambitions for strengthening VET provision in Wales, which includes National Priority Three: Participation and Progression.

1.2. Education reforms in Wales

The education landscape in Wales, both pre and post-16 has been dynamic and reform-driven in recent years, with major legislative reform reshaping learner experiences and pathways. The rollout period for key reforms occurred during the period of evidence collection for many of the projects contributing to this report. The impact of the reforms on post-16 participation will not be realised at this time, however, they are anticipated to have an impact on participation in TE going forward. Relevant reforms include:

- The roll-out of the Curriculum for Wales from 2022. The rollout was extended to year 10 learners in 2025. Under **the 14-16 Learner Entitlement**, Year 10 and 11 curriculum should be designed with reference to four components which includes post-16 planning. The Curriculum for Wales has an ongoing programme of [formative evaluation](#) to provide insights on how it is being realised. A range of research studies and a synthesis report have been published to date.
- **Additional learning needs reform:** the Additional Learning Needs and Education Tribunal (Wales) Act 2018 (ALNET) and the accompanying Additional Learning Needs (ALN) Code for Wales 2021 introduced new arrangements for supporting learners with additional learning needs and created statutory guidance for maintained schools and further education institutions, to replace those for special educational needs by September 2025. There is an ongoing [formative evaluation](#) of the Additional Learning Needs system with several outputs to date.
- **14-16 qualifications reform:** Following the introduction of the Curriculum for Wales, wave 1 of the new [National 14-16 Qualifications](#) suite began being taught in schools from September 2025. Wave 3 of the reformed qualifications (being taught from September 2027) includes Vocational Certificate of Secondary Education (VCSE) qualifications to support broader learner development.
- The **Tertiary Education and Research (Wales) Act 2022** is reshaping the post-16 education and research landscape in Wales. This includes the establishment of the Commission for Tertiary Education and Research, [Medr](#). One of the 11 strategic duties placed on Medr is ‘Encouraging Participation’.

1.3. Purpose of this report

This evidence synthesis report serves three purposes:

- 1) To provide up-to-date Welsh-specific insights on barriers to participation and themes emerging for the tertiary education sector in relation to participation

which are *additional* to those contained within the [Future of Tertiary Education in Wales report](#). For succinctness, this report does not repeat analysis and findings already presented and therefore should be read alongside this previous report for full coverage.

- 2) To signpost the reader to the evidence base for further background and detail.
- 3) To highlight evidence gaps and areas requiring further research and analysis.

2. Evidence workstream

2.1. Key research questions

The evidence workstream sought to answer a number of key research questions:

- How has participation changed over time? Which learner groups are under-represented?
- What are the barriers to accessing TE? How do these barriers differ across the sector?
- What are the areas of strength, and areas for improvement, in Wales?

2.2. Defining participation

Tertiary education (TE) is defined as any form of post-compulsory education and includes A levels, vocational learning, higher education, work-based learning, apprenticeships and adult learning.

For the purposes of the evidence workstream, participation is defined broadly to encompass entry (enrolment), completion and outcomes. These indicators may not be available across all forms of TE or all subgroups but where available provide a picture of learners' journeys from application, whether they stay in courses and complete any measurable outcomes such as qualifications and employment.

2.3. Summary of research and evidence undertaken

A triangulation approach was taken to understanding participation, with research and analysis commissioned across a number of methodological strands, to provide a multi-

faceted view of participation in TE. An equalities lens was adopted throughout with consideration of evidence by learner characteristics including sex, ethnicity, disability, care experience, and learning through the medium of Welsh.

An analyst steering group was established with membership from Welsh Government, Medr, Careers Wales and Qualifications Wales. Where possible, external evidence produced during the lifespan of the workstream has been reflected on within the evidence base.

This report synthesises evidence from the reviews, evaluations and statistical releases available at the time of writing. There are further outputs due to be published later in 2026 that have not been reflected within this report.

A list of all research and statistics outputs published during the evidence workstream and their links can be found here: <https://www.gov.wales/participation-tertiary-education-evidence-workstream>

Data analytics and linkage

A series of projects utilising data linkage were commissioned as foundational research to understand trends in participation data with sub-analysis for learner characteristics. This includes analysis on level 2 and level 3 destinations which is due to be published shortly.

Medr published data on the [progression of learners from year 11 into TE](#) covering the period August 2017 to January 2025. The latest release, including data to November 2025 is due to be published [shortly](#).

Academic partners in ADR Wales were commissioned to undertake a data linkage project to understand how participation by under-represented groups has changed over time. The analysis builds on work by the same authors utilising more recent data; the [previous analysis](#) of linked education data until 2017/2018 estimated the non-progression rate to post-compulsory education and training was twice as high for learners from deprived backgrounds (Huxley & Davies, 2024). The new data report

will be published shortly and therefore the findings of the analysis are not included in this report.

Analysis conducted by the Data Acquisition and Linking for Research team (DALfR), which is the Welsh Government component of the Administrative Data Research (ADR) Wales partnership, used linked data² covering the period September 2016 to August 2025 to investigate the [strength of school attendance as a predictor of progression to post-16 education](#), with findings published in February 2026.

Evidence reviews

A series of evidence reviews were undertaken to provide in-depth and up-to-date understanding from a Welsh lens on a number of key areas including barriers to participation, evidence on effective interventions, and a deep dive on the drivers of non-participation for learners with certain demographics. An [evidence review of barriers to HE](#) was published to support the evaluation of the Diamond reforms, in line with the [evidence plan](#).

Evaluation and review of existing interventions

Several elements of fieldwork were undertaken with learners and young people as part of evaluation activity. Learner voice was central to the fieldwork undertaken, with input from learners in years 11, 12 and 13, HE learners and learners across further education, including work-based learning.

Fieldwork was undertaken with TE stakeholders, including representatives from TE providers and sector stakeholders including Medr, Student Loans Company (SLC), Universities Wales, National Union of Students (NUS) Wales, Coleg Cymraeg Cenedlaethol, Careers Wales, Voices from Care Cymru, Care Leavers Activities and Student Support (CLASS) Cymru, National Youth Advocacy Service (NYAS) Cymru and Reaching Wider Partnership.

² Linked datasets were the Pupil Level Annual School Census (PLASC), the post-16 education data collection, the Lifelong Learning Wales Record (LLWR) and school attendance weekly management information data

Diamond reforms

In December 2024, an [evaluation plan](#) was published which set out across six work packages the approach to evaluating the Diamond Reforms to student finance in Wales within the context of the wider TE sector.

[Research to inform the evaluation of the Diamond Reforms to student finance in Wales](#) was published in March 2026, focused on evaluating three specific objectives of the Diamond reforms, namely, widening access, strengthening part-time provision, and strengthening postgraduate provision.

Welsh Government Learning Grant (WGLG) in FE

[The evaluation of the WGLG \(Further Education\)](#) examined the delivery and impact of the means tested grant for adult FE learners in Wales. The evaluation was published in March 2026 and explores trends in applications and awards over time, the profile and circumstances of applicants, and how the grant aligns with current further education participation patterns and financial pressures through analysis of published data, interviews, focus groups and a survey of applicants.

Wider relevant research and evidence

Additional relevant Welsh Government commissioned research published during the evidence gathering period which provides insight on TE participation includes:

- [Young Person's Guarantee](#)

The evaluation reviewed the design, implementation, and delivery of the Young Person's Guarantee (YPG) against its strategic intent and intended outcomes. The evaluation involved reviews of secondary sources and qualitative research with stakeholders and young people in Wales. The [final report](#) was published in September 2025.

- [Learner Experiences in post-16 education survey](#)

In order to improve understanding of the experiences of learners aged 16 to 24 in further education, a survey was conducted in April and May 2024. The [report of survey findings](#) was published in December 2024.

- [Teenage career development in Wales](#)

This analysis commissioned by the Welsh Government considers findings from the OECD Programme for International Student Assessment (PISA), a comparative international survey of young people in secondary education. PISA 2022 provides considerable data on young people's engagement in, and perceptions of, career development, including information on occupational and educational intentions and participation in career development activities. The [working paper](#), published in March 2025, compares student responses in Wales to averages across the OECD.

- [Education Maintenance Allowance](#)

The review of the [Education Maintenance Allowance](#) (EMA) assessed how the scheme operates, who it supports, and its contribution to learners' engagement and wellbeing. The review combined analysis of management information with survey data, fieldwork in schools and FE colleges, and stakeholder interviews, and the [final report](#) was published in July 2024. [In response](#), Welsh Government increased the household income thresholds for EMA for eligible new and continuing learners from academic year 2025 to 2026 at the rate recommended.

- [Additional Learning Needs \(ALN\) system](#)

The Welsh Government commissioned a four-year formative evaluation of the implementation of the ALN system. Findings from [a survey exploring practitioners and professionals views](#), including those in FE, were published in March 2025, followed by findings from a [survey of parents and carers](#). The Wave 1 report of a Local Area Studies element is due to be published in late March 2026.

- [Jobs Growth Wales+](#)

Jobs Growth Wales+ is a programme delivering training, development and employment support to 16 to 19 year olds who are not in education, employment or training (NEET). An [independent evaluation](#) reported in June 2025 and includes education and training destinations following support.

- [Basic Income for care leavers in Wales](#)

A comprehensive evaluation has been commissioned and the [third annual evaluation report](#) recently published, which includes participants' narratives on the effects of the basic income on their choices around engaging in education, training and employment. The final evaluation report is expected in the summer of 2027.

- [Insights from ADR Wales](#)

During the lifespan of the evidence workstream, [ADR Wales](#) have produced a number of data insights and reports utilising linked administrative data related to participation in TE which contribute to the evidence base. Where possible and available at the time of writing, these findings have been synthesised in this report. These include:

- Data Insight reports to explore the Welsh language and progression to higher education
- Moving on: Who receives careers advice and guidance following compulsory education?
- [Year 11 attendance and progression to post-16 education: September 2016 to August 2024](#)
- [The Role of Maths, Science, and English/Welsh GCSE Attainment in Post-16 Subject Progression](#)

3. Summary of findings

Findings from across the evidence workstream have been considered against the research questions. The synthesis focused on Welsh-domiciled learners and their participation in TE. For HE, the focus is on participation anywhere in the UK. Data on trends in enrolments in HEPs in Wales was not in scope.

3.1. How has participation changed over time? Which learner groups are under-represented?

Evidence on recent trends in participation in TE was presented in detail in section 2.1 of the [Future of tertiary education in Wales](#) paper and includes evidence detailing:

- a growth in demand for FE especially at lower qualification levels,
- declining school sixth forms learner numbers and the number of school sixth forms themselves,
- lower participation rates in HE than the rest of the UK at age 18,
- a greater proportion of students entering HE part-time and at a later age.

Medr have since published the latest statistics on FE during the 2024/25 academic year. This latest release evidences a continuation of the trend for growth in FE demand, with full-time FE learners increasing to a record high, and provisional data suggesting further continuation in 2025/26 (Medr, 2026). Level 2 full-time FE numbers continue to rise. The number of part-time learners in FE decreased in 2024/25 for the first time in 4 years.

This report provides additional insights related to learner demographics and representation in TE, with prominent differences in learner pathways for different learner characteristics, detailed in chapter 4.

In addition, there is evidence of regional variability in participation. There are stark regional differences across the Welsh economic regions in the proportion of young

people not in education, employment or training (NEET)³. North Wales had the highest rate of young people who were NEET (15.4% in the three-year period ending September 2025) and South East Wales had the lowest rate at 12.8% ([Welsh Government, 2026](#)). Similarly, analysis of Careers Wales Destination Survey data shows marked variation in NEET rates across Local Authorities, strongly associated with levels of socio-economic deprivation. Access-related factors, including transport and proximity to education, training and employment opportunities, also appear to contribute to local variation, particularly in more rural areas ([Careers Wales, 2025](#)). When looking at [progression to HE within 4 years of the end of key stage 4](#), Blaenau Gwent and Torfaen have the lowest proportion of key stage 4 learners progressing to HE (31.5% and 32.1% respectively), whereas the Vale of Glamorgan and Cardiff have the highest proportion (48.9% and 49.6% respectively) ([Stats Wales, 2026](#)).

Additional insights specifically on participation outcomes include:

- A 5% rise from the previous year in the numbers of qualifications achieved by Welsh students studying in the UK in 2024/25 due to an increase in undergraduate qualifications, while the number of postgraduate qualifications achieved continued to fall ([Medr, 2026](#))
- For graduates responding to the 2022/23 Graduate Outcomes survey, 70% of respondents from Wales were in paid employment, 6% were doing further studies 11% were doing a combination of work and further studies, and 4% were unemployed. These figures are generally similar to English graduates with marginally fewer Welsh graduates being unemployed relative to English graduates ([Medr, 2025](#)).

³ The definitive source for NEET information is the [annual statistical first release \(SFR\), Participation of young people in education and the labour market](#), which uses a range of data sources to estimate participation. Annual Population Survey (APS) estimates ([Young people not in education, employment or training \(NEET\): October 2024 to September 2025 \[HTML\] | GOV.WALES](#)) are presented here as despite being less robust than the SFR estimates these provide additional breakdowns by protected characteristics and geography.

3.2. What are the barriers to accessing TE? How do these barriers differ across the sector?

Barriers are factors that inhibit access to participation and progression within TE. A series of evidence reviews have considered a range of structural and emerging barriers both to access to TE, and to continued progression through and achievement within TE. Moreover, fieldwork with a range of learners and stakeholders explored experiences and perceptions of barriers.

Many barriers overlap and inter-relate and can compound to reduce participation. Barriers are not specific to one sector of TE, however there are differences in how they manifest across the sector due to the nature of the barrier.

Inequality in TE

Inequality remains a major barrier to TE participation. Pronounced gender and disadvantage attainment gaps shape learner pathways, and entrenched poverty makes access to TE systematically harder. These structural inequalities, explored in Chapter 4, underpin many of the participation patterns observed across the evidence base.

Structural barriers within pre-16 education

Wales has lower GCSE attainment than England and Northern Ireland. Although results improved in 2025 compared with 2024, attainment remains below the UK average ([Joint Council for Qualifications, 2025](#)). Lower attainment at age 16 limits access to A levels and other gateway qualifications required for HE. In 2024/25, the proportion of learners progressing from Year 11 to AS levels was at its lowest in eight years, while progression to level 2 provision was at its highest ([Medr, 2025](#)).

Year 11 attendance plays a central role in shaping learner pathways and strongly predicts post-16 outcomes. Lower attendance is associated with a reduced likelihood of progressing to TE, a higher risk of non-completion in post-16 education and a greater likelihood of choosing vocational rather than AS level qualifications. Although the strength of the attendance-progression link has weakened following the COVID-

19 pandemic, attendance remains a stronger predictor than sex, ethnicity, FSM eligibility, English as an additional language, national identity, and school language medium ([Welsh Government, 2026](#)).

Stakeholders contributing to the Diamond reforms research highlighted broader systemic pressures shaping post-16 progression, including lower school attendance since the pandemic, more AS Level learners not continuing to A Levels; increased behavioural and wellbeing issues, and rising elective home education. These factors reduce the pool of learners able to meet entry requirements for many TE pathways.

“By the time learners get to 16 or 18, many have already been filtered out by the system. It’s GCSE performance that drives everything.” [Stakeholder, Diamond reform research]

Financial barriers

A key theme that emerged across the range of evidence was that whilst the cost of studying was a key concern for most learners, cost alone did not deter entry to TE but instead shaped how and when learners engage.

A minority of EMA recipients reported that the allowance was the deciding factor in them staying in education, with most saying they would have stayed on anyway. However, the allowance played a significant mitigating role in enabling continued participation primarily by offsetting essential costs which would otherwise pose barriers to attendance and engagement. For both WGLG and EMA, a substantial majority of unsuccessful applicants surveyed still started and continued their studies without funding.

Evidence from fieldwork undertaken as part of the evaluation of the Diamond reforms found that the cost of study was a key concern for learners and parents/guardians and had a bearing upon decision making, including where and what learners choose to study. However, for most people contributing to the research, whilst student debt was a source of worry, it did not deter entry into HE. Young people were found to recognise the value of HE but are also questioning whether all degrees offer a good return on

their investment. Correspondingly, financial uncertainty, fear of debt, and doubts about graduate job prospects remain significant barriers.

For postgraduate HE participation, the majority of taught master's students surveyed thought that their qualification was worth incurring student loan debt ([Welsh Government, 2026](#)) whilst wider research suggests the UK general public hugely overestimate graduate regret and the negative impact of university debt on the lives of graduates ([HEPI, 2025](#)).

Learners are increasingly finding it financially necessary to engage in paid employment alongside their studies suggesting a changing nature of TE participation. Research found that maintenance support across the UK, provided to support students in HE to meet their living costs, falls short, even for students receiving the maximum support available. For those studying outside of London, the Welsh maintenance support covers 65% of students' costs (compared with 55% for English students) ([HEPI, 2024](#)), and more than 15 hours a week of paid work is needed for Welsh students to reach a minimum standard of living ([HEPI, 2025](#)).

Learner travel

Issues associated with travel to a place of learning emerged as a prominent theme across several research reports. This reiterates findings from the Young Person's Guarantee [National Conversation report](#), in which young people reported transport as the most commonly identified barrier to education, employment and training, with young people reporting that public transport timetables do not always align with course start and finish times ([Welsh Government, 2024](#)).

- The cost, reliability and availability of public transport were frequently cited as a barrier to starting a new course or training programme
- Transport accounted for the largest number and value of awards made for the Financial Contingency Fund in 2022/23 ([Welsh Government, 2024](#))
- Young people are more reliant on public transport as their main mode of travel and are thus more vulnerable to rising costs. The unaffordability of transport to learning providers can result in poor attendance, retention and non-completion

- Cost of travel can influence low-income learners' choice of TE pathway in particular; learners from low-income families are more likely to choose course options closer to home to save on transport costs. In the review of EMA, learners just above the income threshold (i.e. not in receipt of EMA) describe transport costs as prohibitive, with EMA recipients heavily relying on it to get to college:

"The cost of transport is a barrier to me having free choice to attend the college I wanted to go to" (Open text response, FE learner survey 2024)

I can't get any jobs out of this town because I have got no transport to get there, and public transport would be too expensive for me every day. (Contributor to Process Evaluation of the YPG, 2025)

Administrative barriers

A range of administrative barriers emerged from the research.

[The review of the WGLG \(FE\)](#) found that the introduction of an online application has improved the application experience, but some groups including older learners, refugees, and those with additional learning needs face greater barriers to applying. Common issues include confusion between registration and full application, challenges in providing eligibility documentation, and a need for accessible or easy-read forms.

The complexity of student finance systems structurally disadvantages learners whose families lack HE experience or financial literacy, particularly lower income households ([Welsh Government, 2026](#)).

Administrative rules around student finance meant that some learner groups reported feeling disadvantaged relative to others. For example, contributions to the evaluation of the Diamond reforms included that the use of household rather than individual income to assess eligibility can disadvantage students with partners, especially where finances are not shared. Some part-time students also felt penalised through reduced

access to benefits or council tax discounts, making it harder to balance study with financial obligations.

3.3. Areas of strength and areas for improvement in Wales

When evaluating interventions, prominent contextual factors make it difficult to attribute outcomes to a single intervention or policy; for example, stakeholders found it difficult to isolate the impact of the Diamond reforms from wider external factors and pandemic-related trends.

Financial support supports participation

Evaluations of financial support packages found evidence of a positive impact on TE participation. Evidence from a range of sources suggest however that financial support alone is not sufficient: it works best when combined with outreach, guidance, and wraparound support.

- The WGLG (FE) scheme was found to enable a large number of students to stay in further education with grant recipients frequently progressing into higher level qualifications, sustaining learning pathways. The scheme was found to fill a clear gap in financial support for adult learners seeking to return to, or progress within FE, contributing to the Welsh Government's objective of increasing the number of working-age adults achieving a Level 3 qualification
- The Diamond Reforms have strengthened part-time and postgraduate participation, with evidence that enhanced financial support has played a significant role in enabling access for underrepresented groups, although some barriers remain.
- EMA was found to support participation in TE in Wales by reducing cost barriers, boosting attendance and retention, supporting vulnerable groups and increasing stability and readiness for progression in TE pathways. Several schools noted that EMA recipients were applying for university, and some used EMA for attending open days, which raised aspirations toward HE.
- Issues emerged around the impact of static income thresholds with a narrower, smaller group of learners now able to access financial support. For example, the

number of WGLG (FE) successful applications has declined over time (decreased by 18% between the 2023 to 2024 and the 2024 to 2025 academic year), with the volume of supported learners halving over the last decade (3.9% of learners aged 19 or over received WGLG in 2024 to 2025 academic year) whilst in HE, grants now account for a smaller proportion of the overall support package.

Part-time and flexible learning as key mechanisms for participation

Increased investment in part-time pathways has widened access in Wales, which continues to have higher proportions of mature and part-time HE students than England.

Part-time enrolments have grown significantly since 2018/19, and have doubled since 2017/18, with the Diamond Reforms playing a central role in this expansion, with Wales now having the highest proportion of part-time students in the UK.

Demand across HEPs for part-time study is uneven. Part-time entrants make up 34-40% of all undergraduate entrants in Wales (2016/17–2023/24) and more than half of all part-time students study at the Open University. Around half of the Open University student population are widening access learners, including those with lower prior qualifications, carers, and disabled students ([Welsh Government, 2026](#)).

Evidence from the [Diamond reforms evaluation](#) shows that many students pursue part-time study out of necessity due to work and personal circumstances. Learners reported that the availability of part-time student finance was critical to their ability to study. Part time routes were found to particularly support mature learners, parents and carers, learners with disabilities or health conditions, lower-income learners and those lacking formal qualifications who require a more flexible entry point.

“I’m a single parent with three children. Full-time study would be too much. I chose part-time to work around care responsibilities.” [Diamond reforms evaluation]

“The flexibility is great. With the Open University, I can take breaks or study at a minimum pace. I can work, be there for my daughter, and progress at my own pace without too much stress. For me, the flexibility outweighs the financial considerations.”

Providers also noted growing demand for shorter and more flexible, industry-aligned part-time provision, particularly programmes designed in partnership with employers rather than standard full-time degrees offered on a part-time basis. However, providers reported challenges with delivering flexible, modular or hybrid provision, which is costly and not adequately supported by the current funding model. Stakeholders suggested that widening access could be further strengthened by reforms that better support flexible study pathways, including multiple entry points outside the traditional academic year, benefiting students who study part-time, take career breaks, or have caring responsibilities. The funding model for part-time undergraduate provision was viewed as complex, and not reflective of the higher costs associated with delivery.

Systemic lack of early awareness of financial support mechanisms

There is a paradox: Wales provides the most generous maintenance support package of all UK nations yet for 18-year-olds, has the lowest full-time undergraduate participation rate. A prominent finding across the evidence workstream is a lack of *early* awareness and understanding of available financial support which may help explain this paradox, particularly for disadvantaged learners.

“It’s a great package, but it’s not promoted well enough. The message doesn’t get through to the people who most need to hear it.” [Diamond reforms evaluation]

Research on the Diamond reforms found that understanding of student finance and repayment terms is often limited, particularly among prospective students and parents/guardians from lower-income households. Fieldwork with year 12 and 13 learners found a strong desire for clearer more transparent student finance information, with many describing the system as confusing and overwhelming. Interviewed learners struggled to differentiate between types of loans and grants, many were unclear about repayment terms, and felt underprepared for managing money independently. A key recommendation for the Welsh Government, in partnership with other stakeholders, was to consider how awareness and understanding of the student finance support could be improved.

“We have to talk about finance without scaring them - showing that it’s support, not debt. That message has to start early.”

Evidence highlighted opportunities to better target information for those advising learners to improving their awareness around financial support and eligibility. Care-experienced learners contributing to the review of the EMA reported occasions where they received inconsistent or incorrect information from professionals supporting them. Similarly, in the WGLG review, concerns were raised around the impact of misinformation on learners’ inclination to apply for financial support.

“It should be made clear if applying for WGLG affects learners benefits as there is currently conflicting information about receiving WGLG and benefit payments. Especially for those who have dependents. This puts off people applying for WGLG or even returning to studies.” [WGLG review]

Timing is a further challenge. Many learners only became aware of financial support *after* starting their course, limiting its influence on post-16 decision making. Year 11 pupils contributing to the [EMA review](#) had very little knowledge of available financial support and around half of FE college recipients first heard about EMA during enrolment week. Learners felt that earlier awareness, ideally from year 9, would help families plan, especially where finances might otherwise constrain participation. The [review of the WGLG \(FE\)](#) similarly found low awareness among prospective applicants and highlighted the need for more digital, accessible promotional resources.

Inconsistencies across the sector

A number of inconsistencies emerged throughout the research which can shape participation and create sharp drop offs and inequalities across a learner’s pathway. Participation rates vary substantially between schools, FE colleges, and local authorities, with differences between institutions often greater than those explained by individual learner characteristics or attainment.

Support for transport costs varies widely. Due to the geographical distribution of TE provision in Wales, school and college cohorts often include learners from more than one local authority. Consequently, learners attending the same provider may receive

very different levels of assistance depending on their local authority, with some areas offering fully funded transport while others provide none. Several FEIs reported part-funding transport costs themselves to mitigate these disparities. Similar variation was evidenced in local authority travel charges and in areas where sixth form provision has been restructured, resulting in one instance where free transport was available to the local FE college but not to school sixth form.

Financial support thresholds also lack alignment. Income thresholds differ across EMA, WGLG (FE) and HE student finance. In FE in particular, concern was expressed that the drop in income thresholds disrupts progression when low-income learners become 19.

“For one child they can get up to £23,401 income on EMA, but for WGLG it drops to £18,370... it’s ridiculous. We’re supporting them one year, then they move on and we’re saying, sorry, you’re not eligible anymore.”

4. Learner demographics and participation

The latest evidence continues to show persistent participation inequalities based on learner demographics. Evidence on inequalities is presented in the [Future of tertiary education in Wales](#) paper; only insights additional to this paper are presented here. A more up-to-date picture on equity in TE will be provided by the data linkage work commissioned by the Welsh Government to ADR Wales which is due to be published in Spring 2026.

Taking a comprehensive intersectional approach was beyond the scope of the workstream, however the analysis provides indications for further in-depth follow on research.

4.1. Deprivation

Socioeconomic status and deprivation are one of the strongest determinants of participation in TE, impacting on progression, pathways and choices within TE.

Socioeconomic disadvantage impacts on educational attainment at all stages of education. In Wales and the UK more generally, differences in educational attainment are evident early in childhood and across all stages of education; for example, the Millennium Cohort Study evidences socioeconomic differences in attainment at aged three.

The attainment gap has widened since the COVID-19 pandemic and fewer learners eligible for FSM achieve GCSE grades at A/7 or above (7% compared to 22.3% for non-eligible learners), and at C/4 or above (39.0% compared to 68.3% for non-eligible learners), compared to their peers ([Welsh Government, 2025](#)). The gap in GCSE results between disadvantaged and other pupils in Wales was equivalent to 22-23 months of educational progress in 2019, substantially larger than the gap in England (19 months) and was largely unchanged over the previous decade ([Institute for Fiscal Studies, 2024](#)).

Learners eligible for free school meals (FSM) are much less likely to attend TE as compared with non-eligible learners and this participation gap has grown in recent years.

Fewer learners in 2024/2025 attended Sixth Form compared to FE colleges, and this is particularly the case for learners eligible for FSM. Learners from the most deprived neighborhoods in Wales were over-represented in full-time further education whilst learners from the least deprived neighbourhoods⁴ were under-represented ([Medr, 2025](#)). In summer 2025, the attainment gaps in top grades achieved at AS and A level between learners in the most and least deprived areas were narrower than in summer 2024. ([Qualification Wales, 2025](#)).

Social barriers impact upon post-16 progression and education outcomes of Welsh learners from socially disadvantaged backgrounds ([OECD, 2025:11](#)). PISA 2022 data highlights that Welsh learners from low socio-economic backgrounds are less likely to discuss their career plans with others, and engage in career development

⁴ Deprivation defined using WIMD 2019 [Welsh Index of Multiple Deprivation \(full Index update with ranks\): 2019 | GOV.WALES](#)

opportunities, and have lower education and employment aspirations ([Higher Educational Policy Institute, 2024](#); [OECD, 2025](#)).

Whilst in England there has been an increase in the number of disadvantaged students getting a place at university, in Wales there has been a steady decrease since 2023 ([UCAS, 2024](#)). Learners in the most deprived areas of Wales are less likely to progress to university than peers in the least deprived areas ([HEPI, 2024](#)) and, the HE participation gap in 2025 was the widest since records began in 2005 ([HEPI, 2024](#); [UK Government, 2025](#)). For those that do enrol in HE, there is a further gap in HE attainment which has widened in recent years, with fewer disadvantaged learners achieving a first or upper second-class degree relative to more advantaged learners. The gap is wider in Wales than other UK nations ([HESA, 2023](#)).

Upon graduation, full-time undergraduate respondents to the 2022/23 Graduate Outcome survey from the most deprived neighbourhoods were found to be less likely to be in full-time employment or further studies, and more likely to be in part-time employment, than those from the least deprived neighbourhoods ([Medr, 2025](#)).

4.2. Ethnicity

[The Anti-racist Wales Action Plan](#) sets out the vision for Wales to be an anti-racist country. In the [2024 update](#) on research and evidence in education settings, the academic attainment levels for Gypsy, Roma, and Traveller learners were highlighted as an area of concern. In 2025, all eight universities in Wales had collaborated to achieve [the Race Equality Charter Bronze award](#).

Patterns of participation vary significantly across ethnic groups. Compared to other groups, learners in the “Asian, Asian British or Asian Welsh” ethnic group achieved the highest results at all key GCSE grade thresholds in summer 2025 ([Qualifications Wales, 2025](#)). Between 2017/18 and 2024/25, learners from Asian backgrounds - particularly those from Bangladeshi backgrounds, showed the highest rates of progression from Year 11 to TE. In contrast, learners from Gypsy, Traveller or Irish Traveller backgrounds had the lowest progression rates. Among those who did progress, pathways differed markedly: for example, 92% of learners from Indian

backgrounds in 2022/23 studied at level 3, predominantly AS levels, while only 22% of Gypsy, Traveller or Irish Traveller learners did so. Learners from White or Mixed, Multiple ethnic groups, were more likely to enter vocational FE or work-based learning ([Medr, 2025](#)). There has been an upward trend over time in the proportion of applicants to WGLG (FE) reporting their ethnicity as Global Majority e.g. 21% in 2023/2024, up from 12% during 2016/17 indicating a more diverse student base.

Learners in further education, apprenticeships and community learning were more ethnically diverse than the Welsh population overall. Learners from Black backgrounds were more likely to be taking apprenticeships, further education or local authority community learning in 2024/2025 compared to learners from other ethnic backgrounds ([Medr, 2026](#)).

NEET rates differ across ethnic groups ^[see footnote 3]. In the three-year period ending September 2025, 14.3% of young White people were estimated to be NEET compared to 9.8% of young Black, Asian and Minority ethnic people ([Welsh Government, 2026](#)).

Similar to FE, there are increasing numbers of students from ethnic minority backgrounds participating in HE. However, despite increased ethnic diversity, persistent inequalities remain. Offer rates in HE are lower for Asian, Black, and Other ethnic groups than for White learners. Degree outcomes show long-standing disparities; between 2016/17 and 2023 /24, White students were consistently more likely to achieve a first-class honours degree than peers from other ethnic background, while Black students were the most likely to receive lower second class or third-class degrees ([Medr, 2025](#)).

4.3 Sex

Male under-representation in TE persists across Wales, the UK and Europe. The participation gap between males and females appears across most measures and has not narrowed in recent years; in some cases, it has widened. In summer 2025, GCSE attainment was higher for female learners compared to males across a number of

measures ([Welsh Government, 2025](#)). However, from 2018/19 to 2024/25 the [Capped 9 indicator](#) gap between males and females narrowed ([Welsh Government, 2025](#)).

Transition at age 16

A consistently higher proportion of females progress from Year 11 to TE, typically by two to three percentage points.

Sex differences vary depending on the type and level of post-16 provision:

- Females are more likely to study at level 3 compared to males; 71% of females studied at level 3 compared to 60% of males in 2022/23 ([Medr, 2025](#))
- Males are more likely to progress into vocational FE or work-based learning
- Subject choices differ by sex. In FE, apprenticeships and community learning, only 1 in 4 STEM qualifications are taken by female learners ([Medr, 2026](#)).
- Females were over-represented in their receipt of the WGLG in FE. Female survey respondents were also more likely than males to report progression to level 6 or 7 qualifications after receiving WGLG in FE ([Welsh Government, 2026](#))
- Female learners were slightly more likely to receive EMA, reflecting overall FE enrolment patterns
- Survey evidence shows females aged 16-19 in post-16 education report lower wellbeing scores than males and increased disruption to their education as a result. The wellbeing score gap between male and female respondents widened between 2020 and 2024 ([Welsh Government, 2024](#)).

Higher education

The male–female gap widens further at HE entry. In 2024, 23.4% of Welsh young men entered HE compared with 36.2% of young women ([UCAS, 2024](#)) and women remain more likely to participate in HE by age 30 ([Medr, 2025](#)) and more likely to achieve higher degrees.

Disadvantaged White young men are the least likely of any group to go to university, with barriers linked to lower prior attainment, higher rates of school exclusion, limited

role models, uncertainty about employment outcomes and financial concerns ([Welsh Government, 2026](#)).

However, gains in access and attainment for women do not yet translate to equity in progression, equal earnings or well-being: women remain underrepresented in many subjects and continue to experience labour market disadvantages despite higher educational attainment ([Welsh Government, 2026](#)).

4.4 Age

There are differences in the age at which learners engage with different TE sectors. In 2024/25, most learners in full-time FE were 16 or 17. Apprenticeships peak at 18, but there are many older learners. Part-time further education and local authority community learning is most commonly taken by learners in their 30s ([Medr, 2026](#)).

In HE, Wales has a higher proportion of mature (aged 21+) and part-time HE students than England in 2024/25 ([HESA, 2026](#)).

4.5. Disability and ALN/SEN

In 2002 the Welsh Government adopted the social model of disability, although most existing datasets continue to record disability based on the medical model. The [Disabled People's Rights Plan 2025 to 2035](#) was published in December 2025 and includes outcomes for education, income and employment.

Disability and participation rates

Disabled young people remain significantly more likely to be NEET than their non-disabled peers [see footnote 3]. In the three-year period ending September 2025, 18.0% of disabled 16-18 year-olds and 39.9% of disabled 19-24 year-olds were NEET ([Welsh Government, 2026](#)). Working-age disabled people were also more likely to have no qualifications than non-disabled people ([Welsh Government, 2025](#)).

Learners with SEN or ALN provision also have lower rates of progression from Year 11 to TE: in 2024/25, progression was five percentage points lower than for those with no SEN or ALN. Learners with SEN or ALN were more likely to progress to FE colleges

and less likely to study at level 3 (32%, compared with 73% of learners without SEN/ALN). They were also more likely to leave their TE programme without completing it.

Increased reporting of disability in TE

Rates of disability reporting in TE have risen. In further education, apprenticeships and community learning, 1 in 6 learners have a self-reported learning difficulty or disability, the most since these statistics began, with learner cohorts more diverse than the Welsh population ([Medr, 2026](#)). The rise may reflect higher disclosure rates and rising reports of mental health conditions. WGLG (FE) applications also show an upward trend in the proportion of applicants identifying as disabled.

The proportion of enrolments to HE from Welsh students known to have a disability has been steadily increasing; one in four enrolments in 2024/25 were from students with a known disability ([Medr, 2026](#)).

Disability and barriers to participation

Disabled learners face a range of barriers that affect participation, retention, and progression in TE.

32% of learners with ALN/SEN provision achieved GCSE grades at grade C/4 or above ([Qualifications Wales, 2025](#)).

Survey evidence shows that 16–19-year-old learners with neurodiversity can struggle with concentration, motivation, emotional regulation, and social challenges, which affect learning and wellbeing ([Welsh Government, 2024](#)).

I struggle with my concentration and have to take breaks every hour to keep productive, but often school don't accommodate for this." [Learner experiences in post16 education survey, 2024]

Disabled learners face accessibility barriers, a poorer student experience, and reduced labour market outcomes compared with non-disabled peers, with disabled students among the least satisfied student groups despite improvements in

institutional support ([Welsh Government, 2026](#)). The Diamond reforms provide support specifically for disabled learners in recognition of the additional barriers faced. Despite this, evidence from the evaluation of the Diamond reforms found that disabled learners report higher anxiety around living costs and uncertainty about support.

Some disabled learners found the WGLG (FE) application process inaccessible due to complex language or limited adjustments for ALN, dyslexia or other needs.

At a UK level, disabled students are more likely to defer HE entry because of delays in support being put in place. Separately, applicants to UCAS declaring a learning difference were more likely to come from the most advantaged backgrounds, implying systemic barriers disproportionately affect deprived disabled learners ([UCAS, 2022](#)).

Disability often co-occurs with mental ill-health, low qualifications, and socio-economic disadvantage, and more than 60% of NEET disabled young people have a mental-health condition.

Attendance-based rules for EMA and WGLG (FE) can disproportionately disadvantage disabled learners. Learning-centre staff highlighted the need for greater flexibility around attendance requirements and noted that current grant values do not always reflect the additional costs some disabled learners face.

Transport is a more significant barrier for disabled learners. Many disabled young people have lower confidence using public transport, feel less safe when travelling, or face physical inaccessibility, limiting participation in TE and access to enrichment opportunities such as internships.

Additional Learning Needs system and Post-16 education

As part of the formative evaluation of the ALN system, a practitioner survey explored experiences of implementing ALN reforms, including in post-16 settings ([Welsh Government, 2025](#)). Around half of respondents from FEIs and independent special post-16 institutions (ISPIs) agreed that transition arrangements from secondary school to FE maintained continuity of ALN provision. This was less positive than views on primary-to-secondary school transitions.

There were differing views between local authorities (LA) and FEIs/ISPIs on post-16 duties. LA respondents were less likely to report understanding their organisation's responsibilities and highlighted a lack of clear guidance. Workload, capacity, and resourcing were also noted as pressure points: only half of respondents felt they had sufficient time to prepare Individual Development Plans.

FEIs and ISPIs emphasised the need for continuous training to equip staff with the required knowledge and skills, with only a small minority having completed the National Professional Learning Pathway. Many respondents identified a need for further support on specific aspects of the ALN system.

Overall, FE respondents agreed that ALN identification processes were timely and that parents and carers were involved.

4.6 Welsh -speaking learners and participation through medium of Welsh

A key component of the Welsh Government's Welsh language strategy [Cymraeg 2050](#) is for engagement with the Welsh language to continue into TE, with a recognised need to further develop Welsh medium provision within the TE sector.

Welsh-medium FE provision is uneven; a higher proportion of Welsh medium and bilingual schools have a sixth form compared to English medium schools whilst FE colleges and work-based providers offer more limited opportunities. In HE, provision is largely concentrated in full-time undergraduate study.

Higher rates of progression to TE overall, to sixth form, and to level 3

Learners enrolled in Year 11 in Welsh-medium schools have consistently higher rates of progression to TE. Among those who progressed to TE in 2022/23, 54% of learners from Welsh-medium schools went to school sixth forms compared with 33% from English-medium schools ([Medr, 2025](#)).

Learners from Welsh-medium schools were also more likely to study at level 3 (76%) than learners from English-medium schools (64%).

Progression rates and destinations for learners in bilingual, and English-with-significant-Welsh schools follow broadly similar patterns, i.e. higher participation rates and at higher levels, relative to English-medium schools.

Participation through medium of Welsh

In recent years there has been an increase in learning through the medium of Welsh in apprenticeships and in full-time further education ([Medr, 2026](#)). This increase is almost entirely due to an increase in activities involving a “small amount” of Welsh-medium learning. There has also been a rise in fluent Welsh speakers taking activities with a ‘significant amount’ of Welsh-medium learning whilst the percentage of fluent Welsh speakers taking qualifications entirely in Welsh is at its lowest since 2017/18. ([Medr, 2026](#)).

For higher education, in recent years, enrolments for Welsh-medium credits have fallen, with uptake varying across subjects ([Medr, 2026](#)). Around 15% of Welsh-domiciled students receive at least some tuition through the medium of Welsh (Davies, Poole and Huxley, 2026).

Learners studying through the medium of Welsh in HE tend to have higher prior attainment and are more likely to come from less deprived backgrounds (Davies, Poole & Huxley, 2026, DI 4). Students with two Welsh-speaking parents are significantly more likely to choose Welsh-medium tuition and are the least likely to study outside Wales.

Regardless of where they study, fluent Welsh speakers are more likely to enter graduate-level employment in Wales six months after graduation, compared with those not fluent in Welsh (Poole, Davies and Huxley, 2026).

4.7 Care-experienced learners⁵

Care-experienced learners remain consistently under-represented across TE. Many Welsh Government financial support schemes, including WGLG (FE) and EMA contain

⁵ A learner who has been cared for or looked after by a Local Authority, including foster care or staying at a Children’s Home

no income-threshold requirements for this group, and the Education (Student Support) (Wales) Regulations 2018, based on the recommendations from the Diamond review, provide access to the maximum maintenance grant regardless of household income alongside targeted financial support.

UK-level analysis shows that care-experienced applicants often follow less linear and longer pathways into HE. They are more likely to apply as mature students, take Access to HE Diplomas, and progress at lower rates: only around 15% of those continuously in care enter HE by age 19, compared with 47% of their peers. They are also less likely to attend higher-tariff providers, more likely to have lower than average prior attainment, more likely to drop out, take longer to complete undergraduate study, and achieve lower degree classifications on average. Intersectionality compounds these challenges: care-experienced learners are more likely to be from disadvantaged areas, to be disabled, to report mental health conditions, to identify as LGBT+ and to be from Mixed or Black ethnic groups ([UCAS, 2022](#)).

Evidence from the Diamond reforms evaluation found that student loan debt feels riskier to care-experienced learners, who often lack financial safety nets and stability. Early findings from the [Basic Income Pilot evaluation](#) suggest it can help make HE a more viable option by providing security during key transitions, though some participants reported reduced motivation to engage in education or employment.

Care-experienced learners in HE often require tailored bursaries, accommodation guarantees, and specialised advisors for equal participation. In a 2024 survey of 16 to 19 year old learners in FE in Wales, care-experienced young people reported high mental health needs and disrupted education, contributing to low progression into FE/HE and reported that their original education plans had changed as a result of the pandemic at a much higher rate (65.4%) than the overall survey population (30.7%) ([Welsh Government, 2024](#))

Rich qualitative evidence from the [EMA review](#) highlights practical barriers. Care-experienced learners reported that the EMA application process can be difficult without access to documentation such as birth certificates or National Insurance

numbers. Many relied on personal advisers, caregivers, or specialist college staff for support, and inconsistencies in social workers' knowledge of EMA and student finance affected access.

Some learners reported that EMA helped them avoid withdrawing from education due to financial pressure, and allowed access to extracurricular opportunities, and a degree of independence alongside supporting basic needs. Strong consensus emerged that EMA should be paid directly to learners, particularly for those in care or living independently.

Care-experienced learners were slightly more likely than the wider EMA population to receive additional support such as free meals, free or subsidised transport, or college hardship support. As with ALN and disabled learners, there was a call for greater flexibility in attendance requirements to better reflect the challenges care-experienced learners face:

'It wasn't until six months into that course that I found out about EMA.' (Care experienced previous EMA recipient)

'Part-way through my course I moved into my own place. It definitely helped me pay for my water, and my gas and electric. One week's (EMA) was like a month or a month and a half of my water bill (Care experienced focus group participant, EMA review)

5. Key themes

System-level approach

A key theme emerging from the evidence is the importance of systems and sectors working well together. Participation barriers span multiple services and policies, requiring integrated, multi-sector solutions. The intersectional needs of learners, spanning mental wellbeing, transport, finance and ALN support, highlight that single-issue or narrowly designed interventions are often insufficient. Effective participation support requires coordinated action across tertiary education providers, local authorities, and national systems.

A wide range of evidence indicated that widening-access activity and financial support is most effective when financial, academic, and wellbeing support are delivered as a coherent package. Contributors to the Diamond reforms evaluation emphasised that financial aid alone often has limited impact on retention and success. Instead, wraparound support, combining financial aid with pastoral care, mentoring, tutoring, and clear communication is key.

“Money matters, but it’s never the full answer - belonging, belief, and relationships matter more.”

Many insights from the evidence workstream were generated through linked administrative data, demonstrating the value of a joined up analytical framework for timely and comprehensive understanding of learner pathways. Challenges with system-wide monitoring remain, underscoring the need for more integrated approaches to analysing learners experiences throughout the education system, spanning pre- and post-16 provision.

Inflationary pressures and rising cost of living

The impact of inflation and rising living costs emerged strongly across the evidence base. Parents and guardians contributing to the evaluation of the Diamond reforms described unprecedented financial pressures on learners and families, with student maintenance support no longer keeping pace with rising costs. Parents and guardians expressed concern about how their children would afford university life, noting that family contributions were increasingly necessary.

Fieldwork with stakeholders echoed these concerns. The current HE support system was frequently described as misaligned with present-day financial realities, particularly in relation to part-time provision. Providers reported that expanding flexible and part-time options is increasingly constrained by financial and operational pressures, with a funding model perceived as insufficient to meet higher delivery costs.

An evidence review of barriers to HE found the cost-of-living crisis affecting HE engagement, mental health, and academic performance. Many students now work

alongside study out of financial necessity, reflecting a shift in the nature of HE participation.

Across a range of evaluations into post-16 financial support, a common recommendation was to review long-standing, static household income thresholds, which have not kept pace with rising household incomes. This issue was highlighted in reviews of EMA, WGLG (FE), and student finance more broadly.

Worsening mental health among young people

Poor mental health and emotional wellbeing present a significant challenge for 16 to 24 year-olds in post-16 education in Wales, exacerbated by the COVID-19 pandemic. Mental ill-health affects transitions into FE and HE, attendance, attainment and overall retention in TE. This pattern is reflected across the UK, where mental health challenges among university students have reached unprecedented levels. (Cogan et al, 2025).

The impact varies across groups. Teenage girls and young women, young carers, care experienced learners, disabled learners and those with ALN, and learners from lower socioeconomic backgrounds are at higher risk. Poor mental health is also a major risk factor for becoming NEET ([National Centre for Social Research, 2023](#)).

Survey evidence from learners at FE providers shows that more than half of 16–19-year-olds had their learning disrupted by mental ill-health in the previous twelve months, and one in five needed support with mental health or emotional wellbeing. Although learners felt providers were trying to meet their needs, significant unmet demand remains. ([Welsh Government, 2024](#)).

Evidence suggests that financial pressures, attainment gaps, discrimination, and other structural barriers intersect with mental health challenges to affect participation. Stakeholders contributing to the Diamond reforms evaluation reported increased social anxiety following the pandemic, particularly concerns about leaving home, living independently, and managing academic workloads. Prospective learners increasingly seek information about mental health support, neurodiversity assessments, and

wellbeing services. Poor mental health also affects access to opportunities, including the ability to use public transport, highlighted in the Young Person's Guarantee evaluation ([Welsh Government, 2024](#)):

"They're not just worried about money; they're worried about coping." [Stakeholder, Diamond reform evaluation]

Place-based inequality shapes participation

The [Future of Tertiary Education in Wales](#) paper presented evidence on projected demographic change and the challenges this could present particularly in rural areas.

At present, the differences in participation between schools and local authorities often exceed differences between demographic groups and due to attainment, demonstrating how place-based inequality shapes access to TE. Socio-economic disadvantage varies significantly across Wales ([Welsh Government, 2025](#)), influencing educational outcomes and participation patterns. This will be further explored in upcoming ADR Wales data linkage work (publishing Spring 2026).

TE provision is unevenly distributed across Wales. While HEIs and FE colleges have consolidated and expanded through satellite campuses, learners in some areas still travel long distances to access particular types of provision. This uneven distribution, combined with limited connectivity, restricts subject choice and pathway flexibility, particularly for rural learners.

Transport and funding arrangements also vary widely. For example, some FEIs use discretionary funds such as the Financial Contingency Fund (FCF) to provide free transport, while the EMA review found that 27% of recipients accessed free college transport and 49% used EMA to cover transport costs. These variations create inconsistent experiences for learners across local areas ([Welsh Government, 2024](#)).

Evidence from 14–25-year-olds in rural Wales shows that 81% expect to leave their local area for education, training or employment, reflecting limited local provision and transport barriers ([Woods and Utz, 2022](#)). Poor connectivity, long distances, limited

public transport routes, and misalignment between course timetables and transport schedules, further constrains access.

Data gaps also affect understanding of place-based inequality. For example, learners from border areas who cross into England for FE are not captured in Welsh administrative datasets, and some surveys over-represent urban learners, leaving gaps for rural counties such as Gwynedd ([Welsh Government, 2024](#)).

6. Gaps in the evidence and limitations

Impact of COVID-19 pandemic

The COVID-19 pandemic created major breaks in education data series in Wales. School closures, changes to assessment arrangements and the suspension of statutory collections disrupted the continuity and comparability of key datasets. As a result, trends spanning the pandemic period should be interpreted cautiously, as observed changes may reflect temporary disruption rather than longer-term patterns. This is particularly relevant to attendance, attainment, and progression measures.

Equalities data

Inconsistencies in how protected characteristics are recorded across education datasets, and across UK nations, limit the ability to analyse how demographics intersect with post16 pathways. Disability, for example, is variously captured using different definitions of disability, whilst the PLASC records ALN (and previously SEN status) and not disability, with the transition to the ALNET system also driving changes to ALN recording.

Whilst HESA data shows variation in participation across ethnic groups, [changes in ethnicity categories](#) over time and incomplete data restrict the robustness of any conclusions ([Welsh Government, 2026](#)).

Voluntary equalities forms further reduce data completeness; only around half of applicants to the Student Loan Company and to the WGLG (FE) typically provide equalities information about whether they identify as having a

disability and their ethnicity. This restricts meaningful analysis of participation, outcomes, and intersectionality.

Fragmented datasets

The structure of post-16 datasets limits the ability to form a holistic view of TE participation. UCAS data covers full-time HE applicants only and excludes direct-to-institution HE applicants, which are more common among mature learners and in specific subjects. A full picture of HE participation requires triangulation with HESA enrolment data.

There are inconsistencies in measures of individuals' Welsh language ability across the tertiary education sector. Further analysis is recommended to improve understanding and interpretation of education data relating to the Welsh language. The Welsh Language and Education (Wales) Act 2025 seeks to ensure that, in future, all children in Wales have the opportunity to become independent Welsh speakers through the education system. The Act also introduces a new framework for describing Welsh language skills, based on the Common European Framework of Reference for Languages (CEFR). This has the potential to provide a more consistent way for individuals to identify and describe where they are on their Welsh language learning journey.

Data gaps in border regions, where learners crossing into England for FE are not captured in Welsh datasets, leading to an underestimation of progression rates in affected counties.

Lack of long-term monitoring of outcomes

There remains limited evidence on the long-term outcomes of financial support in TE. Several reviews highlighting a "paucity of data" on long-term outcomes, with much of the evidence on widening participation relying on perceived rather than measured impact. Robust evidence on enrolment, completion, or longer-term outcome is limited. Embedding outcomes-based measurement frameworks at the programme design stage would strengthen the future evidence base.

Attribution also presents a consistent challenge. Learners typically experience multiple, overlapping interventions, making it difficult to isolate the effects of any single support package. For example, in the EMA review, outcomes could not be disentangled from other statutory and discretionary support available to 16–18-year-olds, as many EMA recipients simultaneously received FCF, FSM or subsidised food, and free or subsidised transport provided either by local authorities, TEIs, or via the FCF.

Evidence gap on non-participants

Learner voice is central to understanding participation, but it is difficult to engage those who do not continue into post-16 education, particularly former learners not currently accessing services, leaving a significant evidence gap.

7. Implications and future directions

The comprehensive body of evidence synthesised in this report provides detailed insights on the trends and underlying challenges affecting participation in TE specific to the context and education landscape in Wales, along with evidence on what is working well to support learners to engage in post-16 education.

The findings reinforce that participation cannot be understood solely through enrolment figures; learners' experiences, pathways, and outcomes across the system are equally important. Improving participation will require not only widening access but also supporting a more diverse cohort to remain in learning, achieve higher level qualifications, and progress into further study or employment.

Persistent participation and attainment gaps, combined with evidence that financial support is most effective when paired with academic, pastoral, and/or wellbeing support, indicate a need for a more systems-level approach. Barriers rarely occur in isolation and often are inextricably linked and compound, meaning a coherent, multi-agency approach is required.

Evidence also suggests learners do not feel well-informed about TE pathways or available financial support. Earlier, clearer, and more accessible information would

help learners and families navigate choices and reduce misconceptions around cost, debt, and eligibility. In particular, there is a need for more readily accessible and tailored information for learners who are care experienced, disabled or experiencing socioeconomic disadvantage.

The findings point to a changing landscape of participation: more learners are balancing work alongside study, require flexible learning options, and face greater socioeconomic and health pressures. These trends need to be carefully considered alongside wider financial and economic constraints and sector sustainability, as they have implications for support models, delivery structures, and policy priorities.

A number of evidence gaps remain. Strengthening and formalising data analysis, monitoring and evaluation systems, particularly long-term, outcomes-based approaches, would enable better tracking of learner trajectories and improve understanding of what interventions are most effective. Finally, as further analytical outputs from the evidence workstream are published, the evidence base will continue to deepen, supporting future decision-making across the tertiary system.

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