

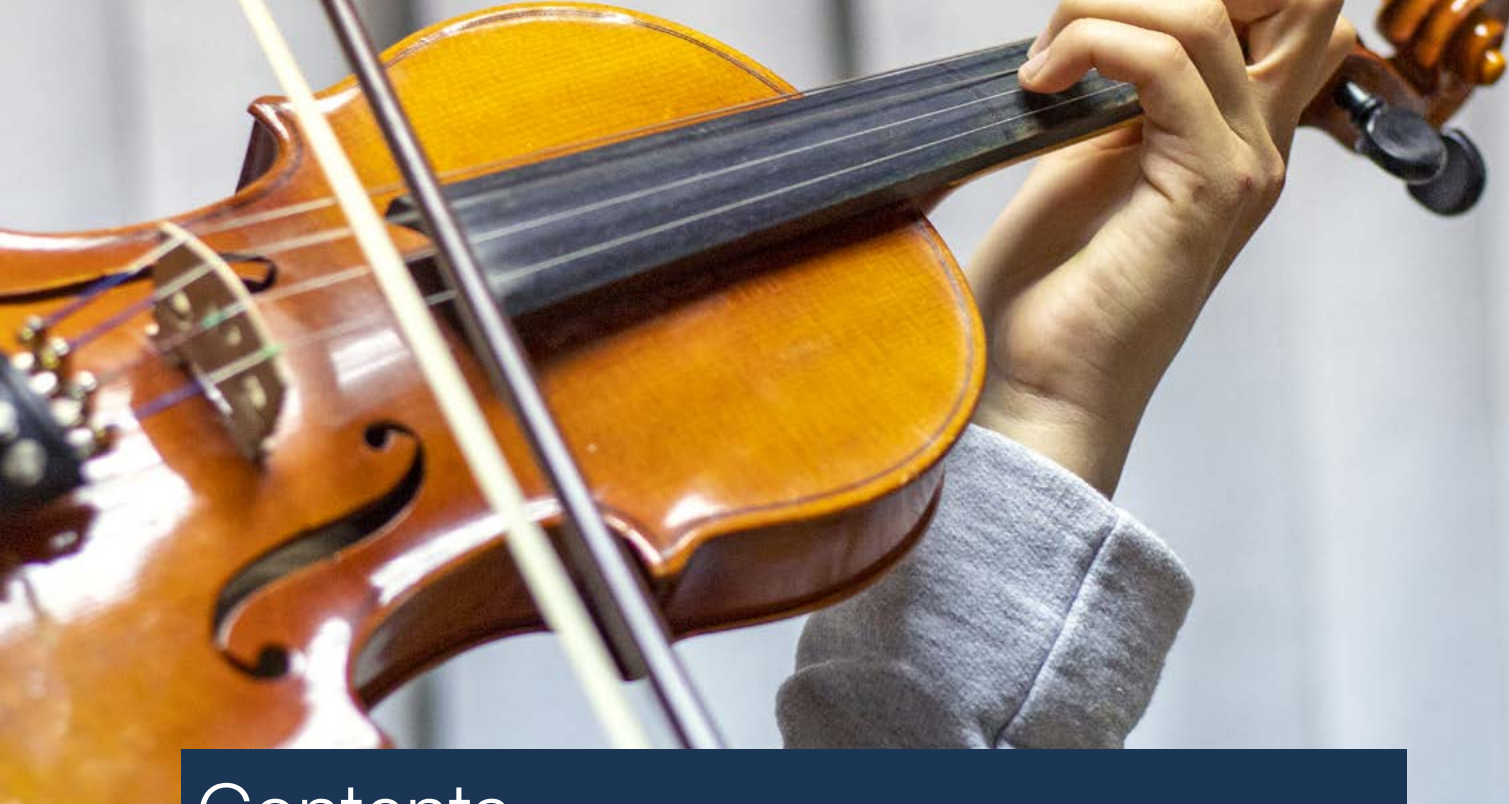
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# Instrumental Music Services

## Results from the IMS Survey 2020





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# Introduction

This report details results from the 2020 National Instrumental Music Survey in Scotland. The survey has now run for eight consecutive years since 2012 and shares information about instrumental music services (IMS) across Scotland including: tuition fees, concessionary rates, instrument hire and loan policies, pupil numbers, cost of services, instructor numbers and additional activities. Each year the survey is carried out by the Improvement Service on behalf of Heads of Instrumental Teaching Scotland (HITS) as a means of sharing a national picture of instrumental music services and best practice within these services.

The 2020 survey was issued to HITS colleagues in March 2020 and presents results relating to the 2019/20 academic year, unless otherwise stated. Comparisons with previous years' surveys are made where applicable. All 32 local authorities responded to the survey. Not all local authorities were able to provide responses for all sections of the survey, so care should be taken when comparing results with previous years. In addition, some figures are estimates and subject to change. Further details of all data presented in the report is available in the appended summary tables.

Instrumental music is a discretionary service provided by all local authorities in Scotland and is separate to the music curriculum taught within the classroom. This survey concentrates solely on these discretionary services, outwith Youth Music Initiative (YMI) funded tuition, and the music curriculum.

The outbreak of Covid-19 in Scotland and lockdown from March has had a major impact on instrumental music services. Schools were closed in late March of 2020, meaning that lessons could not be delivered as usual during the last term of the school year. Models of delivering lessons have changed in many cases, with lessons delivered online in the final term of 2019/20, a practice that has continued in some areas in the

current academic year. These changes have had knock on affects on the fees that are charged for lessons and the income and costs associated with delivering IMS. These changes are discussed throughout this report where appropriate.



## Charging Policies

Local authorities were asked to provide details of the charges for a full year of tuition for the academic year 2019/20 and any proposed changes due to take place in the 2020/21 academic year. Instrumental music tuition fees vary widely across Scotland, but overall figures provided for the 2019/20 academic year demonstrated little change in planned annual fees compared to previous years. For the current academic year, 2020/21, just 4 local authorities, or 12.5%, increased fees for group lessons, a comparatively lower percentage than in any previous iteration of this survey. All 4 of these local authorities increased fees by 3% of the previous year's tuition fee, ranging from £4 to £9 in cash terms over the academic year. Several local authorities have reduced or waived part of their fees for 2020/21 due to Covid-19 and the uncertainty this has caused around incomes, school closures, and the method of delivery for lessons going forward. In addition, 2019/20 fees reported here do not take into account refunds of fees as a result of school closures at the end of the academic year. In practice fees for 2019/20 were often lower than displayed here as they did not cover the full academic year. As in last year's survey, no local authorities introduced fees where previously tuition had been free of charge. Fees for 2020/21 range from £124 up to £524, as displayed in Table 1. In several local authorities final fees for 2020/21 are suspended or yet to be confirmed at the time of writing.

Amongst local authorities where fees were charged, these averaged £236.46 for group lessons in 2020/21, a decrease of £2.65 or 1.1% since the previous year. As mentioned, this reflects the small number of local authorities that have increased fees and in many cases the decision to suspend or reduce fees as a result of Covid-19. There were changes to charges in seven local authorities, these were:

- **Argyll and Bute** increased fees by £7.11 (3%) to £254.58 per academic year.
- **East Lothian** increased fees by £8.40 (3%) to £288.40 per academic year.

- **Inverclyde** increased fees by £4 (3%) to £124 per academic year.
- **North Ayrshire** suspended all fees for term 1 to support parents affected by the Covid-19 crisis, this reduced fees by £66 to £132.
- **South Ayrshire** suspended all fees for the first term to support parents affected by the Covid-19 crisis, this reduced fees by £50 to £150.
- **Stirling** increased fees by £9 (3%) to £285 per academic year.

In addition, three local authorities indicated that fees for 2020/21 are currently under review:

- In **Aberdeenshire** in March 2020 fees were suspended and placed under review as a result of Covid-19. There has been no change in that position at the time of writing.
- **Fife** have suspended fees for term 1 at the time of writing.
- **Midlothian** will not charge for the first term, with a reduced fee to apply from term 2.
- Fees in **North Lanarkshire** are under review, the current level is £150.

Table 1 - Instrumental Music Tuition Charges 2012-2020 - all charges are for group lessons unless stated

Council	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Clackmannanshire	£220.00	£222.00	£228.00	£230.00	£235.00	£258.50	£524.00	£524.00	£524.00
West Lothian	No charge	No charge	No charge	No charge	No charge	No charge	£354.00	£354.00	£354.00
Highland	£252.00	£252.00	£264.00	£264.00	£290.40	£318.00	£318.00	£318.00	£318.00
East Renfrewshire	£160.00	£180.00	£200.00	£250.00	£300.00	£300.00	£300.00	£300.00	£300.00
Perth & Kinross	£245.85	£245.85	£245.85	£245.85	£245.85	£245.85	£295.00	£295.00	£295.00
Moray	£201 group, £300 individual	£201 group, £300 individual	£210 group, £300 individual	£210 group, £300 individual	£252 group, £360 individual	£264.60 group, £378 individual	£264 group, £378 individual	£291 group, £415.80 individual	£291 group, £415.80 individual
East Lothian	No charge	No charge	No charge	No charge	No charge	No charge	£280.00	£280.00	£288.40
Stirling	£189 group, £309 individual	£189 group, £309 individual	£240 group (no individual lessons)	£246.00	£252.00	£258.00	£267.00	£276.00	£285.00
Argyll & Bute	£138.00	£142.15	£146.40	£150.80	£226.20	£232.98	£239.97	£247.74	£254.58
Aberdeen City	£272 group, £340 individual	£272 group, £340 individual	£272 group, £340 individual	£272 group, £340 individual	£272 group, £340 individual	£272 group, £340 individual	£272 group, £340 Individual	£242 group, £280 paired, £400 individual	£242 group, £280 paired, £400 individual
Angus	£183.00	£192.00	£201 + £30 hire	£210 + £30 hire	£231 + £30 hire	£231 + £30 hire	£231.00	£231.00	£231.00
East Dunbartonshire	£140.00	£140.00	£160.00	£160.00	£165.00	£170.00	£230.00	£230.00	£230.00
Aberdeenshire	£192 group, £284 individual	£196 group, £292 individual	£200 group, £300 individual	£204 group, £304 individual	£208 group, £308 individual	£212 group, £316 individual	£220 group, £328 individual	£220 group, £328 individual	Fees are currently suspended and under review

Council	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
South Lanarkshire	£180 (£60 per lesson block)	£180 (£60 per lesson block)	£180 (£60 per lesson block)	£210.00	£210.00	£210.00	£210.00	£216.00	£216.00
Midlothian	£150.00	£160.00	£168.00	£84.00	No charge	No charge	£205.50	£215.34	No charge for term 1, reduced charges (TBC) will run from term 2.
Dumfries & Galloway	£130 + £47.15 hire	No charge, £47.15 hire	No charge, £47.15 hire	No charge, £47.15 hire	£200 + £49 hire	£200 + £49.50 hire	£200.00	£200.00	£200.00
East Ayrshire	£100 group, £150 individual	£100 group, £150 individual	£150.00	£180.00	£180.00	£180.00	£180.00	£180.00	£180.00
Falkirk	£44.40 group, £178.20 individual + £20.40 hire	£140.00	£140.00	£140.00	£156.00	£156.00	£154.00	£160.00	£160.00
Shetland Islands	£140.00	£140.00	£160.00	£129 group, £172 individual	£135 group, £180 individual	£140 group, £190 individual	£150 group, £200 individual	£160 group, £160 remote/blended teaching, £210 individual	£160.00 based on remote charges
North Lanarkshire	£150.00	£150.00	£150.00	£150.00	£150.00	£150.00	£150.00	£150.00	£150.00
Scottish Borders	£125.00	£125.00	£125.00	£125.00	£132.00	£140.00	£140.00	£150.00	£150.00
South Ayrshire	No charge	No charge	No charge	No charge	No charge	No charge	£200.00	£200.00	£150.00 – no fees were charged in term 1 reducing the cost from £200



Council	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
North Ayrshire	£120.00	£140.00	£160.00	£180.00	£180.00	£180.00	£198.00	£198.00	£132.00 – no fees were charged in term 1 reducing the cost from £198
Inverclyde	£95.50	£98.00	£100.00	£110.00	£114.00	£117.00	£117.00	£120.00	£124.00
Fife	£125.00	£125.00	£125.00	£140.00	£180.00	£220.00	£220.00	£220.00	£220 n.b. this has been suspended in term 1
Eilean Siar	No charges for lessons in Wind, Brass, Gaelic Singing or Piping. In the 2016/17 sessions pupils were charged for fiddle and guitar lessons in the Nicolson including those sitting SQA exams on those instruments. Charges for these lessons were set at £12.50 per lesson.	£0.00	£0.00	£0.00	£0.00	£0.00	No charges except for non-SQA guitar and strings pupils. For these instruments a fee of £12.50 per lesson applies – for a minimum of 30 weeks of lessons this would cost £375 per year.	No charges except for non-SQA guitar and strings pupils. For these instruments a fee of £12.50 per lesson applies – for a minimum of 30 weeks of lessons this would cost £375 per year.	No charge, with exception of strings and guitar at secondary school level. These instruments are charged at £400 p.a. for 32 lessons

Council	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Eilean Siar cont.	There are an average of 32 lessons per year, costing £400 pupil per year. Group lessons were £200 per pupil per year.								
West Dunbartonshire	No charge	No charge	No charge	No charge	No charge	No charge	No charge (£85 instrument hire)	No charge (£100 instrument hire)	No charge (£100 instrument hire charge)
Dundee City	£132 + £83 hire	No charge, £83 hire	No charge, £83 hire	No charge, £83 hire	No charge, £83 hire	No charge, £83 hire	No charge, £85 hire	No charge	No charge
Edinburgh, City of	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge
Glasgow	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge
Orkney Islands	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge
Renfrewshire	£150.00	£150.00	£150.00	£150.00	£150.00	No charge	No charge	No charge	No charge

Instrumental music services across Scotland normally provide instruments to pupils for hire or loan, with variation amongst local authorities as to the policies and charges for these instruments. In some cases, instruments are loaned at no cost, or included as part of the tuition cost. The majority of local authorities offered free instrument hire or loans for a certain period of time. In many cases pupils will then be encouraged to buy their own instrument where possible. There were also some exceptions where fees were charged only for certain instruments. Four local authorities offered instrument hire at an additional cost in 2019/20. As in previous years, Angus charged a £30 annual fee for instrument hire, which is waived for fee exempt pupils and SQA music pupils sitting an exam. In addition, any pupils taking lessons in percussion or piano are not charged for instrument hire. West Dunbartonshire charge £100 for any instrument for a period of one year, with a 50% discount for any further instruments and full exemptions for pupils in receipt of free school meals or studying for an SQA exam. Aberdeen City also charge a fee of £85 for any instrument per academic year. This fee is waived for pupils registered for free school meals or studying for an SQA exam in music. Scottish Borders charged a £82 annual hire fee for any SQA pupils who did not have their own instrument. This was an increase from £78 in 2018/19, however instrument hire is included within the cost of lessons for other pupils. Some additional examples of the policies for instrument hire include:

- **Argyll and Bute** do not have a hiring policy but do offer free instruments for one year.
- **Clackmannanshire** provide instrument hire as part of their tuition fee in any instrument.
- **East Dunbartonshire** loan instruments to beginners where required, but do not offer a hire scheme.
- **East Lothian** do not offer a hire scheme but offer a 2-year instrument loan free of charge. After this two-year period pupils are then required to hire or purchase an instrument through a Council approved supplier.
- **East Renfrewshire** offer all Monday to Friday pupils free instrument loan for two terms and they are then encouraged to purchase their own instrument. Larger instruments are offered to pupils for longer term loans on the understanding that the pupils will participate in authority ensembles when at the required standard.
- **North Lanarkshire** does not offer a hire scheme but does provide larger, more expensive instruments to pupils.
- **Stirling** offers instruments for hire for a limited number of years and pupils are then expected to provide their own. More expensive instruments are provided for the duration of tuition. No pupil is excluded from tuition on the basis of being unable to provide an instrument.
- **South Lanarkshire** do not offer a hire or loan scheme meaning that pupils must pay for their own instruments, but some larger, more expensive instruments can be used free of charge, including: oboes, bassoons, baritone saxophones, tubas, trombones, drum kits, timpani and large orchestral percussion instruments.

Other local authorities also have exceptions for certain, primarily larger, instruments, for example:

- **Dumfries and Galloway** do not offer free instrument hire for drums and guitars.
- High Life **Highland** offer free instrument hire but do not supply drumkits or orchestral percussion.
- **Moray** offer free instrument hire except for percussion instruments; however, drumsticks will now be offered for loan.

Some local authorities offer support to purchase an instrument, for example:

- **Perth and Kinross** offers an instrument purchase scheme where pupils can purchase an instrument free of VAT.
- **Eilean Siar** offer an Assisted Instrument Purchase Scheme and parents are advised regarding this by their child's teacher

Instrument hire, as with tuition fees, has a range of applicable concessions, for example for pupils entitled to Free School Meals, which will be discussed in the section below.

In addition to regular tuition, instrumental music services across the country also offer a range of additional activities that pupils can participate in. These activities include groups, bands and ensembles which offer pupils the opportunity to play their instruments in a group setting, often with the opportunity to participate in concerts. These activities often do not incur any additional charge and are run through subsidy from the local authority, with IMS staff often volunteering or working overtime to run these activities. In 17 local authorities all or part of the cost of these activities is passed on to pupils. Some local authorities also offer residential courses or trips for groups that incur a higher cost which cannot be covered by the IMS alone. In 2019/20 approximately 16,460 pupils participated in various additional activities across Scotland, although not all local authorities could provide exact details for the number taking part. This equates to roughly 29% of all IMS pupils in 2019/20, roughly equivalent to previous years. In the coming academic year these additional activities are likely to be heavily impacted by Covid-19 restrictions with many activities unable to run as normal. Further details about additional activities can be found in the appended summary tables.





# Concessions

All 25 local authorities who charged for instrumental music lessons in 2019/20 also offered some form of concession. Full exemption from fees is offered to SQA pupils, that is pupils taking a national qualification in music, in all of these local authorities and some form of exemption is also offered for families with low incomes. All local authorities use free school meal (FSM) entitlement or receipt of equivalent benefits<sup>1</sup> as criteria for low income and offered full exemptions to these pupils in 2019/20.

These exemptions are in line with COSLA's 'Instrumental Music Tuition Guidance 2019'.

In addition to the above exemptions, several local authorities have further concession rates for low income families beyond FSM entitlement:

- **Clackmannanshire** - A concessionary rate of £117.50 (roughly 77% reduction) is available to pupils whose household is in receipt of housing benefit, income support, or universal credit, but do not qualify for FSM.
- **East Lothian** - 30% reduction on fees for pupils from households with a taxable income of less than £26,884. In 2020/21 this will reduce fees to £201.88 for first children and £173.04 for any subsequent siblings.
- **Inverclyde** - Full exemption for pupils whose parents are in receipt of state benefits.
- **Midlothian** - 100 bursaries covering 100% of fees are provided to pupils from households with a joint income below the Education Maintenance Allowance income criteria (£24,421 p.a. before tax for households with one dependent child

<sup>1</sup> Parents or 16-18 year olds in receipt of income-based Employment and Support Allowance; income-based Job Seeker's Allowance; Income Support; Child Tax Credit, but not Working Tax Credit (with annual income of less than £16,105); Child Tax Credit and Working Tax Credit (with an annual income of up to £7330); Universal Credit (where monthly income is not more than £610); or support under Part IV of the Immigration and Asylum Act 1999

and £26,884 p.a. for households with more than one dependent child).

- **Perth and Kinross** - Full exemption to pupils new to the Instrumental Music Service who are not eligible for FSM, but are in receipt of an occupied council tax reduction based on household income.
- **Stirling** – Families in receipt of Council Tax Reduction or Benefit, Education Maintenance Allowance, and Universal Credit where income is below £1350 per month pay a discounted fee of £204.
- Several councils offer exemptions for pupils in receipt or eligible for a School Clothing Grant. These include **Dumfries and Galloway; East Ayrshire; Falkirk; Inverclyde; North Lanarkshire; Scottish Borders; Shetland Islands; Stirling;** and **West Lothian**.

In some local authorities fees for the previous academic year were reduced or refunded as lessons were cancelled or moved online, while fees for the current academic year 2020/21 have been reduced or partially waived in order to help families cope with the financial implications of Covid-19. In Midlothian, fees for the final term in 2019/20 were refunded, with no fees charged in the first term of 2020/21 and a reduced fee to be charged from term 2. In South Ayrshire, a decision was made to remove fees for term 1 of 2020/21 reducing the annual cost from £200 to £150. Similarly, in North Ayrshire fees were also removed for the first term, which has reduced the costs from £198 to £132. In Fife, at the time of writing the annual fee of £220 has been suspended during term 1, with a decision on fees to be made by the Council as to when lessons will begin to be charged. Fees in Aberdeenshire are similarly suspended and are under review for session 2020/21.

Additional concession rates are also offered in a number of local authorities. The most common concession type is sibling discount which is provided in fourteen local authorities. The discount applied varies, for example:

- **Aberdeen City** – where more than one child is learning an instrument from a single family a 50% discount applies to lesson fees for the second child and any subsequent siblings
- **Aberdeenshire** - 20% sibling discount.
- **Angus** – A second child receives a 20% discount (£184.80), third and subsequent children receive a 40% discount (£138.60).
- **Argyll and Bute** - £15 discount for siblings.
- **Dumfries and Galloway, Scottish Borders** - Full exemption for third sibling and subsequent siblings.
- **East Ayrshire** - 50% discount (£90) for a second child where the first child is paying £180, full exemption for the third child and subsequent siblings where the second child pays £90.
- **East Dunbartonshire, North Ayrshire, North Lanarkshire, West Lothian** – 50% sibling discount.

- **East Lothian** - a discount is applied for siblings where the full fee is paid for the eldest child reducing the fee to £247.20 from £288.40. Where a concession applies to the eldest child the fee is reduced to £173.04 from £201.88.
- **East Renfrewshire** – 25% sibling discount.
- **South Ayrshire** – 50% (£100) discount for second children and full exemption for third children

Other concessions:

- **Argyll and Bute** – 50% subsidy from Argyll Piping Trust and Kintyre Piping Trust.
- **East Ayrshire** – No fees are charged for Highland Drumming or bagpipe lessons.
- **Inverclyde** – Primary School pupils are not charged for lessons.
- **North Ayrshire, East Lothian, Shetland Islands** - Full exemption of fees for children looked after by the Council.
- **North Lanarkshire** – Full exemption of fees for children with additional support needs, and second instruments are charged at 50%.
- **Shetland Islands** – Pupils receive their first term of tuition free of charge.
- **Scottish Borders** – New starts with the service are offered a £100 discount on fees for their first year.
- **South Lanarkshire** - Full exemption for P5 instrumental music tuition pupils.

## Percentage of IMS pupils receiving concessions/exemptions

In 2019/20 a total of 56,198 pupils participated in local authority provided instrumental music tuition. Of these pupils, at least 13,283 received concessions/exemptions from tuition fees, not including those local authorities where no tuition is charged. Amongst the 25 local authorities who charge fees this amounted to 35.6% of all IMS pupils. Within individual local authorities, where data is available, the proportion receiving concessions/exemptions ranges from 11% to 78%. The most common type of exemption amongst local authorities is exemptions for SQA music pupils, which made up the majority of all concession types in most local authorities. Exceptions were Angus, Fife, Highland, and West Lothian where free school meal or benefits exemptions made up the largest group of concessions. Sibling discounts were the most common concession in Aberdeenshire and Aberdeen City Councils. West Dunbartonshire did not charge for tuition but offered free instrument hire to pupils receiving free school meals or studying for SQA exams.

Table 2 displays the number and proportion of all IMS pupils who received concessions or exemptions in 2019/20. The table also displays the total number of pupils who received instrumental music lessons at some point during the 2019/20 academic year in each local authority. These figures include pupils who received lessons in music centres if these lessons were part of the core service, but do not account for other pupils who took part in additional activities.

**Table 2 - Number of IMS pupils who received concessions/exemptions – n.b. Councils that do not charge are excluded**

	No. IMS pupils 2019/20	No. of IMS pupils who received concessions/ exemptions in 2019/20	Total no. and % of IMS pupils who received concessions/ exemptions 2019/20
Aberdeen City	2224	179 SQA Music Pupils 168 FSM 220 Sibling Discount	567 (25%)
Aberdeenshire	2888	412 SQA Music Pupils 150 FSM 505 Sibling Discount	1067 (37%)
Angus	1052	143 Benefits 85 SQA Music Pupils 70 Sibling Discount	298 (28%)
Argyll & Bute	1017	54 FSM	521 (51%)
Clackmannanshire	299	117 SQA Music Pupils 39 FSM	156 (52%)
Dumfries & Galloway	735	188 SQA Music Pupils 91 FSM/Clothing Grant	279 (38%)
East Ayrshire	976	145 SQA Music Pupils 128 FSM 58 Sibling Discount	331 (34%)
East Dunbartonshire	1147	165 SQA Music Pupils 61 FSM 115 Sibling Discount	341 (30%)
East Lothian	1022	131 SQA Music Pupils 59 FSM/Clothing Grant 77 Sibling Discount	271 (27%)
East Renfrewshire	1648	313 SQA Music Pupils 80 FSM 156 Sibling Discount	549 (33%)
Falkirk	1852	99 FSM	364 (20%)
Fife	3232	309 SQA Music Pupils 571 FSM (55 both FSM and SQA)	880 (27%)
Highland	3700	240 SQA Music Pupils 420 FSM/ Benefit 74 other special discretionary exemption	734 (20%)
Inverclyde	1326	190 SQA Music Pupils 428 Triallists 351 Primary 63 FSM/ Other Exemption	253 (19%) (excluding 428 triallists and 351 Primary School pupils)
Midlothian	924	164 SQA Music Pupils 69 FSM 52 Bursaries	285 (31%)



	No. IMS pupils 2019/20	No. of IMS pupils who received concessions/ exemptions in 2019/20	Total no. and % of IMS pupils who received concessions/ exemptions 2019/20
<b>Moray</b>	643	52 SQA Music Pupils 50 FSM	122 (19%)
<b>North Ayrshire</b>	1184	260 FSM	491 (41%)
<b>North Lanarkshire</b>	2437	642 SQA Music Pupils 365 FSM/CG 49 Sibling Discount 59 ASN 29 Second Instrument 377 1-year YMI	1144 (47%) (excluding 377 YMI)
<b>Perth &amp; Kinross</b>	1359	100 SQA Music Pupils 50 FSM/ Income Support	150 (11%)
<b>Scottish Borders</b>	848	129 SQA Music Pupils 59 FSM 24 School Clothing Grant 3 Sibling Discount	216 (25%)
<b>Shetland Islands</b>	712	85 SQA Music Pupils 52 FSM/CG	137 (19%)
<b>South Ayrshire</b>	1125	134 SQA Music Pupils S4-S6 57 SQA Music Pupils S3 115 FSM 62 Sibling Discount 8 Additional Support From IMS	350 (31%)
<b>South Lanarkshire</b>	2850	1400 SQA Music Pupils 60 FSM 500 P5 Exemptions (YMI)	1460 (51%) (excluding 500 Primary 5 YMI pupils)
<b>Stirling</b>	989	215 SQA Music Pupils 45 FSM/CG 27 Other Qualifying Benefit	287 (29%)
<b>West Lothian</b>	1131	127 SQA Music Pupils 131 FSM/CG 116 Sibling Discount	374 (33%)

## Free School Meal Entitlement (FSM)

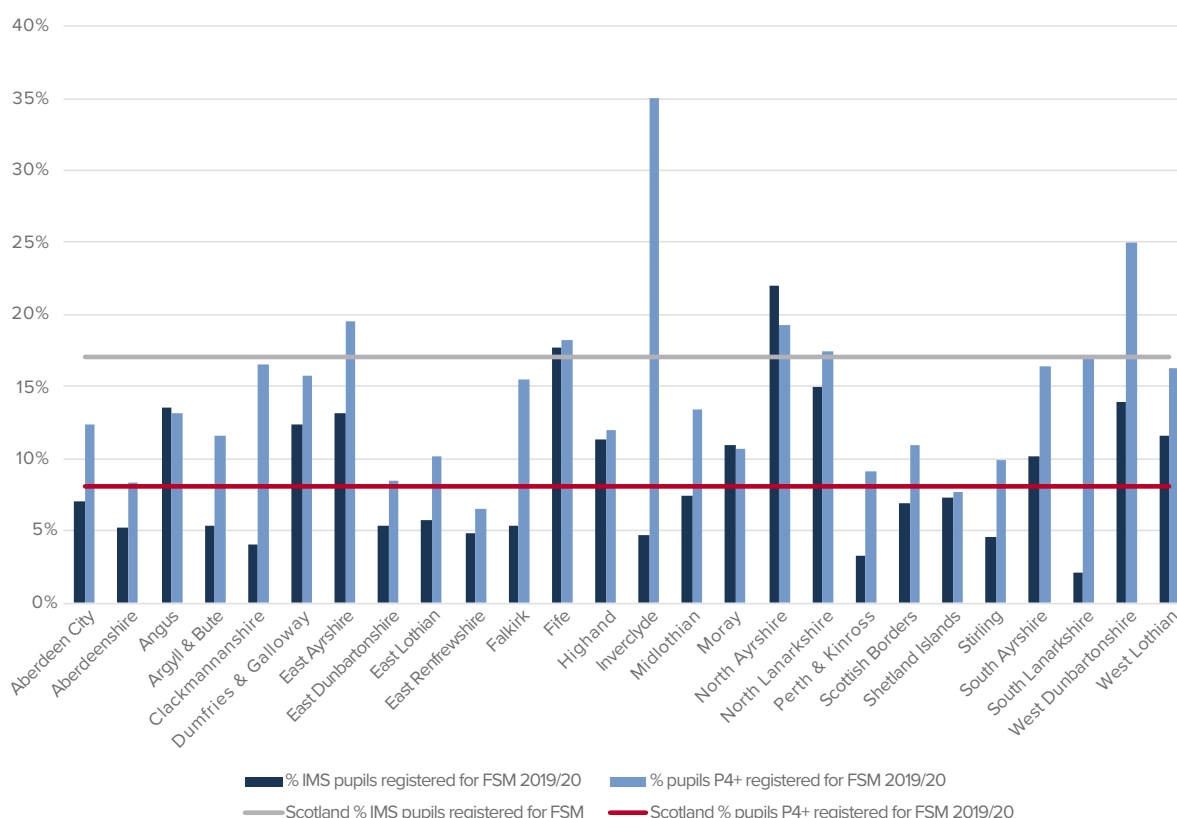
Free School Meals (FSM) are offered across Scotland to pupils in Primary 4 onwards whose families are in receipt of a range of qualifying benefits. According to the 2019 Pupil Census, the total number of P4+ pupils registered for Free School Meals was 89,213, equating to 17.1% of the total P4+ pupil roll. Within instrumental music services across Scotland there were 3101 pupils who were registered for FSM, roughly 6% of all IMS pupils and 8.1% of IMS pupils within local authorities who provided FSM data. Both figures would suggest that pupils registered for FSM are underrepresented within IMS services in comparison to the overall school population. It should be noted that not all instrumental music services hold accurate records of the number of FSM pupils using

the service. This is influenced by a variety of factors. For example, some services that have no tuition fees do not need to record these details for concession purposes, and in those services where tuition fees are in place, pupils may already be exempt through another concession policy and therefore FSM eligibility is not recorded.

Amongst the local authorities where FSM registration figures have been provided, the proportion of IMS pupils who are registered for FSM ranges from 2% to 22%. The representation of FSM pupils within instrumental music services varies between councils, as can be seen in Figure 1 which shows the proportion of IMS pupils registered for FSM compared with the total number of pupils P4+ registered for FSM within the local authority. Again, however, given the lack of available data for certain local authorities, these figures should be treated with caution and do not necessarily represent all IMS pupils registered for FSM.

In this year's survey local authorities were asked to estimate the proportion of pupils undertaking instrumental music tuition and claiming FSM as a proportion of all pupils eligible for tuition. Proportions ranged from 1% to 18%. Full details are included within the appended Summary Tables.

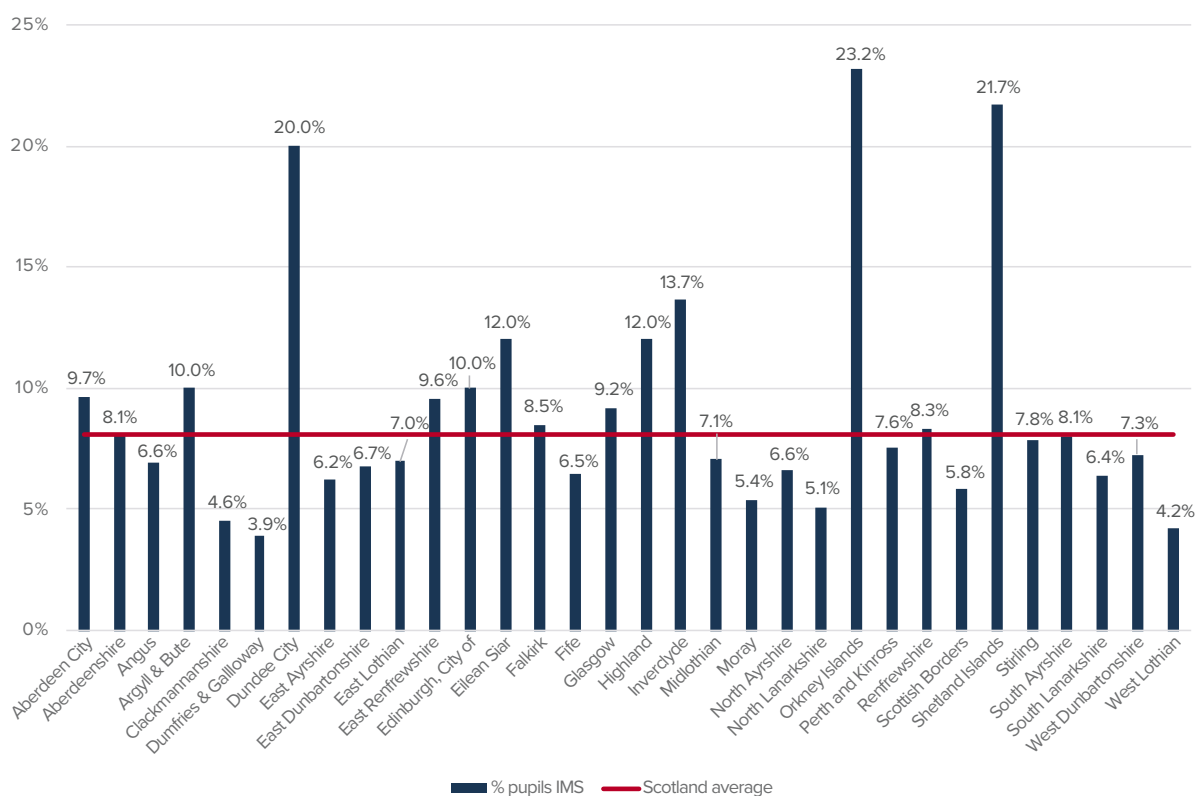
**Figure 1 — % IMS Pupils Claiming FSM compared to % all pupils claiming FSM – includes only local authorities where exemptions apply**



## Number of IMS Pupils

In total, 56,198 pupils received instrumental music lessons from their local authority service at some point in 2019/20 from a total pupil population of 689,805. This figure equates to 8.1% of all Scottish school pupils and 10.8% of all pupils in P4 to S6. Since 2018/19 this is a decrease of 1,298 pupils or 2.3%, the third successive year of decline in pupil numbers. For the first time the number of pupils participating in instrumental music tuition fell below the level recorded in the first Instrumental Music Survey carried out in 2012/13. Since 2018/19, the number of school pupils also increased by 0.65% meaning the overall change in the percentage of pupils taking instrumental music was a drop of 0.3 percentage points from 8.4%. Between local authorities, the proportion of school pupils taking part in instrumental music lessons ranges from 3.9% to 23.2%. The variation in these proportions is displayed in Figure 2.

**Figure 2 — Proportion of pupils taking instrumental music lessons 2019/20**



Although the number of IMS pupils in each local authority has fluctuated over time, 2019/20 is the third consecutive year of the survey where overall pupil numbers have fallen following year on year growth in each of the first five years of this survey. Across all local authorities, 25 reported a reduction in pupil numbers between 2018/19 and 2019/20. Local authorities highlighted increased charges and a reduction in teaching capacity due to financial constraints as reasons for this. This reduction was by far the largest proportion of local authorities reporting a decrease in pupil numbers in any iteration of this survey. Unlike last year however, no local authorities reported a

decrease of more than a third in pupil numbers. Table 3 displays the numbers of pupils receiving instrumental music tuition between 2012/13 and 2019/20.

**Table 3 — Number of Instrumental Music Pupils**

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
Aberdeen City	2760	2642	2255	2500	3371	3300	1700	2224
Aberdeenshire	3389	3025	2955	2576	3060	3171	2965	2888
Angus	1500	1200	1434	1146	932	954	Approx. 950	1052
Argyll & Bute	1258	1435	1334	1226	1141	1056	1185	1017
Clackmannanshire	432	448	345	444	392	432	309	299
Dumfries & Galloway	1210	1317	1552	1294	1166	809	750	735
Dundee City	2200	2669	2938	3538	3677	3793	3987	3619
East Ayrshire	1147	783	823	1002	1242	1194	1214	976
East Dunbartonshire	1301	1600	1410	1586	1382	1191	1226	1147
East Lothian	1284	1318	1327	1331	1341	1245	1119	1022
East Renfrewshire	1942	1938	1904	2010	1732	1596	1705	1648
Edinburgh	4758	4912	5215	5100	5089	5084	5089	5071
Eilean Siar	360	500	500	766	2323 (inc. Gaelic Singing) 540 (excl. Gaelic Singing)	1898 (inc. Gaelic singing), 868 (excl. Gaelic singing)	496	400
Falkirk	1142	965	1376	1950	2057	1854	1925	1852
Fife	3494	3161	3332	4415	4434	3365	3645	3232
Glasgow	4538	4551	4573	4597	4919	5448	5876	6300
Highland	3100	3200	3400	3450	3100	2900	3600	3700
Inverclyde	1015	1300- 1400	1677	1388	958	1298 (inc. 161 withdrawn)	1297	1326
Midlothian	1100	1100	1221	1312	1302	1321 (426 received instruction in 2 instruments)	994	924
Moray	850	850	893	910	815	800	594	643
North Ayrshire	1570	1627	1554	1487	1555	1432	1304	1184
North Lanarkshire	3853	3670	3685	3599	3409	2941	2646	2437
Orkney Islands	498	500	531	581	646	663	695	646
Perth & Kinross	1590	1605	1690	1711	1762	1716	1564	1359
Renfrewshire	1050	1280	1534	1546	1532	1949	1981	1945
Scottish Borders	716	862	895	995	906	907	878	848



	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
Shetland Islands	662	561	570	724	721	722	779	712
South Ayrshire	1222	1319	1240	1126	1266	1197	1133	1125
South Lanarkshire	2957	3029	3035	3050	2990	2900	2850	2850
Stirling	810	844	844	898	950	940	1030	989
West Dunbartonshire	964	891	941	926	1034	1102	813	897
West Lothian	2448	2395	2468	2397	2194	2178	1197	1131
Scotland	57120	57547	59451	61581	61615	60326	57496	56198

Since 2012/13 there have been differing trends in the number of pupil numbers in local authorities that charge tuition fees and those who do not. Figure 3 displays the change in pupil numbers over time for both charging and non-charging local authorities. Local authorities have been grouped depending on whether the local authority charged for tuition in 2019/20. Since 2012/13, non-charging local authorities have seen a relatively large increase in pupil numbers, increasing 31.4% over the period. Charging authorities in contrast have seen an overall decline of 12.7% in pupil numbers. It should be noted that the local authorities within each of these groups have changed over time.

**Figure 3 — IMS Pupil Number Changes - 2012/13 to 2019/20**

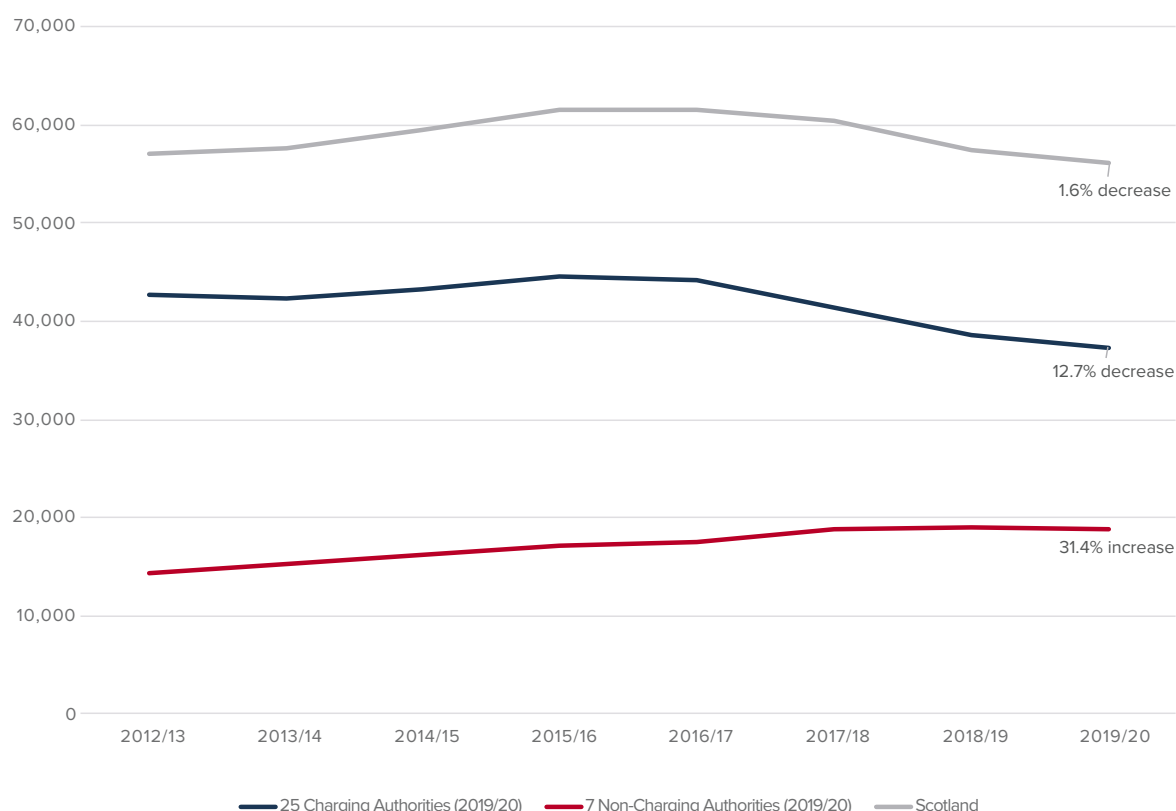
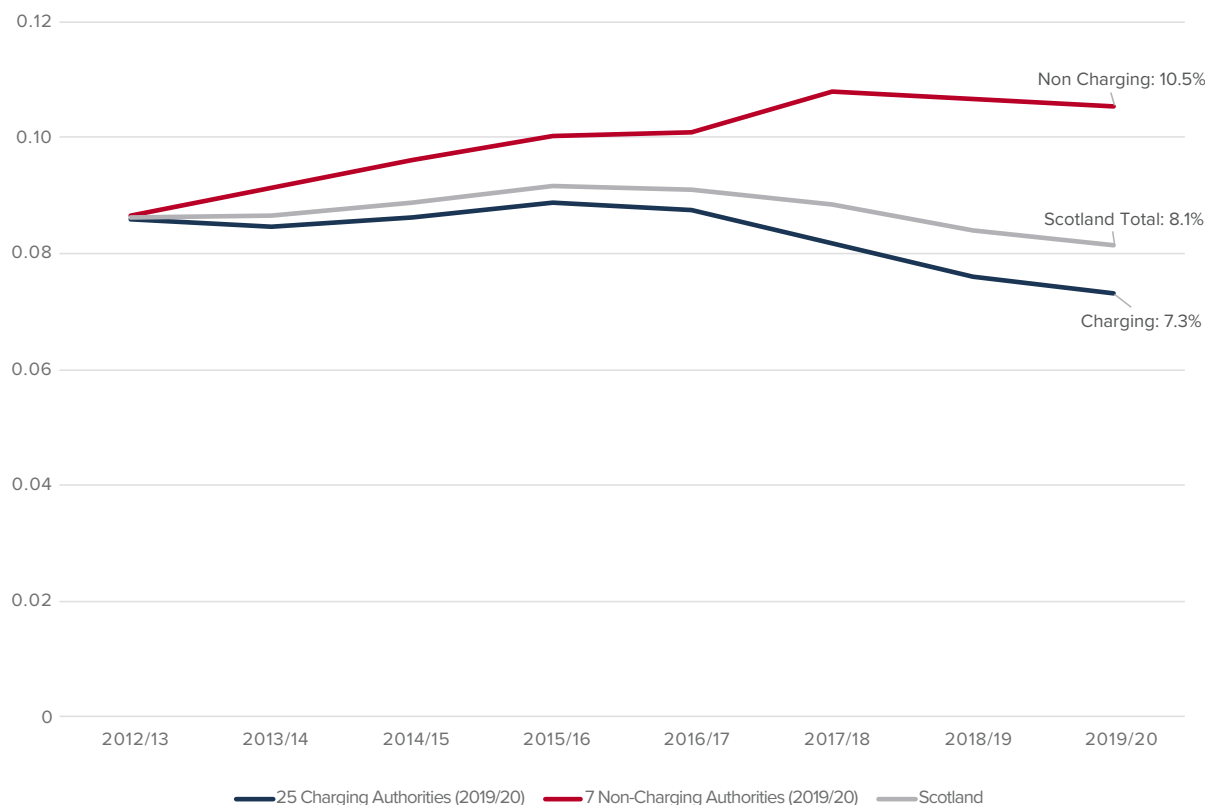


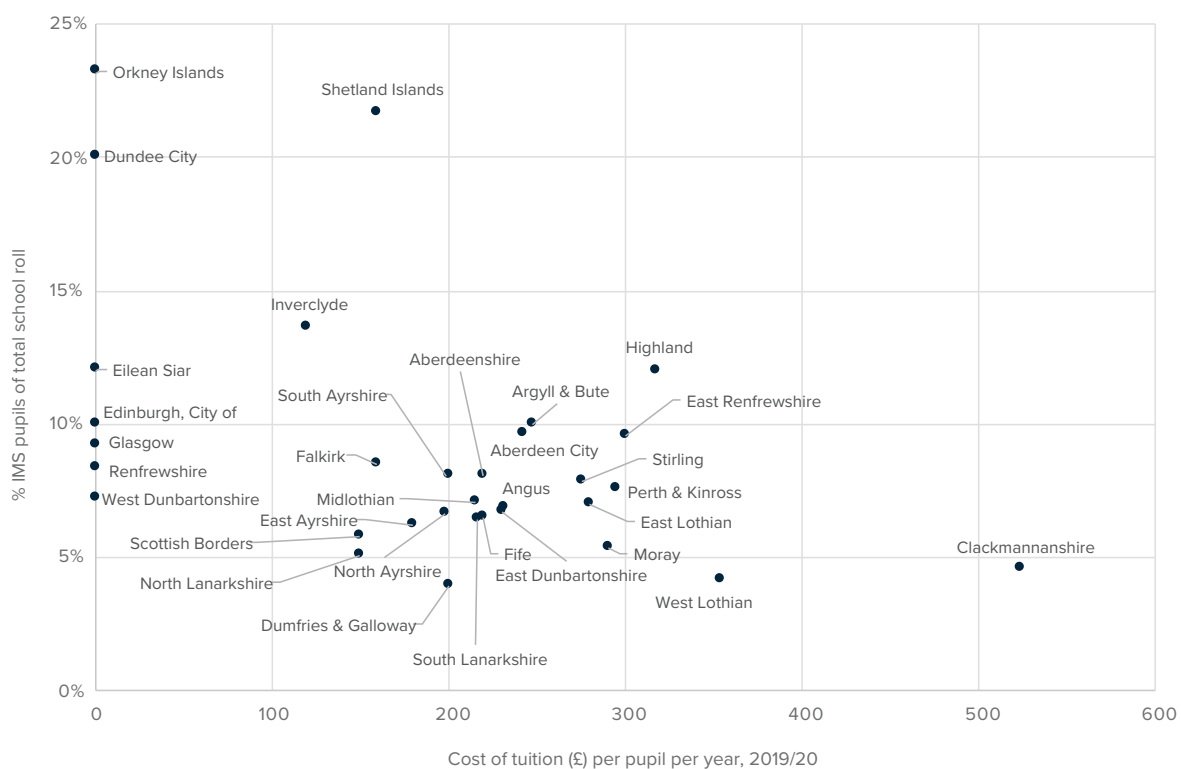
Figure 4 displays the percentage of pupils within local authorities who participated in instrumental music tuition. These figures demonstrate that authorities without charges have a higher proportion of pupils taking part. The figures also show that

the participation rate has fallen as a whole across Scotland and both within charging and non-charging authorities in recent years. In local authorities that do not charge tuition fees participation fell for the second year in a row from a peak in 2017/18, while charging authorities, as well as the Scotland total, have seen a steady year on year decline in pupil numbers since 2015/16.

**Figure 4 — Percentage of Pupils Participating in IMS, 2012/13 to 2019/20**



In 2019/20 there was a weak negative relationship between the proportional uptake in music tuition and charges for tuition. This means that local authorities with higher charges tended to have a slightly lower proportion of pupils undertaking instrumental music tuition. This could be partly caused by two councils with no charges and very high uptake – Dundee City and Orkney Islands. Figure 5 displays the percentage of pupils who participated in instrumental music tuition in 2019/20 from the whole school roll compared with the cost of tuition among local authorities.

**Figure 5 — Percentage of All Pupils Participating in IMS by Cost of Tuition, 2019/20**



# Selection Procedures

Demand for instrumental music lessons outweighs resources in the majority of local authorities, as has been the case historically. Only six local authorities were able to provide provision for all interested pupils in 2019/20. In most local authorities the pressure on resources means that providing instrumental music lessons to all interested pupils is just not possible despite a desire to do so. Most local authorities report that limited resources, such as staffing, particularly for certain popular instruments, timetable space, and not having available instruments were the main barriers to providing music tuition to all pupils. Local authorities have different means of balancing the demand for provision with the available resources. Whilst some use selection procedures to narrow provision to the most suitable pupils, others work on a first come first served basis with waiting lists for those where provision is not available. Aberdeenshire Council had also piloted larger group lessons in order to increase provision, however this was interrupted by Covid-19 related school closures.

Specific selection procedures were used in 18 local authorities in 2019/20. Aberdeenshire removed their selection procedure in 2019/20. Selection procedures tend to include some form of aptitude test to assess the pupil's ability to learn a new instrument, alongside consultations with staff and parents. These types of tests are also used in other local authorities not as a means of selecting which pupils will receive lessons, but in order to ensure pupils are best placed with the correct instrument and both pupils and families are happy with their choices. In some Council areas a free trial or reduced fees are offered for new pupils, which helps pupils to self-assess their own interest and desire to continue with lessons.





## Other Variations in IMS Policies

In most local authorities, instrumental tuition is first offered to pupils when they reach Primary 4. However, in a large proportion of local authorities only certain instruments are offered at this school level and tuition in other instruments is generally not offered until later stages in the pupil's school career. String instruments are most commonly offered at the earliest age, whilst tuition in percussion instruments are generally offered much later. In some cases, larger instruments are not offered to younger pupils, while some instruments are offered only once adult teeth have begun to emerge.

The vast majority of local authorities do allow pupils to apply for instrumental music tuition in more than one instrument. Whilst some local authorities have no restrictions on whether pupils apply for tuition in more than one instrument other than resources, many local authorities only allow lessons in a second instrument in special circumstances. Permitting circumstances often include pupils who need tuition in a second instrument as part of their SQA Music course, or pupils who plan to continue further education in music. In most cases, however, tuition in a second instrument tends to only take place where resources permit, and not at the expense of another pupil receiving tuition in their first instrument. In local authorities where pupils can receive tuition in more than one instrument and tuition fees apply to instrumental tuition, around half apply concession or exemption policies to this second instrument.

The length of instrumental music lessons also varies amongst local authorities. On average, most pupils receive a minimum of 24 minutes tuition per instrument per week, but lessons range from a minimum of 15 minutes to a maximum of 50 minutes. Generally, lessons last a full school period for secondary school pupils, which can vary between schools. Longer lessons are most common in larger group lessons or for secondary pupils who are more likely to be sitting exams. Local authorities also vary in the number of pupils in a group lesson. Most local authorities allow individual lessons;

however, lessons are regularly taught in small groups. On average, the maximum group size amongst local authorities is just under 10 pupils but in a small number of cases groups can be as large as 35 where whole bands or orchestras are taught together. Pupils on average receive as a minimum 30 weeks of lessons per year, but the service guaranteed minimum varies across Councils. Many local authorities offer more lessons than their service minimum, depending on resources. Some also offer refunds on tuition fees if the service minimum is not met.

In many cases the minimum number of lessons could not be delivered in 2019/20 due to school closures. As a result, many local authorities offered a refund or paused collection of fees, and lessons were often provided remotely.

These policies have not changed substantially from previous years. Further details of these policies can be found in the appended summary tables.



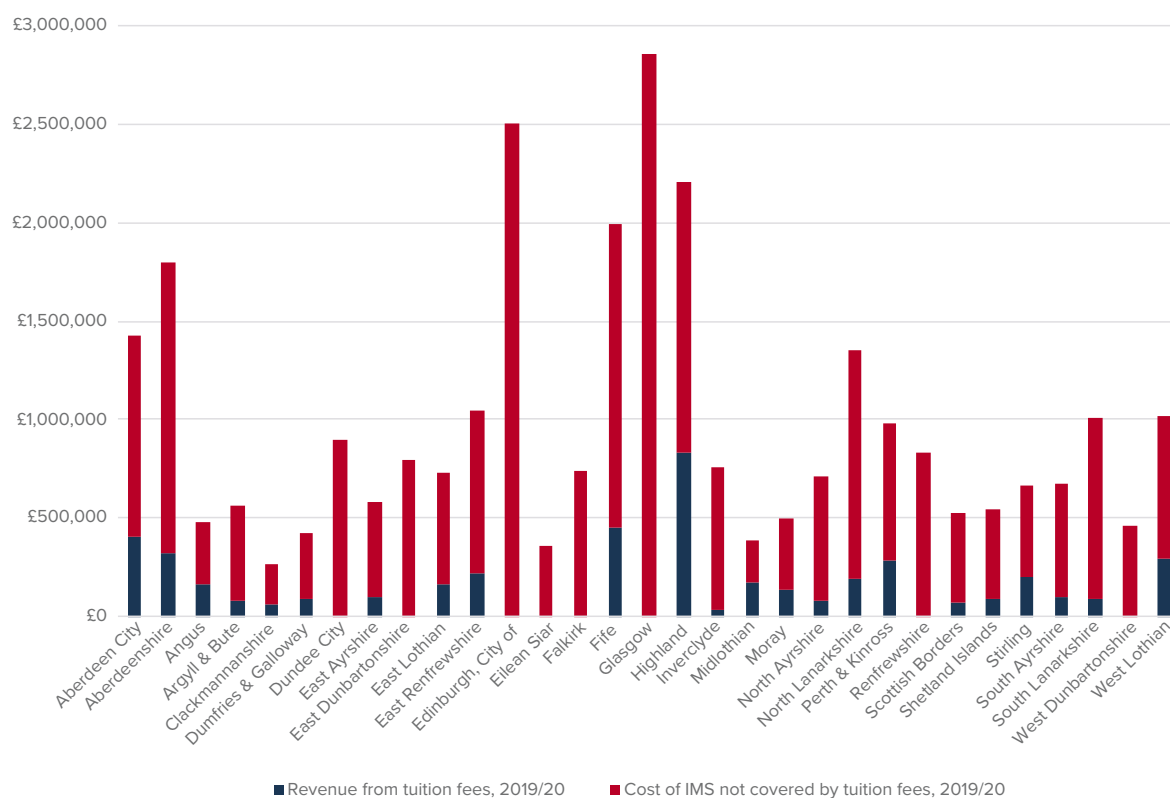
## Revenue and Budget Allocations

In total in 2019/20, for the 31 local authorities where data was provided, the gross cost of providing instrumental music services was £30,061,758. At a local authority level, the average cost of providing these services has increased in cash terms in the most recent year by 0.7%, and decreased by 1.2% in real terms, however care should be taken in analysing these results due to missing data. Looking only at local authorities where data was provided for both 2018/19 and 2019/20, 33% of these 27 local authorities have shown no change or a reduction in the cash terms gross cost of their instrumental music service between these two years. The average change across all local authorities was an increase of 3.8%, slightly higher than the rate of inflation. Changes varied considerably, ranging between a drop of 23.3% to an increase of 26.9%.

In local authorities where tuition fees apply, a proportion of the gross running cost is covered by revenue generated from these fees. In 2019/20, a total of £4,613,375 was raised through tuition fees. Between 2018/19 and 2019/20 revenue from fees for local authorities that were able to provide data for both years reduced by 1.4% in cash terms. Revenue from fees was significantly reduced for several local authorities as a result of refunds due to Covid-19, and it should also be noted that many local authorities were also only able to return an estimated figure as a result. The proportion of running costs covered by these fees in charging authorities ranges between 4% and 45%. Figure 6 shows the split in cost covered by tuition fees and the total provided by the local authority or other sources. Overall, the combined revenue generated by fees across all authorities accounted for 15% of the total gross running cost, and 21.6% of the total running costs for only charging authorities.<sup>2</sup>

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2 Among local authorities where data was provided:  
Revenue from tuition fees: £4,613,375  
Gross total cost: £30,061,758  
Gross total cost, charging authorities only: £21,371,871

**Figure 6 — Revenue from Tuition Fees and the Total Cost of IMS, 2019/20**

Variation in the proportion of the cost covered by tuition fees is partly a result of variation in tuition fees, as well as variation in pupil uptake. There is no relationship between running costs and tuition fees, meaning that local authorities with higher running costs do not necessarily charge higher fees. There is, however, a very strong positive correlation between running costs and pupil numbers, as higher numbers of pupils result in a greater level of resource needed.

In some local authorities, part of the running cost of instrumental music services is covered by private sponsorship. In others, private sponsorship arrangements are in place to help provide additional activities outside the core instrumental music tuition. These various arrangements have changed very little since previous surveys. Details of these arrangements are available in the appended summary tables.





# Instrumental Music Instructors

Local authority instrumental music services provide a wide range of instrumental instruction including tuition in strings, woodwind, brass, guitar, percussion and traditional instruments, such as bagpipes. Tuition in strings has continually taken the greatest resource with the largest number of Full Time Equivalent (FTE) instructors hired in this discipline across Scotland. This number has however declined each year since 2013/14. This can be seen in Table 4 which displays the number of FTE instructors hired in each discipline across Scotland between 2013/14 and 2019/20. A breakdown of FTE instructors within each local authority in 2019/20 is available in the appended summary tables.

**Table 4 — FTE by discipline, 2013/14 - 2019/20**

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
Strings	180.3	175.3	174	168.2	166.46	162.03	159.63
Woodwind	124.5	123.3	123.5	119.6	122.22	114.61	112.57
Brass	120.8	125.2	123.1	119.8	118.05	111.82	111.46
Percussion/ Drum Kit	64.4	62.2	64.4	64.7	64.87	64.56	65.16
Guitar	56.8	60.6	61.1	58.9	58.94	59.57	58.57
Traditional Instruments (exc. Piping & Highland Drumming)			9.3	7.5	6.51	7.07	8.07
Bagpipes/ Chanter			33.1	34.8	37.1	38	37.3
Highland Drumming			4.6	5.1	4.7	8.6	8.6

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
Traditional Instruments (inc. Piping & Highland Drumming)	37.5	46.5	47	47.4	48.31	53.67	53.97
Voice	17.8	19.3	21.5	27.4	20.38	21.34	21.88
Piano/Keyboard	43.6	41.8	43.7	41.3	42.59	35.85	34.24
Other: (please specify)	4.8	2.4	7.3	6	6.6	8.86	8.4

The number of FTE instructors across Scotland reduced between 2015/16 and 2016/17, but increased slightly in 2017/18. However, the figures for 2018/19 showed a decrease of around 4%, and this trend continued with a further 2% decrease in 2019/20. This means that tutor numbers are at the lowest recorded in any iteration of this survey. Alongside this overall decrease in FTE, the number of full-time instructors fell by 5 from 2018/19, while part-time instructor numbers increased by 11. It is likely that these reductions have contributed to the fall in total pupil numbers within these services. The breakdown for instructor numbers is displayed in Table 5.

**Table 5 — Total Instrumental Instructor Numbers 2013/14 - 2019/20**

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
FTE	651.9	657.2	660.3	640.6	644.14	619.98	604.5
Full-Time	412	411	415	413	401	373	368
Part-Time	483	465	433	392	457	422	433





## Reviewing Practices

There are a variety of procedures and policies for reviewing, engaging, and sharing information across instrumental music services in Scotland. Examples of these procedures are available in the appended Summary Tables.

Different instrumental music services have different means of reviewing current policies around charging and concessions. In a number of cases these policies are reviewed in line with other charging policies across the councils. In some cases, decisions are also made by elected members. Many local authorities also mentioned that COSLA guidance is currently used.<sup>3</sup> This year Covid-19 has meant that many Councils have suspended fees and are yet to review the final charges for 2020/21 or in some cases will not be reviewing fees. A selection of other reviewing practices includes:

- In Aberdeenshire the IMS manager submits a report to the Council for consideration. In past years increases have been in line with the Retail Price Index, but there were no increases in 2019/20. The report has been delayed this year due to Brexit and the delay to financial reporting within the council.
- In Clackmannanshire fees are usually increased in line with the rate applied across all Council charges.
- In Highland general reviews take place on an occasional basis. The exemptions policy is reviewed in line with appropriate tax/benefit changes.
- In Inverclyde, any changes or policy reviews are identified by senior management and passed to Committee for approval/dismissal by elected members.
- In North Ayrshire, all proposed changes are made in line with Council Procedures and efficiencies The COSLA guidance will also be used in the future.

3 [https://www.cosla.gov.uk/\\_data/assets/pdf\\_file/0018/19440/190226-music-instrumentalmusic-tuition-guidance-2019.pdf](https://www.cosla.gov.uk/_data/assets/pdf_file/0018/19440/190226-music-instrumentalmusic-tuition-guidance-2019.pdf)

- In Shetland Islands charges are reviewed on an annual basis by reports sent to Council as part of the Annual review of charges for all local authority income streams.
- In South Ayrshire data and information is gathered on numbers receiving instrumental instruction across schools within the authority. This gives a clear picture of uptake and opportunity and informs the service of any trends or patterns that may develop. This is used to monitor uptake particularly across SIMD areas allowing the Council to plan ahead to support equity and opportunity.

In addition to the continued completion of the annual National Instrumental Music Survey, Instrumental Music Services continue to ensure that information about their individual services is shared with colleagues in other local authorities. The Heads of Instrumental Teaching Scotland (HITS) network, including through Microsoft Teams, continues to help facilitate the sharing of this information alongside work done by individual services. For example:

- A number of local authorities, including East Dunbartonshire and East Renfrewshire have joint in-service events with neighbouring local authorities to build capacity for professional learning.
- National conferences and seminars
- Sharing through social media and the Music Education Partnership Group
- Through Regional Improvement Collaboratives for Education.



## Summary

As with all local authority services, Covid-19 has had a major disrupting effect upon IMS in both academic years 2019/20 and 2020/21. Lessons have been cancelled or moved online, fees have in many cases been suspended, and there remains some uncertainty around how instrumental music tuition will be delivered moving forward. Despite this challenge, it remains clear that instrumental music services remain popular and widely accessed with approximately 56,198 pupils, more than 8% of the whole school roll and almost 11% of all pupils in Primary 4 and above, receiving lessons at some point in 2019/20 and at least 16,460 pupils also participating in additional activities run by these services. Services remain inclusive and open to all despite increasing pressure on budgets, with a range of concessions and reduction to fees, which apply to over a third of pupils engaged in instrumental music tuition.

Although fees did not increase significantly in 2019/20 compared to previous years, the number of pupils receiving instrumental music lessons with Scottish local authority led services declined for the third consecutive year. Pupil numbers are now at the lowest levels recorded in any iteration of this survey. Large rises in fees in 2017/18 may be contributing to a lower level of participation in many areas, and areas where fees are not charged continue to have consistently higher rates of participation. That is not to say that fees alone can account for this trend, and indeed variation in fees only accounts for a proportion of the variation in participation rates. With budgets declining on average in real terms in 2019/20 there is clearly less capacity to offer services to pupils. The vast majority of instrumental music services are limited by resource and teaching capacity and are unable to provide lessons for all interested pupils. A second consecutive decrease in instructor numbers employed by these services, with FTEs down by over 40 in two years, is a major contributing factor towards this trend. Covid-19 has seen many areas write off fees in the final term of 2019/20 and freeze or cancel fees in the current academic year. It remains to be seen how this will impact resources

for these services and how participation will be affected in the coming years.

Although tuition fees and the available resource are important factors in understanding the rate of participation in instrumental music services there are a number of additional important factors that contribute. Examples include class sizes, selection procedures, geographic spread, and availability of instruments, as well as other regional differences. Some of these, such as selection procedures and class sizes are covered in this survey. Despite these factors, local authorities have made a concerted effort through a range of concessions and exemptions to ensure that ability to pay should not impact the ability of any pupil to participate in instrumental music tuition. The survey and report highlight the importance of continually monitoring the cost of tuition fees and available concessions annually to ensure equity of access, particularly given the introduction of fees and increasing fees in several local authorities, and the subsequent decline in pupil numbers over the past three years. Survey results highlight that instrumental music services in Scotland are continually improving annually in terms of monitoring standards, undertaking reviews, and ensuring parent contact time. Moreover, communication between services has continued to be excellent, resulting in improved information sharing and learning best practice from other instrumental music services. This survey and report support instrumental music services across Scotland. It enables them to compare provision in other local authority areas, share best practice and innovation whilst monitoring components such as pupil and teacher numbers.

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November 2020

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