

Instrumental Music Services

Results from the IMS
Survey May-July 2018



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Introduction

This report details results from the 2018 National Instrumental Music Survey in Scotland. The survey has now run for six consecutive years 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 current 2018 survey was issued to HITS colleagues in May 2018 and presents results relating to the 2017/18 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.



Charging Policies

Although the current results focus on the previous 2017/18 academic year, local authorities were also asked to provide any proposed changes due to take place in the current 2018/19 academic year. Instrumental music tuition fees vary widely across Scotland but overall, figures provided for the 2018/19 academic year demonstrate a sharp increase in fees compared to previous years. The current 2018/19 academic year has seen 38% of local authorities raise tuition rates including the introduction of fees in several local authorities where previously tuition was offered free of charge. This has resulted in an overall increase in fees across Scotland and the highest of which place well above historic levels. The current 2018/19 fees for group lessons range from £117 to £524, as seen in Table 1.

In the 2017/18 academic year, the average group lesson fee, amongst those local authorities who charged, was £212.19. Changes provided by councils for the most recent academic year, 2018/19, indicate that this average has now increased to £234.76. This is an increase of £22.57, or 10.6%. Of the historic years surveyed, this is the largest increase in the average tuition fees seen since 2016/17 when the average group tuition fee increased by £19.26 (10.5%).

The increase is largely driven by the introduction of fees in several councils. In the current academic year, four local authorities are introducing fees. These are the only new introduction of fees between 2012/13 and 2018/19, other than the introduction of fees in Dumfries and Galloway in 2016/17. The four councils where tuition rates were introduced for 2018/19 are:

- West Lothian – introduced a fee of £354
- East Lothian – introduced a fee of £280
- Midlothian – reintroduced fees, following two academic years of no fees. The fee for 2018/19 is £205.50 which is an increase of £121.50 (144.6%) from the most recent previous fee of £84 in 2015/16
- South Ayrshire – introduced a fee of £200

Ten other local authorities made changes to their tuition rates in 2018/19, these include:

- Aberdeenshire – increased rates for both group and individual lessons by 4%. Group lessons increased £8 to £220 and individual lessons increased £12 to £328 a year
- Argyll and Bute – increased fees by £7 (3%) to £239.97
- Clackmannanshire – increased fees by £265.50 (103%) to £524
- Dumfries and Galloway – tuition fees remained at £200 a year, however the instrument hire fee of £49.50 a year was removed
- East Dunbartonshire – increased fees by £7 (4%) to £177
- Eilean Siar – previously fees were charged for pupils receiving fiddle or guitar lessons in the Nicolson, and piano in the Sgoil Lionacleit. These fees have now been removed
- North Ayrshire – increased fees by £18 (10%) to £198. This fee is also being introduced to S3 pupils where it was not previously.
- Shetland Islands – increased rates for both group and individual lessons by £10 a year, equating to a 7% increase for group lessons to £150 a year, and 5% increase for individual lessons to £200 a year

- Perth and Kinross – increased fees by £49.15 (20%) to £295
- Stirling – increased fees by £9 (3%) to £267

Table 1: Instrumental Music Tuition Charges 2012-2018 - all charges are for group lessons, unless stated

Council	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	Current 2018/19 fees
Clackmannanshire	£220	£222	£228	£230	£235	£258.50	£524.00
West Lothian	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	£354
Highland	£252	£252	£264	£264	£290.40	£318	£318
East Renfrewshire	£160	£180	£200	£250	£300	£300	£300
Perth and Kinross	£245.85	£245.85	£245.85	£245.85	£245.85	£245.85	£295.00
East Lothian	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	£280
Aberdeen	£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
Stirling	£189 group, £309 individual	£189 group, £309 individual	£240 group, (no individual lessons)	£246	£252	£258	£267
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	£264.60 group, £378 individual
Argyll and Bute	£138	£142.15	£146.40	£150.80	£226.20	£232.98	£239.97
Angus	£183	£192	£201 + £30 hire	£210 + £30 hire	£231 + £30 hire	£231 + £30 hire	£231 + £30 hire
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
Fife	£125	£125	£125	£140	£180	£220	£220
South Lanarkshire	£180 (£60 per lesson block)	£180 (£60 per lesson block)	£180 (£60 per lesson block)	£210	£210	£210	£210
Midlothian	£150	£160	£168	£84	No Charge	No Charge	£205.50
South Ayrshire	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	£200
Dumfries and 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
North Ayrshire	£120	£140	£160	£180	£180	£180	£198

Council	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	Current 2018/19 fees
East Ayrshire	£100 group, £150 individual	£100 group, £150 individual	£150	£180	£180	£180	£180
East Dunbartonshire	£140	£140	£160	£160	£165	£170	£177
Falkirk	£44.40 group, £178.20 individual + £20.40 hire	£140 ¹	£140	£140	£156	£156	£156
Shetland Islands	£140	£140	£160	£129 group, £172 individual	£135 group, £180 individual	£140 group, £190 individual	£150 group, £200 individual
North Lanarkshire	£150	£150	£150	£150	£150	£150	£150
Scottish Borders	£125	£125	£125	£125	£132	£140	£140
Inverclyde	£95.50	£98	£100	£110	£114	£117	£117
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
West Dunbartonshire	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge (£85 hire)
Edinburgh	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge	No Charge
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. There is an average of 32 lessons per year, costing £400 per pupil per year. Group lessons were £200 per pupil per year.						
Glasgow	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
Renfrewshire	£150	£150	£150	£150	£150	No Charge	No Charge

¹ Instrument loan provided free of charge for up to a year

Within instrumental music services across Scotland, instruments are normally made available to pupils for hire or loan, with variation amongst local authorities as to the policies for these instruments. In some cases, instruments are loaned at no cost, or included as part of the tuition cost, however in three local authorities instruments were hired at an additional cost in 2017/18. In Angus there is an annual fee of £30, in Dundee the charge is £83 rising to £85 in 2018/19, and in Dumfries and Galloway the annual fee was £49.50 in 2017/18, however drum kits and guitars were not available to hire. These fees have been removed for 2018/19. West Dunbartonshire have historically had no instrumental hire fee but have introduced an annual fee of £85 for the 2018/19 school year, which like tuition fees in many other local authorities, will have a range of applicable concessions.

In local authorities where there is no instrumental hire fee, the length of time that the instrument can be loaned for varies across Scotland. In some local authorities, pupils can loan an instrument for the duration of their tuition, however it is also common for services to allow an instrument to be loaned for a set period, normally for a year, after which pupils are encouraged to purchase their own instrument. A number of local authorities do offer support to pupils in purchasing instruments where this is necessary, for example Perth and Kinross have an Instrument Purchase Scheme. Details of these instrumental hire/loan policies are available in the appended summary tables.

In addition to regular tuition, instrumental music services across the country also offer a range of additional activities which 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 most 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. However, in thirteen 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 2017/18 approximately 18,797 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 31% of all IMS pupils in 2017/18. Further details about additional activities can be found in the appended summary tables.

Concessions

All twenty-one local authorities who charged for instrumental music lessons in 2017/18 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 concession is also offered for families with low incomes. The majority of local authorities use free school meal entitlement as criteria for low income and offer full exemption to pupils entitled to this. For those that do not offer full exemption for these pupils there is normally a concession rate, or exemption based on different criteria.

- Aberdeen City, Aberdeenshire, Argyll and Bute, Dumfries and Galloway, East Dunbartonshire, East Renfrewshire, Fife, Highland, Inverclyde, Moray, North Ayrshire, North Lanarkshire, Shetland Islands, Scottish Borders, and South Lanarkshire all offer full exemption for pupils with free school meals entitlement.
- In addition to exemptions for pupils entitled to free school meals, North Lanarkshire and Shetland Islands also offer full exemption for pupils entitled to a clothing grant.
- Angus offer full exemption for families/carers on incomes below £16,105
- East Ayrshire do not offer a specific concession for free school meal entitlement but do

- offer full exemption for parents/carers receiving benefits
- Perth and Kinross offer full exemption for pupils with Parents/Carers on Universal Credit.
- Clackmannanshire offer a roughly 55% concession rate to pupils with free school meal entitlement, which in 2017/18 was a rate of £117.50. This rate is also available to families in receipt of Housing Benefit/Income Support.
- Falkirk offer a concession rate of £60.45 for pupils entitled to free school meals or a clothing grant
- Stirling offer two concession rates:
 - ◆ £69 per year (£23 per term) for families entitled to free school meals or a clothing grant
 - ◆ £198 per year (£66 per term) for families in receipt of Housing Benefit, Council Tax Reduction/Benefit or Education Maintenance Allowance.

Additional concession rates are also offered in a number of local authorities. The most common concession type is sibling discount which is provided in ten local authorities.

- East Ayrshire offer a concession of 50% to the second sibling and full exemption for the third sibling
- North Ayrshire and North Lanarkshire offer a 50% sibling discount
- Aberdeen City offer a 50% discount for younger siblings on their first instrument only. If a younger sibling learns two or more instruments the second and subsequent instruments are charged at full price
- East Renfrewshire offer a 25% sibling discount
- Angus offer a 20% discount for the second child and the third and subsequent children receive a 40% discount
- Aberdeenshire offer a 20% discount per child when two or more siblings are paying for tuition
- Argyll & Bute offer a £15 discount for siblings
- East Dunbartonshire offer a 50% sibling discount
- Scottish Borders offer a discount to fees where more than two young people from the same family are receiving lessons

Several local authorities have further concession rates;

- Discount for pupils learning a second instrument is offered in both Argyll & Bute and North Lanarkshire:
 - ◆ Argyll and Bute offer £15 discount
 - ◆ North Lanarkshire offer 50% discount
- Pupils in Argyll and Bute learning the bagpipes also receive a 50% subsidy from Argyll Piping Trust
- North Ayrshire and Shetland Islands both offer full exemption for pupils who are looked after by the local authority
- In Shetland Islands, new instrumental music pupils also receive the first term free
- North Lanarkshire offer full exemption for pupils with Additional Support Needs (ASN). This is the only local authority to offer any concession or exemption based on this criterion

- Scottish Borders Council offers new starts a discount rate of £85

The concession and exemption procedures described above relate to the 2017/18 academic year and do not differ greatly from those in 2016/17. The changes between the two years are as follows;

- Clackmannanshire extended concession rates to apply also to pupils with free school meal entitlement, where the previous year this concession was only available to those in receipt of housing benefit/income support.
- In Perth and Kinross a new bursary scheme is planned to allow pupils with financial difficulties better opportunities of access to instrumental tuition.
- Stirling have increased concession rates broadly in line with the increase in fees. In 2016/17 concessions rates were;
 - ◆ £66 per year (£22 per term) for families in receipt of free school meals or a clothing grant
 - ◆ £189 per year (£63 per term) for families in receipt of Housing Benefit, Council Tax Reduction/Benefit or Education Maintenance Allowance.

These rates have now increased to;

- ◆ £69 per year (£23 per term) for families in receipt of free school meals or a clothing grant
- ◆ £198 per year (£66 per term) for families in receipt of Housing Benefit, Council Tax Reduction/Benefit or Education Maintenance Allowance.

Several councils have also made changes to the current concession and exemption procedures in the 2018/19 academic year. Given the introduction of new fees in four local authorities in 2018/19 it is unsurprising that there are new policies to note:

- East Lothian have introduced a fee of £280 in the current 2018/19 academic year. Like many other local authorities, pupils will be exempt from this fee if they are SQA music pupils or are entitled to free school meals. Full exemption will also be applicable to pupils entitled to a clothing grant or pupils looked after by the local authority. In addition, siblings will be offered a concession rate of £240 (roughly 85% discount) and the local authority will offer a bursary scheme.
- Midlothian have introduced a fee of £205.50 in the current 2018/19 academic year. Again, full exemption will apply to SQA music pupils (S4-S6, or S3 for fast-track music pupils) and to pupils entitled to free school meals or a clothing grant. Furthermore, families with income below the Education Maintenance Allowance limit can apply for one of 100 bursaries for free tuition.
- South Ayrshire have introduced a fee of £200 in the current 2018/19 academic year. Full exemption from fees is applicable in a number of circumstances;
 - ◆ SQA music pupils
 - ◆ Pupils entitled to free school meals.
 - ◆ S3 pupils studying the instrument as an integral part of their music course in school
 - ◆ Looked after and accommodated children

- ◆ Families in receipt of any of the following benefits;
 - Income Support
 - Income based Jobseekers Allowance
 - Child Tax Credit, only where household income is less than £16,105
 - Child Tax Credit and Working Tax Credit where household income is less than £6,420
 - Universal Credit where earned income is £610.00 or less per month
 - Any income related element of Employment and Support Allowance
 - Support under Part VI of the Immigration and Asylum Act 1999
 - State Pension Credit
 - Incapacity and Severe Disablement Allowance
- West Lothian have introduced a fee of £354 in the current 2018/19 academic year, however no details for concession/exemption procedures were provided.
- West Dunbartonshire have introduced an instrumental hire fee of £85 per instrument, per year. This charge does not apply if pupils own their own instrument. Those pupils studying for an SQA exam or in receipt of free school meals will be exempt from the fee. For pupils who require more than one instrument the full hire charge will apply for one instrument and any subsequent instruments will receive a 50% hire charge discount

Percentage of IMS pupils receiving concessions/exemptions

In 2017/18 there was a total of 60,326 IMS pupils. Of these pupils, there were at least 9053 (15%) receiving concessions/exemptions from tuition fees. Within individual local authorities, where data is available, the proportion receiving concessions/exemptions ranges from 4% to 50%. The most common type of exemption amongst local authorities is exemptions for SQA music pupils, which took up more than 50% of all concession types in the majority of local authorities. Exceptions to this are: Aberdeenshire, where there was a higher proportion of sibling discount concessions, compared with exemptions for SQA music pupils, and East Ayrshire, which had a larger proportion of exemptions given out to pupils whose parents/carers are receiving benefits.

Table 2 displays the number and percentage of instrumental music pupils who received concessions or exemptions from fees in 2017/18. The number of instrumental music pupils includes all pupils who received instrumental music lessons with the local authority service at some point over the course of 2017/18. 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

Local Authority	No. of IMS pupils 2017/18	No. of IMS pupils who received concessions/exemptions in 2017/18	Total no. and % of IMS pupils who received concessions/exemptions 2017/18
Aberdeen City	3300		Withheld
Aberdeenshire	3171	477 SQA music pupils	1202 (38%)
		177 Free school meals	
		548 Sibling Discount	
Angus	954		Unable to access information
Argyll and Bute	1056	57 SQA Music Pupils	161 (15%) (excluding 456 probationers)
		55 Benefit Exempt	
		49 Sibling discount	
		456 Probationers	
Clackmannanshire	432	151 SQA music pupils	167 (39%)
		16 (Housing Benefit / Income Support / Free school meals)	
Dumfries & Galloway	809	138 SQA Pupils	245 (30%)
		107 Free school meals	
East Ayrshire	1194	129 SQA Music Pupils	420 (35%)
		199 Benefit Exempt and clothing grant	
		92 Sibling Discount	
East Dunbartonshire	1191	151 SQA music pupils	330 (28%)
		51 Free school meals	
		128 Sibling Discount	
East Renfrewshire	1596	340 SQA music pupils	601 (38%)
		66 Free school meals	
		195 Sibling Discount	
Falkirk	1854	255 SQA music pupils	337 (18%)
		82 Free School Meals/Clothing Grant	
Fife	3365	370 SQA music pupils	921 (27%) (excludes 36 duplicated pupils who qualified for exemption from SQA and Free school meals criteria)
		587 Free school meals	
Highland	2900		Information not available
Inverclyde	1298	Breakdown not available	50 (4%)
Moray	800	65 Free school meals	140 (17.5%)

Local Authority	No. of IMS pupils 2017/18	No. of IMS pupils who received concessions/ exemptions in 2017/18	Total no. and % of IMS pupils who received concessions/ exemptions 2017/18
North Ayrshire	1432	335 SQA Music pupils	670 (47%)
		256 Free school meals	
		4 Looked After Children	
		75 Sibling Discount	
North Lanarkshire	2941	754 SQA Music Pupils	1412 (48%) (excluding 384 YMI)
		511 Free school meals/Clothing Grant	
		53 Sibling Discount	
		58 Additional Support Needs	
		384 1-year YMI	
		36 Second instrument	
Perth & Kinross	1716	238 SQA music pupils	306 (18%)
		68 Free school meals	
Scottish Borders	907	142 SQA Music Pupils	263 (29%)
		69 Free school meals	
		48 Clothing Grant	
		4 Sibling Discount	
Shetland Islands	722	90 SQA Music Pupils	130 (18%)
		40 Free school meals / Clothing Grant	
Stirling	940	172 SQA music pupils	238 (25%)
		66 Benefit Exempt	
South Lanarkshire	2900	1400 SQA music pupils	1460 (50%) (excluding 530 YMI)
		60 Free school meals	
		530 P5 exemptions (YMI)	

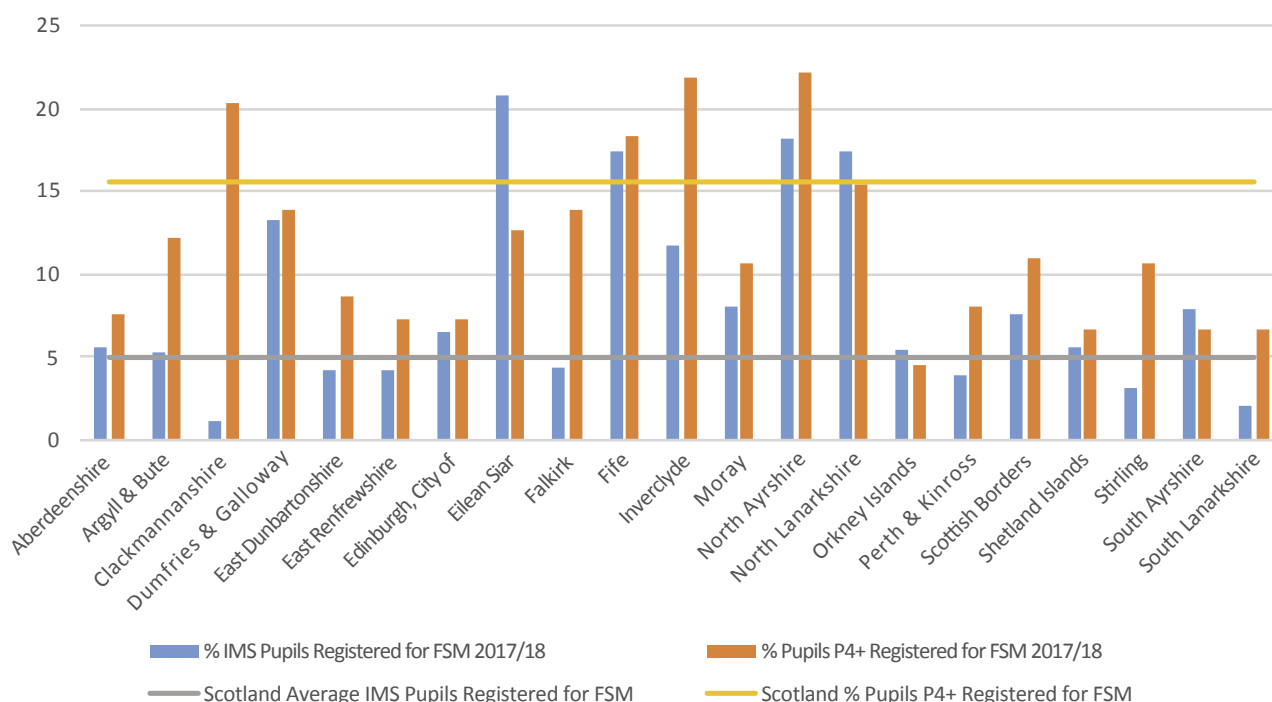


Free School Meal Entitlement (FSM)

Free school meals are offered across Scotland to pupils in Primary 4 onwards whose families are in receipt of a range of different benefits. In 2018 the total number of P4+ pupils registered for these free school meals was 78,722, equating to 16% of the total P4+ pupil roll. Within instrumental music services across Scotland there were 3026 pupils who were registered for FSM, roughly 5% of all IMS pupils. This figure would suggest that pupils registered for FSM are underrepresented within IMS services, in comparison to the overall school population. However, 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 has been provided, the proportion of IMS pupils who are registered for FSM ranges from 1% to 18%. 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.

Figure 1: % IMS claiming FSM compared to % claiming FSM in the local authority

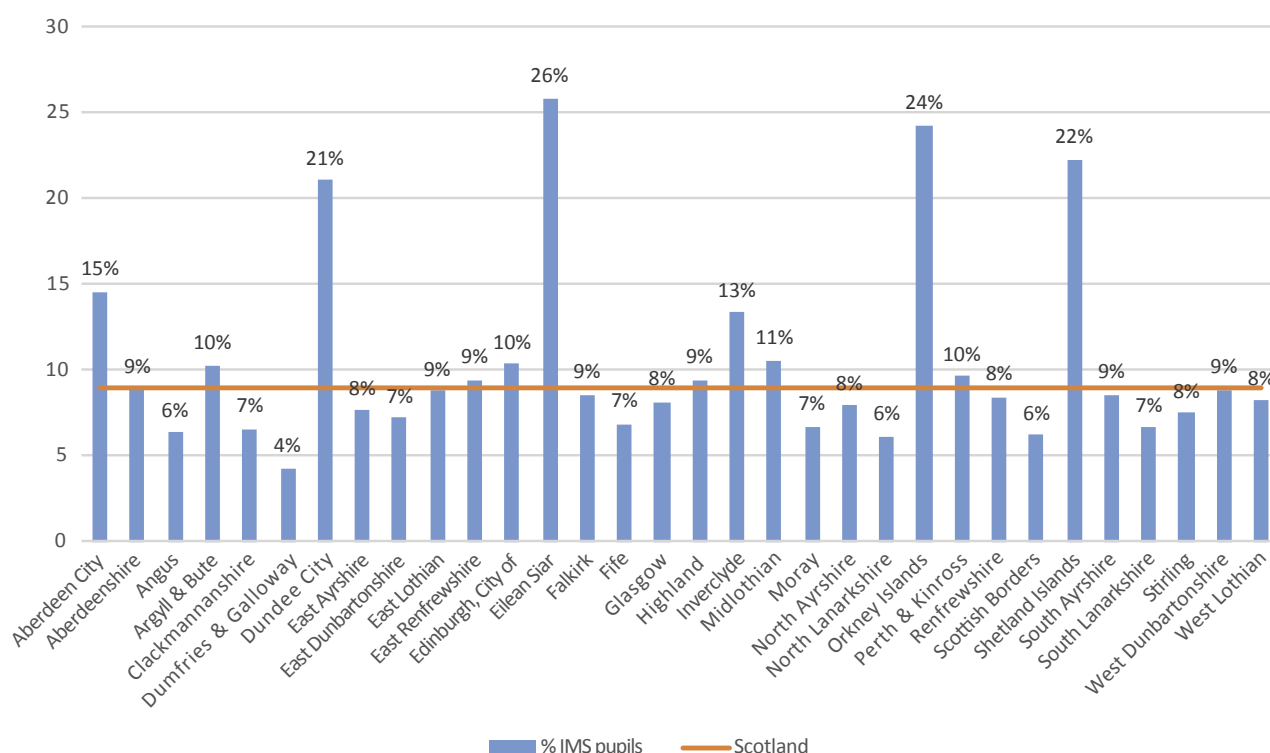




Number of IMS Pupils

In total, there were 60,326 pupils who received instrumental music lessons from their local authority service at some point in 2017/18. This figure equates to 8.9% of all Scottish school pupils. Since 2016/17 this is a decrease of 1289 pupils, or 2.1%. In this period, the number of school pupils also increased by 0.3% meaning the overall change in the percentage of pupils taking instrumental music was a drop of 0.16 percentage points from around 9.1%. Within local authorities the proportion of school pupils taking part in instrumental music lessons ranges from 4% to 26%. The variation in these proportions is displayed in Figure 2.

Figure 2: Proportion of pupils receiving instrumental music lessons 2017/18



Although the number of IMS pupils in each local authority has fluctuated over time, 2017/18 is the first year of the survey where overall pupil numbers have fallen. Across all local authorities 59% (19) showed a reduction in pupil numbers between 2016/17 and 2017/18. There is a higher proportion of local authorities remaining the same or reducing compared with all previous years. Table 3 displays the numbers of pupils receiving instrumental music tuition between 2012/13 and 2017/18.

Table 3. Number of Instrumental Music Pupils

Local Authority	Number of IMS Pupils					
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Aberdeen City	2760	2642	2255	2500	3371	3300
Aberdeenshire	3389	3025	2955	2576	3060	3171
Angus	1500	1200	1434	1146	932	954
Argyll & Bute	1258	1435	1334	1226	1141	1056
Clackmannanshire	432	448	345	444	392	432
Dumfries & Galloway	1210	1317	1552	1294	1166	809
Dundee City	2200	2669	2938	3538	3677	3793
East Ayrshire	1147	783	823	1002	1242	1194
East Dunbartonshire	1301	1600	1410	1586	1382	1191
East Lothian	1284	1318	1327	1331	1341	1245
East Renfrewshire	1942	1938	1904	2010	1732	1596
Edinburgh	4758	4912	5215	5100	5089	5084
Eilean Siar	360	500	500	766	2323 (inc. Gaelic Singing), 540 (excl. Gaelic singing)	1898 (inc. Gaelic singing), 868 (excl. Gaelic singing)
Falkirk	1142	965	1376	1950	2057	1854
Fife	3494	3161	3332	4415	4434	3365
Glasgow	4538	4551	4573	4597	4919	5448
Highland	3100	3200	3400	3450	3100	2900
Inverclyde	1015	1300-1400	1677	1388	958	1298 (inc. 161 withdrawn)
Midlothian	1100	1100	1221	1312	1302	1321 (426 received instruction in 2 instruments)
Moray	850	850	893	910	815	800
North Ayrshire	1570	1627	1554	1487	1555	1432
North Lanarkshire	3853	3670	3685	3599	3409	2941
Orkney Islands	498	500	531	581	646	663
Perth & Kinross	1590	1605	1690	1711	1762	1716

Local Authority	Number of IMS Pupils					
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Renfrewshire	1050	1280	1534	1546	1532	1949
Scottish Borders	716	862	895	995	906	907
Shetland Islands	662	561	570	724	721	722
South Ayrshire	1222	1319	1240	1126	1266	1197
South Lanarkshire	2957	3029	3035	3050	2990	2900
Stirling	810	844	844	898	950	940
West Dunbartonshire	964	891	941	926	1034	1102
West Lothian	2448	2395	2468	2397	2194	2178
Scotland	57120	57547	59451	61581	61615	60326

The growth in pupil numbers varies between local authorities who 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 2017/18. Since 2012/13 non-charging local authorities have seen a relatively large increase in pupil numbers, increasing 22% over the period. Charging authorities in contrast have had an overall decline of 3% in pupil numbers.

Figure 3: IMS Pupil Number Changes - 2012/13 to 2017/18

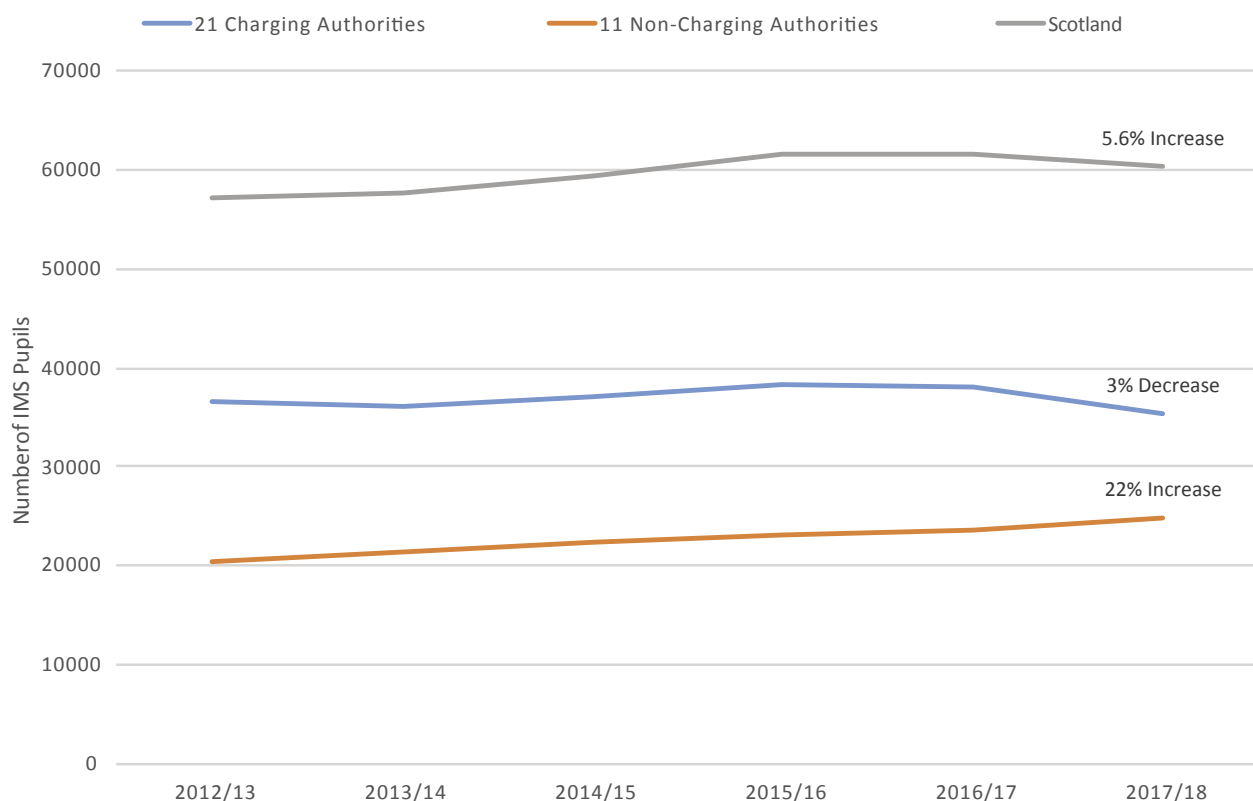
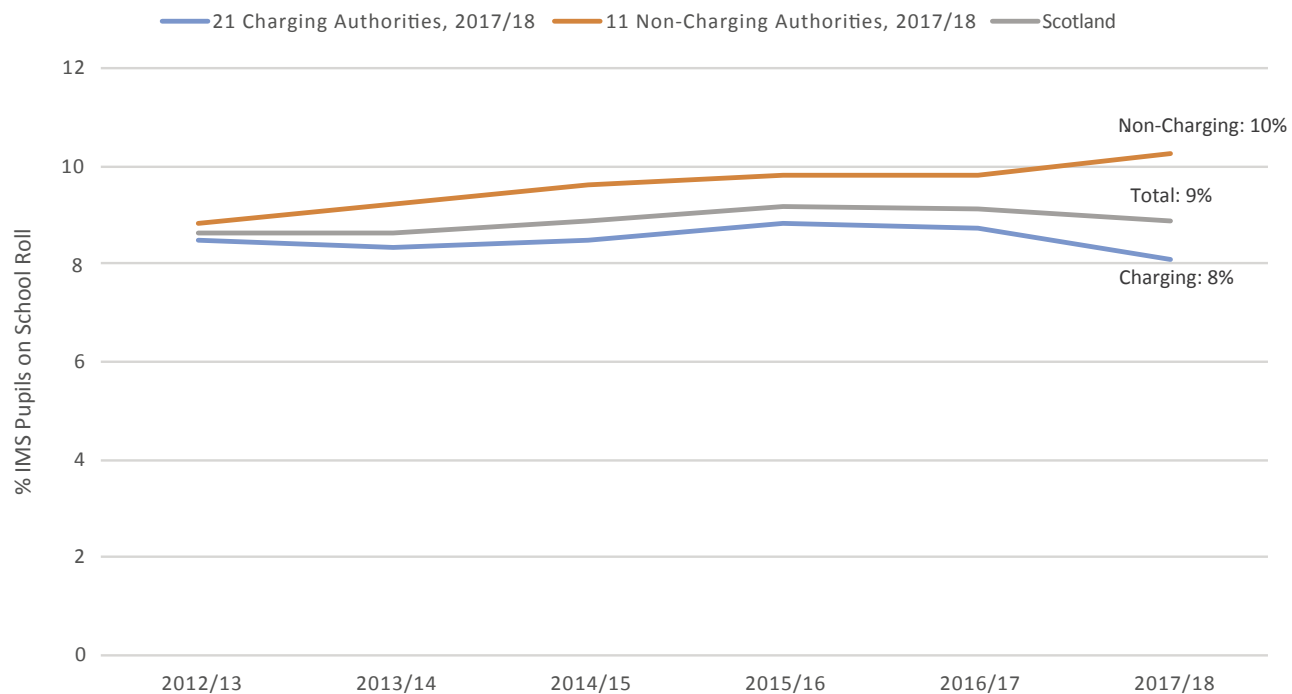


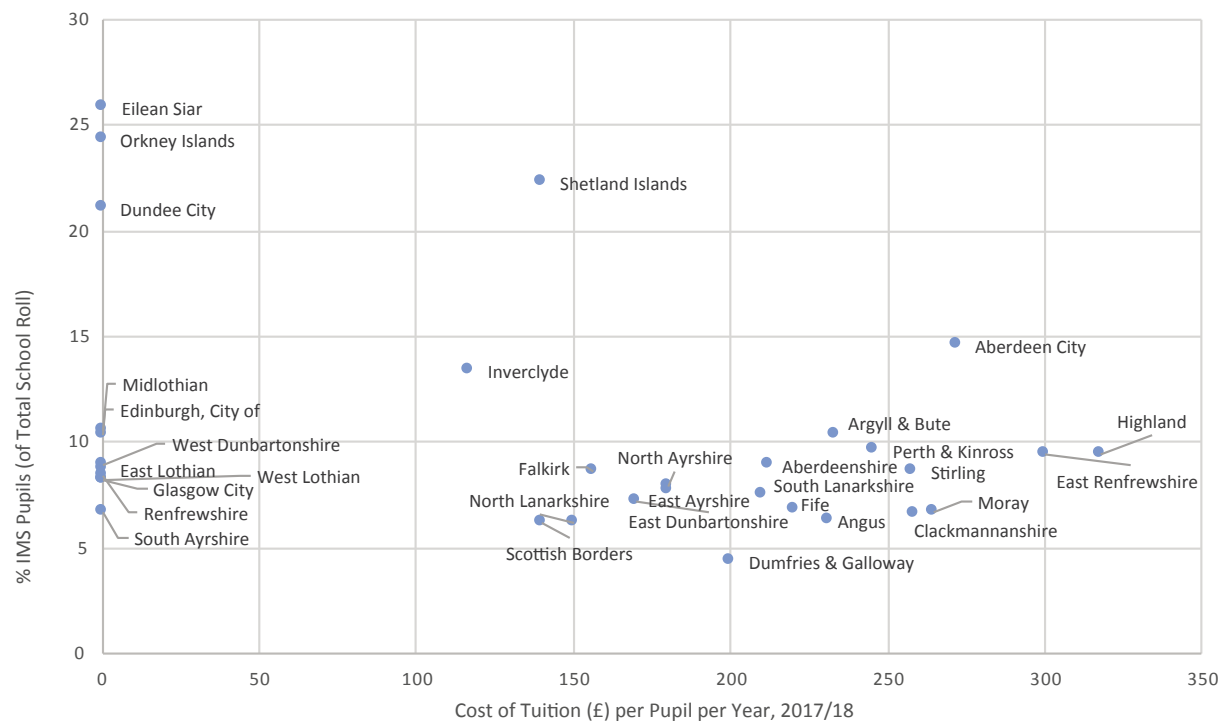
Figure 4 also shows that non-charging authorities tend to have a higher proportion of all pupils taking part in instrumental music tuition whilst the proportion in charging authorities has decreased in the most recent year.

Figure 4 - Percentage of pupils participating in IMS, 2012/13 - 2017/18



Despite the reductions in pupil numbers within charging authorities, as in previous years, there is no statistically significant relationship between the proportional uptake in music tuition and charges for tuition. Figure 5 displays the percentage of pupils who took instrumental music tuition in 2017/18 (out of the whole school roll) compared with the cost of tuition among local authorities.

Figure 5 - Percentage of IMS pupils by cost of tuition, 2017/18





Selection Procedures

Demand for instrumental music lessons outweighs resources in the majority of local authorities, as has been the case historically. Only five local authorities were able to provide provision for all interested pupils in 2017/18. Orkney and Eilean Siar are two of these local authorities which were able to provide for all. These local authorities also happen to be the two local authorities with the highest proportion of pupils taking part in instrumental music lessons. In the case of Eilean Siar the comparative success in maintaining provision for all interested pupils can be at least partly attributed to innovative use of technology. The instrumental music service in Eilean Siar provides e-lessons via schools' video conferencing systems in cases where distance has previously been a barrier to provision.

Nevertheless, in many 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 maintain that limited resources, such as staffing and timetable space, is their main barrier to providing for all. 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. Specific selection procedures were used in 16 local authorities in 2017/18. These selection procedures tend to include some form of aptitude test to assess the pupils' 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.



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 pupils' school career. String instruments are the most common instrument to be offered first whilst tuition in percussion instruments are generally offered much later.

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 instrumental music course, or pupils who plan to continue further education in music. Ultimately 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. Of the local authorities where pupils can receive tuition in more than one instrument, and tuition fees apply to instrumental tuition, in around half concession/exemption policies also apply to this second instrument.

The length of instrumental music lessons also varies amongst local authorities. On average, most pupils receive a minimum of 25 minutes tuition per instrument per week, but lessons range from a minimum of 15 minutes to a maximum of 50 minutes. 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. A number of authorities allow individual lessons; however, lessons tend to be taught in small groups. The average group size amongst local authorities is 5 pupils but groups can be as large as 32 in cases where whole classes are taught together. Pupils on average receive around 31 weeks of lessons per year, however 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.

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, for the 31 local authorities where data was provided, the gross cost of providing instrumental music services was £28,322,726. At a local authority level, the average cost of providing these services has reduced in cash terms in the most recent year by 1.5%, and by 3.6% 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 2016/17 and 2017/18, 52% of these twenty-seven 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 these local authorities was a reduction of 4.7%. Amongst the local authorities where there was an increase in the gross cost, the average increase was 6.1%.

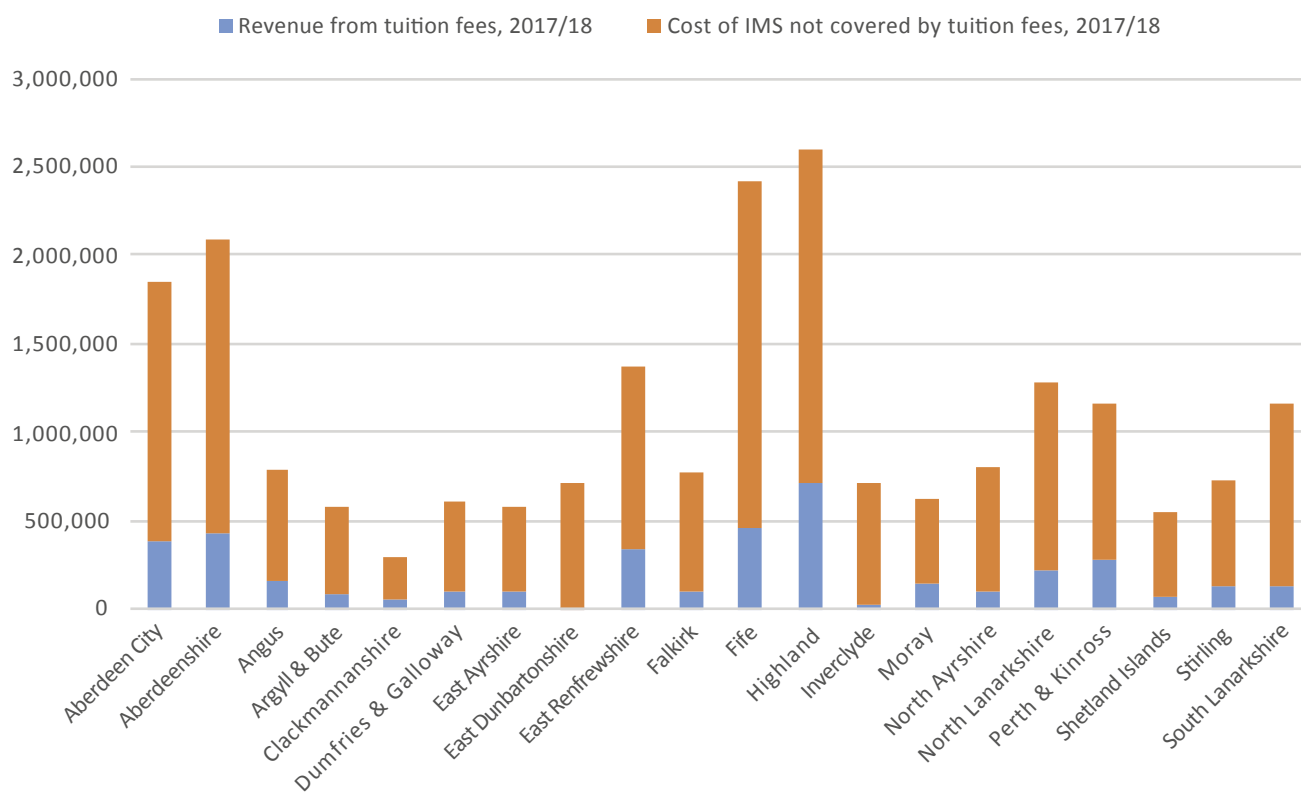
The decline in average gross costs observed is potentially a result of the increasing budget pressures that local authorities are facing. Indeed, the percentage of the education budget allocated to instrumental music services has reduced or stayed the same in the majority of local authorities. In 2017/18 instrumental music services accounted for between 0.004% and 1% of local authority education budgets. Since 2016/17, 39% of twenty-three local authorities where data is available for the two years have had a reduction in this proportion. For all authorities the average change was a reduction of 0.02%.

In local authorities where tuition fees apply, part of the gross running cost is covered by revenue generated from these fees. The proportion of running costs which are covered by these fees in charging authorities, ranges between 5% and 37%. Figure 6 (over) shows the cost covered by tuition fees and the cost remaining in these charging authorities. Overall the combined revenue generated by all authorities accounted for 14% of the total gross running cost, and 23% of the total running costs for only charging authorities².

² Among local authorities where data was provided:

- Revenue from tuition fees: £4,029,807
- Total gross cost: £28,322,726
- Total gross cost, charging authorities only: £17,615,884

Figure 6 - Revenue from tuition fees compared to gross cost of IMS, 2017/18





Instrumental Music Instructors

The majority of local authority instrumental music services provide a wide range of instrumental instruction including tuition in strings, woodwind, brass, guitar, percussion and traditional instruments. 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 can be seen in Table 4 which displays the number of FTE instructors hired in each discipline across Scotland between 2013/14 and 2017/18. A breakdown of FTE instructors within each local authority in 2017/18 is available in the appended summary tables.

Table 4 - FTE by discipline, 2013/14 - 2017/18

	2013/14	2014/15	2015/16	2016/17	2017/18
Strings	180.3	175.3	174.0	168.2	166.46
Woodwind	124.5	123.3	123.5	119.6	122.2
Brass	120.8	125.2	123.1	119.8	118.05
Percussion/ Drum Kit	64.4	62.2	64.4	64.7	64.87
Guitar	56.8	60.6	61.1	58.9	58.94
Traditional Instruments (exc. Piping & H. Drumming)			9.3	7.5	6.51
Bagpipes/Chanter			33.1	34.8	37.1
Highland Drumming			4.6	5.1	4.7
Traditional Instruments (inc. Piping & H. Drumming)	37.5	46.5	47.0	47.4	48.31
Voice	17.8	19.3	21.5	27.4	20.38
Piano/Keyboard	43.6	41.8	43.7	41.3	42.59
Other	4.8	2.4	7.3	6.0	6.6

The number of FTE instructors across Scotland reduced between 2015/16 and 2016/17, but increased slightly in 2017/18. Although the overall FTE has increased, the number of full-time instructors fell by 12 from 2016/17, and there has been a substantial increase in the number of part-time instructors of 65, around 15%.

Table 5 - Total Instrumental Instructor Numbers 2013/14 - 2017/18

	2013/14	2014/15	2015/16	2016/17	2017/18
FTE	651.9	657.2	660.3	640.6	644.14
Full Time	412	411	415	413	401
Part Time	483	465	433	392	457

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. A selection of other reviewing practices includes:

- In Eilean Siar a part time music development officer has been appointed whose role involved reviewing current service provision, recruitment policy, charging and funding opportunities.
- Falkirk Instrumental Music Service carry out equity and poverty impact assessments and use comparisons with fees across Scotland in their review practice
- The exemption policy in Highland Instrumental Music Service is reviewed in line with appropriate tax/benefit changes
- In Midlothian, the most recent review was conducted at a political level to which the decision was made to reinstate tuition fees for 2018/19

Procedures for engaging with parents/carers also vary by local authorities, however the majority of services have several means of engaging. This usually involves a combination of some of the following: information booklets; contract guidelines and/or publicity leaflets; record books/ diaries; tuition progress reports; parents' evenings and meetings; parent committees and support groups; surveys; concerts and events; information shared on the council/IMS website; as well as more bespoke communication via social media, letters, telephone, and email.

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 are shared with colleagues in other local authorities. The Heads of Instrumental Teaching Scotland (HITS) network continues to help facilitate the sharing of this information alongside work done by individual services. For example:

- A number of local authorities, including East Renfrewshire, North Ayrshire, South Ayrshire and East Ayrshire have joint in-service events with neighbouring local authorities to build capacity for professional learning.
- National conferences and seminars
- Sharing through social media



Summary

Overall the number of pupils receiving instrumental music lessons with Scottish local authority led services has remained largely consistent over the past 6 years, although for the first time pupil numbers dropped in 2017/18. In total, approximately 60,326 pupils received lessons and at least 18,797 pupils also participated in additional activities run by these services.

These services strive to provide opportunities for as many young people as possible, for example by organising numerous auxiliary activities such as bands, ensembles, orchestras, concerts and residential courses. Despite this, the majority of instrumental music services are limited by resource and teaching capacity, and are unable to provide lessons for all interested pupils. This is despite a small increase in instructor numbers employed by these services. These figures will be monitored to consider how this impacts on tuition and participation rates.

The lack of correlation between pupil numbers (as a proportion of the school roll) and the cost of tuition indicates the importance of considering additional factors influencing participation across Scotland. This includes (but is not limited to) resource, teaching capacity, class sizes, selection procedures, geographic spread, and availability of instruments, as well as other regional differences. Nonetheless, the cost of tuition should be continually monitored to ensure equity of access, particularly given the introduction of fees and increasing fees in a number of local authorities, and the decline in pupil numbers in 2017/18. Survey results highlight that as a whole, instrumental music services in Scotland are continually improving in terms of monitoring standards, undertaking reviews, and ensuring parent contact time. Moreover, communication between services has been observed to improve year on year, resulting in better information sharing and learning from other instrumental music services. This survey and report is intended to support instrumental music services in Scotland, enabling them to compare provision in other local authority areas, share ideas and innovation whilst monitoring components such as pupil and teacher numbers.

A close-up, artistic photograph of the valves and pistons of a brass instrument, likely a trumpet or trombone. The metal is highly reflective, showing bright highlights and deep shadows. The valves are arranged in a vertical column, with some pistons visible in the foreground and others slightly out of focus in the background. The background is dark, making the metallic parts stand out.

Improvement Service

iHub

Quarrywood Court

Livingston

EH54 6AX

T. 01506 282012

E. info@improvementservice.org.uk

W. www.improvementservice.org.uk

is.
improvement service