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# Instrumental Music Services

Results from the IMS  
Survey 2021





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## Introduction

This 2021 Instrumental Music Survey Report details the results from the ninth annual iteration of this survey. The survey is completed each year by instrumental music leads within all 32 of Scotland's local authorities and includes multiple aspects related to the delivery of these services within Scotland's schools 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 (IMS) and best practice within these services.

The 2021 survey was issued to HITS colleagues in May 2021 and presents results related to the 2020/21 academic year, unless otherwise stated. Results for previous years are included where appropriate, however, as outlined below, 2020/21 has seen major disruption as a result of the Covid-19 pandemic and resulting restrictions imposed within schools. Caution should be taken in comparing with previous years, and the impact of restrictions on pupils should be borne in mind when considering all of these results.

Once again, 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 also be taken when comparing results with previous years. In addition, some figures are estimates and subject to change. Further detail for all data presented in the report is available in the summary tables available on the Improvement Service website.

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 Impact of Covid-19

The 2020/21 academic year has been heavily disrupted by the global Covid-19 pandemic and the associated restrictions placed upon schools and local authorities.

This disruption can be seen throughout the survey, and as mentioned care should be taken in comparing previous years to the results for the most recent academic session.

The most striking impact of Covid-19 restrictions has been the difficulty or even impossibility for instructors to meet pupils face to face, particularly in primary schools. This has meant that many lessons needed to be moved online during the peak phases of the pandemic. As restrictions eased instructors have had to ensure social distancing is followed, lessons are restricted to limited numbers, which in some cases has made group lessons impossible, deep cleaning takes place before and after lesson, and any other guidance is followed. This has created major pressures on instructor time and capacity. Online learning has, however, offered additional flexibility in some cases and is likely to continue to be used as a delivery method in future years. In addition, there are major challenges for pupils in adapting to the new circumstances within IMS, as well as coping with the broader pressures that restrictions have had on the rest of their school and home lives. This all means that the 2020/21 academic year has been unlike any other, and certainly unlike any of the past years where this survey has taken place.



## Charging Policies

Local authorities were asked to provide their tuition fees for the academic year 2020/21 and their proposed fees for the year 2021/22. Since the issuing of this survey, agreement was reached between COSLA and the Scottish Government to remove all fees for instrumental tuition for 2021/22, and so proposed fees for the 2021/22 academic session are no longer applicable and as such are not reported here.

In addition, many local authorities with a charging policy in place did not charge any fees in 2020/21 or did so at a discounted rate. This was usually to support families to deal with the impact that Covid-19 has had on incomes and the cost of living. Therefore, the number of local authorities charging any fees for 2020/21 was just 16, and in many cases at a discounted rate, a drop from 25 in 2019/20. All fees back to 2012/13 are shown in Table 1.

The following changes were made to the fees charged:

- **Aberdeen City** did not charge fees in terms 1 and 2 and had an £80 charge for online lessons in terms 3 and 4 (reduced from usual charges of £242 for group lessons, £280 for paired lessons, and £400 for individual lessons).
- In **Argyll and Bute** fees were reduced from £247.74 to £200 due to Covid-19.
- In **East Lothian** fees increased by £8.80 from £280 to £288.40 (3.1%). Fees were suspended until October 2020 to allow the council to quality assure and implement a blended delivery model between in-person and remote lessons.
- **Inverclyde** increased fees from £120 to £124 (3.3%).
- In **Shetland Islands** no group lessons were delivered, the cost for individual lessons was reduced by £50 from £210 to £160 (24% reduction), and the charge for those receiving lessons remotely fell from £160 to £120 (25% reduction).

- In **Stirling** fees increased by £9 from £276 to £285 (3.3%).
- As a result of Covid-19, in nine local authorities where fees usually apply these were waived or not charged in 2020/21; these were: **Aberdeenshire, East Ayrshire, East Dunbartonshire, Falkirk, Fife, Midlothian, North Ayrshire, South Ayrshire, and South Lanarkshire.**
- In **West Dunbartonshire**, in 2020/21 no instrument hire costs were charged due to Covid-19 (reduced from £100).

Table 1: Instrumental music tuition charges 2012-2021 - 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 Charges were suspended until 5th October 2020 while a blended delivery model was quality assured and established.
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
Angus	£183.00	£192.00	£201 + £30 hire	£210 + £30 hire	£231 + £30 hire	£231 + £30 hire	£231.00	£231.00	£231.00
Argyll & Bute	£138.00	£142.15	£146.40	£150.80	£226.20	£232.98	£239.97	£247.74	£200.00 (reduced due to Covid)
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





Council	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
<b>Eilean Siar</b>	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 are an average of 32 lessons per year, costing £400 pupil per year. Group lessons were £200 per pupil per year.						No charges except for non-SQA guitar and strings pupils. For these instruments a fee of £400 per year applies (32 lessons at £12.50). Group lessons were charged at half rate in 2020/21.		
<b>Falkirk</b>	£44.40 group, £178.20 individual + £20.40 hire	£140.00	£140.00	£140.00	£156.00	£156.00	£154.00	£160.00	No charge due to Covid-19
<b>Fife</b>	£125.00	£125.00	£125.00	£140.00	£180.00	£220.00	£220.00	£220.00	No charge due to Covid-19
<b>Glasgow</b>	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge
<b>Midlothian</b>	£150.00	£160.00	£168.00	£84.00	No charge	No charge	£205.50	£215.34	No charge due to Covid-19
<b>North Ayrshire</b>	£120.00	£140.00	£160.00	£180.00	£180.00	£180.00	£198.00	£198.00	No charge due to Covid-19
<b>Orkney Islands</b>	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge	No charge
<b>Renfrewshire</b>	£150.00	£150.00	£150.00	£150.00	£150.00	No charge	No charge	No charge	No charge
<b>South Ayrshire</b>	No charge	No charge	No charge	No charge	No charge	No charge	£200.00	£200.00	No charge due to Covid-19
<b>South Lanarkshire</b>	£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	No charge due to Covid-19
<b>West Dunbartonshire</b>	No charge	No charge	No charge	No charge	No charge	No charge	No charge (£85 instrument hire)	No charge (£100 instrument hire)	No charge

## Scottish Government Plans

As mentioned, the First Minister set out in the Priorities of Government Statement the intention to remove charges for instrumental music tuition within the first 100 days of government.<sup>1</sup> In July 2021, COSLA and the Scottish Government announced that they had reached agreement to provide more than £7 million of funding to local authorities to remove tuition fees for academic session 2021/22. Therefore, there are no plans by local authorities to have any charges in place in the current (2021/22) academic session, although most local authorities did indicate that they had intended to charge fees prior to the agreement.

A future settlement has yet to be agreed for the years beyond 2021/22. It will be important to ensure that this will adequately provide for any potential increases in demand for services due to either a return to greater levels of “normality” as Covid-19 restrictions ease or from the removal of fees. As shown below, local authorities that did not charge fees in the year prior to the pandemic had seen sustained increases in pupil numbers, while participation had decreased in those local authorities where charges were in place. It would be reasonable, therefore, to expect an increase in demand across Scotland as a result of the removal of all fees. In addition, instructor FTEs have fallen by 5% since 2012/13, meaning there is less capacity to deliver lessons to all interested pupils.

As instrumental music services are discretionary and, unlike a number of local authority service areas, do not have ringfenced minimum spending requirements, they have often been required to make financial savings through reduction in service levels or by introducing charges. Many local authorities have introduced fees in the years that this survey has run and indeed, prior to this year only seven local authorities did not charge any fees for instrumental tuition. Decisions to introduce fees are motivated almost entirely by the severe financial strain that local authorities have been under for several years. These pressures still exist and could become more severe if there is a tightening of public finances to offset last year’s increased spending in response to pandemic.. This means local authorities have continued to explore where savings can be made in IMS provision. In April 2020, for example, City of Edinburgh Council undertook a consultation into making significant budget savings from the instrumental music service budget, including the possibility of introducing charges. While this has been paused due to Covid-19 and the Scottish Government’s announcement, it shows how financial pressures continue to drive decision-making. As the introduction of charges is no longer an option for local authorities, it is important that any future levels of funding do not create an expectation on local authority budgets to meet any shortfalls between demand and provision. If an adequate level of funding is not provided it is possible that music service capacity and provision will have to be cut back and access to services will be reduced, rather than improved.

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1 <https://www.gov.scot/publications/priorities-government-statement-26-2021/>

## Instrument Hiring Policies

Instrumental Music Services often provide instruments to students for hire or loan, with larger instruments such as drumkits available within schools. In many cases, instrument hire is included as part of any tuition fee or is provided free to those in receipt of free school meals or other concession rates. Some local authorities also only charge for hire of specific instruments. Pupils are also generally encouraged to purchase their own instrument after a certain length of time, and in a handful of cases instrument hire is only available for a set period, for example East Lothian offers free hire for two academic years, while East Renfrewshire offers free hire for two terms. For larger and more expensive instruments, East Renfrewshire offers free hire for the duration of the pupil's tuition on the basis that they play in local authority ensembles.

In 2020/21 three local authorities had a fee for instrument hire in place, and in all cases only for certain pupils. 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. Aberdeen City charged an £85 annual hire fee, which did not apply for those sitting SQA exams or in receipt of free school meals. Scottish Borders offered instrument hire as part of their annual fee, but also offer hire at £82 per year for those taking music at S4 and above without their own instrument. West Dunbartonshire Council had previously charged £100 for instrument hire, however this was waived for 2020/21 due to Covid-19.

Perth and Kinross also offer an instrument purchase scheme where pupils can purchase an instrument excluding VAT.

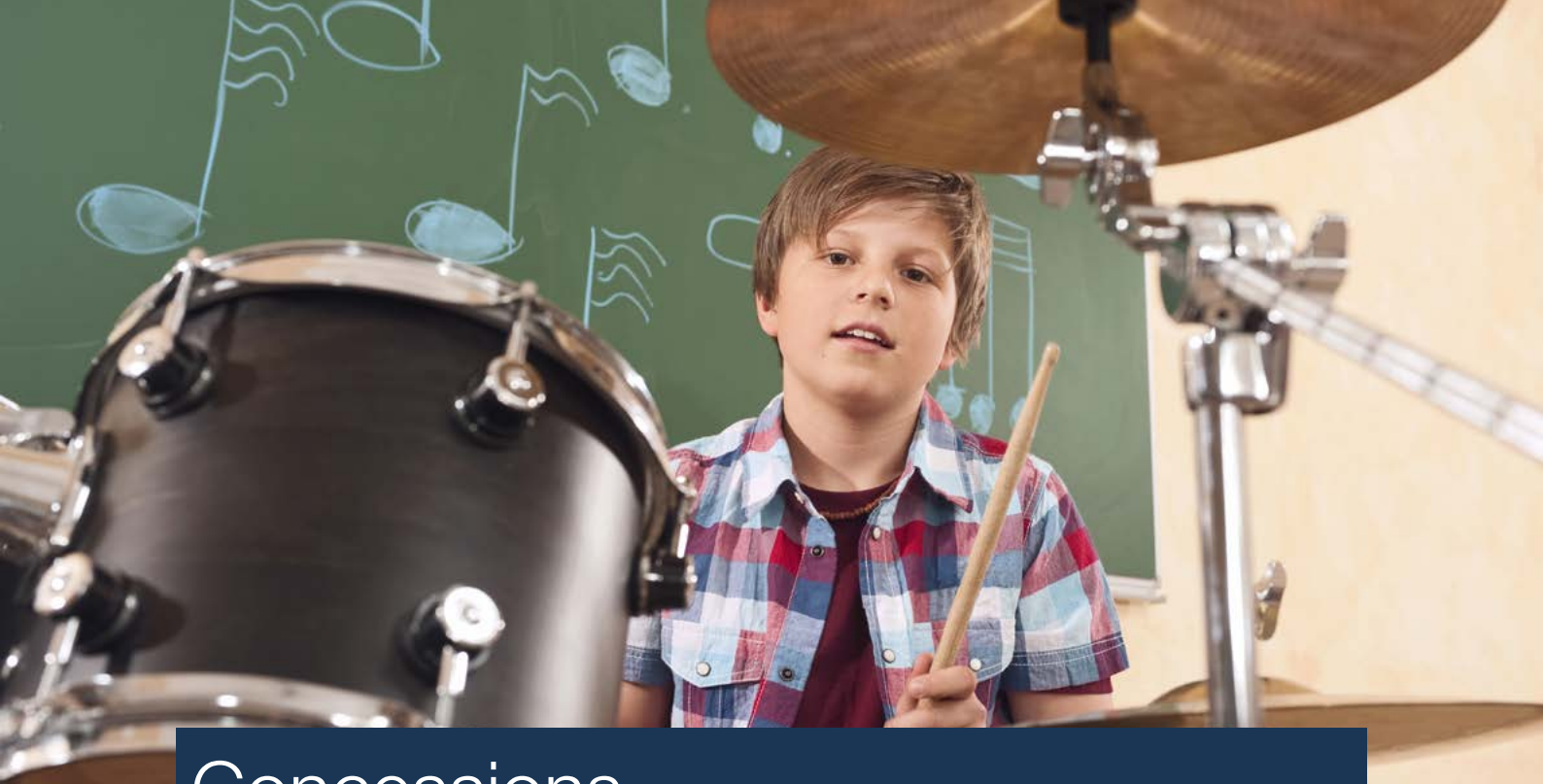
Some local authorities noted that due to Covid-19 no instrument hire was offered to pupils for the 2020/21 academic year.

## Charges for Additional Extra-Curricular Activities

In most years local authorities also offer some additional activities outwith regular tuition. 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. In some cases, these additional activities come with an additional charge, but are often provided without charge and are run through subsidy from the local authority, with IMS staff often volunteering or working overtime to run these activities.

In 2020/21, these additional activities were not run as usual, due to Covid-19 restrictions, and were often delivered remotely. As a result, there were no charges for any additional activities in the 2020/21 session.

It is not yet clear how the Scottish Government decision to remove fees for instrumental music tuition will impact on charges and costs for these additional activities.



# Concessions

All 16 local authorities that charged tuition fees in session 2020/21 offered a range of concessions to pupils. In all cases, as in previous years, SQA music pupils at S4 and above are offered tuition free of charge. In addition, all local authorities offered a concessionary rate for children from families with low incomes, with all children entitled to free school meals (FSM)<sup>2</sup> offered tuition free of charge in all local authorities. These concession policies are in line with COSLA's 'Instrumental Music Tuition Guidance 2019'.<sup>3</sup>

Several local authorities offer additional concessions for children in low income families beyond those claiming FSM. These include:

- **Aberdeen City** – a 50% concession applies for those who receive a Clothing Grant
- **Clackmannanshire** – a £117.50 rate (a roughly 77% reduction) applied for pupils whose family were in receipt of housing benefit, income support, or universal credit.
- **East Lothian** – no charge applied for looked after children and a concessionary rate of 70% (£202) applied for children in households with a total taxable income of less than £26,884.
- **Inverclyde** – all pupils whose parents are in receipt of state benefits receive a 100% discount.

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2 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.

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)

- **Perth and Kinross** - Pupils new to IMS in 2020/21 who are not eligible for FSMs but are in receipt of an occupied council tax reduction based on household income receive an exemption.
- **Stirling** – a discounted rate of £70 per term applies for families in receipt of housing benefit, universal credit (income less than £1,350 per month), council tax reduction/benefit or education maintenance allowance.

In ten local authorities a full exemption is provided for those in receipt of a Clothing Grant, these are **Angus, Dumfries and Galloway, East Lothian, Inverclyde, Moray, North Lanarkshire, Scottish Borders, Shetland Islands, Stirling,** and **West Lothian.**

As mentioned above, several local authorities waived fees completely or reduced the level of fees charged in order to help families cope with the financial pressures brought on by Covid-19. Many of these local authorities have previously had concessions policies in place for those in low income households. These policies are not detailed here as they did not apply for the previous academic session and will not apply for session 2021/22, due to the decision to remove all fees.

There were also several other concessions in place outwith SQA, FSM entitlement, and low-income. One of the most common concession categories was for those with a sibling undertaking instrumental music tuition. The following local authorities applied concessions for those pupils with a sibling within the instrumental music service:

- **Aberdeen City** – for second siblings and above a 50% discount was applied for tuition on one instrument only.
- **Angus** – a sliding scale applied for all children learning an instrument, with a second sibling incurring a fee of £184.80 (20% discount), and third and subsequent siblings charged at £138.60 (40% discount).
- **Dumfries and Galloway** – third and subsequent siblings paid no fees.
- **East Lothian** - siblings within household paying a full fee were charged £247.20 (14.3% discount against first sibling), while siblings within households receiving a concession were charged £173.04 (14.3% discount against first sibling).
- **East Renfrewshire** – a 25% sibling discount applied (£225)
- **North Lanarkshire** – where one sibling paid a full fee all other siblings received a 50% reduction in fees (£75).
- **Scottish Borders** – third and subsequent siblings received a 100% fee reduction.
- **West Lothian** – a sibling discount of 50% applied (£177).

Due to the removal of fees in nine local authorities where charges usually applied, there were fewer other discounts or concessions in place compared to previous years. These other concessions included:

- **Argyll and Bute** - The scheme offering a 50% subsidy to piping pupils provided by Argyll Piping Trust was extended to include piping pupils from across Argyll

and Bute. 50% subsidy from Kintyre Piping Trust for pipe band drumming pupils in Kintyre only to give parity with the piping pupils.

- **East Lothian** – no fees applied for looked after children
- **Inverclyde** – fees did not apply for Primary School pupils; a £20 discount was applied to new starts to allow for a free trial period
- **North Lanarkshire** – pupils with additional support needs did not pay tuition fees; a 50% reduction in fees applied for second and subsequent instruments.
- **Scottish Borders** – a £50 discount rate for the first year of fees applied for new starts

## Percentage Receiving Concessions

Of the 41,594 pupils who participated in instrumental music lessons provided by local authorities in 2020/21, 3865 received a concession of some sort within the 16 local authorities where fees were charged. This was just over 26.5% of pupils within these areas. These numbers were a significant drop in both absolute numbers and percentage terms compared to 2019/20 when over 13,000 pupils and 35.6% of pupils received a concession. However, as the number of local authorities charging for tuition was significantly lower, and given the large drop in pupil numbers, care should be taken in comparing these numbers.

The proportion of pupils receiving a concession ranged from 62% to 15%. The most common exemption type applied was an exemption for SQA pupils, which applied to over 1700 pupils, followed by free school meal exemptions at 731 pupils. The number of exemptions for 15 local authorities where fees applied in 2020/21 are displayed in Table 2. Please note this data could not be supplied by North Lanarkshire.

**Table 2: Number of IMS pupils who received concessions/exemptions – n.b. councils without charges are not included**

	No. IMS pupils 2020/21	No. of IMS pupils who received concessions/ exemptions in 2020/21	Total no. and % of IMS pupils who received concessions/ exemptions 2020/21
<b>Aberdeen City</b>	1431	149 SQA Music Pupils 45 FSM/Clothing Grant 67 Sibling Discount	261 (18%)
<b>Angus</b>	696	89 SQA Music Pupils 95 FSM/Clothing Grant 50 Sibling Discount 18 Other (income)	252 (36%)
<b>Argyll &amp; Bute</b>	534	35 FMS	93 (17%)
<b>Clackmannanshire</b>	303	177 SQA Music Pupils 8 FSM 3 Other	188 (62%)

	No. IMS pupils 2020/21	No. of IMS pupils who received concessions/ exemptions in 2020/21	Total no. and % of IMS pupils who received concessions/ exemptions 2020/21
Dumfries & Galloway	537	96 SQA Music Pupils 50 FSM/Clothing Grant 2 Sibling Discount	148 (28%)
East Lothian	857	77 SQA Music Pupils 56 FSM 57 Sibling Discount 51 Other (Looked After and Universal Credit)	281 (33%)
East Renfrewshire	904	280 SQA Music Pupils 27 FSM 67 Sibling Discount	374 (41%)
Highland	2530	488	488 (19%)
Inverclyde	1104	220 SQA Music Pupils 67 FSM 397 Other (Primary School)	684 (62%)
Moray	536	53 SQA Music Pupils 44 FSM/Clothing Grant	97 (18%)
Perth & Kinross	804	91 SQA Music Pupils 30 FSM	121 (15%)
Scottish Borders	686	54 FSM	108 (16%)
Shetland Islands	646	47 SQA Music Pupils 55 FSM/Clothing Grant	102 (16%)
Stirling	648	181 SQA Music Pupils 43 FSM/Clothing Grant	224 (25%)
West Lothian	1068	151 SQA Music Pupils 139 FSM/Clothing Grant 100 Sibling Discount	390 (37%)

## Free School Meals

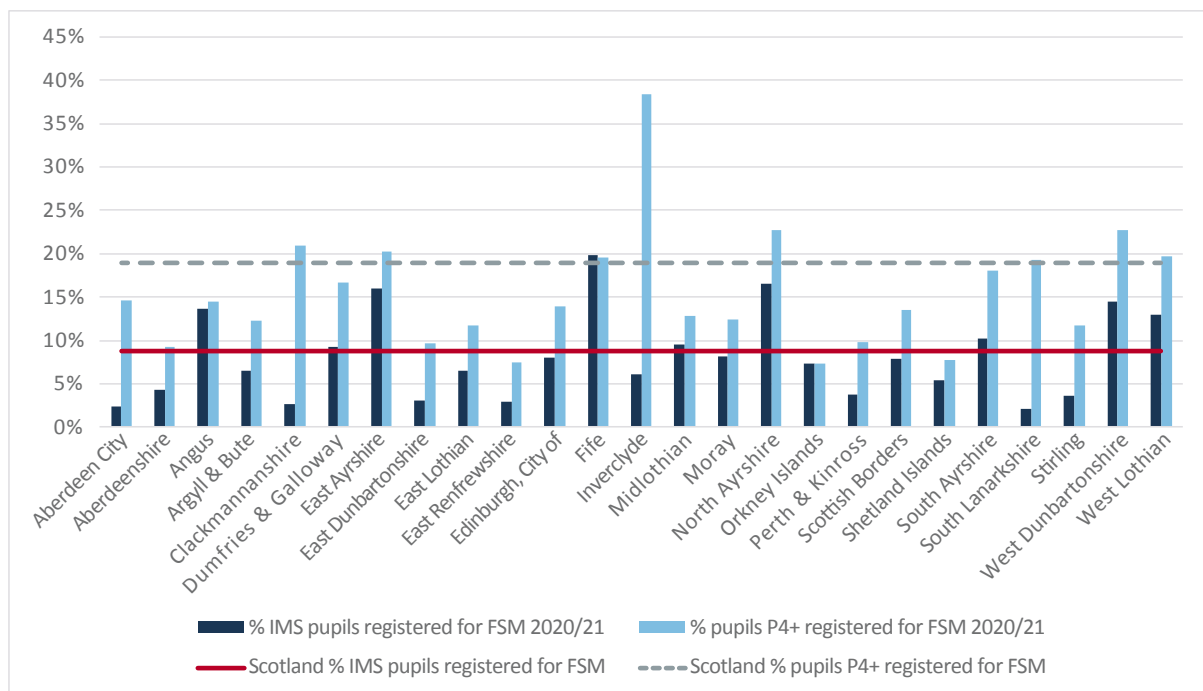
Free school meals (FSM) are offered to all pupils in Primary 1-3 and to pupils in P4-7 and in secondary school where parents or guardians are in receipt of a range of qualifying benefits. Agreement between local authorities and the Scottish Government has now been reached to expand FSM entitlement to all P4 and P5 pupils in session 2021/22, however, as all tuition fees have also been removed this will not affect the data collected in this survey. Pupils eligible for FSM currently do not pay any tuition fees in any local authority. In session 2020/21 a total of 100,139 pupils in Primary 4 and above received FSM, 18.9%, of the P4+ school roll. Where data was available, 2154 pupils were in receipt of FSM within instrumental music services in 2020/21. This was 5.2% of the 41,594 IMS pupils in all local authorities and 8.2% of pupils within local authorities that charged fees in 2020/21. These figures would suggest that pupils registered for FSM are underrepresented within instrumental music 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 participating in tuition. 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. In future years, as fees will no longer apply it will be interesting to continue to collect this data and track whether this change has an impact on the number and proportion of FSM eligible pupils participating in instrumental music tuition.

At an individual local authority IMS level, where figures for FSM registered and eligible pupils were provided, the proportion registered for FSM ranged from 2.1% to 19.8%. Figure 1 displays the variation between local authorities in proportions of IMS pupils that are registered and eligible for FSM and compares with the total proportion of P4+ pupils registered for FSM in each local authority. Again, care should be taken in using these figures, as not all local authorities were able to provide accurate figures for the reasons outlined above.

For the second year, 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 instrumental music tuition. Proportions ranged from 0.03% to 17.5%. Full details are included within the 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

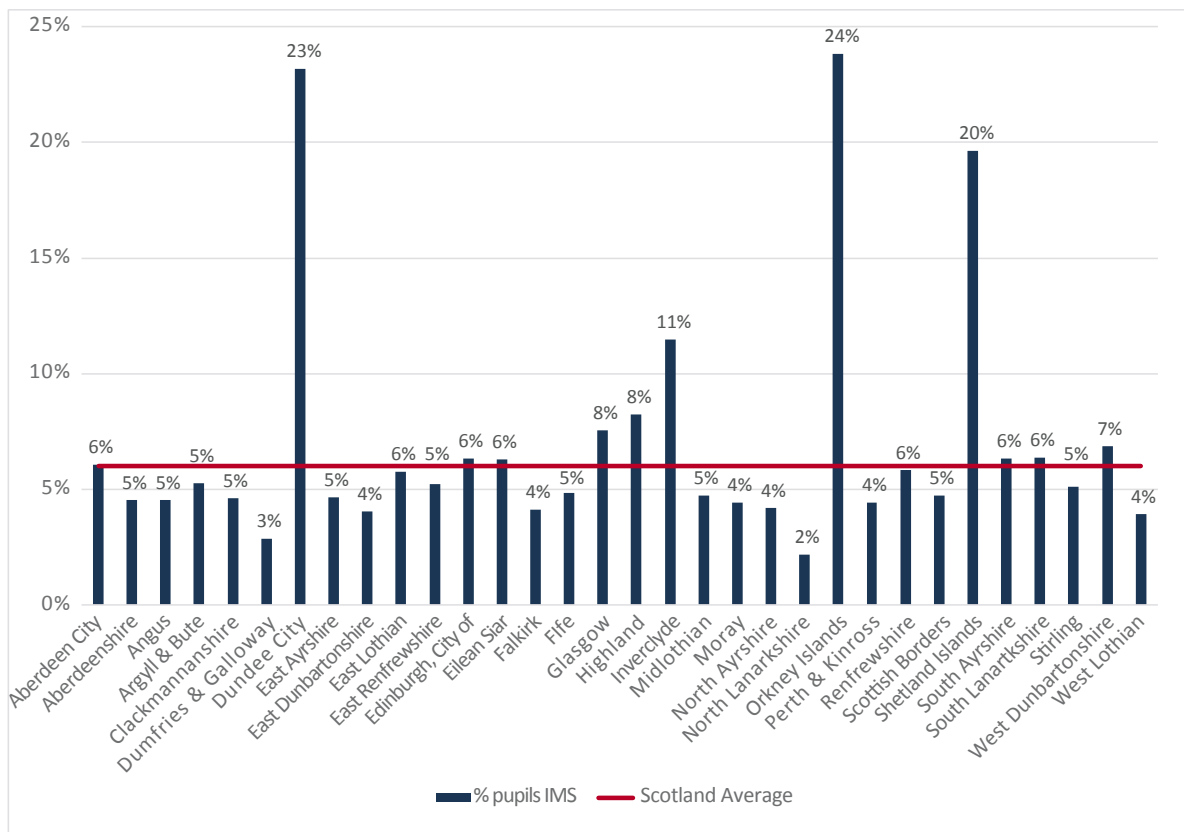
In 2020/21 41,594 pupils participated in instrumental music tuition provided by local authorities. This represents a very large decrease of 14,604 pupils (26%) from the total number in 2019/20 and demonstrates the hugely disruptive impact that Covid-19 restrictions have had on these services.

Local authorities highlighted several reasons for this fall. In most cases, recruitment of new pupils was difficult or impossible, with entry by instructors to primary schools heavily restricted and the opportunities for new pupils to trial instruments severely limited. In some local authorities, new recruitment was possible, but took place online, for example East Lothian carried out recruitment through their YouTube channel and East Ayrshire offered places via a Digital Kickstart. Other local authorities highlighted limits on recruitment in certain aerosol producing instruments such as brass, woodwind, and voice. Additionally, in some cases recruitment was not possible due to the additional pressures on instructor capacity. This was caused by a move to online lesson delivery, which often meant that larger group lessons could not be delivered, as well as additional requirements such as cleaning of practice areas.

As well as limited recruitment, local authorities also reported higher rates of pupils dropping out of the service and lower levels of engagement. In Inverclyde, for example, almost 400 learners disengaged with the service in 2020/21, almost a third of the pupil numbers in that local authority. A number of reasons appear to have contributed to pupils disengaging with services including a move to online learning, which some pupils appear to have struggled with; an absence of live playing and group activities like concerts, bands, and orchestras; and more generally the impact that the pandemic has had on young people's mental health, with increased levels of stress and anxiety reported. When combined with the limits on pupil recruitment, the pressures on engagement caused by the pandemic have significantly impacted pupil numbers.

On an individual local authority level, the proportion of pupils participating in instrumental music tuition varies widely, from 2% up to 24% of all primary and secondary school pupils. These figures are shown in Figure 2. In only two local authorities, Dundee City and Orkney Islands, did the proportion of pupils participating in instrumental music tuition increase between 2019/20 and 2020/21. On average, participation rates were down by two percentage points across local authorities. Eilean Siar was most affected with a 5.7 percentage point decrease in participation rate, followed by a 4.7 percentage point decrease in Argyll and Bute.

**Figure 2: Proportion of pupils taking instrumental music lessons 2020/21**



The number of pupils per local authority from 2012/13 to 2020/21 is shown below in Table 3. Only three local authorities, Dundee City, Orkney Islands, and Clackmannanshire, saw an increase in pupil numbers between 2019/20 and 2020/21. All three of these areas had seen a decrease in pupil numbers in 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	2020/21
Aberdeen City	2760	2642	2255	2500	3371	3300	1700	2224	1431
Aberdeenshire	3389	3025	2955	2576	3060	3171	2965	2888	1636
Angus	1500	1200	1434	1146	932	954	Approx. 950	1052	696
Argyll & Bute	1258	1435	1334	1226	1141	1056	1185	1017	534
Clackmannanshire	432	448	345	444	392	432	309	299	303
Dumfries & Galloway	1210	1317	1552	1294	1166	809	750	735	537
Dundee City	2200	2669	2938	3538	3677	3793	3987	3619	4181
East Ayrshire	1147	783	823	1002	1242	1194	1214	976	738
East Dunbartonshire	1301	1600	1410	1586	1382	1191	1226	1147	691
East Lothian	1284	1318	1327	1331	1341	1245	1119	1022	857
East Renfrewshire	1942	1938	1904	2010	1732	1596	1705	1648	904
Edinburgh, City of	4758	4912	5215	5100	5089	5084	5089	5071	3245
Eilean Siar	360	500	500	766	2323 (inc. Gaelic Singing) 540 (excl. Gaelic Singing)	1898 (inc. Gaelic singing), 868 (excl. Gaelic singing)	496	400	210
Falkirk	1142	965	1376	1950	2057	1854	1925	1852	892
Fife	3494	3161	3332	4415	4434	3365	3645	3232	2431
Glasgow	4538	4551	4573	4597	4919	5448	5876	6300	5225
Highland	3100	3200	3400	3450	3100	2900	3600	3700	2530
Inverclyde	1015	1350	1677	1388	958	1298 (inc. 161 withdrawn)	1297	1326	1104
Midlothian	1100	1100	1221	1312	1302	1321 (426 received instruction in 2 instruments)	994	924	633
Moray	850	850	893	910	815	800	594	643	536

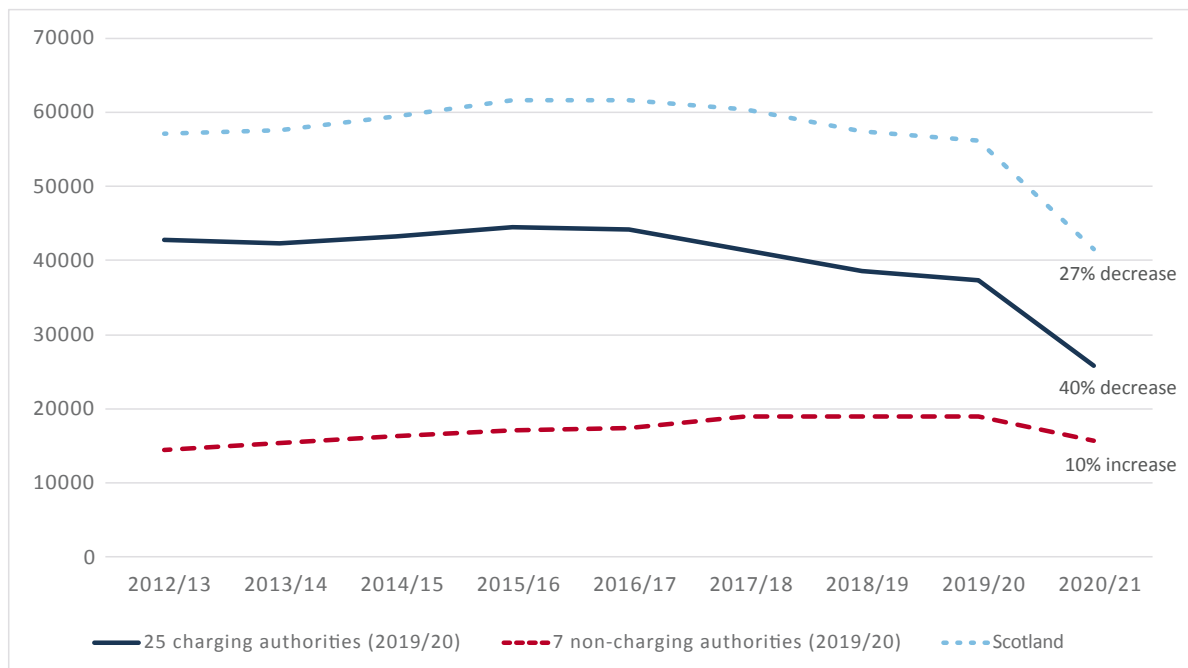
	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
North Ayrshire	1570	1627	1554	1487	1555	1432	1304	1184	750
North Lanarkshire	3853	3670	3685	3599	3409	2941	2646	2437	1048
Orkney Islands	498	500	531	581	646	663	695	646	668
Perth & Kinross	1590	1605	1690	1711	1762	1716	1564	1359	804
Renfrewshire	1050	1280	1534	1546	1532	1949	1981	1945	1369
Scottish Borders	716	862	895	995	906	907	878	848	686
Shetland Islands	662	561	570	724	721	722	779	712	646
South Ayrshire	1222	1319	1240	1126	1266	1197	1133	1125	899
South Lanarkshire	2957	3029	3035	3050	2990	2900	2850	2850	2850
Stirling	810	844	844	898	950	940	1030	989	648
West Dunbartonshire	964	891	941	926	1034	1102	813	897	844
West Lothian	2448	2395	2468	2397	2194	2178	1197	1131	1068
Scotland	57120	57547	59451	61581	61615	60326	57496	56198	41594

In this 2020/21 survey local authorities were asked to provide pupil numbers per instrument. Amongst the 29 local authorities that were able to provide this information, string instruments were by far the most commonly played, accounting for over a quarter of all pupils. This was followed by woodwind, brass, and guitar. At a local authority level, strings were the most commonly taught instrument in 18 areas, with some variation in numbers. In Shetland Islands, for example, traditional instruments, such as clarsach, were the most commonly played. Full details of the number of pupils by instrument within each local authority are included within the summary tables.

Since 2012/13 there have been differing trends in participation of pupils in IMS between those who charged in 2019/20 and those who did not. This trend has continued despite the huge disruption seen in 2020/21. For the seven local authorities who had not charged prior to Covid-19 there has been a 10% increase in pupil numbers since 2012/13, while the remaining twenty-five local authorities saw a 40% decrease over the same period. Across all 32 local authorities pupil numbers were 27% lower. The last year has seen a very large decrease for almost all local authorities. As with the longer time period, those authorities with charges in place pre-Covid saw a greater decline in pupil numbers. The change between 2019/20 and 2020/21 was 26% across all local authorities, around 31% in charging authorities, and “only” 17% in authorities where there were no charges. It should be noted that the local authorities in each of these groups have changed over time and that 9 of the 25 local authorities with charges prior to the pandemic did not charge fees in 2020/21. These changes are displayed in Figure 3 below.

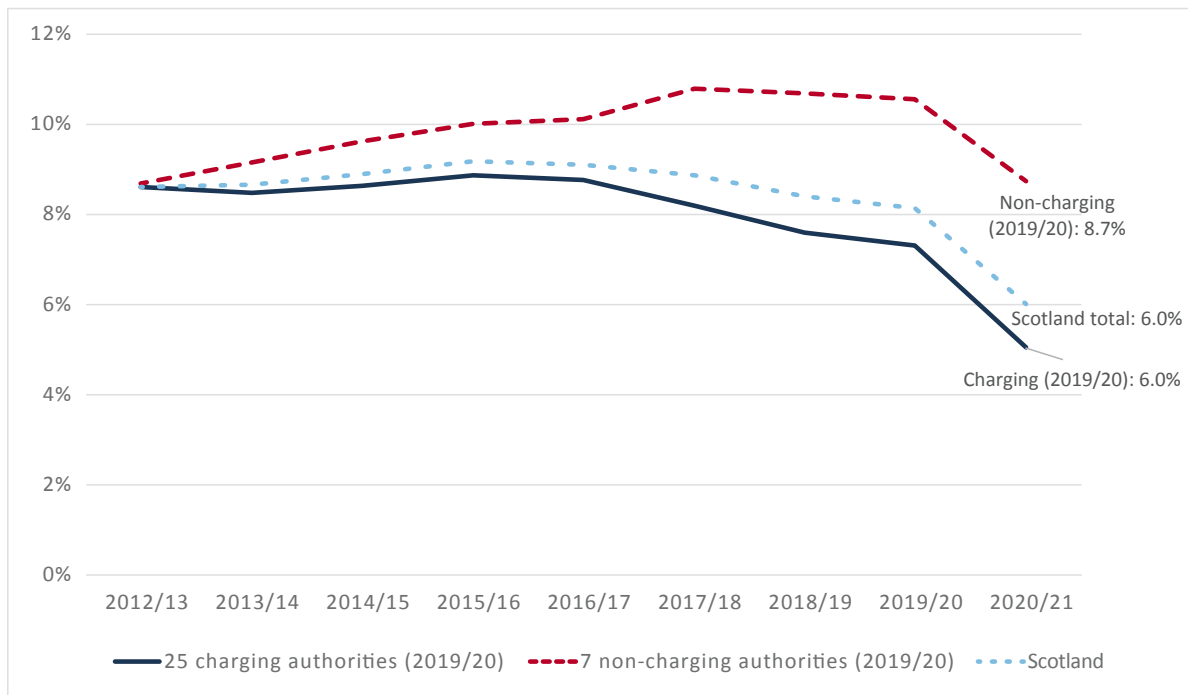
As all tuition fees have now been removed, it remains to be seen what the impact on pupil numbers and demand for instrumental music services will be. Evidence from past years, and even in this most recent Covid-disrupted year, suggests that pupil numbers are very likely to increase, and indeed it seems likely that pupil numbers will rebound strongly to pre-Covid levels in any case. This means that the Scottish Government will need to ensure that services receive an adequate level of finance to meet any additional demand.

**Figure 3: IMS pupil number changes - 2012/13 to 2020/21 (local authorities grouped by charging status in 2019/20, that is pre-Covid)**



Participation rates have also differed since the beginning of the Instrumental Music Survey, with higher rates of participation in those authorities without charges prior to Covid-19. Even with the very large drop over the last year, these local authorities have slightly higher participation rates than they did in 2012/13. On the other hand, those local authorities with charges in 2019/20 have a lower participation rate, possibly due to the fact that several had no, or far lower, fees in place in 2012/13. Across Scotland, participation fell from 8.6% in 2012/13 to 8.1% in 2019/20 and down to 6% in 2020/21. The last year has seen sharp declines in participation rates for both pre-Covid non-charging and charging local authorities, but the decline was slightly higher in those with fees prior to the pandemic at 2.3 percentage points compared to 1.8. As mentioned above, the drop in participation rates could be a result of a number of factors including difficulties in recruiting any new pupils. These figures are displayed in Figure 4.

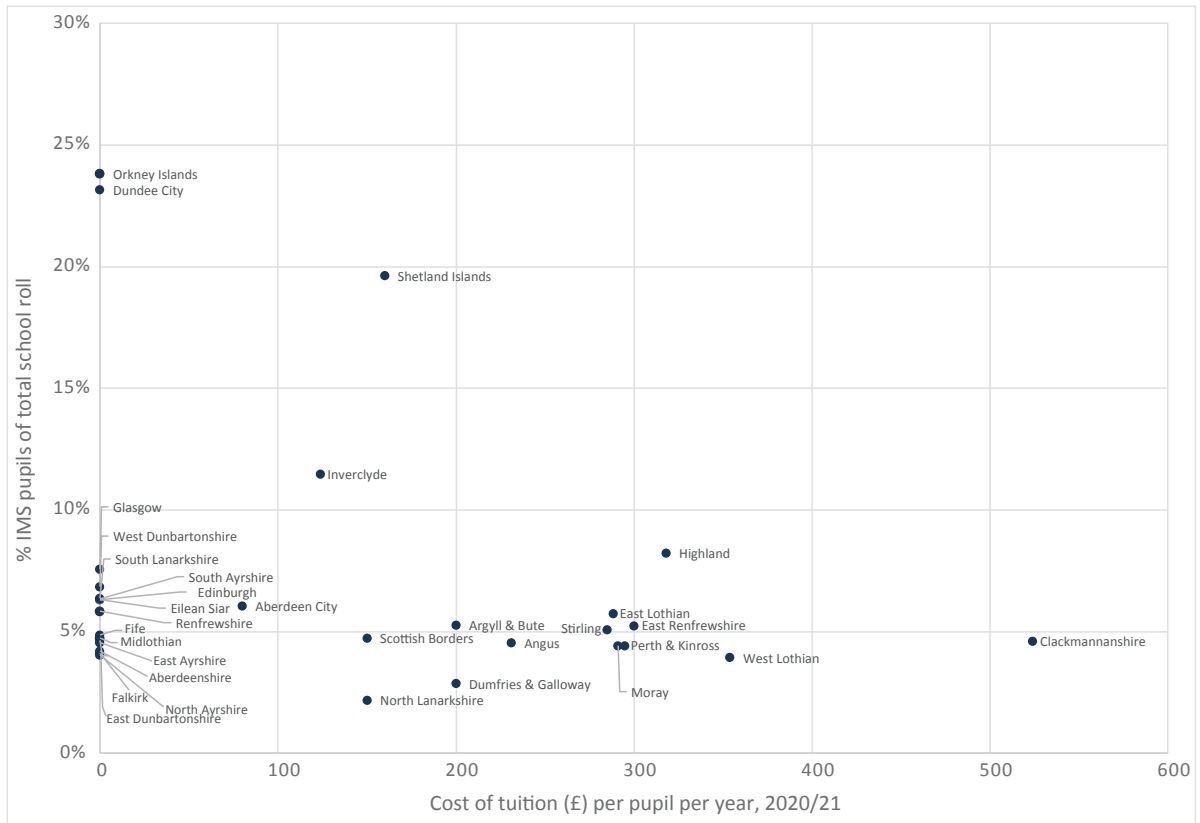
**Figure 4 - Percentage of Pupils Participating in IMS, 2012/13 to 2020/21 (local authorities grouped by charging status in 2019/20, that is pre-Covid)**



In this year's survey there does not appear to be any relationship between the level of fees charged in local authorities and participation rates. This may be partly due to a general fall in pupil participation rates, a lack of new recruitment, as well as the decision not to charge fees in nine local authority areas where fees had previously applied.

Although no relationship can be seen, two local authorities without fees, Dundee City and Orkney Islands, continue to have by far the highest rates of participation. There may be several factors that explain variation in participation rates at a local authority level, including tutor capacity, and Shetland Islands, for example, continue to have very high participation rates, despite charging fees. Local authority fees and participation rates are displayed in Figure 5.

Figure 5 - Percentage of All Pupils Participating in IMS by Cost of Tuition, 2020/21







## Selection Procedures

As in previous years, and despite the reduction in pupil numbers and limits on recruitment in 2020/21, demand for instrumental music services is higher than the number of available places. Only five local authorities were able to provide places for all pupils in 2020/21. This was similar to previous years, however some local authorities did not recruit any new pupils, meaning that this question did not apply. Some of the local authorities that could provide places to all mentioned that this was only possible due to the lack of recruitment. Others, however, said that the pandemic made it more difficult to provide for all interested pupils. Some of the restrictions that have reduced capacity include limits to the number able to participate in group sessions, remote teaching, some periods of pupils or year groups self-isolating, a lack of access to technology amongst both staff and pupils, outdoor tuition, difficulty in finding suitable indoor space for lessons as practice spaces are required to be larger in some cases, restrictions placed on travel, the time between lessons for aerosol particle dispersion, and time for the cleaning of teaching areas.

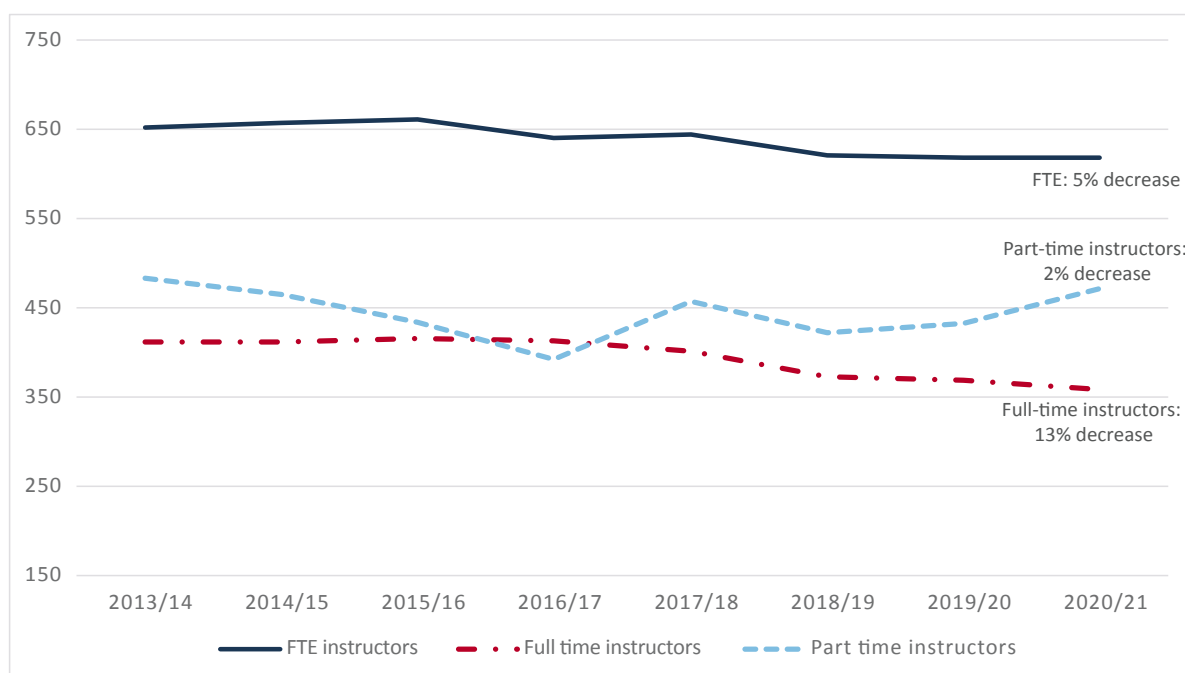
Regardless of the impact of the pandemic, very few local authorities are able to provide for all interested pupils and therefore have to operate waiting lists. In Renfrewshire, for example, it is estimated that around one in three interested pupils can be offered tuition. Limited teaching capacity is the main factor behind this, with a significant fall in FTE instructors across Scotland from 651.9 FTE in 2013/14 to around 617.5 in 2020/21. Meanwhile, as discussed in more detail below, the number of full-time instructors has seen a sustained fall over this period and is now around 13% lower than in 2013/14, while part-time instructor numbers have also reduced by around 2% despite an increase in recent years. Some local authorities have shortfalls in particular areas, such as woodwind and strings. While instructor FTE numbers have fallen, the number of pupils in primary and secondary schools between 2013 and 2020 has risen by 4%,<sup>4</sup>

<sup>4</sup> *Pupil census: supplementary statistics*, April 2021: <https://www.gov.scot/publications/pupil-census-supplementary-statistics/>

which demonstrates the difficulty in providing for the increase in demand this has caused as capacity is reducing. The trend in instructor numbers is shown in Figure 6.

In some local authorities, the introduction of charges for instrumental music tuition has both served to somewhat reduce demand, but has also been required to allow these services to be sustainable in the face of reducing local authority budgets. The decision to remove fees will therefore remove this option. As shown above, local authorities without fees for lessons tend to have higher participation rates, and it seems likely that demand for these services will rise as a result of this decision. What is also clear, however, is that local authorities are already unable to meet demand even where fees are in place. As a result, and assuming that one of the goals for removing fees is to increase participation, consideration will need to be given as to the level of funding required to not only meet existing capacity, but work towards building capacity back to historic levels.

**Figure 6: Instructor numbers and FTE**



As a result of this oversubscription, several local authorities operate some form of selection procedure, at least for their most popular instruments. 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. Following these tests some pupils are then placed on a waiting list. In areas without selection procedures, waiting lists are often compiled on a first-come-first-served basis. 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 to make sure that both pupils and families are happy with their choices. In some local authority 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, although in some areas there are no age restrictions and lessons may begin in Primary 1 or 2. In most local authorities only certain instruments are offered in primary school 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 is generally offered 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 service capacity, 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 one third 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 23 minutes tuition per instrument per week, but lessons range from a minimum of 10 minutes to a maximum of 50 minutes. Generally, lessons last half of a 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. Covid-19 restrictions have

had some impact here and have often reduced the length of lessons, especially as more lessons were moved online and additional cleaning or space requirements have been put in place.

Local authorities also vary in the size of their group lessons. Most local authorities allow individual lessons and lessons are sometimes taught in small groups. Covid-19 restrictions have meant that many local authorities were only able to offer individual lessons or could only offer group lessons for certain instruments and to pupils from within the same class bubbles. In many cases, larger groups, such as class bands, could not run at all. On average, the maximum group size amongst local authorities is seven pupils, a reduction from 2019/20. Pupils on average receive as a minimum 30 weeks of lessons per year, but the service guaranteed minimum varies across local authorities. In most cases, lessons were delivered online to meet this requirement, but not all pupils were willing to participate in online lessons. 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.

Notwithstanding the impact of Covid-19 and move to online delivery, these policies have not changed substantially from previous years. Further details of these policies can be found in the summary tables.



## Revenue and Budget Allocations

In 2020/21, 30 local authorities were able to provide figures for the costs of running their services and revenues raised from tuition fees and other sources. The total running cost of these services was £30,175,423. Including only the 30 local authorities that provided figures for both 2019/20 and 2020/21 this was an increase of 4.3%. In real terms, that is accounting for inflation, this works out as a 2.2% cut. Of the 30 local authorities that provided data for both years, 17 reported an increase in operating costs in cash terms, with an average increase across all local authorities of 3.2%. This was around half the rate of inflation over the same period.<sup>5</sup> The range of changes was relatively wide with the highest increase at 42% and the largest fall 27%.

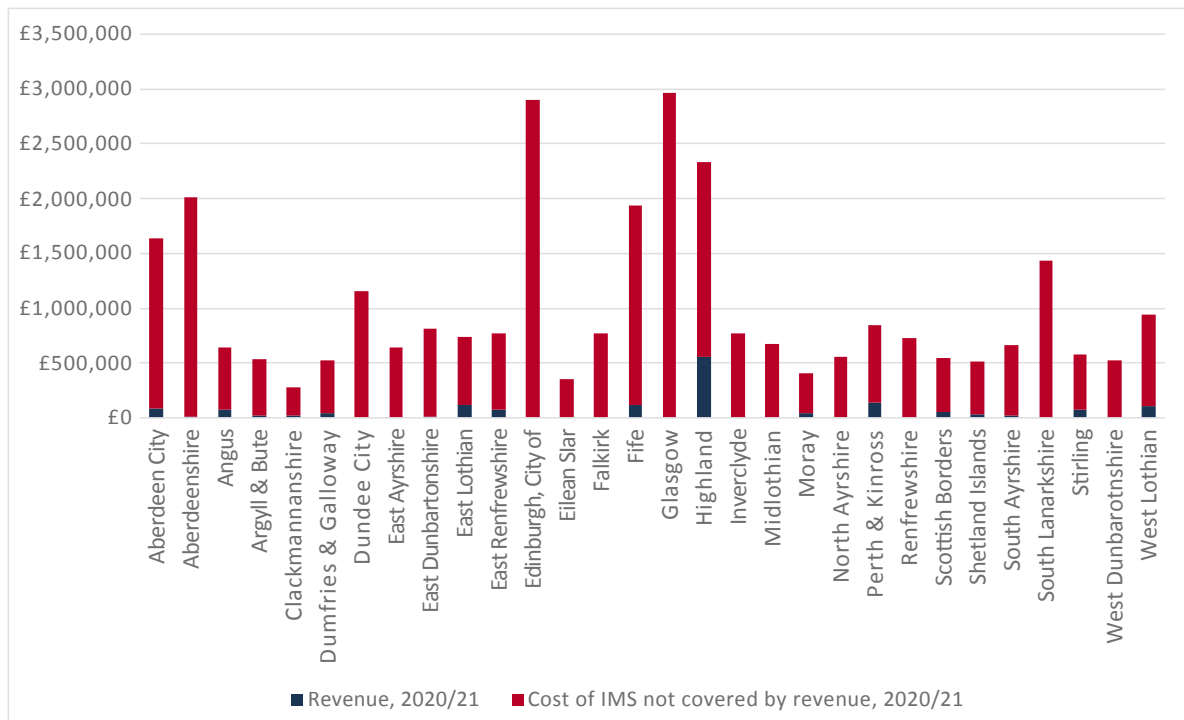
Local authorities with charges in place cover some of these costs through the revenues raised by these fees. This year, as a result of Covid-19 restrictions and the fall in pupil numbers, as well as the decision by several local authorities to reduce or waive fees, revenue was very low compared to previous years. Tuition fees in 2020/21 raised a total of £1,608,085 compared to £4,613,375 in 2019/20. Including only those local authorities where data was provided in both years there was a 64% decrease in income from fees. Income raised from fees ranged from just 0.3% of running costs to 23.2%. Figure 7 shows the split in cost covered by tuition fees and the total provided by the local authority or other sources. On average, fees in 2020/21 covered 10.2% of the cost of running services in local authorities with charges in place, less than half of the proportion (20.9%) in 2019/20. In total, the revenue from fees accounted for 5% of the running cost of these service across all local authorities and 13% in those where fees were charged in 2020/21.<sup>6</sup> Both of these proportions were significantly lower than in 2019/20.

5 GDP Deflators, September 2021 - <https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-september-2021-quarterly-national-accounts>

6 Among local authorities where data was provided:  
Revenue from tuition fees: £1,608,085  
Gross total cost: £30,239,571  
Gross total cost, charging authorities only: £12,115,407

It should be noted that no local authority in this year or in previous years comes close to covering the full running cost of their service through tuition fees. Therefore, future models for funding IMS based on simply replacing existing revenue streams from tuition fees will see services continue to receive the vast majority of their resources from strained local authority budgets.

**Figure 7: Revenue from tuition fees and the total cost of IMS, 2020/21**



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. Many local authorities reported that private sponsorship income was also much lower than in previous years, due to Covid-19. Details of these arrangements are available in the 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 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 2020/21. A breakdown of FTE instructors within each local authority in 2020/21 is available in the Summary Tables.

**Table 4: Instructor FTE by discipline, 2013/14 - 2020/21**

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21 <sup>7</sup>
Strings	180.3	175.3	174	168.2	166.46	162.03	159.63	156.414
Woodwind	124.5	123.3	123.5	119.6	122.22	114.61	112.57	107.56
Brass	120.8	125.2	123.1	119.8	118.05	111.82	111.46	104.72
Percussion/ Drum Kit	64.4	62.2	64.4	64.7	64.87	64.56	65.16	57.56
Guitar	56.8	60.6	61.1	58.9	58.94	59.57	58.57	56.47
Traditional Instruments (exc. Piping & Highland Drumming)			9.3	7.5	6.51	7.07	8.07	7.67
Bagpipes/ Chanter			33.1	34.8	37.1	38	37.3	38.2

<sup>7</sup> Please note – not all local authorities could provide this data in 2020/21, and missing values have been filled forward from 2019/20

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21 <sup>7</sup>
Highland Drumming			4.6	5.1	4.7	8.6	8.6	9.5
Traditional Instruments (inc. Piping & Highland Drumming)	37.5	46.5	47	47.4	48.31	53.67	53.97	55.37
Voice	17.8	19.3	21.5	27.4	20.38	21.34	21.88	24.28
Piano/Keyboard	43.6	41.8	43.7	41.3	42.59	35.85	34.24	34.74
Other: (please specify)	4.8	2.4	7.3	6	6.6	8.86	8.4	6.83

As discussed above, local authority teaching capacity for instrumental music tuition has been under pressure for several years. FTE numbers saw a large decrease in 2018/19 and have continued to slowly decline since then. In 2020/21 FTE numbers were again the lowest recorded in any iteration of this survey. In addition, the number of instructors employed full-time has continued to drop, which has been accompanied in this year's results by a large increase in instructors working part-time. This trend may have been driven in part by shifting work and service delivery patterns as a result of Covid-19. If pupil numbers rise in 2021/22, particularly as fees are removed, an increase in instructor FTEs may be required to meet this. The full breakdown is displayed in Table 5.

**Table 5: Total instructor numbers 2013/14 - 2020/21**

	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21 <sup>8</sup>
FTE	651.9	657.2	660.3	640.6	644.14	619.98	617.8	617.477
Full-Time	412	411	415	413	401	373	368	357
Part-Time	483	465	433	392	457.4	422.12	432.64	472.44

<sup>8</sup> Please note – not all local authorities could provide this data in 2020/21, and missing values have been filled forward from 2019/20





## 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 summary tables.

In the past, local authorities have had a range of policies and procedures for reviewing and changing charges and fees for tuition. In the future this will not be required, as the Scottish Government has agreed to remove fees. There are, however, ongoing reviews in how services operate and are delivered going forward. These seek to ensure that services operate effectively and provide an inclusive service for all. Some examples of reviewing policies and activities include:

- In several local authorities fees were suspended for the later part of 2019/20 and 2020/21 as a response to Covid-19. Some local authorities, including **South Ayrshire** and **South Lanarkshire**, had also intended to suspend fees for 2021/22 prior to the Scottish Government decision to remove all fees.
- **Aberdeenshire** - A review of the IMS is currently taking place. In June 2021 the Head of Communities, Wellbeing and Partnerships replaced the Head of Education in overseeing the IMS. However, the IMS remains in Education for the purpose of delivery. The move is part of the review and re-design of the Service.
- **Argyll and Bute** - Piping charges were inequitable across Argyll and Bute. This has been resolved by working closely with the Argyll Piping Trust to increase sponsorship therefore all pipers now pay the same charge. Whilst the pipers are equitable, the musicians are not with all other instrumentalists paying full cost.
- **City of Edinburgh** have approved a permanent budget saving of £500k for IMS to be achieved over 3 years with an agreement that parents, carers, schools and staff would be consulted in 2020/21. Lockdown meant this consultation was

paused and the budget saving remains to be achieved in 2021/22 and 2022/23. It was envisaged that following consultation charging would commence later in 2021/22 with an in-year income target of £150,000 and that this would increase by £350,000 to achieve the full year effect of £500,000 in 2022/23. With the Scottish Government's announcement that all music tuition charges would be abolished, the consultation has remained on pause until the outcome and compensation for non-charging authorities was agreed. This saving of £500k remains within the council's budget and a pressure cannot be created for Edinburgh by the removal of charges if not matched with compensation equal to the approved saving.

- **Midlothian Council** will be doing a complete review of the instrumental music service in the coming academic year, 2021/22. All charging and concession policies were due to be reviewed prior to the decision to remove fees
- **South Ayrshire** - Data/information is gathered on numbers receiving instrumental instruction across schools within the authority. This gives a clear picture of uptake and opportunity and information about any trends or patterns that may develop. This information is used to monitor uptake particularly across SIMD areas allowing the local authority to plan ahead to support equity and opportunity. In addition, the collective management of Instrumental Instruction, YMI provision and primary music specialist provision ensures the best possible opportunities for young people across the authority.

In 2019/20 and 2020/21 there were additional efforts to consider how services are delivered in response to Covid-19 restrictions, including the changes to fees mentioned. These actions were based on guidance provided by the Scottish Government, Education Scotland, the Music Education Partnership Group (MEPG), local authorities' own internal response teams, and often through collaboration and best practice sharing via the Heads of Instrumental Tuition Scotland (HITS) network. Examples of these policies include East Ayrshire's Digital Residency that provided resources and other opportunities to pupils, digital upskilling of IMS staff, and provision of digital devices to pupils and other IT upgrades. Additional approaches are outlined throughout this report and the Summary Tables and include delivery of online lessons, additional cleaning of practice areas, delivery of lessons in smaller groups than usual, and delivery of online IMS events such as concerts.



## Summary

The results of this year's survey show the enormous impact that Covid-19 has had for instrumental music services, in common with all other services delivered by local authorities. Lessons have moved largely online, pupil recruitment has been severely curtailed, fees have been waived or reduced in many local authorities, and most additional activities like concerts or bands have not run at all. Perhaps the clearest indication of the impact of the restrictions that have been placed on services is pupil numbers, with a 26% drop in pupils participating in instrumental music tuition. In 2020/21, and despite all of the obstacles, services still delivered lessons to 41,549 pupils. This demonstrates not only the continued popularity of these services and, perhaps particularly at a time when young people have faced unprecedented upheaval in their lives and a crisis in mental health outcomes, the invaluable role these services play for young people's personal wellbeing and development. The results also demonstrate the enormous levels of commitment, hard-work, and willingness to adapt to the new circumstances amongst IMS staff members, without whom these services could not operate at all.

Throughout the pandemic, and previously, local authorities have continued to work to ensure that services are open and accessible to as many pupils as possible. As in previous years, all pupils eligible for free school meals or whose parents claim equivalent benefits were provided tuition free of charge. Similarly, several local authorities reduced or removed their fees altogether in recognition of the impact on household budgets that Covid-19 would have. As a result, a sizeable proportion of pupils claiming FSM do participate in instrumental music tuition due to the continued effort by services to ensure low income is not a barrier to participation in IMS.

Finally, much attention in previous iterations of this survey has been paid to the levels of fees charged by each local authority. In future this will no longer be the case, as the

Scottish Government has taken the decision, and reached agreement with COSLA, for the removal of all fees in 2021/22. As demonstrated in this report and in previous years, services have been under financial pressure as local authorities have been required to find cost savings within the shrinking number of discretionary services available to them, such as instrumental music. Future funding provided by the Scottish Government will need to not only meet existing service and expenditure requirements, but meet any rising demand as a result of the removal of fees. In addition, as this decision has removed the option for local authorities to raise income to subsidise services through fees, funding will need to be such that continued financial pressures do not necessitate the achievement of equivalent savings through reduction in service levels. This is particularly the case as capacity to deliver instrumental music tuition has already been in decline for several years. Lastly, any future funding model has to take care not to simply transfer financial pressures to other service areas. The impact of these changes will be recorded in future Instrumental Music Surveys and will provide an important source of information against which to assess how these services are affected.

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November 2021

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The logo for Improvement Service, featuring the letters 'is' in a dark blue, lowercase, sans-serif font. A small red dot is positioned above the 'i', and another red dot is at the end of the 's'. Below the 'is' is the word 'improvement' in a dark blue, lowercase, sans-serif font, followed by the word 'service' in a red, lowercase, sans-serif font.  
improvement **service**