

Making MUSIC

*Teaching, learning
& playing in the UK*

A COLLABORATIVE RESEARCH PROJECT
September 2014



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Preface

Between 1993 and 1999 ABRSM carried out three substantial programmes of research into the teaching, learning and playing of musical instruments in the UK. The ABRSM reports based on that research had a significant impact on the music education environment.

With the Wider Opportunities programme established, the publication of Darren Henley's February 2011 report into music education in England, the November 2011 National Plan for Music Education and the setting up of the Music Education Hubs network in England – plus the deepest recession in the UK for many years – now seems an appropriate time to look again at what is happening to musical instrument teaching and learning.

This report, we believe, will be of huge significance in a changing music educational environment. Its significance has been enhanced by the willing cooperation of the many organisations that have helped ABRSM with this project.

I extend my thanks to them but also to those within ABRSM who have driven this project with such energy and determination, most notably our Director of Strategic Development, Lincoln Abbotts; our Business Development Director, Ben Selby; our Research Manager, Claire Milner and our communications team of Tony Pinkham and Triona Doherty.

Leslie East

Leslie East
Chief Executive, ABRSM

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A word from Lincoln Abbotts, Director of Strategic Development, ABRSM

INTRODUCTION

Music is a fantastic thing. It has spirit, energy and discipline. Music is fun and engaging. It brings people together. Music is why we at ABRSM, and everybody who has contributed to this report, do what we do: we're passionate about music and about inspiring musical learning, participation and progression.

Making Music has brought together many of the leading people and organisations in UK music education. We are particularly pleased that the two leading music exam boards – ourselves and Trinity College London – have worked together on the project. All of the partners you see named in this report want to make a difference by collaborating, to build on the strong foundations that are in place and to secure the future of music education in the UK.

This report – the largest cross-sector venture of its kind – offers fascinating insights into the teaching, learning and playing of instruments in the UK today. It shows us that there is plenty to celebrate when it comes to music education: an increasing number of people are making music; more people are learning an instrument; new technologies are encouraging greater engagement; and government interventions (designed to encourage more children to engage in musical activity) have had a positive effect. But while there's plenty to celebrate, this report also shows that there is still much that can be improved upon if the music education sector and policy makers work together.

It's amazing to think that ABRSM published the first of its *Making Music* surveys almost 20 years ago and the last one 14 years ago. What excites us is that we have been able to build on that body of work this year, reflecting the many changes in the sector, both the successes and the challenges.

Making Music is then a research project looking at music education in 2014 and a celebration of the work of music teachers – colleagues who truly care about teaching, and who are dedicated to imparting their knowledge, insight and love of music to others.

Whether you're reading this report as a teacher or as a learner, parent, policy maker or anyone else, I hope it offers a useful context and that the Next Steps section (page 50) at its conclusion provokes debate, decisions and action towards even more opportunities for people of all ages to learn, participate and make progress in and through music.

Lincoln Abbotts



2 ABOUT THIS REPORT

An overview of the project, its methodology and those who contributed to it

Making Music is the most comprehensive collaborative survey of its kind yet undertaken. ABRSM had previously identified a knowledge gap in the learning and teaching of instruments and singing and in 1993 conducted *Making Music*, a large-scale learner and teacher survey repeated in 1996 and 1999. Its key finding – that music learning was on the decline – contributed to securing wider provision and funding for music education at state level.

This 2014 report represents a major collaboration with partners from across the music education sector. Its recommendations have been informed not only by the survey's statistical data but also by a roundtable discussion and a series of one-to-one interviews with many organisations and individuals. ABRSM would particularly like to thank the following for their commitment, advice and input:

Deborah Annetts (Incorporated Society of Musicians); **Nick Beach** (Trinity College London); **Matthew Chinn** (Royal Conservatoire of Scotland); **Dónal Doherty** (Heads of Music Services Northern Ireland); **Hannah Fouracre** (Arts Council England); **Miranda Francis** (Royal College of Music); **Matt Griffiths** (Youth Music); **Richard Hallam MBE** (Music Education Council); **Professor Susan Hallam** (Institute of Education); **Robin Hammerton HMI** (Ofsted); **Fran Hanley** (Musician's Union); **Darren Henley OBE** (Managing Director, Classic FM); **Karen Humphreys** (Royal Northern College of Music); **Howard Ionascu** (Royal Academy of Music); **Rachel Kilby** (CAGAC, Wales); **Douglas Lonie** (Youth Music); **Graeme Smith** and **Nigel M Taylor** (Music Mark); **Diane Widdison** (Musicians' Union); **Crispin Woodhead** (musicteachers.co.uk) and **Paul Wood** (Heads of Instrumental Teaching Scotland).

Research objectives and methodology

London-based research agency, Critical Research, worked with ABRSM to find out more about attitudes and behaviour towards learning and teaching in the UK.

The research was conducted in two stages:

Adults (aged 18+) and children (aged 5–17) were interviewed via an online panel partner. The final data was re-weighted back to a nationally representative profile on age and gender, in line with statistics obtained from the Office of National Statistics¹. In total 1,726 children and 1,255 adults were interviewed.

In order to obtain views from teachers throughout the UK, a number of partner organisations that represent the diversity of music education were also invited to participate in the research. Critical Research designed an online survey that was emailed to the full databases of ABRSM and Trinity College London teachers. The following partners also distributed the survey link to their teacher networks:

CAGAC; Heads of Instrumental Teaching Scotland; Heads of Music Services Northern Ireland; Incorporated Society of Musicians; Music Education Council; Music Mark; musicteachers.co.uk; Musicians' Union; National Foundation for Youth Music.

In total 4,491 teachers were interviewed.

Where possible, results have been tracked back to data available from child learners from research conducted in 1993, 1996 and 1999 for previous ABRSM *Making Music* reports.

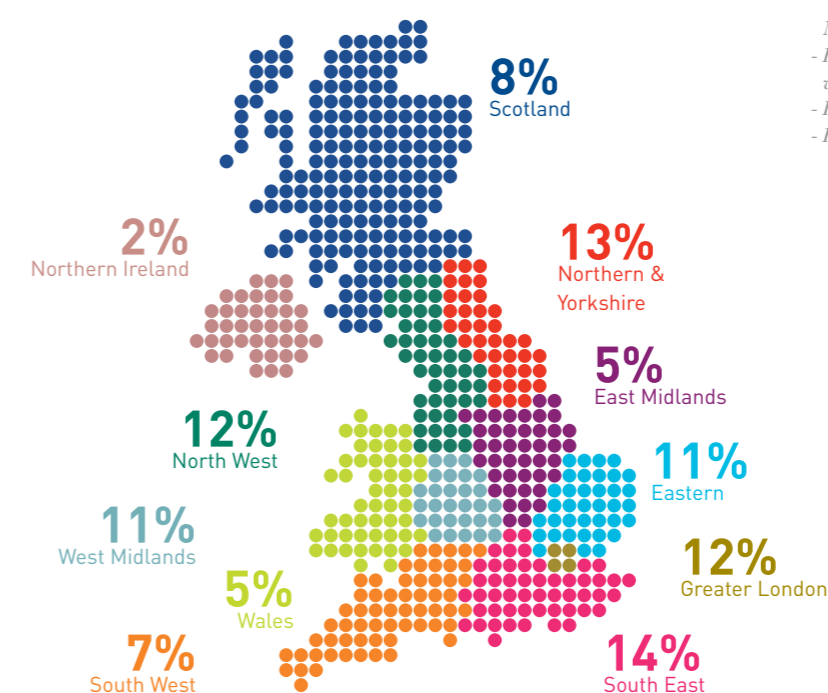
The previous data for adult and child learners was collected via a nationwide omnibus survey. In 2014, an online methodology was used to enable more in-depth questioning, a more robust sample frame and greater control over data quality. Data from 1999 and before was not re-weighted to a nationally representative sample and details of the exact sampling are no longer available. Therefore we are unable to apply statistical significance testing to tracking data and whilst the original question wording and bases have remained consistent, any tracking comparisons can only be seen as indicative as opposed to conclusive.

Number of interviews (5-14 year olds)

1993: 861 1996: 784 1999: 927 2014: 1,487

It should be noted that the 1993-1999 data segmented children as aged 5 to 14 and adults as 15 years or older. In 2014, children were reclassified as 5 to 17 and adults as 18 years or older, as this was deemed more appropriate. However, any data used for tracking purposes was re-weighted to reflect the previous age profiles.

Fig 1. Respondent profile: where do you live? *Child and adult learners*



Notes Fig 1

- Figures taken from data which was not weighted.
- Fig 1 data based on question: Q1.
- Fig 1 base: 2,981.

1. 'Population pyramid for the United Kingdom, mid-2012 compared with mid-2001'. www.ons.gov.uk

Fig 2. Respondent profile: age and gender **Child and adult learners**

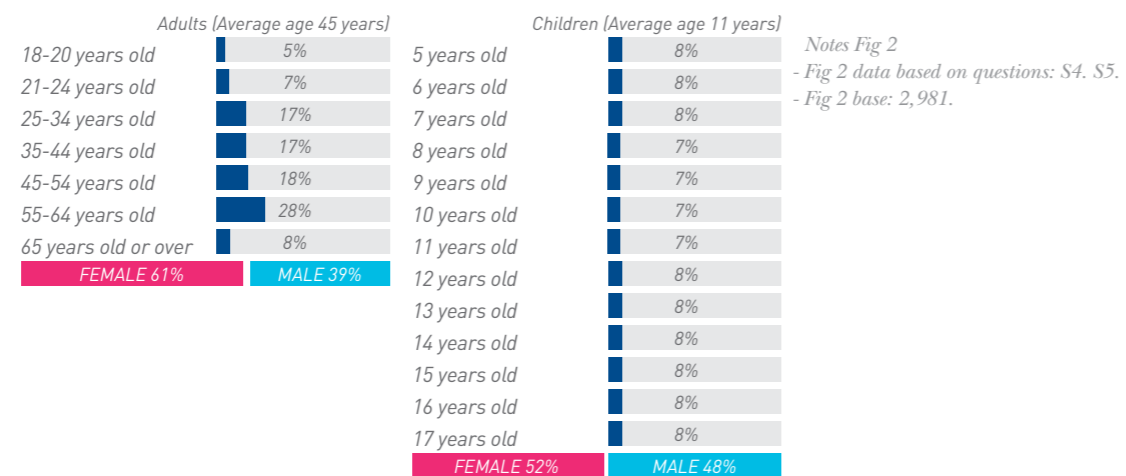


Fig 3. Respondent profile: social class **Adult learners**

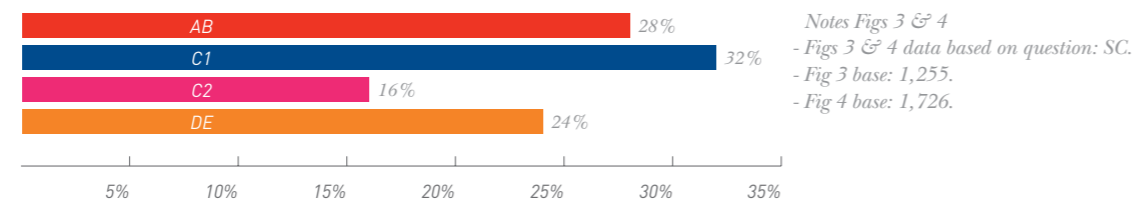


Fig 4. Respondent profile: social class **Child learners**

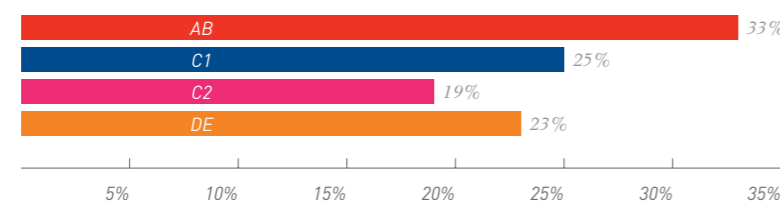


Fig 5. Respondent profile: age **Teachers**

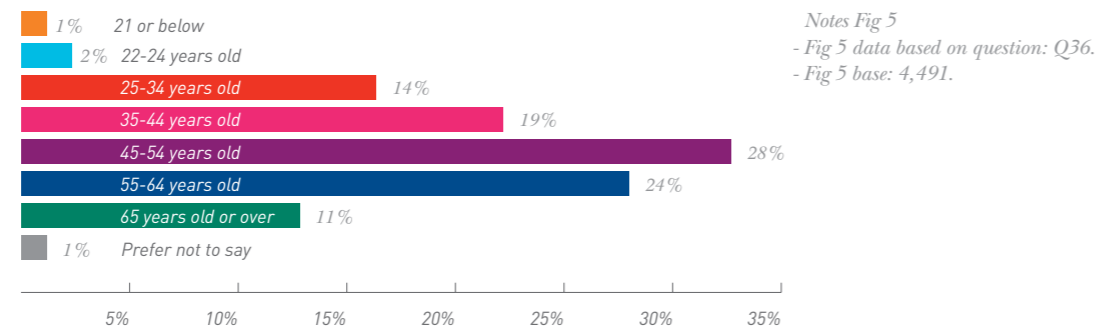


Fig 6. Respondent profile: subjects taught **Teachers**

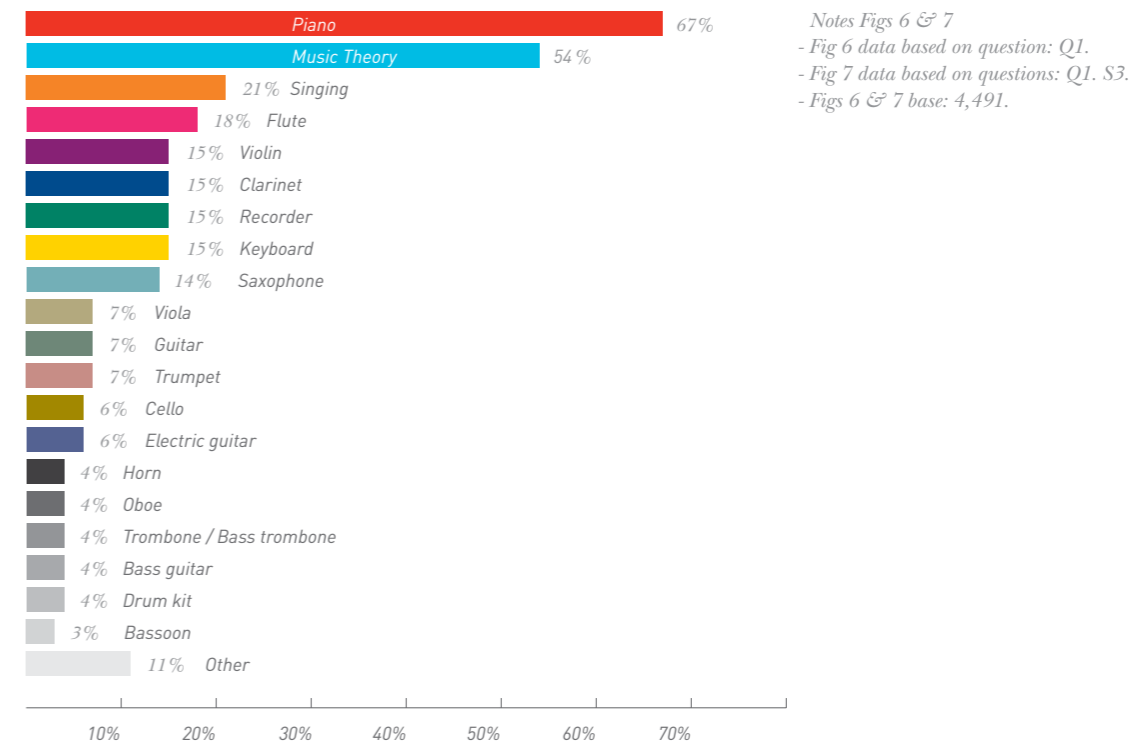


Fig 7. Respondent profile: role associated with music and teaching **Teachers**

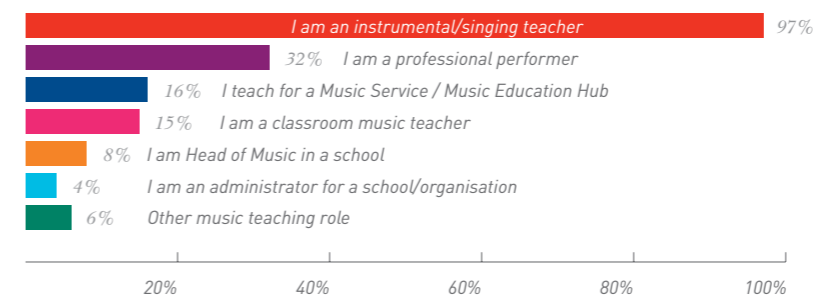
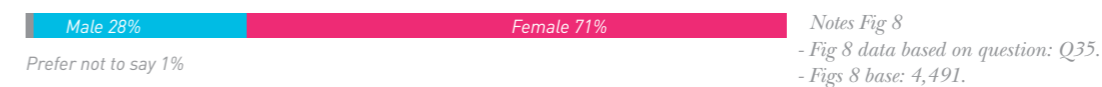


Fig 8. Respondent profile: gender **Teachers**



3

The UK's musical landscape has been transformed over the last two decades

EXECUTIVE SUMMARY

As this survey demonstrates, increasing numbers of children are playing a wider variety of instruments. As many young learners now play electric guitar as play the violin and more young people play two instruments or more. Young learners are increasingly influenced by role models when choosing an instrument to learn and, as they grow older, they make music in increasingly diverse ways. Technology, too, is providing new opportunities for anyone to engage with and create their own music.

Simultaneously, the nation's music teachers are expressing high levels of professional satisfaction. Instrumental and singing teachers are remarkably fulfilled, reflecting the rewarding nature of their work and their enjoyment of teaching.

All this has happened in the context of changes to the education landscape, such as the increased autonomy of head teachers, a revised national curriculum and the introduction of the academy and free school programmes. There has also been a plethora of positive political and sector-led initiatives and research activity – from Musical Futures and Wider Opportunities to the Henley review of music education, the first National Plan for Music Education, the creation of Music Education Hubs and the recent Paul Hamlyn Foundation review of music in schools². Successive governments' policies have helped bring about real improvement. There is, then, much to celebrate.

Although the trajectory over the last 15 years is generally positive, there are areas of concern: many children and young people have not had access to instrumental lessons, while others have no engagement with formal music tuition after primary school.

Children from lower socio-economic groups continue to be significantly disadvantaged compared with their peers from more affluent backgrounds. Sustained, progressive music education tends to be the preserve of children born to wealthier parents. This report shows that adults who had private lessons as children and sat a music exam were much more likely to still play an instrument – and the higher the grade achieved, the more likely they were to continue learning.

The cost of learning to play and of taking lessons is a major barrier and children without access to tuition are significantly less likely to carry on playing. Regional provision is variable and the diverse ways in which learners progress are not necessarily well supported by the sector.

Teachers' experiences also vary widely depending on whether they work in the private or public sector. In the latter particularly, there are examples where pay rates have dropped and job security is low. The music teaching community is increasingly diverse but, outside of the classroom, largely unregulated. Almost 50% of teachers cite a lack of support from schools and parents, plus poor motivation from students as among the most common negative aspects of their work.

There are, of course, complex factors at play. Funding realities, geographical inequities, unclear and sometimes poorly supported progression routes, the perception of music education's value in a culture that promotes academic achievement, the role of school leaders, the lack of exposure to a range of musical styles from a young age... all these things need attention if the positive gains of the last two decades are to be continued.

2. *Inspiring Music for All: Next Steps in Innovation, Improvement and Integration. Paul Hamlyn Foundation Review of Music in Schools. 2014.*



**'It's creative, relaxing.
I can make music with
friends and you never
stop learning'**

- A learner responding to what they enjoy most about making music.

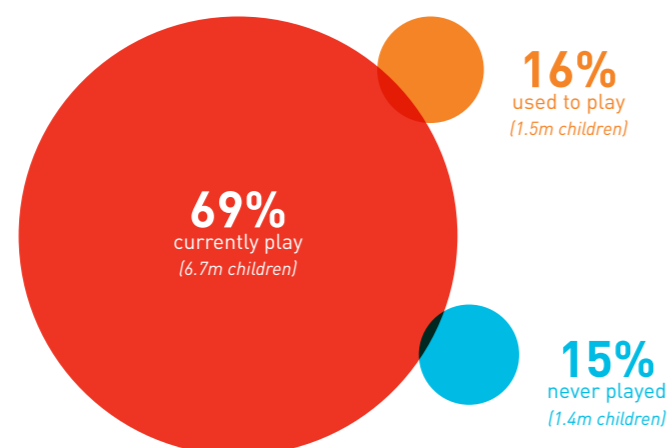
4 The statistics: part 1

OPPORTUNITY AND PROGRESSION

Seven in every 10 children (69%) in the UK say that they currently play a musical instrument – a considerable increase over time compared with previous ABRSM research (see Fig 25, page 24). Of these, just over half are currently taking instrumental lessons.

It is worth noting that the phrase ‘play a musical instrument’ will mean different things to different children. So this statistic will encompass everything from children playing simple percussion at a basic level to those learning and working towards their Grade 8 exam.

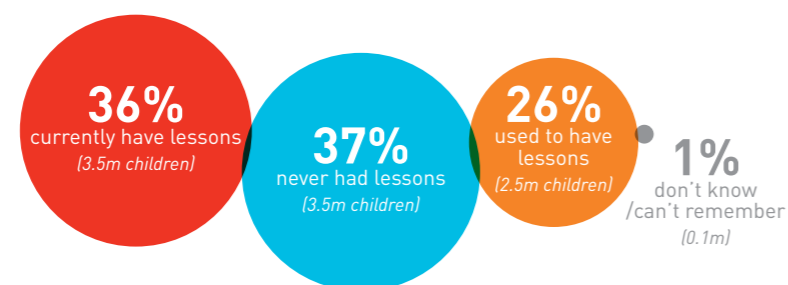
Fig 9. Instrumental playing: currently, used to and no longer play **Child learners**



Notes Figs 9 & 10

- Play an instrument = respondents who say they know how to or have learned to play an instrument.
- Taken lessons = respondents who have played an instrument and had instrumental lessons at school or privately.
- Population data based on ONS estimates.
- Fig 9 data based on questions: Q3, Q4, Q10.
- Fig 10 data based on questions: Q14, Q18.
- Figs 9 & 10 base: 1,726.

Fig 10. Instrumental lessons: lessons at school/privately **Child learners**

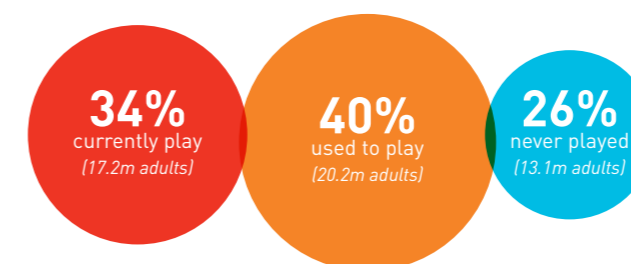


An encouraging 85% of children have played a musical instrument compared with 74% of adults. More children have had instrumental lessons too (62%) compared with fewer than half of adults. The proportion of adults who have not played an instrument steadily increases with age, rising from 8% at 18 to 20 years old to 38% at 65 years and over (see Fig 15, page 17). This suggests that much progress has been made in recent decades in giving people access to instrumental learning opportunities.

More remarkable still is the number of young people who self-identify as playing an instrument but state that they have never had lessons; some 21% of children who play are therefore learning through informal routes such as peer-to-peer networks, by accessing digital tools, or by being self-taught in other ways. There is also a possibility that these children may have played an instrument in the classroom, but did not identify this as being an instrumental lesson.

The number of child learners who say they have never played stands at 15%, with more than a third of respondents claiming never to have had an instrumental lesson.

Fig 11. Instrumental playing: currently, used to and no longer play **Adult learners**



Notes Figs 11 & 12

- See notes on Figs 9 & 10.
- Fig 11 data based on questions: Q3, Q4, Q10.
- Fig 12 data based on questions: Q14, Q18.
- Figs 11 & 12 base: 1,255.

Fig 12. Instrumental lessons: lessons at school/privately **Adult learners**



Children, on average, start playing at 7.6 years of age but of the 16% who have stopped playing, they have done so by the age of 11.1 years. By the age of 16 to 17, almost a quarter of young people have never had an instrumental lesson but 97% have played an instrument. Music has increasing significance as young people develop but non-formal routes appear to be as important to them as formal ones.

Fig 13. Instrumental playing: playing by age **Child learners**

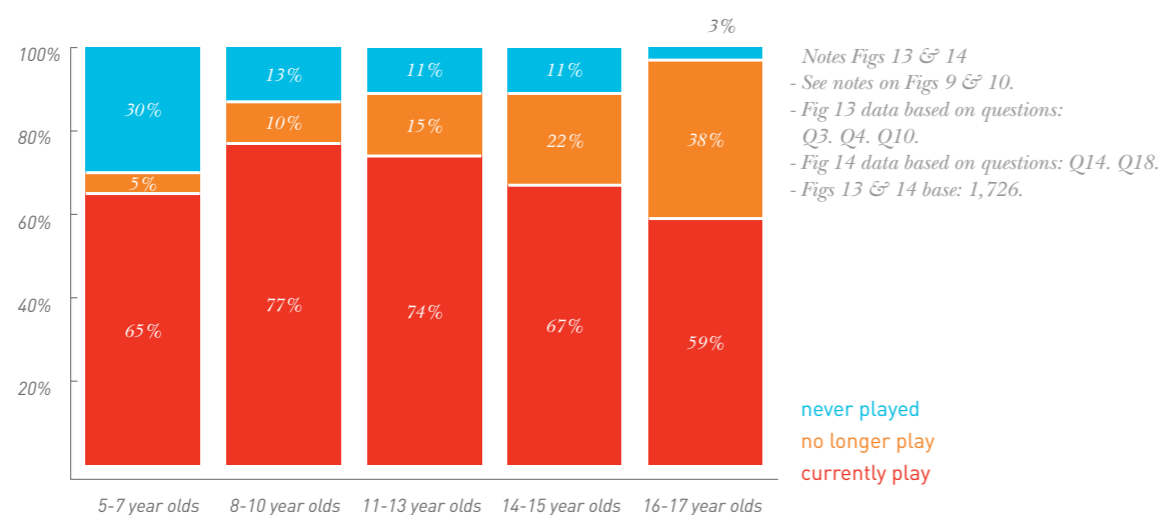
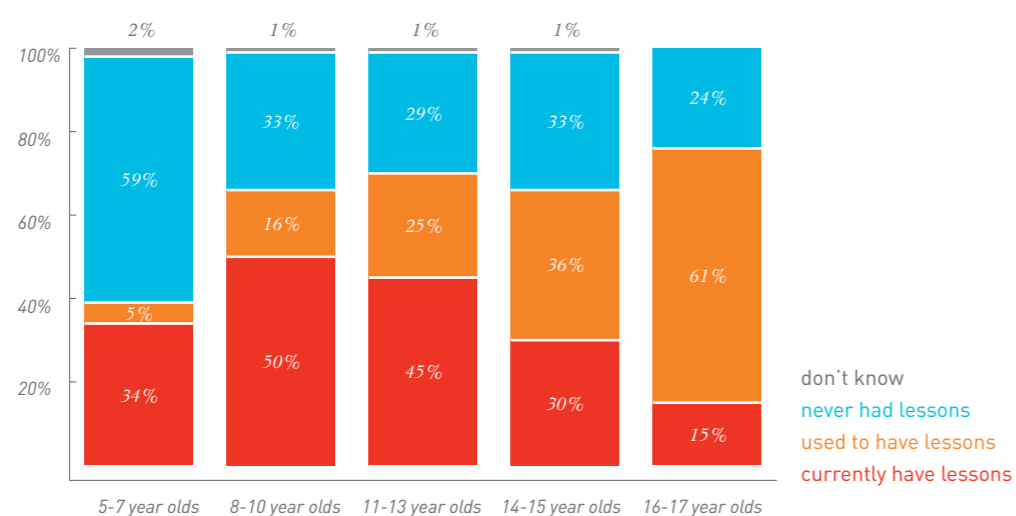


Fig 14. Instrumental lessons: lessons by age **Child learners**



Whilst the regional response base is low, the data points to significant geographical variations, with almost half of children in Wales who responded (47%) stating they had never had instrumental lessons (see Figs 21 and 22, page 20). Less than a third of child learners in Northern Ireland currently have lessons compared with more than half of respondents there who stated they used to but no longer have lessons.

Fig 15. Instrumental playing: playing by age **Adult learners**

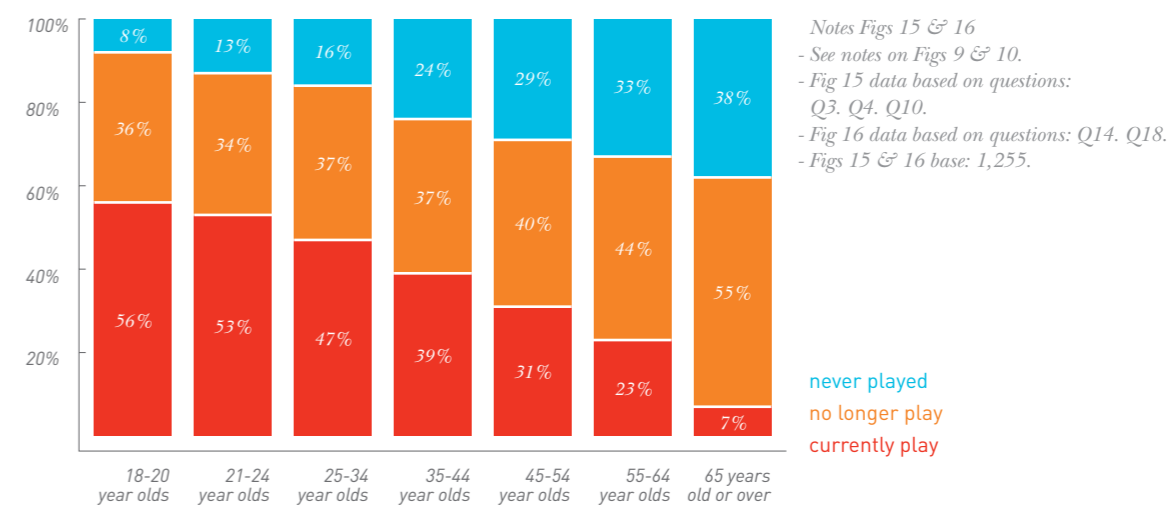
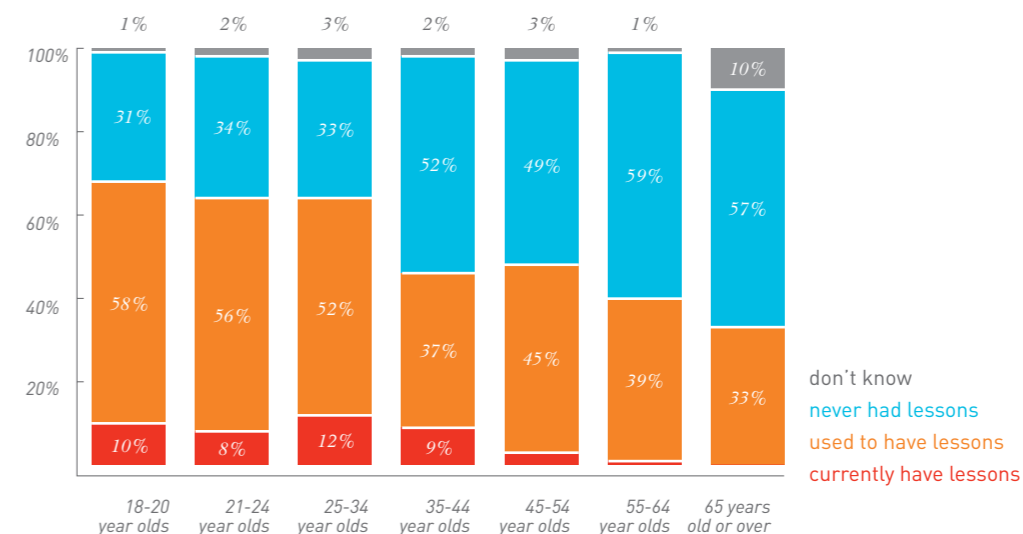


Fig 16. Instrumental lessons: lessons by age **Adult learners**



The significant disparity between children from AB social backgrounds and those from social grades C1, D and E is worrying. 90% of children from AB backgrounds will have played an instrument, compared with 80% of children from other social grades. In addition, 74% of children from AB backgrounds have had instrumental lessons compared with only 55% of children from social grades C1 and DE.

While broader social, economic and geographical factors play a role here, we need to identify ways of improving the musical engagement and learning opportunities of young people from more deprived backgrounds³. The majority of children are taught in school in a group (58%) but almost half of children having private or individual lessons (at school or elsewhere) are from AB backgrounds.

Fig 17. Instrumental playing and lessons: by social grade **Child learners**

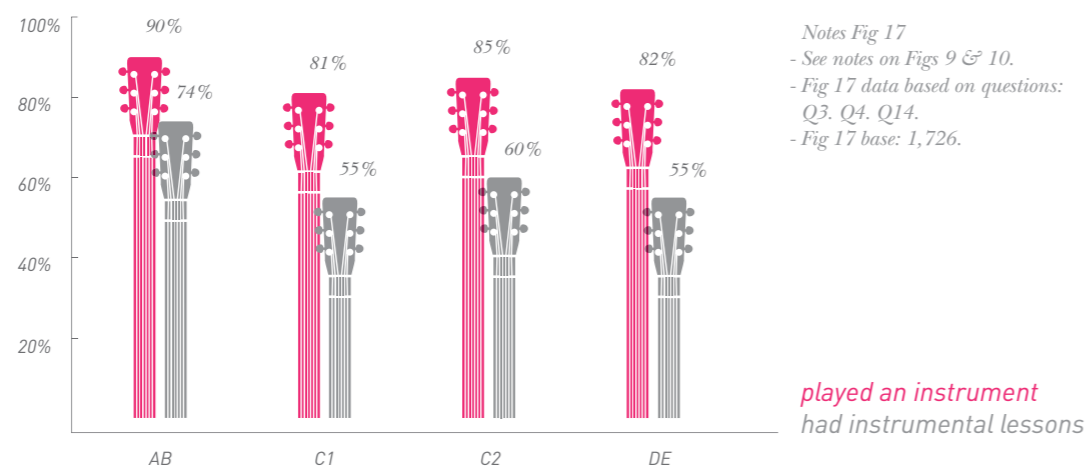
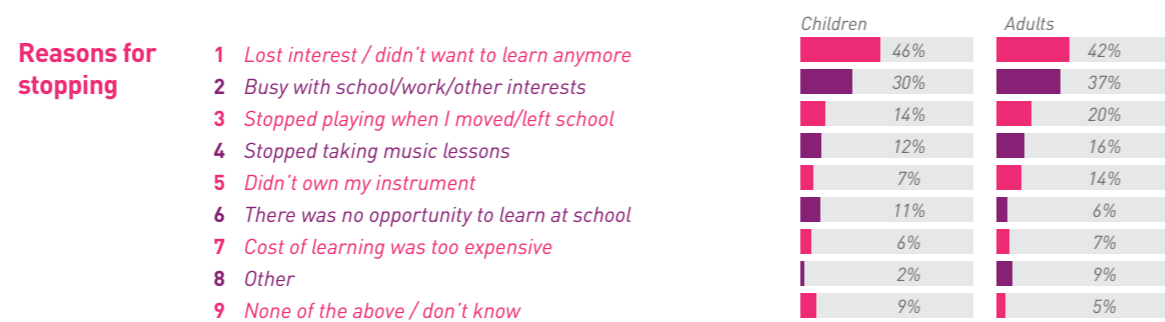


Fig 18. Instrumental playing: stopped playing a musical instrument **Child and adult learners**



3. This may relate to a school's emphasis on music or to opportunity if parents are required to contribute financially.

Almost 30% of children (and a quarter of adults) who have never played an instrument, identified the financial expense of learning as a barrier (see Fig 19). Furthermore, 40% of children from DE social grades said they had no opportunity to learn at school. Cost (a factor also identified by teachers as a barrier) is clearly a disincentive to instrumental learning (see Fig 45, page 36 and Fig 56, page 45).

The primary reason children and adults stop learning is lack of interest in playing as well as competing pressures from school, work and other activities (see Fig 18). This also correlates directly with the main reasons teachers cite as barriers to musical progression and continuation (see Fig 54, page 43).

Fig 19. Instrumental playing: never played an instrument **Child and adult learners**

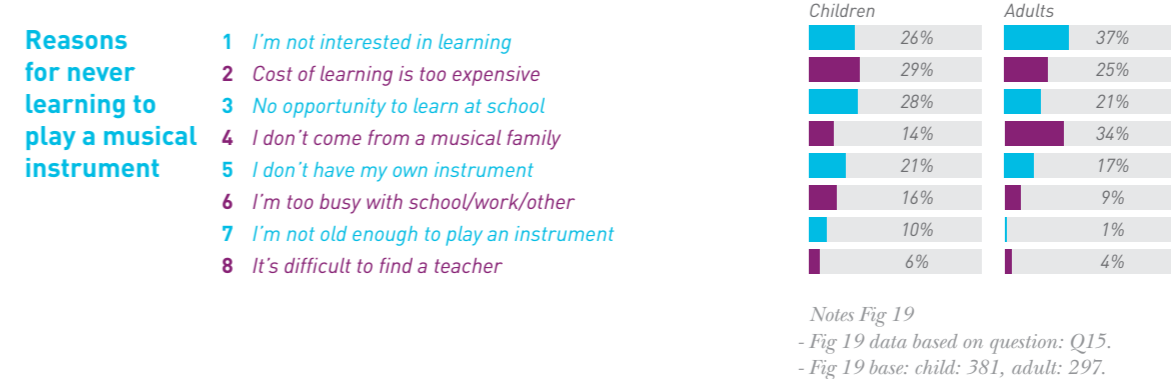
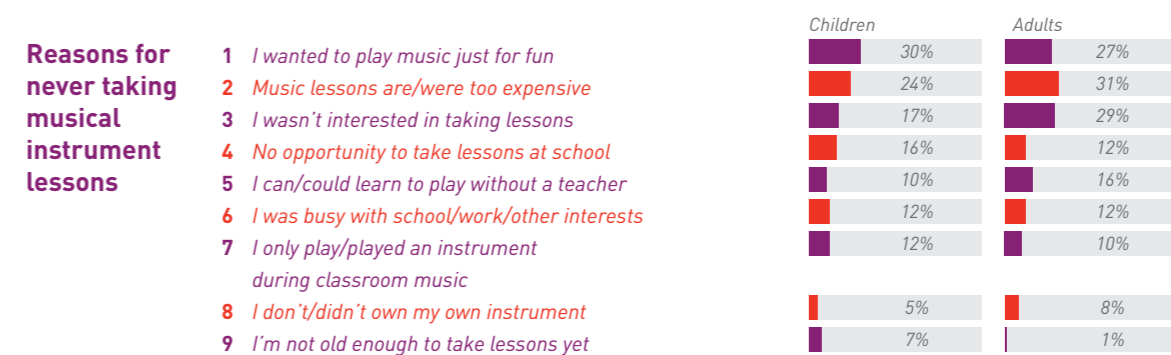


Fig 20. Instrumental lessons: have played but never had lessons **Child and adult learners**



In terms of structured progression routes, just over a fifth of children have taken a music exam of any type, with children from the highest social grades twice as likely to have taken such an assessment. More than half of those who have private instrumental lessons have taken an exam compared with less than a third of those who have instrumental lessons at school (see Fig 23).

The survey clearly shows that adults who have had private lessons or taken a music exam are much more likely to continue playing an instrument – and that the higher the grade achieved the more likely they are to continue (see Fig 24). This implies that music exams offer a positive route to progression and continuation.

Fig 21. Instrumental playing: playing by country **Child learners**

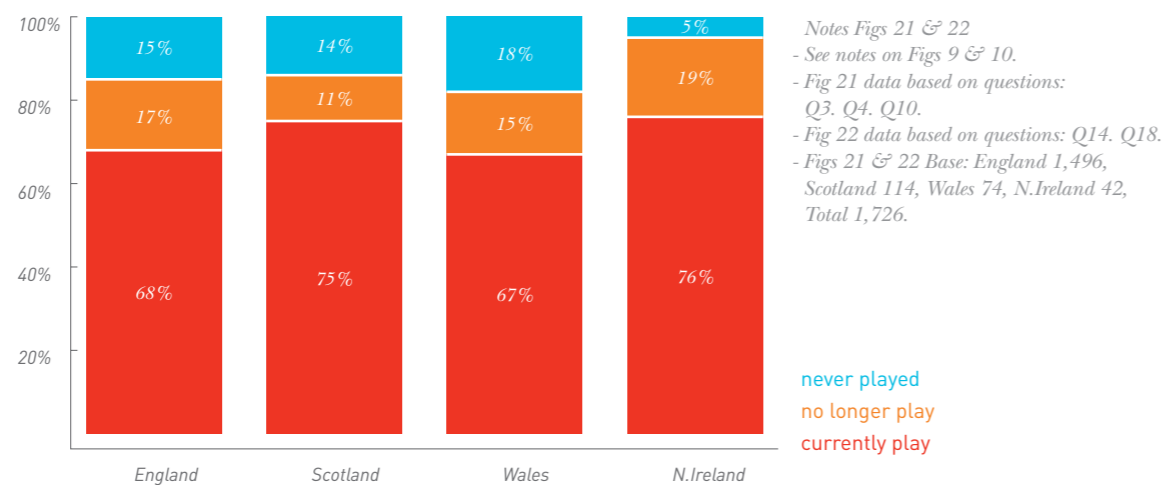


Fig 22. Instrumental lessons: lessons by country **Child learners**

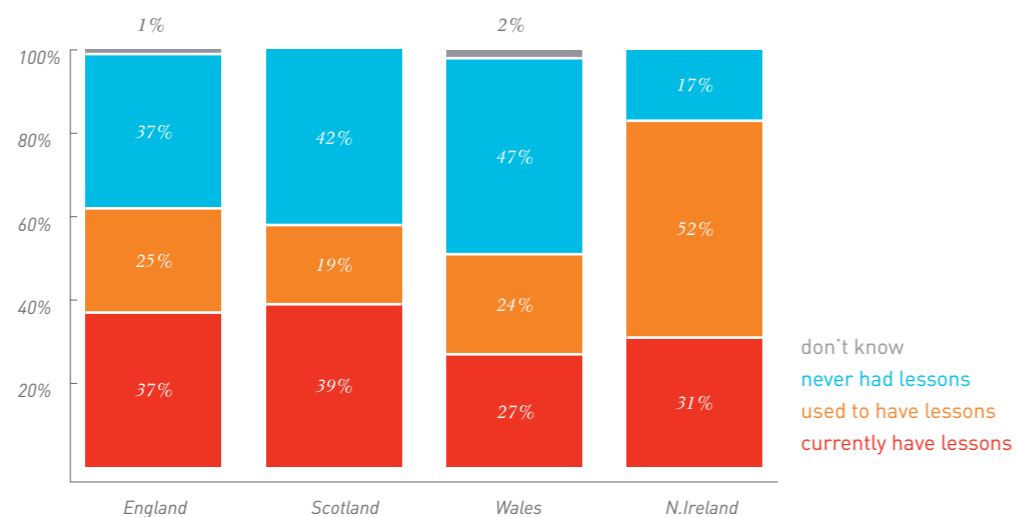


Fig 23. Exam taking: have taken a music exam **Child learners**

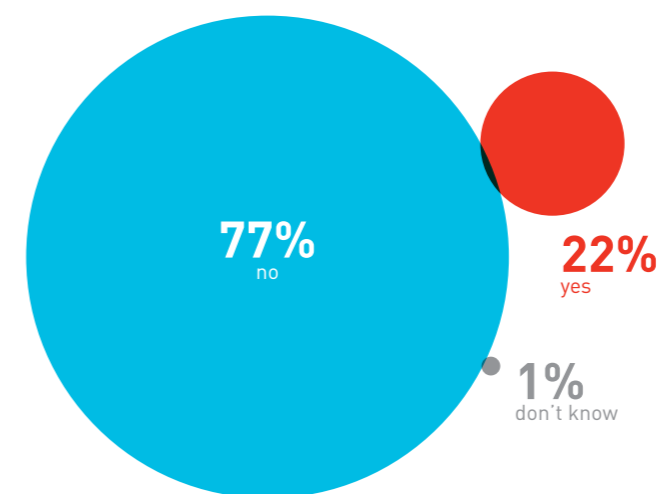


Fig 24. Instrumental playing: currently play/no longer play **Adult learners**



SUMMARY

There has been a significant increase in the proportion of children playing an instrument over the last 20 years through a mixture of formal and non-formal learning routes. However, loss of interest and competing pressures from school and other activities are the primary reasons they stop playing. Cost is a major barrier to learning and those without access to tuition – disproportionately from social grades C1-DE – are significantly less likely to carry on playing. There is also a correlation between the structured progression route offered by music exams and ongoing learning.



**'Every aspect of
making music
makes me happy'**

*- A learner responding to what they
enjoy most about making music.*

4 SHIFTS IN INSTRUMENTAL TRENDS⁴

The statistics: part 2

Fig 25. Instrumental playing (tracking): know how to play **Population estimate based on child learners (5-14 years)**

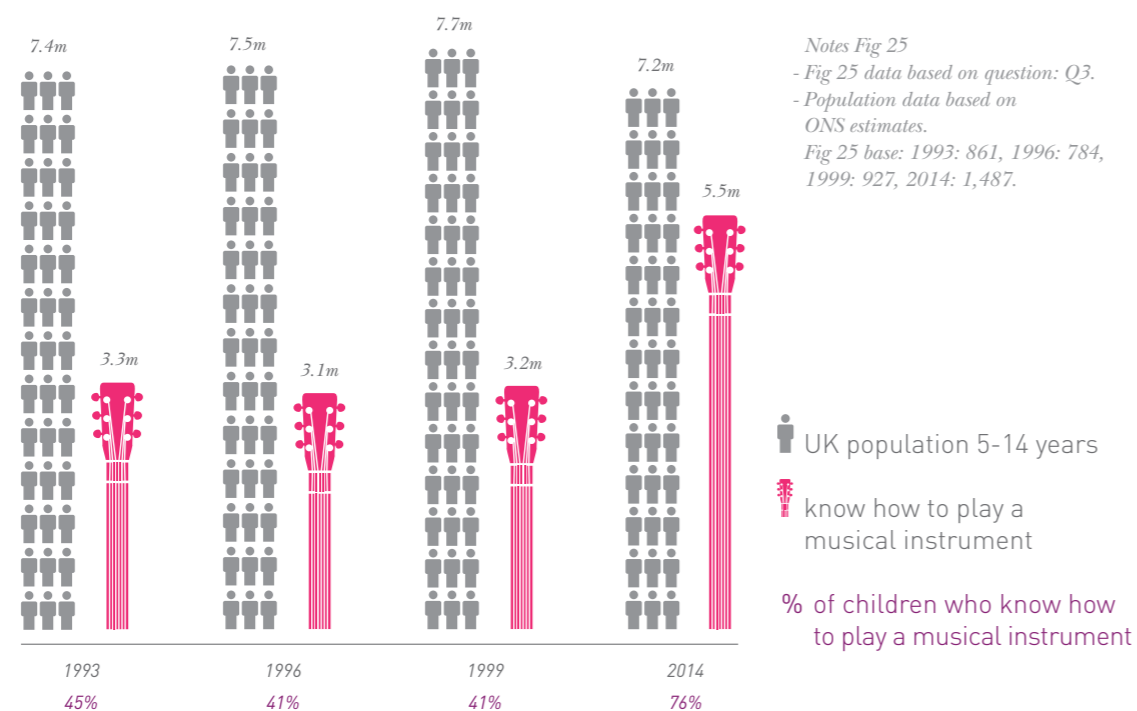
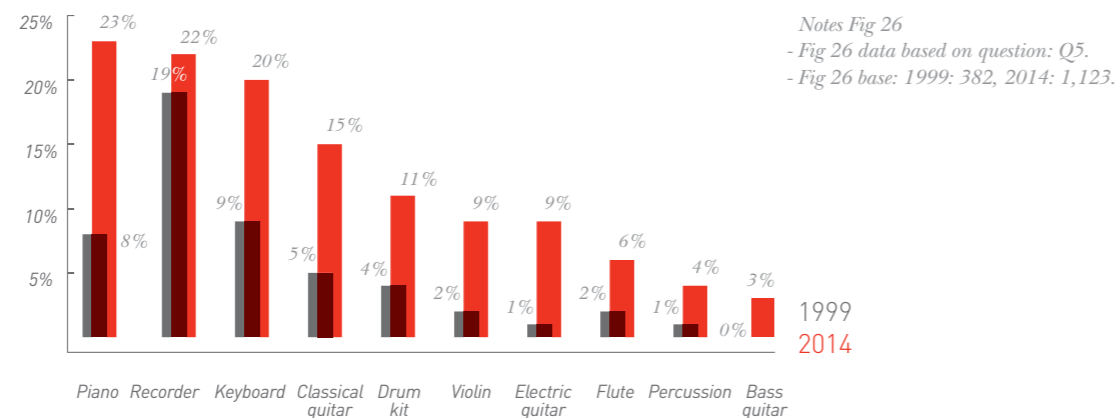


Fig 26. Instrumental playing (tracking): instrument played **Child learners (5-14 years)**



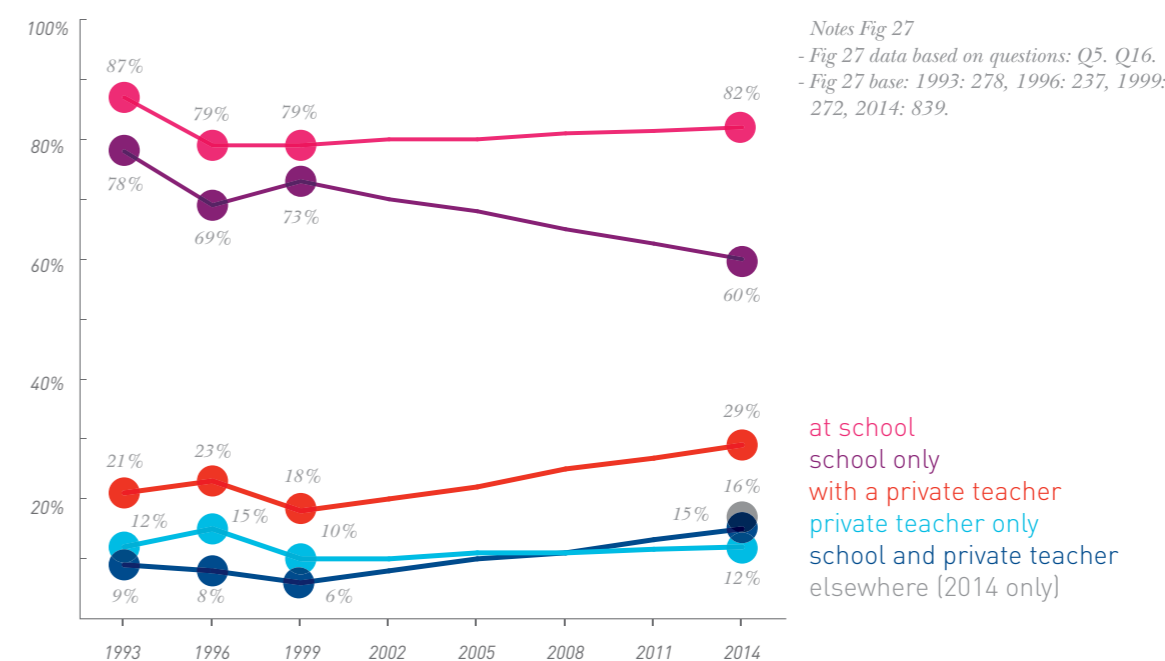
Since ABRSM undertook its previous survey, the percentage of children claiming to know how to play an instrument has increased significantly, climbing from 41% in 1999 to 76% today. This is a cause for celebration, particularly in England where successive government initiatives such as Wider Opportunities and the National Plan for Music Education have clearly had a positive impact. 1999 also saw the formation of Youth Music, through which significant funding was directed to out-of-school music projects and the non-formal sector.

The dominance and visibility of popular music styles also appears to be having an impact on music learning. There has been a measurable increase in the popularity of instruments such as the electric guitar, keyboard and bass guitar. All now appear in the top ten instruments played.

The piano has seen a 15% growth in interest (see Fig 26) but it is much more accessible to learners from AB social backgrounds, where 44% of children have played the piano compared with only 17% of DEs (see Fig 31, page 27). Despite its abundant use by classroom music teachers, the number of children playing the recorder has not increased to the same extent as other instruments (see Fig 44, page 36).

Since 1999, there has been a 9% increase in the proportion of children taking instrumental lessons both at school and privately, with an increase of 11% in private tuition overall (see Fig 27). As a consequence of this, the proportion of children who only have lessons at school has declined by 13%.

Fig 27. Instrumental lessons (tracking): lesson taking at school/privately **Child learners (5-14 years)**



4. In previous Making Music reports, child learners were classified as aged 5-14, with adults being classified as aged 15+. In order to make comparisons with previous reports, the 2014 data for the following tracking questions has been re-filtered and re-weighted on children aged 5-14, with those aged 15+ being classified as adults. This ensures that the age profile we are comparing is consistent, allowing for us to identify changes and trends. Please refer to page 6 (About this Report) for more detail about the data in this section.

This year's survey shows there are identifiable gender divisions, with significantly more boys playing drum kit and twice as many of them playing percussion compared with girls. Simultaneously, many more girls than boys are playing the recorder, violin and flute.

There are also significant differences in the playing of instruments and lesson taking amongst social grades. Figs 30 and 31 illustrate that those playing strings, brass, piano and woodwind instruments are more likely to be from social grades AB and therefore more likely to be taking lessons.

Fig 28. Instrumental playing: top ten instruments played Child learners (5-17 years)

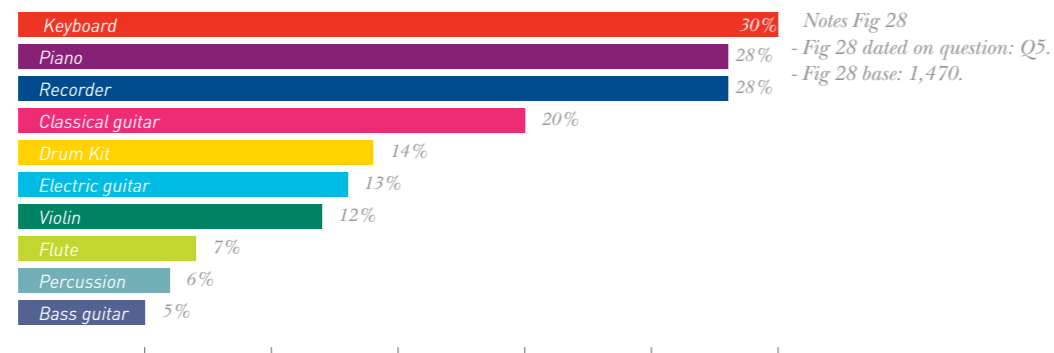


Fig 29. Instrumental playing: instrument by gender Child learners (5-17 years)

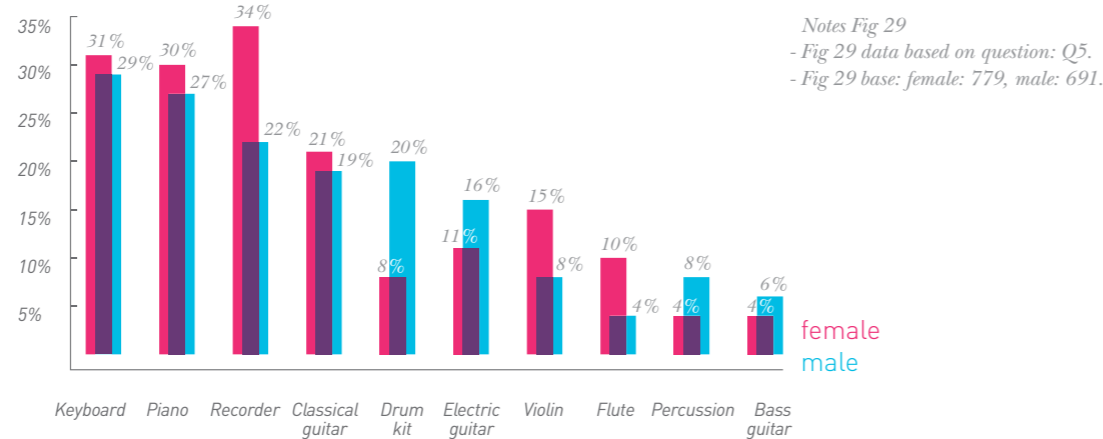


Fig 30. Instrumental lessons: lesson taking by instrument Child learners (5-17 years)

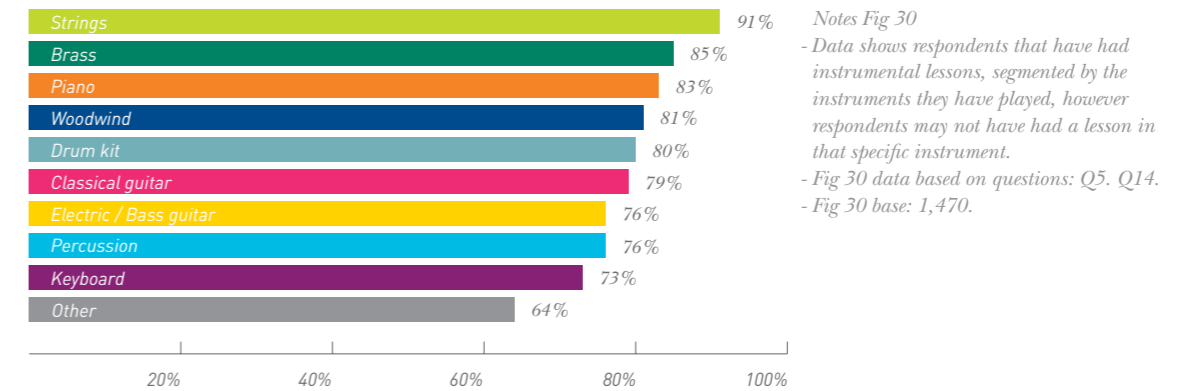
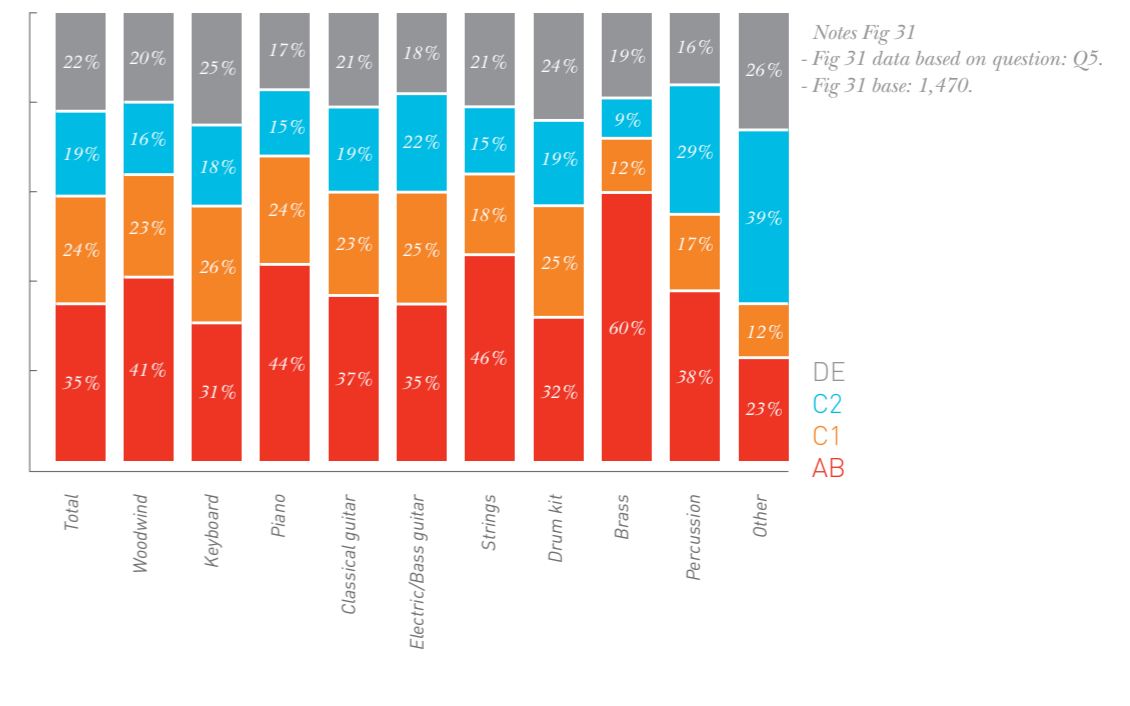


Fig 31. Instrumental playing: instrument by social grade Child learners (5-17 years)



SUMMARY

The number of UK children who know how to play an instrument has increased measurably by 35% since 1999, particularly with a growing interest in pop music instruments. Instrument take-up is also differentiated on gender lines, with more boys tending to learn pop music instruments than girls. Whilst there has been a rise in the number of children taking private lessons, there appears to be a social grade divide in certain instrumental families, where most notably string, brass, piano and woodwind players are disproportionately from AB households.



'I like playing in the orchestra and hearing how my part fits into a piece of music'

- A learner responding to what they enjoy most about making music.

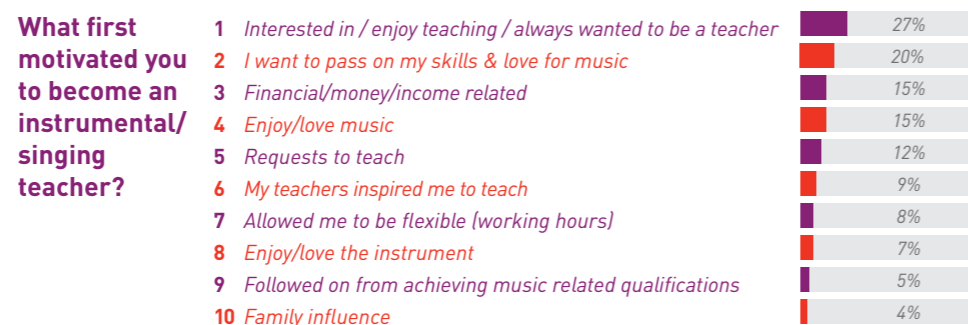
4 THE TEACHING COMMUNITY

The statistics: part 3

Despite some of the challenges they face, music teachers express great satisfaction with, enthusiasm for and commitment to their work. They are also highly qualified: almost 40% have an equivalent qualification at Masters or PGCE level, with a further third qualified up to Bachelor degree with honours.

A love of teaching, closely followed by a desire to pass on their skills and love of music itself, are the dominant factors that motivate members of the profession. On average, teachers rated their professional fulfillment level as 8 out of 10, with one in five scoring 10 out of 10. In addition, music teachers are more fulfilled the longer they remain in the profession (see Fig 34, page 32).

Fig 32. Reasons for teaching: motivations **Teachers**



'After teaching a few private pupils while I was studying, I found the experience very rewarding and fulfilling. I enjoyed the interaction with the pupils and seeing them grow in confidence, ability and musicality. I found in myself a natural ability to find creative ways of teaching different aspects of music and instrumental learning.'

'I felt strongly that everyone should have the opportunity to learn a musical instrument. It was a job that would give me flexibility and variety.'

'I was asked to teach the child of a close friend. I soon realised that I found teaching stimulating and rewarding as I was able to engage children readily and they enjoyed my lessons.'

Notes Fig 32
- Fig 32 data based on question: Q12.
- Fig 32 base: 4,491.

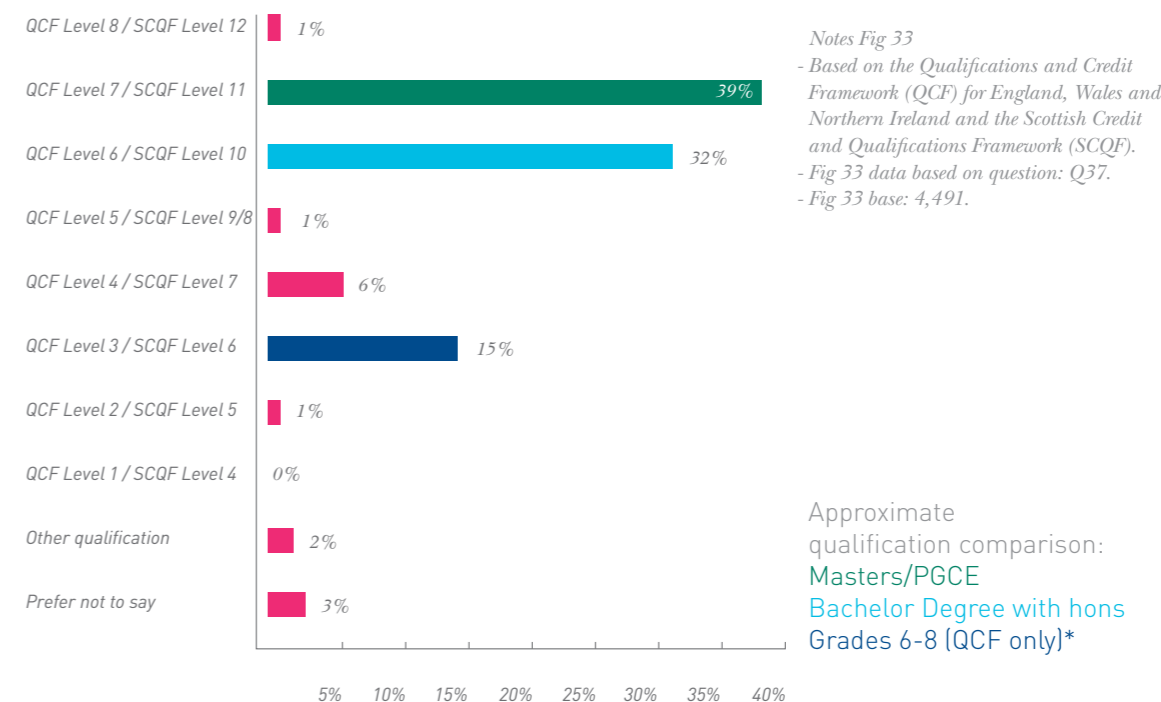
'I thoroughly enjoy teaching. It is a varied and rewarding job. I enjoy nurturing all my pupils – with their different abilities and interests,' said one teacher respondent (who rated professional fulfillment as 10).

However half of all teachers surveyed cited negative aspects to their work – from a lack of support from school management to a lack of student motivation.

Teachers' experiences also vary depending on whether they work in the public or private sector. Teachers for Music Services and at music centres express slightly lower levels of professional satisfaction. Arguably the high political profile of (and expectation placed upon) Music Education Hubs, coupled with the downward pressure on local authority budgets and reduced central government funding (see footnote, page 48), is having a more negative impact on colleagues operating in these contexts than others.

'... I am only paid for the hours I work and holidays become difficult times. I am only on a temporary cover/supply contract with the Music Service that I am with and there is no hope of being made permanent with them. Effectively it is a zero hours contract – my hours could be taken away at any time in order to keep a permanent member of staff employed. [A ranking of] 8 is quite high though as I love doing what I do now: a mixture of private students at home; some peripatetic and some classroom teaching in primary schools...' said one teacher respondent (who rated professional fulfillment at 8).

Fig 33. Qualifications: highest musical qualification achieved (in or related to music) **Teachers**



Those working in Music Education Hubs, together with classroom teachers and Music Service staff, teach the most hours at 23 per week, compared with an average of 16 for private teachers. Comments from private teachers indicate that they value the ability to choose their working hours as this allows them to fit their teaching around family life and other commitments. One teacher respondent said: 'Teaching music on a peripatetic basis offers a flexible working life and the opportunity to work in many different places with a wide age range.'

Fig 34. Professional fulfillment: score from 0-10 Teachers



Fig 35. Weekly teaching hours: average hours taught (instrumental/singing) Teachers

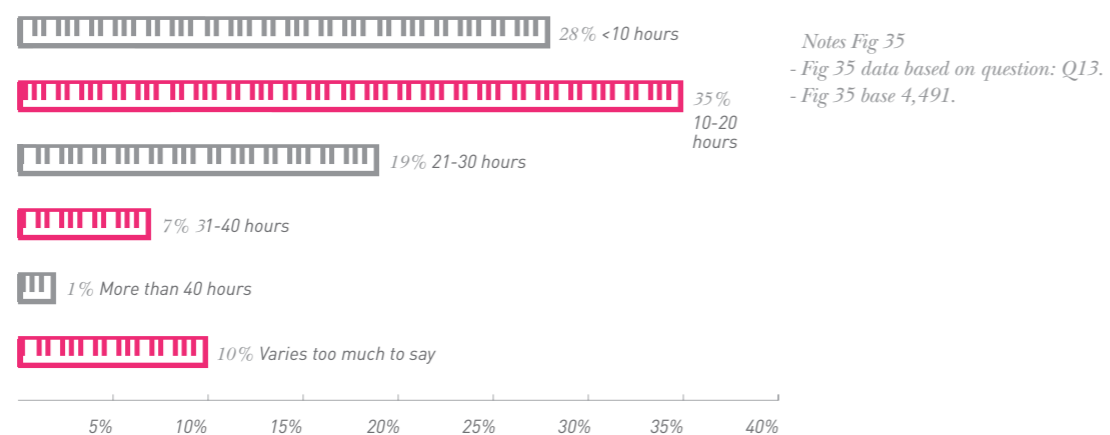
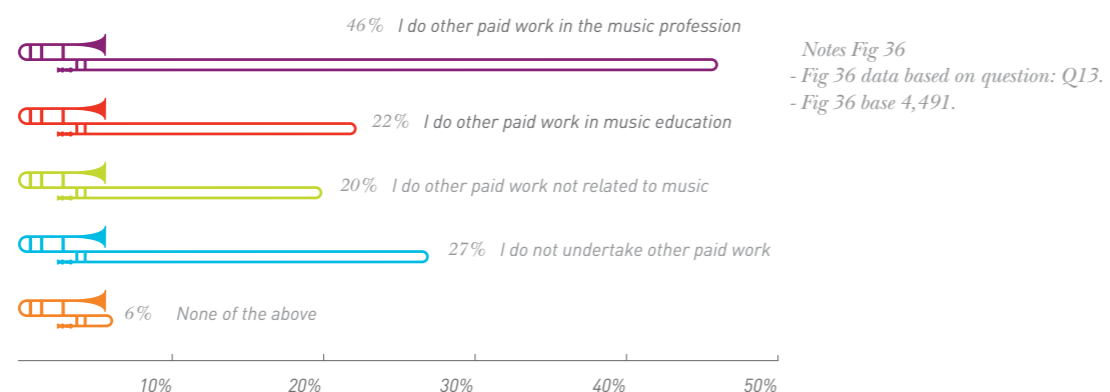


Fig 36. Other paid work: in addition to instrumental/singing teaching Teachers



Almost half of the teachers surveyed (46%) undertake other paid work in the music profession, while one in five does other work unrelated to music. This reflects the portfolio nature of musicians' and educators' careers (see Fig 36). Less than a third (27%) undertake no other paid work than teaching, while over half of teachers working for Music Services and Music Education Hubs (56%) do other paid work in music.

37% of respondents are private teachers only, with another 10% exclusively teaching in schools. However, more than half are teaching in multiple environments, mainly privately and in school (43%).

Fig 37. Teaching environment: type of teaching Teachers

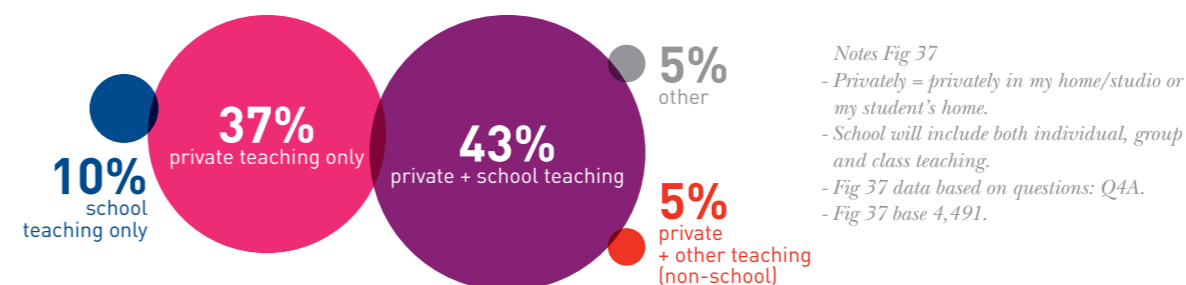


Fig 38. Teaching environment: locations taught in Teachers

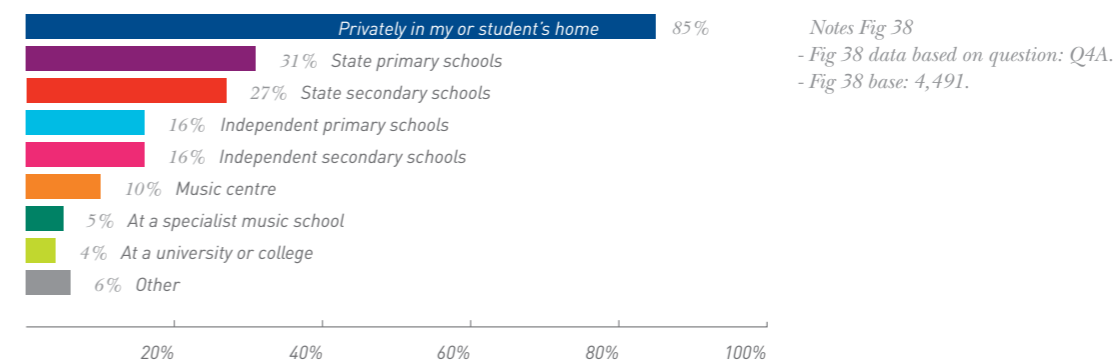
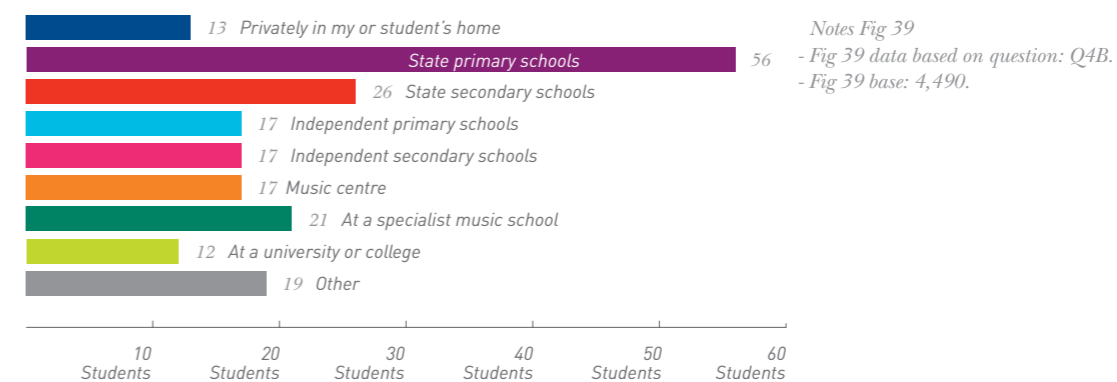


Fig 39. Teaching environment: average number of students taught by location Teachers



With 85% doing some private teaching, this represents a significant way of working for many instrumental teachers. Those working in state primary schools (31%) teach the largest number of students on average (see Figs 38 and 39, page 33).

When we look at the total number of students, we find that 56% are taught in state schools, compared with 25% privately and 12% in independent schools.

Fig 40. Teaching environment: where students are taught Teachers

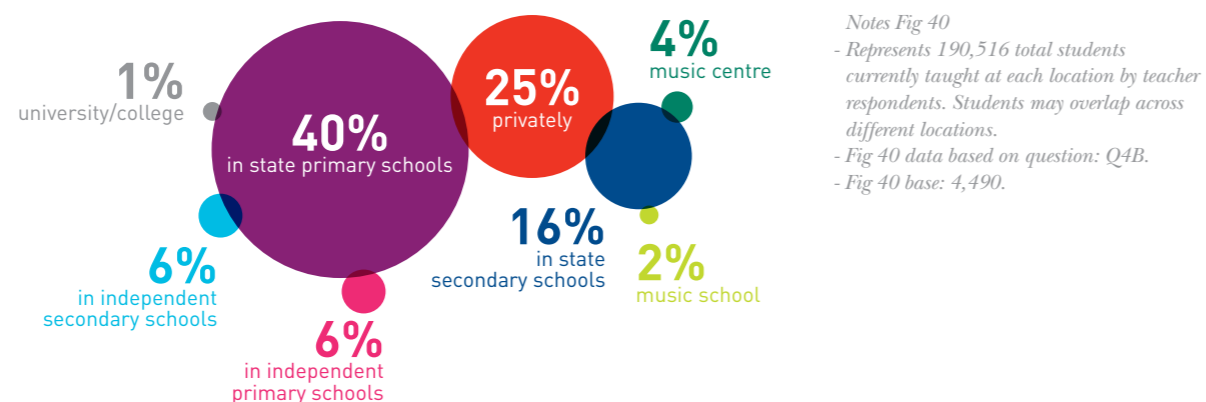
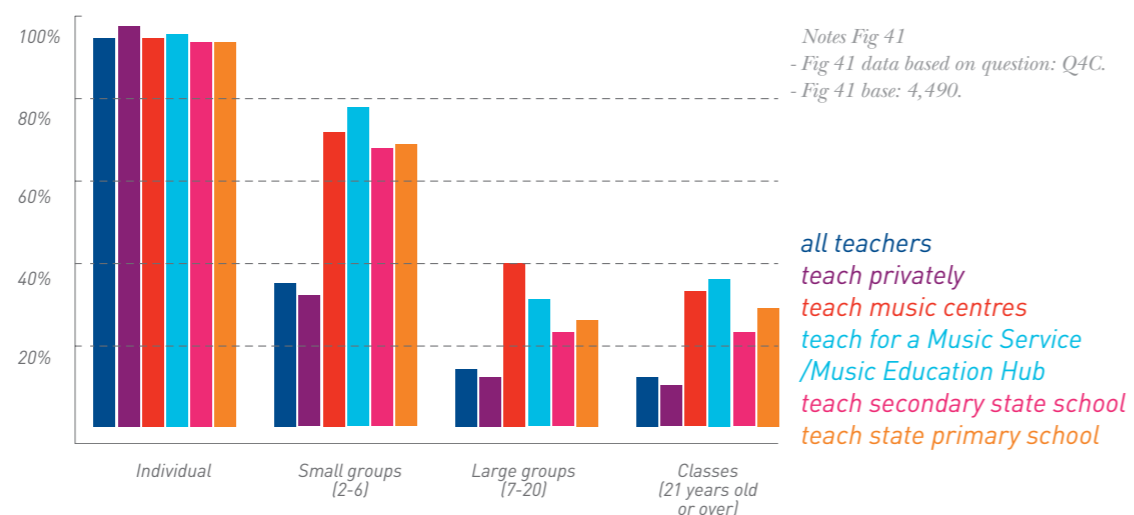


Fig 41. Teaching environment: individual, group and class teaching by teacher type Teachers



While the vast majority of teachers surveyed teach students individually, those teaching in state schools and for Music Services and Music Education Hubs do significantly more group teaching (see Fig 41).

Just under 20% of those surveyed conduct whole-class ensembles where the most common instrument taught is recorder. Singing is also used extensively as a whole-class activity (see Fig 44, page 36). 60% stated that their class ensemble programmes last for a year and 19% stated they last only for a term.

Fig 42. Whole-class ensemble lessons: students who continue lessons in the same instrument Teachers

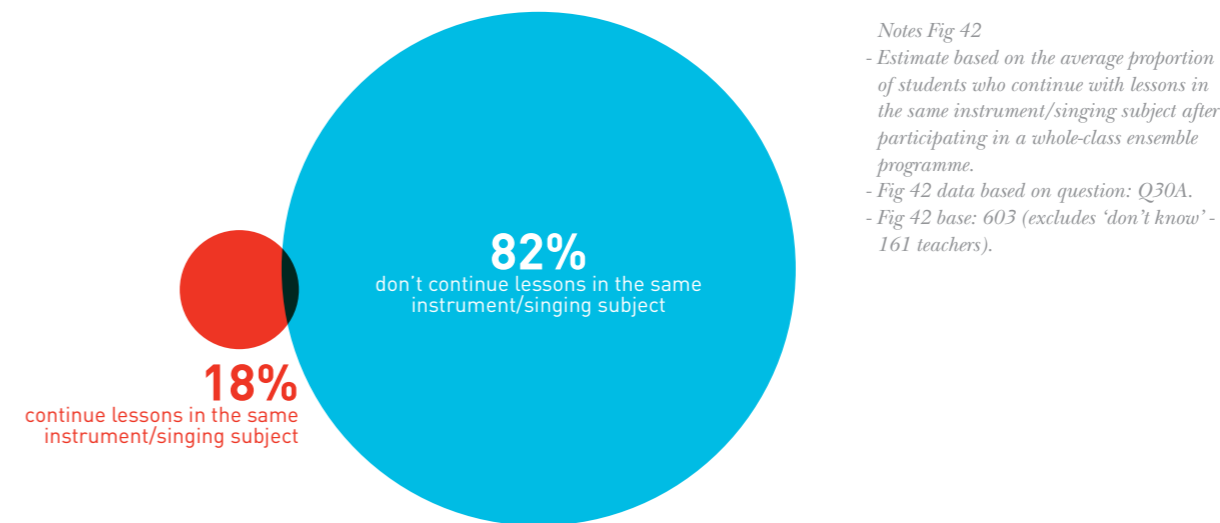
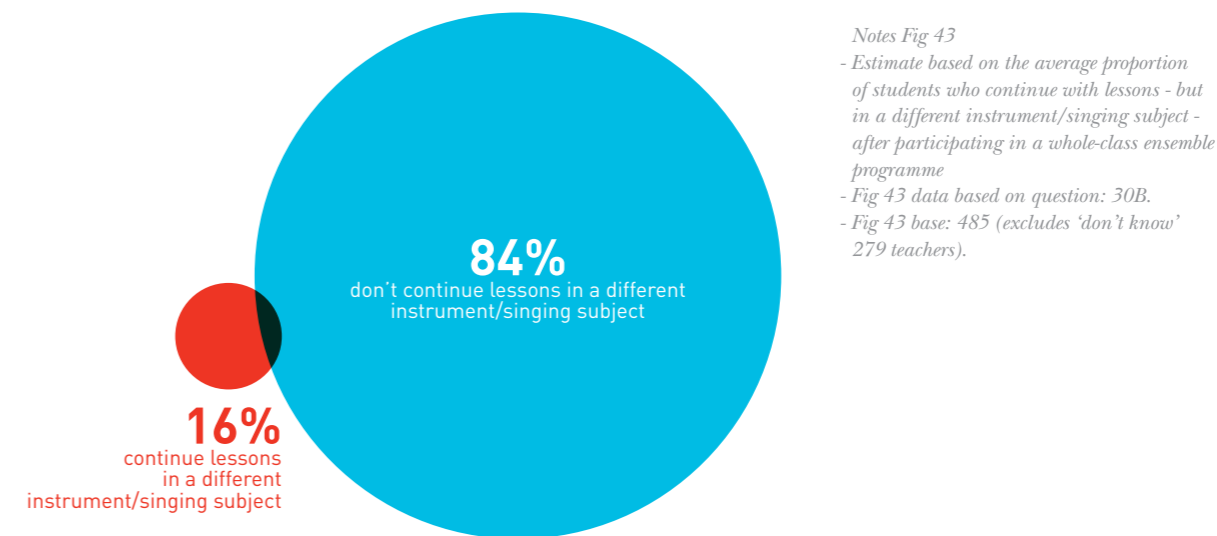


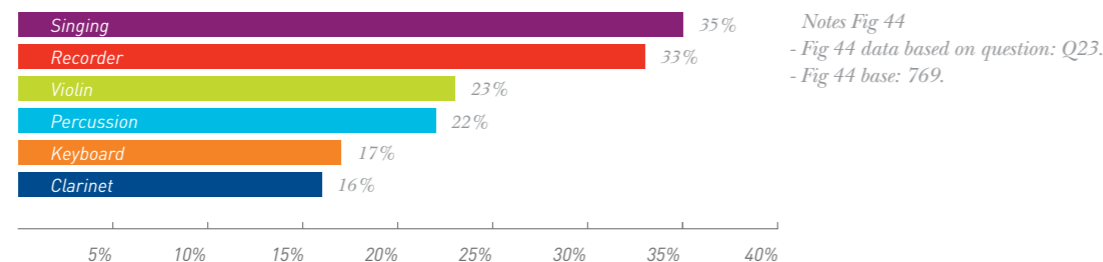
Fig 43. Whole-class ensemble lessons: students who continue lessons in a different instrument Teachers



When asked what proportion of students go on to take lessons after their whole-class ensemble experience, around one third of teachers did not know. Of those that did, only 18% of their students go on to take lessons on the same instrument. The proportion is smaller still (16%) when it comes to learners continuing lessons on a different instrument (see Figs 42 and 43, page 35). One interpretation of this is that the instruments available or offered to learners in the whole-class ensemble experience are not necessarily those which learners themselves would select if given a choice.

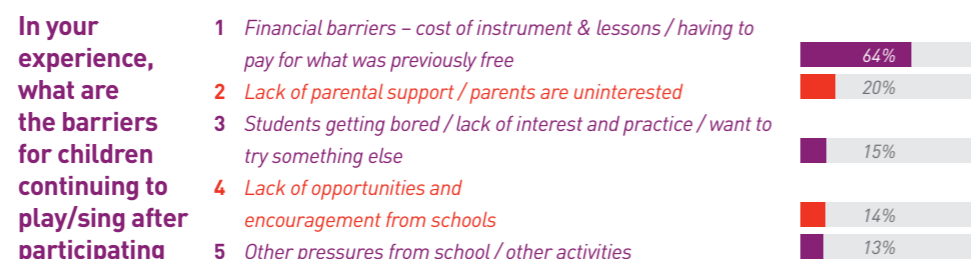
When asked to identify barriers that prevent children continuing to play or sing after participating in whole-class ensemble programmes, a majority of teachers (64%) cite the cost of instruments and lessons. An even greater percentage of those who teach in state schools (70%) believe cost is the primary reason why learners do not continue.

Fig 44. Whole-class ensemble lessons: top subjects taught Teachers



Notes Fig 44
- Fig 44 data based on question: Q23.
- Fig 44 base: 769.

Fig 45. Whole-class ensemble lessons: barriers to continuation after participating in a programme Teachers



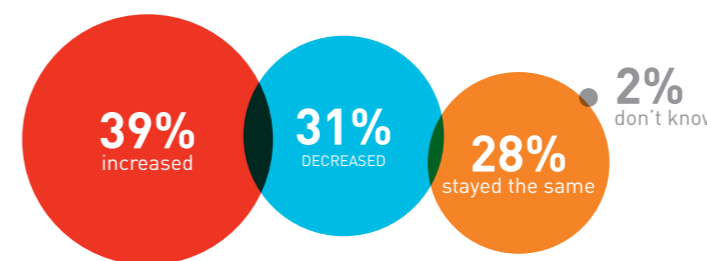
Notes Fig 45
- Fig 45 data based on question: Q31.
- Fig 45 base: 764.
'Cost. Peer group perception. Lack of parental vision and support. The whole-class model is sometimes not an enjoyable experience and puts them off doing any more music'

'There is no real system of progression in the Wider Opportunities programme. The very keen, able students are not always catered for.'

Over the last five years, 31% of teachers say they've seen a decrease in student numbers. Many cite parents being unable to afford lessons and other activities competing for students' attention.

These are significant issues for state primary and secondary school teachers. However, 39% have seen an increase in student numbers, mainly as a result of gaining students naturally by word of mouth or by increasing the number of hours they teach.

Fig 46. Student numbers: increased, decreased or stayed the same over last 5 years Teachers



Notes Figs 46, 47 & 48
- Fig 46 data based on question: Q7.
- Fig 46 base: 4,491.
- Fig 47 data based on question: Q9A.
- Fig 47 base: 1,736.
- Fig 48 data based on question: Q9B.
- Fig 48 base: 1,399.

Fig 47. Student increase: why student numbers have increased over last 5 years Teachers

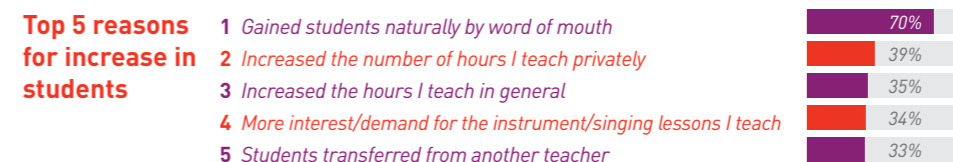
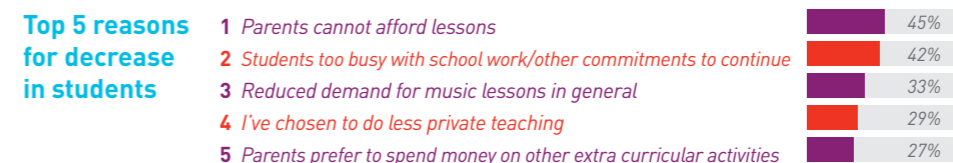


Fig 48. Student decrease: why student numbers have decreased over last 5 years Teachers



SUMMARY

Instrumental and singing teachers are remarkably fulfilled professionally, reflecting the rewarding nature of their work and their enjoyment of teaching. Peripatetic teaching can offer great flexibility around family life or within a diverse portfolio career, with the opportunity to work in different teaching environments. However, almost half of the teachers surveyed identify negative aspects of their work, with a lack of support from schools and parents plus poor motivation from students being among the most common. A large majority of those teaching whole-class ensembles see the cost of lessons and instruments as the principal barrier to learners continuing to play.



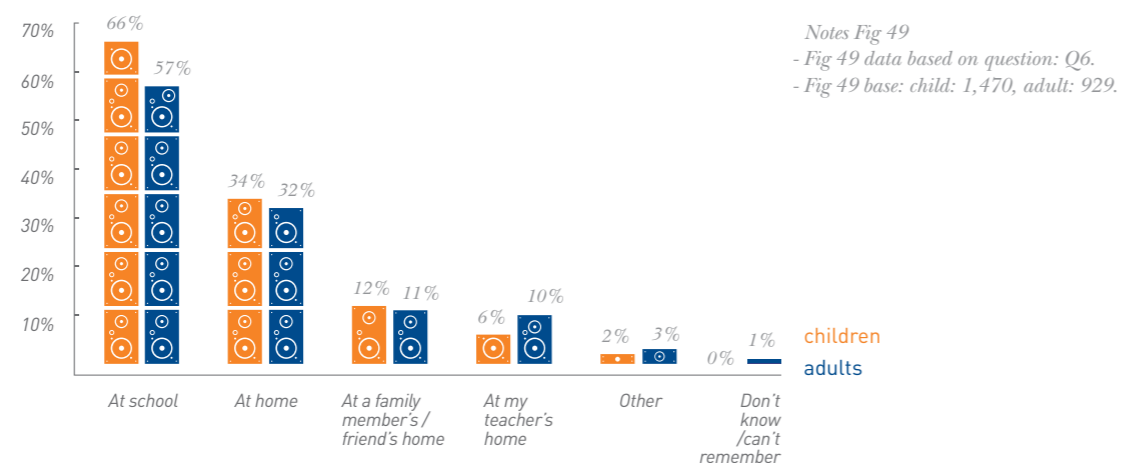
'The satisfaction of playing well and other people enjoying it'

- A learner responding to what they enjoy most about making music.

4 The statistics: part 4

HOW LEARNERS LEARN

Fig 49. Instrumental playing: where they first learned to play an instrument **Child and adult learners**



The level of engagement in the UK with music learning is impressive – and the importance of the contemporary school experience is paramount. More children than adults now start to learn music in a school context (see Fig 49), suggesting that attempts to improve first access over the last two decades are proving successful. After a period of decline throughout the 1990s, this is a welcome development.

91% of child respondents have engaged in music making in the last two years – from instrumental playing and singing lessons to making music with a smartphone or tablet. But although 77% of children are engaged in group singing/playing activities in school (see Fig 50), the formal learning route is just one avenue they explore to support their musical curiosity. Half of all children surveyed have also sung or played on their own, one in five has performed to an audience and 12% have written and sung their own songs. Some 40% are making music outside of school with friends and 20% have made music using a smartphone or tablet.

Learners are taking more control of their own music making. More than two thirds of children are involved in the decision to play an instrument (see Fig 52, page 42), with enjoyment of music, wanting to learn and the sound quality of an instrument being the most popular reasons for taking one up.

Role models are an important factor with almost a quarter (24%) of child participants opting to play an instrument after seeing someone else play one. The dominant profile of pop music over other genres in digital and traditional media – coupled with young people's independent access to these channels – is reflected in the increasing take-up of musical instruments associated with popular music genres.

Fig 50. Singing and playing: group activity inside school **Child learners**

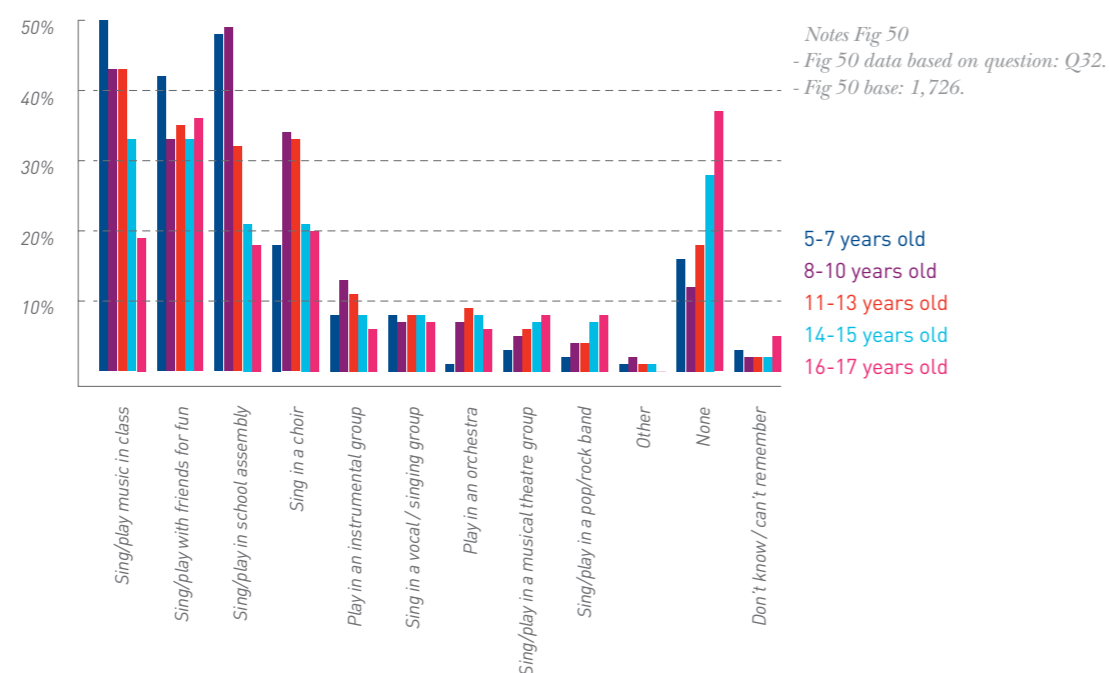


Fig 51. Instrumental playing: motivations to play an instrument **Child and adult learners**

Reasons for starting to play a musical instrument

- 1 I enjoyed music and wanted to play an instrument
- 2 I liked the sound the instrument made
- 3 I thought playing would be a good skill to have
- 4 I saw someone playing and wanted to try
- 5 My parent/guardian wanted me to play
- 6 Someone in my family played an instrument
- 7 I started to play after singing/playing music in school
- 8 My friend(s) played an instrument
- 9 I wanted to make music with other people
- 10 I wanted to play in a pop/rock band
- 11 I liked a famous person who played the instrument
- 12 I wanted to play in front of an audience
- 13 Other
- 14 Don't know

Reason	Children (%)	Adults (%)
1	40%	40%
2	30%	26%
3	24%	27%
4	24%	19%
5	16%	21%
6	20%	15%
7	17%	13%
8	16%	14%
9	14%	9%
10	8%	5%
11	7%	5%
12	4%	4%
13	4%	3%
14	4%	6%

Notes Fig 51
 - Fig 51 data based on question: Q9.
 - Fig 51 base: child: 1,470, adult: 929.

30% of children say their parents and guardians were involved in the decision to play an instrument. A lack of parental influence and involvement in such decisions suggests that young people have the confidence to make their own decisions and develop their own learning.

Fig 52. Instrumental playing: who decided they would learn an instrument **Child and adult learners**

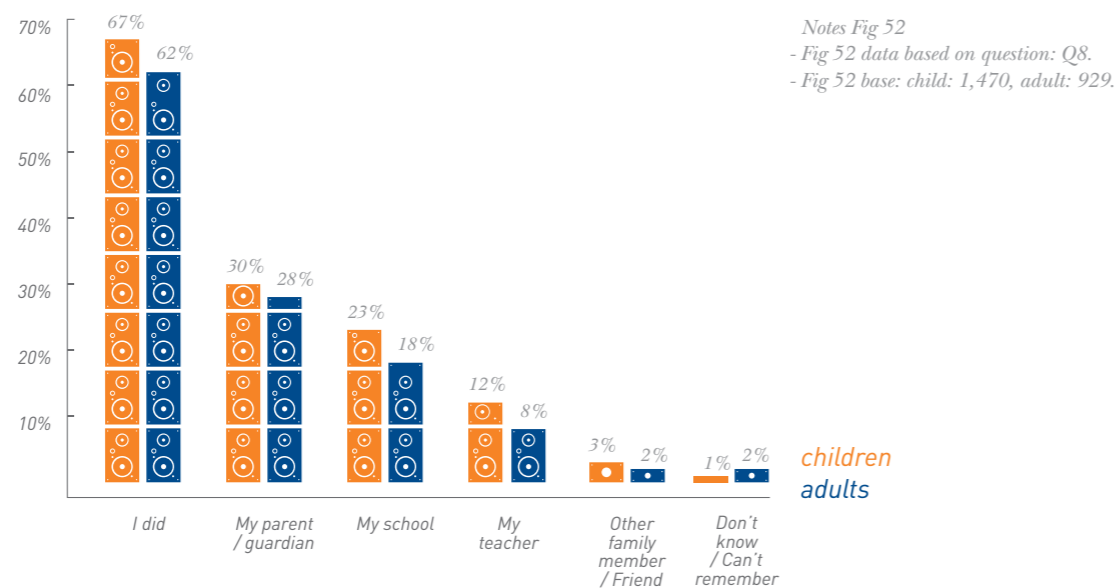
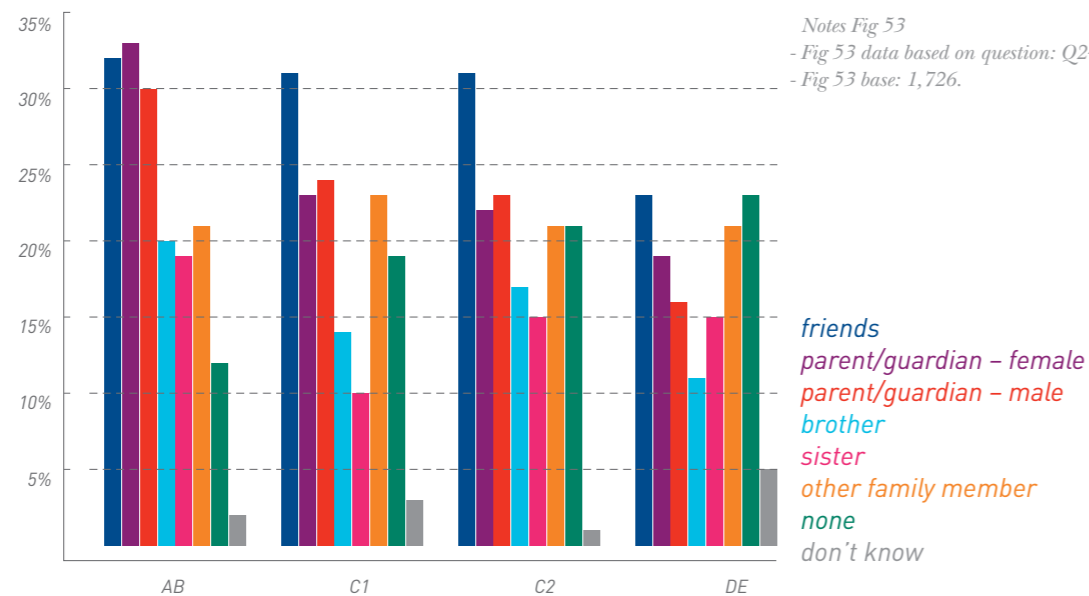


Fig 53. Instrumental playing: children with family and friends who play by social grade **Child learners**

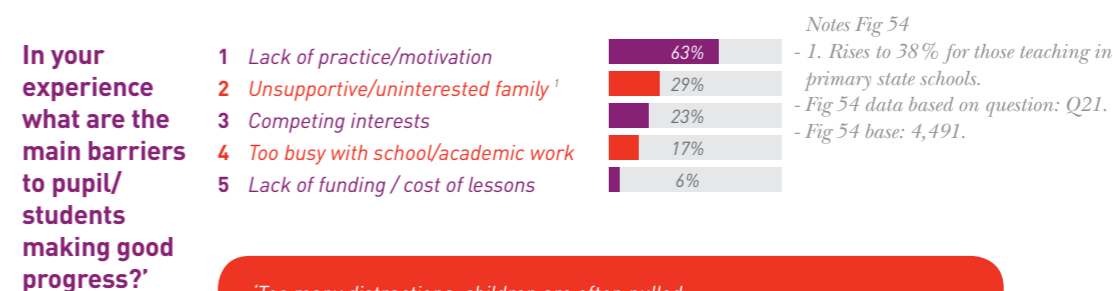


Parental involvement in the decision to learn an instrument falls by social grade – from 36% for children from AB backgrounds to 21% from DE households. Furthermore, for children who take private lessons, parental involvement increases to over 50%. This is understandable given the financial and time commitments that this can require. The social and financial challenges faced by parents from C1-DE social grades mean music tuition and instrument purchase are likely to be viewed as a challenge as well as an opportunity (see Fig 45, page 36).

Children from social grades C1-DE are less likely to have family and friends who play an instrument and this may provide one reason why they are less likely to start learning – given that one in five takes up an instrument because a family member plays (see Fig 53). Therefore children from households C1-DE may be more likely to be influenced by other musical and non-musical role models.

Overall, 63% of teachers cite lack of practice and motivation as a barrier to progression. Furthermore, 29% report issues around unsupportive or uninterested family members as a particular issue for those teaching in state primary schools. This implies that teachers regard the support of parents as an important factor.

Fig 54. Progression: main barriers to students making good progress **Teachers**



In your experience what are the main barriers to pupil/students making good progress?

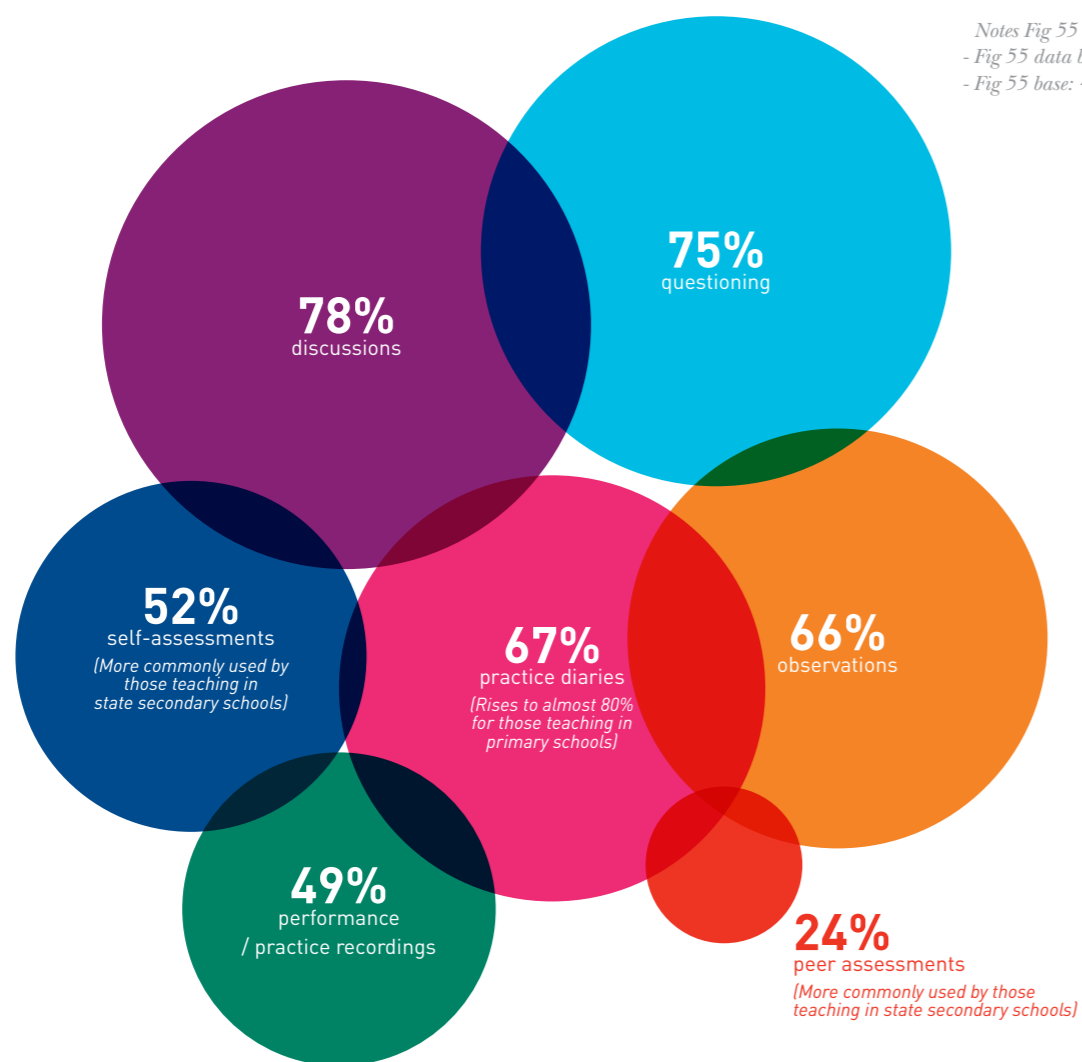
'Too many distractions, children are often pulled in several different directions with so many extra groups and activities to attend that they struggle to put in any effective time to progress.'

'Lack of practice, lack of support from parents/guardians, pupils taking on too many instruments or too many extra-curricular studies.'

'Over the years, pupils have come to expect near instant progress. They can buy a video game and get to the top level in weeks and they sometimes seem surprised that playing an instrument is not the same.'

Teachers use a range of tools and techniques to measure pupils' musical development. The majority of teachers employ discussion and questioning techniques with 67% also using practice diaries. This is particularly true for those teaching in state primary and secondary schools who are also more likely to engage in self and peer assessments.

Fig 55. Measuring development: formative assessment methods used **Teachers**

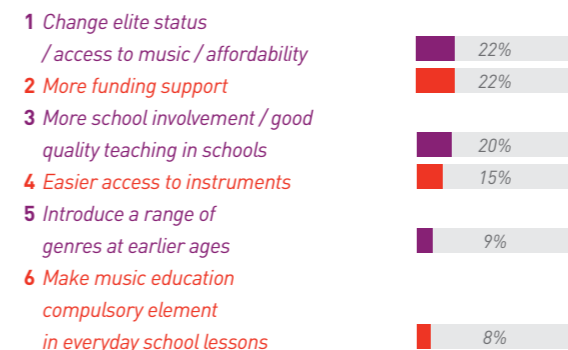


Notes Fig 55
 - Fig 55 data based on question: Q18.
 - Fig 55 base: 4,491.

More than one in five teachers cite perceptions of elitism and affordability as a barrier to progress. The same proportion believes that funding support is critical along with good quality teaching in schools.

Fig 56. The future: how to increase the number of children learning **Teachers**

If you could change one thing that might help increase the number of children learning a musical instrument/singing, what would it be?



Notes Fig 56
 - Fig 56 data based on question: Q34.
 - Fig 56 base: 4,491.

'Make a smoother transition from the child's whole-class tuition experience to having individual or small group instrument lessons'

'Creating more opportunities for children that can't afford music lessons currently.'

'Massive increase in funding for music provision in all schools, allied to more creative music teaching in secondary schools.'

SUMMARY

More children first learnt music in school than adults, suggesting that wider exposure to music in formal education contexts over the last 20 years has had a positive impact. Nearly all children surveyed are making music in some way: 20% have made music using a smartphone or tablet and 40% are making music outside of school: for fun, with friends, at festivals and in other ways. While advances in technology have made it possible to access more music than ever before, teachers do report that there are some major barriers to progression. These include a lack of motivation, lack of family support, competing interests and school work, and the cost of lessons. Children from socio-economic grades C1-DE continue to be disadvantaged.

5

What the research tells us

BEHIND THE STATISTICS

Making Music offers an insight into the current realities of music learning and teaching in the UK. This insight is a reflection not only of the statistics but also of the views of our research partners from across the music education sector and the many teachers and learners who took part in the surveys.

While numbers can highlight trends and reveal changes to patterns of playing, teaching and learning, to understand why those trends are appearing and what those changes mean we need to take into account a range of individual experiences and opinions. This section draws on those experiences and opinions, gathered through our surveys, through one-to-one interviews and through roundtable discussions, to provide context and a more rounded picture of instrumental playing, teaching and learning in the UK today. It is a picture of unprecedented engagement, with more people than ever before playing instruments (often more than one) and actively making music.

But it is also an uneven social and geographical picture in terms of access, provision and progression, as well as in terms of the quality of teaching and learning. Despite concentrated investment in first access music provision at school, only a small minority of young people go on to learn through formal music education progression routes. Those who do are significantly more likely to be from social grades AB than from grades C1-DE.

In the words of one teacher respondent: 'Generally cost of shared or individual lessons to parents is the main factor as to whether pupils can move forward with their chosen instrument – this is far more apparent in the state schools.'

Another said: 'In schools where music is prioritised and invested in, it is always the case that instrumental teaching has enough school and parental support to flourish. In places where Music Services and Music Education Hubs are not supported financially by local authorities, or spend much of their time dealing with bureaucracy and fundraising, I believe instrumental teachers will always struggle. Music is not prioritised enough in the state education curriculum and this of course has a negative effect on a child's appreciation of music and their desire to make music.'

'Much of my whole-class teaching is in areas of social deprivation, and parents are both unable to afford to fund lessons and also are not familiar themselves with instrumental tuition, so it is not something they consider continuing,' said another respondent.



Yet the sheer number of young people making music in alternative settings suggests a huge enthusiasm from children to play instruments – and that the formal routes and experiences they are offered through formal music teaching provision sometimes fall short.

What can be done to address these challenges? Why is so much good work being done in some places and not others? What is the impact of funding pressures on the front-line delivery of high quality musical experiences for all – and should resources be more strategically allocated to rebalance this? Does the increasing take-up of pop music instruments threaten the future of our orchestras and classical ensembles or is it an opportunity to create new and more diverse types of ensembles that can co-exist alongside established groupings? Can and should the music education sector make more strategic use of digital technologies to help signpost, steer and monitor music learners through clearer progression routes and music making opportunities? And what needs to happen to ensure teachers are appropriately trained and equipped to meet the evolving demands of learners in this changing environment?

Progression

There are divergent views about what ‘progression’ means in the music education context. One contributor describes the nature of musical progression as ‘essentially chaotic’, while others view the wider diversity of progression routes now available as positive.

Feedback from our research partners suggests that uneven regional provision is an important factor in progression, as learners’ decisions may be influenced not by preference but by availability. Musicians live where the work is and there may be whole geographical areas with no teachers of some instruments.

With decreasing funding from local authorities for the arts, in the context of funding cuts from central government, the role of Music Education Hubs has taken on greater significance in ensuring children can progress. But pressure on Music Education Hub funding coupled with diminishing local authority budgets may threaten to widen regional inequalities even further. This needs to be addressed at national level and should also be reflected in funding priorities⁵.

Learning in schools

There is clear evidence that learners – particularly those in the transition from primary to secondary school – are disengaging from formal structures while maintaining a passion for music in informal settings.

Several factors are at play here. One identified by teachers themselves – and supported by other contributors to this research – is that schools are continuing to undervalue music. This is fed by a perception across the sector (rightly or wrongly) that policy and assessment guidelines are inconsistent and undermine creative and cultural learning. Teachers repeatedly point to a lack of support from school leaders who – under pressure to deliver on literacy and numeracy – are less interested in creative and cultural learning despite strong evidence of the benefits

of a holistic curriculum to learners and school culture in general. It would appear that important research findings that demonstrate the benefits of music learning have not been sufficiently communicated or are not convincing enough and that there is a need for greater advocacy for music education, especially within schools.

Whole-class ensemble music learning – while providing early experience – is not translating into an increased commitment to formal learning.

One teacher said: ‘The projects in the schools are free of charge for parents and organised by the school. When continuing, parents have to pay for it and have to organise it. Both I found to be factors that prevent continuation.’

With the introduction of School Music Education Plans from September 2014, Music Education Hub representatives will be helping to support young people’s choices at KS2 class level. But there may be a danger in relying on Music Education Hubs to continually do more when their funding has been reduced over recent years (see footnote, page 48).

The lack of ongoing engagement in formal learning structures suggests that the quality of classroom music teaching may be less engaging than it could be – or that the arts are being undermined by a focus on core curriculum subjects. This is a contentious area – not least when there is evidence that teachers are working longer hours and (in both the public and private sectors) often for less pay. But it is evident from the findings of this report that – although the reasons are numerous and complex – the transition from primary to secondary school sees a dropping off of musical engagement.

Although much primary music teaching is exceptional, according to Ofsted⁶, there is also a need for better teacher training and continuing professional development. Initial teacher training and PGCE courses typically provide just eight hours on music teaching; students need greater opportunities to work in the classroom alongside more experienced colleagues in order to adequately fulfill their obligations as music teachers.

5. The announcement on 22 July 2014 of £18m of additional funding for Music Education Hubs in England is a welcome development. But this is in the context of falling investment since 2010. 2010/2011 - £82.5m. 2011/2012 - £77m. 2012/2013 - £75m. 2013/2014 - £63m. 2014/2015 - £58m

6. Music in schools: wider still, and wider – Quality and inequality in music education 2008-11. Ofsted. March 2012.

6

Key themes and recommendations

NEXT STEPS

This report is the result of a major collaboration between individuals and organisations deeply involved in music education across the UK. The conclusions drawn from this research have led those involved to look at the key messages that have emerged and to offer the following suggestions:

Next steps for the music education sector

- Articulate a more coherent message about progression routes in musical learning, and the possible routes available for young people at all stages – this requires much greater collaboration and coordination among schools, private teachers, Music Services, community music and national organisations.
- Implement more rigorous monitoring processes so that learners' development and progress can be more effectively mapped, helping identify the most effective strategic support and practical interventions.
- Champion the role of music and music specialists so head teachers and governors truly understand the positive impact they can make.

Next steps for policy makers and funding

- Champion the role of creative learning in schools as part of the inspection framework – this would strengthen head teachers' perceptions of music as an important contributor to school culture, outcomes and achievements for young people and attainment results.
- More effectively target and align funding, to support disadvantaged learners from social grades C1, D and E, address regional imbalances, and ensure a more equitable supply of diverse instruments UK-wide.
- Sustain and further enhance funding to Music Education Hubs in England to ensure they are able to meet the high ambitions set out for them.
- Increase exposure to music at initial teacher training level to ensure new entrants to the profession are adequately skilled to fulfill their statutory obligations, particularly at primary level.

Next steps for schools and teachers

- Continue to provide a rich mix and depth of musical styles, repertoire and experiences in the classroom that engage young people and meet their own expectations.
- Monitor learners' progress more effectively to better identify both their individual needs and the resources and support required to meet them.
- Encourage greater collaboration between teachers working across the private and public sectors – this would encourage better sharing of good practice and go towards ending the isolation teachers can feel.
- Undertake regular and targeted continuing professional development via existing support structures – this requires greater collaboration between competing commercial and non-profit stakeholders.
- Advocate the benefits of music education with parents and carers to ensure better understanding and garner more support.



A final word **Our Making Music report clearly demonstrates that there is a lot to celebrate in the field of instrumental teaching, learning and playing in the UK. It is our challenge to ensure that the findings of this report will galvanize and inspire those within our sector – and those who have the power – to influence, change and further improve the circumstances in which children and adults engage with music.**

ABRSM & all of our Making Music partners



Appendix

Learner survey: adult (18 years+) and children (5-17 years)

- SC.** Please indicate which one of the following best describes the occupation of the chief income earner in your household? If retired, which one of the following best describes the previous occupation of the chief income earner in your household? Base: All adult/child respondents (1,255/1,726*)
*Question completed by respondent's parent/guardian.
- S4.** Are you...? Female/Male Base: All respondents (2,981)
- S5.** Please type in your age. Base: All respondents (2,981)
- Q1.** Where do you live? Base: All adult/child respondents (1,255/1,726)
- Q3.** Do you know how to play any musical instruments? It doesn't matter how well you can play. Base: All adult/child respondents (1,255/1,726)
- Q4.** Have you ever learned to play a musical instrument? Base: All adult/child respondents who don't know how to play a musical instrument at Q3 (598/412)
- Q5.** Which musical instrument(s) do you know how to play / did you learn to play? Base: All adult/child respondents who know how/have learned to play an instrument at Q3/Q4 (929/1,470)
- Q6.** Where did you first learn to play a musical instrument? Base: All adult/child respondents who know how/have learned to play an instrument at Q3/Q4 (929/1,470)
- Q8.** Who decided that you would learn to play a musical instrument? Base: All adult/child respondents who know how/have learned to play an instrument at Q3/Q4 (929/1,470)
- Q9.** Why did you start playing a musical instrument? Base: All adult/child respondents who know how/have learned to play an instrument at Q3/Q4 (929/1,470)
- Q10.** Do you still play your instrument(s)? Base: All adult/child respondents who know how/have learned to play an instrument at Q3/Q4 (929/1,470)
- Q13.** And what are the reasons why you stopped playing your instrument(s)? Base: All adult/child respondents who no longer play all instruments at Q10 (500/275)
- Q14.** Have you ever taken any musical instrument lessons either at school or privately? Base: All adult/child respondents who know how/have learned to play an instrument at Q3/Q4 (929/1,470)
- Q15.** What are the reasons why you have never taken musical instrument lessons? Base: All adult/child respondents who have not had instrumental lessons at Q14 (279/381)
- Q16.** Where do/did you take your instrumental music lessons? Base: All adult/child respondents who have had instrumental lessons at Q14 (617/1,073)
- Q18.** And are you currently taking any instrumental lessons either at school or privately? Base: All adult/child respondents who have had instrumental lessons at Q14 (617/1,073)
- Q20.** What are the main reasons why you have not learned to play a musical instrument? Base: All adult/child respondents who don't know how/have never learned to play an instrument at Q3/Q4 (326/256)
- Q24.** Do you have any friends or family members who play or have played a musical instrument? Base: All child respondents (1,726)
- Q32.** In the last 2 years, what type of group singing or instrumental playing have you done at school/college? Base: All child respondents (1,726)
- Q34.** Thinking about other ways of making music, what other activities have you done in the last 2 years? Base: All child respondents (1,726)
- Q37.** Have you ever taken a music exam? Base: All adult and child respondents (1,255/1,726)

Learner survey: tracking charts – children (5-14 years)

Question numbers correspond to the 2014 survey. See 'About this report', page 6.

- Q3.** Do you know how to play any musical instruments? It doesn't matter how well you can play. Base: All child respondents (1993: 861, 1996: 784, 1999: 927, 2014: 1,487)
- Q5.** Which musical instrument(s) do you know how to play? Base: All child respondents who know how to play an instrument (1999: 382, 2014: 1,123)
- Q16.** Where do/did you take your instrumental music lessons? Base: All child respondents who have had instrumental lessons (1993: 278*, 1996: 237*, 1999: 272, 2014: 839)
*Original data tables unavailable. Calculated from the published reports in 1994 & 1997

Teacher survey: instrumental/singing teachers

- S3.** Thinking about your involvement in music teaching and exams, which of the following applies to you? Base: All teachers (4,491)
- Q1.** What musical instruments / subjects do you teach? Base: All teachers (4,491)
- Q3.** How many hours do you spend teaching instrument(s)/singing in an average week? Base: All teachers (4,491)
- Q4A.** Where do you teach instrumental/singing lessons? Base: All teachers (4,491)
- Q4B.** And roughly how many students are you currently teaching instrumental/singing lessons? Base: All teachers that teach in at least one location at Q4A (4,490)
- Q4C.** How many instrumental/singing students do you teach at a time within lessons? Base: All teachers (4,491)
- Q7.** In general, has the number of instrumental/singing students you teach increased, decreased or stayed the same in the last 5 years? Base: All teachers (4,491)
- Q9A/B.** And why do you think your student numbers have increased/decreased? Base: All teachers that have had an increase/decrease at Q7 (1,736/1,399)
- Q12.** What first motivated you to become an instrumental/singing teacher? Base: All teachers (4,491)
- Q13.** What other paid work do you do in addition to your instrumental/singing teaching? Base: All teachers (4,491)
- Q18.** Formative assessment is typically ongoing to support learning and help diagnose next steps; it may be informal or formal. What formative assessment methods do you use with your instrumental/singing students? Base: All teachers (4,491)
- Q20.** As well as accredited and formative assessments, what other indicators do you use to judge if a pupil is making good progress? (E.g. playing more demanding repertoire; playing repertoire from different genres and styles; playing in an ensemble; composing and improvising.) Base: All teachers (4,491)
- Q21.** In your experience, what are the main barriers to pupils/students making good progress? Base: All teachers (4,491)
- Q22.** Thinking about teaching music in schools, do you teach whole-class ensemble lessons? (E.g. first access/wider opportunities/Youth Music Initiative.) Base: All teachers that teach in schools at Q4A (2,497)
- Q23.** And which instrument/singing subjects do you teach in your whole-class ensemble lessons? Base: All teachers that teach whole-class ensembles (769)
- Q24.** On average each year, approximately how many children do you teach in all of your whole class ensemble lessons combined? Base: All teachers that teach instruments in whole-class ensembles at Q23 (764)
- Q25.** How long does the whole-class ensemble programme in which you teach normally run for? Base: All teachers that teach instruments in whole-class ensembles at Q23 (764)
- Q28.** On average, how long are the whole-class ensemble lessons that you teach? Base: All teachers that teach instruments in whole-class ensembles at Q23 (764)
- Q29.** On average what percentage of your teaching week is devoted to whole-class ensemble lessons? Base: All teachers that teach instruments in whole-class ensembles at Q23 (764)
- Q30A.** We are interested in understanding how many students go on to take further instrumental/singing lessons after taking part in a whole-class ensemble programme. In your opinion, roughly what proportion of your students go on to take lessons in the same instrument/singing subject? Base: All teachers that teach instruments in whole-class ensembles at Q23 (764)
- Q30B.** And roughly what proportion of students go on to take lessons in a different instrument/singing subject? Base: All teachers that teach instruments in whole-class ensembles at Q23 (764)
- Q31.** In your experience, what are the barriers for children continuing to play/sing after participating in whole-class ensemble programmes? Base: All teachers that teach instruments in whole-class ensembles at Q23 (764)
- Q32.** Taking everything into account about your music teaching in general, how professionally fulfilled are you in your work? Where 0 is very unfulfilled and 10 is highly fulfilled? Base: All teachers (4,491)

- Q33. Why did you give a score of (0 - 10) for professional fulfillment? Base: All teachers that scored (0 - 10) for professional fulfillment at Q32 (4,441)
- Q34. Thinking generally about UK music education, if you could change one thing that might help increase the number of children learning a musical instrument/singing, what would it be?
Base: All teachers (4,491)
- Q35. Are you...? Female/Male Base: All teachers (4,491)
- Q36. Please indicate your age range. Base: All teachers (4,491)
- Q37. Which of the following music related qualifications do you hold? Each qualification should be in or related to music (E.g. Diploma in Music Performance or Performing Arts.) Base: All instrumental/singing teachers (4,491)

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