

LEARNING, PLAYING AND TEACHING IN THE UK IN 2021

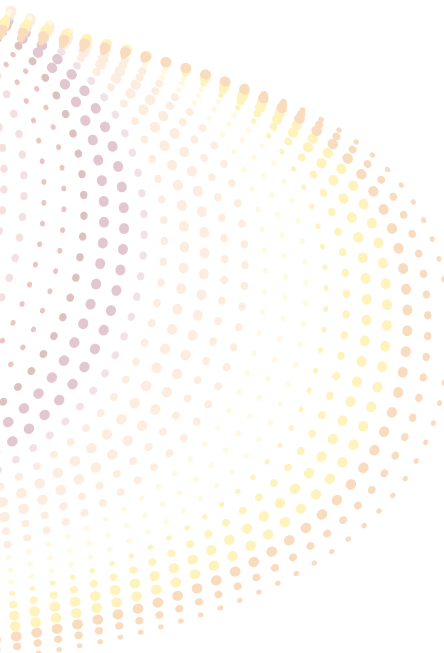
ABRSM Making Music Report 2021





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Foreword

I am delighted to introduce ABRSM's latest Making Music report. After 18 months of unprecedented challenges created by the pandemic, ABRSM Making Music 2021 arrives at a time of new and tangible energy and optimism across many areas of music education.

Many of us are sharing a renewed sense of what learning music can really do for us all – and new understanding of the digital opportunities available. For many of us too, there is a simple and irreplaceable delight that has come with the freedom to once again experience live music, as ensembles reform and audiences return.

It's fascinating to read this report from these perspectives and to analyse the changing landscape of music education in the United Kingdom over the past 27 years.

Encouragingly, music participation remains very high, with more than eight out of every ten children making music in some way. Nevertheless, the drop-off in the teenage years remains stark at a time when the popularity of STEM subjects arguably leaves less time for arts subjects.

This is concerning given the importance of the creative industries to the UK economy (£111.7 billion in 2018 according to the DCMS) and the international reputation that the UK has as a leader in music creativity and performance.

There is hope, though, with signs of recognition of the value that making music brings. The Scottish government has recently announced increased funding for music education, ensuring free music tuition for all school pupils. The Welsh government too is planning a National Music Service for schools to "make sure that lack of money will no longer be a barrier to young people learning to play an instrument". In England the new Model Music Curriculum sets out an ambitious agenda to revitalise music in schools.

As in so many aspects of life, the pandemic has had an impact on music making, with over a third of parents reporting their children taking up an instrument in lockdown and two thirds saying their children have increased their music practice. Even before the pandemic, two thirds of children were already supporting their music learning through use of digital tools such as YouTube, smartphone recordings and online courses. This trend accelerated over lockdown and will surely endure beyond it.

Another change, perhaps stimulated through social media and availability of rich media resources, is for increasing numbers of young people to self-learn and make music informally with friends and small groups rather than through formal teaching.

As a music education charity, ABRSM is at the forefront of addressing many of the issues that this report raises. Among other things, we support eight music charities in the UK; we sponsor diversity in music composition through our Mentor Scheme; we provide scholarships to exceptional students at the Royal Schools of Music, and we are investing in classroom music resources and the development of music teachers.

Like everyone else, we too are investing in new technologies to enhance what we do and better support our stakeholders. I'm delighted by the demand for our digital exams and the response we have had to our innovations in this area, which have sought to put the learner at the centre and to develop our assessments in ways that increase flexibility and choice, while maintaining educational excellence.

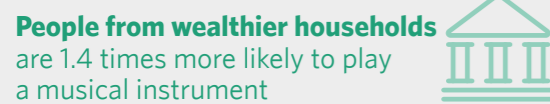
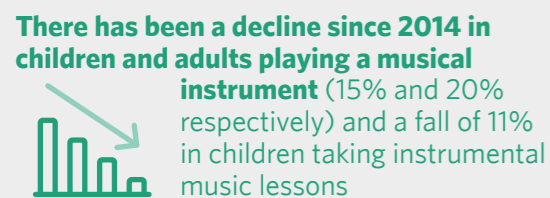
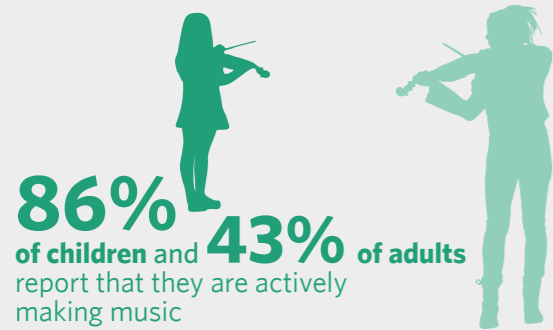
I am pleased to report that over 425,000 candidates worldwide have been examined in the year since our new exams were launched and pleased also with the range of opportunities which our digital exams and traditional offer of live exams together provide.



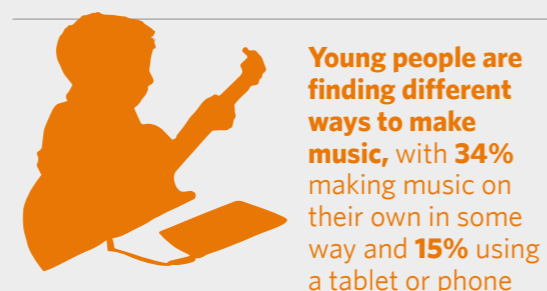
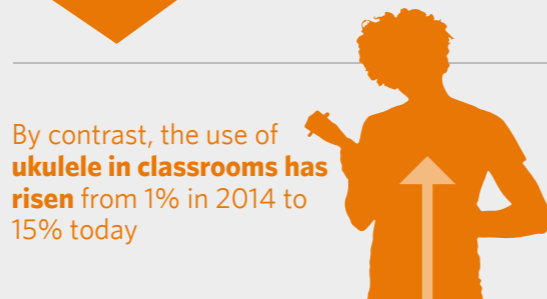
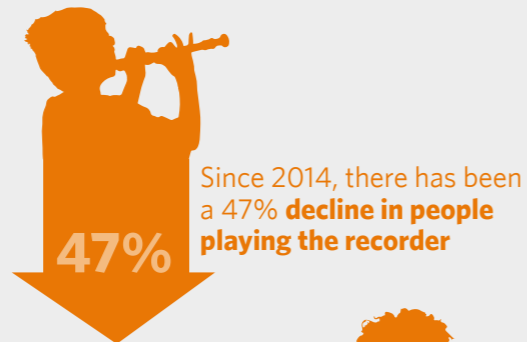
Chris Cobb
Chief Executive, ABRSM

Making Music 2021 Data Summary

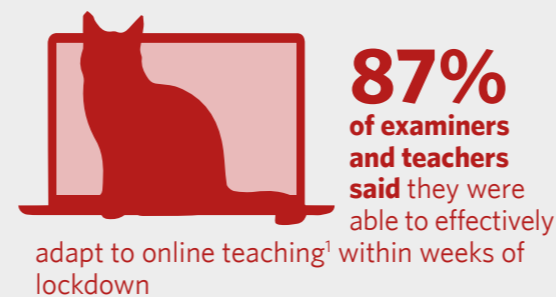
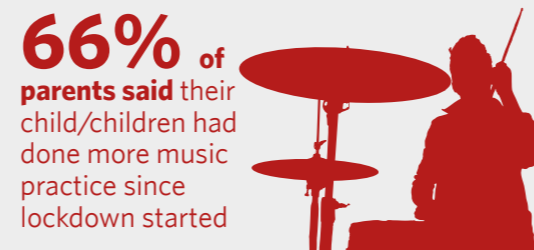
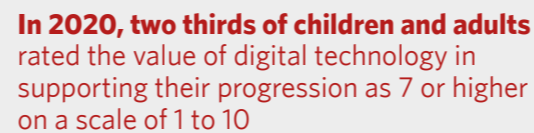
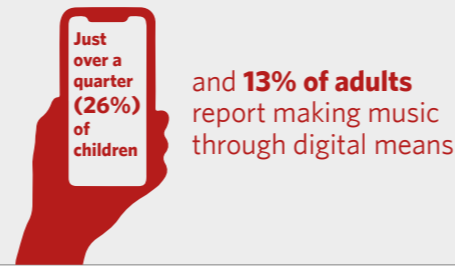
Are we Making Music?



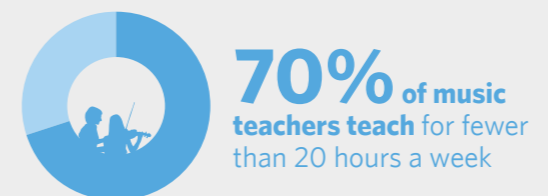
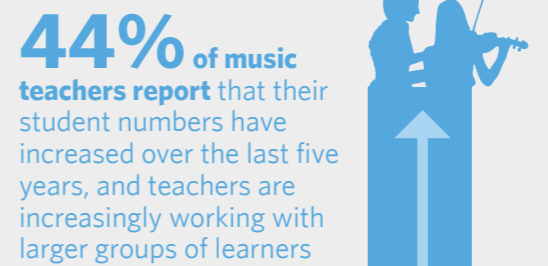
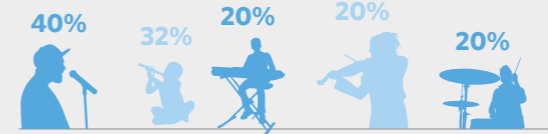
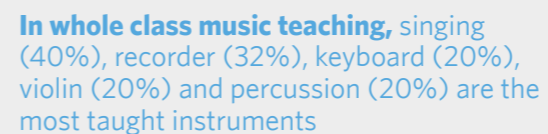
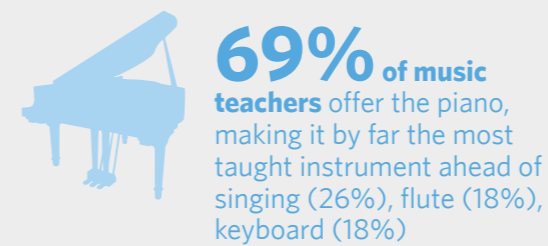
How are we Making Music?



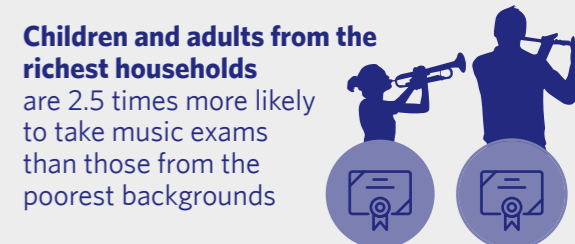
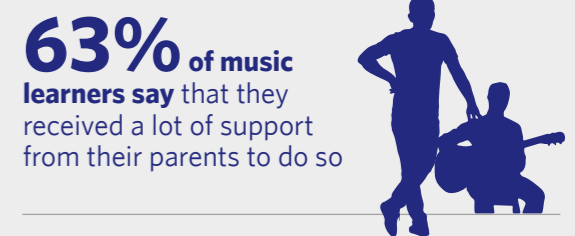
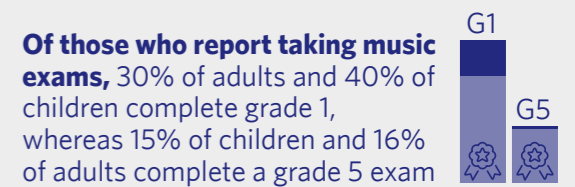
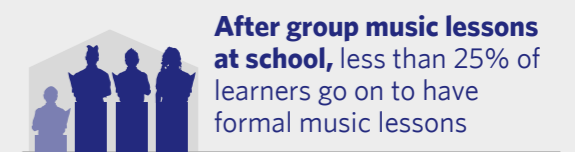
Digital Music Making



How is Music Taught?



How can we Make Progress?



Introduction

ABRSM Making Music: Learning, Playing and Teaching in the UK 2021 is the largest survey of its kind in the UK. At ABRSM, we have committed to undertaking these surveys over the last 27 years because we care deeply about supporting all musicians to be the best they can be. Our mission is to inspire musical achievement and to do that to the best of our ability we need to regularly update our understanding of how music is made, learned, and taught. Moreover, we want to share what we learn so that music makers, teachers, parents and carers, schools, music organisations and decision makers at every level can also use this information to support high quality music education.

The bulk of the data collection for ABRSM Making Music 2021 was conducted in 2020 just prior to the pandemic. Clearly, the last year has affected us all in unimaginable ways and it has also influenced how we make and learn music. It is for this reason that we wanted to wait until the effects of the pandemic on music making could also be assessed before releasing this report. To this end, we have included a special section on digital teaching and learning and included some data on music making during lockdown.

Not surprisingly, the last year has seen a massive shift to online music making. However, our data shows that this trend that was already well underway with the pandemic merely accelerating what was taking place as can be seen in other areas of life. In fact, for the first time even before the pandemic, we are seeing a large rise, especially among the young, in people finding new avenues to make, share and practise their music. The use of technology, of smartphones, apps, social media, and video tutorials is fundamentally changing the way music is learned and taught, and this in turn is affecting how and where music teaching takes place.

Encouragingly, ABRSM Making Music 2021 also shows that the general trend over the last 27 years of our surveys has been one of dramatic increases in participation on music making. Whilst the data from the 2014 edition of ABRSM Making Music looked to be a high-water mark, the numbers of both adults and children who are making music in some way, the latter at more than eight out of every ten, remain incredibly high.

However, the vast numbers of children who participate in group music making until the age of 11 and then, to 13, are simply not translating into sufficient numbers of young people choosing to continue to study music at school or to pursue formal music education routes such as taking music grades. Is there an image problem for music, is it not supported well enough by school leaders, or is it not seen as important enough as a subject of study by students and parents? It does seem from the data we have collected that more needs to be done to make learning music through formal routes more engaging for young learners after compulsory lessons stop. The data also suggests that more support is needed, especially for children in early years, to help parents to understand the value of music and to support them to nurture their children's interest. Amongst other barriers, both learners and teachers believe that the cost of learning music is too high, even if there are many local organisations prepared to meet the resource gaps that exist. If more parents and learners are to take up and continue learning music then where these barriers are real, they must be addressed and, where there is support, it must be communicated.

However, these concerns should not hide many positive stories told by the data we have collected. ABRSM Making Music 2021 shows that people are increasingly doing it for themselves. Incredibly high participation rates of 86% of children and 43% of adults are clearly a cause for celebration. We are increasingly seeing young people taking and making their music away from the classroom, not with private teachers, but often online, with friends in small groups or in music clubs. The figure for young people taking lessons “elsewhere”, meaning away from the classroom or private teacher, has almost doubled since 2014.

Yet, it is at school where nearly every child gets the chance to have a go at making music, and where many are nurtured by committed teachers and school leaders as young musicians. We know that the quality of this offer, and its potential to excite and enthuse young people is critical to whether they make a choice to continue learning, either at school or elsewhere. What goes on in the community can lead to more young people making music a choice to continue at school, and what goes on in school can create superb opportunities to grow and flourish in groups and with peers outside school. There is an interplay between these spheres which, if more people are to make progress and learn the craft of music, means these spheres need to work together, one signposting the other. Ultimately, this means connecting provision far better around the learner.

But the big story of ABRSM Making Music 2021 is in the rise of digital. If the pandemic has taught us anything, it is that digital now has a central role to play in how we access, share, learn and progress our music. It is now a fundamental part of the music education landscape, and we must ensure music education advances alongside these technological changes, alive to how people interact and connect and not playing catch up. If one warning were to come from the data in this report it would be that not embracing digital is a sure route to obsolescence for music education.

Of course, playing with others in the same space, sometimes watched by an audience, is an experience that is impossible to match. The thrill of performance, the communication with fellow musicians, and the reactions of those who are listening are uniquely exciting. But in terms of learning and practising, the world is changing fast. Some say we are looking at a much more blended future in which digital and physical music education complement each other, the former providing options for self-study and exploration and the latter for expert guidance and marking progress. We expect our next survey in around 2025 to see an explosion of access and richness in the digital music offer. Schools, music organisations, music teachers and those who support, and fund music education must embrace this shift. The future of music depends on it.

And, of course, digital should not become synonymous with divides. The pandemic put those without internet speeds and access to hardware at a severe disadvantage – and not just in terms of learning music. As in other spheres, music organisations, music educators and funders including government must make equality of access the principal consideration when developing and delivering music education services.

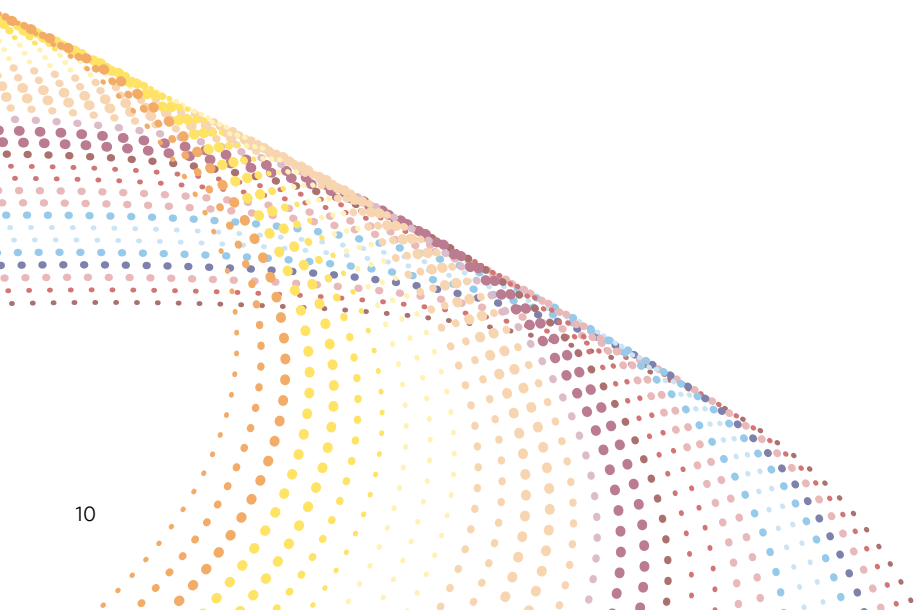
Regarding the workforce, two important findings from the research are, firstly, that the demographic profile of the music teachers has not changed significantly in the 27 years that ABRSM has been conducting this survey. A second key finding is that there are signs that the number of music teachers may be declining – given the data shows there is more work for those teachers in the system at the same time as a reduction in those taking music lessons. It appears that the music teacher population may be declining at a greater rate than those wishing to take lessons.

If so, this should also be seen as a warning – that on its own could threaten the UK's prominent global position as a leading music nation in years to come.

It may have been thought that increasing access to learning music would lead to a greater demand for music teachers and a broadening of the profile of the workforce. But these assumptions have been challenged by our data. If music education is to thrive, it needs music teachers able to appeal to all learners that reflect every facet of our society. And if learning music is to thrive, there is a need to attract a wider range of people into the profession and to support those who are already teaching music to prevent people leaving, to help access work and, to connect teachers to modern approaches to music teaching that students want.

Fundamentally, people learn music because they are motivated to do so when it excites them and sparks their enthusiasm. This is why people put the hours in and become advocates for learning music themselves. So, the challenge for the music education sector is to constantly prioritise the connections they make with individual learners, that can lead to discovery and craft, practice, and success. In the early years, parental support is so important. To surround children with music, to help them discover its basic elements, to support children as they play music at school and, if they can, to find options to make music outside school. ABRSM Making Music 2021 shows some trepidation among parents around the use of technology – and a need to involve and support parents around what they can do – whether they have a musical background or not – to help their child take those first steps and to continue to learn as they progress.

Despite the challenges, the good news is that we can succeed. ABRSM Making Music 2021 shows many positive trends, in access to music and in the choices learners are making, as well as indicating for the music education sector and decision makers where we must concentrate our efforts in the future. ABRSM Making Music 2021 shows that there are clear opportunities to transform music education, inspiring more young people to take up and continue their music making. Essentially, this is about meeting change head on, technologically, and in a way that ignites learners' curiosity, includes their own musical interests, gives them the opportunity to explore and find their own path to progress.



About the **ABRSM Making Music Survey**

The ABRSM Making Music report series provides a detailed picture of music education across 27 years. First proposed in 1993, the studies published in 1994, 1997 and 2000 helped make the case for state funding for music education, following major changes to education funding across the UK in the 1980s. A further edition was published in 2014, reflecting the positive impact of the National Plan for Music Education in England (NPME) and sustained investment by successive governments, and setting a high-water mark for music participation for children and adults. This new edition based on data collected in 2020 will help in evaluating whether the success seen in 2014 has been maintained.

This research was completed during a year that has seen the pandemic completely transform the lives of millions of people around the world including the UK and part of our data collection seeks to reflect those changes in relation to music teaching and learning. For the main survey, respondents were asked to answer questions on who is making music, what music they are making, how it is being taught, and what factors support or impede progress. The report draws on data collected from surveys conducted with children and adults. This includes an analysis of the profile of people who are playing musical instruments, their motivations, and the barriers they face. It also includes data from a survey with music teachers, including the profile of teachers and a picture of their working environments.

The report does not contain specific recommendations for changes as we want the data to speak for itself. However, the final section does look to the future. Using trends observed through the data, we look at how music education is likely to change and the conditions that might be required to support this change. The aim here is to highlight the opportunities we can take as a sector to make music education more engaging, relevant and inclusive. Others are encouraged to use this data and the associated data sets to take these considerations further. We will soon publish the data collected for this report as an open access resource.

Methodology

ABRSM worked with London-based research agency Critical Research to complete this study. Online omnibus surveys were used with a sample of teachers and learners to gather a wide range of information. Most of the questions in these surveys were identical to those used in 2014 so direct comparison is possible. In 2020, questions were added on the use of digital technology, and demographic questions about ethnicity and disabling barriers.

Critical Research recruited a representative sample children and adults to take part in the learner survey. Data collected has been weighted to ensure it is proportionally representative of age and gender in line with figures published by the Office of National Statistics².

The table below shows the sample sizes for all the ABRSM Making Music reports. In the sampling approach used for the research published in 1994, 1997 and 2000, children were defined as under the age of 15. This was changed to children under the age of 18 in 2014, and the same definition has been used in 2020.

Date report published	Children (5 to 14)	Children (5 to 17)	Adults (15 and over)	Adults (18 and over)	Teachers
1994	861		1915		1867
1997	784		2027		1715
2000	927		1953		1507
2014		1726		1255	4491
2020		1503		1505	2485

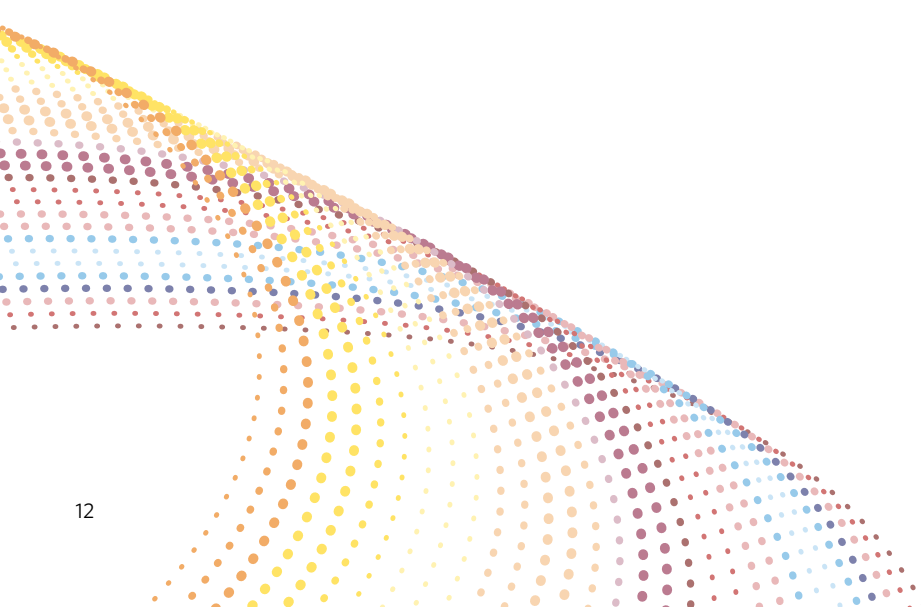
The teacher survey was shared with music teachers through ABRSM's own marketing and social media channels as well as by colleagues at Trinity College London, the Music Teachers Association, Music Mark, and Youth Music.

The surveys were completed between 24 February and 24 April 2020. During this time, the UK went into lockdown due to the coronavirus pandemic. All respondents were asked to answer questions based on their experience before the lockdown. Data from a separate survey on music teaching through the lockdown, conducted in June 2020, has also been included in this report.

Limitations of the sample

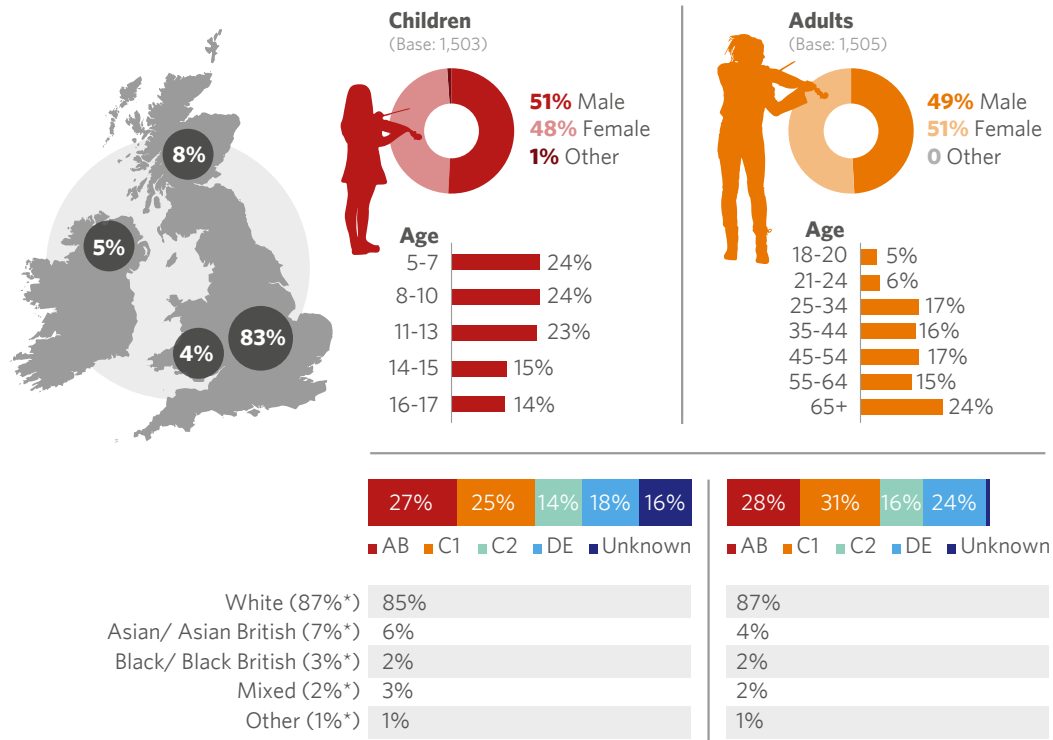
The size of the sample used for the learner survey is large enough to provide a strong indication of trends in music making across the whole population. However, given the sample sizes, the data cannot provide meaningful insight into the impact of minority characteristics, such as music making among people of minority ethnic backgrounds.

It should also be noted that the data in this report includes a binary definition of gender. Participants who do not identify as either male or female were asked to confirm this, however the number of respondents who identify themselves in another way was extremely small. It is for this reason only that gender information is presented as binary.



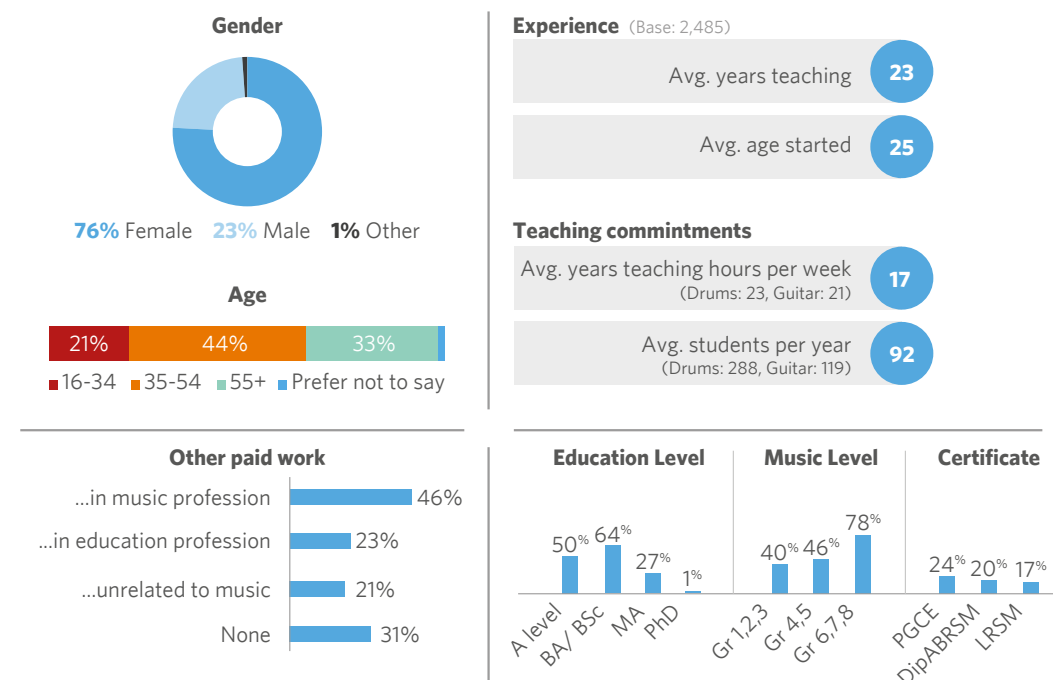
Respondent Profile

Figure 1: Learner profile



Base: all child and adults. *UK population statistics from 2011 census

Figure 2: Teacher profile



Base: all teachers

More than a Quarter of a Century of Making Music: How Music Education Has Changed

Music education has undergone significant change in the last quarter of a century or so. From learners' musical preferences, levels of participation and where music is played, to how and where teachers teach, the rich data from our series of ABRSM Making Music reports provides a window on these shifts, making it possible to identify trends. Some of these trends are evident more widely across the education sector but, perhaps uniquely for music education in the UK, seen collectively Making Music offers us insights that may point to the way music making, teaching, and learning may evolve in years to come.

ABRSM's first ABRSM Making Music survey was published in 1994 and represented a vastly different picture of how music is learned and taught in the UK. Since then, subsequent reports in 1997, 2000, 2014 and 2021 have seen a transformation in access to music making, for example, and more recently in whole class teaching, online learning, and changes in instrument preferences. More broadly, the rise in new technologies have had a dramatic impact in access to music from every corner of the globe which, in turn, has fed the appetites of music learners and creating new imperatives, and a broader palette from which classroom and one-to-one teaching draws. More widely across education in general, learner-centred approaches are the norm, with learners increasingly making informed choices, demanding different content, often seeking guidance and expert support from their teachers, and directing their own learning at home and online.

Music education provision has expanded significantly since 1994

Amongst the most important findings the ABRSM Making Music surveys have documented over the last 27 years has been the dramatic expansion in access to music education. Driven primarily through the school system, in the mid-nineties less than half (45%) of all children were playing a musical instrument. By 2014, due to sustained investment by successive governments, nearly eight out of ten (76%) of all children said they could play a musical instrument. A significant increase in provision from the late nineties and into the 2000s did much to level up the provision of music education, bringing an experience of playing and participating in music making at school to every child in the country.

The expansion in access to and focus on the importance of music education was given a significant boost in 2012, when the then government published the first National Plan for Music Education (NPME) accompanied by new investment to ensure that "Children from all backgrounds and every part of England should have the opportunity to learn a musical instrument; to make music with others; to learn to sing; and to have the opportunity to progress to the next level of excellence if they wish to." Across the UK, the importance of music making has often been prominent on political and policy agendas. In Wales, a series of reports have proposed similar approaches and in June this year the Welsh Government has committed to establish a National Music Service following a manifesto pledge to create a level playing field for music education, whilst a similar model of consolidation is being applied in Northern Ireland. In Scotland, concerted advocacy has generated huge political support and goodwill for music making and an understanding of musical progression, with recent announcements from all parties committing to music making and support for every school child to make progress in music. In July 2021, the Scottish Government announced the removal of fees for children learning a musical instrument at school.

Group teaching, including through whole class ensembles has contributed to the expansion in music making

Amongst the key developments heralded by the NPME were a commitment to National Curriculum music in all maintained schools for all five- to fourteen-year-olds, the creation of Music Education Hubs to take forward the work of music services to improve the consistency and quality of provision and, whole-class ensemble teaching programmes for ideally a year, and for a minimum of a term. The whole class ensemble teaching model tends to involve a visiting teacher from a Music Education Hub coming into a school and teaching a whole class of students, each with their own instrument. The idea is to give as many children as possible a free introduction to a musical instrument at school through fun, practical lessons that build children's musical skills.

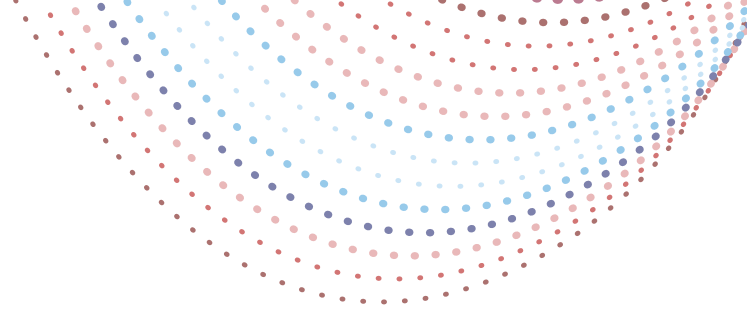
The revolution in music making at school is evidenced by the fact that, in 1994, just 16% of school pupils were involved in group music making. At that time, the pupil-apprentice or "chalk and talk" method was just as widely used, with 17% of students taking one-to-one lessons, and a similar proportion taking classroom music, often with limited use of instruments. Today two in three (66%) children 5 to 17 are involved in group music making at school, down from a high of 77% in 2014, and 84% of all children are participating in music making in some form.

The cost of music education is still limiting the diversity of those accessing it

However, despite much greater access to music education, the ability to pay for private tuition, as well as the cost of instruments, was still a determining factor in the extent to which children were able to develop their musical abilities and make progress. It seems that, despite much greater initial access to learning music for children, it was not translating into significant numbers of children progressing, at least through formal routes. Even in 2014, considered a high point, 74% of children from AB backgrounds had instrumental lessons compared with only 55% of children from social grades C1 and DE. As our 2021 survey shows, this trend has continued as today children and adults from the wealthiest households are 1.4 times more likely to play a musical instrument than those from the poorest households. That said, throughout the span of our ABRSM Making Music surveys, overall participation in music making continued to rise across all social grades until 2014.

The choice in instruments for music education has changed significantly since 1994

Another important area in which change has been seen is in the instrument choices available to learners and offered by teachers over the survey period. For those who grew up in the 1990s, school music memories are likely to be dominated by the recorder. In the 1997 survey, over half (52%) of all children played the recorder. Today that figure is 15%, even seeing a sharp fall from 28% in 2014. The reasons for this are generally to do with a broader range of methods being used to teach music, especially in whole class groups. Now, children are likely to play ukulele in class, for example, and preferences have steadily grown for instruments that allow young people to follow their musical interests and emulate their role models, such as drums and electric guitar.



However, whilst for one-to-one lessons, the keyboard and piano remain preferred instruments, music teachers are far less likely to exclusively teach using the piano. In 1994, 70% of teachers used the piano as the instrument of instruction. By 1997, there was already a big decline in teachers only teaching piano (down from 70% to 54%), instead offering other instruments such as flute and saxophone. Whilst the piano remains dominant among teachers, today in 2021, there is a much greater spread of tuition available in instruments including flute, violin, clarinet, and saxophone. Music theory (60%) and singing (28%) are also widely taught by music teachers. However, the top five instruments for learners include piano, keyboard, guitar, and drum kit, and only the first two of these appear on the list of top ten instruments taught by teachers.

Music is increasingly made through digital means.

Beyond instruments, in recent years we have seen young people much more likely to use computers, phones and laptops to make music. This trend has taken off since 2014. It was not even included in the 2000 survey, whereas both in 2014 and today just over a quarter (26%) of children and 13% of adults (14% in 2014) report making music through digital means. Clearly, the pandemic is likely to have accelerated this trend and what can be stated with confidence is that digital music making will form an ever-increasing part of the ecology of music education in the future. We explore what the future for digital music learning and teaching might look like at the end of this report.

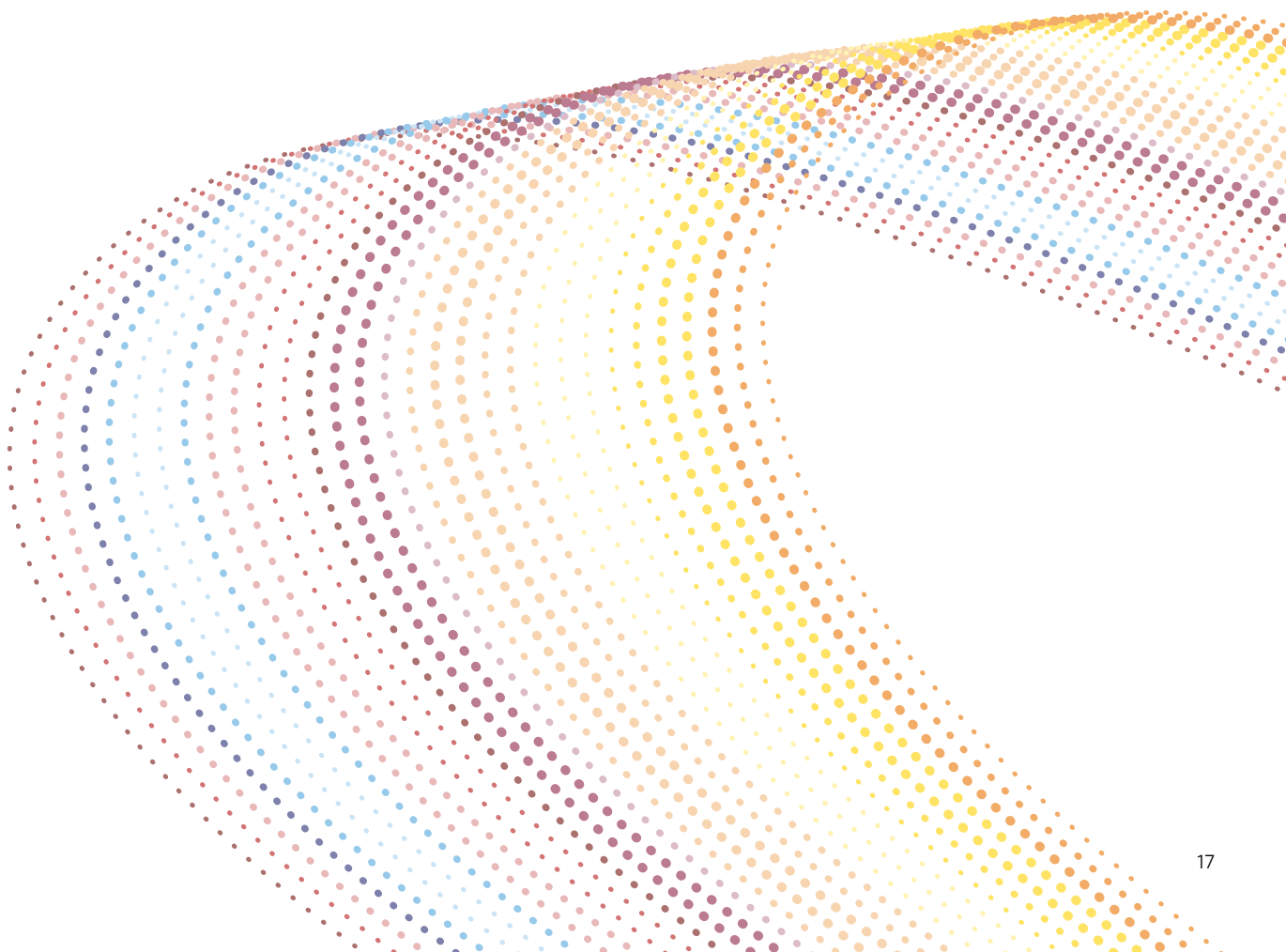
Learners are more likely to direct their own learning in line with their tastes

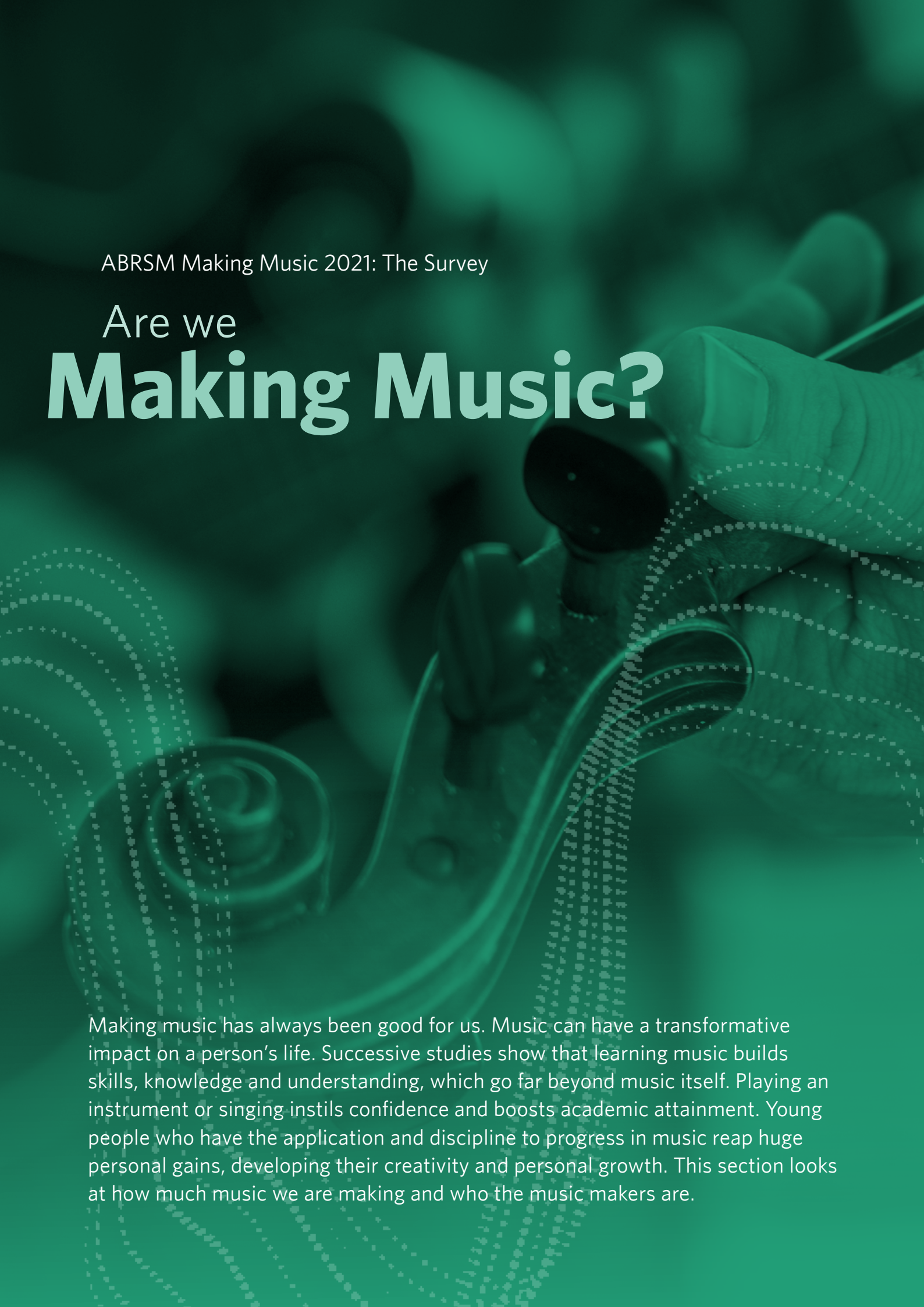
It is certainly the case that, over time, music learners have taken greater control of their learning and are exploring a range of opportunities to follow different routes through music making. In 2014, our ABRSM Making Music survey noted that formal learning was just one avenue learners have through which to develop their musical curiosity. In 2014, 40% of young people were making music outside of school with friends. More than two thirds of children said it was they who made the decision to play an instrument and role models were an important factor with almost a quarter (24%) of child participants opting to play an instrument after seeing someone else play one.

What we have also seen is huge change in the genres or types of the music being learned. Driven by the demands of music learners, and an ever-increasing requirement to meet music learners where they are by teaching music that excites and enthuses them, we are far more likely to see Mozart alongside Stormzy in today's music classes. The launch in March this year of the new Model Music Curriculum for England attests to the shift in breadth, demand, and meeting learners' interests, now offering school pupils the chance to learn a much more diverse range of music from historically important composers and contemporary and popular musicians. This trend, as we have seen, is also influencing the instruments learners choose to play, and those that are offered by teachers. The desire to play to emulate role models was already evident in 2000, with 12% citing this as the reason they began to learn music. Today the choice of learners to play contemporary styles of music is high, to the extent that applying any labels to musical genres may soon become impossible due to the kaleidoscopic nature of the way in which music from every corner of the globe and period is fusing and interacting.

Sustaining gains

Data from the past 27 years has shown that first access programmes have worked in providing high proportions of children with an experience of music making. This demonstrates the value and importance of having an appropriately funded national plan. Music education has, and must continue to, evolve to reflect the tastes and preferences of learners. This includes allowing learners greater say in the music they learn and using technology to support their learning both formally and informally. However, cost remains a key barrier to many learners following formal progression routes. As evidence later in this report shows, more needs to be done to ensure first access programmes, like whole class ensemble teaching, become more successful in inspiring children and young people to continue their music education after the programme has ended. We also need to bridge the gaps between informal music making and formal learning, by centring music education firmly around the learner.



A hand playing a violin, with a green overlay and abstract patterns. The background is a close-up of a hand holding a violin, with a green overlay and abstract patterns. The text is overlaid on the image.

ABRSM Making Music 2021: The Survey

Are we **Making Music?**

Making music has always been good for us. Music can have a transformative impact on a person's life. Successive studies show that learning music builds skills, knowledge and understanding, which go far beyond music itself. Playing an instrument or singing instils confidence and boosts academic attainment. Young people who have the application and discipline to progress in music reap huge personal gains, developing their creativity and personal growth. This section looks at how much music we are making and who the music makers are.

Making music is an extremely popular activity among both children and adults.

A significant majority of children and more than half of all adults are making music. The survey data show that 86% of children and 43% of adults report that they are actively making music in some way³. It was also found that 59% of children and 27% of adults currently play a musical instrument. Data collected on playing an instrument includes learners at various stages in their learning journey, from complete beginners learning in an informal setting, to those preparing for high level music qualifications.

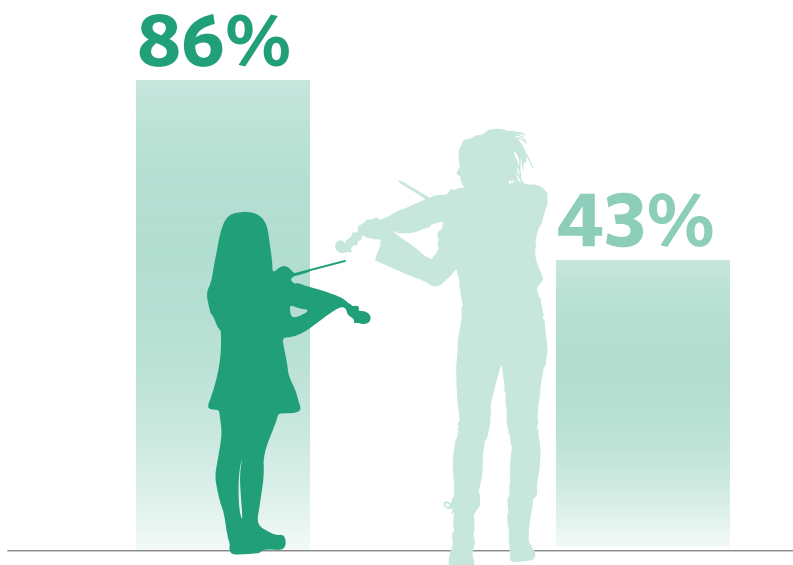
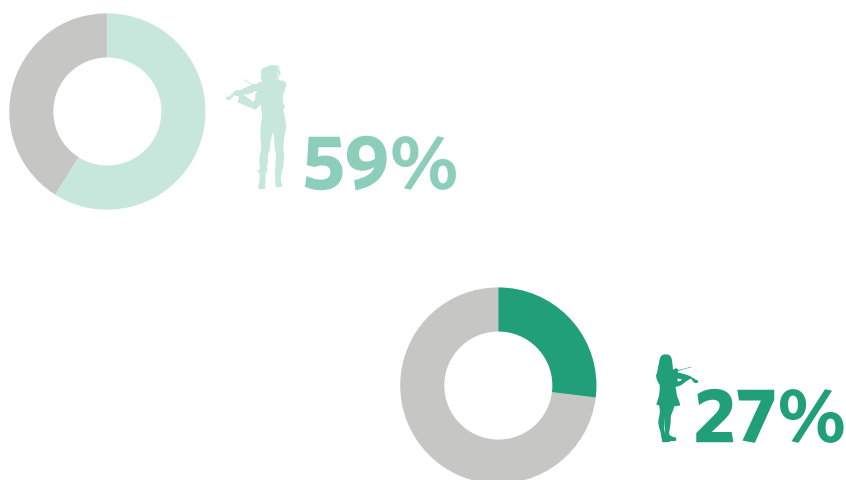
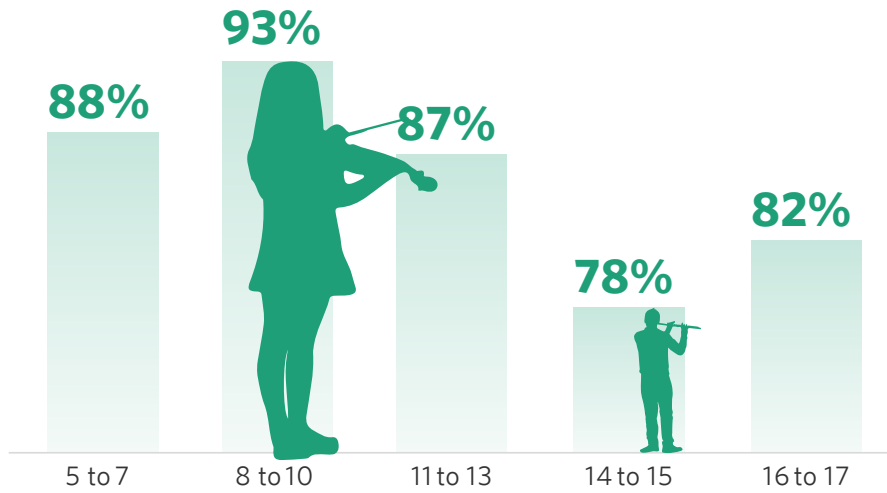
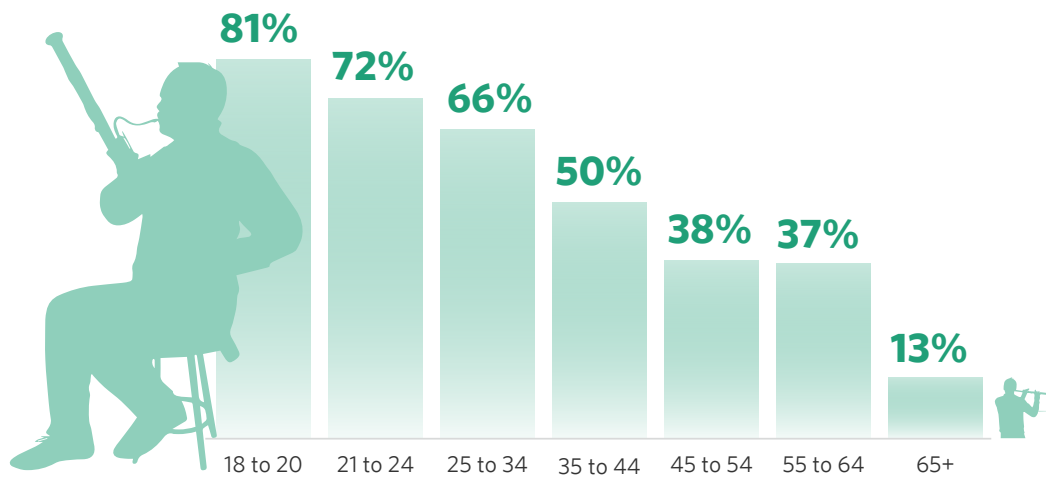
Figure 3: Adults and children making music**Figure 4: Adults and children who play instrumental music**

Figure 5: Proportion of children who are musically active



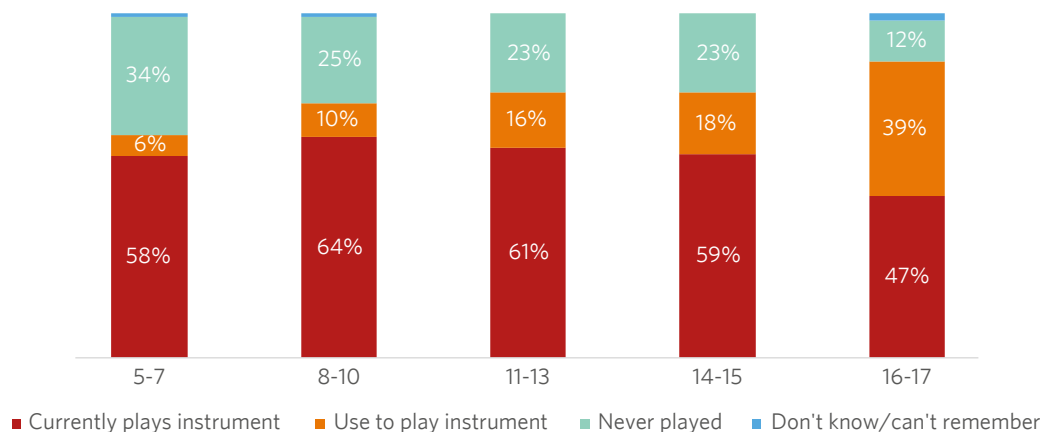
Base: all child respondents (1,503)

Figure 6: Proportion of adults who are musically active



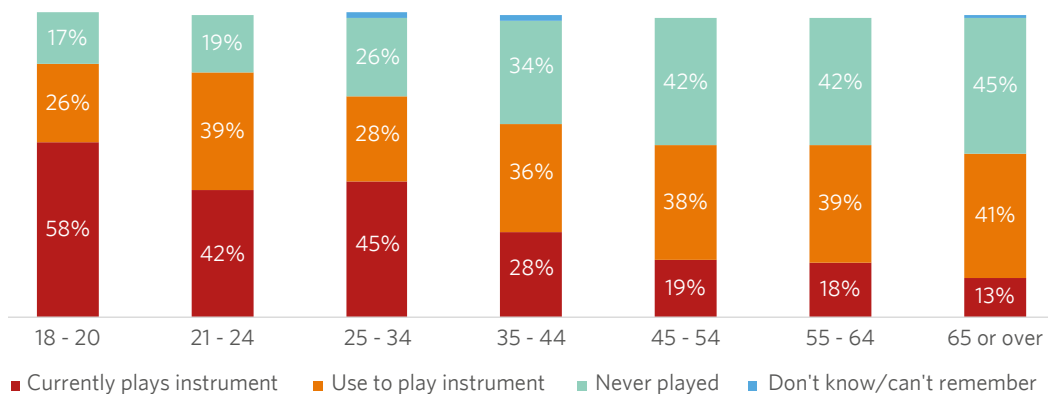
Base: all adult respondents (1,505)

Figure 7: Proportion of children (5 to 17) who currently play, used to play or have never played an instrument



Base: all child respondents (1,503)

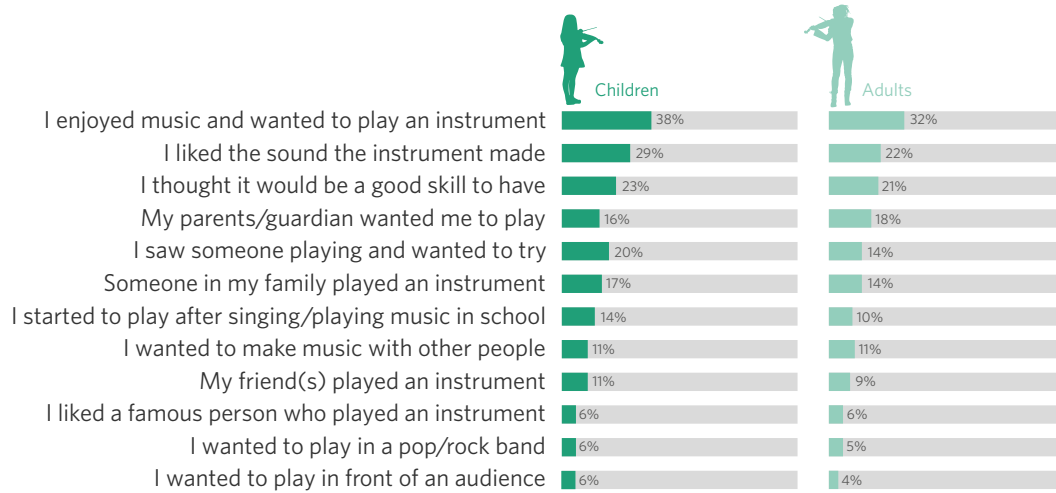
Figure 8: Proportion of adults (18+) who currently play, used to play or have never played an instrument



Base: all adult respondents (1,505)

We make music because it makes us feel happy and connected. More than anything, children and adults are motivated to play an instrument for the enjoyment and love of music. Role models also clearly have a significant influence over a child’s desire to play music, with a fifth of children also reporting that seeing someone else play is also a reason for starting to play an instrument. Adults appear to be slightly more motivated by the influence of their parents than children.

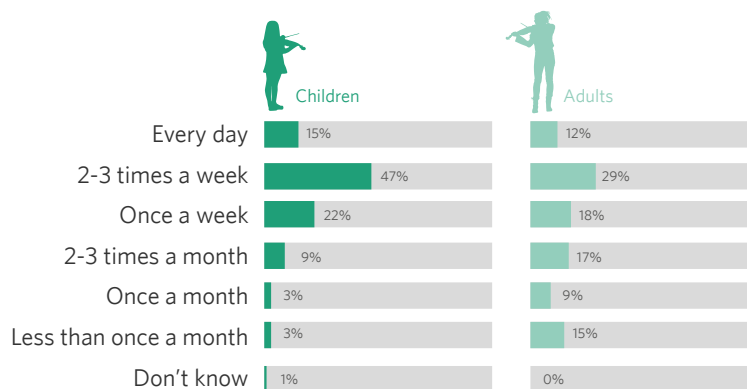
Figure 9: Reasons for starting to play



Base: All who can play a musical instrument

Most of those who do play an instrument, play regularly. Those who can play an instrument are regularly doing so, with 84% of children and 59% of adults playing their instrument at least once a week. For many children, this figure is likely to include a scheduled lesson privately or at school, usually once a week. For many more, it may just as equally involve getting together regularly with friends or online to have fun playing an instrument. It is striking to note that one in eight children play their musical instrument every day.

Figure 10: How often music makers play

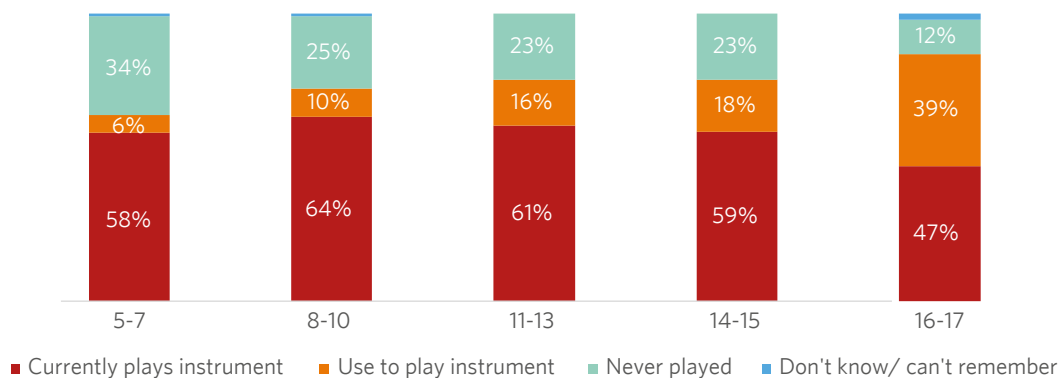


Base: All who can play a musical instrument

Children are learning music at an earlier age than before. The age that learners are when they are learning to play music may have an influence on how much impact lessons have on them in the long run. Children appear to be starting and ending their musical learning at a much younger age than adults did when they were children. Two thirds of children began learning between the age of 5 and 10. By contrast, adults began learning to play an instrument at 12 years old. Children who stop playing an instrument do so on average by the time they are 11, whilst adults report on average that they stopped playing at the age of 18.

There is a decline in playing instruments as children get older. Only 47% of 16- to 17-year-olds are currently playing an instrument, compared to 64% of 8- to 10-year-olds. Of children who report that they have stopped playing a musical instrument, 68% did so by the age of 14. These findings are consistent with data from 2014⁴. This data suggests that learning happening at a young age is not translating to a long-term commitment to making music for a significant proportion of learners.

Figure 11: Children playing musical instruments by age range



Base: all children who responded to the survey: 5 to 7 (), 8 to 10 (), 11 to 13 (), 14 to 15 (), 16 to 17 ()

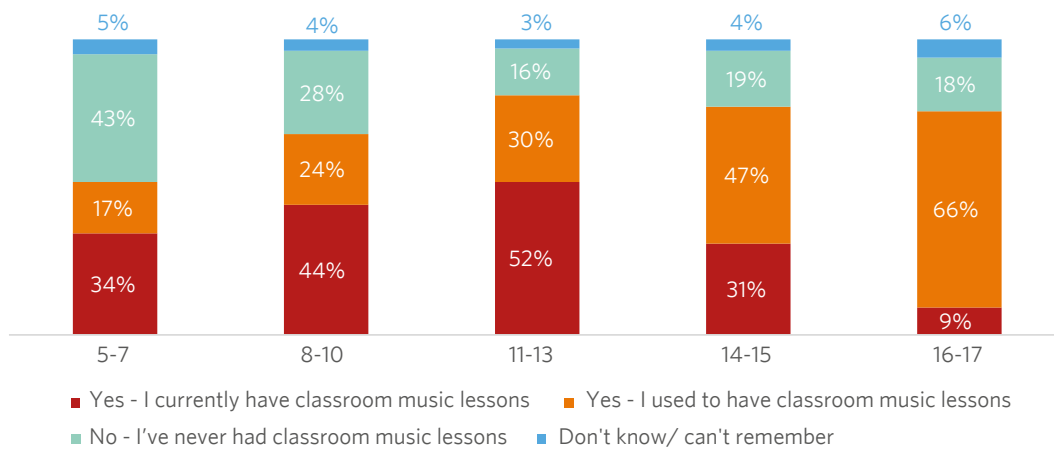
The primary source of music education for the majority learners is at school. Most learners who have instrumental lessons continue to have them at school. The data also shows that 70% of children have had classroom music lessons at school. When asked about their experience of classroom music lessons, nearly all children report that they enjoy them (94%) and agree that these lessons help to improve their general musical skills (93%). Most children (70%) who are currently having classroom music lessons are between the ages of 8 and 13.

There is a fall in children taking classroom music lessons after the age of 13

The survey data show that by the age of 11, over half of all children are participating in classroom music lessons at school. However, by the age of 14, the proportion drops to around one in three children and at 16 just one in ten children are involved in classroom music lessons. This is consistent with the fact that children aged 11, 12 and 13 (in years 7, 8 and 9) all get continuing and compulsory music lessons.

Clearly, the need to choose subjects to study at GCSE level can explain this drop to some extent, but it is likely that the availability of school resources for music and young people choosing informal routes to pursue their musical interests may also play a role. The comparison between young people playing classroom music and those playing musical instruments is most pronounced at the age of 14 and above. Given the enormous popularity of music making as a pastime, this finding suggests that learning of music at secondary school, beyond the age of 13, needs to be seen as a more appealing choice, especially to those children who might want to continue.

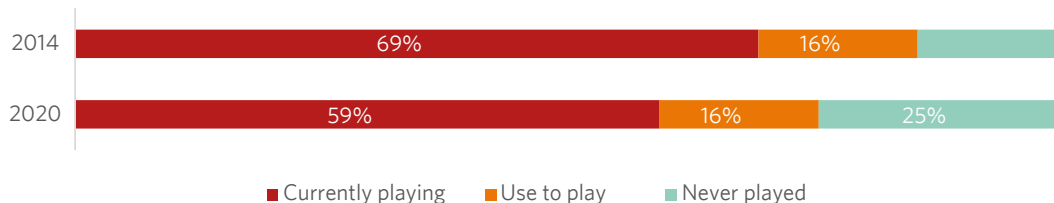
Figure 12: Children who have had classroom music lessons in school by age



Base: all children who have responded to the survey (1,503)

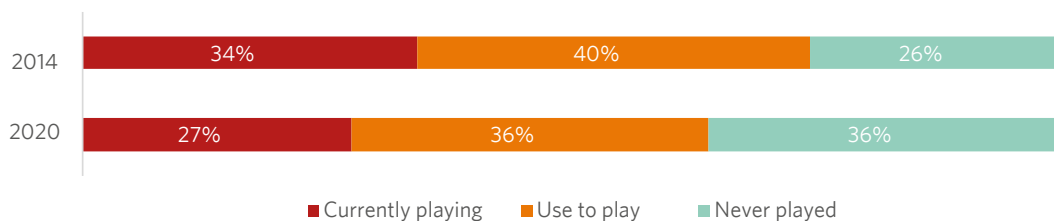
There has been a decline in children and adults playing musical instruments. Despite the current high levels of those who have ever played an instrument, the data shows a decline between 2014 and 2020. Compared to 2014⁵, the proportion of children and adults currently playing a musical instrument has fallen by 15% and 20% respectively. This data may point to a progression “problem”. That is to say that whilst more children “have a go” at playing an instrument early in their school career, there are still challenges in supporting young people to stick with their instrument and progress their music learning. It also suggests a reduction in music making at school in the years beyond which classroom lessons are compulsory.

Figure 13: Children playing musical instruments in 2014 and 2020



Base: all child respondents (2014: 1,725, 2020: 1,503)

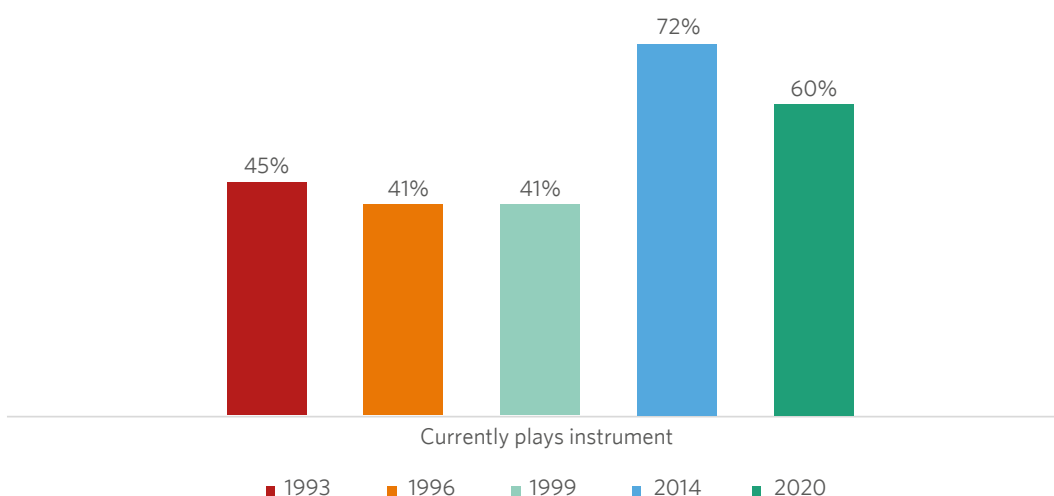
Figure 14: Adults playing musical instruments in 2014 and 2020



Base: all adult respondents (2014: 1,255, 2020: 1,505)

Data from all five surveys can be used to track the proportion of children aged between 5 and 14 playing an instrument at the time of the survey. The chart below shows that while the proportion of children currently playing an instrument in 2020 was significantly higher than at the turn of the century, there has been a decline since 2014.

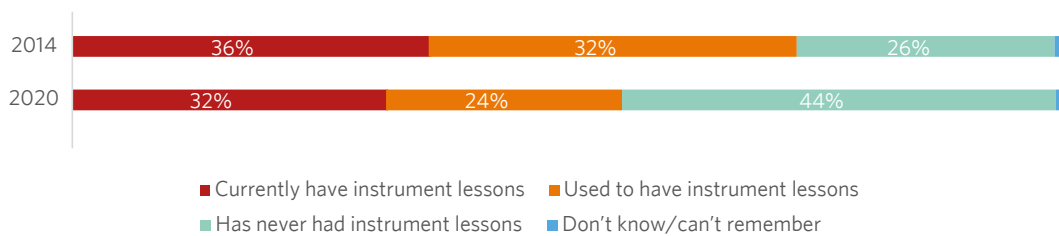
Figure 15: Children (age 5 to 14) currently playing a musical instrument



Base: all child respondents aged 5 to 14 in 1993, 1996, 1999, 2014 and 2020

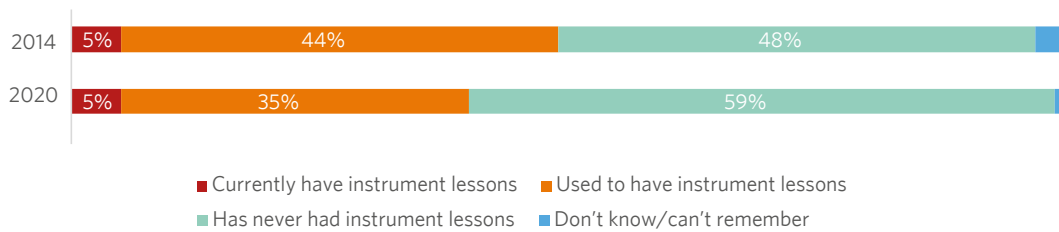
There has been a decline in children taking instrumental lessons. The proportion of children aged 5 to 17 who are currently having instrumental music lessons fell from 36% in 2014 to 32% in 2020, a fall of around 11%, whilst the proportion of adults taking lessons has also fallen. Participation in singing lessons for children and adults also remained the same between 2014 and 2020. It may be the case that many children do not consider whole class ensemble lessons to be instrumental lessons, and others may be learning in a more informal, self-directed way. However, this data does indicate that fewer learners than at any point during the ABRSM Making Music surveys are receiving formalised instrumental tuition.

Figure 16: Instrumental music lessons for children



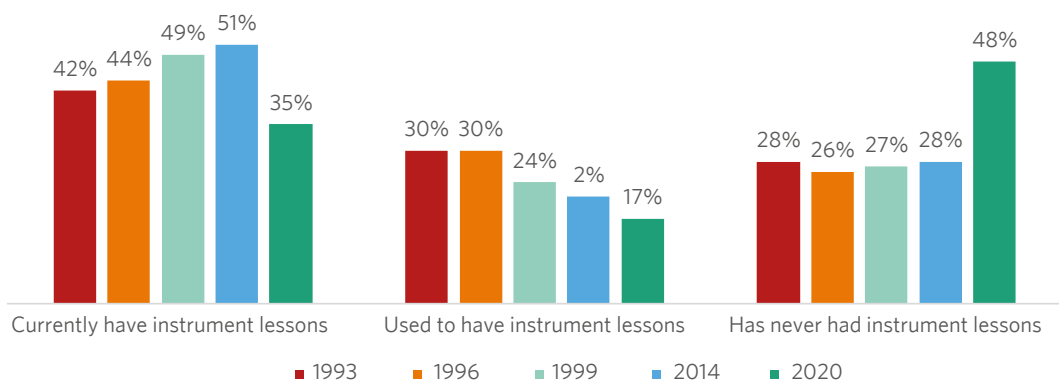
Base: all child respondents (2014: 1725, 2020: 1503)

Figure 17: Instrumental music lessons for adults



Base: all adult respondents (2014: 1255, 2020: 1505)

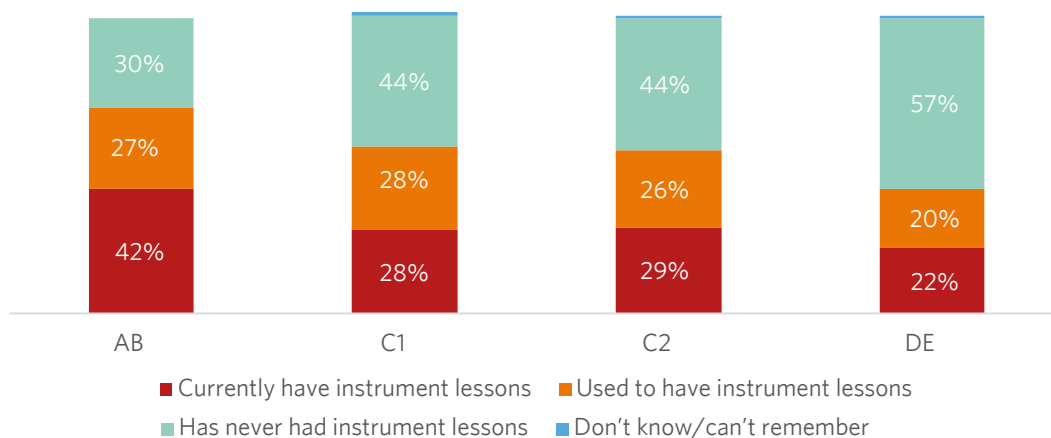
Figure 18: Proportion of children 5 to 14 having instrumental lessons between 1993 and 2020



Base: all child respondents aged 5 to 14 in 1993, 1996, 1999, 2014 and 2020

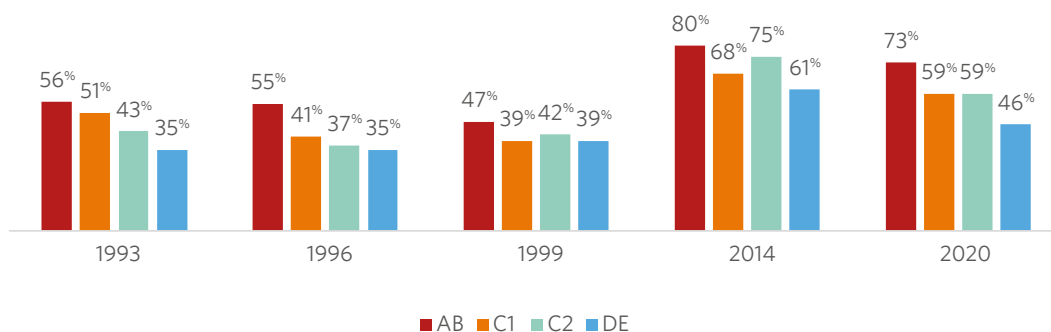
People from wealthier households are more likely to play a musical instrument. Findings show that children and adults from the wealthiest households are 1.4 times more likely to play a musical instrument than those from the poorest households. This has increased from 1.1 for children and 1.3 for adults in 2014. The data shows that children from the wealthiest households are 1.6 times more likely to have music lessons than those from the poorest households, compared to 1.4 in 2014. Given the cost of buying an instrument and of instrumental tuition it is, perhaps, not surprising that these gaps exist. It is also worth bearing in mind that these barriers may also involve access to lessons, the cost of getting to rehearsals, and access to the internet and technology. In many cases, local music services are making great efforts to overcome these obstacles for learners and there are many instances of good practice in ensuring all people have access to music tuition, despite their economic circumstances. However, the disparity shown in the data indicates that more should be done to focus resources for music education where they are most needed.

Figure 19: Children playing musical instrument by social grade



Base: all child respondents (1,503)

Figure 20: Children (5 to 14) who currently play an instrument by social grade

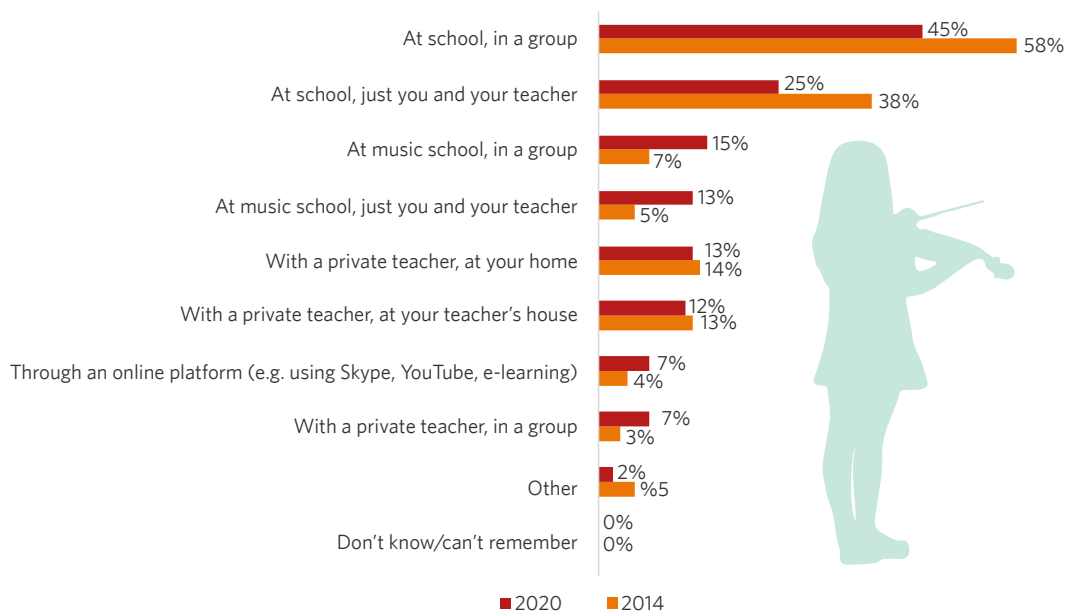


Base: all child respondents aged 5 to 14 who currently play an instrument in 1993, 1996, 1999, 2000, 2014 and 2020

Lockdown exposed inequalities between wealthy and less wealthy households. Three quarters of children from the wealthiest households used digital technology to support their learning during lockdown compared to just 54% of those from the poorest families, according to the Institute for Fiscal Studies (IFS). The same study by the IFS shows that one in ten primary school children in England had no access to a smartphone or any other internet enabled device⁶ during lockdown and children from wealthier households were significantly more likely to be given access to a device by their parents than those from the poorest families.

Falls in school music lessons are only part of the picture. The biggest decline in children taking instrumental music lessons has been at school. Whilst we know that school whole class ensemble lessons are compulsory until the age of 11, and music lessons must be taught at school until 13, there is clearly a significant reduction in school music lessons. It seems likely that the ensemble model is simply not translating into children’s continued interest in taking music lessons. However, the data shows another big shift taking place and this is in those children taking lessons elsewhere, neither in school nor with a private teacher. The proportion of children having lessons at a music school/service has increased by more than 50%, with increases also in online lessons. The data indicates that children are becoming less reliant on schools to provide their music education and are seeking this elsewhere.

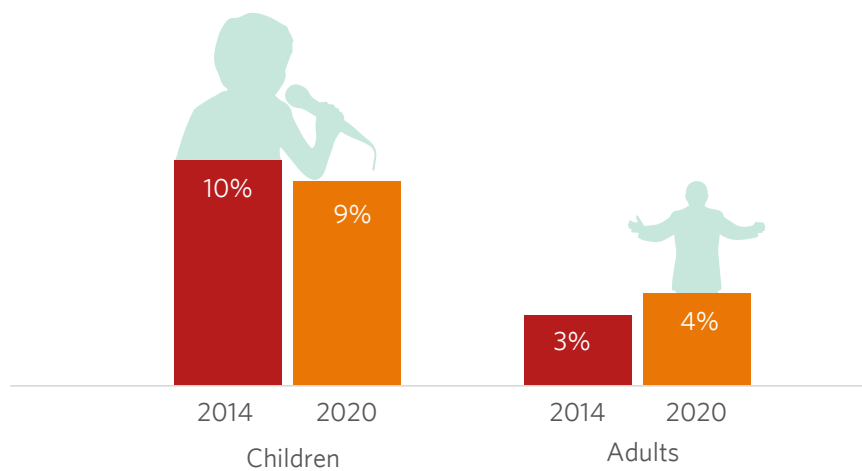
Figure 21: Where children (5 to 17) have music lessons in 2014 and 2020



Base: all child respondents who have lessons (831)

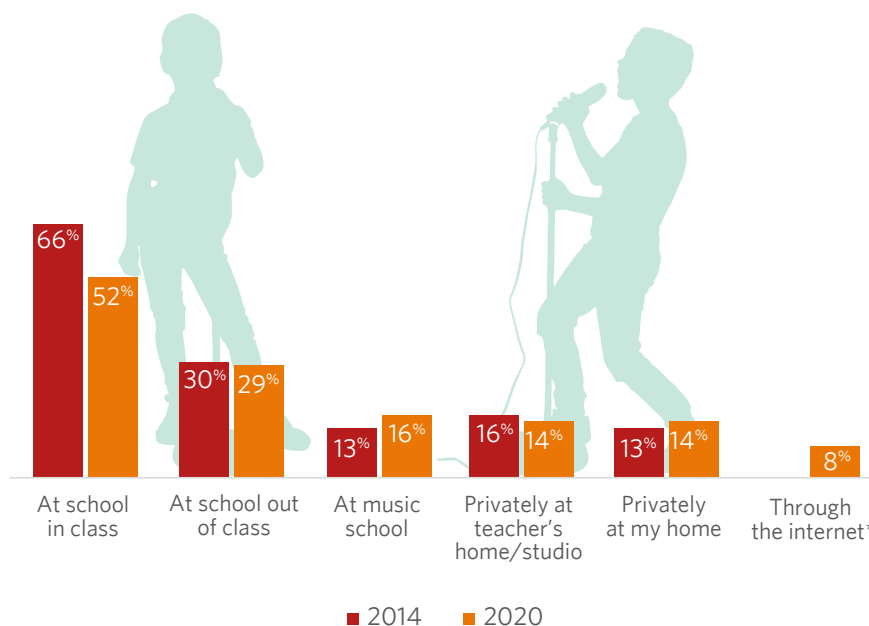
The numbers of us singing have not changed, but we are doing more of it online. Around one in ten children are currently taking singing lessons, either at school or privately and data for both adults and children has remained broadly the same since 2014. The big shift, however, has been in where we sing. Less singing is happening at school and much more is taking place online. In 2020, 8% or just over 1 in 12 of us are now learning to sing through online lessons, whereas there was no significant statistic for online singing in 2014.

Figure 22: Taking singing lessons (2014 - 2020)



Base: all children and adults

Figure 23: Children taking singing lessons (2014 - 2020)



*Exact figure for 2014 is unknown, but cannot be higher than 1% (other)

Base: all children and adults

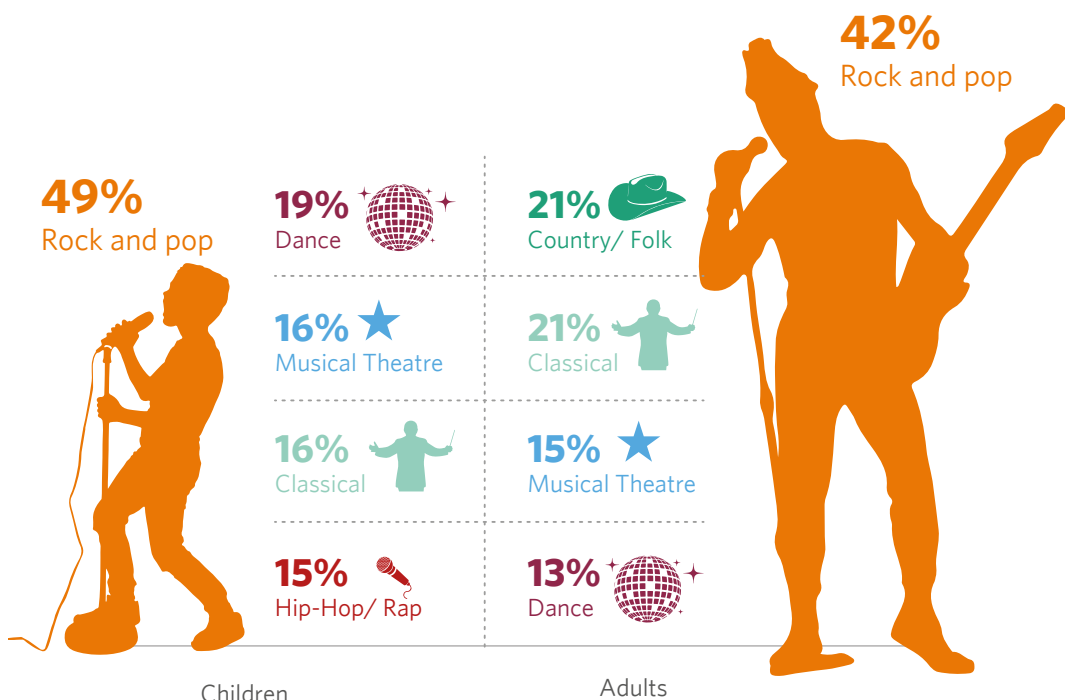
A close-up photograph of a hand playing a piano, with the keys and the hand's fingers in focus. The image is overlaid with a digital graphic of sound waves, represented by a series of white dots forming a wave pattern. The overall color scheme is a warm, golden-brown hue.

How are we **Making Music?**

How we make music is constantly changing, whether it is the style and genre of music, the instruments we play or the way we use technology. Ensuring that music educators respond and adapt to the ways in which making music is evolving is essential to its continued success. This section looks at the data behind how music learners are playing music in 2020.

Musical tastes are changing. The music that both children and adults play is now largely dominated by contemporary styles, including rock and pop and musical theatre. Classical music remains in the top five preferred styles but has become less popular since 2014. For children the figure for those who like to play classical music was 16% in 2020, whereas it was 22% in 2014). Our question about preferred musical styles clearly indicates that tastes are shifting, and not just from traditional to contemporary genres of music. Whilst both children and adults show greater inclination to learn and play contemporary music, this is often one or many choices that learners make; sometimes choosing classical music and at other times playing a fusion of styles and genres. In 2020, the survey included Hip Hop/Rap, RnB, Dance, Country/Folk and Alternative as musical style choices for the first time.

Figure 24: Top five music styles children and adults like to play



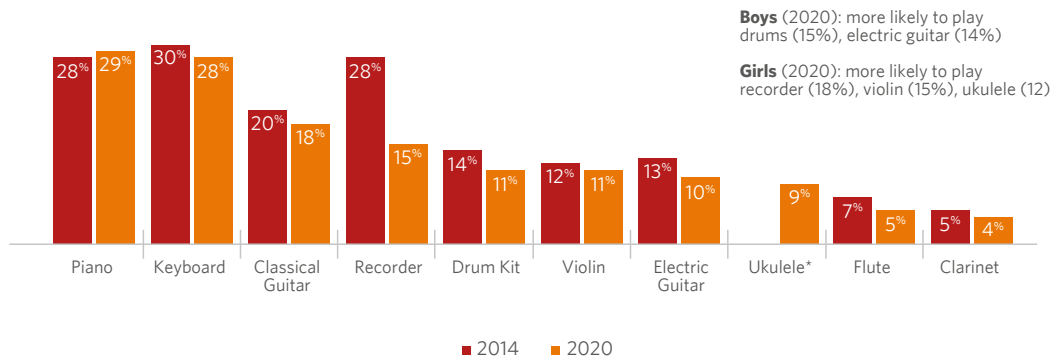
Base: All child and adult respondents who currently play, take singing lessons, sing/play in a group or do other music making children. (1,283), adults (759)

The four instruments most played by children have remained consistent since 2014. Also consistent with 2014 are the preferences boys and girls have for the instruments they choose. Both boys and girls are equally likely to play an instrument in general, but boys are more likely than girls to choose to play the drum kit or electric guitar, while girls are more likely than boys to play the recorder, violin, and ukulele.

There has been a steep decline in the popularity of the recorder and an increase in the use of ukulele

The recorder appears to be falling out of favour with both children and adults, as there has been a 47% decrease in those playing the recorder between 2014 and 2020. The figure for children is most likely due to its declining use in schools, and whole class music lessons. By contrast, the proportion of children now playing the ukulele was 9% in 2020, while in 2014 there was no significant data. The rise in the use of ukulele in whole class ensemble teaching has seen its use grown from 1% in 2014 to 15% in 2020. The data appears to suggest that ukuleles are replacing the recorder as a popular instrument for whole class ensemble teaching.

Figure 25: Top five music styles children and adults like to play



Boys (2020): more likely to play drums (15%), electric guitar (14%)
Girls (2020): more likely to play recorder (18%), violin (15%), ukulele (12%)

*Exact figure for 2014 is unknown, but cannot be higher than 6% (other)

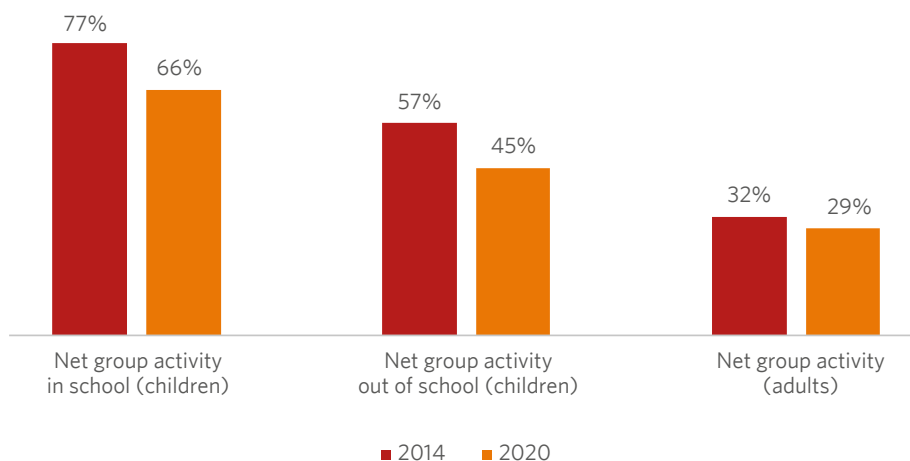
Base: All child and adult respondents who currently play, take singing lessons, sing/play in a group or do other music making children. (1,283), adults (759)

The instruments learners want to play are largely different to those used for whole class ensemble teaching. What stands out from the data is the difference between the instruments learners choose to play and those offered by teachers. This is principally caused by whole group teaching at school where, understandably, music services largely need children to be using the same instrument. This lack of choice or flexibility is widely acknowledged to have an impact on many children not engaging with instrumental music learning beyond whole class teaching. Whilst the top five instruments for learners include piano, keyboard, guitar, and drum kit, only the first two appear on the list of top ten instruments taught by teachers.

Despite a decline, there are high levels of group music making in schools. In 2020, 66% of children reported that they took part in some form of group music making including making music with their friends for fun. This figure was 77% in 2014. The data also shows that most children who participate in ensemble playing and singing are in Key Stage 2 (aged 8 to 11). The most recent annual Music Education Hubs⁷ survey available shows that while the number of ensembles aimed at children in 2017 increased by 15%, the participation rate declined by 6.1%. This disparity needs further investigation.

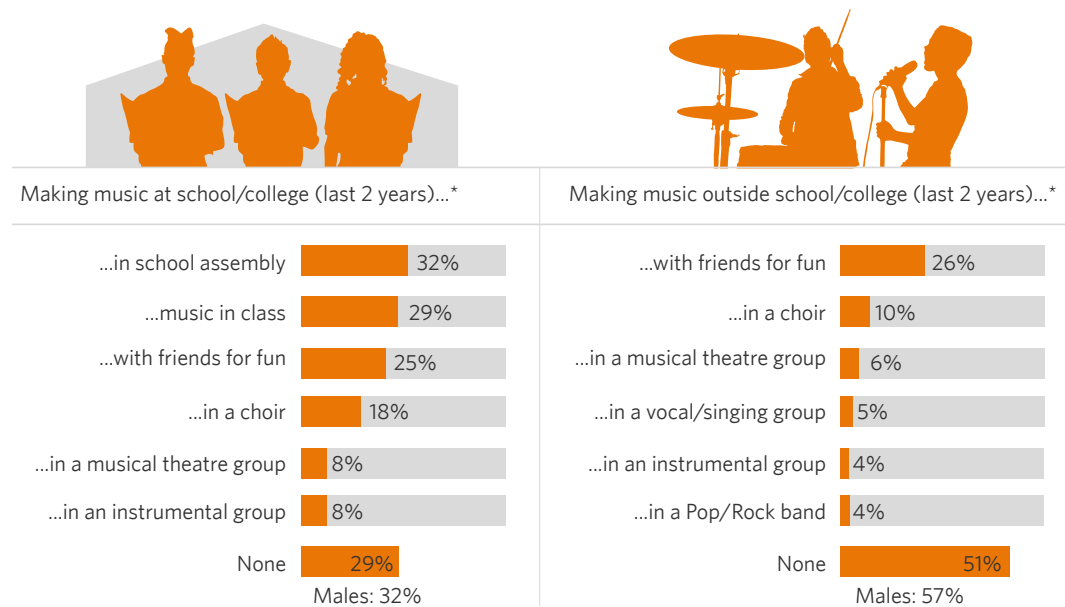
Group music making is changing. Overall, 45% of children report group music making outside school in 2020, down from 57% in 2014. One explanation for the decline is that, whilst traditional models of group music making may be falling, children may be getting together to make music in different ways, including online and in smaller numbers they might not classify as “group music making”. It is also worth noting that music services are also becoming more experimental and are innovating to provide a more varied offer that includes, but is not limited to, traditional group music making models. Both inside and outside school, one in four children say they get together with friends to make music for fun.

Figure 26: Group music making for children and adults in 2014 and 2020



Base: All children and adults who responded to the survey: children: 2014 (1,725), 2020 (1,503); adults: 2014 (1,255), 2020 (1,505)

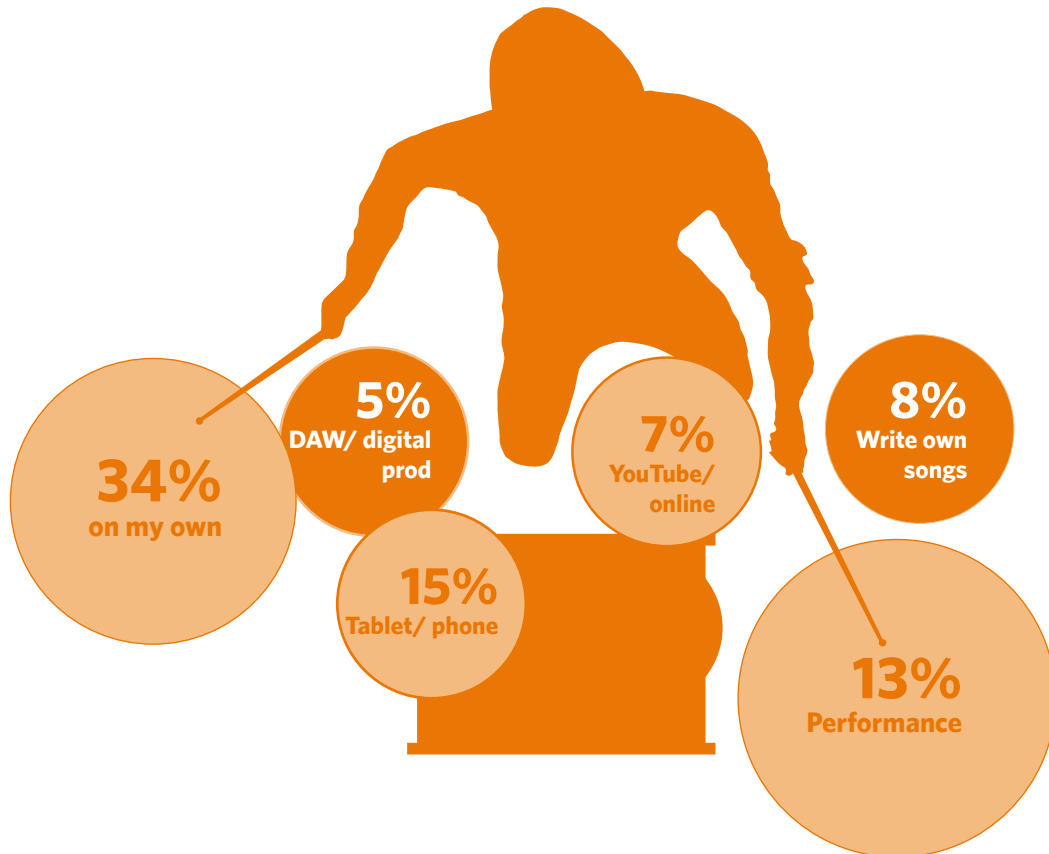
Figure 27: Type of group singing, or instrumental playing done at school/college or outside of school/college in the last two years



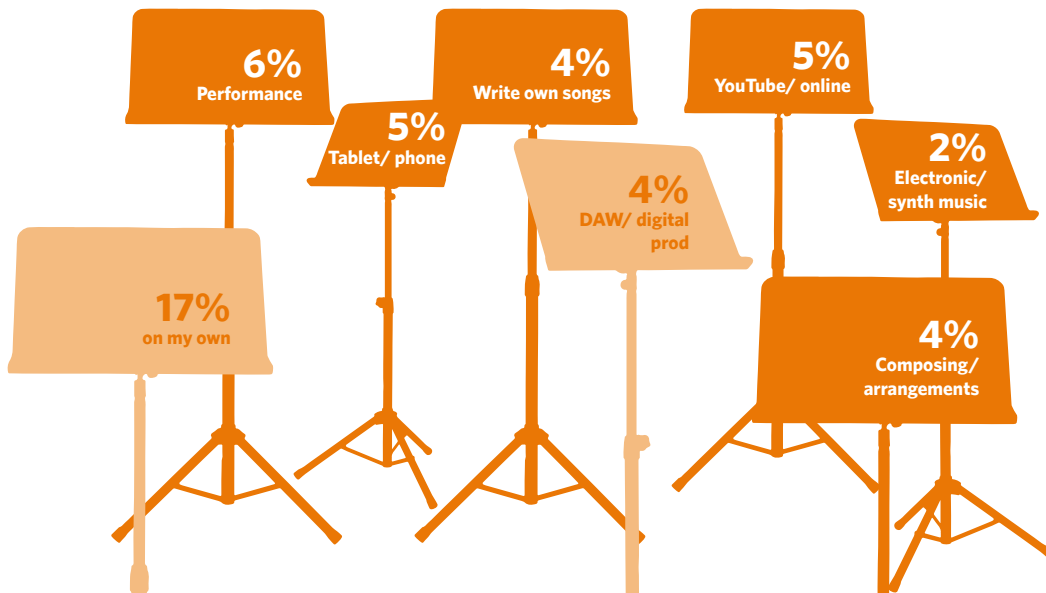
Base: All children

Children are making music in non-traditional ways. The data clearly shows that, even before the pandemic, many children are finding different ways to make music, often on their own and often online and using digital means. Whilst some further investigation is required to assess whether this shift directly accounts for falls in young people taking instrumental lessons, for example, the data suggests that whilst a significant proportion of young people make music in traditional formal ways, there is a growing trend to explore and follow other routes. It may well be the case that, far from being in decline, how young people are making music is simply changing. This shift is further borne out by comparing the data with the same data for adults who tend to do less online or on their own.

Figure 28: Other ways that children have made music over the last 2 years



Base: All children

Figure 29: Other ways that adults have made music over the last two years

Base: All adults

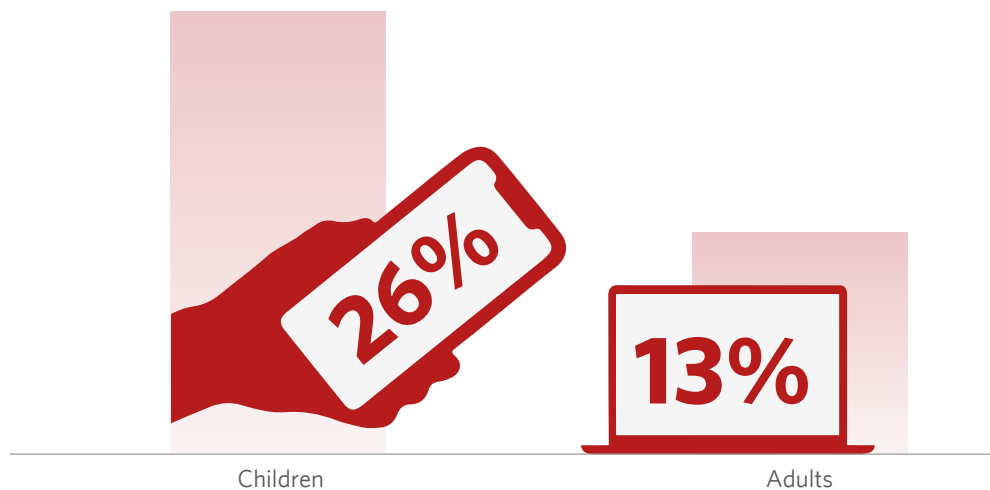
A hand is shown playing a piano, with the scene overlaid in a vibrant red color. The background features a series of white, dotted lines that form a wavy, digital pattern, resembling a sound wave or data stream. The overall aesthetic is modern and technological.

Digital **Music Making**

More and more of us have discovered the range and depth of opportunities that digital technology provides. This section looks at some of the trends in how we are playing, learning and teaching music today.

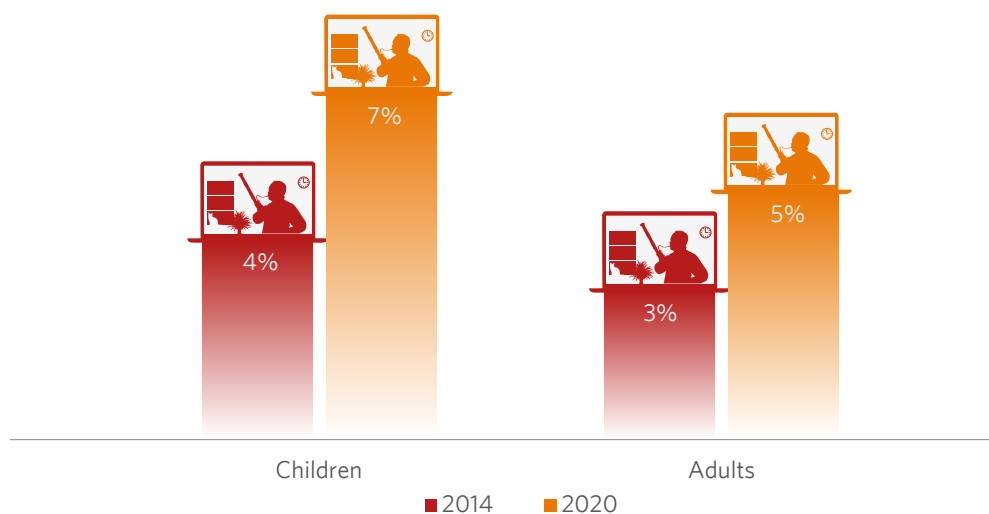
Digital music making was popular with young people before the pandemic. Young music makers clearly see the use of digital resources as an important part of their musical activity. Just over a quarter (26%) of children and 13% of adults report making music through digital means. Nearly two thirds of children (64%) who had played an instrument reported using some type of digital resource, such as YouTube videos, smartphone apps and recording, and online courses, to support their learning. Prior to the pandemic, the data showed a small increase in online music lessons for children from 4% in 2014 to 7% in 2020 and for adults from 3% in 2014 to 5% in 2020. It will be important to assess whether there is a return to anything like these figures, given the shift to online learning during the pandemic, in future surveys.

Figure 30: Making music through digital means



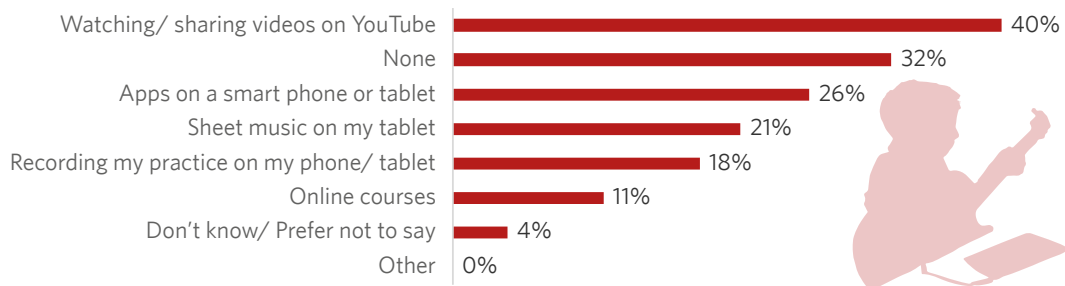
Just over a quarter (26%) of children and 13% of adults report making music through digital means.

Figure 31: Online music lessons prior to the pandemic



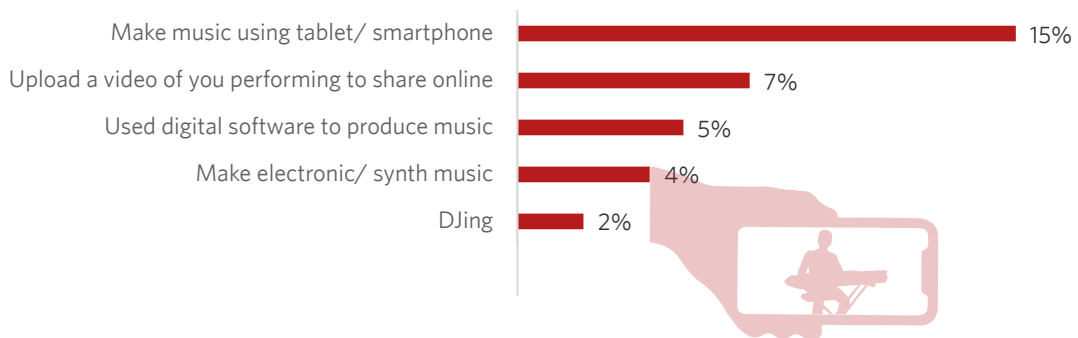
Prior to the pandemic, the data showed a small increase in online music lessons for children from 4% in 2014 to 7% in 2020 and for adults from 3% in 2014 to 5% in 2020.

Figure 32: Digital technology used by child learners



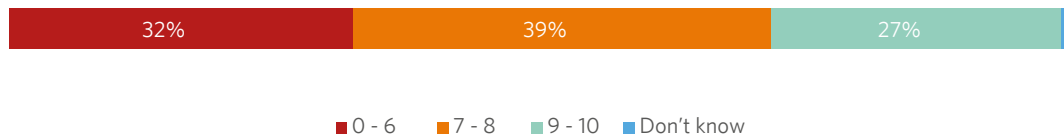
Base: All child respondents who have ever played an instrument (1,133)

Figure 33: Top five digital music activities for children

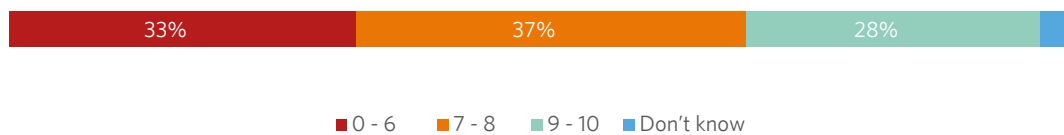


Base: All children who responded to the survey (1,503)

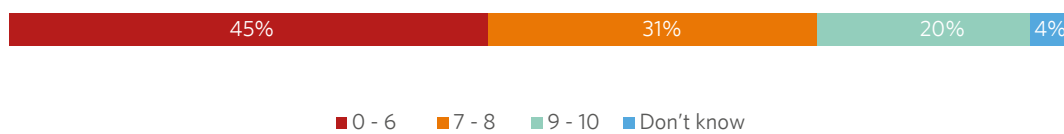
Digital technology plays an important role in support progression. In 2020, two thirds of children and adults rated the value of digital technology in supporting their progression as 7 or higher on a scale of 1 to 10, 10 being the most helpful. Teachers were less positive with 45% of respondents rating its effectiveness 6 or less. While 12% of music teachers report that technology makes it easier to share resources, nearly one fifth (19%) stated that technology helps them to better engage with their learners.

Figure 34: Children rating the effectiveness of technology in supporting progression

Base: All child respondents who report using technology as part of their learning (723)

Figure 35: Adults rating the effectiveness of technology in supporting progression

Base: All adult respondents who report using technology as part of their learning (339)

Figure 36: Teachers rating the effectiveness of technology in supporting progression

Base: All music teachers who responded to the survey (2,231)

Many children spent time learning music during lockdown. According to a study conducted by the Royal Philharmonic Orchestra, two thirds of parents (66%) with children who were learning to play a musical instrument said their child had done more music practice since lockdown started. The same study found that the journey of discovery started in lockdown would continue. One in six people (16%) said they intended to continue exploring the music they discovered during lockdown.

Teachers adapted to online lessons and learners made good progress. 87% of examiners and teachers were able to effectively adapt to online teaching⁸ within weeks of lockdown. Meanwhile, 39% of teachers said their students had made better progress than normal during the period of online learning⁹. Separate research by Music Education Partnership Group (MEPG),¹⁰ which represents music organisations in Scotland, found that most music teachers saw high levels of engagement, at an average of 7.5 out of 10, among their learners when delivering online lessons during the COVID-19 lockdown. Tutors report that students were generally more engaged, there were fewer distractions and most significantly, students were generally considered to be making better progress.

Digital technology and parental involvement helped inspire progression in music during lockdown. Musical achievement is linked to high levels of parental involvement: a crucial factor in whether a child persists or gives up¹¹. MEPG report that some learners found recording themselves particularly helpful in building their self-awareness. Both studies also show evidence that parents, who were often in the present during online lessons, became more engaged in their child's learning.

With digital music making more popular, parents may need help to support their children's online learning. Around one third of teachers feel (some) parents attach less value to online lessons. However, teachers see benefits specifically around the teacher-parent relationship and parents getting more insight into a music lesson which further supports the learner with online lessons more visible and parents often more involved. Teachers also believe that, with online learning, students have more barriers to overcome than themselves, including instrument maintenance, internet connectivity and having a dedicated space to have a lesson.

The pandemic has accelerated the already established trend for digital assessment methods. Whilst the London College of Music and RSL (Rock School Ltd) have been offering digital exams for several years, ABRSM and Trinity College London made a shift towards online assessments as an alternative to face-to-face exams in 2020. In autumn 2020, ABRSM launched a new assessment called the Performance Grade, based on a recorded performance of four pieces played consecutively. The take up of these examinations exceeded expectations. By March 2021, more than 100,000 candidates in the UK had entered the Performance Grade.

The future of music teaching may involve a more blended approach, with online and face-to-face approaches coexisting. Our survey showed that many teachers were open to online teaching but were also keen to get back to face-to-face teaching. Over half (55%) of music teachers said they were likely to offer online classes after the lockdown particularly as a backup or as an alternative way to get around logistical barriers. Just under half said they would be likely to do remote assessments after the lockdown. However, almost all music teachers said they were looking forward to returning to face-to-face lessons. This suggests that, in the supply of music teaching services at least, the post pandemic period will incorporate a more blended approach to learning that combines online and face-to-face teaching. However, it may be that music learners demand more online and mixed options.



How is **Music Taught?**

Learning music and making progress in music requires knowledgeable, skilled, and dedicated music teachers in schools, teaching privately through one-to-one and group tuition, and in community music groups and clubs. Strong early musicianship skills are critical to a learner's future success in music. The encouragement and support of music teachers are vital to everyone who wants to progress and be the best they can be. This section looks at the music teaching workforce, who they are, how and where they teach.

Music teachers offer multiple instruments. The instruments music teachers offer have remained largely the same since 2014, with many offering multiple services. Most music teachers report that they teach piano (69%) and music theory (60%). Of the music teachers who offer piano, over half (52%) offer another instrument, 10% offer music theory and 1% offer singing. Those who teach whole class ensembles predominantly teach singing (40%) and recorder (32%). There has been a shift since the earliest ABRSM Making Music surveys, when piano was the dominant instrument taught by a large margin. In ABRSM Making Music 1994, 70% of music teachers taught only the piano with no other instrument taught by more than 7% of teachers.

Figure 37: What teachers teach

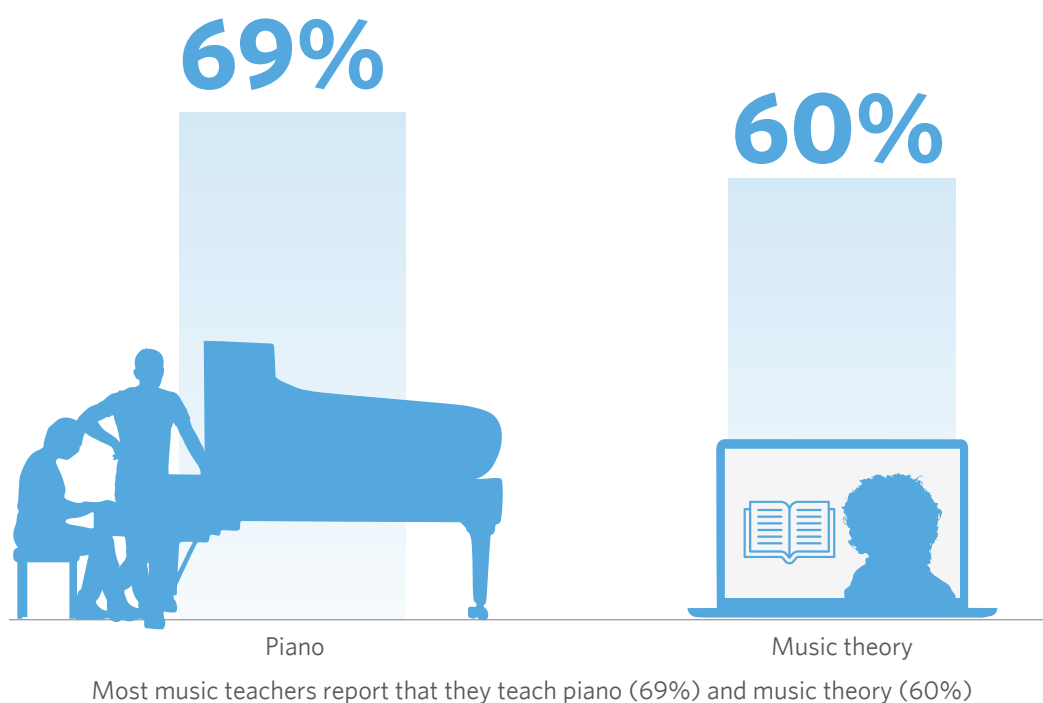
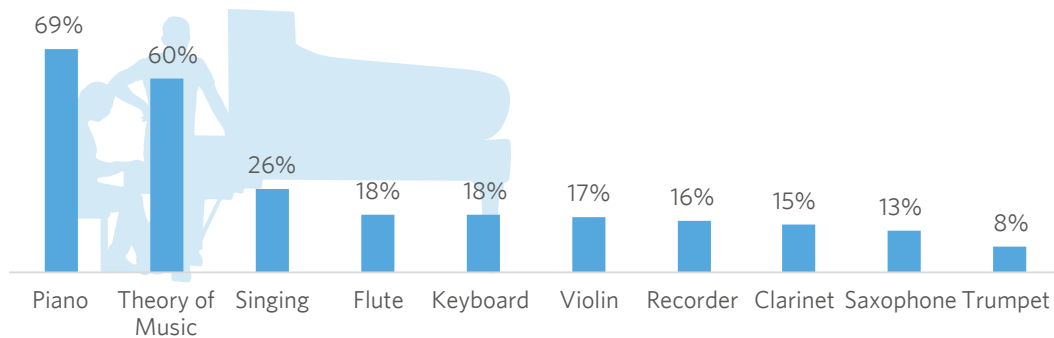
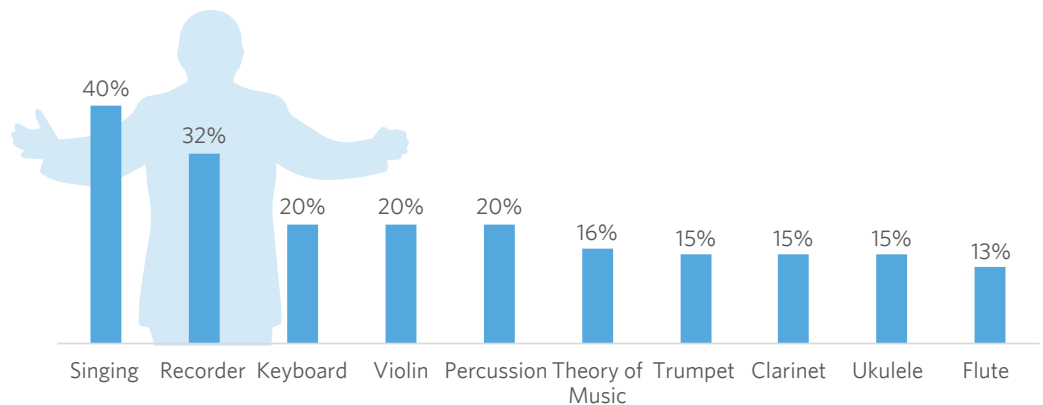


Figure 38: Top 10 subjects taught by music teachers



Base: All music teachers who responded to the survey (2,485)

Figure 39: Top 10 instruments used for Whole Class Ensemble Teaching

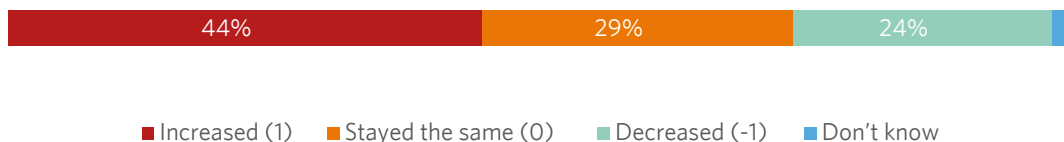


Base: All music teachers who teach WCET (476)

Teaching approaches have remained largely stable since 2014, but there is some evidence that there are fewer teachers available. Teachers are largely reporting increases in the numbers of learners they teach. There have been small increases in the proportion of teachers offering whole class ensemble lessons and teaching larger groups. However, most teachers attribute the increase in their learner numbers to more individual tuition, largely achieved through word of mouth.

While there appears to be more demand for the teachers who responded to our survey, this does not reflect the overall trend shown in the learner data. Fewer learners are reporting that they are having music lessons than previously. This could suggest that the population of music teachers is not keeping pace with demand or could be shrinking. More research is needed to understand this further.

Figure 40: Music teachers' views on whether the number of learners they teach has increased, decreased, or stayed the same



Base: All music teachers who responded to the survey (2,485)

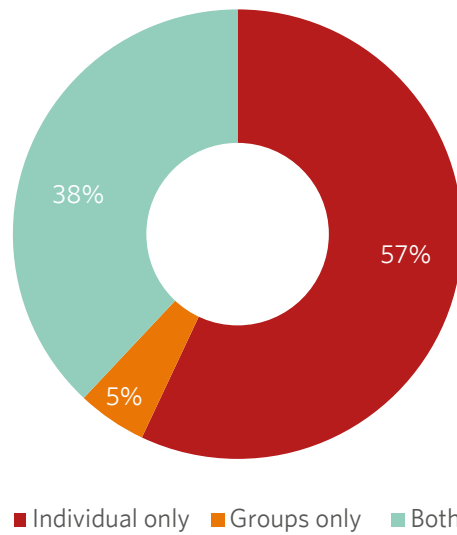
Figure 39: Top 5 Reasons for increase and decrease in student numbers



Base: Increases - all music teachers who report an increase in student numbers (1,097); Decreases - all music teachers who report a decrease in student numbers (601)

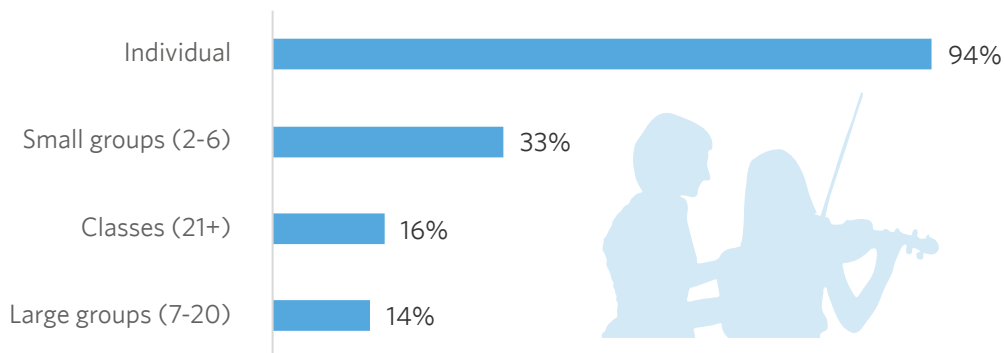
Teachers are increasingly working with larger groups. There have been small increases in the proportion of music teachers teaching larger groups and providing whole class ensemble teaching (WCET). In 2020, 16% of music teachers worked with groups of 21 or more learners compared to 12% in 2014. There has also been a small increase in the proportion of teachers providing WCET from 31% in 2014 to 33% in 2020. This suggests that group teaching is becoming a more important part of a music teacher’s portfolio. The data also reflects the sustained investment in WCET by successive governments to ensure a greater proportion of children experience instrumental music learning during school.

Figure 41: Proportion of music teachers who teach individuals only, groups only and a mixture of both



Base: All music teachers who responded to the survey (2,485)

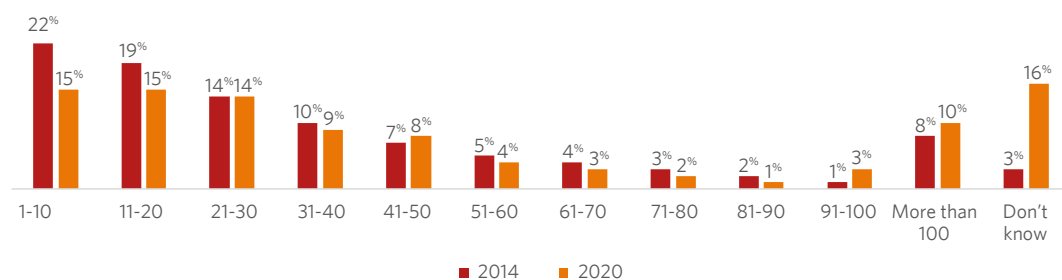
Figure 42: Music teaching group sizes



Base: All music teachers who responded to the survey (2,485)

There has been a decline in music teachers teaching smaller groups. Compared to 2014, the biggest falls are seen in the numbers of music teachers teaching between one and 10 students, followed by the numbers teaching between 10 and 20 students. Elsewhere the picture is broadly unchanged since 2014. Whilst fewer music teachers are teaching smaller groups, mostly the same proportion are teaching larger groups. Though further research is required, this could suggest that work is distributed among a smaller music teaching population overall. It also correlates with the finding that more music teaching is taking place in groups.

Figure 43: Average number of students taught in a year from 2014 and 2020

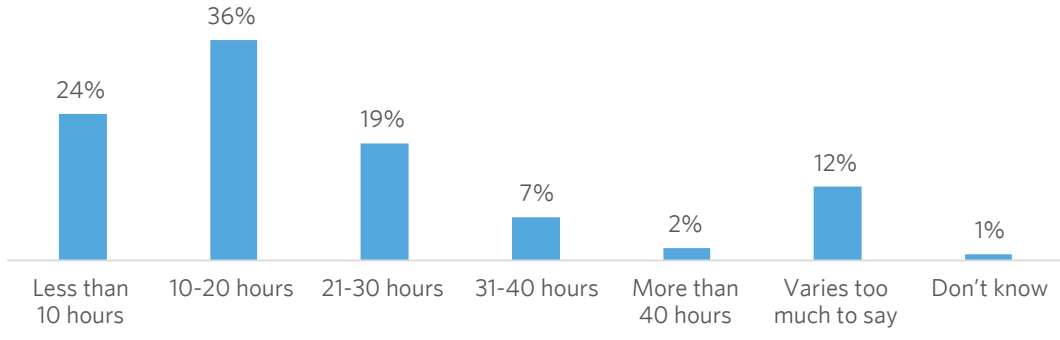


Base: All music teachers who responded to the survey in 2014 (4,491) and 2020 (2,485)

Music teachers are using individualised approaches to teaching. Music teachers were asked about their experience teaching learners who encounter disabling barriers. Many reported that they use a bespoke approach to teaching all their learners based on individual needs. Where a learner encounters specific learning needs or physical disabilities, music teachers report that they seek expert advice. However, 17% reported that adapting their teaching style has been a challenge. Other challenges include a lack of suitable material (4%) and a lack of support from parents (4%). Two fifths of music teachers report teaching learners who encounter disabling barriers. On average, each teacher has three learners who encounter disabling barriers. Most of the barriers reported include special education needs such as autism or learning difficulties such as dyslexia.

Most teachers incorporate teaching into a portfolio of work. Most music teachers surveyed appear to teach part time, with 60% of teachers reporting they provide lessons for less than 20 hours per week. Equally, participants reported that they work in a wide variety of contexts. These findings reflect the portfolio approach most professional musicians take to their career.

Figure 44: Music teacher weekly working hours

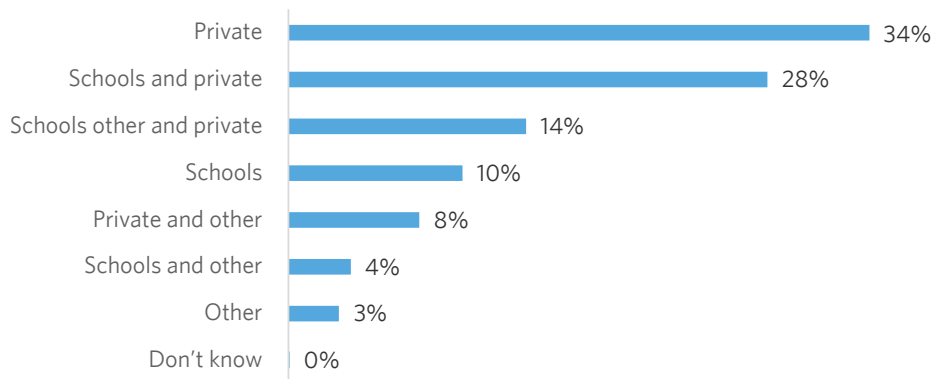


Base: All music teachers who responded to the survey (2,485)

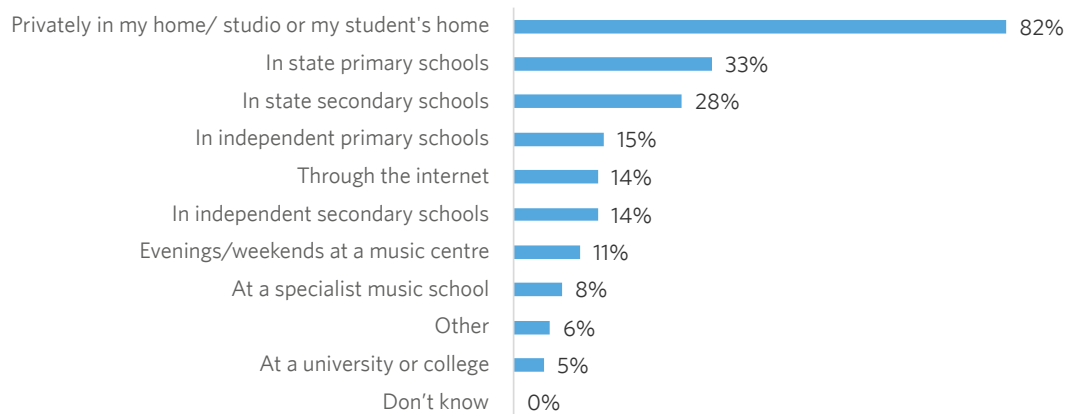
Music teachers work in diverse settings. The contexts in which music teachers work are diverse but largely unchanged since 2014. Only 34% of teachers solely teach privately, while 53% teach in a variety of different contexts. Private homes and studios are the most common locations for instrumental music lessons while a significant proportion of music teachers work in state primary and secondary schools. Most music teachers (94%) provide one-to-one instrumental lessons, while 38% also teach in groups and 5% only provide group tuition.

The career of the music teacher is often mixed between private music teaching and school settings. Only one in ten music teachers work exclusively in schools and a third of music teachers (34%) work exclusively as a private instrumental music teacher. The remainder split their time between different teaching environments. Whether in their own or their students' homes, eight out of ten music teachers work in private houses. However, one in three music teachers are either working in state primary schools (33%) or state secondary schools (28%) during the week. Again, the data show a mixed model for music teachers with private classes an important central component of their income.

Figure 45: Teaching environments

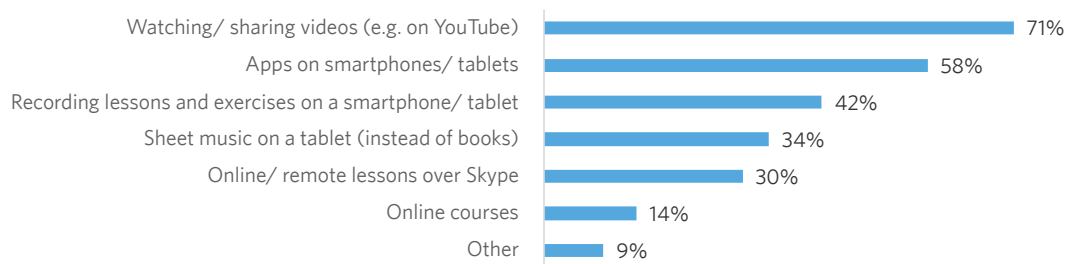


Base: All music teachers who responded to the survey (2,485)

Figure 46: Teaching environments

Base: All music teachers who responded to the survey (2,485)

Most teachers are using digital technology to engage learners. The use of digital technology is popular among music teachers with most music teachers (90%) reporting that they use some form of digital technology as part of their teaching practice. This was a new question included in the 2020 survey, so it is not possible to compare with previous data. Due to the coronavirus lockdown between March and June 2020, and ongoing social distancing requirements, most music teachers (87%) successfully moved their lessons online¹².

Figure 47: Types of digital technology used by music teachers

Base: All music teachers who responded to the survey (2,485)



How Can We **Make Progress?**

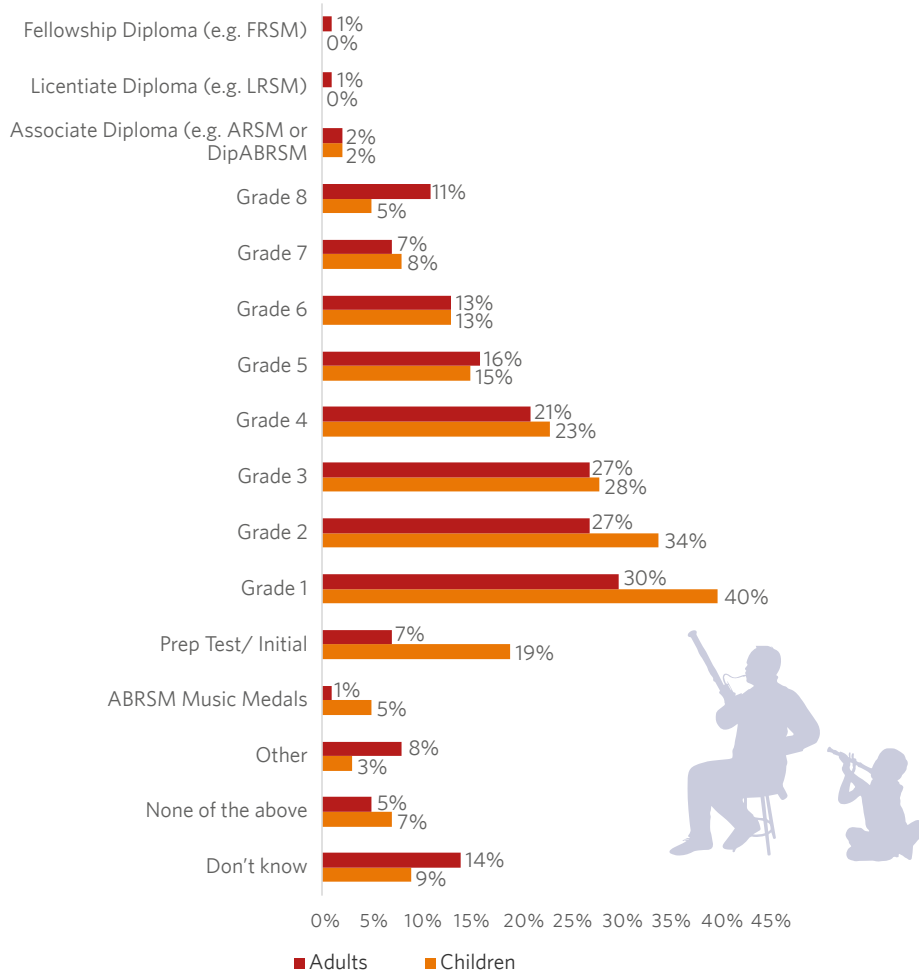
Progressing in music – getting better at the craft of music making – is known to have significant benefits for personal growth, the acquisition of a range of skills and cognitive development. Research shows that musical achievement is good for our health and wellbeing, and our connections with people. It is good for individuals, for society and the economy. Making musical progress helps us explore our creative capabilities and test the extent of our skills as we explore and achieve. It is for these reasons that ABRSM's core mission is to inspire musical achievement. Through our work on the Music Commission, which reported in 2019 and the series of ABRSM Making Music surveys we are constantly exploring ways to support music learners to be the best they can be.

Progression in music education can be defined in a variety of ways. In both the learner and teacher surveys, questions were asked to better understand how progression in instrumental music is measured and factors which can affect it. This section summarises the findings from both surveys and other data helping to explain learner progression in music.

Most music learners do not progress from group music classes at school. Few children are progressing from whole class ensembles to continue learning to play an instrument or sing, as was the case in 2014. More than half of music teachers who work with whole class ensembles report that less than 25% of their learners go on to have formal lessons on the instrument they have learned or onto a different instrument. Data captured for the Music Education Hubs annual survey in England suggests that in 2018, 26.49% of learners who participated in whole class ensemble music lessons went on to continue singing or playing an instrument. The authors of this survey, Fautley, and Whittaker, noted that it is very difficult to accurately track this progression rate¹³.

Formal progression routes are important, but the majority of those who start on this journey do not make it beyond grade 3. According to data published by Ofqual, grades 1 (36%), 2 (26%) and 3 (22%) are by far the most popular across all music exam boards. By comparison, 30% of certificates issued are for grades 4 and 5 together, while 20% are for grades 6, 7 and 8 combined. This suggests that learners using this formal route are often not progressing beyond grade 3. This reflects the findings from the child and adult surveys which show that regardless of age, the lowest level grades are the most popular with both children and adults. Of those who report taking music exams, 30% of adults and 40% of children have completed grade 1. In contrast, only 15% of children and 16% of adults have completed a grade 5 exam.

Figure 48: Music qualifications completed by children and adults in 2020

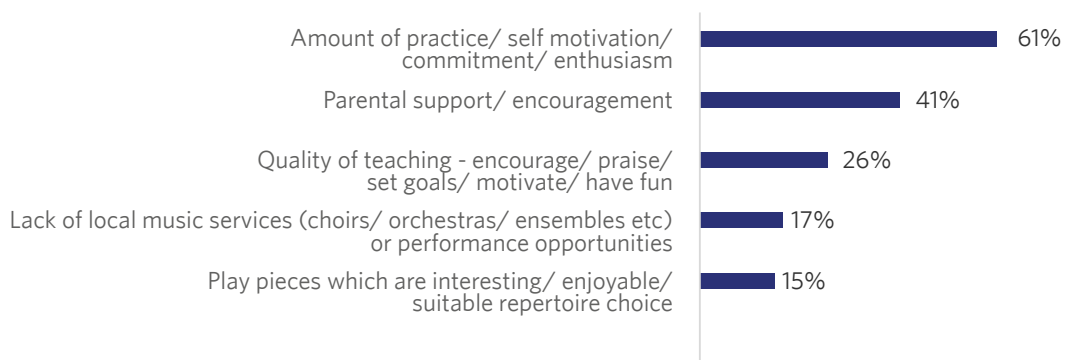


Base: All children (283) and adult (328) respondents who report taking a music exam

There has been a decline in the use of formal qualifications to mark musical progression. The proportion of children and adults who have completed a music exam have declined by 14% and 8% respectively since 2014. Data collected by Ofqual shows that in England, the number of certificates issued for graded music exams has seen a gradual decline between 2012 and 2018. In 2019 there were signs that this trend was beginning to improve with a 5% increase in certificate numbers. However, during 2020, awarding bodies issued nearly 60% fewer graded music exam qualifications than in 2019. Despite this overall trend, the Ofqual data indicates that graded music exams in pop and rock have become increasingly popular. This sector has grown by 48% between 2012 and 2019. Although rock and pop exams also suffered during 2020, the decline was lower than for grade music exams overall, with a drop of 45%. Rock and pop exam subjects are more suited to recorded or digital exams, as they require backing tracks and generally involve the use of amplified sound. Since 2015, the proportion of year 11 pupils in England completing GCSEs or BTEC First in Music has declined by 19%¹⁴. Although vocational alternatives like BTEC First in Music and other equivalent qualifications are popular, it does not make up for the decline in GCSE entries.

Amongst the factors that support learners' progression in music, enthusiasm and motivation is the most important. Excitement and interest in music lead to motivation and self-discipline, according to music teachers who participated in this survey. 61% of teachers say that motivation, practice, commitment, and enthusiasm are the key factors in ensuring learners make progress. Clearly, this enthusiasm must come from the learners themselves, but can be generated by music teachers, families, school communities and by local music organisations. Equally, the music learners play and the appeal of the musical genre, instrument, and sound they make plays an important part in whether they pursue these interests or give up.

Figure 49: Top 5 factors affecting learner progression



Base: All music leaders who responded to the survey (2,485)

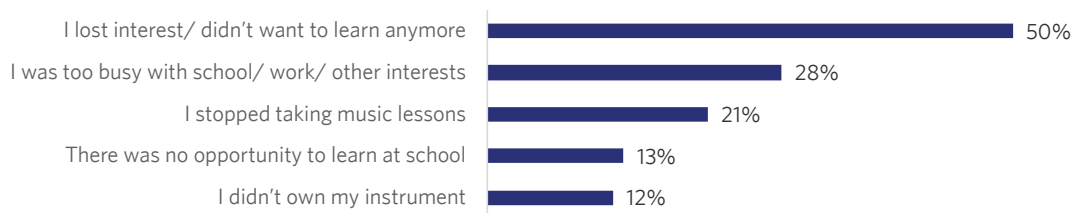
Learner attitudes and preferences have a major impact on participation. A key influence over whether children and adults engage in music making is their own attitudes and preferences. Rather than the influence of others, most children and adults believe they were ones who chose to take up an instrument rather than being directed by a teacher or parent. In 2020, 66% of children and 60% of adults report that it was their decision to begin learning to play an instrument, in line with findings from 2014. Similarly, loss or lack of interest is by a large margin the single biggest reason that children give up learning music or do not start at all. Clearly the challenge in both engaging learners and sustaining their interest, given the competing influences and demands on their time, is to ensure that learning music appeals to their preferences.

Figure 50: Proportion of children and adults who report it was their decision to start playing an instrument



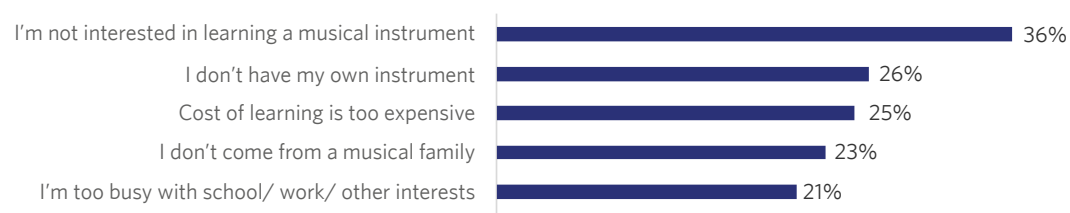
Base: All children and adults who have ever played an instrument: children (1,120), adults (949)

Figure 51: Top 5 reasons children gave for giving up their musical instrument



Base: All child respondents who no longer play a musical instrument (239)

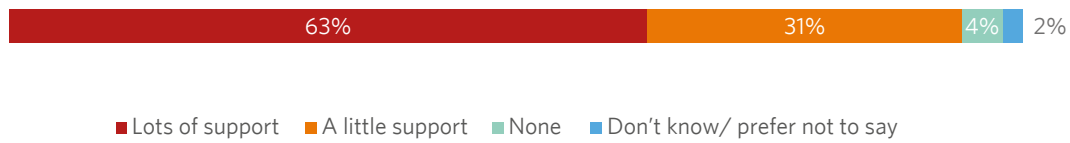
Figure 52: Top 5 reasons children gave for never learning to play a musical instrument



Base: All child respondents who have never played a musical instrument (370)

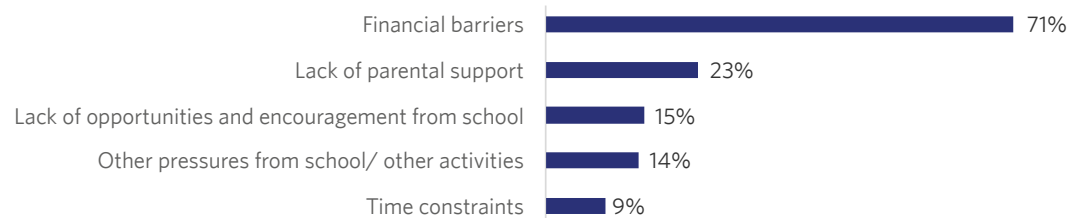
Parents and families have an important influence on young people's musical progress. Parents and families appear to be very influential in how much children engage with instrumental music making. Teachers report that parental support (41%) is a key factor affecting how well a learner progresses. Over 90% of children who have learned to play an instrument report that they either received a lot of support (63%) or a little support (31%) from their parents. One in four (23%) of teachers cite lack of parental support and 15% say that a lack of opportunities in schools (15%) create barriers to learners. In addition to the cost of instrumental tuition, parents and schools have a role to play in the progression rate from the large proportions of children who make music in whole class music lessons at school.

Figure 53: Levels of support felt by children from other parents/ carers



Base: All children who reported that they have learned to play an instrument (1,133)

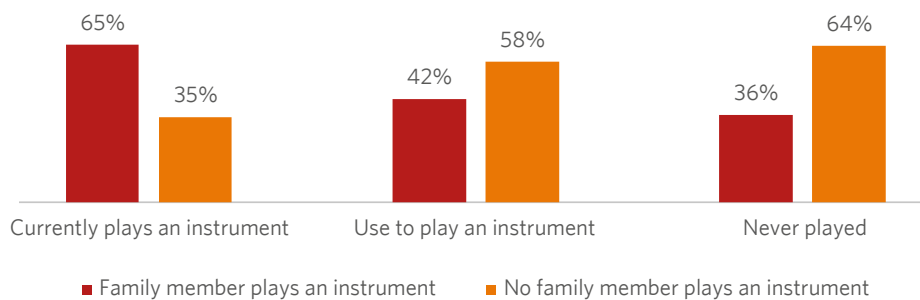
Figure 54: Top 5 barriers to learning and progression report by music teachers



Base: All music teachers who responded to the survey (2,485)

Music in the family influences whether children learn music. Nearly two thirds of children who currently play an instrument have a family member who has also learned to play. In contrast nearly two thirds of those who have never played an instrument come from a family where no members have learned to play. 31% of parents decide whether their children should play an instrument and 17% of children were inspired to take up an instrument because another member of their family plays. Of those who have never played, 23% report that this was because they do not come from a musical family. The data suggests that a concerted effort to involve non-playing parents in music education, including informing them of its benefits and simple steps they can take to encourage their children to play, could have a significant impact on learner participation and progression.

Figure 55: Proportion of child learners with a family member who plays an instrument



Base: All children who responded to the survey (1,503); Currently plays an instrument (881). Used to play an instrument (239). Never played (370)

Cost is a significant barrier to making progress in music. Most music teachers (71%) report that the cost of music lessons is a barrier for learners. In 2020, 25% of children and 18% of adults who have never played an instrument report that this was because of the cost. This barrier is especially important for children from the poorest households, with 37% reporting that cost is a barrier to taking up an instrument.

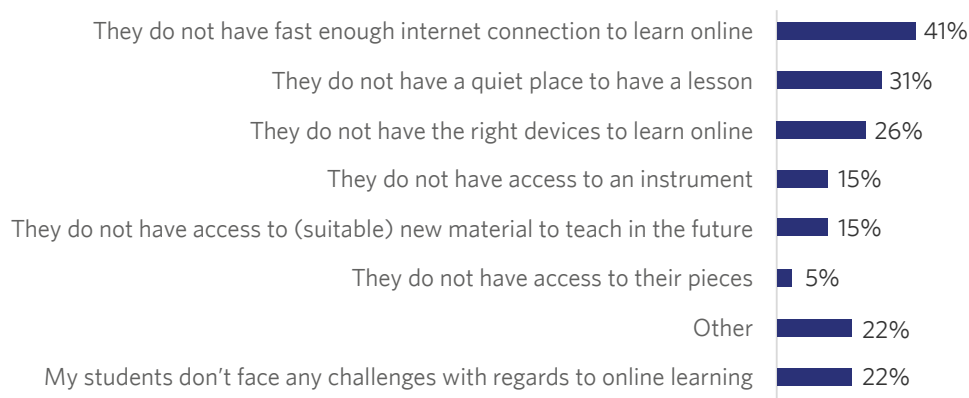
Progression in formal routes is linked to household income. The data shows that children and adults from the richest households are 2.5 times more likely to take music exams than those from the poorest backgrounds and this remains unchanged from 2014. It matches the findings from the Education Policy Institute who report that music is among the most in-egalitarian subjects for GCSE learners in England in 2020¹⁵. They found that learners from disadvantaged backgrounds are 38% less likely to take GCSE Music than those from the richest households. Where disadvantaged learners do complete GCSE Music, their progress is 20 months behind richer learners.

Children from low-income families are much less likely to engage in music activities outside school. The Social Mobility Commission has argued that “Music... is clearly the preserve of more affluent family households”¹⁶. Their data shows that 11% of children from the poorest households take part in extracurricular music activities, compared to 32% of children from the wealthiest households. This, and the likelihood of taking music qualification, indicates a correlation between a learner’s socio-economic background and their progression in music education.

Teachers say internet access and practice space were the main challenges during lockdown. Poor internet access presents a problem for some teachers and learners and has been a barrier to effective online music lessons. The biggest block appears to have been intermittent internet access in some areas, and poor-quality audio from video conferencing software, with 41% teachers reporting this as an issue for their pupils.

Figure 56: Perceived challenges for students. Among all teachers (%)

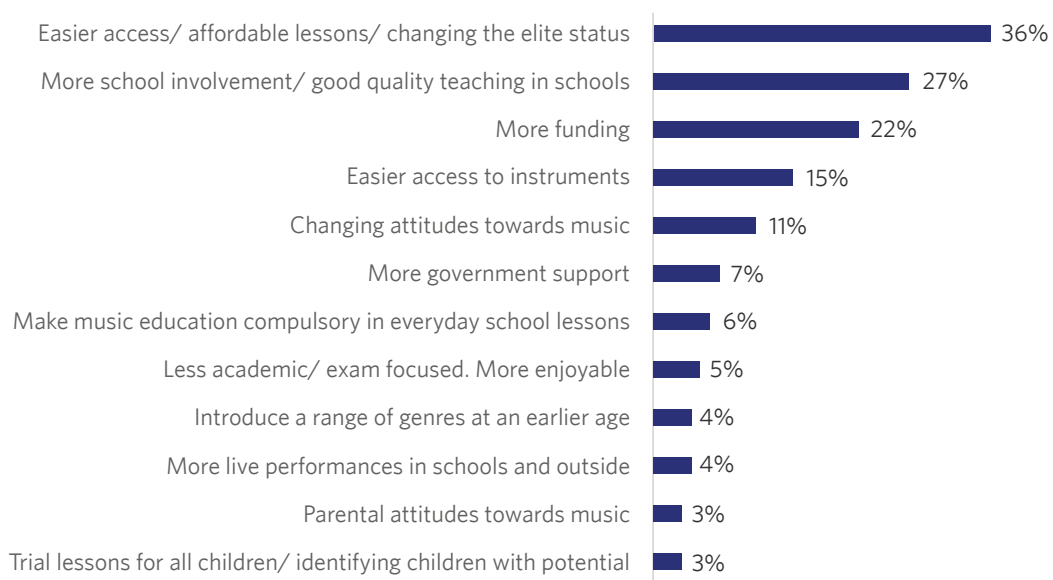
(Q14b-Please let us know which of the following challenges your students face with regards to online teaching)



Base: All teachers (294)

When teachers say what should change, access, affordability and schools are the most important themes. Cost and changing the elite status of music education are cited by most teachers when asked how to increase the numbers of children learning music. A significant proportion of music teachers also say that improving the music experience at school, either through high quality teaching or the school offering more support for music as a subject, is important. These two themes are mirrored in other responses to this question and are seen elsewhere in this report. They clearly show that schools have a vital role to play in nurturing and support children’s interest in learning music and that, if the barriers to progressing this interest can be lowered, far more children would choose music as a lifelong passion.

Figure 57: Changes suggested by teachers to nurture music makers



Base: All teachers

Making Music: **A Window to the Future**

As we have seen, the making, learning, and teaching of music has seen significant change. Our ABRSM Making Music surveys have provided a rich source of evidence to help understand those changes so that music education can adapt in the future. In this section, we interpret the current situation and look at the potential trajectory that our surveys suggest to imagine what music education that is thriving could look like in the future and the support this will need.

Towards a New Model for Music Education

Whilst learning to play an instrument is a cornerstone of music education – and understanding how music works remains a vital foundation for progress – our definitions over the past 25 years no longer reflect the contemporary world. The fundamentals of learning music have not changed – and never will. But the application of that knowledge and understanding is now far richer. This throws a challenge to the sector – how to adapt and shape our offer, and how best to support young people in this changing world. If, as we see, learners are doing more for themselves, peer-peer, and online, it is important to consider what these learners need from teachers and formal provision.

Music Teaching Workforce

The future music teaching workforce will be far more balanced in terms of gender, age, and currently under-represented groups. To some extent these teachers and mentors already exist as members of the community and the profession. One important task is to welcome them into the teaching profession. In so doing, music teachers will be in even greater step with contemporary society, as the art-form becomes more eclectic, global, exploratory, and rich. Further, professional development for music teachers and improved network connections will be transformed so that they can access resources, ideas, and innovative tools to ensure teaching is modern and relevant for learners.

Parents

Musical achievement is linked to high levels of parental involvement, and the teacher, parent, learner interaction has real energy when it works well. The future will see a much higher priority placed on parental engagement with music in early years and beyond. Improving parental engagement to support learners' musical progress will become an explicit goal for schools and music organisations. There will be improved partnerships with broadcasters and the music industry to develop new parent-focused resources and information not just on the value of music education, but where they can access support and funding to help their children take the next step in their musical journey.

Instruments

The future of music and music education will see young musicians experimenting as multi-instrumentalists, digital manipulators, and creative collaborators. Falls in those taking instrumental lessons or examinations may be a warning or may indicate an opportunity to think differently about how talent is nurtured. The music education model may be moving away from someone seeing themselves as a violinist, for example, and towards someone who describes themselves as a creative, an artist, and a musician. Picking up a trombone, for example, may be one of several tasks that are required to create the music, along with coding, editing, singing harmonies, and adding other instruments.

Schools

Music in schools is here to stay. It is the single most important place where young people access music making, though the future will see a different school-based music education model emerging. Knowing how music is made can provide the conditions for an explosion of musical creativity, and schools will focus on the fundamental components of music to give learners the tools for self-exploration. The challenge then is to encourage young creatives both in and out of school. Schools will have much greater contact with the rich and diverse provision of music across the community. Some of this provision will find its way into schools, whilst young people will be directed to those services that meet their aspirations and needs.

Virtual Collaboration

The rapid development in digital technologies opens up new opportunities for teachers and learners to work with other music makers regionally, nationally, globally. Teachers will bring individual students together to share ideas, perform to one another, and be part of inspiring presentations. Schools will increasingly connect with colleagues regionally, nationally, globally. Imagine, for example, the gamelan session - the indigenous orchestra type of the islands of Java and Bali in Indonesia - in a local secondary school being delivered in collaboration with colleagues and peers in Jakarta.

Digital Teaching and Assessment

Music teachers will be using online platforms to offer support to learners as part of a new blended model. These approaches will value face-to-face learning but use new ways to offer lessons, bring students together and provide flexible support that is designed around the learner. Digital assessment will become the norm; not replacing traditional examinations but becoming part of a richer mix in which learners can exercise greater choice and access is widened. Over time, blended teaching and learning will see technology transform core teaching materials, providing different forms of engagement, and removing barriers to learning to deliver a more personalised pathway for learners.

Connecting Around the Learner Journey

As we have seen in ABRSM Making Music 2021, falls in formal learning at school and with independent teachers may not spell a decline for music making at all. For many learners, after the primary years, music education can be much more about the exploration of music in social groups and at home. The challenge is to meet learners where they are and to connect a range of provision around the learner's journey.

As we can already see through the expansion in access to digital technologies, learners are increasingly exploring and developing their musical skills independently. The role of music educators is to provide the building blocks of music in the early stages, provide inspiration and access to a truly global world of music making, and operate as expert guides and mentors. In many respects, the very existence of music education will depend on the extent to which the music education sector, including schools, community music organisations, private teachers and those that provide services to music educators can connect and build integrated support around the learner.

ABRSM's Commitment to **Making Music in the UK and Beyond**

We will respond to the challenges and opportunities identified in the latest ABRSM Making Music findings by:

Widening understanding

ABRSM Making Music reports have given us an invaluable view of the challenges and opportunities for musical progression in the UK over the last 27 years. However, we are a global music education charity and want to build similar understandings of some of the key music learning trends and issues in countries and communities around the world. Over the coming years, we plan to develop a series of interim reports which focus on different regions of the world before then producing a global ABRSM Making Music report, possibly in 2025.

Convening support

Barriers to access to music learning, and subsequent progression, highlighted in the latest ABRSM Making Music survey have deep cultural and societal roots and impact on the entire music education sector. We will work with others to explore solutions, in part, by convening the joined-up sector responses that are needed to start to address these issues and promote wider access to music learning.

Sharing expertise

ABRSM is the UK's largest music education charity and has expertise and a perspective that few other music education partners can offer. We will continue to share this knowledge across the sector and beyond in order to promote our vision for music education.

We will contribute to the forthcoming National Plan for Music Education and provide our perspectives on meeting the needs of new generations of learners through sector debates.

We will look beyond the UK to work with new partners and contribute to discussions on connecting with new audiences of learners, share our experience of digital solutions and add our thinking around learner-centred approaches to complement understanding about music learning and progression in regions around the world.

Working to widen access

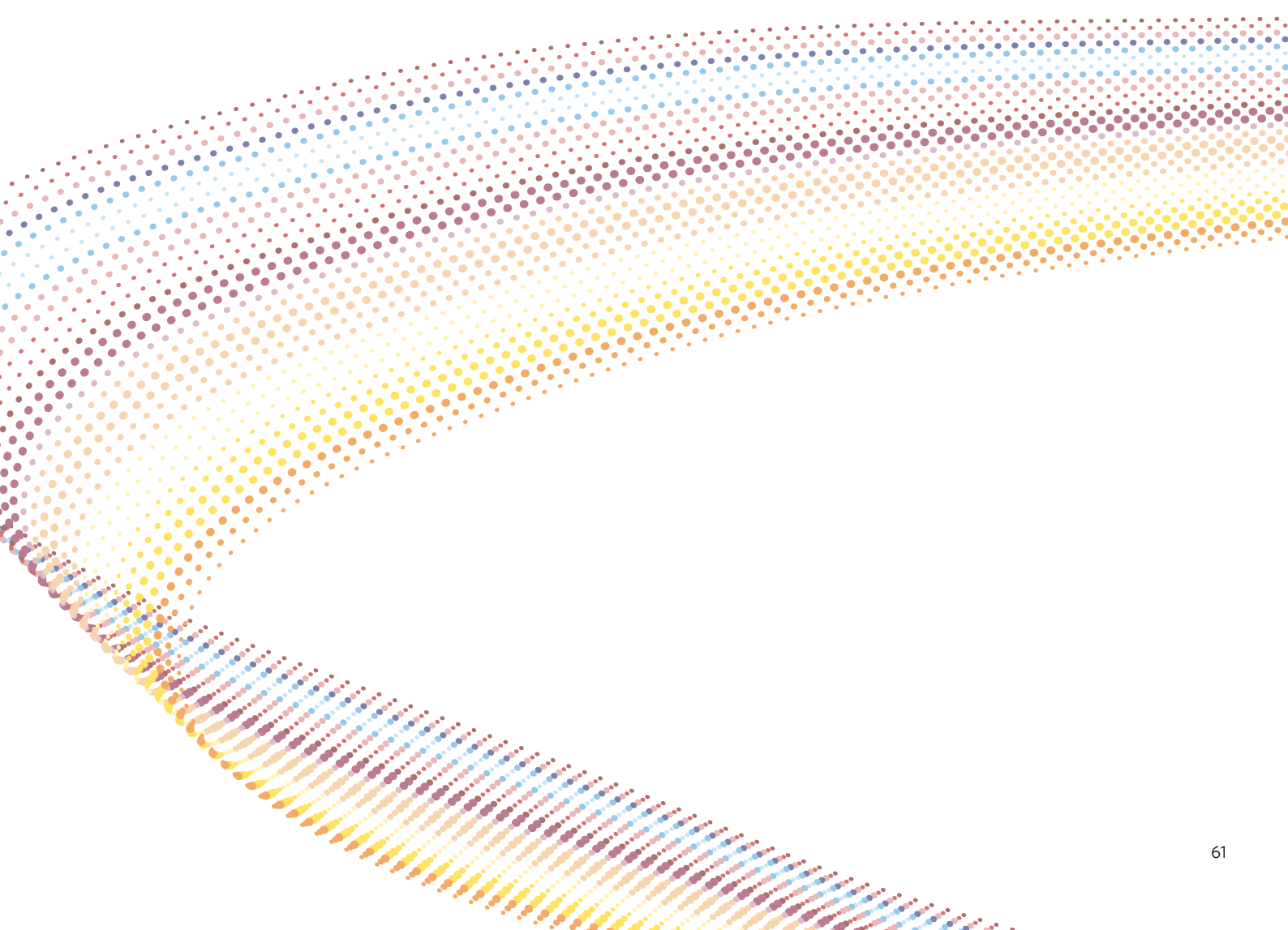
ABRSM is focused on creating the conditions needed to help more people gain access to music learning and progression by developing and delivering initiatives like our composer mentor scheme.

We will build on this momentum by going both 'deeper,' and 'wider,' looking at how we, as a music education organisation, can better reflect the world around us, and by exploring ways in which we can widen access to music learning for people from all kinds of backgrounds, and in all regions of the world.

We recognise that many of the barriers to music learning are issues with a root cause within society. We are part of a musical community and can only be part of a solution in partnership with others to overcome the challenges people may face.

Investing in future talent

We are committed to contributing to grassroots development of musical talent through our relationships with the Royal Schools and the organisations we choose to sponsor, and our work in the countries in which we operate around the world.



- ¹ ABRSM's Teacher Voices Survey of 300 customers and examiners published in June 2020
- ² <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland>
- ³ For the purpose of this report, "musically active" is defined as someone who currently plays an instrument, participates in group music activities, or creates music in another way. This could be in a formal or informal setting.
- ⁴ ABRSM Making Music 2014
- ⁵ ABRSM Making Music 2014
- ⁶ Institute for Fiscal Studies (2020) Inequalities in children's experiences of home learning during the COVID-19 lockdown in England, <https://www.ifs.org.uk/uploads/publications/wps/WP202026-Inequalities-childrens-experiences-home-learning-during-COVID-19-lockdown-England.pdf>
- ⁷ Fautley, M & Whittaker, A. (2018) Key Data on Music Education 2017, https://www.artscouncil.org.uk/sites/default/files/download-file/KeyDataOnMusicEducationHubs2017_0.pdf
- ⁸ ABRSM's Teacher Voices Survey of 300 customers and examiners published in June 2020
- ⁹ Ibid
- ¹⁰ MEPG, 2020, We Make Music Online
- ¹¹ The role of Parental Influences in the Development of Musical Performance, *British Journal of Developmental Psychology*, 14: 399-412
- ¹² ABRSM (2020) Instrumental Music Lessons During Lockdown
- ¹³ Fautley & Whittaker (2018)
- ¹⁴ Calculations based on DfE data of England's year 11 population (<https://explore-education-statistics.service.gov.uk/data-tables/permalink/15210c1f-71ef-49d3-bbf8-5dbdc0fdee80>), JCQ data of number of GCSE Music entries, Ofqual data of number of certificates issued for BTEC First in Music.
- ¹⁵ EPI (2020) Education in England: Annual Report 2020, page 13
- ¹⁶ Social Mobility Commission (2019) Unequal Playing Field, page 31

**LEARNING, PLAYING
AND TEACHING**
IN THE UK IN 2021