



**TOI MAI**

Workforce  
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# **Needs Analysis for the proposed New Zealand Certificate in Piano Tuning and Technology (Level 4)**

**Prepared by the New Zealand Piano Tuners and Technicians Guild Inc.**

**January 2022**

The New Zealand Piano Tuners and Technicians Guild Inc. has been concerned, since its inception in the 1980s, about the lack of training for piano tuners, the shortage of piano tuners, the less than acceptable skill level of some current practitioners, and the difficulties of providing training in an unregulated industry where most tradesmen are sole traders. Addressing these issues lies at the heart of the Guild's objectives. Recent, untimely deaths within our aging workforce, coupled with the onset of Covid 19 shutting down overseas training and recruitment has exacerbated the situation.

To improve the situation for the future piano users and tradesmen we hope to help facilitate the establishment of a National Qualification in Piano Tuning and Piano Technology. To that end we have engaged with the Ministry of Education and NZQA and have undertaken some research to support the need for such a qualification and the subsequent delivery of training.

We are supplying the following in support of that application.

## 1. Survey of Industry

Results of a personal and phone survey of NZ Piano Tuners August 2020, conducted by NZPTTG, appear below (some details updated since then):

67 active piano tuners were surveyed, which likely represents at least 95 % of New Zealand's active piano tuners. (See Stats NZ information below.)

The age break down was as follows:

<b>under 30</b>	7%
<b>31-40</b>	13%
<b>41-50</b>	13 %
<b>51-60</b>	28%
<b>61-70</b>	22%
<b>71-87</b>	10%

In other words, **60% of the working piano tuners in NZ are 51 years or older.** Less than half of the 71-87 age group classed themselves as retired or semi-retired.

There have been three piano tuner deaths in 2020 and one tuner who has been permanently incapacitated by a serious medical event. The NZ piano tuner workforce declined by 4 in 2020.

### Workload

Much like doctors or hairdressers, piano tuners have regular repeat customers who need their pianos tuned once, twice or more a year or tuned for specific events, concerts etc.

- 41% stated that they were over busy, over booked, unable to book their regular customers at an acceptable forward date. Unable to comfortably schedule their regular customers. (In Auckland in February 2022 typical booking times are two months ahead.)
- 47 % stated their workload was about correct.
- 12 % could /would accept more work.

### The ability of Piano Tuners to employ or train.

- More than 72 % of piano tuners are sole practitioners. Many surveyed identified the need to train new tuners but stated that as a busy sole trader it was impossible to contemplate training an apprentice either from time available, current workload or

loss of income perspective.

- 3 identified as employees.
- 4 identified as employers.
- 3 businesses were 2 person partnerships. (One very busy partnership recently failed to manage to keep a trainee in part time tuition.)
- The largest employment grouping was of 3 people although there were several who offered or shared work with other practitioners on an informal basis.

#### **Those surveyed identified specific regions that are short of piano tuners.**

- Marlborough, Nelson.
- Central Otago.
- Christchurch. Canterbury region. Is currently regularly serviced by out of area piano tuners.
- West Coast.
- Waikato.
- Taupo. Rotorua.
- Thames /Coromandel
- Auckland. Commonly thought to have a shortage of approx 2-3 tuners.
- Warkworth / Wellsford.
- Northland, Whangarei, Kerikeri, Kaitaia.

#### **Piano tuners with overseas training and those holding Work Visas.**

- Currently none, due to Covid but typical numbers historically would have been 2-3 at any time.
- 18 of 67 (27%) received their primary, apprentice level, training overseas.

#### **Casual and part time Piano Tuners**

Separate and additional to all the above there were 5 piano tuners who stated that piano tuning was a secondary income, not their main source of income. The work standards of casual itinerant tuners sometimes leave much to be desired.

#### **Current Trainees**

Again separate and additional to all the above were 6 who identified themselves as to full or part time trainees. At a 2020 NZPTTG training day 7 enthusiastic trainees were coached on basic piano tuning and repairs by senior members of the Guild. Three of these are undertaking a foreign based correspondence course. Two have mentoring arrangements with established tuners to assist with their training. There is one trainee whose employers class him as an employee. The remainder pick up what training as and where they can.

At the end of that training day 4 of the 7-attending indicated that they would be keen to attend structured training leading to a qualification.

There is demand and regular approaches to individual tuners and our organisation seeking training. A recent example: *"I am writing to you as my son is interested in a piano tuning apprenticeship. He is currently in Year 12 studying Music, Art, English, Mathematics, Graphic Design and Chemistry*      *How does one go about gaining an apprenticeship*

*opportunity? How long is an apprenticeship? Are there different places around NZ that may offer an apprenticeship?"* This person was rebuffed by his local tuner citing his sole trader status and heavy workload.

## **2. Current employment and training environment**

**Statistics NZ.** supplied the following additional information.

Category. 399515 Musical Instrument Maker or Repairer

Definition - Builds, repairs and restores musical instruments, and modifies and tunes them to owners' specifications. Specialisation: Piano Tuner

According to the 2018 Census count there were 129 employed under this code.

**Please note.** This category also includes repairers of other musical instruments, e.g., organs, violins cellos, brass woodwind and percussion instruments, hence the discrepancy in numbers between this and our survey.

### **Inability for those wanting to train as Piano tuners to find training in New Zealand.**

Possibly partly in response to information on the NZ Careers website at <https://schools.look4.net.nz/careers/australian-careers/australian-careers-descriptions/specialised-craft-and-equipment-manufacturing-and-repair-careers/piano-tuner-technician>, the NZPTTG receives at least one application a month while some of our members report being approached at similar rates by prospective trainees/apprentices. We have developed a standard response letter stating there are no training schools in New Zealand or Australia. Although a relevant qualification, the recently reviewed Certificate IV in Piano Technology, is listed on the national register of vocational education and training, it has not been delivered for many years and there are no current approved programmes. There are training schools and factory training in Japan, USA, Europe and UK and excellent apprentice training in Europe. The last known one year fee for the, now defunct Melbourne based Australasian School of Piano Technology was A\$30,000 plus accommodation etc., (1 NZ graduate). There is currently one senior Australian technician investigating offering a one-year intensive course. He estimates the actual cost per student would be A\$100,000. We also mention that there are correspondence courses, but these are only satisfactory when fully supported by an engaged local mentor. We also advise them that they may approach local tuners to see if they would contemplate taking a trainee/apprentice. However, we know that this is very unlikely as many are over-busy sole traders. In short there are extremely few openings for new piano tuner trainees in NZ.

The general standard of piano tuner work in New Zealand is unfortunately variable, as might be expected in an unregulated industry where there has been no New Zealand standardized training. The current benchmark for piano tuners has de facto become the entry exam to the NZPTTG. This standard is the same as that provided by the entry exam for the Australasian Piano Tuners and Technicians Association, and is also recognised by the Piano Tuners Guild in the USA. It is designed to represent the standard a competent piano tuner should easily achieve. However, a single day Guild entry exam represents a different standard to that which can be achieved by a comprehensive structured training course where theory and practice and good work practice and experience go hand in hand and are rehearsed and practiced and appraised over time until they are second nature for the trainee.

While not all current NZ Piano tuners are fully competent it would be fair to say, that with some exceptions those who have had the benefit of apprentice-type training with continuous monitoring by a trainer have better developed skills. Some recent trainees have recognised gaps in their skills. Some were never well trained and might be encouraged to up-skill if there were appropriate structured training available although this is not the primary motivation for this application. It might also be noted that the nature of the piano tuning and repair work is particularly suited to apprenticeship type training.

Some competent tuners have managed to train apprentices to a good standard and some of these have accessed supplementary training at Piano Tuners Conventions and overseas training. The Piano Tuning industry in New Zealand has been reliant on competent foreign trained Tuner/technicians emigrating here and topping up of the pool of New Zealand trained Piano Tuners. With Covid at large, Work Visas and Immigration are unlikely to provide NZ with well trained tuners for the foreseeable future. This should also be seen against a background of a long-established worldwide shortage of piano tuners. Evidence of these shortages can be provided.

A basic reading of all the above suggests that there is currently a nationwide shortfall of at least 5 piano tuners. There are currently at least 6 trainees, using everything from self-tuition (1) correspondence courses (3) plus attendance at once or twice a year one day NZPTTG training days (7), employee learning on the job (1), accessing mentoring with one or more technicians. (3). With an aging work force we should be formally training at least this many people annually for the benefit of the New Zealand Musicians.

The latest 2022 *Europiano* magazine has 16 positions advertised across Europe and includes 2 in NZ. The previous magazine had similar numbers and a different position advertised in NZ. This indicates that we cannot solve our shortage of piano tuners by importing already trained technicians. The worldwide shortage is simply too great.

### 3. Stakeholder comments

We also approached approx 100 stakeholders to support this initiative: Music Teachers, Music Examiners, University Music Departments, Schools, Musicians, Pianists, Music retailers, Orchestras, Choral organisations, Music publishers, archives, and performing rights Assn, Radio. Australasian Piano Tuner and Technicians Assn. Etc. We have 30 positive responses, some quite impassioned.

I quote from a few. Full list and responses available.

**Pianist:** *"As a performing artist and educator, I cannot stress enough how important it is for both professional and upcoming pianists to have access to high level, fully trained and qualified piano technicians and tuners. A well-tuned and regulated piano is essential for a pianist to practice and perform to the best of their ability, whether it be for solo, ensemble, or orchestral (including concerto) playing. Untold hours are spent preparing for performances, and **there is nothing more soul-destroying than arriving at a concert venue to find a poorly maintained and tuned piano.** The musicians are left frustrated, the audience doesn't receive the best possible performance."*

**University Piano tutor.** *"Piano tuning and maintenance is at the core of what we do as professional pianists and piano educators. Without adequate maintenance it is impossible for us to do our job. It is also impossible for the students that we teach, both at the university and in the community, to operate without an adequately tuned and maintained instrument. Pianos are an expensive investment, and without regular maintenance soon deteriorate. Therefore, it is imperative that we have expertly trained piano tuners in order to preserve the standard of our instruments. It is indeed disturbing to note that there is currently no training qualification offered in New Zealand for this profession. A large proportion of the current tuners in this country are approaching retirement age and without trained replacements we face a serious situation. An NZQA approved qualification would go a long way to remedying this situation. Young apprentices would then see piano tuning and maintenance as a viable career option."*

**Pianist:** *"I have been giving concerts throughout New Zealand for over 45 years, My experience of playing many pianos in this time is that there is an enormous range of quality in the preparation and tuning of pianos both in professional venues and domestically. I think that a NZ based qualification would be a big step forward in the standardisation of quality in this profession. I also know that every piano tuner and technician I come into contact with is overwhelmed with work, and that we have a shortage of suitable qualified practitioners in this*

country.”

**Retailer:** *"To those who think that the piano is a rapidly disappearing relic of past musical times, industry statistics contradict that: in 2019 sales of portable keyboards fell 12% in dollar value, whereas acoustic pianos rose 6% (uprights) and 8% (grands) [ Australian Music Association 2019 Statistics <https://australianmusic.asn.au/industry-statistics/>]"*. 2022 update note: The situation during Covid has significantly worsened as piano sales have significantly increased and the wait times for new piano instore preparation and after sale tuning and servicing have stretched even further.

**Major Retailer:** *"Despite the prevalence of digital options, Acoustic pianos are a steadily growing category. Essential to the sale and support of pianos is the ability to move, tune and service these instruments over their lifetime.*

*A piano – even a basic one – represents a significant investment for any client and is a legacy purchase i.e. quality pianos are kept for years and often passed through generations.*

*We have seen a strong increase in demand in the educational space as the piano represents a core and fundamental instrument in any music program Music – and musical performance – has exploded in the educational sector as the importance of music –as another pathway to learning and engagement – has been widely accepted. There is no substitute for a skilled, well trained and experienced professional to tune and service a piano. I use the term tuner / technician interchangeably. A complex and technical instrument, a tuner cannot perform their task without a fundamental understanding (and a considerable level of experience) of the mechanical and tonal elements of the instrument. On delivery to the store, all pianos are tuned at least once.....When sold, every piano is tuned again. At this time, there is a critical shortage of qualified tuners with wait times blowing out, denying clients the opportunity to use their instrument Even in major metro centres, access to a technician is generally measured in weeks, not days. With a significant investment in the instrument, it is incumbent on us as retailers, to ensure (and assure) our clients that any piano tuner is properly trained and experienced.*

**New Zealand Choral Federation:** *"The NZCF is an umbrella organisation representing the interests of over 20,000 members drawn from more than 500 chamber, community, church, school and special interest choirs. The NZCF provides a host of local and regional performance opportunities for choirs, including the annual nationwide secondary students' competition, The Big Sing, involving around 260 choirs in festivals held in 10 centres around New Zealand. The vast majority of our choirs sing with piano accompaniment for some, if not all, of their performances and rely heavily on having access to expertly-tuned pianos in their concert venues".*

#### **4. Proposed qualification**

The establishment of a qualification and formal training would address a number of issues highlighted above:

It would provide a pathway for training in New Zealand where graduates would be of a known and recognised standard, as opposed to the current situation where the standards range from troublingly incompetent to professional. In particular:

- It would avoid the present multitude of training methods and variable standards.
- It would address the current shortfall of tradesmen.
- It would reduce the previously prevalent necessity to import trained tuners.
- It would provide access to training funding for trainees and trainers.
- It may offer a pathway for current practitioners to up-skill.

The establishment of a qualification for piano tuners and technicians in New Zealand would

address many of the issues raised in the document above, however we believe the benefits to New Zealand society would also extend beyond the obvious advantages of having well trained industry professionals.

The piano adds to our nation's cultural landscape in many and sometimes surprising ways and the increase in competent piano technicians would have a positive long-term benefit across numerous artistic activities.

The community of piano users in Aotearoa/New Zealand is broad and diverse; use of the piano is practically universal, it includes private pianists, local community choirs and bands, professional pianists and musicians and artists representing our country on the world stage.

Music and the widely acknowledged peripheral benefits flowing from music education are all unimaginable without the piano. A student learning piano is simultaneously introduced to multiple other educational disciplines: science, mathematics, literature, history, languages, and even coding – as in, music notation.

Beyond purely musical applications, the piano has, since its arrival in New Zealand, become a fundamental part of this country's cultural and artistic landscape. Jane Mander's early classic novel *The Story of a New Zealand River* highlights the importance of the piano in our society, a theme revisited in Michael Parekowhai's 2011 Venice Biennale sculptural work *He Korero Purakau mo Te Awanui o Te Motu: story of a New Zealand river*.

Without an official qualification to encourage the training of New Zealand piano tuners and technicians, the cultural landscape of New Zealand will suffer in a number of ways: Access to qualified tuners/technicians is vital for artists, from Elton John to Diana Krall or Coldplay or Tim Minchin or our own Kiri Te Kanawa, Tim Finn, Michael Houstoun, Stephen de Pledge, Terrence Dennis or Grammy nominated Simon O'Neill. Some of the above are already "declining" to perform in venues where instruments are known to be poorly maintained. There is already a shortage of expertly prepared concert quality pianos in venues and recording studios across New Zealand. These artists and the recording industry, including New Zealand's growing film music industry frequently have very specific piano quality / condition demands written into their contracts. Without a focus on improving the piano tuner training within the industry, the country undermines these artists' best performances.

To meet existing demand, New Zealand has until now relied on importing piano tuners and technicians, sometimes of variable quality. One piano service business was recruiting one overseas trained tuner technician for every New Zealander they themselves trained and employed. We need to turn this trajectory around. In this age of streaming and online video, sharing New Zealand music has never been easier, but without access to well-maintained instruments, the standard of locally produced music will decline.

This is a profession that requires technical proficiency and highly developed skills achieved only after many many hours of training. It is still wrongly seen by many as an amateur pursuit. A qualification for piano tuners and technicians will benefit those devoting themselves to formal training by raising the professionalism and competency

of the whole industry. This will in turn signal piano tuning and it as a viable career option. Without this change, the declines and chronic shortages of skilled practitioners we are already seeing will simply accelerate.

Music and the piano occupy and will continue to occupy a central space in New Zealand's households and society. Without well-looked-after instruments, New Zealanders' experiences of so many musical performances will be diminished. A lack of competent piano tuners/technicians will impact the quality of our opera, our world class piano performers, our chamber, choral and orchestral music, our church music, our singer-songwriters and our jazz, rock, brass and alternative bands. Performance based music in schools, a growing area in our education system will not have the necessary good pitch and tonal benchmarks for the students. Piano tuning will not be seen as a worthwhile or viable career with an

available training path.

Without the standard of a formal qualification, the less scrupulous and untrained will continue to charge for such blatantly incompetent work that it should correctly be called fraud.

We have a unique and varied cultural tapestry woven from many different threads, Excellent piano tuning and service is just one thread in our rich tapestry, but a broken thread quickly leads to a rip and then a tear.

Establishing a qualification in Piano tuning, repair and maintenance would be a powerful investment in our future.

Yours, Ngā mihi,

A handwritten signature in blue ink, appearing to read 'David Jenkin', with a stylized flourish above the name.

David Jenkin for NZPTTG committee.