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THE CURRENT STATE OF THE OFF-CAMPUS MUSIC EDUCATION INDUSTRY IN CHINA

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Abstract. Currently, China's after-school music education industry is developing, with the support of national policies, growing parent awareness, and the development of the Internet. However, music training market is facing a range of problems, such as inconsistent industry standardization, expansion impediments, insufficient faculty and curriculum system, and flaws in business model and management. Through the observation of China's off-campus music industry in COVID-19 pandemic time, combined with the analysis of policy documents issued by the Chinese government in recent years, this paper summarizes the current issues in China's off-campus music education industry and puts forward suggestions for its improvement.

Keywords: music education; music education industry; aesthetic education; off-campus music training; online training partner.

With the development of society, more and more parents pay attention to cultivating their children's comprehensive ability and aesthetic values. Art education and music education in particular is believed to improve children's concentration, memory, imagination, develop the left and right brain, edify sentiment, artistic taste, etc.

In China, music education can be roughly divided into two categories: school music education and after-school (extracurricular) music education. Most school education is academically focused and subject related. Teaching music is multidisciplinary intertwined with morality and the rule of law, Chinese history, Geography, Mathematics, foreign languages (English, Russian, Japanese), Physics, Chemistry, and Biology.

Although there is music education in schools, the teaching content and teaching purpose are very different. In fact, after-school music education has always been in an early form of professional music education, while school music education is still a

universal art education with the theme of "aesthetic education". It is precisely because school music cannot meet the needs of parents and students for professional music that the after-school music training industry will gradually develop.

Due to the lack of music teachers and the insufficient facilities in music classrooms, the development of music education in schools is lagging behind. More problems and challenges are due to the unequal level of economic development of provinces and rural and urban areas. Schools in economically developed areas and private schools with high fees pay more attention to the quality education and offer aesthetic education courses such as music, art and physical education. At the same time, the vast majority of Chinese students, if they want to learn music, have to choose private tutorials or off-campus music training institutions.

In recent years, the country has successively issued a series of policy documents. In October, 2020 "Opinions on Comprehensive-



ly Strengthening and Improving School Aesthetic Education” issued by the Central Office and the State Council stated that by 2022 the school aesthetic education evaluation system will gradually be improved. Exploring the implementation of art subjects in the pilot reform of the high school entrance examination, we need to mention Wang Dengfeng, Director-General of the Department of Physical, Health and Arts Education under the Ministry of Education (MOE), who claims that aesthetic assessment should be included into the general standards for high school enrolment and would be promoted on a pilot basis to cover the whole country by 2022.

From the guidance of the national policy, the status of aesthetic education is gradually increasing. Aesthetic education comprises aesthetic literacy development, cultivation of values and attitudes, creativity and imagination, sentiment and spiritual education. Art education is the main course in aesthetic education. Aesthetic education is designed “to improve students’ aesthetic accomplishment and nourish their hearts through music, art, dance and other art disciplines” [2].

According to the training content, off-school music education and training can be roughly divided into instrumental music training and vocal music training [4]. As for age group and training purpose of students, it can be divided into children’s music training, music Gaokao (National Higher Education Exam) training and adult music training. According to the “2020 General Report on China’s Music Industry Development” released by the project team in the Music Industry Development and Research Center of the Communication University of China, the scale of the music education and training industry in 2019 was 92 billion yuan, up 7.9 % year on year. Among them, the music grade test was taken by about 1.69 million applicants, the music grade test industry was about 84.85 billion RMB. The music Gaokao

industry scale was represented by about 143,000 applicants, and the training industry was about 7.15 billion RMB.

From the data, the music grading industry accounts for the majority of the music education and training. Compared with other quality education categories that generally lack a recognized evaluation system, the social grading system of music education has been developed for many years, and is recognized by the majority of consumers, which makes the grading examination an important driving force for children’s music training.

Music Gaokao training is aimed at the high school students who are going to take Music as a major university entrance test. In recent years, the overall number of music Gaokao applicants has shown a steady trend of growth. In general, there is a small number of very talented students who can enter professional music colleges. Most parents encourage their children to learn music for utilitarian purposes, for extra points, awards and so on.

Adult music training, in its turn, is focused on adults over 18. At present, there is still a big gap between China’s art training and that of other developed countries, but in the future, with the upgrading of consumption and aesthetic appreciation, adult music training will have a lot of room for growth.

The General Office of the Central Committee of China’s Communist Party and the General Office of the State Council on July 24, 2021 jointly released the “Opinions on Further Reducing the Burden of Homework and Off-Campus Training for Compulsory Education Students”. The ultimate purpose of the “double reduction” policy is to reduce students’ excessive learning burden, protect their health, reduce parents’ burden and anxiety, and reduce social injustice [3]. After the launch of this “double reduction” policy there was a decline in curriculum-based off-campus institutions. It directly limits the size



of curriculum-based off-campus institutions and reduces the length of its extracurricular training.

According to Morgan Stanley's "K12 AST: Upgrading on New Sources of Growth" released on 8 March 2022, "We expect growth in the non-academic tutoring market to accelerate to 25% YoY in 2022 to Rmb709bn (from Rmb578bn in 2021) as some of the previous demand for academic tutoring shifts to non-academic tutoring, especially for younger students" [1].

From the perspective of user needs, some parents and students still continue to participate in the music grade examination and music gaokao needs. After years of development, the music grading examination and the music gaokao have formed a mature evaluation system, and the training standards have also been formed. This type of training has become the rigid need of some parents and students.

Let us consider the problems existing in the current off-campus music training industry. There are two ways of off-campus music training, one is the traditional offline mode, the other is the Internet online education mode, both requiring improvements. As for the traditional education model, there are three major problems in offline after-school music training.

Firstly, difficult to expand if the industry standardization is not unified: compared with academic tutoring, music education needs to be carried out through teacher demonstration and guidance, and the teaching mode is usually 1 on 1 or small class, with frequent communication and guidance. Traditional in-class education is subject to geographical factors, the high level of art education development often has a strong relationship with the level of economic development. Therefore, most of the music training institutions in the society are carried by some piano shops and individual studios with both teaching functions. These institutions are highly

dispersed, have a single function, extensive management and serious homogenization. Regional professional off-campus music institutions, due to the above mentioned reasons, are difficult to expand.

Secondly, the sphere is witnessing a weak faculty and curriculum system. According to data from IMedia Consulting, 70.5 % of art education consumer users focus on faculty. At present, the professional level of teachers in various after-school music training institutions is uneven, the mobility is large, the teaching quality is difficult to guarantee, and there is a shortage of high-quality teachers. Excellent teachers are difficult to replicate and train through standardized training in the short term; not many graduates engage in music training every year [5].

Moreover, the curriculum system is not perfect, there are problems such as single curriculum, homogeneous courses, and lack of creativity. On the one hand, small and medium-sized institutions themselves do not have the research and development ability of the curriculum system; on the other hand, the results of art training cannot be quantitatively evaluated. Without a perfect teaching system and effective after-school supervision and guidance, the learning results are not significant for students and their parents.

Thirdly, there are challenges caused by insufficient business model and management flaws, such as daily teacher attendance, student course statistics, financial settlement, activity marketing, etc. Educational administration and after-school services cannot form standardized and systematic norms, which is another heavy obstacle to the development of the sphere, and it is impossible to expand more local education sites. Therefore, enhancing accountability and improving service levels has also become an important driver to promote the sound development of the music training industry.

In addition, offline music education also has the pain points of low teacher utilization



rate, expensive tuition, low renewal rate and high time costs. At the same time, the offline model is irreplaceable as it has the advantages of on-site guidance and feedback from teachers, especially teaching musical instrument performance. Since the outbreak of COVID-19 in 2020, local education authorities have successively issued notices to inform primary and secondary schools and various after-school training institutions to stop offline teaching. As a result, offline education and training institutions are faced with difficulties such as course delay, refund rate increase, high labor and site rent costs, and the capital chain and operation capacity are facing great pressure.

Under the wave of online, digital and intelligent education, the business model of music education has been innovated. Online methods include online music teaching, online music training partner and online music course platform. Among them, there are online music teaching services providing music teaching through live broadcast and recording, such as Newband (牛班), Dainichangge vocal music online school (戴你唱歌声乐网校); online music training by music teachers or AI, such as VIP Peilian (VIP陪练), Xiaoyezi Peilian (小叶子陪练); online music courses platform connects course providers and users, such as Finger.

Among many subdivided categories, online music partner has risen and become the darling of many capitals and the market. According to China Daily.com, By 2016, the number of children learning piano in China exceeded 30 million and the number has risen by 10 percent every year since [1]. Thanks to the huge piano children market, online piano training partner has become the most popular capital track.

The development history of the domestic online music training industry is not long,

and several institutions with good development in the industry were basically established around 2015. After the formation of the VIP Peilian in 2014, Kuai Peilian (快陪练), grapefruit piano practice(柚子练琴), Finger, Qu Peilian, Panda piano Peilian (Later changed to Xiaoyezi Peilian) and other platforms were put together [5]. In the online training partner mode, there are real person training partners and AI training partners.

In the real-person practice partner mode represented by VIP Peilian, music teachers guide piano children online and realize real-time interactive feedback; breaking the time and space restrictions, effectively connecting high-quality teachers and students, while users can arrange a piano practice time more freely and flexibly. However, in this mode, the strength of teachers is more critical. It is common that the number of high-quality music teachers cannot match the number of students, which leads to the problem of music training partner supply is less than demand. The 1-on-1 training partner model also makes it difficult to achieve the scale, and the business scale of the platform completely depends on the number of teachers.

Due to the current technical reasons, AI helps children learn to practice the piano, which can only detect the wrong sounds, and it is difficult to identify the fingering errors, key intensity, music rhythm, etc., so AI training partners cannot completely solve the relevant pain points.

There are also more and more musical instruments on online training platforms. In addition to the piano training partner, which has occupied the mainstream position for a long time, various western instruments and ethnic Musical Instruments, such as violin and guzheng, were also born to meet the diversified needs of users. Manufacturers represented by VIP Peilian and Xiaoyezi Peilian are trying to standardize the process of online



music practice training, making the online music practice mode replicable.

Unfortunately, the online training partners that have solved students' issues are struggling to solve their own business model issues. The scale of in-person 1-on-1 training partners is not efficient, and enterprises also have to invest quite high costs in platform technology and user operation. With the withdrawal of capital, online training institutions because experience problems. On November 30, 2020, grapefruit piano practice (柚子练琴) declared bankruptcy. In November 2021, Kuai Peilian (快陪练) declared bankruptcy. In June 2022, VIP Peilian, China's largest online music training platform, has also suspended classes, unpaid wages, and suspected closures [1]. External factors have accelerated the collapse of the platform, but the serious product homogeneity and low competition barriers in the online training partner industry are the fundamental reasons why the platform is forced to withdraw from the competition.

In general, the weaknesses of the traditional offline classroom can be compensated by online education characterized by more flexibility, easier resource access, no location restrictions. The blending of both models can maximize the integration of quality education resources, the use of technology, online + offline complementarity and collaborative development may become the mainstream trend of institutions to seek future development.

After considering the current issues in off-campus music industry, we propose suggestions for solving the problems. Policy improvement and regulation is on the agenda, so the music training industry is in transition from brutal growth to the standard maturity. In October 2021, the People's Daily published an article titled "Building a New Pattern of Off-campus Art Education", pointing out that the evaluation standards of art grading examination should be clearly defined, and the off-campus art teacher qualification

certification system should be established to gradually realize the off-campus art teachers with certificates, ensure the quality of teachers, and improve the supervision mechanism of off-campus art education [2].

In the supporting documents after the release of the double reduction policy, there is also no lack of requirements for non-academic tutoring institutions, in the qualification, charges, advertising, general operation and other aspects of the restrictions. In the key points of work for 2022, it is clear that all regions are required to divide the three non-academic tutoring institutions into sports, culture, art and curriculum-based, so as to avoid the "brutal growth" situation like curriculum-based off-campus tutoring courses [1].

On October 29, 2021, the Ministry of Education and other six departments issued a Notice on Strengthening the Supervision of Pre-fees for After-school Training Institutions, clarifying that pre-fees for disciplines and non-disciplines after-school training institutions should be fully included in the scope of supervision, aiming to effectively prevent problems affecting the occurrence of "difficult refund" and "running away with money" and other harm the interests of the people [1]. On November 3, 2021, the State Administration for Market Regulation (SAMR) and other eight departments issued the Notice on the Control of after-campus training advertisements, proposing to concentrate their time and efforts on the comprehensive investigation and cleaning of after-campus training advertisements without distinguishing disciplines and non-disciplines [1]. This means that the unqualified non-academic tutoring institutions will be held accountable by the law, and there will be stronger supervision in terms of fees and advertising. Therefore, for music training institutions, maintaining legal compliance, standardized operation, ensuring survival is the primary



issue to maintain a healthy cash flow and improve the ability to resist risks is crucial.

Driven by the policy of comprehensively developing quality education, after-school curriculum is an important way to develop quality education in schools. National policies encourage schools to purchase high-quality after-school services to provide a beneficial supplement to quality education in schools. The number of students in the compulsory education section is large, and the potential demand is strong, which provides a broad space for the development of art education and training institutions.

After the influence of external factors such as COVID-19 and the “double reduction” policy, the whole industry will undergo a round of reshuffle. Traditional offline 1-on-1 and small workshop type training may face elimination, the industry concentration is expected to improve, and the pattern of music training track may change.

As the economic development shifts from coastal areas to inland areas, the first-tier and second-tier markets are saturated, and the future market potential is in the third-tier and fourth-tier cities. Third-tier and fourth-tier cities have a large number of users and a large demand for music education, which will promote new growth in the off-campus music industry. With the development of 5G and other technologies, the traditional offline model will accelerate the integration with online, and the OMO model is a great oppor-

tunity for decentralized localization institutions to achieve curve overtaking.

Music education market has great potential, driven by policy improvement, facilities upgrading, technological progress, and growing consumer demand [1]. The mainstream trend comprises blending online and offline mode, co-training guidance, and accountability assurance that will improve efficiency of music education, break the dilemma of music education regionalization and decentralization, and cultivate aesthetic values and skills development.

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