

Research on the Sources of Development Pressure for Social Art Education Institutions under the “Double Reduction” Policy—Take Guangdong Chunyin Music Education as an Example

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Abstract

Under the “Double Reduction” policy, social art education institutions face a complex situation with both opportunities and challenges. This study takes the case of Guangdong Chunyin Music Education (CME). Using grounded theory methods, through in-depth interviews with managers, teachers, and parents, and a three-level coding analysis of multi-source data, a three-dimensional stressor model of “policy-market-organization” is constructed. Research shows that policy environment pressures stem from higher qualification costs and course compliance issues. Market pressures involve resource misallocation due to demand fluctuations and brand repositioning resulting from competition. Organizational challenges include faculty structural conflicts, scale-quality imbalances, and digital capability gaps. The study proposes three paths: 1) Policy adaptation through government-enterprise communication, compliance management, and course innovation; 2) Operational optimization via flexible faculty allocation, OMO models, and digital enhancement; 3) Resource integration by strengthening brand chains, franchisee risk-sharing mechanisms, and reserve systems. This framework helps institutions address “Double Reduction” policy pressures.

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1. Introduction

In July 2021, the General Office of the Central Committee of the Communist Party of China and the General Office of the State Council jointly issued the “Opinions on Further Reducing the Burden of Homework and Off-Campus Tutoring for Students in the Compulsory Education Stage” (hereinafter referred to as the “Double Reduction” policy) (Council, 2021). The policy explicitly outlines the necessity to comprehensively regulate off-campus tutoring activities. It mandates that subject-based training institutions be uniformly registered as non-profit organizations and prohibits their capitalization. Simultaneously, it encourages non-subject-based training institutions to complement quality education by providing supplementary services. This policy has reshaped China’s off-campus education ecosystem, leading to a sharp contraction in the subject-based training market, while non-subject-based training institutions such as arts and sports have seen new opportunities. However, the policy has also imposed stricter requirements for the qualification review, curriculum compliance, and financial supervision of off-campus training institutions, coupled with parents’ shifting educational needs towards quality and personalized education, leaving non-subject-based institutions in a complex situation where “opportunities coexist with pressures (Qin, 2022).”

The Guangdong-Hong Kong-Macao Greater Bay Area, as an important region of Guangdong Province, is experiencing a growing demand for art education. Among these, the Guangdong Chunyin Music Education has developed into a large-scale operation with over 64 stores distributed across Guangzhou, Huizhou, and Dongguan. Under the “Double Reduction” policy, the Chunyin Music Education has benefited from increased student enrollment due to the spillover effect of subject-based training demand, but it also faces pressures such as rising compliance costs, increased teacher turnover, and greater demands for curriculum innovation. Therefore, this study aims to examine the sources of pressure on social art education institutions, using the Guangdong Chunyin Music Education as a case study, against the backdrop of the background of the “Double Reduction” policy (Chen et al., 2022).

2. Research Status

Following the implementation of the “Double Reduction” policy, scholars have recommended that non-academic institutions integrate innovative technologies and digital transformation to adapt to policy requirements, market dynamics, and societal needs, while also analyzing institutional stressors.

Zhou and Qi (2022) noted that the “Double Reduction” policy restructured the educational ecosystem by regulating off-campus training, thereby driving growth demand for non-academic services. However, heightened requirements for qualification reviews, curriculum compliance, and financial oversight have created a dual scenario of “opportunities and pressures coexisting.” Zou (2022) emphasized that art institutions must balance policy compliance with market demands, optimizing curricula and operational models to address dual challenges of rising regulatory costs and parental expectations for quality-oriented education.

Scholars propose modernization strategies for art institution operations: Ge (2021) advocated for differentiated positioning and curriculum innovation to break through homogenized competition. Han et al. (2021) proposed integrating “Internet + Artificial Intelligence + Education,” by utilizing tools such as virtual simulation and MOOCs to innovate teaching methods. Gao (2021) applied the 4C theory and OMO (Online-Merge-Offline) models to optimize resource integration and pricing strategies. Liu (2022) highlighted that teacher turnover requires mitigation through incentive mechanisms and career development systems. Wang and Yao (2012) categorized stressors as interactions between external environments (e.g., policy, market) and internal operations (e.g., resources, human resources). Cui et al. (2014) introduced a role stress framework, arguing that teachers’ multitasking (e.g., instruction, curriculum development, parent communication) leads to role overload. Xu and Meng (2004) developed an “individual-organization” stress model, identifying both individual stressors and organizational stressors. Yan and Lian (2023) identified unique pressures during OMO transitions, such as inadequate technological investment and weak digital literacy among teachers, while Jiang (2022) emphasized cash flow risks as the critical nexus for policy-market pressure transmission.

Dong and Yang (2024) applied grounded theory to construct a higher education management model, providing methodological framework for analyzing the dynamic pressure transmission mechanisms in art institutions.

Existing research predominantly focuses on macro policy effects and single-case analyses, lacking systematic exploration of regional chain institutions' stress dynamics across the full chain of "policy adaptation, demand transformation, and resource restructuring." This study addresses this gap by constructing a three-dimensional stress model through grounded theory, using Guangdong Chunyin Piano Studio as a case study, thereby offering practical insights for the field.

3. Research Method

This study strictly follows the three-level coding process of grounded theory to ensure the scientific and rigorous construction of the theory. First is open coding, in which in-depth interviews (with 16 managers, teachers, and parents), participant observation records, policy documents, and institutional annual reports are analyzed sentence by sentence to extract initial concepts. Next is association coding, which involves integrating the categories from open coding through logical axes such as causal conditions, phenomena, contexts, and action strategies. Finally, selective coding is conducted to further analyze and integrate other core elements after consolidating the main categories (Charmaz, 2006).

4. Construction of Pressure Source Model for the Development of Social Art Education Institutions

4.1 Research Subject

Chunyin Music Education was founded in 2006 and has a history of 19 years as of 2025, with over 140,000 students trained. Initially focusing on music education, grading exams, and instrument sales, it gradually evolved into a comprehensive arts training institution. During the pandemic in 2020, the store expanded against the trend, opening five new branches within two months (including the Dongjiang Xuefu branch in Guangdong and the Kangcheng Sijisi branch). It now has 64 branches in total. The operating model adopts a franchise approach to attract investors, offering a "guaranteed equity crowdfunding" plan where franchisees can participate with an investment of 25,000 yuan, with headquarters promising to recoup costs within two years and bear any losses. During the pandemic, the store raised over 20 million yuan through financing to support its expansion.

CME are densely distributed in Guangdong. Their scaled operations align with the regional competitive landscape and the pressure sources of art institution development under the "Double Reduction" policy analyzed in this study. By collecting diverse data through the store's curriculum system, promotional activities, and media releases, we can capture more comprehensive sources of pressure for these institutions. Therefore, Pure Tone Music Stores in Guangdong are selected as case studies for this research.

4.2 Data Source

This study collected and organized relevant materials about CME through various channels. The main methods were threefold: first, in-depth interviews with three managers, five teachers, and several parents; second, data collected during internships at the music stores through course implementation and communication with parents; third, news reports, literature, and promotional and evaluative content from social media and online platforms related to Guangdong Chunyin Music Education. The data were imported into Nvivo12 software, and the nodes were classified. The classified nodes were coded step by step, and a word frequency search was conducted. The minimum word frequency was set to 2, and the word cloud map of Guangdong Chunyin Music Educations Shop was exported to assist the coding (Figure 1).

4.4 Association Coding

This step entails conducting an in-depth analysis of the original concepts extracted through open coding, parsing relationships between concepts to form initial categories, and subsequently integrating them. After several rounds of iterative analysis, 53 initial categories were finally refined into 23 main categories.

Table 2 Association coding based on open coding

No.	fundamental category	subcategory	Label the initial data fragment
A01	Policy dividends coexist with the impact of the epidemic	The number of applicants has increased since the “double reduction” policy, but the epidemic has hit offline teaching	(a1) When the “double reduction” policy was implemented, the number of people who signed up and went to the store for consultation gradually increased. However, it was hit by the epidemic, and the stores did not combine the online teaching mode well.
A02	Online transformation capital constraints	The capital of franchisees is limited and they cannot develop online teaching mode	(A2) Franchise stores are usually owned by the store manager as the legal person, and can only rely on the store’s financial resources to fund the online teaching model
.....
A23	Regulatory gaps expose risks	The education bureau needs to re-examine the qualifications	(A53) The Guangzhou Education Bureau issued a regulation stipulating that the maximum amount of advance payment for off-campus training institutions should not exceed 3 months or 60 class hours.

4.5 Core Coding

In this study, five core stress sources were identified from the content of 23 main axis categories: external environment and operational adaptability, faculty management and resource allocation, enrollment strategy and pricing mechanisms, brand image and service quality, and industry supervision and the lack of consumer protection.

Table 3 Selective coding based on spindle type

fundamental category	Core areas
Policy dividends coexist with the impact of the epidemic Online transformation capital constraints The curriculum is rigid Franchisee risk transfer strategy	Policy adaptability
Part-time teachers rely on performance Teaching and research capabilities support transformation Price strategy and performance contradiction There is a shortage of unpopular teachers Full-time teachers are given preferential treatment The recruitment process is inefficient	Faculty management and resource allocation
Enrollment renewal drives operations The concentration of grading needs Seasonal marketing strategies Geographical advantage depends Value perception weakens price sensitivity	Enrollment strategy and pricing system
Word of mouth effect Brand trust drives choice Service response timeliness Home-school communication isolation	Brand image and service quality

Academic affairs and comprehensive service role Increased sense of security in the environment builds trust	
Prepaid model risks Regulatory gaps expose risks	Lack of industry regulation and consumer protection

5. Model construction

After the three-level coding of grounded theory, the five sources of pressure of Guangdong Chunyin Music Educations were finally identified to establish its pressure source model (as shown in the figure). According to the content, these five sources of pressure can be categorized into three dimensions: policy, market and organizational operation.

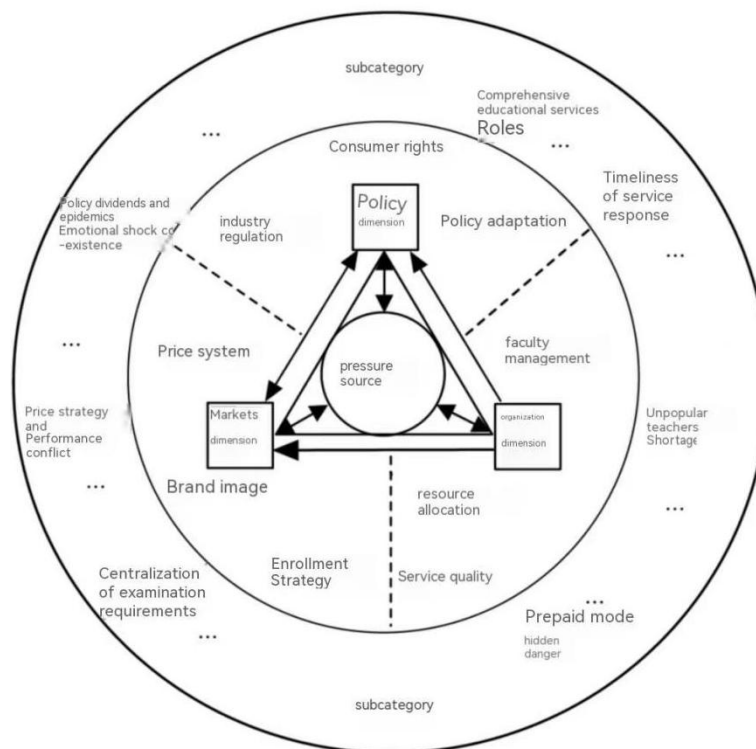


Figure 2 Pressure source model of CME

6. Analysis of Stress Sources in the Dimension of Policy Environment

6.1 Analysis of Stress Sources in the Dimension of Policy Environment

(1) The pressure of qualification examination is transferred to operating costs

Following the implementation of the “Double Reduction” policy, local authorities introduced corresponding secondary policies to align with the national guidelines. However, the interaction between these policies and market realities has resulted in significant structural contradictions. According to the venue standards set out in the “Guangdong Province Standards for the Establishment of Off-Campus Cultural and Art Training Institutions (Trial),” about half of the existing CME store need to relocate or undergo renovate. Each store’s renovation costs have increased by an average of 100,000 yuan. This cost overrun has directly resulted in a reduction of Chunyin’s teacher training budget in 2022. A notable case is the Huizhou branch of Chunyin Music Store, which was forced to close for three months due to failing fire safety inspections. This incident resulted in refunds totaling approximately 100,000 yuan for 34

students, underscoring the immense pressure faced by small and micro franchise stores due to the rigid enforcement of these policies.

(2) Increased course compliance reduces funding

The three-month fee cap introduced by the “Double Reduction” policy has significantly reduced advance payments for music schools, cutting revenues by more than half. Moreover, the “Double Reduction” policy’s push for quality education has created deep-seated contradictions with market demand. While developing music literacy courses has increased R&D costs, the renewal rate for new courses is less than 40%. The policy’s requirement to reduce exam-oriented education (a53) and parents’ preference for grading certificates exacerbate the imbalance between investment in curriculum innovation and market returns. Additionally, the pressure on course development has intensified, creating additional financial and operational challenges for institutions striving to meet both policy and market expectations.

6.2 Analysis of Stress Sources in the Dimension of Market Environment

(1) Increased demand volatility leads to resource misallocation

The special market pulse phenomenon during winter and summer vacation grading seasons is evident, with CME offering discounts also during these periods. However, during non-grading periods, 41% of their time remains unscheduled, resulting in a cyclical imbalance characterized by “teacher shortages during peak seasons and manpower waste during off-peak seasons.” The misalignment exacerbates dual pressures: the proportion of part-time teachers rises to 48% (a5), causing a decline in teaching standards. For instance, the Zhongkai branch was reported and penalized for employing unlicensed teachers (a27). Meanwhile, fixed costs during off-peak seasons inevitably result in financial losses, further straining operational sustainability.

(2) Upgraded competition creates pressure for brand remodeling

The differentiated competitive strategies of emerging institutions have led to a dimensional reduction in competition. In 2022, Guangdong City added seven new “AI intelligent training” institutions, attracting a significant number of customers. In contrast, CME continued to rely on traditional methods. Parent interviews revealed that Pure Tone Music Store was forced to initiate a brand upgrade plan. On one hand, the store invested in introducing an intelligent teaching system, with a single-store equipment investment of approximate 98,000 yuan. On the other hand, it launched digital transformation initiatives such as “live-streamed classes by renowned teachers,” to remain competitive in the evolving market.

6.3 Analysis of Stress Sources in Organizational Operation Dimension

(1) Structural pressure on teachers has intensified

The institutional distinction between full-time and part-time teachers harbors potential risks. Open coding reveals that full-time teachers account for 70% of the workplace but they teach 80% of the core courses, earning 40% more per hour than part-time teachers (a6). However, when full-time teachers leave, it becomes challenging to maintain teaching quality. The core category “Faculty Management and Resource Allocation” highlights this dilemma. Full-time resources are disproportionately allocated to core subjects, leading to the discontinuation of niche courses such as guzheng and cello, which are taught by part-time teachers (a10).

(2) Pressure of scale expansion and quality control

According to statistics, the certification rate of CME teachers is only 70% (over 90% for company-owned stores), reflecting a lack of effective management during periods of rapid expansion. Selective coding of “franchisee risk transfer” (A21) reveals that the low entry threshold of 25,000 yuan has attracted non-professional investors, leading to three major issues: lowered entry standards, inconsistent teaching quality (with franchise store complaints being more than twice those of company-owned stores), and damage to brand reputation. For example, the 2023 Guangzhou store closure incident involved over 600,000 yuan in unpaid class fees, directly leading to a decline in brand trust as parents sought redress.

(3) Capability gaps in digital transformation

The integration of technology has exposed significant organizational learning deficiencies. Only 10% of teachers at CME are proficient in using the OMO system. Operational data indicates that the completion rate for online live-streamed courses was low in 2023, particularly among parents aged 35 and older, who found the platform complex to navigate. During the pandemic, 860,000 yuan was invested in purchasing equipment, yet utilization rate was less than 15%. Teachers have additional responsibilities such as video recording and online Q&A, leading to a generational digital divide and alienated middle-aged and elderly users. The market conversion rate for OMO textbooks developed in 2022 was low, reflecting a mismatch between technological investments and market demand.

7. Exploration of Stress Coping Paths

7.1 Policy Adaptation Strategy

(1) Build a bridge between government and enterprises to strive for resource inclination

The music education industry should proactively participate in sector seminars organized by educational departments, providing feedback on the practical challenges faced during policy implementation (such as the high costs of relocating and renovating small and micro franchise stores), to encourage local governments to formulate differentiated support policies. For example, Huizhou District in Guangdong Province offers a renovation subsidy of 50 yuan per square meter to institutions that pass fire safety inspections. The music store industry can advocate for the extension of this standard citywide, thereby reducing compliance pressure on franchisees.

(2) Deepen the policy compliance mechanism and develop differentiated courses

In response to the strict requirements of the “Double Reduction” policy regarding prepaid fee cycles (not exceeding three months or 60 class hours) and qualification reviews, music schools need to establish a “segmented charging + dynamic supervision” model. For example, they can split course fees into quarterly payments and manage them transparently through third-party fund custody platforms (such as the Alipay Education Payment System) to avoid risks of cash flow disruption caused by excessive concentration of funds, as seen in the closure of a store in Guangzhou. Additionally, music schools can develop innovative course systems based on policy guidance and market demand. For instance, combining music education with programming and physical acoustics to create “Music Maker Workshops,” which attract parents valuing interdisciplinary literacy; collaborating with local authorities to offer free public classes (such as senior guzheng classes and children’s music enlightenment classes), which not only aligns with policy directives but also expands brand penetration. Such courses can mitigate the risks associated with exam-oriented education and reduce development costs through government procurement or public welfare fund subsidies (such as the Cultural Welfare Project in Guangdong City), achieving a win-win situation for social and economic benefits.

7.2 Fusion with Technology and Art

Leverage modern scientific and technological means, such as virtual reality (VR), augmented reality (AR), and artificial intelligence (AI), to achieve deep integration between technology and art. Expand the boundary of artistic expression through technical means, create an immersive and interactive artistic experience, and bring unprecedented artistic enjoyment to the audience.

7.3 Resource Integration Strategy

(1) Strengthen the advantages of brand chain and enhance market competitiveness

By standardizing image output through communication, the music store can unify its VI system (such as Logo, color scheme, and slogans) across all stores. It can also create topics like “#Chunyin Art Season” on multiple platforms like TikTok and Xiaohongshu to enhance brand reputation. Additionally, by

implementing a referral system, it can launch activities such as “Refer one person and get two free classes,” leveraging existing parent social networks to attract customers at a low cost.

(2) Optimize the franchise management mode and build a risk sharing mechanism

The franchise system can be divided into two models based on investor strength: “Class A direct management stores” (the headquarters holds 50% of the shares) and “Class B entrusted stores” (the headquarters provides management support) are set up to ensure uniform teaching standards, and explore the “shared teachers” model, where the headquarters sends teachers to give lectures on tour, reducing the fixed human cost of franchise stores and expanding the path of light assets.

7.4 Operation Optimization Strategy

(1) Marketing strategy turns to the off-season and optimizes the teacher management system

Music stores can align promotional offers with school dismissal times during the off-season, introducing relevant after-school cultural and educational programs to attract students. Additionally, a “dynamic allocation mechanism + dual-track incentive system” is established. A faculty pool of “full-time core + part-time supplements” is set up, using big data analysis to assess each branch’s class hour needs (such as the surge in demand for piano teachers during winter and summer breaks). This allows for real-time allocation of part-time teachers to support operations, reducing labor waste during the off-season and lowering the cancellation rate of less popular courses. The store also implements a dual-driven approach of “performance-based pay + career advancement,” for example, part-time teachers who accumulate 500 classes can become full-time and enjoy equity incentives, thereby reducing turnover.

(2) Accelerate the implementation of OMO mode and solve the dilemma of online transformation

Optimize OMO system specialized training to enhance teachers’ digital literacy; simplify operational procedures, develop the “one-click class” function, optimize online course design and user experience, and reduce operational steps. The music store can create a technical sharing platform based on “headquarters empowerment + franchise collaboration” + blended teaching model digital ecosystem (Lyu et al., 2022). Headquarters will centrally develop an OMO teaching resource library (such as intelligent practice systems, AI notation tools), which will be freely available for use by franchisees, reducing the technical investment cost per store; promote a combination of “offline main lessons + online reinforcement,” for example, after class, push practice videos via mini-programs (with QR codes for viewing), improving completion rates.

Summary

In summary, in response to the challenges posed by the “Double Reduction” policy, Guangdong Chunyin Music Education needs to adopt a comprehensive strategy system that integrates multiple aspects, including policy adaptation, operational optimization, and resource integration, to achieve sustainable development and consolidate its leading position in the industry. Looking ahead, as the education sector continues to transform and evolve, Guangdong Chunyin Music Education must persistently explore and innovate to adapt to new market dynamics and consumer demands.

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