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POLICY-DRIVEN TRANSFORMATION IN CHINA'S ART TRAINING INDUSTRY: A CASE STUDY UNDER THE "DOUBLE REDUCTION" REFORM

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ABSTRACT

Since the launch of China's "Double Reduction" policy in 2021, off-campus academic tutoring has undergone drastic contraction, while non-academic fields – especially art education – have benefited from a new wave of policy-driven expansion. As a core component of quality-oriented education, the art training industry is experiencing both unprecedented opportunities and structural challenges. This study explores the evolving business logic of China's art training sector under the policy dividend of quality education. Employing policy analysis, industry observation, and literature review, the paper identifies a fundamental shift from exam-centric to literacy-oriented education. However, issues such as curriculum homogenization, utilitarian learning practices, and weak teacher professionalism persist. In response, the study proposes a multi-dimensional framework for industry innovation, encompassing curriculum redesign, digital integration, localized operations, and brand value enhancement. It argues that sustainable development in this sector hinges not only on regulatory relaxation but also on conceptual renewal and operational transformation. The findings offer both theoretical insights and practical guidance for education providers and policymakers aiming to align commercial models with the pedagogical essence of quality education.

KEYWORDS: *Double Reduction Policy, Art Training, Quality-Oriented Education, Business Model Innovation, Educational Governance, Education Consumption*

1. INTRODUCTION

The enactment of China's "Double Reduction" policy in July 2021 marked a watershed moment in basic education governance. Aimed at reducing students' excessive academic burden and curbing the disorderly expansion of private tutoring, the policy signaled a national shift toward more equitable and holistic educational development (Yang, 2025). Under the policy's strong regulatory measures, academic tutoring institutions were rapidly downsized or closed, while non-academic sectors—especially arts, music, and physical education—gained favorable policy space. Art education, characterized by its low exam-dependence and literacy-oriented features, emerged as a focal point for both parents and capital, benefiting from what is widely perceived as a "quality education dividend" (Zhang, 2025).

This policy-driven opportunity catalyzed rapid market expansion in the art training industry. However, rather than fostering genuine aesthetic literacy or creativity, many institutions have replicated the logic of test-oriented education within this new space. Practices such as formulaic teaching, standardized portfolios, and certification-focused outcomes have become widespread (Pei, 2023). In this context, art education risks being instrumentalized as merely another vehicle for educational competition, undermining the pedagogical essence of quality-oriented learning. While the sector flourishes in quantitative terms, it faces qualitative challenges—curriculum homogenization, inadequate teacher training, and limited innovation—raising critical questions about its long-term sustainability and educational integrity.

While prior studies have explored the policy's macro-level consequences—such as shifts in institutional structures, governance models, and the broader education market (Li & Li, 2025; Zhang et al., 2025)—few have systematically examined how non-academic institutions, particularly in the arts, are reconstructing their business logic and educational values in response to the new regulatory environment. This study addresses this gap by

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investigating the transformation of China's art training industry through the lens of policy evolution, market restructuring, and pedagogical practice. Drawing from policy analysis, case studies, and industry observation, the paper develops a framework to guide business model innovation that aligns with the goals of quality education. It ultimately seeks to offer both theoretical insights and practical strategies for sustainable development in this rapidly changing field.

2.POLICY TRANSFORMATION AND INDUSTRY BACKGROUND ANALYSIS

2.1 Institutional Logic and Strategic Intent of the "Double Reduction" Policy

The "Double Reduction" policy, introduced by China's Ministry of Education in July 2021, marked a major institutional correction aimed at alleviating systemic imbalances in basic education. The policy targeted long-standing issues such as academic overload, inequitable access, and profit-driven expansion in the private tutoring sector. It implemented measures to regulate pricing, scheduling, and capital participation in off-campus academic training, while reaffirming the public nature of education (Yang, 2025; Zhang, 2025). In doing so, the policy reoriented national education strategy from exam-driven outcomes toward more comprehensive educational equity and holistic student development (Wu, 2023). This shift carved out regulatory space for non-academic education—particularly in the arts—as an alternative channel for fulfilling the goals of quality-oriented education.

2.2 Policy Opportunities and Parental Demand for Art Education

Following the policy's implementation, non-academic training institutions gained formal legitimacy. The Guidelines for the Classification and Identification of Extracurricular Training Programs established clear distinctions between academic and non-academic programs, thereby strengthening the institutional framework supporting quality education (Wu, 2023). Art education—due to its emphasis on expression, creativity, and experiential learning—rapidly rose in popularity among parents and institutions alike. A 2023 survey revealed that 68.3% of parents selected art training as a primary extracurricular activity for their children, up from 47.2% before the policy was enacted (Yu, 2024). This shift was driven not only by institutional flexibility but also by a broader transformation in parental mindsets, from prioritizing test preparation to valuing long-term competency development (Zhu & Gong, 2023). However, the surge in market supply also brought challenges: many institutions adopted standardized, skill-centric teaching models to meet short-term demand, thus compromising pedagogical quality and misrepresenting the essence of aesthetic education (Pei, 2023).

2.3 Strategic Reorientation of Leading Institutions

Major education companies responded swiftly to the changing policy landscape by transforming their business models. New Oriental and Xueersi, formerly dominant in academic tutoring, pivoted toward interdisciplinary, literacy-oriented programming. New Oriental launched initiatives combining cultural tourism with aesthetic education—such as the "Temple of Heaven Exploration Tour"—while Xueersi rebranded as "Xueersi Literacy," emphasizing art workshops and coding programs (Zhang, Zhang, & Wu, 2025; Yu, 2024). These companies leveraged brand capital, technological infrastructure, and curricular agility to rapidly align with the new regulatory environment. In contrast, many small and mid-sized institutions lacked the resources to innovate, often defaulting to outdated, test-preparation models that conflicted with the goals of quality education. The divergent responses across institution types highlight emerging disparities in the sector's capacity for meaningful transformation.

Table 1 Business Transformation Strategies of Leading Art Training Institutions under the "Double Reduction" Policy

Institution	Transformation Strategy	Core Project	Reported Impact
New Oriental	Integration of cultural tourism and art education	Temple of Heaven Exploration Tour	$90 million in annual revenue (2024)
Xueersi Literacy[1]	Transition to interdisciplinary literacy programs	Art workshops, coding-based learning labs	300% increase in enrollment (2023)

Note. [1] Xueersi Literacy is the rebranded name of Xueersi following the Double Reduction policy. Data derived from Yu (2024); Zhang, Zhang, & Wu (2025).

Although the policy offered development opportunities, the art training sector remains uneven in its adaptation. While leading institutions have successfully navigated the transition, many smaller providers struggle with curriculum stagnation, teacher shortages, and operational inefficiencies. The sector's sustainable evolution depends not only on external policy support but also on internal restructuring of pedagogical frameworks, teacher professionalism, and value propositions aligned with quality education.

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3. THE FORMATION OF QUALITY EDUCATION DIVIDENDS AND INDUSTRY EMPOWERMENT

3.1 Policy Evolution and Conceptual Shift toward Quality Education

Since the 18th National Congress of the Communist Party of China, the national education strategy has increasingly emphasized holistic student development. The 20th Congress reaffirmed this shift by prioritizing "quality education" (素质教育), advocating for the integration of moral, intellectual, physical, aesthetic, and labor education (Liu & Huo, 2024). Key policy documents, including Education Modernization in the New Era 2035 and the Opinions on Strengthening School Aesthetic Education, formalized aesthetic literacy as an integral part of national educational goals (Cui & Huo, 2024). This conceptual evolution positioned art education not as a peripheral activity but as a strategic medium for fostering creativity, emotional intelligence, and cultural awareness.

3.2 Education Evaluation Reform and Rising Institutional Demand

The actualization of quality education largely depends on reconfiguring student assessment systems. In recent years, national and regional policies have gradually embedded artistic literacy into formal evaluation frameworks. For instance, art subjects have been included in the comprehensive quality evaluation mechanisms of junior and senior high schools, and in some provinces, contribute up to 10% of entrance exam scores (Li & Du, 2025). Meanwhile, college admission systems are evolving beyond single-score evaluations to include portfolios, creativity tests, and project-based learning assessments. These reforms signal to both parents and institutions that the development of artistic competencies now holds tangible academic value, thereby legitimizing long-term investment in off-campus art training.

3.3 Changing Parental Attitudes and Upgraded Consumption Behavior

Concurrently, parental conceptions of educational success have undergone transformation. Surveys show that an increasing number of families—particularly from the urban middle class—no longer view art training merely as a tool for academic advancement, but as a channel for nurturing creativity, emotional balance, and expressive confidence (Zhu & Gong, 2023). Parents are now more inclined to select institutions that offer experiential, culturally rich, and interdisciplinary curricula (Yang, 2023). This shift marks a broader trend in educational consumption—from functional, score-driven decision-making toward value-driven and experience-oriented preferences. As a result, training providers are compelled to elevate their pedagogical offerings, customize learning pathways, and design programs aligned with families' evolving expectations.

3.4 Policy-Driven Path Diversification and Equity Enhancement

Beyond parental demand, the diversification of institutional pathways has also empowered students with broader access to artistic development. The inclusion of art subjects in entrance exams and comprehensive evaluations provides an alternative channel for academic progression, particularly benefiting students with artistic talents or non-traditional learning profiles (Lin & Xu, 2025). Moreover, schools and institutions are increasingly collaborating to deliver hybrid models that combine formal schooling with off-campus training. This integrated ecosystem not only aligns with the goals of equitable education but also expands students' capacity to explore, express, and innovate across disciplinary boundaries.

3.5 Capital Infusion and Market Activation

The combination of favorable policy signals and rising consumer demand has attracted significant capital into the art education sector. From 2022 onward, funding for children's art, coding, and experiential learning ventures has grown rapidly, with the valuation of leading institutions rising accordingly (Zhang et al., 2025). Investment has enabled many organizations to upgrade infrastructure, develop digital platforms, and launch innovative products. However, this rapid influx has also given rise to concerns about commercial overreach. Some institutions, in pursuit of profit, exaggerate course outcomes or repurpose leisure travel as "elite research" experiences, distorting the meaning of aesthetic education (Wu, 2023). To mitigate such risks, sustainable development must be anchored in both strengthened regulatory systems and internalized ethical standards among providers.

4.Practical Dilemmas and Development Bottlenecks

4.1 Homogenized Business Models and Curriculum Convergence

Despite the surge in demand following the "Double Reduction" policy, the art training industry remains plagued by homogenized business models. Many institutions adopt similar teaching strategies—such as repetitive technical exercises, examination-oriented short courses, and certification-focused programs—that undermine the goals of holistic artistic development (Li & Du, 2025). A 2023 industry survey revealed that most training centers offer curricula based on copying, coloring, or rigid composition, with little emphasis on imagination, personal

expression, or cultural context (Pei, 2023). In order to compete for student enrollments, some providers engage in aggressive price wars, trial course gimmicks, and exam pass guarantees, which may erode trust and diminish educational quality.

4.2 Inadequate Teacher Professionalism and Institutional Instability

Teachers are central to educational quality, yet many art training centers suffer from a lack of professionally trained and pedagogically competent staff. In the wake of institutional transformations, academic tutoring instructors with limited artistic backgrounds were redeployed as art educators after minimal training (Han & Zhang, 2016). Even instructors with formal art education often adhere to outdated, technique-centered approaches that prioritize imitation over creativity. Compounding the problem is the high turnover rate of part-time and contract teachers, which leads to weak teacher-student rapport, limited instructional continuity, and inconsistent curriculum delivery (Sun, 2014). Without a structured system for teacher training, evaluation, and retention, institutions struggle to maintain educational effectiveness.

4.3 Limited Resource Integration and Innovation Fatigue

Most small and mid-sized institutions operate in isolation, with limited access to broader cultural, technological, or public education resources. Few are able to incorporate museum-based education, local cultural heritage, or interdisciplinary frameworks into their course design. Attempts to apply emerging technologies—such as AI-assisted drawing tools, VR/AR immersion, or interactive whiteboards—are often superficial and disconnected from learning objectives (Quan, He, & Fu, 2018). Curriculum development still largely depends on individual teacher experience rather than institutional research and design teams, leading to over-reliance on recycled content and a lack of pedagogical innovation.

4.4 Exam-Centric Evaluation and the Risk of Educational Instrumentalization

While quality education promotes individualized learning and process-based assessment, many training institutions continue to use outdated evaluation models. Student progress is often judged by external achievements—such as exam scores, competition awards, and certification levels—rather than creative engagement or expressive growth (Han & Zhang, 2016). This metric-driven logic distorts parental expectations and institutional behavior alike. In some cases, art education becomes another form of academic credentialing, fostering a "pseudo-quality education" model that replicates the anxieties and inequalities of the test-preparation system (Pei, 2023). As a result, students may lose intrinsic motivation and perceive art as merely another performance requirement.

4.5 Weak Educational Ethics and Regulatory Fragmentation

The commercialization of art training has also exposed vulnerabilities in ethical standards and regulatory governance. Common issues include inflated marketing claims, unverified teacher qualifications, misleading endorsements, and overpriced “elite” courses with limited educational substance (Wu, 2023). Some institutions exploit parental anxiety by promoting speculative narratives around college admissions or portfolio-based advancement. Although the 2022 Opinions on Regulating Non-Academic Extracurricular Training provided baseline requirements for teacher-student ratios, curriculum content, and institutional licensing, enforcement remains inconsistent across regions (Zhang, 2025). In the absence of a unified quality assurance system, consumer protection depends heavily on institutional self-regulation, which is often weak or absent.

5. NEW BUSINESS LOGIC AND MODEL INNOVATION PATH

5.1 Integration of Digital Technology and Teaching Scenarios

The increasing prevalence of digital platforms in education has opened new possibilities for art training institutions. By adopting Online-Merge-Offline (OMO) teaching models, institutions can enhance teaching efficiency, enable data-based student tracking, and improve parent-institution communication (Wei, 2021). Platforms offering homework uploads, digital critiques, and performance analytics allow parents to monitor student growth while fostering transparency. Advanced hardware tools such as digital drawing tablets, AI-assisted sketching software, and interactive whiteboards support multimodal learning. Some institutions have introduced VR/AR for immersive experiences and three-dimensional creation, pushing the boundaries of traditional 2D instruction (Quan, He, & Fu, 2018). While promising, the meaningful integration of such tools depends on pedagogical alignment—not technological novelty alone. Institutions must embed digital technology within curriculum objectives to achieve lasting value.

5.2 Reconstruction of Operational and Service Models

To survive in an increasingly competitive environment, art training providers must move beyond scale expansion and adopt localized, differentiated service strategies. Community-based models—such as neighborhood art

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festivals, public art interventions, and local heritage workshops—can enhance cultural relevance and social embeddedness (Jin, 2025). Institutions should also employ personalized learning data to optimize course recommendations and tailor instruction to individual development trajectories (Xie, 2023). By integrating feedback loops, after-class evaluation, and home-school collaboration tools, institutions can build long-term relationships with families and increase user loyalty. Moreover, linking classroom outcomes with public engagement—such as charity exhibitions or art fairs—not only boosts brand visibility but also reinforces the social function of aesthetic education.

5.3 Project-Based Learning and Interdisciplinary Curriculum Development

Project-based learning (PBL) offers an effective pathway for aligning art education with competency-based goals. By collaborating with schools, museums, and local artisans, institutions can develop thematic courses that emphasize real-world problem-solving, cross-disciplinary thinking, and reflective practice (Yu, 2023). For instance, integrating art with science for nature illustration, combining visual storytelling with language arts, or linking social studies with poster design encourages students to approach learning holistically. These models facilitate critical thinking, creativity, and cultural understanding—core attributes of quality education. To support this shift, institutions should invest in curriculum R&D teams, train instructors in interdisciplinary teaching methods, and assess outcomes beyond technique-based rubrics (Cui, Ju, & Huo, 2024).

5.4 Curriculum Differentiation and Brand Value Construction

To avoid commoditization, art training institutions must construct structured, multi-stage curricula tailored to children's cognitive and developmental needs. A tiered framework—such as "Enlightenment–Foundation–Advancement–Integration–Expression"—can support age-appropriate pedagogy and continuous aesthetic growth. For instance, younger learners may benefit from sensory play and parent-child collaboration, while older students may engage in interdisciplinary projects and portfolio creation. A well-designed curriculum system not only strengthens instructional coherence but also elevates brand recognition and user retention.

Table 2 Developmental Curriculum Framework for Art Training Institutions

Age Group	Curriculum Stage	Core Goals	Sample Activities	Teaching Method
3–6 years	Enlightenment	Sensory exploration, parent interaction	Color games, clay modeling, visual collage	Play-based, parent-assisted
7–12 years	Foundation & Promotion	Visual literacy, structured creativity	Drawing, sketching, art history, media experiments	Studio-based, multimedia-assisted
13+ years	Integration & Expression	Personal voice, critical thinking	Installation art, contemporary projects, curation	Mentorship, project-based learning

Note. Adapted from Guan (2017); Cui, Ju, & Huo (2024).

To reinforce curriculum differentiation, institutions should develop a consistent brand identity—encompassing course philosophy, visual communication, and instructional tone. By tracking and documenting student progress over time—through portfolios, digital records, or curated exhibitions—institutions can establish a reputation for long-term developmental value. This approach moves beyond short-term performance and fosters trust, cultural prestige, and parent loyalty (Jiang & Zhou, 2023).

6.CHALLENGES AND REFLECTIONS UNDER THE GUIDANCE OF QUALITY EDUCATION

6.1 Utilitarian Tendencies and the Risk of "Pseudo-Quality Education"

Although quality education emphasizes holistic development, many art training institutions continue to operate under test-oriented paradigms. By emphasizing awards, certifications, and exam preparation, they replicate the logic of academic competition under the label of literacy education (Pei, 2023). Marketing phrases such as "extra points for art in entrance exams" or "guaranteed admissions with portfolios" reflect a transactional mindset that reinforces parental anxiety. Students are often enrolled in multiple programs aimed at generating tangible outcomes in short periods, which undermines intrinsic motivation and reduces art learning to a strategic tool. This phenomenon constitutes a "pseudo-quality education" model that distorts the spirit of aesthetic cultivation and promotes short-termism over authentic engagement (Zhu, 2011).

6.2 Regulatory Uncertainty and Ambiguous Market Signals

While national policies provide a broad framework for non-academic training, the actual implementation of regulation remains fragmented. For instance, the 2022 Opinions on Regulating Non-Academic Extracurricular Training outlined clear requirements for institutional licensing, faculty composition, and curriculum quality, but local enforcement varies widely (Zhang, 2025). As a result, many institutions remain cautious in their strategic planning, uncertain about policy direction and compliance thresholds. The absence of unified standards also leads to inconsistent interpretations of "quality education" among schools, training centers, and parents, creating misalignments between service provision and user expectations (Ban, 2023). This policy-market disconnect fosters risk aversion and inhibits innovation, particularly among small and mid-sized providers.

6.3 Teacher Structure Instability and Ethical Gaps

Teachers are the linchpins of educational transformation, yet the art training industry suffers from high turnover, uneven qualifications, and inadequate pedagogical training. To cut costs, some institutions rely heavily on part-time or underqualified staff without formal art education or teaching credentials (Sun, 2014). Even trained instructors may adhere to narrow definitions of "good art," focusing on reproduction skills rather than emotional expression or creative inquiry (Han & Zhang, 2016). Furthermore, ethical lapses—such as ghost-painting, uncredited use of student work in marketing, or commercial appropriation of classroom outcomes—undermine educational trust and student autonomy. In the absence of a robust professional code of ethics and oversight system, such practices risk damaging the reputation and legitimacy of the entire sector (Wu, 2023).

6.4 Parental Misconceptions and Social Misunderstanding

Despite increased policy emphasis on aesthetic and emotional development, many parents still view art education through an instrumental lens. Some enroll their children merely to "earn points" or enhance resumes, while others dismiss its value entirely after early childhood (Wang, Han, Wang, & Wang, 2023). This dichotomy leads to erratic enrollment patterns and weak curricular continuity. Meanwhile, public discourse often conflates quality education with talent cultivation or extracurricular enhancement, neglecting its foundational goals of human development and social integration (Ban, 2023). These misconceptions hinder demand for sustained, process-oriented learning experiences. Without broader awareness campaigns and parental engagement strategies, the sector remains vulnerable to short-term speculation and reputational instability.

7. Conclusions and Future Prospects

The introduction of China's "Double Reduction" policy represents a watershed moment in the transformation of basic education—from a test-driven, capital-intensive model to a more holistic, literacy-oriented framework. In this new context, the art training industry has benefited from policy incentives and evolving parental expectations, emerging as a strategic site for delivering quality education. However, the expansion of this sector has revealed a range of structural contradictions. Institutions face tensions between commercial imperatives and educational integrity, while stakeholders struggle to define and align with the evolving meaning of "quality education."

This study has examined how policy reorientation, market restructuring, and pedagogical innovation intersect in the transformation of China's art training industry. It finds that although institutions have actively responded through curriculum redesign, digital platform development, and brand repositioning, the persistence of exam-oriented practices and short-termism continues to undermine the sector's developmental potential (Pei, 2023; Wu, 2023). While leading providers have the capacity to pivot, most small and mid-sized institutions remain trapped in outdated business models, weak operational systems, and ambiguous value propositions. Without meaningful reform, the industry risks reentering the cycle of instrumentalized education under a different name.

Moving forward, three key strategies are necessary to promote sustainable development. First, art training institutions must return to the educational essence by placing student growth, creativity, and emotional well-being at the core of their pedagogical models. Second, systematic capacity-building—including teacher training, curriculum research, and digital infrastructure—is needed to support quality delivery and long-term differentiation. Third, multi-stakeholder collaboration involving families, schools, communities, and regulators is essential to create an ecosystem that aligns market practices with educational values.

At the policy level, continued refinement of regulatory mechanisms for non-academic training is required. This includes clarifying standards, enhancing regional consistency, and fostering transparency in institutional evaluation. Simultaneously, public discourse must move beyond a results-oriented mindset to embrace a broader understanding of education as a lifelong, developmental process. Only through conceptual renewal, institutional innovation, and social engagement can art education fulfill its potential in shaping culturally grounded, aesthetically aware, and emotionally resilient citizens.

In sum, the transformation of the art training industry under the "Double Reduction" policy is not merely a matter of compliance, but a deeper challenge of redefining the purpose of education in an increasingly competitive and uncertain world. By anchoring future development in the principles of equity, ethics, and educational integrity, the sector can evolve from a policy beneficiary to a key driver of quality education in the post-reform era.

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