

Analysis on the Influence of Commercial Performance Policy on the Development of Music Culture Industry

—Take Guangzhou Gymnasium as an example

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Abstract: The development of China's music industry has experienced the stages of start-up period, vigorous development period, bottleneck period, and industrial chain remodeling period. At present, with the support of national policies, China's music industry has achieved new development. This paper sorts out the stage of the development of China's cultural and cultural industries, and analyzes the development of China's cultural industry classification in recent years. At the same time, taking Guangzhou Sports Tube as an example, it empirically analyzes the influence of national and local policies on restricting music commercial performance on the development of China's music industry.

1. The development stage of China's music culture industry

After the reform and opening up, China's music industry has experienced a period of start-up, booming period, bottleneck period, and industrial chain reshaping. So far, it has successfully launched a new pattern of "music +" industry development. The high degree of integration and development has brought new opportunities for China's music industry to create brilliant achievements again. After China's economic development enters a new normal, the music industry, as a creative industry, plays a very important role in the development of China's economic operation from investment-driven to innovation-driven new socialist economic development model. According to the development stage, the development of China's cultural industry can be divided into four periods.

The first period was the beginning of the music industry. The time period is from 1978 to 1985. Thanks to China's reform and opening up, some publishing units and production companies have begun to try to produce popular songs in Hong Kong and Taiwan. At this time, music production, publishing, and distribution formed the primary mode of the music industry, which also laid the foundation for the future development of China's music industry.

The second period is the period of booming music industry and original music. The time period is from the end of the 85th year to the end of the last century. During this period, a large number of singers and excellent singers who are still active on the stage have been produced, and many outstanding composers and original musicians have been produced. They have created a large number of outstanding original music works that have stood the test of time.

The third period is the bottleneck period of the music industry. The time period is from 2003 to 2009. Since 2003, digital technology has developed rapidly, digital music has become popular, and the change in music listening habits has greatly impacted the distribution channels of music works based on physical record distribution. The development of China's music industry has encountered an unprecedented development dilemma and entered a bottleneck period that needs to be broken.

The fourth period is the reshaping period for the music industry. The time period is from 2009 to 2014. The State Administration of Press, Publication, Radio, Film and Television has paid attention to the dilemma of the development of the music industry. In order to change the status quo, the General Administration has established 12 music industry bases in Beijing, Guangdong, Shanghai and Sichuan. Through policy guidance and support, the music enterprises will be gathered to open a closed loop between the various links of the music industry, and establish a new music industry

chain that adapts to the development of the digital age.

2. The analysis of the development of China's music industry

With the implementation of the strategy of building a strong socialist country in China, the important position of the music industry in the cultural industry is widely recognized. In 2016, the added value of China's cultural industry exceeded 3 trillion yuan for the first time, playing an important role in improving the quality and efficiency of the growth of the national economy. In particular, the music industry, as a creative industry, plays a very important role in China's new socialist economic development model. The "Music+" integration format has become a new kinetic energy for development. "Integration, Reconstruction, and Renaissance" constitute the main theme of the development of China's music industry. According to the "2016 China Music Industry Development Report", the total output value of China's music industry reached 301.8 billion yuan in 2015, an increase of 11.2% compared with the total output value of 270 billion in 2013. This fully demonstrates that China's music industry has become a domestic cultural sector to stimulate domestic demand. One of the important industries that promote employment, promote national economic growth and transform and upgrade.

2.1 Analysis of the development of China's music market in 2016

According to the 10 categories of music books, music performances, music economy, digital music, etc., we can find that the added value of China's music industry in 2016 is as follows:

2.1.1 Music performance industry

In 2016, the music performance market grew rapidly, with an overall scale of 16 billion yuan, a year-on-year increase of 6.7%. The total box office revenue was about 4.813 billion yuan, of which the theater music show box office revenue was about 1.227 billion yuan, the concert box office revenue was about 3.021 billion yuan, the music festival box office revenue was about 481 million yuan, and the livehouse box office revenue was 82.85 million yuan. The performances of the performances, the number of performances, and the attendance rate all rebounded. The marketization, industrialization and internationalization of the performance industry have further improved.

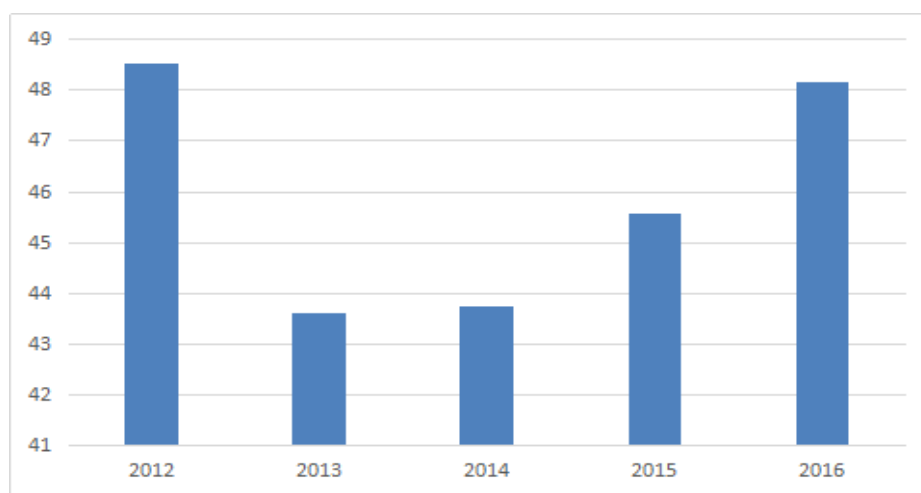


Fig1 Comparison of box office sales of Chinese music performance market in 2012-2016

2.1.2 Digital music

In 2016, the industry scale of digital music in China reached 52.926 billion, an increase of 6.2% year-on-year. The total output value of PC and mobile terminals reached 14.326 billion yuan, a year-on-year increase of 39.36%. The value-added value of telecom music value-added services was about 38.66 billion yuan, down 3% year-on-year. However, the multi-media profit business of new 4G music and the diversified profit model of digital music platform became the highlight of the

year.

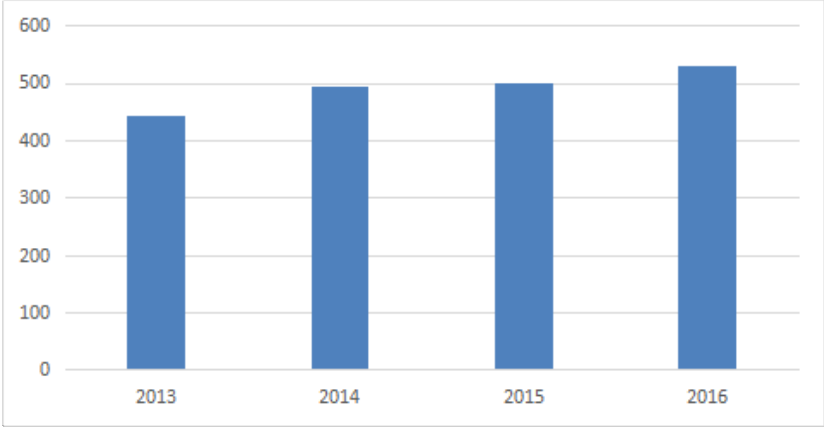


Fig2 Comparison of China's digital music industry market scale and growth rate from 2012 to 2016

2.1.3 Radio and TV music

In 2016, the music broadcasting advertising fee was about 1.527 billion yuan, a year-on-year increase of 2.1%. In 2016, the music TV variety show and video website homemade music variety show continued to be active. The total advertising revenue of TV music variety shows exceeded 4.6 billion yuan, a year-on-year increase of 53.4%.

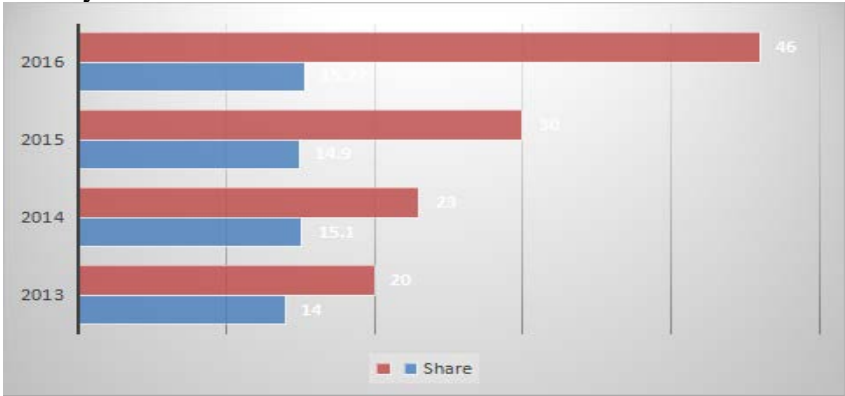


Fig3 Comparison of Radio and TV Advertising Revenues from 2013 to 2016

2.2 Market consumption development

In 2016, the total size of China's music industry was about 325.322 billion yuan, a year-on-year increase of 7.79% compared with 2015. The year-on-year growth rate was 1.09% higher than the GDP growth rate during the same period. The data shows that the new kinetic energy represented by the digital music industry has become the main driving force for the overall rapid growth of the Chinese music industry.

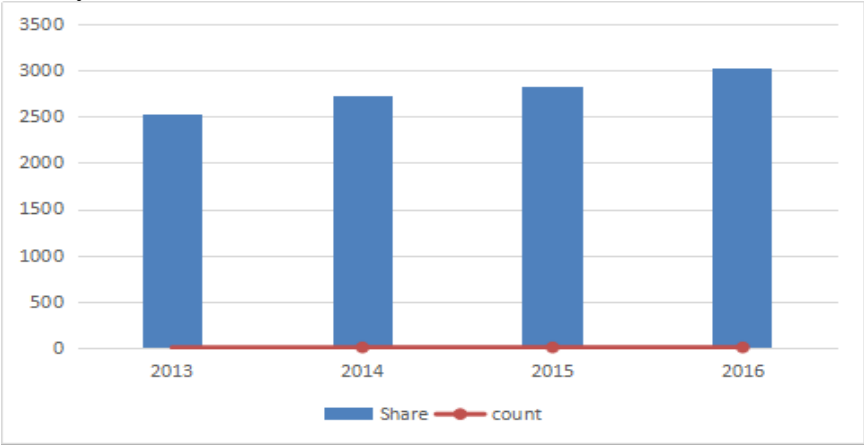


Fig4 Comparison of the annual market size of China's music industry from 2012 to 2016

From the point of view of the offline consumer market, the music performance market continued to be active in 2016. The performances of the show, the total box office revenue and the number of performances reached a record high, and achieved rapid growth year-on-year. From the perspective of online consumer market, Internet music users accounted for 68.8% of the total Internet users in 2016, and the user scale reached 503 million, an increase of 0.1% over the same period of the previous year. The growth rate has slowed down.

3. The impact of policy on business performance

As an important manifestation of the development of the music industry, commercial performance is an important support for the growth of the music industry. The support of national policies for commercial performances, as well as the current active music market, have provided a good development environment for Chinese music business performances.

3.1 National policies promote the rapid development of the music industry

"Several Opinions on Promoting the Development of China's Music Industry" boosts the development of China's music industry into a fast track of normative and benign sustainable development. The "Outline of the National Cultural Reform Plan for the 13th Five-Year Plan" points out the goals and direction of the sound development of the "music industry." In particular, the "Several Opinions on Accelerating the Development of Sports Industry to Promote Sports Consumption" proposes that a sports

industry system with reasonable layout, complete functions and complete categories should be basically established. As an important link in the sports culture industry chain, music business performance is an important way to implement the integration of commercial and commercial industries. The "Several Opinions" also mentioned that it is necessary to comprehensively clean up relevant regulations that are not conducive to the development of the sports industry, and to cancel unreasonable administrative examination and approval matters. All areas where laws and regulations are not explicitly prohibited must be open to the public.

	2013		2014		2015		2016		2017		total	
	Number of activities		Number of activities		Number of activities		Number of activities		Number of activities			
	Quantity	Session	Quantity	Session	Quantity	Session	Quantity	Session	Quantity	Session	Quantity	Session
Show	32	33	31	33	47	62	51	45	51	52	212	225
Exhibition	8	21	7	17	7	17	6	16	14	31	42	102
Conference	3	3	4	4	3	3	2	2	1	1	13	13
Car seminar	9	25	8	17	2	5	2	2	2	12	23	61
Sports event	38	49	48	58	41	61	47	75	35	73	209	316
Total	90	131	98	129	100	148	108	140	103	169	499	717

Fig5 Guangzhou Gymnasium held activities statistics

3.2 The policy limits the development of the commercial performance market

As an important music industry in China, Guangzhou takes Guangzhou Stadium as an example to analyze the important influence of policies on the performance market of China's commercial performances. Zhujiang Culture and Sports Industry Co., Ltd. has created a model for the management of sports venues by enterprises, and is the main body of construction and operation of Guangzhou Gymnasium.

In the middle of 2017, in consideration of strict consideration of the safety evacuation of the audience, the Guangzhou Municipal Public Security Bureau issued the stipulation that "the large-scale event can not set up an audience in the infield". This policy is the first in the country and is the only local city to date. This policy has a great impact on the Guangzhou music commercial

performance market.

3.2.1 The number of performances in multiple venues has dropped sharply

Guangzhou Stadium. In the first half of 2017, the Guangzhou Gymnasium held a total of 21 large-scale events, and after the “instructions for not allowing the audience to be set up in the infield”, it was estimated from the current contract signing that only 9 events could be held in the first half of 2018, down from the same period of last year. 66%. Guangzhou Asian Games City Comprehensive Gymnasium. Affected by the new regulations, the Guangzhou Asian Games City Sports Complex has been forced to cancel performance contracts for at least 9 large-scale events since the second half of last year. The operator's losses have reached 2.68 million yuan.

3.2.2 The new policy restricts the performance of the performing arts project in Guangzhou

In the process of implementing the regulations, it was found that there was no difficulty in hosting the large-scale activities in the audience. It was a great impact on the large-scale performances held by the Guangzhou performing arts units represented by the Guangzhou Gymnasium. According to statistics, in the first half of 2017, there were 14 large-scale concert projects of over 5,000 people in Guangzhou. After the new policy, there were only 6 games in the first half of 2018 (including 4 in the Guangzhou Stadium), and the number has been greatly reduced. This regulation will not only have a huge impact on the Guangzhou concert market, but also adversely affect large-scale corporate evenings, large-scale conferences and large-scale sports competitions.

4. Conclusion

The policy has two sides. If it is in line with reality and implemented properly, it will play a decisive role in promoting industrial development. However, market entities have their own development regularity, and any decision-making and policy formulation should fully consider the actual situation. If there is not enough research, or just to save management costs, some policies are introduced, which are not only inconsistent with the direction of national reform, but also will dampen the enthusiasm of market participants and have a negative impact on China's industrial development. I hope that through the analysis of this article, it can bring some thoughts and enlightenment.

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