Jazz Education in Contemporary Shanghai:
Informal Learning and Identity Status Among Secondary Students

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Abstract

Since the early twentieth century, Shanghai has sustained a vibrant jazz ecosystem that continues to shape school music education and young people's perceptions of musical identities. Although many papers indicate that popular music pedagogy is not encouraged in Chinese schools, a year of involvement in an international school in Shanghai revealed abundant popular music activities—especially in jazz—offered informally within the school context. This study aims to examine how integrating informal jazz learning into a formal international school context in Shanghai influences equitable access, participation, recognition, outcomes, and students' musical identity exploration and commitment. Grounded in Erikson's psychosocial theory and Marcia's identity status model, this mixed-methods case study combined year-long observations of school jazz activities with semi-structured interviews with 10 participants aged 16–25 (current students and recent alumni, including school jazz band members, self-identified jazz enthusiasts, and students pursuing jazz degrees in the United States). I analyzed the roles of digital learning, peer learning, and assessment practices in facilitating or constraining engagement and identity work. Findings indicate that informal strategies broadened entry into jazz and supported musical identity exploration; however, limited assessments and uneven recognition from parents and the broader community constrained identity consolidation and access to high-status opportunities. This work addresses a research gap in secondary-school jazz education in Chinese context and has implications for the design of more equitable, identity-affirming music programs.

Keywords: informal learning, musical identity, jazz music education, educational equity, secondary schools

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Introduction

Debates on Informal–Formal Learning in Jazz Pedagogy

Informal learning has long been recognized as a central component of jazz education, where musicians traditionally develop their skills through listening, imitation, experimentation, and active participation in peer-based communities, such as jam sessions and ensembles (Berliner, 2009). Green's (2006) model of informal music learning, derived from the practices of popular musicians, outlines key features that distinguish it from formal music education. These features include learner-selected repertoire, ear-based learning, peer-directed group work, non-linear progression, and a teacher role focused on facilitation rather than direct instruction. Empirical studies across various educational systems suggest that integrating informal learning strategies into formal educational contexts can significantly enhance student motivation, agency, and engagement (de Bruin, 2022; Hewitt, 2018; Mariguddi, 2022; Virkkula, 2016). This fusion of informal and formal learning has been shown to benefit students' creative expression and collaboration (Wright & Kanellopoulos, 2010).

While Green's model of informal music learning has been widely acknowledged, its applicability to jazz education remains a topic of ongoing debate. Green's original research focused primarily on adult white rock musicians, which has led critics to question whether the model's emphasis on popular music is equally effective for jazz, a genre with distinct social and musical practices (Wright & Kanellopoulos, 2010). Additionally, integrating informal learning strategies into jazz education faces challenges, as sustained jazz learning typically requires formal engagement with knowledge, particularly in areas such as music theory and harmony (Virkkula, 2016). In light of these challenges, recent scholars have moved away from the binary distinction between informal and formal learning, instead conceptualizing them as overlapping and mutually reinforcing domains (Hess, 2020; Storsve, 2024). This shift suggests that while informal engagement can ignite initial interest and participation, a balanced approach that incorporates formal knowledge is crucial for sustained and comprehensive jazz education.

Adolescence and the Underrepresentation of High School Jazz Music Education

Alongside these debates, gender disparities in jazz education remain a persistent issue. Female students often report lower confidence and greater anxiety, particularly in jazz improvisation, compared to their male counterparts (Coss, 2018). This gendered experience highlights the intersection of music education and identity formation, an area that has received increasing attention. According to Erikson's (1968) psychosocial theory, adolescence is a crucial stage of identity development, characterized by a struggle between identity formation and role confusion. Frith (2013) further emphasizes that music serves as a social practice through which identities are constructed and recognized. These theories suggest that jazz education, as a social and musical practice, plays a significant role in adolescent identity exploration and commitment.

While existing research on jazz education has predominantly focused on primary school contexts, teacher education, and professional music colleges, there has been limited attention to high school students. This gap is notable because the high school years represent a critical stage for students aspiring to pursue jazz at the university level, where formal knowledge and technical skills are increasingly emphasized. The study of music education in adolescence reveals the importance of identity formation during this period, with students' musical self-

concepts shaped by their educational experiences. Thus, high school is an essential period for exploring how informal and formal jazz learning experiences influence students' musical identities.

Jazz Education in China: Historical and Curricular Contexts

In the Chinese context, jazz has a relatively short history as a formal subject of study. While jazz entered Shanghai's urban popular culture in the 1920s, initially as entertainment for the middle and upper classes (Marlow, 2018), formalized jazz education did not emerge until the early 2000s. Institutions such as the Shanghai Conservatory and JZ School played a crucial role in developing specialized jazz programs. Earlier studies suggested that jazz remained marginal within Chinese secondary school curricula, despite significant student engagement with global popular music cultures (Ho, 2014; Law & Ho, 2015). School music programs in China have traditionally prioritized Western classical and traditional Chinese music, leaving little room for jazz.

However, recent observations suggest a shift in this dynamic. In cities like Shanghai, jazz is now receiving greater institutional support within secondary schools, reflecting a changing educational landscape. The increased exposure to digital music cultures among students has further complicated the divide between classical and popular music in educational contexts. While this change is promising, previous studies, conducted a decade ago, indicated that jazz still faced challenges in the secondary school curriculum. Nevertheless, the present study reveals that jazz is becoming more visibly valued in school-based learning, signaling a need to reassess how jazz is taught and supported within Chinese educational systems.

Research Questions

This study aims to address the following research questions: What informal jazz learning mechanisms are present in this school context? How do these mechanisms enable or constrain students' access to jazz learning and jazz communities? How do students interpret their jazz learning experiences in relation to their musical identity development? These questions are critical in understanding how the intersection of informal and formal learning influences students' engagement with jazz and their development as musicians.

Methodology

Research Design

This study adopted a qualitative research design to investigate informal jazz music learning practices in the secondary school context and their influence on students' perceptions of musical identity. The qualitative approach was considered appropriate because the research sought to explore students' music learning experiences, meanings, expectations, and interpretations of informal learning rather than to measure predefined outcomes. More specifically, this study employed a deductive thematic analysis framework, guided by existing theories, such as informal learning strategies (Green, 2002), identity status (Marcia, 1980), and social recognition in education. This deductive orientation enabled a critical examination of how empirical data aligned with, extended, or challenged established theoretical perspectives.

Settings and Participants

The study was conducted at an international secondary school operating under an American education system. The school offered a diverse music program that included elective courses in music composition, performance, music history, and music technology. In addition to school-based offerings, students were encouraged to pursue external credentials and assessments, such as Advanced Placement Music examinations and online certificates from American institutions, including Berklee College of Music and Harvard Graduate School of Education, especially for those who would like to pursue a bachelor of music degree in the future. The school holds a concert every month to allow students to showcase their latest musical works. The school setting provided a rich site for examining informal learning, as students engaged with jazz across multiple contexts, including formal lessons, extracurricular activities, peer-organized ensembles, and online learning platforms.

Participants included seven male students and three female students who are interested in jazz music from Grade 9 to Grade 12, as well as recent alumni who had graduated from the school and were currently studying music at universities in the United States. The semi-structured interviews aimed to gain perspectives on how high school informal learning experiences influenced musical identity development beyond graduation. Participants were selected through purposive sampling to ensure that they had direct experience with jazz-related learning activities, such as participation in school jazz bands, music clubs, concerts, or external jazz learning programs.

Data Collection

Data were collected through non-participant observations and semi-structured interviews to enhance credibility through triangulation. Observations took place in formal music lessons, after-school clubs, jazz ensemble rehearsals, and performance sessions, focusing on learning behaviors, peer interactions, and informal learning strategies like collaboration, self-directed practice, and improvisation. Interviews asked participants to reflect on campus activities, peer learning experiences, engagement with digital platforms, and future plans. Alumni were prompted to connect past learning with current aspirations and musical identity. Interviews were audio-recorded with consent, transcribed, and integrated with field notes for analysis. Participants were provided anonymity and are identified by participant numbers (P1, P2, etc.).

Data were analyzed using a deductive thematic approach (Braun & Clarke, 2006), guided by theories of informal music learning (Green, 2002, 2017), sociocultural learning (Vygotsky, 1978), and identity development (Erikson, 1968; Marcia, 1980). These frameworks served as sensitizing concepts, directing attention to how learning was structured and valued within the school context. The analysis proceeded in stages, starting with familiarization with the data through repeated readings. Initial coding focused on learning activities, peer interactions, and affective responses. Codes were then reorganized to identify mechanisms shaping access to jazz learning, participation, recognition, and identity. Finally, themes were constructed by grouping related mechanisms, which were refined through iterative comparison across participants and data sources.

Findings

Theme 1: From Informal Practice to Formal Knowledge

In jazz education, learning licks (see Figure 1) is traditionally rooted in informal learning practices such as listening, imitation, and repetition. Students are encouraged to learn these licks by ear from recordings of iconic jazz musicians like Charlie Parker, Dizzy Gillespie, and Bud Powell, reflecting an aural-first pedagogical approach in which sound precedes notation (Berliner, 2009). However, students reported challenges in applying learned licks to live performances, particularly when the harmonic structure changes.

"When I practise, I feel like I need to learn more music theory" (Participant 2, interview, 2024).

"I don't really know how to use licks when I'm playing" (P7, interview, 2024).

As students progressed, many began to recognize the necessity of music theory for their musical development. This recognition marked a shift from purely informal engagement toward a greater acceptance of formal learning. However, some students struggled with this transition:

"Music theory is too complicated for me" (P6, interview, 2024).

It reflected the challenges many face when confronted with the complexities of formal theory in the context of jazz.

Figure 1
Short ii-V-I Jazz Lick

Theme 2: Digital Learning and Expanded Access

Many students come into contact with jazz music because of performances in jazz clubs, which are popular in Shanghai, and recommendations from instrument teachers outside the school, but they have no sense of participation.

"I haven't actually practiced improvisation. I just like the vibe of the JZ club" (P1, interview, 2024).

"JZ club has a jam session every Sunday evening, but I never go on the stage" (P4 & 5, interview, 2024).

While the formal music curriculum in school is often confined to classical genres and the syllabus set by the teachers, online platforms have provided students with a wider range of music genres, which fills a gap in their school music education. One prominent example of this is the online music courses offered by Berklee College of Music. These courses cover a wide array of jazz music topics, including music theory, composition, and arrangement. The courses provide a certificate upon completion, offering secondary students a valuable credential that could be used to earn university credits if they decide to pursue a related major in the future. Some students expressed pride in receiving the Berklee certificate, seeing it as a significant achievement.

"I'm the only middle school student in the class. The other students are either adults or postgraduates" (P2, interview, 2024).

"I have completed three courses, which many professional jazz musicians may not have learned" (P7, interview, 2024).

However, the cost of these courses was a point of concern even among students from middle class or upper class, as their parents questioned whether the investment was worthwhile.

"I didn't register because it's quite expensive. My father is not willing to pay. Actually, similar teaching videos can also be found on YouTube and Bilibili" (P3, interview, 2024).

"I feel it won't be of much use to my improvisation. I won't sign up for other courses. They are very expensive" (P5, interview, 2024).

Theme 3: Teacher Mediation and Competency Limits

In the context of jazz music learning, teachers primarily played a mediating role in supporting students' exploration of musical identity and helping them manage academic responsibilities, rather than directly teaching jazz. Teachers did not dictate specific genres for students to study, but instead guided them toward external learning resources, such as the Berklee online jazz courses, provided feedback on assignments, and monitored progress in performance and theory.

Many students emphasized that teacher support was crucial for navigating both academic expectations and informal learning pathways. One student described this supportive relationship:

"He always reminds me about deadlines, and if I don't understand something in the online tasks, I go to him for help. He has a PhD in music, and with his help I got As last semester" (P8 & 10, interview, 2024).

"Whenever I didn't finish an assignment, my mom was informed immediately, and it felt awful" (P9, interview, 2024).

This illustrates how teacher mediation involved a combination of academic supervision and individualized guidance, helping students sustain engagement with jazz alongside formal

schooling. However, students recognized clear limitations in this support, largely shaped by teachers' professional backgrounds. Most teachers were trained in classical music and lacked specialized expertise in jazz beyond basic theory and historical knowledge.

Because of these competency limits, students' primary engagement with jazz occurred outside formal classroom instruction—through online platforms, external instrumental teachers, peer networks, and community music spaces. While teachers shared resources on jazz history and repertoire, students assumed increasing responsibility for directing their own learning:

"I've learned more about jazz music from my friends and outside music clubs than I have in school. My music instrument teacher outside of school also recommends great resources" (P4, interview, 2024).

This lack of recognition from both the school system and families complicated students' efforts to consolidate their jazz identities. While teacher mediation and informal learning strategies broadened access to jazz and supported identity exploration, limited assessment mechanisms and uneven recognition constrained students' ability to translate these experiences into stable, institutionally valued musical identities or access higher-status opportunities.

Theme 4: Peer Learning and Participatory Jazz Culture

Peer learning played an essential role in the students' engagement with jazz music, especially given the collaborative nature of jazz performance. Students considered they could find group members eaiser in school, even they do not share the same music tastes. Sometimes they joined in and feel a sense of belonging.

> Before transferring here, I never listened to jazz music. I like pop music and wanted to become a pop singer. But after playing jazz with my friends, I realized it's a whole different level. Jazz is advanced—it requires a deeper understanding of music theory and improvisation. I think it's cooler. (P6, interview, 2024)

Through the academic year, there were totally twelve jazz music bands, with four to seven members for each band. Some students participated in more than one band, while some joined on a one-off basis and quickly left. This peer-based system often led to challenges. Since most of the bands were self-organized and lacked formal constraints, the student groups were fluid and often experienced frequent changes in membership. Additionally, female students reported difficulty developing a sense of belonging in peer groups that were predominantly male.

"I have changed three bands at school, and each time they ended up with arguing" (P3, interview, 2024).

"All members in the band is boys. I just don't want to deal with them" (P9, interview, 2024).

Theme 5: Assessment

In this school, the formal assessment mechanisms—such as grading, feedback on assignments, and performance evaluations—were primarily rooted in the school's classical

music curriculum and did not adequately address the informal, explorative nature of jazz learning. As a result, students' interactions with jazz music were often perceived as peripheral to the formal educational structure, and the recognition of their jazz learning was inconsistent. While the school offered opportunities for students to participate in band and many practice activities, these formal avenues were often seen as separate from the everyday learning that took place in informal settings.

"We do a lot of jazz band rehearsals and performances, but none of that really counts at school. It's just for fun, and my GPA is still pretty low" (P2, interview, 2024).

"I think going to concerts should count toward our GPA, but that's just not how the system works" (P3, interview, 2024).

The absence of formal recognition through grades or academic credits led some students to question the legitimacy of their jazz pursuits, even when they were deeply engaged in the music.

However, the potential of alternative forms of assessment, such as digital badges and peer-based evaluations was uncovered. Regular performances also offered social recognition, with some students gaining reputation among peers.

"I am the number one drummer in our school" (P2, interview, 2024).

Theme 6: Identity Exploration and Social Expectations

Participants demonstrated varied stages of musical identity development, with most students situated in the "Moratorium" status (Marcia, 1980). These students were actively exploring jazz as part of their musical identities but had not yet made firm commitments regarding their future involvement in the genre. This exploratory phase was often marked by uncertainty, particularly due to limited access to formal jazz education, unclear professional pathways, and uneven recognition from families and the broader community. Some students occupied the "Foreclosure" status, having committed to jazz without extensive exploration of alternatives. These commitments were frequently shaped by external pressures, including parental expectations and pragmatic considerations about career stability.

> I've been playing jazz for years, but I never really thought about what it means for my future. My parents always wanted me to study something "stable," like business. Sometimes I feel like I'm stuck between following my passion for jazz and meeting their expectations. (P5, interview, 2024)

"My mom doesn't really understand why I'm into jazz. She wants me to focus on classical music" (P10, interview, 2024).

"Jazz musicians earn very little money" (P1, interview, 2024).

Gender further shaped these identity processes. Female students, in particular, described additional challenges in pursuing jazz, a genre historically dominated by male musicians.

"I think women are not very good at music composition and improvisation" (P9, interview, 2024).

"It seems that all the jazz players are boys, while girls can only sing" (P10, interview, 2024)

These pressures heightened uncertainty during identity exploration and made long-term commitment to jazz more difficult, especially for female students.

Discussion

Informal Learning and the Necessity of Music Theory

Students' engagement with jazz in this study typically began through informal learning strategies such as listening, imitation, repetition, and peer-based experimentation, particularly through learning licks and improvisation by ear, aligning with Green's (2002, 2017) model of informal music learning and recent research showing that such approaches enhance motivation and engagement in jazz education (Berliner, 2009; de Bruin, 2022; Virkkula, 2016). However, this study extends Green's framework by demonstrating that music theory learning is not optional in jazz, but essential for sustained participation, especially in ensemble contexts where harmonic understanding and stylistic knowledge are required. Consistent with recent scholarship that conceptualizes jazz learning along a continuum between informal and formal learning (Hess, 2020; Storsve, 2024), students reported reaching a point where informal practice alone was insufficient.

An extended discussion that arises in the study is that this transition to formal theoretical knowledge often occurred without systematic instructional support, as jazz theory was rarely taught explicitly in formal classes. Many students experienced theory as difficult and discouraging when learned independently, which undermined confidence and, in several cases, discouraged them from pursuing jazz or music degrees despite strong initial interest. These findings complicate celebratory accounts of informal learning by highlighting how insufficiently supported theory learning can constrain students' long-term musical pathways, suggesting that informal jazz learning in secondary schools must be complemented by explicit and supported theory instruction to function equitably.

Digital Learning as Expanded but Unequal Access

Digital learning platforms—particularly online jazz courses and open media resources—played a crucial role in broadening students' access to jazz knowledge beyond the school curriculum. These platforms offered structured content, exposure to professional standards, and, importantly, formal certificates, which students perceived as valuable cultural capital. In this sense, digital learning aligns with Green's informal principles by enabling self-directed, interest-driven learning, while also introducing new forms of formalization.

However, access to digital learning was uneven. Financial cost, parental approval, and differing perceptions of value shaped who could participate fully. This finding challenges optimistic assumptions that digital learning inherently democratizes music education. Instead, digital platforms may reproduce existing inequities, privileging students with greater economic and familial support.

Teacher Mediation Beyond Technique

Teachers played a significant, though indirect, role in students' jazz learning. Most teachers lacked specialist jazz expertise and did not teach improvisational techniques in depth.

Nevertheless, their contribution was essential in three ways: resource provision, emotional and academic support, and monitoring and legitimation. Teachers guided students toward external learning opportunities, helped them manage academic workloads, and facilitated performance opportunities within school concerts.

This mediating role aligns with sociocultural perspectives on teaching as scaffolding rather than transmission. Teachers functioned as brokers between informal learning and formal schooling, enabling students to sustain engagement with jazz despite curricular constraints. However, reliance on individual teacher support also created inconsistencies, as students' opportunities depended heavily on teacher attitudes and capacity. The findings highlight the need to reconceptualize teachers' roles in jazz education—not as sole technical authorities, but as institutional facilitators who connect informal learning with recognition and support.

Peer Learning: Opportunity and Instability

Peer learning emerged as one of the most influential mechanisms shaping students' engagement with jazz. Student-led bands and rehearsals functioned as informal communities of practice, where musical knowledge, norms, and identities were negotiated socially. Peer influence often motivated students to try jazz for the first time, even when it was not their preferred genre, demonstrating the powerful role of social belonging in musical decision-making.

At the same time, the absence of formal structures—such as clear leadership, assessment criteria, or long-term goals—made peer learning fragile. Groups frequently dissolved due to conflict, uneven skill levels, or competition for status. Without assessment or institutional constraints, practice was sometimes inefficient, exclusionary, or unstable. These findings complicate celebratory accounts of peer learning by showing that informality without support can undermine continuity and equity. Gender dynamics further intensified these challenges, as female students reported difficulty entering and remaining in male-dominated jazz groups, an issue that informal structures alone struggled to address.

Assessment and Recognition

Assessment emerged as a critical site of tension. Students expressed pride and motivation when performing for audiences, and public performance functioned as a powerful form of recognition. However, the exclusion of jazz performances and ensemble work from formal grading systems led to frustration and devaluation. Students questioned the legitimacy of their jazz learning when it carried no academic weight, despite significant time and effort invested.

Green (2017) argued that informal learning resists traditional assessment frameworks and that over-assessment risks undermining intrinsic motivation. This study both supports and challenges that claim. While students valued the freedom of informal learning, they also desired assessment that acknowledged their work, particularly in the educational context which is necessary for university application. Alternative assessments—such as performance-based evaluation, portfolio assessment, digital badges, and peer assessment—may offer ways to recognize informal learning without imposing rigid formalism. The findings suggest that equitable music education requires not less assessment, but more appropriate forms of assessment that validate diverse learning pathways.

Identity Exploration Without Consolidation

Identity emerged as the most consequential theme. Most students occupied a Moratorium status, actively exploring jazz but unable to commit due to uncertainty about future pathways, lack of institutional recognition, and parental resistance. Even when jazz functioned as a meaningful hobby, it rarely supported identity consolidation. Informal learning enabled exploration but did not provide sufficient stability for long-term commitment.

Parental expectations and gender norms further constrained identity development. Jazz was often viewed by parents as economically risky or culturally less legitimate than classical music, limiting emotional and financial support. Female students faced additional barriers in peer communities and internalized doubts about belonging. Only a small number of students achieved identity consolidation, typically those with access to supportive families.

Conclusions

This study examines the integration of informal and formal jazz learning in a secondary school context in Shanghai, highlighting both opportunities and challenges. Informal learning strategies, such as peer collaboration and digital platforms, were key to fostering student engagement and identity exploration. However, the lack of formal instruction in areas like music theory hindered students' ability to fully apply their informal learning. While teachers played a vital mediating role, their limited expertise in jazz and the absence of dedicated jazz curricula left gaps in students' education. Peer learning was crucial but often unstable, and the lack of formal recognition of jazz learning within the school system created frustration. Gender dynamics also emerged as a barrier, with female students facing additional challenges in predominantly male jazz groups and experiencing greater difficulty in developing a sense of belonging. Furthermore, family expectations were a significant factor in shaping students' musical identities. Many students reported that their parents prioritized more traditional and financially stable career paths, such as classical music or business, over jazz, which was often perceived as a less viable career option. This pressure created conflicts between pursuing personal passions for jazz and meeting parental expectations, leading to uncertainty in their identity development. The findings suggest that a more balanced approach combining informal learning with formal theory instruction, gender-inclusive support, family engagement, and appropriate recognition is necessary for equitable and sustainable jazz education in secondary schools.

Acknowledgements

Declaration of Conflicting Interests

The author declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Declaration of Generative AI and AI-Assisted Technologies in the Writing Process

The author declares that Grammarly, an AI-assisted writing software, was used in proofreading and refining the language used in the manuscript. The usage was limited to

correcting grammatical and spelling errors and rephrasing statements for accuracy and clarity. The author further declares that, apart from Grammarly, no other AI or AI-assisted technologies have been used to generate content in writing the manuscript. The ideas, design, procedures, findings, analyses, and discussion are originally written and derived from careful and systematic conduct of the research.

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