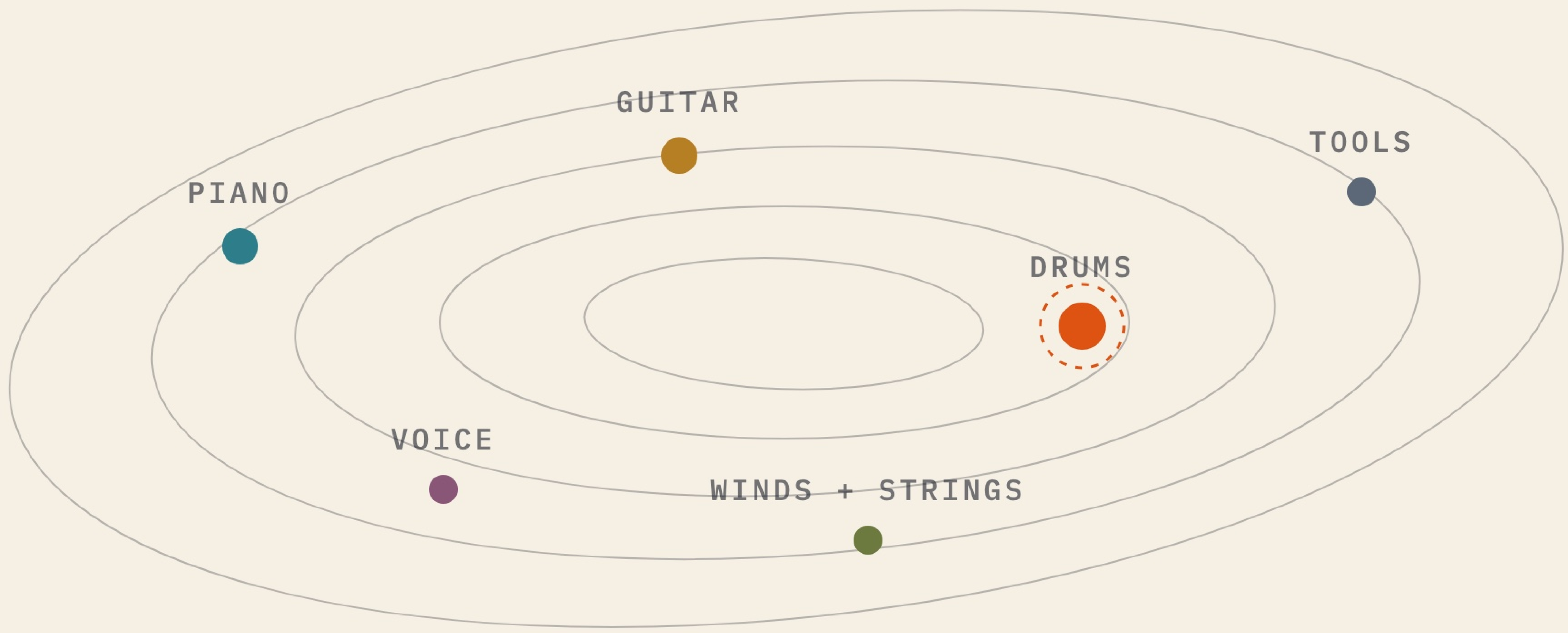
SEPTEMBER 2026

THE ONLINE MUSIC LEARNING LANDSCAPE

The first public map of the industry everyone sells into blind.



RAUL RODRIGUES · UPBEAT STUDIO

45+ PLATFORMS · SOURCED

Nobody publishes this industry.

Not the manufacturers. Not the platforms. Not a single analyst. Everyone sells into it blind. So I mapped it.

HOUSE RULES OF THIS MAP

01 45+ platforms, clustered by instrument

02 Who owns them, and who owns the owners

03 How each one makes money

04 A source on every number

05 Estimates labelled as estimates

Six instrument clusters. One map.

PIANO
10 MAPPED

Simply Piano · flowkey · Skoove · Pianote · Playground Sessions · Piano Marvel · Duolingo Music · Tomplay · OnlinePianist · La Touche Musicale

GUITAR
12 MAPPED

Yousician · GuitarTuna · Simply Guitar · Fender Play · JustinGuitar · Guitar Tricks · TrueFire Studios · Ultimate Guitar · Chordify · Guitareo · Songsterr · Rocksmith+

DRUMS
14 MAPPED

Drumeo · Melodics · Drum Coach · Drum Notes · Drum School · WeGroove · Senstroke · Aerodrums · Groove Shed · DrumKnee · Pocket Drums · Drumate · Drummer ITP · Beatlii

VOICE
5 MAPPED

Simply Sing · Singeo · 30 Day Singer · Vocal Image · Riyaz

WINDS + STRINGS
2 MAPPED

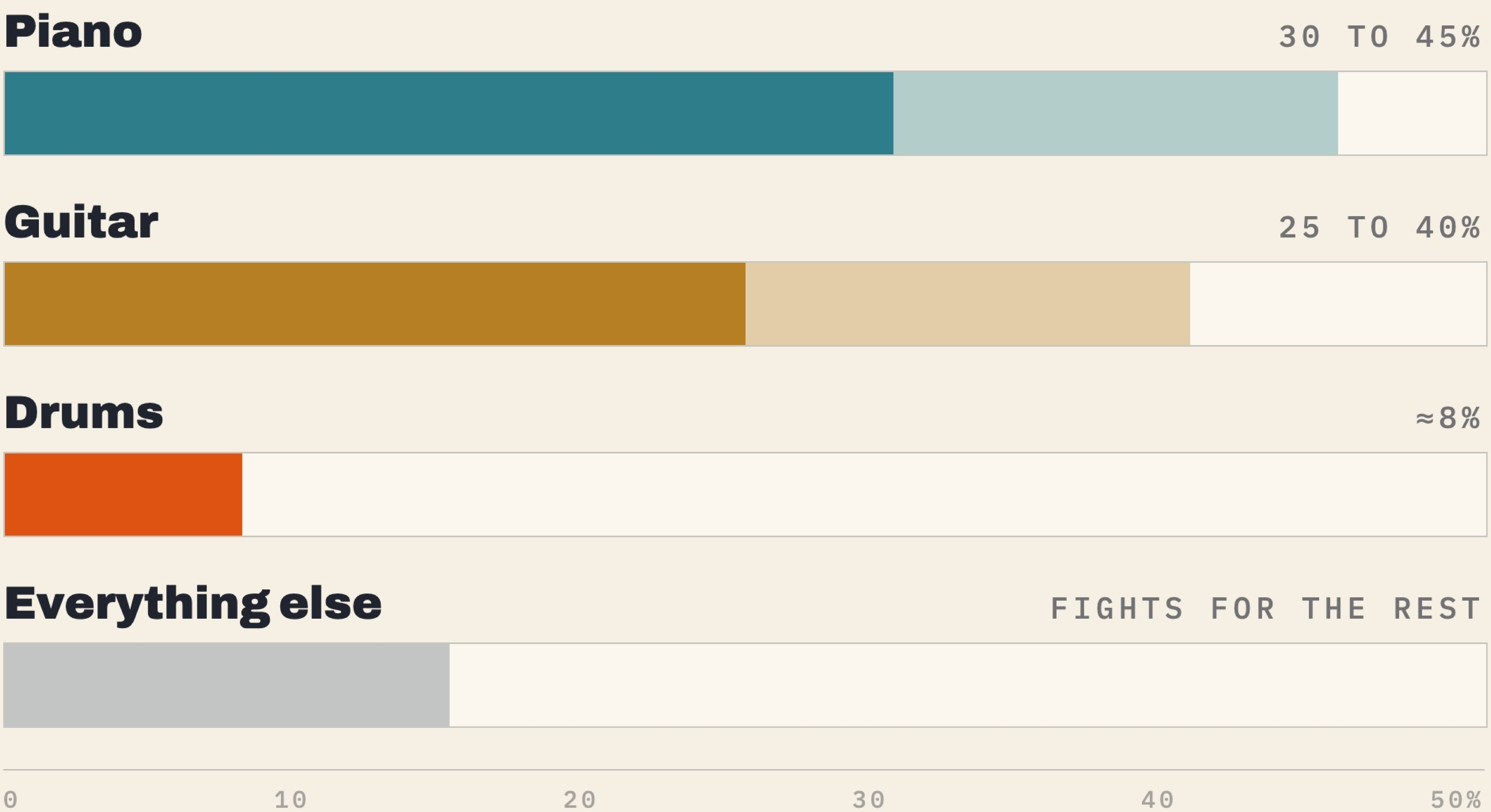
Tonestro · Trala

PRACTICE TOOLS
5 MAPPED

Moises · MuseScore · Soundslice · TonalEnergy · MakeMusic Cloud

SOLID = CORE · DASHED = THE LONG TAIL · STONE = GRAVEYARD, SLIDE 9 · MICRO-APP FLOOD: ITS OWN MAP IN OCTOBER

Every app war you've heard of is fought over two instruments.



Piano + guitar (+ ukulele) carry 65 to 80% of beginner demand. Drums is a real niche: not a rounding error, not a mass market.

YOUGOV / THOMANN 2022

STORE INSTALL DATA

SOLID = LOW END · TINT = SOURCED RANGE

The apps look independent. The ownership doesn't.

Muse Group

CONSOLIDATOR

Ultimate Guitar · MuseScore · Audacity · StaffPad · Hal Leonard

The tabs you read, the notation app you write in, and the world's largest sheet-music publisher. One owner.

Musora Media

FOUNDER-OWNED

Drumeo · Pianote · Guitareo · Singeo · PlayBass

Five brands, all built in-house. Buyout offers declined. One quiet exception: it now publishes bankrupt Freedrum's app, renamed Beatlii.

Simply

VC UNICORN

Simply Piano · Simply Guitar · Simply Sing

One brand system, three instruments, valued at $1B in 2021.

Growth Catalyst Partners

PE ROLL-UP

TrueFire · JamPlay · ArtistWorks · Blayze

A private-equity fund quietly rolled up the serious-hobbyist lesson market, 2019 to 2025.

An industry that hides its numbers.

Musora (Drumeo)	“mid-eight-figure” revenue · profitable · 100k+ paid subscribers	GLOBE & MAIL 2025
Yousician	€53.0M revenue · profitable	FINNISH REGISTRY 2025
Simply	$100M revenue · $1B valuation a year later · nothing public since	2020 TO 2021
Everyone else	undisclosed	

Nobody volunteers numbers. They surface where a founder talks, or where European law forces a filing. The rest of the category is dark.

How the money is made.

01	**Freemium subscription**	The category default. Simply, Yousician, flowkey, Skoove, and nearly everyone else.
02	**Free funnel**	GuitarTuna: 180M downloads feeding Yousician's paid apps.
03	**Hardware bundle**	Melodics × Roland, Alesis, Korg. flowkey & Tomplay × Yamaha.
04	**Membership**	Musora: one $30/mo membership across five instrument brands.
05	**Schools (B2B)**	MakeMusic Cloud, quietly alive in the band room.

The interesting plays are at the edges: funnels, bundles and memberships, not the default.

Manufacturers rent. They don't build.

BUILD	RENT	NEITHER
Casio: Music Space (2022)	Roland → Melodics	GEWA: no learning app found
Donner: Donner Play	Yamaha → flowkey (to 2027) · Tomplay (US 2024)	
	Alesis → Melodics	
	Korg → Skoove · Melodics	

THE EXCEPTION THAT PROVES IT

Fender Play is the only true manufacturer platform. Its celebrated pandemic surge was a free-promo peak: 930k at its height. The paying base before it: 110k. (Forbes, 2020 to 2022)

Nobody has built the drums equivalent.

Distribution alone doesn't crack this category.

TAKELESSONS

BOUGHT BY MICROSOFT 2021

CLOSED 2024

SOUNDTRAP

BOUGHT BY SPOTIFY 2017

SOLD BACK TO FOUNDERS 2023

ROCKSMITH+

UBISOFT · STUDIO CLOSED DEC 2024

MAINTENANCE MODE

FINALE

THE NOTATION STANDARD, 35 YEARS

SUNSET 2024

+ THE SENSOR-DRUM HARDWARE BET: FREEDRUM, BANKRUPT TWICE (2024)

Four giants, four retreats. Reach and content weren't enough. One exception stayed: that's the next slide.

One tourist stayed.

ABOVE · THE SUPER-APP

Duolingo Music rides inside an app with 137.8M monthly users, at price zero. And it sells a $249 piano with Loog.

THE MIDDLE

Standalone subscription apps, squeezed from both sides.

BELOW · THE FLOOD

A rising tail of tiny, single-purpose micro-apps.

THE MICRO-APP FLOOD GETS ITS OWN MAP IN OCTOBER

Three things this map says.

1 Consolidation started at the edges, in publishing and schools. Consumer apps are next.

2 Reach is the scarce asset. The biggest moats in this category are free funnels, not features.

3 Everyone monetises beginners. Nobody is measured on keeping them.

Number three is the one this series keeps coming back to.

Learning to play should not be intimidating.

That's the problem I build against at Upbeat Studio: Drum Coach, 200,000+ drummers across 180+ countries.

NEXT MAP · MID-SEPT **What the industry promises beginners vs. what actually happens.**

CORRECTIONS **Welcome, and credited. This map improves in public.**