



The Impact Of The Evolving Digital Content Landscape On The Independent Music Industry In Urban India

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Abstract: This research aims to investigate the impact of the evolving digital content landscape, particularly OTT video streaming platforms, on the independent music industry in urban India since 2020. The rise of these platforms has provided independent musicians with opportunities to showcase their work and collaborate with filmmakers, leading to a shift from traditional playback music to independent music. This research seeks to explore the perspective of consumers of OTT content on this shift, as well as the growing relevance of synchronization deals among independent musicians and filmmakers. The study will use an exploratory research method and collect data through secondary sources and qualitative non-disguised interviews.

Index Terms - Digital Content, Independent Music, OTT Video Streaming Platforms, Social Media, Synchronization Rights

I. PREAMBLE AND RATIONALE

From Gully Boy to Gehraiyaan, in recent years, independent musicians in India have been paving their way into the spotlight. “The booming career growth of Kabeer Kathpalia aka OAFF, alongside collaborator Savera Mehta, provides a powerful case study of independent musicians breaking it into mainstream media, riding the wave of a significant Bollywood film.” (Agrawal, 2022)

The advent of new digital channels has provided independent musicians with several avenues to showcase their work and connect with their audience. “The internet and digital media offer unparalleled opportunities for musicians to become successful without the support of major record labels, with the growing access to digital marketplaces.” (Haynes, 2018)

“To avoid major record label fees and protect their artistic freedom, several emerging musicians are moving away from major record labels,” (Haynes, 2018) thereby creating a generation of independent artists who are making more music than ever.

OTT video streaming platforms were first introduced in India in 2008 with the launch of BIGFlix by Reliance Entertainment and henceforth, started gaining momentum in 2013 with the launch of Sony Liv and Ditto TV by Zee. “Media consumption across the globe is increasingly happening in digital formats. The increase in the number of devices capable of supporting digital media along with increasing internet access speed, has provided consumers with an option to access the media content of his choice be it information, entertainment or social activity anytime, anywhere.” (Deloitte, 2013) Increased digital media consumption played a huge role in the growing popularity of OTT streaming platforms.

The COVID-19 pandemic had a significant impact on Over-The-Top (OTT) platforms, leading to a surge in the demand for online streaming services and the shift towards digital entertainment, as people sought alternative forms of entertainment while theatres and other traditional venues were closed. “On an average user spends approximately 3 hours on the medium. The lockdown has led to a change in consumption patterns of the users. The researcher found out that 73.6% of people experienced an increase in their daily usage of

OTT consumption. Users on an average experienced 3 to 4 hours of increase in their consumption during the lockdown.” (Patnaik, 2021)

OTT platforms have become a major player in the digital content landscape as they allow for direct-to-consumer streaming services, providing users with a wider variety of content options and more control over their viewing experience. Musicians, predominantly those who aren't signed to major record labels, are leveraging the reach of OTT platforms, collaborating with filmmakers and getting their music featured in OTT content via synchronization agreements. This has led to the works of independent musicians gaining more traction. “Content produced for the video OTT segment has begun to play a more important role in creating, using and promoting music – akin to Bollywood's age-old link to music.” (EY and FICCI, 2022)

“The current transition of the music industry in India, also displays a shift from popular and mainstream Bollywood music to a growing support of homegrown artists, alongside a rising demand for alternatives to the dominant commercial Bollywood music.” (Daga, India Beyond Bollywood? Exploring the Diverse Indian Independent Music Industry in the Digital Age, 2022) This transition has fueled the bridging of the gap between the independent musicians and filmmakers.

Synchronization deals have just started to gain traction in the Indian subcontinent, especially due to the emergence of OTT streaming platforms. “Currently, synchronization deals play a much greater role globally than in India. In the Indian subcontinent, synchronization deals have just started to gain traction, especially due to the emergence of OTT streaming platforms and simply owing to Shazam's presence.” (Agrawal, 2022) The establishment of corporations such as Dibbl and Fairplay is also indicative of its growth. “Sync rights grew 55% over 2020 as the economy began to come back to normal as the pandemic started to decline.” (EY and FICCI, 2022)

The growing number of synchronization deals can be directly attributed due to the high profitability and flexibility for musicians. “Songwriters hold the copyright to the lyrics and melody of a musical work (the composition) while recording artists hold the rights to the recording of the song, also referred to as the master recording.” (Cohen, 2022)

This research aims to explore how the independent music industry in urban India is being shaped by the evolving digital content landscape.

1.1 Research Objectives

This objective of this paper is to study the impact of the evolving digital content landscape on the independent music industry in urban India since 2020.

1.2 Sub Objectives

- To study the perspective of avid consumers of OTT content on the shift from conventional playback music to independent music within digital content.
- To examine the growing relevance of synchronization deals within the music industry in urban India.

1.3 Significance and Value

Although there has been quite a good number of studies focusing on Indian independent music and the digital content landscape, there is still insufficient documented information out there regarding their rapid evolution with the advent of digitization and the pandemic.

Knowledge gaps still remain about the ever-changing relationship between musicians and filmmakers, as well as the challenges and opportunities that have risen in recent years.

1.4 Research Approach

Literature Review: To proceed forward in this paper, the exploration will include desk research and case studies to interpret the context.

- Evolving digital content landscape
- Informal/Independent music industry
- OTT video streaming platforms
- OTT's influence on independent music

Methodology: The exploratory study will adopt a mixed-methods approach to gather comprehensive data and insights. The study will utilize various research methods, including literature review (secondary research), surveys, and in-depth interviews.

1.5 Scope of the Study

This study can be of use to independent artists, artist managers, independent music labels, etc., who are trying to understand the impact of emerging digital tools and formats and the influence they are having on consumer perspectives, as well as its changing nature. Not just this, but it will also be insightful for musicians, producers and filmmakers by providing an in-depth analysis of the growing relevance of synchronization deals in the Indian music industry and how it is paving new opportunities for rising independent artists.

II. LITERATURE REVIEW

The purpose of this section is to look at the existing literature available on this particular research topic and how the independent music industry in urban India, has been impacted by the evolving digital content landscape. Various publications, research papers, and books have been sifted through to analyze, (a) the perspective of consumers of OTT content on the shift from traditional playback music to independent music, alongside their music consumption patterns; (b) the growing relevance of synchronization deals amongst independent musicians and filmmakers in urban India and the bridging gap between both the industries.

2.1 Evolving Digital Content Landscape

The growth of digital media and online cultures has led to the creation of various media formats and content. The digital landscape has been rapidly evolving in recent years, with new technologies and platforms emerging that are transforming the way people consume and interact with digital content. In recent years, we've seen the rise of streaming services for video and music, the growth of social media and messaging apps, growing importance of AI and machine learning and the increasing popularity of virtual and augmented reality. "The technology is changing with clicks. From online banking methods to e-wallets and what not, with one click everything is available at your doorstep. The upcoming young generation take advantage of the same and recharge their online data packs and download videos and other possible internet-based applications." (Patnaik, 2021) Additionally, the proliferation of mobile devices has made it easier for people to access and consume digital content on-the-go. The increased use of artificial intelligence, 5G networks and other technologies is also expected to change the way people consume and interact with digital content in the future.

Digital content is evolving rapidly Long-form video content on OTT Streaming platforms and short-form video content on social media platforms currently dominate the content landscape.

"Following the success of the short-format video social media platform TikTok, other veteran social media platforms have launched their own version of it such as Reels launched by Instagram and Facebook, and YouTube Shorts launched by YouTube as an added functionality to their existing platforms. The short-format videos are forcing these companies to explore new business models to create and capture values in innovative ways." (Ziyi, 2020) The mainstream mode of creation on such platforms is User Generated Content, which is characterized by its high level of originality and low production requirements, as well as its short video length. The growing consumer base of these platforms can be attributed to "the multi-sided nature that social media platforms have which enables users to interact in innovative ways using resources provided by the platform owner such as the ability to create, publish and view short-format videos." (Imran, 2022)

On the other hand, OTT has become a major player in the digital content landscape as it allows for direct-to-consumer streaming services, providing users with a wider variety of content options and more control over their viewing experience. "OTT is the buzzword in the entertainment world today. It signifies entertainment anywhere and everywhere. Though the adoption of OTT services is a widespread phenomenon and has brought radical transformations in entertainment industry" (Kumari, 2020) Household names such as Netflix, Amazon Prime Video, and Disney+ have become leading players in the industry while disrupting the traditional media industry and bringing about significant changes in content production, distribution, and monetization.

2.2 OTT Video Streaming Platforms

OTT stands for over-the-top and refers to online video streaming services that provide access to a wide variety of content including movies, TV shows, live events and original productions through the internet, thereby eliminating the need for traditional cable or satellite television. “Over the Top services market is a large market comprised of media and entertainment industry, education and training industry, health and fitness, IT and telecom, ecommerce and others. Media and entertainment industry has emerged as the most dominant industry in Over-the-Top market due to increase in number of online video consumers.” (Kumari, 2020)

“With the expanding adoption of digital devices, consumers have more outlets than ever before to choose from for their video viewing pleasure. The fact that video consumption had increased in the early part of the 21st century is not only due to the availability of more devices, but also the flexibility and on-demand nature of video. The consumer has shifted to more customized experiences. TV viewing has become more and more time-shifted, and on-demand is how digital first platforms came out of the gates. People have more devices than ever in which to watch video.” (Nielsen, 2017)

The following passages further delve further into ‘the emergence of OTT platforms in India’ and ‘the prevalence of OTT platforms since 2020’.

2.2.1 Emergence of OTT Platforms in India

OTT streaming platforms were first introduced in India in 2008 with the launch of BIGFlix by Reliance Entertainment and henceforth, started gaining momentum in 2013 with the launch of Sony Liv and Ditto TV by Zee. “Media consumption across the globe is increasingly happening in digital formats. The increase in the number of devices capable of supporting digital media along with increasing internet access speed, has provided consumers with an option to access the media content of his choice be it information, entertainment or social activity anytime, anywhere.” (Deloitte, 2013)

Over the years, these services have become increasingly sought-after as consumers shift away from traditional TV and towards online streaming. “Once considered a luxury, an increasingly growing number of Indians are shifting towards cord-cutting or online streaming. While the figures show that the VoD industry is still at its nascent stage, the entry of almost 40 VoD companies in a span of just three years indicates the massive potential of the industry. Out of five Smartphone owners in India, at least four people watch content in at least one OTT app.” (News18, 2019) “The OTT apps have become the most downloaded app category ahead of social networking apps like Facebook, messaging apps like WhatsApp, and e-commerce apps like Amazon and Flipkart. The streaming market will collectively account for 46% of the overall growth in the Indian entertainment and media industry from 2017 to 2022.” (PwC India, 2018)

“Significant factors driving the growth of the VoD market in India are rising Internet & broadband penetration and declining data charges, the proliferation of internet-enabled mobile phones, personalization of content and pricing.” (Sundaravel, 2020).

2.2.2 Prevalence of OTT platforms since 2020

The COVID-19 pandemic had a significant impact on Over-The-Top (OTT) platforms, leading to a surge in the demand for online streaming services and the shift towards digital entertainment, as people sought alternative forms of entertainment while theatres and other traditional venues were closed. “When the pandemic kept people home, streaming services came to the rescue, providing audiences with filmed entertainment on their televisions, computers, tablets, and other digital devices.” (Hennig-Thurau, 2021)

Increased digital media consumption during the pandemic played a huge role in the sudden growth of OTT streaming platforms. A study conducted by Patnaik states that “on an average user spends approximately 3 hours on the medium. The lockdown has led to a change in consumption patterns of the users. The researcher found out that 73.6% of people experienced an increase in their daily usage of OTT consumption. Users on an average experienced 3 to 4 hours of increase in their consumption during the lockdown.” (Patnaik, 2021)

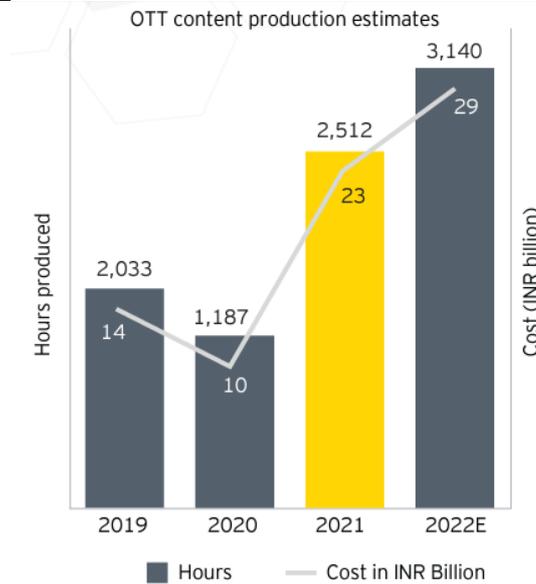
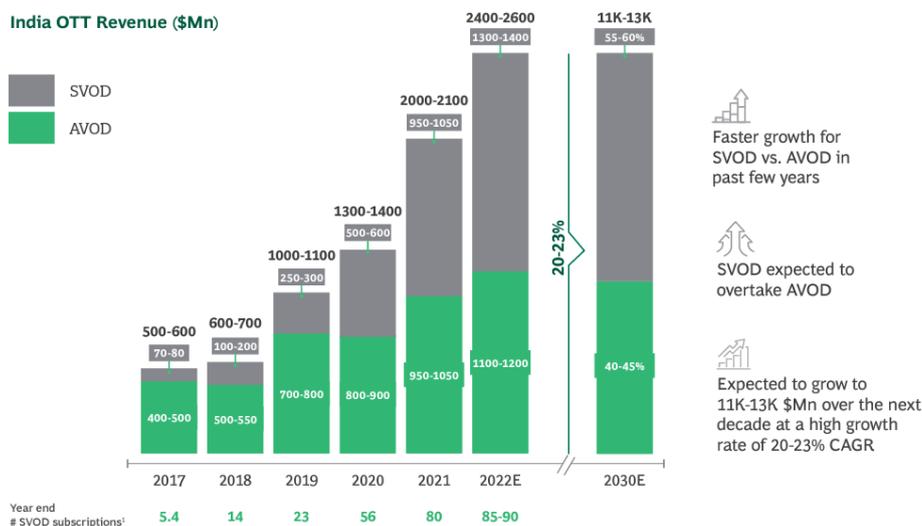


Fig 1. In 2021, OTT content production reached an all-time high with the increase in demand for Video on Demand platforms (EY and FICCI, 2022)

“During the pandemic, consumers have started to get into the habit of watching new films online, and we believe this trend is here to stay. It is estimated that an all-time high of 100+ films have been released on streaming platforms directly, without a theatrical release.” (EY and FICCI, 2022)

However, “the pandemic also had a negative impact on the production and distribution of original content, leading to delays and disruptions in the content pipeline. Additionally, the increased demand for bandwidth and online services put pressure on internet infrastructure, leading to technical issues for some users.” (Pandey, 2020)



- Faster growth for SVOD vs. AVOD in past few years
- SVOD expected to overtake AVOD
- Expected to grow to 11K-13K \$Mn over the next decade at a high growth rate of 20-23% CAGR

1. Number of year-end SVOD subscriptions in millions; includes direct and bundled subscriptions
 Source: Omdia database, BCG Analysis, Expert discussions

Fig 2. OTT subscription model has seen a surge over last five years (BCG & CII, 2022)

2.3 Informal/Independent Music Industry

The Indian independent music industry refers to the thriving music scene in India, which consists of musicians, artists, and record labels who operate independently of major commercial music labels. “To avoid major record label fees and protect their artistic freedom, several emerging musicians are moving away from major record labels. The internet and digital media offer unparalleled opportunities for musicians to become successful without the support of major record labels, with the growing access to digital marketplaces.” (Haynes, 2018)

The independent music scene in India has seen significant growth in recent years and is providing a platform for talented musicians to showcase their work. “Digitization has enabled the rise of independent musicians. The proliferation of software and other enabling applications have aided the rise of independent musicians. Music composition, publishing and distribution have become cheaper and easier with technology and digitization. The entire process of mixing, optimizing, and publishing the song is now accomplished digitally. Independent musicians are often able to go through all steps without technical support from sound engineers and publishers.” (Kedia, 2022)

“With affordability, self-production of music is becoming common among independent artists. Moreover, the advent of social media and streaming platforms has increased the opportunities for independent artists to collaborate with other artists. Marketing remains a key factor in the success of independent musicians. While social media has enabled independent musicians to market their songs and albums, they are unable to match the large marketing budgets and existing networks of record labels. New stakeholders have entered the marketing and promotion machinery. While television (TV), radio, and physical billboards remain popular, social media, audio and video OTT platforms have become the largest focus area to market and promote music.” (Kedia, 2022)

2.3.1 The Pandemic's Impact on Independent Music in Urban India

In 2020, the pandemic led to digitization in several ways. As mentioned earlier, with prolonged lockdowns and social distancing measures in place, live music events were cancelled and people turned to digital platforms for entertainment. This increased the demand for online music content, creating more opportunities for independent musicians to reach a wider audience through social media and digital streaming services- which consisted of audio streaming platforms such as Spotify, Apple Music, and SoundCloud; as well as, video streaming platforms such as YouTube, Twitch and other OTT platforms. “The lockdowns led to new windows of opportunity. It led to an increase in independent artists and non-film music as well as alternate forms of monetization. Live concerts shifted online and music streaming increased manifold. However, for the most part, it led to enormous losses. Traditional musicians who depend exclusively on performances at public gatherings were completely out of business. Most of these artists, performers and service providers belong to the informal sector.” (Kedia, 2022)

“While playing gigs remains the main source of income for the majority of Indian independent musicians, and as Brar points out, ‘especially regional acts that do not have a national following,’ many artists, out of necessity as opposed to ‘choice’, have found alternative sources of revenue. Royalties from streaming, as has been well documented, pay too little save for a handful of acts. After the first country-wide lockdown, indie artists increasingly began conducting online classes and workshops and taking on more commissioned commercial assignments such as composing and singing for advertising jingles.” (Gurbaxani, 2022) The shift to remote work and online communication also led to an increase in the use of digital tools for music production, distribution, and promotion. This allowed independent musicians to bypass traditional channels of communication and reach their audiences directly, henceforth, increasing their opportunities for financial and creative independence.

2.4 Music Rights in the Realm of Digital Content

Music rights play an integral role in the careers of artists since the ownership of these rights or by having a share in the rights to their music, musicians can generate ongoing revenue streams, allowing them to make a living as professional musicians. “The copyright in music (in the context of IPRS, these works are Literary Works (Lyrics) and Musical Works (musical composition) states that the artist, as an owner have the exclusive right to the piece of intellectual property. (IPRS, 2022) The rights pertaining to composition and lyrics are as follows:

- (i) "Reproduce the work in any material form;
- (ii) Perform the work in public;
- (iii) Produce, reproduce, perform or publish any translation of the work;
- (iv) Make any cinematograph film in respect of the work;
- (v) Make any sound recording in respect of the work;
- (vi) To communicate the work by broadcast or to communicate to the public by any means;
- (vii) Make any adaptation or translation of the work"

(Department For Promotion of Industry and Internal Trade, Government of India, 2012)

Copyright Societies are legal bodies established to help in protecting and safeguarding the interests of the rightful owners of the creative work. "Collective administration of copyright by societies is a concept where management and protection of copyright in works are undertaken by a society of authors and other owners of such works. No authors and other owner of copyright in any work can keep track of all the uses others make of his work. When he becomes a member of a national copyright society, that society, because of its organizational facilities and strength, is able to keep a better vigil over the uses made of that work throughout the country and collect due royalties from the users of those works." (Registrar of Copyrights, Government of India, 2014)

In India, the following copyright societies are present:

- The Indian Performing Right Society Limited (IPRS) is the central body administering Literary works associated with Musical Works
- Indian Singers Rights Association (ISRA) deals exclusively with Performers (Singers) Rights, and
- M/S Recorded Music Performance Limited (RMPL) regulates rights pertaining to Sound Recording Works

There are two distinct ways in which composition and lyric rights are dealt with in the Indian film industry:

1. "Work-for-hire" Agreements
2. Synchronization Deals

The text that follows provides an in-depth examination of the legal agreements between musicians and filmmakers.

2.4.1 Work-for-hire Agreements

Work-for-hire deals are most commonly used in the mainstream film industry, particularly Bollywood, and refer to a type of agreement in which a producer or production company hires an artist, such as a music director, composer or musician, to create a work, and the rights to that work are transferred to the hiring person or company. In this type of arrangement, the person or production company that hires the artist is considered the owner of the work and has the right to use and exploit it as they see fit, without the need for additional permission from the license holder.

"Film music, particularly Bollywood, has played and still plays a dominant role in India's music industry. Composers and musicians are hired directly by film producers, creating music specifically for a film under a "work for hire" agreement, in which the producer retains the rights to the composition and lyrics. This is becoming increasingly common in the OTT industry as well. In such an agreement, the ownership of the composition is transferred to the film's creators, which is in most cases the producer of the film. Music labels such as T-Series often claim complete ownership to the resultant music in large-scale Bollywood productions such as that of Dharma Productions and Yash Raj Films." (Churamani, 2023)

In Bollywood, work-for-hire deals are common in the film industry, where music composers, lyricists, and singers are hired by producers to create original music for their movies. The terms of the deal, including the compensation and ownership of the rights, are usually negotiated and agreed upon before the work is created.

2.4.2 Synchronization Agreements

A sync license is a legal contract that allows for the use of a specific piece of music or audio in conjunction with a visual production, such as a film, television program, video game, advertisement, or other multimedia project. The license gives the right to use the music in a synchronized manner with the visual elements. "When an artist licenses a piece of music, they are allowing others to use it while still retaining ownership of the work. The owner of the rights to the music can decide the terms and conditions of the license, which can be negotiated with the person or organization that wants to use the music. The license agreement typically includes information about the intended use and how long the license will last." (Churamani, 2023)

“The sync market is not yet very developed in India, but sync is a great way for artists to raise the profile of a song and have revenues. To place a song for sync, the owner of the composition and lyrics needs to have the right contacts, know their requirements, and submit appropriate music to them. There are no standard fees; the fee is always the result of a negotiated agreement between the client and the owner of the work, making it an extremely flexible option as opposed to traditional licenses.” (TuneCore, 2022)

The year 2022, displayed the growing relevance of synchronization deals which can be directly attributed due to the high profitability and flexibility for musicians alongside digitization. “Songwriters hold the copyright to the lyrics and melody of a musical work (the composition) while recording artists hold the rights to the recording of the song, also referred to as the master recording.” (Cohen, 2022) “Synchronization rights in India grew 55% over 2020 as the economy began to come back to normal as the pandemic started to decline.” (EY and FICCI, 2022)

“Currently, synchronization deals play a much greater role globally than in India. In the Indian subcontinent, synchronization deals have just started to gain traction, especially due to the emergence of OTT streaming platforms and simply owing to the presence of Shazam.” (Agrawal, 2022) The establishment of corporations such as ‘Dibbl’ and ‘Fairplay’, which are aggregators between independent musicians and filmmakers, is also indicative of its growth. Digital content distribution platforms such as ‘SwaLay’ is also empowering Independent Indian artists by bringing them into the limelight.

2.5 The Paradigm Shift: From Playback Music to Independent Music

From Gully Boy to Gehraiyaan, in recent years, independent musicians in India have been paving their way into the spotlight. “The booming career growth of Kabeer Kathpalia aka OAFF, alongside collaborator Savera Mehta, provides a powerful case study of independent musicians breaking it into mainstream media, riding the wave of a significant Bollywood film.” (Agrawal, 2022)



Fig. 3 The 18-track soundtrack of **Gully Boy** features independent hip-hop artists such as DIVINE, Naezy, Sez on the Beat, Rishi Rich, Dub Sharma, Jasleen Royal, Ace, Ishq Bector, MC Altaf, MC TodFod, 100RBH, Maharya, Noxious D, Viveick Rajagopalan etc. (Akhtar, 2019)

In recent years, the Indian film industry, has undergone a change as it moves away from solely relying on major music directors and begins to include music by independent artists. “The current transition of the music industry in India displays a shift from popular and mainstream Bollywood music to a growing support of homegrown artists, alongside a rising demand for alternatives to the dominant commercial Bollywood music.” (Daga, India Beyond Bollywood? Exploring the Diverse Indian Independent Music Industry in the Digital Age, 2022) This shift is driven by various factors such as the rise of new and talented independent artists, changing audience tastes, and the growing sync market.

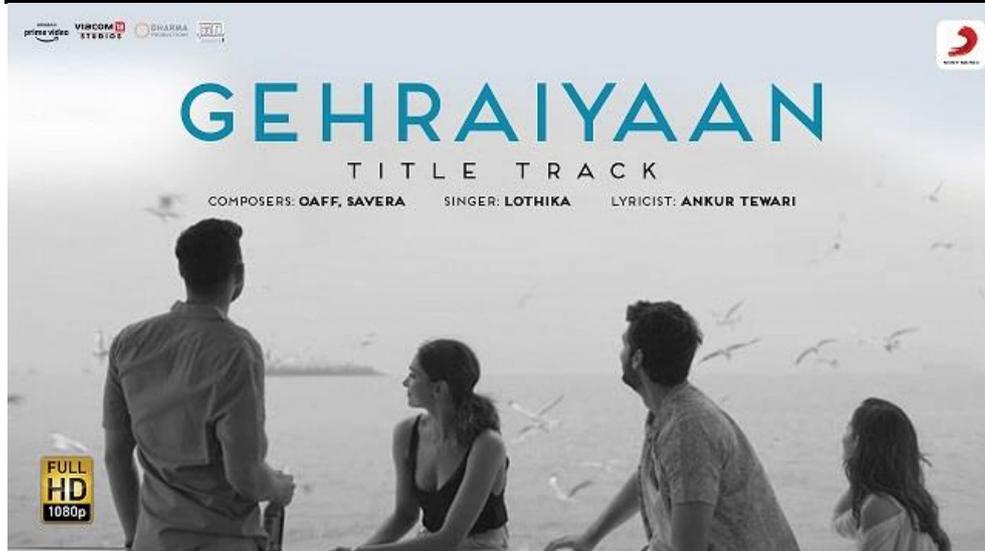


Fig. 4 The soundtrack of **Gehraiyaan**, was composed by producers, OAFF (aka Kabeer Kathpalia) and Savera, alongside singers, Lothika and Ankur Tewari, merged the worlds of mainstream film and independent music. (Batra, 2022)

The lack of film releases in 2020 and 2021 have led to the growth of non-film music, which we believe has created a new audience. While non-film music is currently a niche audience, its growth is expected to pick up – particularly in regional markets, and this could increase its share to over 30% by 2025. (EY and FICCI, 2022)

2.6 OTT's Influence on Independent Music

“Music creation as well as consumption have seen sharp shifts with digitalization. Mainstreamed by the film industry in the past, there are observable successes in the emerging non-film sector. A series of independent artists have attained stardom in what is now referred to as the democratization of an industry largely driven by big record labels and the film industry. Advancements in technology have lowered the costs of various activities in the value chain including recording, mixing, publishing and distribution. Many popular songs by independent artists are picked up by music directors for their films. Over The Top (OTT) platforms such as Netflix, Amazon Prime Video, Voot, Zee5, SonyLiv, etc., also provide lucrative options to independent musicians. While the popularity of Bollywood and regional film industries have weakened, they still remain dominant.” (Kedia, 2022)

“In an indirect consequence of the pandemic, several indie artists have been involved in or signing synchronization deals with OTT films and series, and even Bollywood movies like Gehraiyaan (OAFF), Dhamaka (Prateek Kuhad), and Jee Le Zara (When Chai Met Toast).” (Gurbaxani, 2022)

Several independent artists have gone on to create music for OTT platforms. Some significant instances are as follows:

- In 2020, producer Achint Thakkar secured a streaming hit with his theme for the web show Scam 1992. He further went on to compose the score for “Rocket Boys” in 2022.
- In 2021, When Chai Met Toast’s single 'Firefly' was used in the promotion of ‘Jee Le Zara’, as well as, in the Netflix comedy special, ‘Vir Das: For India’.
- In 2022, Singer/songwriter, Kamakshi Khanna and producer, OAFF’s track ‘Duur’ was featured in ‘The Fame Game, a Netflix Original.
- In 2023, ‘Depressant’ by the Dibbl artist, Noni-Mouse, was synced to the Netflix series titled ‘Class’, which is the Indian adaptation of the Spanish Netflix Original series, ‘Elite’. Janoobi Khargosh was featured in the same and aggregated through Dibbl.
- ‘Khaare Raste’ by the Dibbl artist, Raghav Kaushik, was featured in the promo of a Sony TV series titled ‘Katha Ankahee’.



Fig. 5 Kamakshi Khanna's 2021 single 'Duur' was featured on Netflix's The Fame Game. (Bejoy Nambiar, 2022)

- In 2022, Pune-based group, Easy Wanderlings' track 'Enemy', a song talking about Cancel Culture, made its way on to Shakun Batra's 'Gehraiyaan'.
- In 2022, Maalavika Manoj, aka. Mali marked her Bollywood debut earlier this year by singing "Maange Manzooriyan" in the drama film 'Badhaai Do'.
- Sameer Rahat and Hybrid Protokol composed the Original Motion Picture Soundtrack for the SonyLIV drama Homecoming released in 2022.
- In 2022, the OST (Original Soundtrack) of the well-renowned Amazon Prime Series, 'Jugaadistan', was composed by Indian Ocean and The Yellow Diary.
- Again, Kamakshi Khanna has also collaborated with pop duo Parekh & Singh for 'Chhan Chhan' in 'Kaun Banegi Shikharwati', and with Vaibhav Bundoo for 'Tere Jaisa', in the web series 'Kota Factory'.
- Other such examples include, Prateek Kuhad's in 'Little Things', Prabh Deep and Sez on the Beat in 'Paatal Lok'; Darshan Raval in '4 More Shots', Nilotpal Bora in TVF's 'Tripling', Vaibhav Bundhoo in TVF's Pitchers and Mohan Kannan in 'Laakhon Mein Ek'.



Fig. 6 In 2018, Pause by Prateek Kuhad was composed to promote the Netflix India series, Little Things (2016-19), paving the way forward for several independent musicians being featured on major OTT platforms. (Ajay Bhuyan, 2018)

“Content produced for the video OTT segment will begin to play a more important role in creating, using and promoting music – akin to Bollywood’s age-old link to music. It is expected that the OTT segment will use/ create 500-600 songs each year by 2025.” (EY and FICCI, 2022)

Tying back to what has been mentioned in sub-heading 3 i.e., “marketing remains a key factor in the success of independent musicians.” (Kedia, 2022) Musicians are leveraging the reach of OTT platforms,

collaborating with filmmakers and getting their music featured in OTT content via synchronization agreements. This has led to the works of independent musicians gaining more traction. The synchronization agreements bridge the gap between independent musicians and filmmakers by creating a mutually beneficial relationship that provides exposure and revenue for both parties. This can be observed in the case of the film, 'Gehraiyaan' and the Netflix series, 'The Fame Game'.

The teaser for the movie *Gehraiyaan* was released on December 20, 2021 in the form of an Instagram reel posted by the entire cast and crew. The music used in the teaser was a Hindi rendition of OAFF and Savera's previous independent release, a track named "Frontline." The Hindi version for the movie was written by Ankur Tewari and featured Lothika, the same singer from the original track. The song recording quickly became popular on Instagram and had viewers eagerly anticipating the full song. Meanwhile, the original song "Frontline", which was released in November 2018, experienced renewed interest. A comparison is provided of its performance before and after the teaser was released.

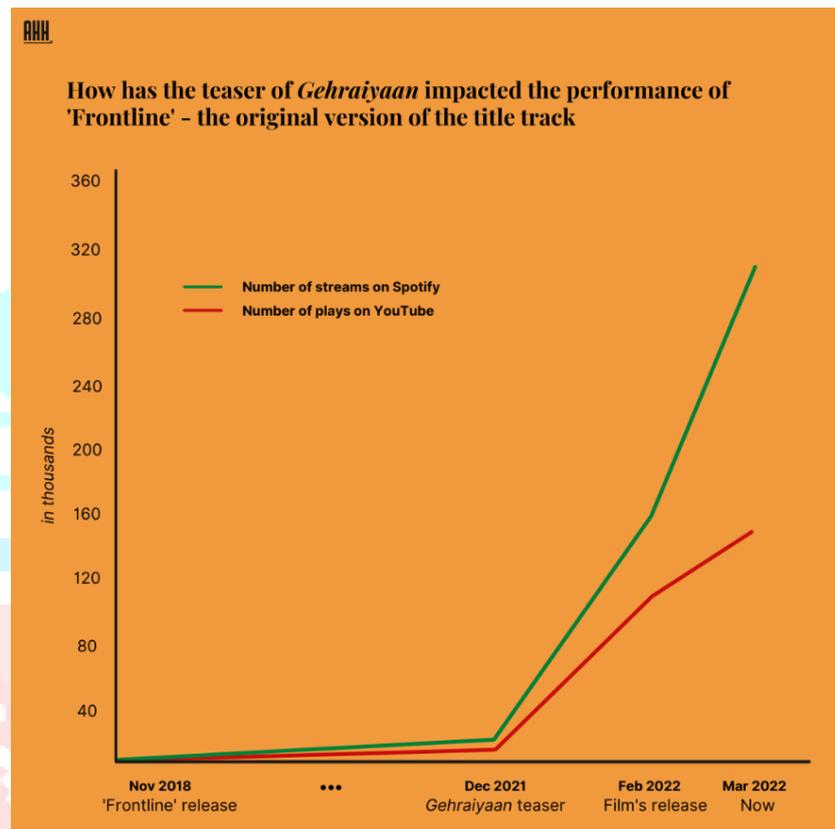


Fig. 7 How has the teaser of *Gehraiyaan* impacted the performance of 'Frontline' – the original version of the title track. (Agrawal, 2022)

Similarly, Kamakshi Khanna's track 'Duur', co-created with OAFF, was recently featured in two OTT series, 'The Fame Game' on Netflix and 'Jugaadistaan' on Lionsgate Play. Unlike the case with *Gehraiyaan*, the music was not heavily promoted in either series. Despite this, there was an increase in popularity after the series were released. The following graph shows the impact of the release of 'The Fame Game' on the popularity of 'Duur'.

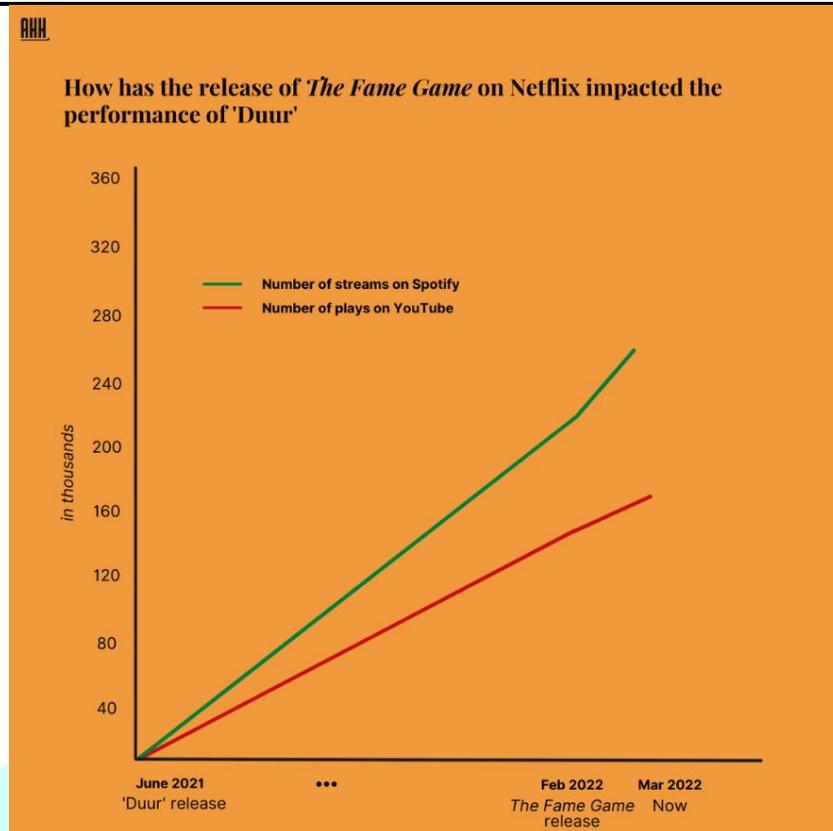


Fig. 8 How has the release of 'The Fame Game' on Netflix impacted the performance of 'Duur'. (Agrawal, 2022)

To summarize, the arrival of OTT platforms has made a noteworthy impact on the independent music sector in India by giving independent musicians increased exposure, a direct means of monetization, diversified streams of revenue, access to data and audience insights, and a rise in collaboration opportunities due to growing relevance of synchronization agreements.

III. RESEARCH METHODOLOGY

Although there has been quite a good number of studies focusing on Indian independent music and the digital content landscape, there is still insufficient documented information out there regarding their rapid evolution with the advent of digitization and the pandemic. Knowledge gaps still remain about the ever-changing relationship between musicians and filmmakers, as well as the challenges and opportunities that have risen in recent years.

As it is indicated in the title, this chapter includes the research methodology of the research. An exploratory study, therefore, is planned to be conducted with the objective of

- To study the perspective of consumers of OTT content on the shift from traditional playback music to independent music being used in digital content.
- To examine the growing relevance of synchronization deals amongst independent musicians and filmmakers in urban India and the bridging gap between both the industries.

3.1 Literature Review

The initial goal while writing this exploratory paper is to find out the existing content and information on the digital content landscape, independent music in urban India, OTT video streaming platforms, social media, and synchronization rights.

While writing this research literature review, it is also crucial to keep in mind the line of questioning should align with the objective and sub-objectives.

3.2 In-depth Interviews

Following the comprehensive literature review, a series of in-depth interviews are to be conducted to explore the relationship between the evolving digital content landscape and its influence on the independent music segment in India. Engaging with industry professionals such as independent musicians, music journalists and industry experts, serves as a valuable means of acquiring valuable insights necessary for a

comprehensive understanding of the subject matter. These conversations proved instrumental in gaining contextual depth and forming a well-informed perspective on the topic at hand.

3.2.1 Harsh Tokas and Yogi Tandon (Aggregator Business - DIBBL)

Harsh Tokas and Yogi Tandon are the co-founders of DIBBL, a music licensing and supervision agency for filmmakers across India to discover fresh music for ad films, movies and web-shows. DIBBL represents a catalogue of more than 250 independent artists, with over 2,500 soundtracks ranging from 'pop' title tracks to cinematic scores. Over the course of the last two years, the Delhi-based startup has managed to garner a roster of clients consisting of industry giants such as Dharma Productions, Netflix, Sony, Amazon Prime, Applause Entertainment, Roy Kapoor Films, and many more.

Questions:

1. Can you describe your experience with sync licensing? How did you first get involved with this segment of the music industry?
2. What inspired the idea behind DIBBL?
3. What role does DIBBL play in the lives of musicians and filmmakers? How is this impacting the relationship between both industries?
4. There has been a paradigm shift within the music industry in India from a focus on mainstream film music to an emphasis on independent music. In what ways do you believe DIBBL has been contributing to bringing about this change?
5. Can you describe the functioning of the company? What are the steps undertaken to get the perfect soundtrack on the big screen?
6. Can you please elaborate on the growing relevance of synchronization deals in India in the last few years? Have you noticed any trends, particularly with regard to the independent music segment?
7. How does sync licensing differ from other types of music licensing deals? Do you think they have become more important specifically for independent musicians in recent years? If so, why do you think this is the case?
8. How do you go about promoting the music of the artists you represent? Have you utilized any specific strategies to increase their visibility?
9. What obstacles have you encountered during your journey with DIBBL? How did you overcome these challenges?
10. What makes DIBBL stand out from its competitors?
11. Where do you think music licensing aggregators such as DIBBL are heading in the future with the evolving digital content landscape?
12. What is your prediction about the future of the independent music industry with regard to sync licensing?
13. Can you please share a few of your favourite projects which you have worked on? Any exciting upcoming projects or releases that you would like to share?
14. Before we end this discussion, is there anything else you would like to share regarding your experience?

3.2.2 Sukanya Agrawal (Music Journalist)

Sukanya Agrawal is the founder of A Humming Heart, an innovative music publication that covers the Indian indie music industry through features, music reviews, podcasts, and interviews. With a background in music distribution for Indian independent artists, she has been working very closely with independent musicians for over 5 years.

Questions:

1. Please share your background and experience in the independent music industry in India.
2. What is the impact of the OTT content landscape on the independent music industry?
3. Can you tell us a bit about the growing relevance of synchronization agreements in India?
4. How is the relationship between independent musicians and filmmakers evolving in with the advent of OTT platforms?
5. Can you share a few instances of successful partnerships between Indie musicians and OTT platforms.
6. How do you see the future of the independent music industry in India evolving in the context of OTT content and digital media?

3.2.3 Anchit Magee (Independent Musician)

Anchit Magee is a guitarist and singer songwriter popular among the Delhi Indie music circuit. He has mostly been self-taught and started writing songs at the age of 17 while still in college. He currently works as a music educator, as well as the Content and Curation Manager at DIBBL. His music style ranges from Pop to Rock and he's been heavily influenced by the likes of John Mayer, Ed Sheeran and Steven Wilson, and also works as a session musician occasionally. His EP Adhoore is said to be featured on OTT series in late 2023.

Questions

1. Please share your background and experience in the independent music industry in India.
2. How is the emergence of OTT impacting the work you do?
3. How has music acquisition for film and television changed over the years?
4. How do filmmakers discover and use your music your work? What is the difference between work-for-hire agreements and synchronization agreements?
5. How is the relationship between independent musicians and filmmakers evolving in with the advent of OTT platforms?
6. What do you think is the future of the independent music industry in the context of OTT content and new digital formats of media?

3.2.4 Sidhartha Pradeep (Independent Musician turned Film Composer)

Sidhartha Pradeep is a composer extensively working in the Mollywood film industry. He started his career in music as an independent producer/composer and gradually transitioned towards doing projects for feature length films and series. He is most popularly known for Keedam (2022), The False Eye (2020) and Ottamuri Velicham (2017).

Questions

1. Please share your background and experience in the independent music industry in India.
2. How is the emergence of OTT impacting the work you do?
3. How has music acquisition for film and television changed over the years?
4. How do filmmakers discover and use your music your work? What is the difference between work-for-hire agreements and synchronization agreements?
5. How is the relationship between independent musicians and filmmakers evolving in with the advent of OTT platforms?
6. What do you think is the future of the independent music industry in the context of OTT content and new digital formats of media?

3.2.4 Amira Gill (Independent Musician featured on OTT)

Amira Gill is a vocalist, songwriter, and. music therapist from New Delhi. She has a degree in. Music Therapy from Berklee College of Music, Boston. Known for her vocal versatility and soulful singing, she writes original music in Hindi, English, and Punjabi. However, her musical collaborations have been pan-Indian and global; language never posing as a barrier to creativity. She has composed and written music for OTT series Minus One and Faadu.

Questions

1. Please share your background and experience in the independent music industry in India.
2. How is the emergence of OTT impacting the work you do?
3. How has music acquisition for film and television changed over the years?
4. How do filmmakers discover and use your music your work? What is the difference between work-for-hire agreements and synchronization agreements?
5. How is the relationship between independent musicians and filmmakers evolving in with the advent of OTT platforms?
6. What do you think is the future of the independent music industry in the context of OTT content and new digital formats of media?

3.3 Survey

The survey was conducted among 110 respondents within the target audience to study the perspective of consumers of OTT content on the shift from traditional playback music to independent music being used in digital content. The survey helped me to understand their awareness and opinion on the matter, as well as understand the impact OTT content has had on their music listening habits. The survey was drafted as follows and consisted of the following questions:

Here is a quick survey to study the impact of over-the-top (OTT) streaming platforms on Indie music industry in India. Scroll down to get started!

This survey is for educational purposes. All personal details shall be kept confidential, not shared anywhere.

1. **Name:** *
2. **Age Group** *
 - 15 – 18
 - 18 – 24
 - 25 – 34
 - 35 – 44
3. **Gender** *
 - Female
 - Male
 - Trans
 - Non – Binary
 - Prefer not to say
4. **Education** *
 - High-School
 - Undergraduate
 - Postgraduate
 - Doctorate
 - None of the above
5. **Employment Status** *
 - Student
 - Full-time employment
 - Part-time employment
 - Unemployed
 - Self-employed
 - Home-maker
 - Retired
6. **City of Residence** *
 - Delhi NCR
 - Mumbai
 - Bengaluru
 - Chennai
 - Hyderabad
 - Ahmedabad
 - Kolkata
 - Pune
 - Others

OTT Streaming Platforms

OTT stands for over-the-top and refers to online video streaming services that provide access to a wide variety of content including movies, TV shows, live events and original productions through the internet, thereby eliminating the need for traditional cable or satellite television.

7. Which OTT platforms do you use? *

- Netflix
- Amazon Prime
- Disney+ Hotstar
- Zee5
- Sony Liv
- Voot
- Eros Now
- Discovery Plus
- MUBI
- Apple TV+
- Other

8. On average, how much time do you spend consuming OTT content in a day? *

- Less than 1 hour
- 1-3 hours
- 3-5 hours
- 5-7 hours
- More than 7 hours

9. How do you discover new music? *

- Less than 1 hour

10. OTT platforms serve as a space for all kinds of musical artists to come together and showcase their work. *

Strongly Disagree

- 1
- 2
- 3
- 4
- 5

Strongly Agree

11. OTT has played a role in shaping your taste and preferences towards music. *

Strongly Disagree

- 1
- 2
- 3
- 4
- 5

Strongly Agree

Independent/Indie Music

The independent music industry refers to the segment of the music industry, which consists of musicians, artists, and record labels who operate independently of major commercial music labels.

12. Do you think there is a rise in independent music on OTT platforms? *

Strongly Disagree

- 1
- 2
- 3
- 4
- 5

Strongly Agree

13. What qualities do you usually look for in the music you regularly listen to? *

- Originality and creativity of the music
- Cultural and regional relevance of the music
- Social media influence and popularity of the artist

- Other

14. Which of the following musicians have you heard of? *

- Prateek Kuhad
- Naezy
- OAFF
- Kamakshi Khanna
- Ankur Tewari
- Mali (aka Maalavika Manoj)
- The Yellow Diary
- When Chai Met Toast
- Prabh Deep
- Lothika

Click below to listen to Track 1.

*Audio snippet of *Doobey* by OAFF, Lothika, Kausar Munir, Savera, which was featured on *Gehraiyaan* (2022).

15. Are you familiar with Track 1? *

- Yes
- No
- Maybe

Click below to listen to Track 2.

*Audio snippet of *Pause* by Prateek Kuhad, which was featured on *Little Things* (2018).

16. Are you familiar with Track 2? *

- Yes
- No
- Maybe

Click below to listen to Track 3.

*Audio snippet of *Duur* by Kamakshi Khanna and OAFF, which was featured on *The Fame Game* (2022).

17. Are you familiar with Track 3? *

- Yes
- No
- Maybe

IV. RESEARCH DATA AND FINDINGS

4.1 Literature Review

The digital content landscape has been rapidly evolving, driven by advancements in technology and the proliferation of online platforms. The growth of digital media and online cultures has led to the creation of various media formats and content. New technologies and platforms are transforming the way people consume and interact with digital content.

The rise of streaming services for video and music, the growth of social media and messaging apps, the increasing importance of AI and machine learning, and the popularity of virtual and augmented reality are some of the key trends in the evolving digital content landscape. The proliferation of mobile devices has made it easier for people to access and consume digital content on-the-go. The increased use of artificial intelligence, 5G networks, and other technologies is also expected to further change the way people consume and interact with digital content in the future.

Long-form video content on OTT streaming platforms and short-form video content on social media platforms currently dominate the content landscape. Platforms like TikTok, Instagram Reels, and YouTube Shorts have gained popularity for short-format videos, and they are forcing companies to explore new business models to create and capture value in innovative ways. The multi-sided nature of social media platforms allows users to interact in innovative ways using the resources provided by the platform owner.

OTT (over-the-top) platforms have become major players in the digital content landscape, offering direct-to-consumer streaming services that provide users with a wide variety of content options and more control over their viewing experience. Platforms like Netflix, Amazon Prime Video, and Disney+ have

disrupted the traditional media industry and brought significant changes in content production, distribution, and monetization. The OTT market has witnessed significant growth due to factors such as rising internet and broadband penetration, declining data charges, the proliferation of internet-enabled mobile phones, personalization of content, and pricing. OTT platforms have gained significant traction in India over the years. The emergence of OTT platforms in India started in 2008 with the launch of BIGFlix by Reliance Entertainment, and since then, the industry has grown rapidly. Platforms like Sony Liv and Ditto TV by Zee were launched in 2013, contributing to the increasing popularity of OTT services.

The Indian market has witnessed a shift towards online streaming as consumers increasingly cut the cord and embrace digital entertainment. The entry of numerous OTT companies in a span of a few years indicates the massive potential of the industry. The convenience, affordability, and personalized content offerings of OTT platforms have attracted a large number of users. OTT apps have become one of the most downloaded app categories, surpassing social networking, messaging, and e-commerce apps. Factors driving the growth of the OTT market in India include rising internet and broadband penetration, declining data charges, the proliferation of internet-enabled mobile phones, personalization of content, and competitive pricing. The COVID-19 pandemic further accelerated the growth of OTT platforms as people turned to online streaming services for entertainment during lockdowns and social distancing measures.

The independent music industry in India refers to the thriving music scene consisting of musicians, artists, and record labels operating independently of major commercial music labels. Independent musicians in India aim to avoid major record label fees and protect their artistic freedom by leveraging the opportunities provided by the internet and digital media.

The Indian independent music scene has witnessed significant growth in recent years, offering a platform for talented musicians to showcase their work.

4.2 In-depth Interviews

The interview provided valuable insights about music acquisition and licensing in the OTT space OTT, the evolving relationship between independent musicians and filmmakers, and synchronization agreements. Some key takeaways from the discussions with regards to the influence of the evolving digital content landscape on the independent music industry, are as follows:

4.2.1. Harsh Tokas and Yogi Tandon (Aggregator Business - DIBBL)

“Sync licensing right now in the industry is a very novel concept. It is very difficult to plug it in anywhere and everywhere because there is a certain school of thought who opts in for sync licensing. So, rather than looking at it as a project-to-project basis, the way sync licensing really gets injected in a project is when a director brings a certain school of thought.

During the making of a film/series, there are two schools of thought, playback/composition, wherein artist(s) are hired to compose music exclusively for the project and the other school of thought is that there is amazing music already out there and we can reduce our costs and we already get a good gist of the final product by syncing it to the visual, rather than getting something composed. Why not look at a final product from day one and try to fit it in, in what has to be made, rather than making two things simultaneously, which is it's about matching the right story with the right song. And there is a lot of content in India and people have started realizing that,” Harsh Tokas explained.

Yogi Tandon further added, “filmmakers have, in fact, started finding that music content and started infusing that into the videos, web shows, movies.”

Harsh Tokas stated, “Licensing for Indian artists is going to become more and more important within platforms that cater to retail streaming. Licensing is a form of commercial exploitation. And commercial exploitation is only being done for commercial music right now.”

“So, the entire idea is that artists need to be paid because some party is using their music and earning on their music,” Yogi Tandon elaborates, “and just talking about sync licensing, the numbers are increasing every day. There's a new OTT platform coming every day. There's new kind of shows coming up, new movies every day. And then of course there's, there's the international market that needs to be introduced to Indian music. Language is not a barrier. Most of the independent artists are releasing music in English.”

Harsh concludes by saying, “it's going to change everything end to end. There's going to be a time when we are following the same format as the western countries where music, the first thought that comes to your head is licensing or a certain Indie artist who needs to make the music. It'll never be about getting a music director, from the jump. Music directors work with a small set of people that they're very well versed with. But soon things are going to change. It's going to be about vocal rich textures. It's going to be about out of the box melodies. Those are the things that stand out. There's a certain playbook when you listen to certain

music, you always feel it's outdated. That consumers are getting ahead of the curve here and filmmakers need to catch up at the end of the day. And filmmakers are realizing this.”

4.2.2. Sukanya Agrawal (Music Journalist)

“Now there is a very interesting crossover between 'film & TV music' and 'independent music' only due to OTT, because with OTT since there is a lot more content being produced on a daily basis, work is generated not only for musicians, but also for every single creative aspect for web-show creation or a filmmaking set. so, naturally that means that there's more work for musicians as well. And the good thing is because they need more and more musicians, they have money doing that. They have finally turned their eyes towards the independent musicians who have already been working as professionals in the industry for a very long time. The artist ends up getting a lot more visibility and a lot more listeners, compared to what they would if they were just putting out songs independently on Spotify or Apple Music. We've seen a lot of interest towards independent music, now in the OTT and film space and it's one of the best ways because this is one of the very, very few ways in which artists are not only able to get exposure but also make money out of it.”

“One of the major things that has happened recently is that, now, we get to hear a lot of different kinds of sounds in the Indian shows that we watch. That's one of the best things - filmmakers are willing to take more risks, they're willing to be more experimental, and they're willing to give more answers to newer musicians. And that's having a positive impact of the independent music segment. Apart from that, now Indie musicians are also able to have a little more of a collaborative process due to the lack of one central music director.”

“Traditionally, Hindi films have had songs in random places. They had no meaning or no impact on storytelling. But now music also plays an integral role in the storytelling part of visual content.”

4.2.3. Anchit Magee (Independent Musician)

“It all depends on digital media now, like music has changed completely from labels to the big guys and, you know, everything revolves around digital media. An artist's numbers matter most. Some artists can say that, you know, it's a bit of a sell-out thing that, you know, you're an influencer/artist but that is a part of the job. You have to be good on digital platforms and be good with social media if you want to be a successful artist these days. And it's going to work to your advantage because in the previous days when these platforms did not exist, what came out in terms of music in film was decided by a bunch of people in a room. And now if you have the numbers to back it up, labels will come go to an artist because it all depends on the audience that they are able to garner themselves.”

4.2.4. Sidhartha Pradeep (Independent Musician turned Film Composer)

“A shift has been observed in recent years, for movies and shows, an artist is composing music mainly for the situations and there is a greater prevalence of background score. we have very less songs, which has the actual lip sync, but we, we do have like situational songs. So, yeah, so that, that's a, that's a change, which I've noted from the independent space. Right now, with my interaction with filmmakers, I found that many are very open to new sounding, new experiments and new genres.

In the film industry, one gets to work with a wider range of genres because it's a huge space. It's a big space, and a musician gets the opportunity to be adapt with vast array of genres.”

4.2.5. Amira Gill (Independent Musician featured on OTT)

“Independent music birthed or gave rise to an opportunity in film. So, I would say independent work and social media were two catalysts for OTT work to happen. The first OTT project that had come to me was actually through Tajdar Junaid. So, we decided we want to work together in some capacity. He had heard my music. I obviously was a fan of his and I loved what he did and we connected on Instagram for the first time. Then he reached out to me and he said that there is a series coming out called 'Minus One' and I would love to work with you on it. He said that he wanted to work with an old Punjabi piece of poetry which he can add music to. Basically, he wanted to compose a melody, the music, anyway, he was doing and he said, I'd love for you to sing it and put the words into the melody. Or if the words are not suited, you can write them. So, I was really excited by that because it wasn't just the element of writing music, it was also coupled with a visual context. OTT was the platform, but the intention to work was already before that. Directors are realizing more and more that independent artists mean that they have their own identity, which is not influenced by somebody else. And the more authentic it is, the more value it has, the more fresh it is. People are hungry for it.”

4.2 Survey

The survey results are as follows:

Age group
110 responses

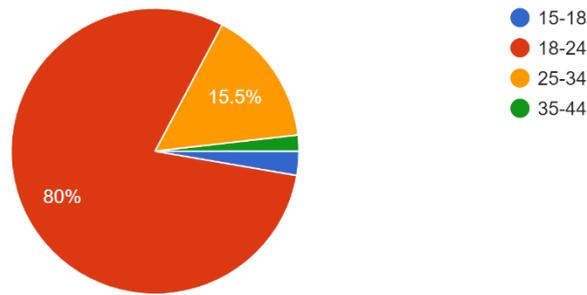


Fig 9. Age segmentation of the survey

Gender
110 responses

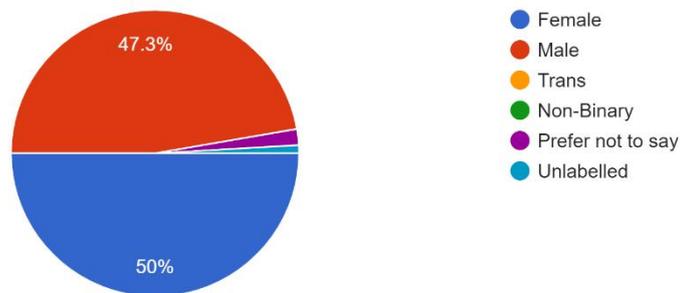


Fig 10. Gender segmentation of the survey

Education
110 responses

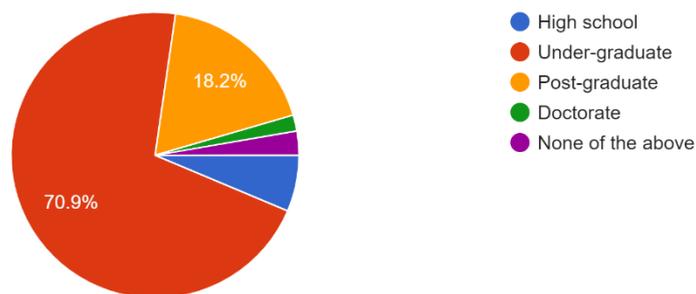


Fig 11. Education segmentation of the survey

Employment status
110 responses

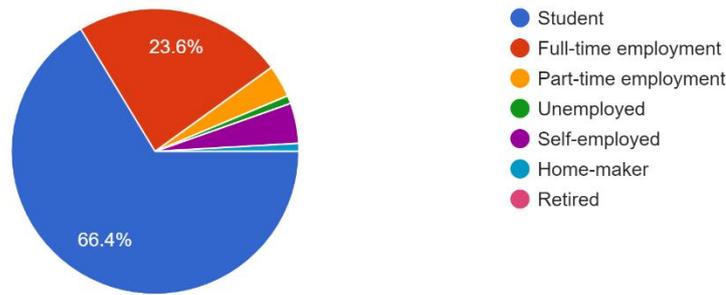


Fig 12. Employment segmentation of the survey

City of residence
110 responses

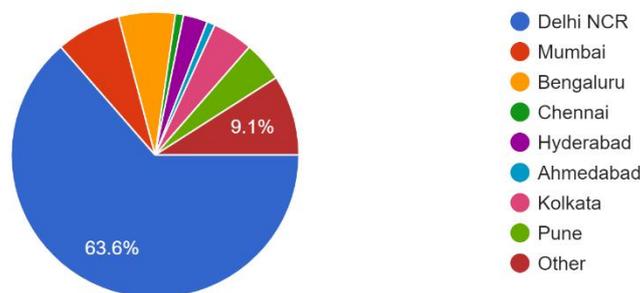


Fig 13. City of respondents' residence

Which OTT platforms do you use?
110 responses

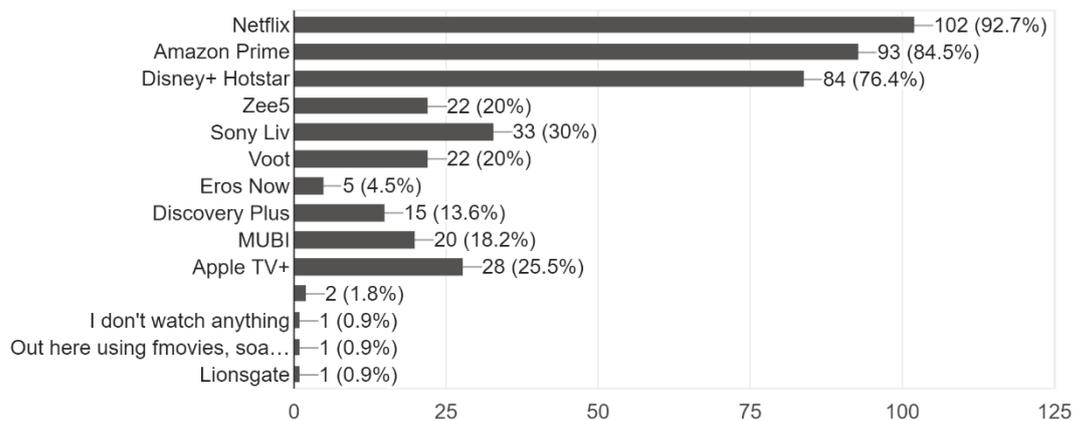


Fig 14. OTT platforms used by survey respondents

On average, how much time do you spend consuming OTT content in a day?

110 responses

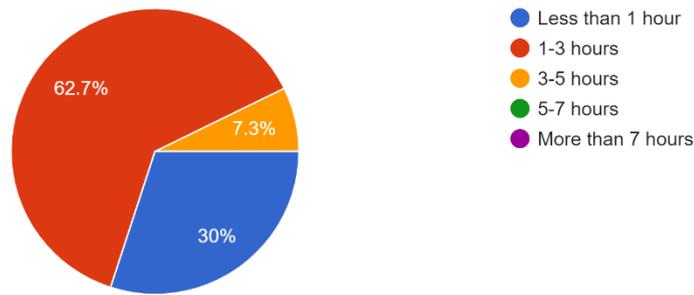


Fig 15. Time spent by survey respondents consuming OTT content

How do you discover new music?

110 responses

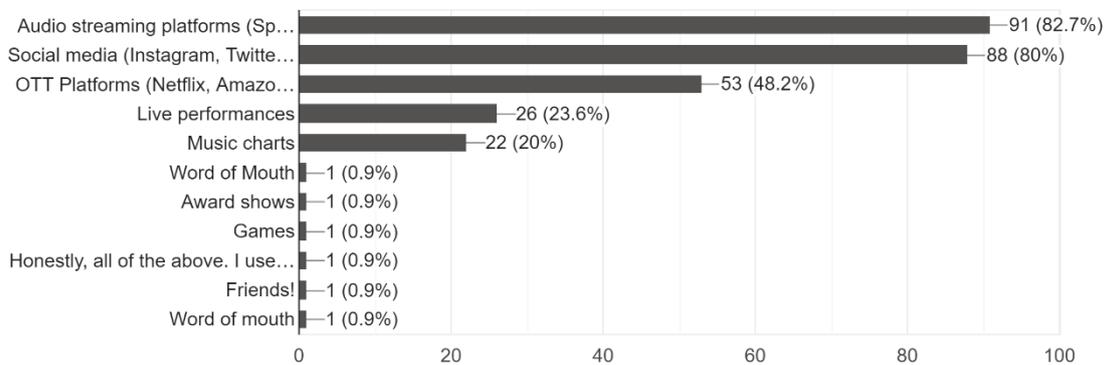


Fig 16. Ways in which the survey respondents discover new music

OTT platforms serve as a space for all kinds of musical artists to come together and showcase their work.

110 responses

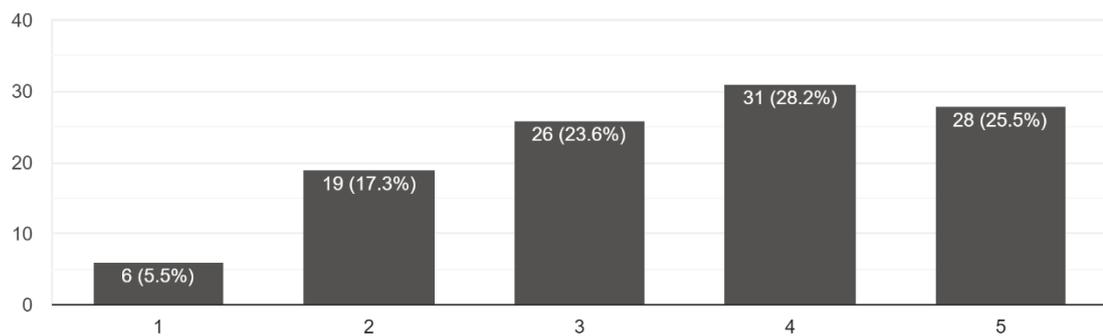


Fig 17. OTT platforms serve as a space for all kinds of musical artists to come together and showcase their work

OTT has played a role in shaping your taste and preferences towards music.

110 responses

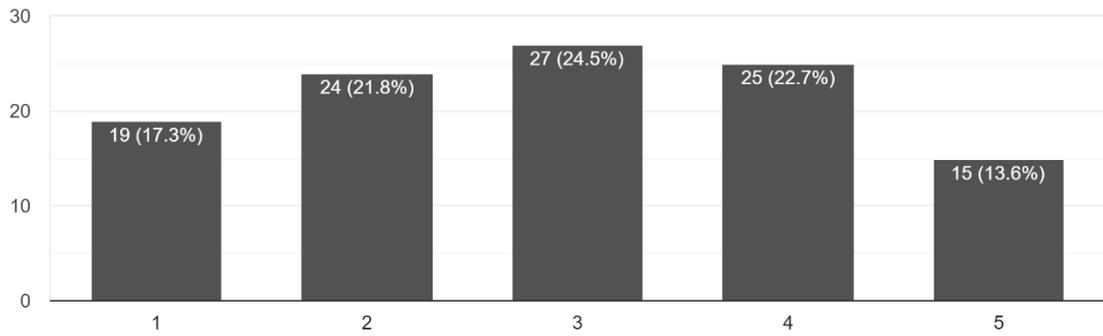


Fig 18. OTT has played a role in shaping your taste and preferences towards music

Do you think there is a rise in independent music on OTT platforms?

110 responses

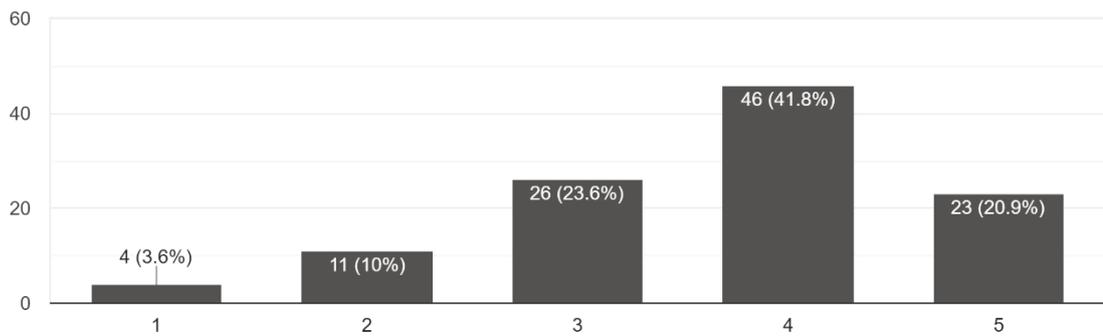


Fig 19. Rise in independent music on OTT platforms

What are the qualities you look for in the music you regularly listen to?

110 responses

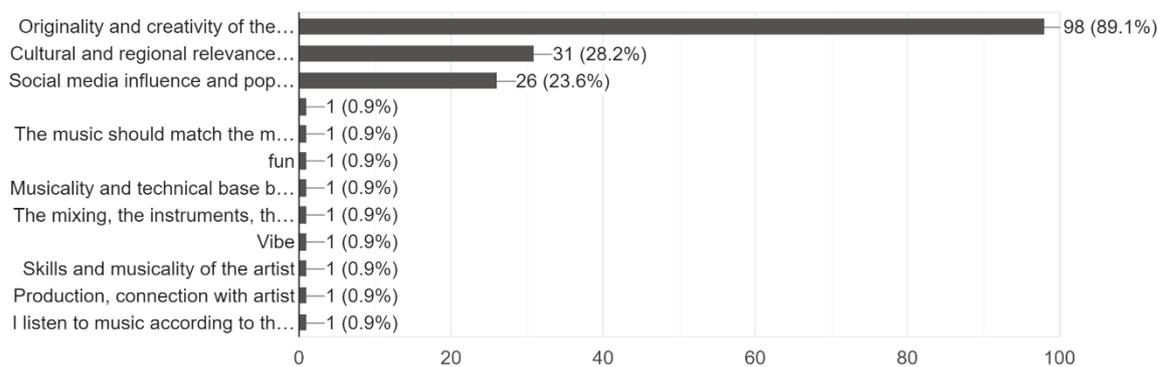


Fig 20. Qualities that survey respondents look for in the music they listen to

Which of the following musicians have you heard of?

110 responses

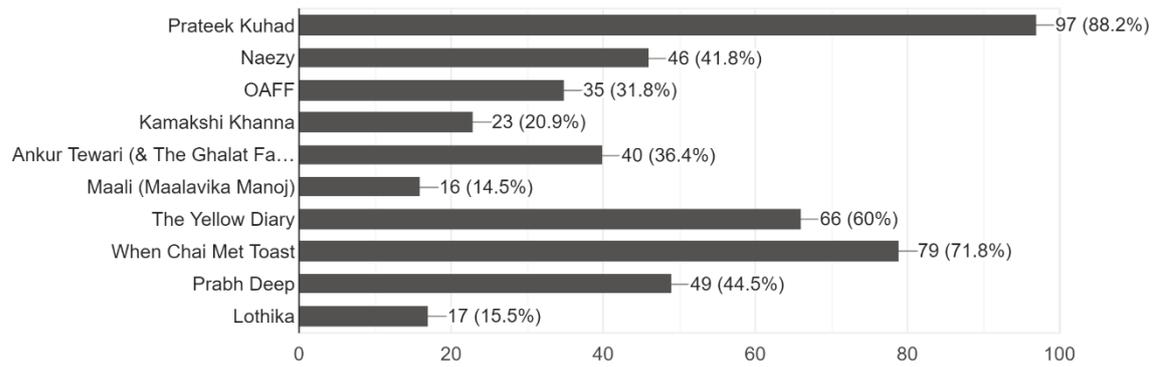


Fig 21. General awareness about independent music that have been featured on OTT

Are you familiar with Track 1?

110 responses

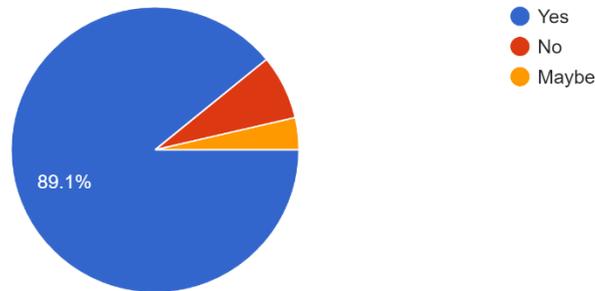


Fig 22. Audience Familiarity with Doobey from Gehraiyaan

Are you familiar with Track 2?

110 responses

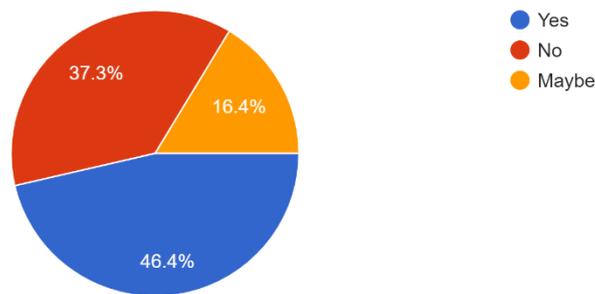


Fig 23. Audience Familiarity with Pause from Little Things

Are you familiar with Track 3?

110 responses

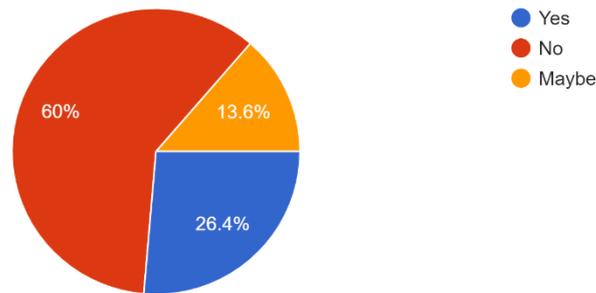


Fig 24. Audience Familiarity with Duur from Fame Game

IV. DISCUSSIONS OF THE RESEARCH FINDINGS

The interviews with industry experts, independent musicians and music journalists shed light on several important findings regarding the impact of the evolving digital content landscape on the independent music industry in urban India.

The in-depth interviews revealed that sync licensing is a novel concept in the Indian music industry. Filmmakers have different approaches when it comes to music acquisition for their projects. While some prefer exclusive compositions, others recognize the value of existing music and opt for synchronization agreements. This shift in mindset indicates a growing recognition of the importance of syncing the right story with the right song, reducing costs, and aligning the music with the visual context.

There has been an emphasis on the significance of licensing for Indian artists, particularly within platforms that cater to retail streaming. Licensing is considered a form of commercial exploitation, ensuring that artists are compensated for the use of their music. The increasing number of OTT platforms and diverse content offerings present opportunities for independent musicians to gain exposure and monetize their work.

It was also highlighted that language is not a barrier for independent artists in India, as many are releasing music in English. This opens up possibilities for introducing Indian music to the international market. The evolving digital content landscape and global reach provided by OTT platforms enable independent musicians to connect with a broader audience beyond geographical boundaries.

Crossovers between film and TV music and independent music, driven by the proliferation of OTT platforms are ever-growing with the advent of digital platforms. There is a growing demand for musicians, with increased content production, leading to more opportunities and visibility for independent artists. Collaborative and experimental approaches by filmmakers, ad-makers and content creators have resulted in a positive impact on the independent music segment. Music is now playing an integral role in storytelling within visual content, replacing traditional songs placed randomly in films. Directors are also increasingly recognizing the value of independent artists who bring their unique identity and authenticity to the table. Fresh and authentic music resonates with audiences and satisfies the growing appetite for originality.

These findings highlight the evolving dynamics between the independent music industry and the digital content landscape in urban India. OTT platforms are providing new avenues for independent musicians, enabling them to reach a wider audience, gain exposure, and monetize their work. Filmmakers are embracing collaboration with independent artists, acknowledging the value of authenticity and fresh musical expressions.

V. CONCLUSION

In conclusion, the Indian market has experienced a significant shift towards online streaming, with OTT platforms gaining immense popularity among consumers. The convenience, affordability, and personalized content offerings of these platforms have attracted a large number of users, making OTT apps one of the most downloaded categories. Factors such as increasing internet and broadband penetration, declining data charges, and the proliferation of internet-enabled mobile phones have contributed to the growth of the OTT market in India.

Moreover, the COVID-19 pandemic further accelerated the adoption of OTT platforms as people sought entertainment options during lockdowns and social distancing measures. This rapid growth has opened

up new opportunities for the independent music industry in India. Independent musicians, artists, and record labels have leveraged the internet and digital media to showcase their work and avoid major commercial music labels' fees while preserving their artistic freedom.

During this time, sync licensing has emerged as a novel concept in the industry, especially in India, allowing independent artists to collaborate with filmmakers and web-show creators. Filmmakers are now recognizing the value of independent music, leading to more experimentation, collaboration, and integration of music into the storytelling process. This shift has given rise to a more diverse and experimental soundscape in Indian shows, benefiting both filmmakers and independent musicians.

With the increasing number of OTT platforms and the demand for fresh, authentic, and unique content, independent musicians are gaining more visibility and financial opportunities. This trend signifies a significant change in the Indian music industry, where licensing and independent artists are becoming vital components. As the industry continues to evolve, it is expected that the Western approach of considering licensing and independent artists as the forefront of music creation will become the norm in India as well. Filmmakers and consumers alike are recognizing the value and potential of independent music, leading to a mutually beneficial relationship between the OTT industry and independent musicians.

VI. LIMITATIONS OF THE STUDY

The study's time frame may also be limited, preventing an in-depth analysis of long-term trends and impacts. The rapidly evolving nature of the digital content landscape may require continuous monitoring and analysis to capture the most up-to-date dynamics, which might be beyond the scope of this research.

Due to the limited resources and time constraints, the study might have a relatively small sample size, which may restrict the generalizability of the findings to a larger population. The research may focus only on a specific urban area or a particular group of independent musicians, limiting its applicability to the broader context of urban India.

Consequently, the research paper may primarily focus on the viewpoint of consumers, independent musicians, music journalists and business owners, neglecting other key stakeholders, such as filmmakers, content creators and record labels. Examining multiple perspectives could provide a more comprehensive understanding of the evolving digital content landscape's impact on the independent music industry.

VII. DESIGN BRIEF

Documentaries have emerged as a powerful medium for spreading awareness and provoking social change. With their ability to delve deep into real-life stories, explore pressing issues, and present unique perspectives, documentaries have the potential to inform, educate, and inspire audiences. This medium plays a crucial role in raising awareness about important issues, challenging existing narratives, and promoting dialogue.

Keeping the same objective in mind, a documentary, exploring how the independent music industry in urban India is being shaped by the evolving digital content landscape, was created. Through interviews with musicians, journalists, and industry experts, the film examines the opportunities and challenges presented by social media and OTT (over-the-top) platforms, and how they have disrupted traditional models of music distribution and consumption.

In the context of the independent music industry in the digital age, a documentary can provide an insightful exploration of this thriving sector. Plugged, the documentary, would revolve around capturing the transformative journey of musicians and artists who operate outside the realm of major commercial labels. It would delve into their creative processes, struggles, and triumphs, showcasing the significance of digital platforms and technology in reshaping the music landscape.

This documentary is specifically tailored for independent musicians and rising artists, with the primary goal of spreading awareness and equipping them with valuable resources to enhance their music careers in the digital age. By offering an immersive and comprehensive exploration of the independent music industry, the film aims to inspire and educate its target audience about the immense talent, resilience, and innovative approaches adopted by fellow independent musicians.

Moreover, the documentary aims to spark meaningful conversations and provide practical insights into leveraging digital media platforms to amplify their music, connect with audiences, and thrive in the ever-evolving digital landscape. By empowering independent musicians with knowledge, tools, and strategies, the film aims to equip them with the necessary resources to navigate the digital world effectively and leverage its immense potential for their musical journeys.

VIII. DESIGN VISUALS



Fig 25. Poster for Plugged – Independent music in the digital age



Fig 26. Still 1 from the documentary



Fig 27. Still 2 from the documentary



Fig 28. Still 3 from the documentary



Fig 29. Still 4 from the documentary



Fig 30. Still 5 from the documentary

IX. PR AND MARKETING PLAN

In order to amplify the film, a documentary release tour spanning college fest across Delhi, Mumbai and Bengaluru, to be organized. From panel discussions with students to Q&A sessions with industry professionals, this tour offers a unique opportunity to engage with the target audience and spread awareness about the film. Additionally, utilizing channels like Instagram, we will create buzz for the upcoming documentary while sharing resources and building a community.

10.1 Target Audience

Demographic:

- **Age:** 18-25 years old.
- **Education:** Undergraduate and post-graduates

Psychographic:

- Interested in music, films and digital content.

Geographic:

- **Location:** Delhi, Mumbai and Bengaluru.
- **Language:** English

Behavioral:

- Musicians and hobbyists.
- Active social media users.

10.2 Documentary Release Tour

A documentary release tour spanning college fest across Delhi, Mumbai and Bengaluru. From panel discussions with students to Q&A sessions with industry professionals, this tour offers a unique opportunity to engage with the target audience and spread awareness about the film.

The documentary release tour for "Plugged: Independent Music in the Digital Age" aims to captivate the college festival circuit in Delhi, Mumbai, and Bangalore over a span of 3 months. This carefully curated plan revolves around engaging with the vibrant and music-loving college community, creating awareness about the documentary, and generating buzz. The tour will feature exclusive documentary screenings at prominent college festivals in each city, followed by interactive Q&A sessions, panel discussions, and engaging sessions with industry experts and independent musicians. Leveraging the power of social media, local networks, and partnerships with music societies and student organizations, the tour will strive to maximize reach and impact.



Fig 31. Documentary Release Tour

10.2 Social Media Community

Using channels like Instagram, we will generate excitement for the upcoming documentary while sharing resources and building a community.

By extending its influence beyond the physical tour, the documentary team will continue online promotions, maintain a strong social media presence, and explore avenues for wider distribution. Through this comprehensive approach, "Plugged: Independent Music in the Digital Age" seeks to ignite conversations, inspire young minds, and foster a deeper understanding of the thriving independent music scene in the digital era.

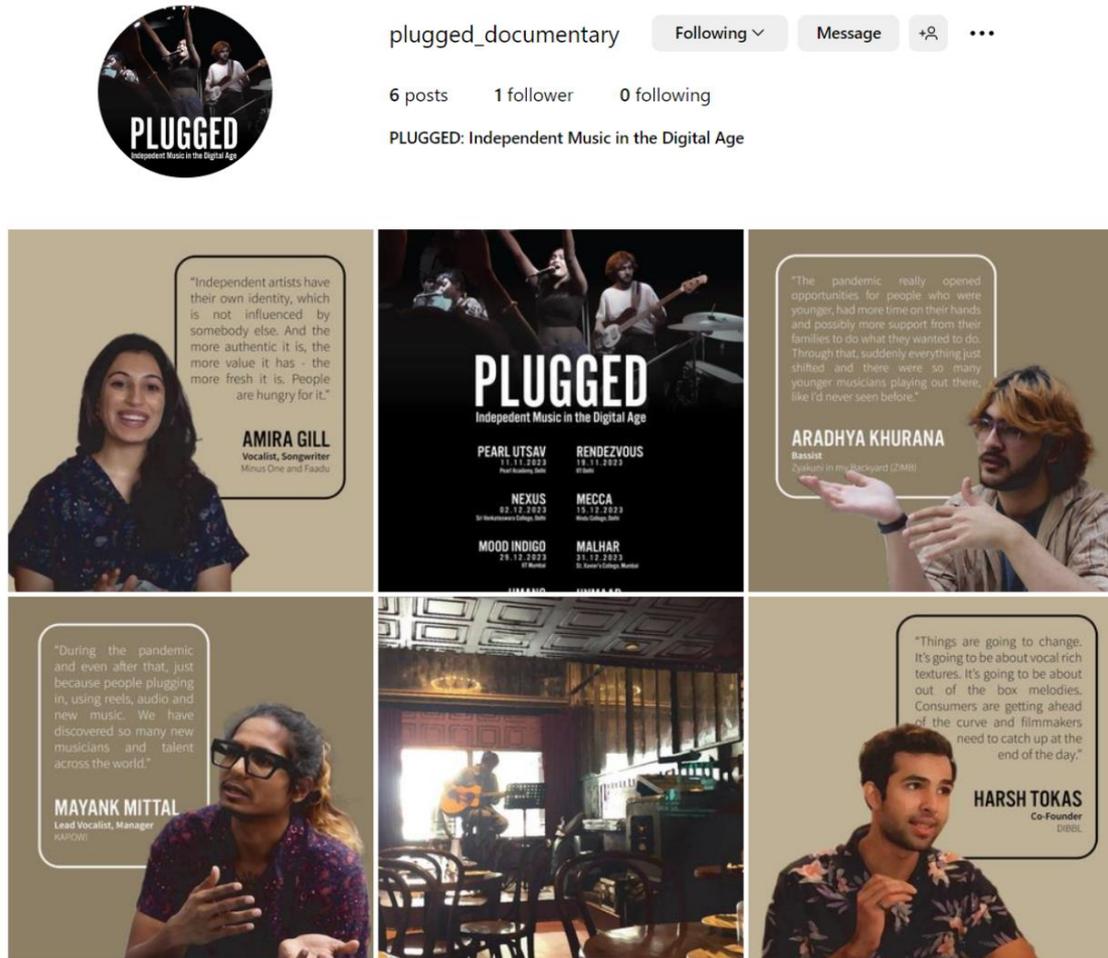


Fig 32. Social Media Page

X. FINANCES

Expenses	For 1 day	For 10 days
Invitations	5,000	50,000
Out-of-Home (OOH) Advertising	15,000	1,50,000
Social Media Marketing	20,000	2,00,000
Panel Speakers (Independent Musicians & Industry Experts)	50,000	5,00,000
Venue Rental (College Festival)	30,000	3,00,000
Technical Requirements	20,000	2,00,000
Miscellaneous	5,000	50,000
Total	1,45,000	14,50,000

Table 1: Expenses for Documentary Release Tour and Social Media Marketing

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