The Untold Potential of India's Informal Music Industry

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Acknowledgements

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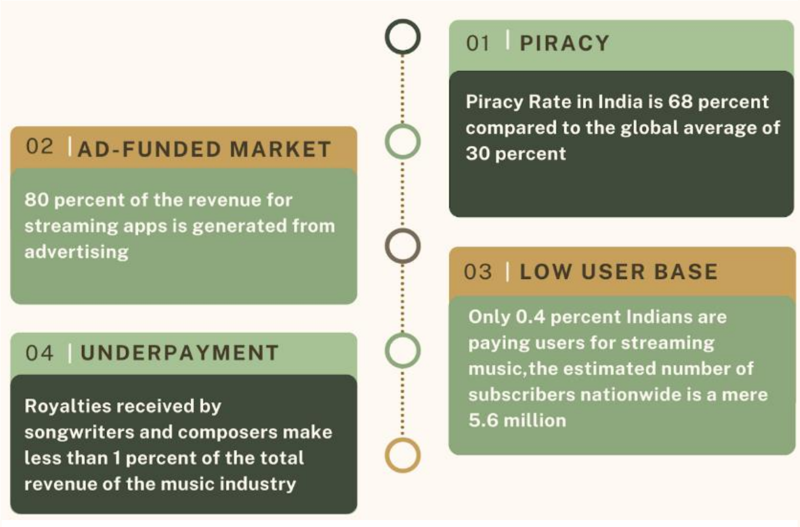
1. Value gap in a transforming industry

The music industry in India has not realised its potential. While the estimated value of the global music industry is USD29 billion,[1] the industry in India is valued at approximately USD234 million,[2] or INR18.7 billion as estimated by EY-FICCI's 2021 report on India's media and entertainment industry.

Figure 1: Explaining the Value Gap in India's Music Industry



Source: IMI-IFPI Digital Music Study Report, 2021; Goldman Sachs Music in the Air report, 2020; Compiled by authors

According to the IFPI Global Music Report 2022,[3] the corresponding numbers are USD25.9 billion and USD219 million for the global and the Indian industry respectively. India does not feature among the top 10 music markets in the world.[4] This is despite the steep rise in revenue (20.3 per cent) in 2021.[5] India lags behind because of the long-standing challenges of underpayment by consumers of music, rampant sale and consumption of pirated content, massive digitisation and an ad-supported streaming user base. (Figure 1). Unlicensed streaming and web downloads are the most popular forms of music piracy in the country.[6] While India adopted a large part of its copyright law and policies from the US and Europe, industry practices did not follow through, leading to poor revenue realisation and a mounting pile of industry disputes. An average Indian listens to 21.9 hours of music in a week as against the global average of 18.4 hours.[7] Despite its intrinsic presence in our everyday lives, the music industry in India remains unrewarded.

Music creation as well as consumption have seen sharp shifts with digitalisation. 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 democratisation of an industry largely driven by big record labels and the film

1 Statista, Music Business Worldwide
2 At USD 1 = Rs. 79.9
3 IFPI Global Music Report 2022
4 Firstpost. 2022. *A look at the current state of the Indian music industry*. [online] Available at: <https://www.firstpost.com/art-and-culture/why-india-might-grow-as-a-music-market-but-wont-thrive-and-break-into-the-worlds-top-ten-10618121.html> [Accessed August 4, 2022].
5 Ibid
6 MUSO; Stassen, M., 2022. *Music piracy has plummeted in the past 5 years. But in 2021, it slowly started growing again*. [online] Music Business Worldwide. Available at: <https://www.musicbusinessworldwide.com/music-piracy-plummeted-in-the-past-5-years-but-in-2021-it-slowly-started-growing-again/> [Accessed August 4, 2022].
7 IMI-IFPI Digital Music Study Report, 2021

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. Film music is estimated to contribute around 65 per cent to the industry revenue.[8] There is also transformation on the demand side. Technology has drastically lowered the costs of consumption and simultaneously expanded the breadth of music available to listeners in India (Figure 2). Music is now streamed digitally, and not played on owned discs, cassettes or CDs. Almost any song from any genre, region or era is now available on streaming platforms. YouTube led this transformation with free access to its platform. Even today, YouTube remains the most preferred streaming platform for India, representing 22 per cent of the total time spent by Indians listening to music.[9] YouTube also accounts for 50 per cent of music consumption for record labels.[10] This trend has been aided by the rise of low-cost smartphones, and the availability of ultra-cheap data plans. Digitalisation, however, has not had a similar impact on the other, often overlooked segment of the music industry, i.e., the informal industry, which comprises brass bands, local DJs, independent performers or live bands, music teachers, instrument manufacturers, etc.

Figure 2: Technological Developments and Music Consumption in India

INNOVATION	YEAR	IMPACT	AFFORDABILITY
RADIO	1927	Pan-Indian medium for music consumption. Still remains widespread in rural and urban areas.	Everyone has access through car stereo and FM radio apps.
VINYL	1958	Limited music storage. Luxury good.	High cost for both vinyls and vinyl players.
AUDIO CASETTES	1970	Popular, portable, easy to repair.	Low-cost and long shelf -life.
CD	1990	First combination of digital and physical medium. Portable. Could store hundreds of songs.	Very low-cost, could be played through multiple means (Desktop, CD player, Laptop).
MP3 PLAYERS	2000	Short-lived (due to smartphones). Could store thousands of songs.	Relatively expensive, most of the downloaded music was pirated.
MUSIC STREAMING	2010	Unlimited access to every genre of music. Available on every smartphone.	Mostly free, paid versions (without ads) start from as low as 99 INR

Source: Compiled by authors

8 Industry discussions
9 IMI-IFPI Digital Music Study Report, 2021
10 EY-FICCI Media & Entertainment report, 2022

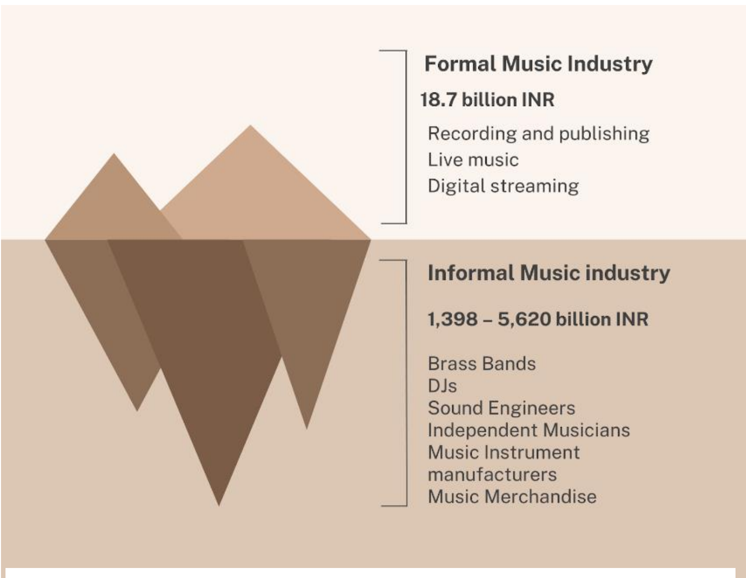
The Covid-19 pandemic had a massive impact on the music industry in India and imposed a disproportionate burden on the informal sector. It halted every conceivable activity including live performances, weddings, religious and social processions, production of films and music videos, etc. Forty to forty-five per cent of live business enterprises shut down permanently during the pandemic.[11] However, prolonged 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 monetisation. 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.

Popular industry estimates do not take into account the informal sector. The real numbers and size of the informal music industry remain largely unaccounted for with fragmented components and activities that are challenging to estimate. The informal sector of the Indian music industry comprises a variety of stakeholders including but not limited to brass bands, DJs, sound engineers, independent artists, folk musicians, independent music teachers, music instrument manufacturers, workers (*kaarigars*) and helpers in the industry. These large numbers of stakeholders remain invisible in most assessments of the industry and the revenue they generate remains unreported. The heterogeneities in income levels, size of entities, nature of work, scale, and seasonality make industry estimations of revenue and employment a complex exercise. ***Our report provides the first estimate of the size of the informal music industry in India.***

2. The industry iceberg and its hidden informal sector

We estimate that the informal music industry in India ranges between INR1398 billion to INR5620 billion. The popularly available estimates for the music industry, primarily focused on the formal sector, are miniscule in comparison and reflect just the tip of the industry iceberg. According to our estimates, the informal industry is a source of livelihood for almost 14 million people including DJs and their helpers, brass band members, sound engineers, independent artists, musicians, teachers and

Figure 3: The Hidden Informal Sector



Source: EY-FICCI and Author Estimates

[11] Industry discussions

small-scale manufacturers. Our estimates are based on the triangulation of data from a multi-city field survey of 1,574 individuals, including members of 255 brass bands, 207 DJs, 201 sound engineers, 234 independent music teachers, and 677 independent artists.[12] Additionally, we relied on industry associations' data intelligence for city-wise numbers of brass bands and DJs, which were extrapolated to the state level to arrive at all India employment numbers. Finally, our independent stakeholder discussions provided the depth of information on each sub-group that was useful in verifying the estimates and building a narrative for this report.[13]

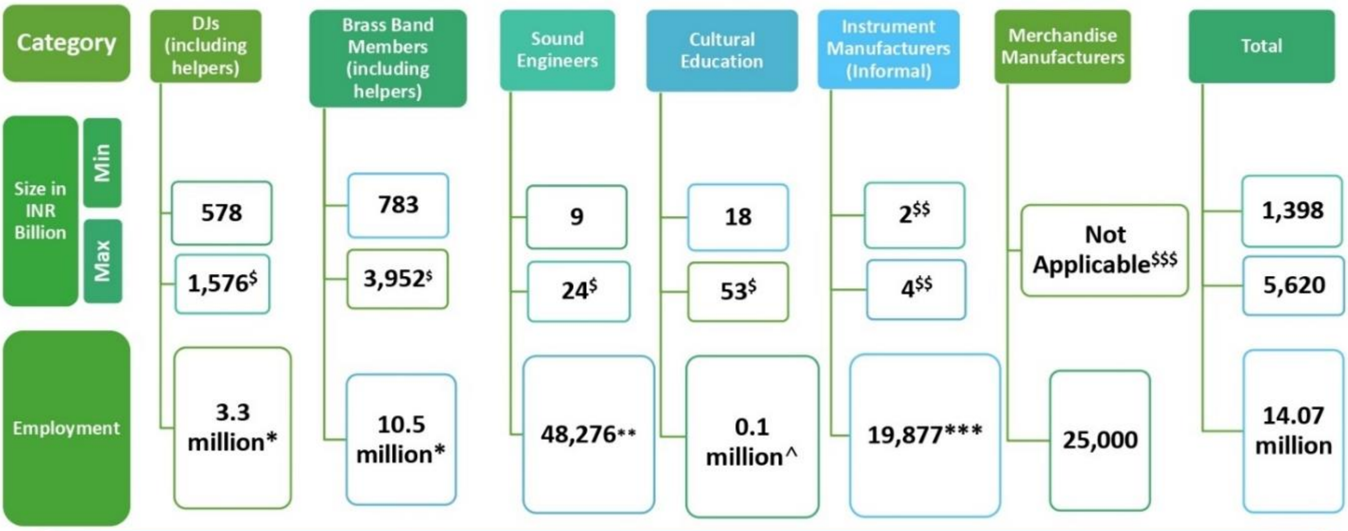
Figure 4 provides a range of estimates on the size of each sub-group as well as the corresponding numbers for employment. All assumptions used for the estimation and the secondary sources of data are provided alongside. Using range values helps to deal with the usual challenges of migrant, seasonal and part-time involvement in any informal sector. There are huge variations in the reported numbers of brass band members, DJs and independent musicians from the field, depending on when the data is collected. This is also true of their earnings and the potential to find gig opportunities. We reflect more on these factors in Section 3 of the report. Data on merchandise manufacturers were not available, though these are quickly becoming an important product and service provider in the music industry, both formal and informal. We provide a qualitative summary in Section 3.

The numbers estimated through this study emphasise the magnitude of the music industry, both in terms of income and the number of people engaged in it, hitherto unknown or unacknowledged. Even at the lower bound, the numbers are large enough to be considered important for policy discussion.

Even sub-groups such as brass bands and DJs employ or partially employ more people than absorbed by the railways (1.25 million)[14] or the Indian government (3.5 million).[15] In comparison to other sectors such as telecom, which is relatively more organised and corporatized, and textiles, which leans towards informality, the estimates for the music industry do not look insignificant (Figure 5). While government policy focuses on both the telecom and textile industries for the growth dividends they offer, the music industry has remained on the periphery in the overall economic agenda for the country.

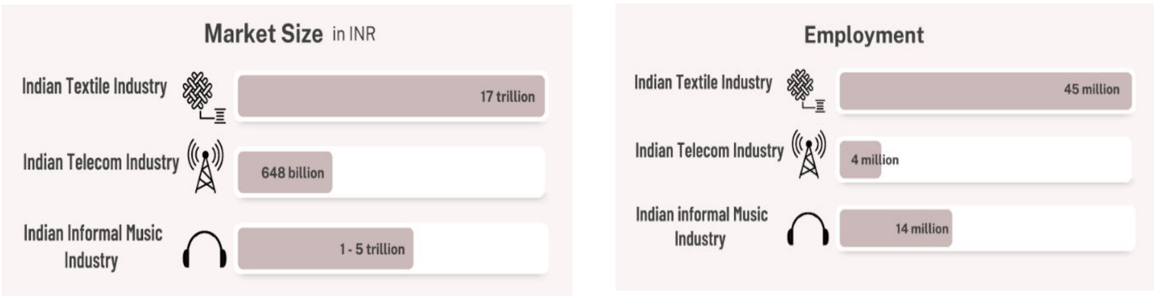
12 Please refer to Appendix 3 for the sample profile
13 Refer to Appendix 2 for more details on the methodology
14 Indian Railways Annual Report & Accounts, 2020-21
15 Union Budget for 2022-23

Figure 4: Size of and Employment in India's Informal Music Industry



* The employment numbers have been calculated using the data collected by IMI for cities in 21 states/UTs. These numbers were scaled up using the ratio of town level data to total population of the state from Census 2011. For states where data was unavailable, we use population proportions to extrapolate employment numbers. Other indicators such as per capita income and services share of GDP are weakly correlated with number of DJs/brass bands.
** Numbers are taken from PLFS 2019-20 (NIC Code 5920 for sound recording and music publishing).
^ Numbers are taken from PLFS 2019-20 (NIC Code 8542 for Cultural education).
*** Numbers are taken from PLFS 2019-20 (NIC Code 3220 for Manufacture of musical instruments).
$ These numbers have been estimated using ICRIER's survey responses conducted in 2022. Range was calculated using weighted averages of the income intervals (bounds) and then multiplied by the total estimated employment to arrive at the income.
$$ These numbers are based on the inputs provided by music manufacturers during FGDs and IDIs.
$$$ This is a new and evolving industry. No clear estimates are available. Employment of 25000 people was indicated by an industry representative.

Figure 5: India's Informal Music Industry Versus Other Sectors

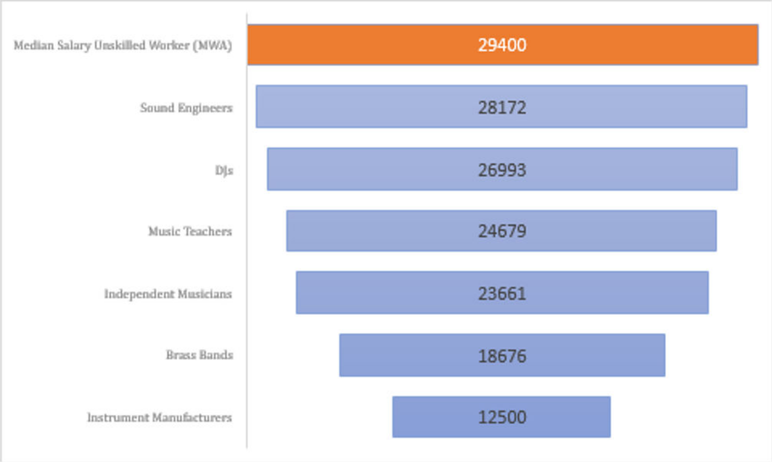


\Source: *Compiled by authors from Textiles Industry Report, IBEF; Telecommunications Industry Report, IBEF; Economic Times,*[16] *ICRIER estimates*

16 ETTelecom.com. 2022. *In-depth: Making sense of India's telecoms job market*. [online] Available at: <https://telecom.economictimes.indiatimes.com/news/in-depth-making-sense-of-indias-telecoms-job-market/85477392> [Accessed August 4, 2022].

We argue that the estimates for the informal music industry indicate a need for policy intervention with respect to improving livelihood opportunities for the sector, providing social security to vulnerable groups and nurturing its overall growth perspective. In Figure 6, we present, based on our survey, the estimated average monthly income of different sub-groups within the informal music industry, which is lower than the median salary of an unskilled worker under the Minimum Wage Act, 1948.[17]

Figure 6: Average Income of Subgroups within India's Informal Sector



Source: Author Estimates and Khatabook

The growth of this industry is not only for itself but also for several allied sectors that rely heavily on music for their growth. Music provides an immersive experience to online gamers. The sound tracks become an important part of the story telling process in a game setting.[18] The hospitality industry relies heavily on music and entertainment to offer a wholesome experience to their clients. In fact, music is now used across sectors as a marketing strategy by new age brands. Individual original tracks, music albums and often events are used to build positive brand associations.[19] Music is now at the centre of international diplomacy. Bollywood music resonates with people across the world. It is also reflected in our diplomatic engagements with several countries, particularly Pakistan, with whom we share a cultural heritage.

Estimating the potential of music and understanding the challenges that artists and the overall industry face will nudge policy towards realising growth. We present specific policy recommendations in Section 4.

[17] https://khatabook.com/blog/know-about-average-salary-and-wage-in-india/

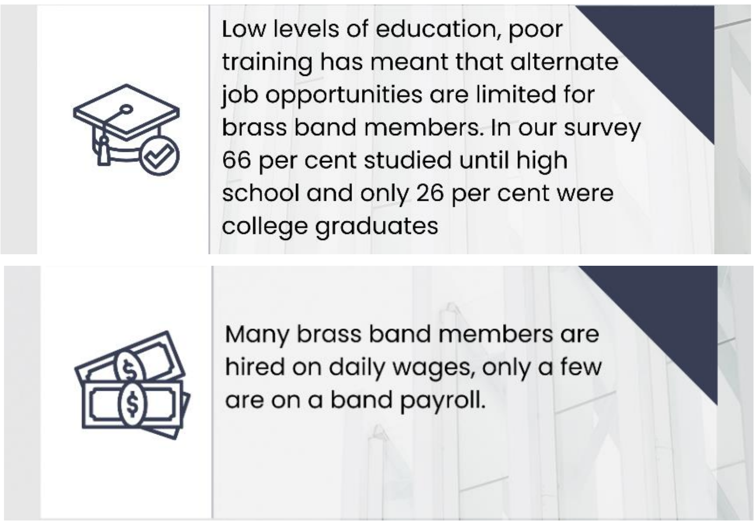
[18] 2022. *The Importance of Music in Video Games*. [online] Anara Publishing. Available at: <https://www.anarapublishing.com/the-importance-of-music-in-video-games/#:~:text=Music%20is%20a%20tool%20that,more%20immersive%20experience%20than%20film> [Accessed August 4, 2022].

[19] cnbctv18.com. 2022. *Brands create original music to make consumers dance to their tunes*. [online] Available at: <https://www.cnbctv18.com/storyboard18/storyboard18-brands-create-original-music-to-make-consumers-dance-to-their-tunes-11745882.htm> [Accessed August 4, 2022].

3. Sectoral Analysis – Common Challenges of Low Skills, Low Wages and Inadequate Training

In this section, we analyse each component of the informal music industry to explain the trends, challenges and opportunities that are not captured by the estimates presented in Section 2. The analysis is based on feedback received from the field survey, individual in-depth interviews and focus group discussions conducted with different stakeholder groups.

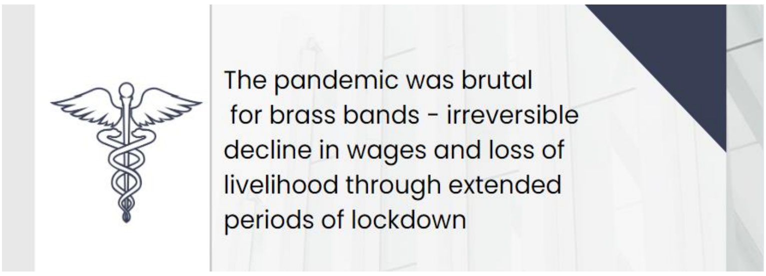
3.1 Brass Bands

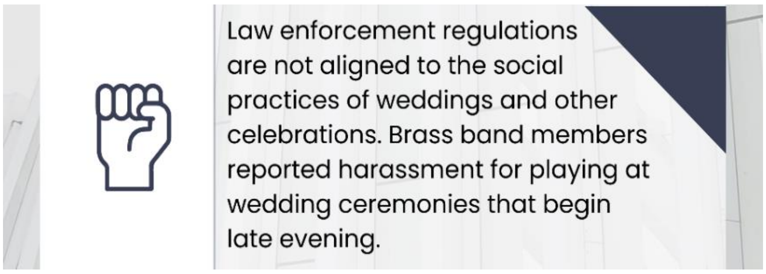


Brass bands[20] remain an integral part of the Indian music tradition, but are not captured by mainstream estimates of the music industry. A staple at almost every Indian wedding, irrespective of size and location, bands are still identified by their traditional use of trombones, saxophones, trumpets, etc. Brass bands in India also perform at other cultural and social events, election rallies and religious processions. Most performances are live. Less than 6 per cent of the brass band members interviewed in our survey recorded or published their performance. The concentration of brass bands differs across regions, but they are present in almost all parts of the country. There are at least a few bands in every district, if not every village in India. While they have traditionally provided employment to many individuals in the informal sector, they remain extremely vulnerable to external shocks, such as the Covid-19 pandemic. As per our estimates, the total employment generated by brass bands is approximately 10.5 million including musicians, helpers and other workers. Bands vary in size and can consist of 10-60 people, each playing a specific instrument. It also consists of a master or conductor, usually leading the brass.

[20] The brass bands mentioned in this report differ from the official formal bands of the armed forces (e.g., Navy band).

Brass bands see seasonal demand and are often vulnerable to income shocks. Livelihood opportunities are linked primarily to the wedding season. Most bands operate through a small shop, where the owner sits and negotiates rates with customers. A significant number of brass band members (60%) work for only about 3-5 months in a year, with their demand escalating only during the wedding seasons in the year. In our survey, the reported number of performances during the wedding season varies between 10 and 15, while the off-season performances range from 5 to 10 in a month. This number has been dwindling in recent years with many people preferring DJs over brass bands for weddings.





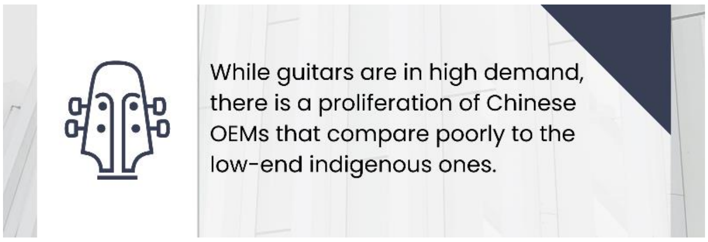
Brass band members are often compensated in both cash and kind. According to our survey, almost 70 per cent of the brass bands received their entire compensation in cash, while the remaining 30 per cent were provided accommodation, food, etc., as part of the compensation package. Apart from the direct cash payment they receive, brass bands also receive tips. Monthly earnings for a brass band member range from a meagre INR6,000 to INR31,000. Their low income forces them to supplement their primary earnings with other activities, especially in the off-season. The other source of income for a minor section of brass band members (12 per cent in our survey) is through selling old equipment and instruments. Brass bands have not adapted to the rapid digitisation of music and this has led to a decline in their overall revenue.

Brass band members depend on learning by doing, with limited professionalisation and quality training. Most brass band members are high school graduates (66 per cent) and only about 26 per cent complete college education. The lack of skilling limits their potential to adapt to technological changes in the music industry or secure jobs offered in alternate music related professions.

The future of brass bands in India remains uncertain; we can only guess how long the lure of traditionality will keep them alive.

3.2 Instrument Manufacturers

Very much like other industry clusters, instrument manufacturers in India are found mostly in the cities of Meerut, Kanpur and Kolkata.



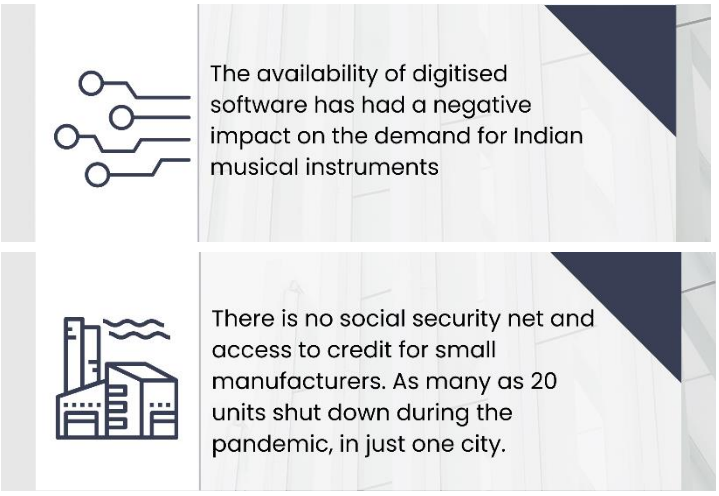
Kolkata is the biggest domestic manufacturing hub for guitars as well as other musical instruments. Meerut is the main centre for the manufacture and assembly of brass band instruments. As for other cities, Kanpur is the home for harmoniums, Amroha for *dholaks* and Chennai for drums. In comparison to the estimates presented for the informal sector, which are usually proprietorship firms or individual *kaarigars*, the formal organised industry is very small. According to data from the Annual Survey of Industries, an estimation of the formal manufacturing sector in India, music instrument manufacturers comprised 19 firms with a total of 331 employees generating INR19.3 crore.[21]

There is a visible decline in the demand for Indian musical instruments but rising demand for guitars and keyboards. The introduction of low-cost electronic instruments such as the electronic *tabla* and *tanpura* has led to a marginal decline in the demand for Indian musical instruments. On the other hand, despite its rising cost, the demand for guitars has overshot that for all other instruments. The market is segmented into guitars for beginners and professionals, the latter being branded and high-priced. Yamaha, Gibson and Fender are some of the popular brands in India. Self-learning individuals opt for indigenous and low-cost guitars. The Indian market is driven by imported guitars (40 per cent), both for high-cost branded guitars as well as low-cost ones, with a preponderance of Chinese original equipment manufacturers (OEMs).

Like most other sectors, instrument manufacturers were severely affected by the pandemic. With schools and educational institutions – the regular buyers of musical instruments accounting for 30 per cent of total sales – shut for almost two years,[22] manufacturers saw significant losses. In markets like Meerut, it led to over 20 small manufacturers shutting down.[23] The pandemic related decline in demand coincided with increased raw materials costs and the imposition of an 18 per cent goods and services tax (GST). Most manufacturers have not recovered from the double blow of demonetisation and Covid-19 even today. A constant woe related to their financial viability and survival include lack of access to credit from the formal sector.

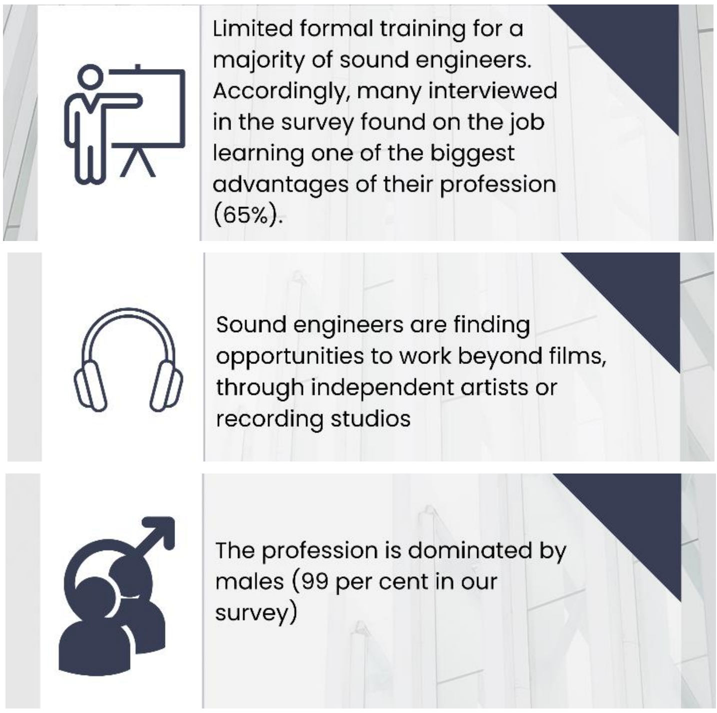
21 Annual Survey of Industries
22 Industry discussions
23 Industry discussions

Instrument manufacturing remains largely traditional, though manufacturers are exploring avenues for modernisation through e-commerce. A large number of the manufacturers trace back their business to the heritage of their grand and great grandparents. While some manufacturers are engaged in building specialised instruments, others simply procure parts and assemble instruments. While the overall wages for the sector remain low, specialised *kaarigars* are always in demand.



With changing market trends, manufacturers are exploring the e-commerce channel to sell products. According to manufacturers interviewed during the focus group discussions, a digital presence provides visibility, with more enquiries on products. However, for instruments, most customers physically check the instrument before buying it. Moreover, transportation services provided by popular e-commerce platforms come with high risk of damage. Besides, the sizeable commissions charged by e-commerce platforms squeeze the manufacturer's margins.

3.3 Sound Engineers



The demand for sound engineers has increased over time. While sound engineers have been around for a very long time, digitisation of music composition and the rise of independent artists have led to a steep rise in the demand for sound engineers. As per our survey and industry interactions, the profession remains heavily dominated by young males (99 per cent are men and 59 per cent are in the age range of 26 to 35 years, as per our survey). Around 44 per cent of the respondents had been working as sound engineers for the 5-10 years prior to the survey and about 33 per cent for less than five years, underlining the relative predominance of youth among these professionals.

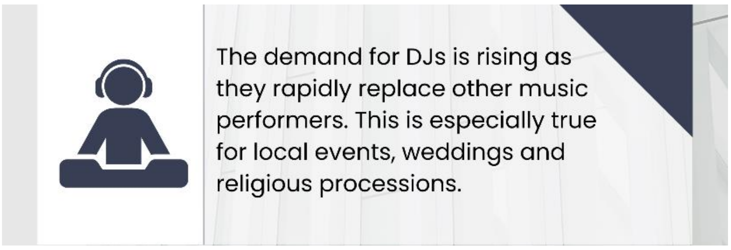
There is need to improve the overall quality of sound engineers through formalised training programmes. According to our survey, only 10 per cent respondents had training from specialised music schools, while 27 per cent learnt on the job and the remaining had some informal training. Over time, courses offered by institutions such as the Film and Television Institute of India (FTII), the National Institute of Film and Fine Arts (NIFFA) and Sri Aurobindo Centre for Arts and Communication have made it easier to become a sound engineer. There are more than 10 institutes for sound engineering in the state of Delhi alone, from which more than 700 students graduate annually.[24] Despite this significant turnout, a large number of sound engineers have no formal specialised training and they depend on learning on the job. This also impacts their ability to negotiate higher wages or move to allied sectors that pay better.

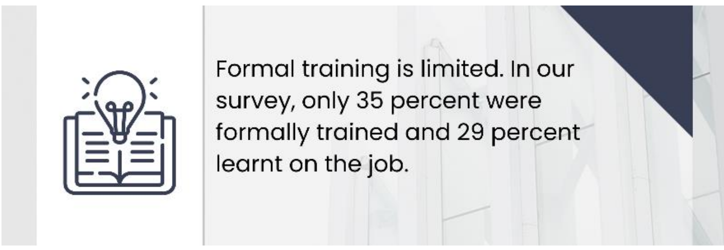
Sound engineers are finding opportunities beyond films. Sound engineers compose and (often) produce music for jingles, films, documentaries, theatre, podcasts, etc. They work with many independent artists, studios, record labels, and other commercial clients. Formerly, commercial engagements were limited to recording studios and record labels. The changes led by digitisation in music composition and production have meant more opportunities for sound engineers to work independently and part time with bands and individual artists. In Delhi itself, the estimated number of recording studios has increased by between 1200 and 1400.[25] However, the number of recording labels do not reflect any sharp increases.

Sounds engineers are also vulnerable to low and irregular income. Almost 40 per cent of the respondents said that lack of regular income was one of the biggest disadvantages of working in the music industry. Our survey found that 43 per cent of the respondents earn less than INR50,000 per month and 48 per cent earn less than INR25,000 per month. The average monthly income for sound engineers ranges from INR16,000 to INR41,000. Less than 5 per cent of the respondents paid income tax. Many sound engineers working in the live music industry were affected by the pandemic, leaving them jobless for an extended period of time.

3.4 DJs

DJs are popular and ubiquitous. DJs or disc jockeys are a relatively new addition to the Indian music industry, but have quickly become ubiquitous to the Indian entertainment landscape. Their gigs span across weddings, election rallies, religious p rocessions, clubs, bars, restaurants, music festivals and live concerts, as well as full-fledged music tours. They have expanded the pie for the





24 Industry discussions
25 Industry discussions

industry as well as eaten into the share of other traditional segments such as brass bands, the century old tradition at Indian weddings. Given the demand, the number of DJs have also increased significantly. Data collected by music associations find that almost all cities and districts in India have DJs. DJs, depending on their scale, also hire helpers. Many DJs not only perform at events or play live music, but also routinely publish their work online on platforms such as YouTube. The growth of DJs can be attributed to the rapid digitisation of music.

Most DJs are not formally trained and consequently, inadequately compensated. Thirty-five per cent of the respondents in our survey said they had not received any formal training to become a DJ; 29 per cent said they learnt music mixing online or on the job. Like sound engineers, DJs are very young – almost 80 per cent in our sample were less than 35 years old. While DJs have proliferated across the country including in small towns, they are poorly compensated. The average monthly earnings for DJs range from around INR14,000 to INR39,000 with more than half (56 per cent) earning less than INR25,000 per month.

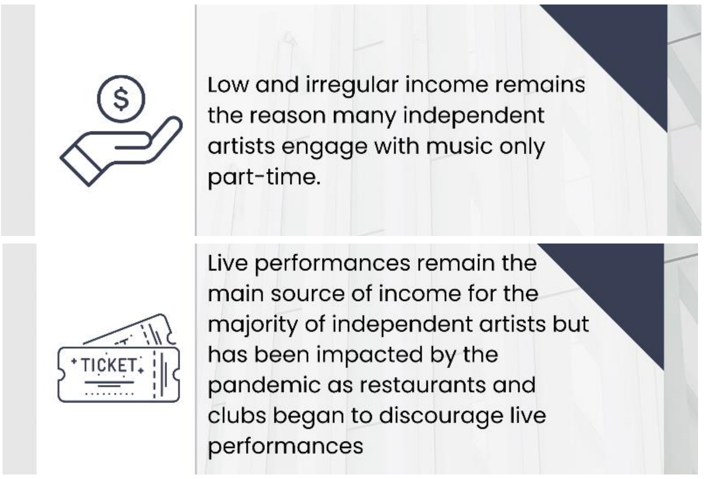
There is a market for high-end DJs. Clubs and pubs are a major venue for high-end DJs who are found performing at concerts, music festivals, restaurants and weddings. DJ centric music festivals such as Sunburn had an attendance of around 600,000 people before the pandemic.[26] The income for this group of DJs is significantly higher than the industry average, though their businesses were also affected by the pandemic as the live performance industry came to a standstill. While some popular DJs moved to online performances during the pandemic,[27] most agree that there is no sustainable alternative to live, in-person performances.

3.5 Independent Musicians

[26] DJMag.com. 2022. *The true story of how India partied through Covid-19*. [online] Available at: <https://djmag.com/longreads/true-story-how-india-partied-through-covid-19> [Accessed August 4, 2022].

[27] Outlook India. 2022. *Impact of coronavirus pandemic on EDM industry in India*. [online] Available at: <https://www.outlookindia.com/outlooktraveller/explore/story/70908/impact-of-coronavirus-pandemic-on-edm-industry-in-india> [Accessed August 4, 2022].

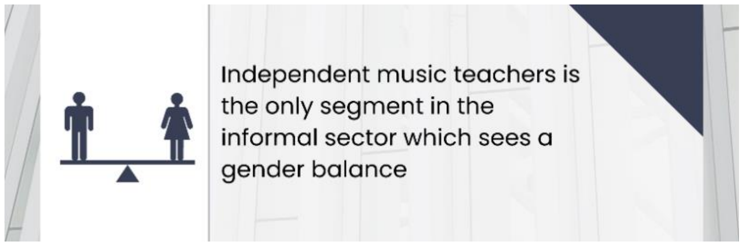
Digitisation has enabled the rise of independent musicians. The proliferation of software and other enabling applications have aided the rise of independent musicians. Music composition, publishing and distribution have become cheaper and easier with technology and digitisation. The entire process of mixing, optimising, 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. Inadvertently, it has negatively affected the demand for specialised instruments and instrument players as one can simply use software and applications to produce a variety of sounds, tunes and music pieces. For distribution, most artists in the past would have to approach a record label. However, with the advent of digital distribution companies (e.g., TuneCore), it has become possible for independent musicians to publish their music on streaming services such as Spotify, JioSaavn, Apple Music, etc., without going through a record label. The average cost of creating and publishing a song may range from INR 20,000 to INR 2,00,0000.[28] 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. Newer forms of music consumption such as live streaming of music and short form video apps (Tik Tok) have forced musicians to actively engage with these platforms as well as customise their music to these platforms. The role of influencers and marketing merchandise are also becoming very popular. A large number of mainstream artists have also started to release music merchandise. Music communities and opportunities to perform at small events remain limited to metros and Tier-1 cities.

[28] Industry discussions

The industry does not offer the luxury of full-time regular employment to most artists. A large number of independent artists depend only part-time on the music industry. The challenges of irregular income, increasing competition and economic shocks discourage independent artists from pursuing music full time. Many artists stated that music is not a viable career option. Even where online publishing options are available, unless one is a mainstream artist, platforms such as Spotify or YouTube, with their low per stream revenue, do not serve as a stable income source. For most artists, especially in the traditional music segment, institutional support is lacking and it rides on the success of a handful of artists.

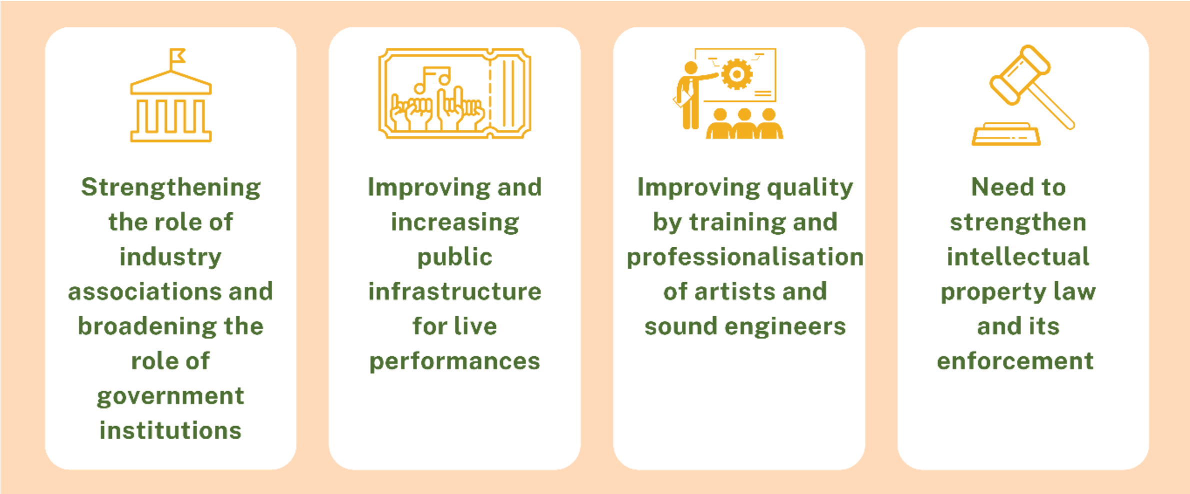


4. Conclusions and Policy Recommendations

The report provides insight into India's informal music industry that has not found mainstream policy attention. The report highlights the scale of the informal industry in India and the opportunities and vulnerabilities in the wake of digitisation and external shocks such as the Covid-19 pandemic. As demonstrated in the sections above, the income for most categories of artists and performance are very low, in addition to the problems of seasonality and unreliable sources of income. These problems are also exacerbated by the lack of training and professionalisation of players in the informal segment.

The music industry in general suffers from poor returns to artists, reflected in the low earnings by industry associations and performance rights organisations as well as the dominance of ad-based earnings for streaming platforms. Other avenues of earning in the form of live public performances also face challenges of poor infrastructure, binding rules on performance timings, etc. For the overall growth of the music industry and specifically for the informal sector, we make a few recommendations summarised below.

Figure 7: Pillars for Policy Action



4.1 Strengthening the role of institutions

Economic institutions, as popularly recognised, play a very important role in the levels of prosperity of a country.[29] This is as true of the music industry as it is of any other. The Indian Performing Rights Society (IPRS) and the Phonographic Performance Limited (PPL) are the leading organisations that govern the commercial use of music in India. Our stakeholder interactions have suggested that while both institutions have matured and strengthened over time, in comparison to several other countries, the member association and revenue generated by these institutions remain relatively low (Figure 8).[30] The earnings of these institutions play a role in nurturing talent, providing security to artists during economic shocks (as illustrated during the Covid 19 pandemic) and creating a fair and regulated environment for the commercialisation of music.

While globally, governments approach music as an industry central to its cultural reflection and an opportunity for growth, in India, music has seen commercial success primarily in the shadows of the film industry. South Korea is a prime example of how the government can create soft power through music. According to a survey conducted in 2021 across 18 countries, 39 per cent of the respondents stated that *K-pop* was very popular in their country. The Korean government has stated its intent to channelize this momentum by involving celebrities in traditional diplomatic events, recording their messages of support before major negotiations, etc. India is a powerhouse of talent, visible in the numerous independent efforts made by a few businesses, successful artists and now online platforms. A structured policy that focuses on

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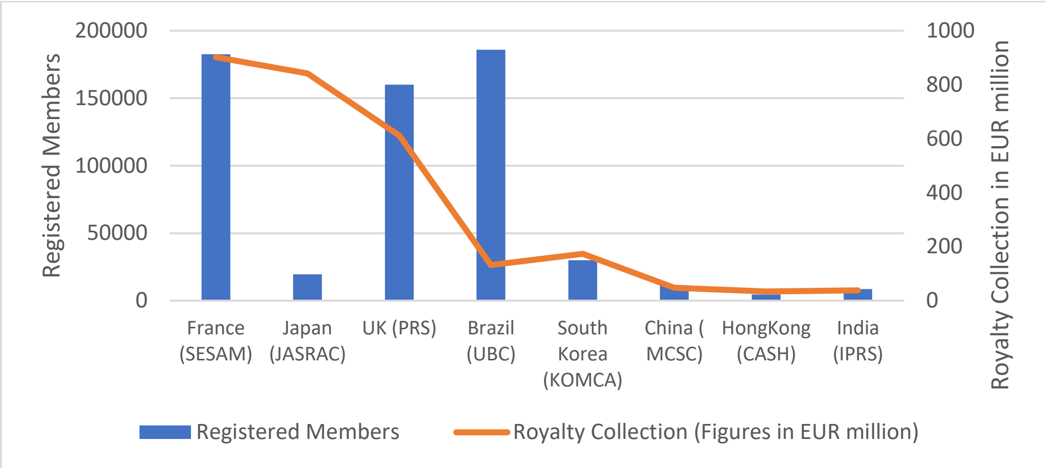
29 Acemoglu, Daron; Robinson, James. 2008. The Role of Institutions in Growth and Development. Commission on Growth and Development, Working Paper No. 10. World Bank .https://openknowledge.worldbank.org/handle/10986/28045 [Last accessed August 4, 2002]

30 Not reflected in this graph is the membership of American Associations ASCAP and BMI (2021), which have a membership of over 2 million and royalty collections that gross over USD2200 million. The membership for India's PPL as noted from their website is 496.

strengthening institutions and supporting artists will go a long way in encouraging young artists to pursue music full time instead of treating it as a hobby or side income.

Figure 8: Royalty Collections and Registered Members of Music Associations by Country (2021)



Source: CISAC Global Collections Report 2021, Royalty Collection (unaudited) for FY 2021-22, websites f societies and associations

4.2 Improving and increasing public infrastructure for live performances

Our stakeholder interactions have pointed to the need for better infrastructure to host live performances. For most artists, options available for live gigs across cities, including metropolitans, are only a handful.[31] For mega concerts and blockbuster events, these are even fewer. Stakeholders pointed out the reluctance to share sports stadiums and other existing public infrastructure to host music events. The cost of hosting a live event has escalated due to the lack of infrastructure, as organisers have to create temporary structures that other countries offer as plug and play. The live market has reportedly not reached a stage where shows can turn a profit from the sale of tickets alone. Tickets cover at most 30 per cent of total costs. Having usable venues can make the live industry profitable, encouraging its growth. Some practices such as single window clearances for music and related events, as well as special licences to perform in other public venues, should be implemented by government institutions, while more infrastructure is created.

4.3 Improving quality by training and professionalisation of artists and sound engineers

[31] Shunasir Sen, June 2022. We Need to Address India's Abysmal Lack of Live Venues https://rollingstoneindia.com/we-need-to-address-indias-abysmal-lack-of-live-venues/ [Accessed August 4, 2022]

Our report presents significant evidence on the lack of quality and training in the informal music sector. Most artists depend on training provided on the job, or through family members, and more recently, online videos and other informal sources. As stated above, this reduces the bargaining power of artists and technical service providers in the industry as well as minimises opportunities to migrate to other high paying alternatives. While the number of institutions available for training have increased over time, it is neither adequate nor is it accessible by many in the informal sector. Emphasising training and professionalisation will not only improve the quality of music produced but also increase employment opportunities for youth that want to become a part of the industry. Incentivising certifications will drive new comers to be conscious of the quality they bring to the industry, much like other professions. This will also open up opportunities for the integration of the formal and informal sector. The government should focus on increasing the support for training, including low-cost training by setting up more institutions and inculcating a culture of training and professionalisation.

4.4 Need to strengthen IPR laws and its enforcement.

Poor enforcement of IPR laws is perhaps the sorest point for the industry. This report started with a discussion on the undervaluation of the industry's potential due to the non-payment of royalty and for the consumption of music generally. There is a history of exploitation especially towards creators of music. The Copyright Amendment Act of 2012 set the record straight on royalty owed to the authors as well as the separation of access to literary and musical works and sound recordings for broadcasting organisations.[32] Many commercial activities in India continue to use copyright protected music without paying for it. There are a series of court cases on this matter. PPL in 2018 and 2019 filed a petition to disallow restaurants, pubs, hotels, etc., from playing popular songs without obtaining a copyright licence.[33] In another recent judgment, the Intellectual Property Appellate Board (IPAB) upheld the rights of IPRS and its members to claim royalties from FM radio stations in India.[34] These cases and the resistance to non-compliance with IP laws have had some effect on the revenues of IPRS. Its income increased from INR45.8 crore in FY 2017-18 to INR310 crore in 2021-22[35]. The increase in revenue can be attributed to TV royalties and the growth of OTT platforms. However, the shutting down of restaurants and hotels during the pandemic and the continued reluctance of commercial consumers to pay royalty have continued to affect incomes levels.

While enforcement continues to remain a challenge, the law itself can be strengthened in favour of the industry. The current Act allows exemptions to educational institutions, resident bodies, non-profit clubs, religious institutions and bonafide religious ceremonies including weddings. A more nuanced view of these exemptions can improve the royalty base for commercial music.

32 https://copyright.gov.in/documents/cract_amndmnt_2012.pdf [Accessed August 4, 2022]
33 https://economictimes.indiatimes.com/industry/media/entertainment/ipab-allows-iprs-to-collect-royalties-from-fm-radio-stations-for-its-members/articleshow/80098210.cms?from=mdr [Accessed August 4, 2022]
34 https://economictimes.indiatimes.com/industry/media/entertainment/ipab-allows-iprs-to-collect-royalties-from-fm-radio-stations-for-its-members/articleshow/80098210.cms?from=mdr [Accessed August 4, 2022]
35 As reported by IPRS

India is one of the few countries that allows music to be performed at weddings and educational institutions without any copyright licence. In fact, in countries like the USA and UK, even religious institutions like churches pay royalty to local copyright societies for music performances. These exemptions result in huge losses, considering the volume of weddings and the economic activity surrounding it.

Additionally, the current law needs a balance between users and producers. The current version is user centric because of the provision for compulsory licence (Section 31), statutory licence for cover versions (Section 31C), statutory licence for broadcasting (Section 31D) and general exceptions to infringement of copyright under section 52 of the Act and does not favour creators and owners of the copyright. Law, if not in favour of creators and owners, needs to be balanced so that creators and owners of copyright are adequately remunerated for the investments made in composition and production as well as for their creativity.

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Appendix

Appendix 1: Questionnaire for the survey

A. Gender

Male
Female

B. Could you please tell me your exact age? ____

Respondent Age
Less than 18 Years
18-25 Years
26-35 Years
36-45 Years
>45 Years

C. Highest Level of Education

Illiterate
Literate but without formal schooling
Less than primary
Primary school (passed 5th)
Middle school (passed 8th)
High school /matriculate (passed 10th)
Higher secondary/ intermediate (passed 12th)
Diploma
Graduate
Postgraduate
Others (Please specify_________)

D. Survey Location

Chennai
Jaipur
Delhi
Kolkata
Varanasi
Patna
Ahmedabad
Kohima
Indore
Trissur
Amravati

E. What is the nature of your participation in the music industry?

Self-employed (Business)
Freelancer
Full-time employee
Part-time employee
Contractual (Daily Wage Earner)

F. Your total years of experience in the music industry?

<u><</u>5 years
>5 to <u><</u>10 Years
>10 to <u><</u>15 Years
>15 to <u><</u>20 Years
>20 to <u><</u>25 Years
>25 Years

G. Please specify your monthly income from music related activities.

$\leq$25,000
>25,000 to $\leq$ 50,000
>50,000 to $\leq$ 75,000
>75,000 to $\leq$ 100,000
>100,000 to $\leq$ 1,25,000
>1,25,000 to $\leq$ 1,50,000
>1,50,000 to $\leq$ 1,75,000
>1,75,000 to $\leq$ 2,00,000
>2,00,000 to $\leq$ 2,25,000
>2,25,000 to $\leq$ 2,50,000
>2,50,000 to $\leq$ 2,75,000
>2,75,000 to $\leq$ 3,00,000
> 3,00,000

H. What are the various types of compensation received from commercial activities related to music?

Cash compensation (inclusive of food, travel, and accommodation)
Cash compensation (exclusive of food, travel, and accommodation)
Accommodation [DO NOT SHOW if CODED '1']
Food [DO NOT SHOW if CODED '1']
Travel [DO NOT SHOW if CODED '1']
Clothes
Jewellery/ Other Valuables gifts
Tips in form of cash/ kind
Others (please specify)

I. Do you file income tax returns every year?

Yes
No

J. Do you pay income tax on the income you earn from music related activities?

Yes, I pay income tax
No, income is below tax slab
Don't know/ Can't Say (My company/organisation deducts tax and pays the rest)
Others (please specify_______________)

K. For how many years has your income been associated with the music sector? (In years)

≤ 5 years
>5 to ≤10 Years
>10 to ≤15 Years
>15 to ≤20 Years
>20 to ≤25 Years
>25 Years

L. How have you received training?

Paid training from specialised music schools
Paid training from home-based music teacher
Paid training from full -time schools and colleges
On the job training
Apprentice (*ustaad*/pert)
Trained by family members
Self -taught/ did not receive any training
Others (please specify)

M. Please specify the kind of vocational training you have undergone.

specialised music schools
home based music teacher
Full-time schools and colleges
On the job/apprentice
Others (please specify___________)

N. Please specify which category you belong to.

Brass Band Member
Member of an Independent Music Band/Orchestra/Group
Own Band/Orchestra/ Group
Solo Artist/Freelancer Musician (Singer/ Instrument Players)
Solo Artist/Freelancer Musician associated with band(s)/Group(s) occasionally
DJs
Independent Music Teachers
Independent Sound Engineer
Others (please specify)

QUESTIONNAIRE – PART A

1. Please specify the year in which you joined the band(s)/group(s) that you are presently a member of (if you are presently a member of more than one band/group, please specify the details for each of them)

	Nature (Brass Band/Independent Music Band/Group/Orchestra)	Year of Joining/Starting as a member of band/ group (e.g., 2001, etc.)
Band/ Group 1	______________________	______________________
Band/ Group 2	______________________	______________________
Band/ Group 3	______________________	______________________
Band/ Group 4	______________________	______________________

(Please include additional rows for more bands/groups)

2. How many members are there approximately in the band(s)/group(s) that you are presently associated with? (if you are presently a member of more than one band/ group, please specify the number of members for each of them)

	< 5 members	**5-10 members**	**10 – 20 members**	**20 – 30 members**	**> 30 members**
Band/ Group 1					
Band/ Group 2					
Band/ Group 3					
Band/ Group 4					

You said you are associated with the following bands/ groups. Could you please tell us which band/group you are **mostly/ primarily** associated with?

Band/ Group 1
Band/ Group 2
Band/ Group 3
Band/ Group 4

3. What kind of music does your band/ group play?

Classical Indian Music Recorded
Classical Indian Music Un-Recorded
Folk Music Recorded
Folk Music Un-Recorded
Bollywood Retro Music
Bollywood New Age Music
International Music (English, K-Pop, J-Pop)
Own Compositions
Others (please specify ________________)

4. What kind of events does your band/group perform at?

Weddings
Private Gatherings (Birthday, Anniversary, House-warming, Funerals etc.)
Gigs at Restaurants/Pubs/Cafés/Malls
Music Festivals
Live Concerts/Performances (Ticketed)
Live Concerts/Performances (Un-ticketed)
At temples, *gurudwaras*, mosques, churches, *jagratas*, processions, etc.
Others (please specify___________)

5. Are your band/group performances recorded and published?

Yes
No

6. Please also mention the type of music you record and the platform you use for recording your music?

	Digital Platforms	**TV cable**	**Radio**	**Others (please specify)**
Classical Indian Music Recorded				
Classical Indian Music Un-Recorded				
Folk Music Recorded				
Folk Music Un-Recorded				
Bollywood Retro Music				
Bollywood New Age Music				
International Music (English, K-Pop, J-Pop)				
Own Compositions				

7. Does your band/group earn income from the following sources?

Digital Platforms (Facebook, YouTube) [SHOW IF CODED 1 anywhere in Q7]
TV Cable[SHOW IF CODED 2 anywhere in Q7]
Radio [SHOW IF CODED 3 anywhere in Q7]
Teaching Music
Selling of band (s)/ group(s) merchandise
Royalty
Selling Old Equipment/ Instruments
Others (please specify____________________)

8. Is the number of performances of your band/group impacted as per season?

Yes
No

9. How many months in a year would you say you consider as on-season for your band? _________________ **[IN MONTHS]**

10. How often does your band/group get to perform in a month?

a) During on-season	
b) During off-season	
c) Non-Seasonal (Regular)Profession	

11. How much does your band/group earn per show/event on an average excluding tips? (in INR)

a) During on-season	
b) During off-season	
c) Non-Seasonal (Regular)Profession	

12. Does the band have an organiser/ manager?

Yes
No

13. If yes in above question, how much of the earnings of the band/group goes to the organisers/managers for every event?

$\leq$10%
11-20%
21-30%
31-40%
41-50%
More than 50%
Don't know/ Can't Say

14. Please specify the names of the top 3 cities where your band/group perform regularly/ have the maximum number of performances.

	Name
City 1	
City 2	
City 3	

15. Has the band/group performed in other countries?

Yes
No

16. You said your band/group does not perform outside India; could you please specify the reasons.

Do not wish to perform outside India
Lack of funds/ funders
Limited outreach of band/group/individual
Operate/Prefer to operate on a small scale
Unable to meet specific demands of audience/organisers
Covid -19
Don't Know/Can't Say
Others (please specify__________)

17. Is your band/group registered as an association/society/company?

Yes
No
Don't Know/Can't Say

18. What is your role in your band/ group? **[MA]**

Singer
Instrumentalist
Sound Engineer
Others (Please specify ________________)

19. (a) Please specify if you buy your own instruments/equipment or does the band/group provide them to you/is it a shared purchase?

    (b) Please also indicate the approximate cost for the applicable cases.

		(a) Yes/ No	(b) Approx. Cost(s) to you
I.	Buy own instrument/equipment		
II.	Instrument/equipment provided by band(s)/group(s)		
III.	Shared purchase		
IV.	Rent instrument/equipment		

20. On an average, how much do you spend annually on repairing and maintenance?

Musical Instruments	
Sound Equipment	
Other Event Related Items	

21. What share of the total earning of the band/group per show/event is given to you?

≤10%
11-20%
21-30%
31-40%
41-50%
More than 50%
Don't know/Can't Say

22. Do you receive any tips over and above your earnings?

Yes
No

23. Where do you source music for your performance/training?

Buy CDs/Pen drive
Record your own CD
Access on digital platforms (You Tube, Spotify)

24. In your opinion, what are the disadvantages of working in this sector?

Irregular income
Low income/Financial Risk
Juggling between different jobs
No time for rest/relaxation
No social security
Others (please specify____________)
No disadvantages
Don't Know/Can't Say

25. In your opinion, what are the advantages of working in this sector?

Creative independence
Multiple sources of income
Learning opportunities
Time flexibility
Others (please specify_____________)
Don't Know/Can't Say

QUESTIONNAIRE – PART B

26. What sort of activities do you engage in?

Performances at private events (including parties, weddings, birthdays, anniversaries, housewarming, funerals etc.)
Performance at club, malls, restaurants, hotels
Live Concerts/Performances (ticketed)
Live Concerts/Performances (Unticketed)
Performance on Digital Platforms
At temples, *gurudwaras,* mosques, churches, *jagratas*, processions, etc.
Home-based Teaching
Others (please specify___________________)

27. What kind of music do you play/sing/teach?

Classical Indian Music Recorded
Classical Indian Music Un-Recorded
Folk Music Recorded
Folk Music Un-Recorded
Bollywood Retro Music
Bollywood New Age Music
International Music (English, K-Pop, J-Pop)
Own Compositions
Others (please specify ___________________________)

28. Are your performances recorded and published?

Yes
No

29. Please also mention the type of music you record and the platform you use for recording your music? (You can select more than one option.)

	Digital Platforms	**TV cable**	**Radio**	**Others (please specify)**
Classical Indian Music Recorded				
Classical Indian Music Un-Recorded				
Folk Music Recorded				
Folk Music Un-Recorded				
Bollywood Retro Music				
Bollywood New Age Music				
International Music (English, K-Pop, J-Pop)				
Own Compositions				

30. Do you earn income from the following sources?

Digital Platforms
TV Cable
Radio
Teaching Music
Selling of band(s)/ group(s) merchandise
Royalty
Selling old equipment/instruments
Others (please specify____________________)

31. Is your number of performances impacted as per season?

Yes
No

32. How many months a year would you say you consider as on-season for you?

____

33. How often do you get to perform in a month?

a) During on-season	
b) During off-season	
c) Non-Seasonal (Regular)Profession	

34. How much do you earn per show/event on an average excluding tip? (in INR)

d) During on-season
e) During off-season
f) Non-Seasonal (Regular) Profession

35. Do you have an organiser/manager?

Yes
No

36. If yes to the question above, how much of your earnings goes to the organisers/managers for every event?

≤10%
11-20%
21-30%
31-40%
41-50%
More than 50%
Don't know/Can't Say

37. Please specify the names of the top 3 cities where you perform regularly/have the maximum number of performances.

	Name
City 1	
City 2	
City 3	

38. Have you performed in other countries?

Yes
No

39. You said you do not perform outside India; could you please specify the reasons.

Do not wish to perform outside India
Lack of funds/funders
Limited outreach of band/group/individual
Operate/prefer to operate on a small scale
Unable to meet specific demands of audience/organisers
Covid -19
Don't Know/Can't Say
Others (please specify__________)

40. Where do you source music for your performance/training?

Buy CDs /Pen drive
Record your own CD
Access on digital platforms (You Tube, Spotify)

41. In your opinion, what are the disadvantages of working in this sector?

Irregular income
Low income/Financial Risk
Juggling between different jobs
No time for rest/relaxation
No social security
Others (please specify____________)
No disadvantages
Don't Know/Can't Say

42. In your opinion, what are the advantages of working in this sector?

Creative independence
Multiple sources of income
Learning opportunities
Time flexibility
Others (please specify____________)
Don't Know/Can't Say

43. Do you have any occasional association with any music band(s)/group(s)/school(s)?

Yes
No

44. Is the band/group registered as an association/society/company?

Yes
No
Unsure

45. What is your role in your band/group?

Singer
Instrumentalist
Sound Engineer
Others (Please specify ____________________)

46. (a) Please specify if you buy your own instruments/equipment or does the band/group provide them to you/is it a shared purchase?

(b) Please also indicate the approximate cost for the applicable cases.

		(a) Yes/No	(b) Approx. Cost(s) to you
I.	Buy own instrument/equipment		
II.	Instrument/ equipment provided by band(s)/group(s)		
III.	Shared purchase		
IV.	Rent Instrument/equipment		

47. On an average, how much do you spend annually on repairing and maintenance?

Musical Instruments	
Sound Equipment	
Other Event Related Items	

48. (a) What share of the total earning of the band/group per show/event is given to you?

≥10%
11-20%
21-30%
31-40%
41-50%
More than 50%
Don't know/ Can't Say

(b) How much do you earn annually from your association with the band/ group?

____

Appendix 2: Methodology for Estimation

We conducted literature reviews of reports and academic papers on the music industry in India. We conducted the first round of stakeholder discussions to assess the broad themes in the area. This was followed by the creation of a questionnaire based on inputs from various stakeholders. After multiple iterations, this questionnaire was piloted and then led to the full-scale survey. We also conducted multiple in-depth interviews (IDIs), focused group discussions (FGDs) and industry discussions to gauge a qualitative understanding of the music industry in India.

For estimating the size and employment of the music industry as well as the employment numbers, the following methodologies have been used. (See table)

Category	Methodology for Employment	Methodology for Income/Revenue
DJs (including helpers)	The employment numbers have been calculated using the data collected by IMI for cities in 21 states/UTs. These numbers were scaled up using the ratio of town level data to the total population of the state from Census 2011. For states where data was unavailable, we use population proportions to extrapolate employment numbers. Other indicators such as per capita income and services share of GDP are weakly correlated with number of DJs/brass bands.	These numbers have been estimated using ICRIER's survey responses conducted in 2022. The range was calculated using weighted averages of the income intervals (bounds) and then multiplied by the total estimated employment to arrive at the income.
Brass Band Members (including helpers)	The employment numbers have been calculated using the data collected by IMI for cities in 21 states/UTs. These numbers were scaled up using the ratio of town level data to the total population of the state from Census 2011. For states where data was unavailable, we use population proportions to extrapolate employment numbers. Other indicators such as per capita income and services share of GDP are weakly correlated with number of DJs/brass bands.	These numbers have been estimated using ICRIER's survey responses conducted in 2022. The range was calculated using weighted averages of the income intervals (bounds) and then multiplied by the total estimated employment to arrive at the income.
Sound Engineers	Numbers are taken from PLFS 2019-20 (NIC Code 5920 for sound recording and music publishing).	These numbers have been estimated using ICRIER's survey responses conducted in 2022. The range was calculated using weighted averages of the income intervals (bounds) and then multiplied by the total estimated employment to arrive at the income.
Cultural Education	Numbers are taken from PLFS 2019-20 (NIC Code 8542 for Cultural Education).	These numbers have been estimated using ICRIER's survey responses conducted in 2022. The range was calculated using weighted averages of the income intervals (bounds) and then multiplied by the total estimated employment to arrive at the income.
Instrument Manufacturers (Informal)	Numbers are taken from PLFS 2019-20 (NIC Code 3220 for sound recording and music publishing).	These numbers are based on the inputs provided by music manufacturers during FGDs and IDIs. *(The formal sector numbers based on ASI is 331 employees in 19 firms with a total revenue of INR19.3 crore.)*
Merchandise Manufacturers	Employment was indicated by an industry representative.	This is a new and evolving industry. No clear estimates are available.

Appendix 3: Profile of Survey Respondents

Category	Gender (%)	
	Males	Females
Brass Band Member	88.6	11.4
DJs	97.1	2.9
Independent Music Teachers	54.7	45.3
Independent Sound Engineer	98.5	1.5
Independent musicians	82.9	17.1

Category	Age (%)			
	18-25 Years	26-35 Years	36-45 Years	>45 Years
Brass Band Member	22.7	43.5	21.6	12.2
DJs	31.4	50.2	13.5	4.8
Independent Music Teachers	18.8	48.3	26.9	6.0
Independent Sound Engineer	19.4	58.7	16.9	5.0
Independent musicians	26.3	42.5	20.8	10.3

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