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AN INDUSTRY RESEARCH REPORT

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# **The Right Draft: 2023**

Based on findings of a survey conducted among  
screenwriters working in the Indian theatrical  
and streaming industries

# Prologue

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by Radhika Gopal, Tulsea

A good story - quite simply, is where it all begins. Whether one sets out to make the next mainstream blockbuster, a festival-darling independent film, a new exciting game, a compelling documentary, an addictive series, an engrossing podcast...it takes a village - a passionate tribe of people with craft and intent, a balance of creative and commerce, and a sprinkling of magic.

Ormax Media and Tulsea partnered to conduct a unique survey oriented specifically towards professional Indian writers - across different languages and levels of experience in feature film and series writing - to understand how writers feel about several key aspects of their career, including compensation, credits, creative freedom, quality of feedback, stakeholder value, respect, the creative ecosystem overall, and more, and lots more. Some results matched our expectations, some surprised us. On the positive side the writers we surveyed did note that per certain metrics the situation is better than it was a few years ago. However, the overall message is clear: there is much that we, as an industry, need to do to make our writers feel truly empowered, valued, enabled, and respected.

We have barely scratched the surface with this first edition of the survey, and we look forward to expanding our ambit in subsequent years, such as including writers working in linear television and other formats. It has been an incredible experience working on this survey over the past several months and we are excited to share the observations and learnings we gathered through this endeavour.

It is a time of introspection for all of us in media and entertainment - the audience is unpredictable, the market is in a state of flux world over, new challenges are emerging.

However, we truly believe that this is a great time to be in this business, because challenges unlock opportunities. It gives us the window to reinvent, to unlearn, and to implement change. Perhaps as good a time as any to remind ourselves that it all begins with a good story...and a great writer!

# Executive Summary

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1. A first-of-its-kind survey was conducted among 217 film & series writers in India, to gauge their perceptions about various aspects of the writing profession in India, and about the entertainment industry in India in general.
2. Though a sizeable section (65%) believes that pay levels have improved in recent years, 63% still believe they are not being paid fairly. Timeliness of payments is also a significant concern, impacting 47% writers directly.
3. A dominant majority of writers (91%) believe that a hybrid pay model, comprising of a mix of fixed pay and incentive/ bonus, will motivate them to do better work, and lead to higher ownership. However, only 31% have ever been offered a contract of this nature so far.
4. 53% writers are dissatisfied with the credit they receive for their work. The dissatisfaction with credit in marketing & promotions is even higher, touching 65-80% of different types of marketing activities.
5. Writers' perception of the quality of feedback received on their work varies by the provider of the feedback. They are more satisfied with the quality of feedback provided by directors and showrunners, but less satisfied with feedback from production houses, OTT platforms, and TV channels.

6. In writers' opinion, there is a marked difference in the importance scripts carry over stars in the theatrical and OTT industries. 90% writers believe theatrical business values stars over scripts, while the view is a lot more balanced for the OTT industry, though still tilted away from scripts and towards stars.
7. A large section of writers believe that they do not have adequate access to mentoring, infrastructure, grievance redressal, and other such industry forms of support.
8. 74% writers believe that writers' room are a collaborative method, leading to better quality of output. However, the experience of writers with writers' rooms thus far has been mixed.

# Research Design

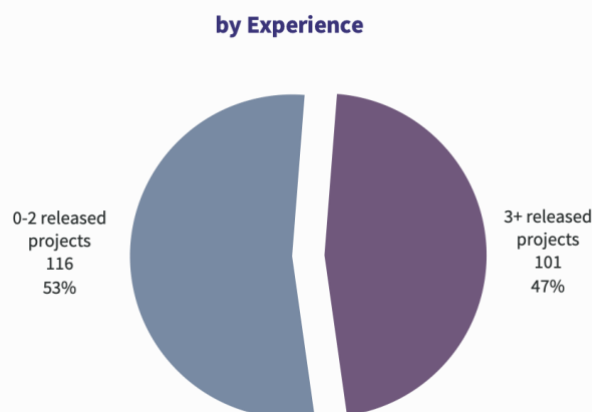
This report is based on primary research conducted in Jan-Mar 2023. Based on their industry experience and interactions, Ormax Media and Tulsea designed a survey questionnaire, which was answered by **217 writers**.

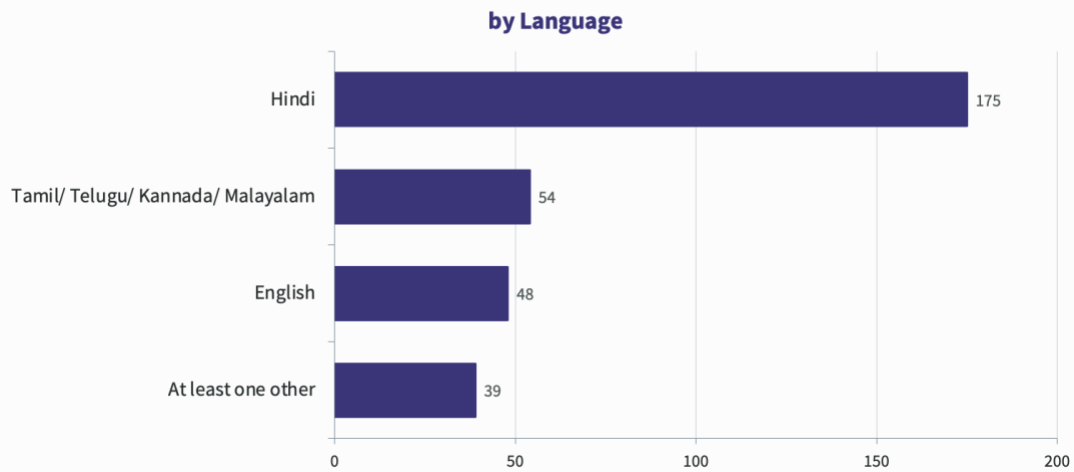
Breakup of the 217 participating writers by categories:

## Demographic

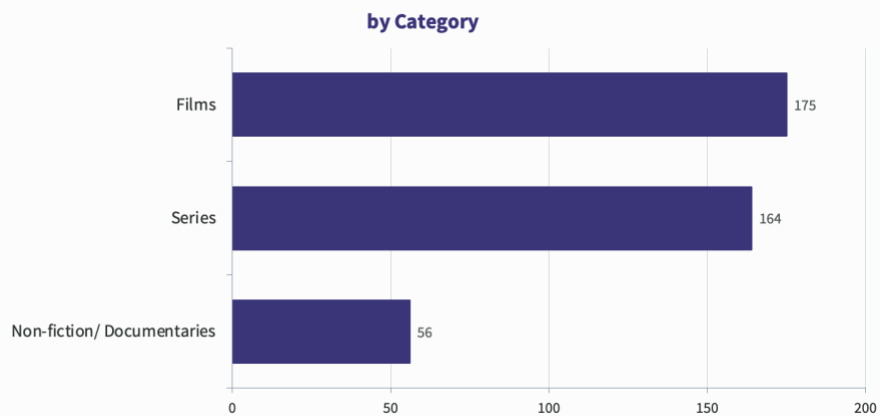


## Work Profile





Writers surveyed were writing in 1.6 languages on an average.



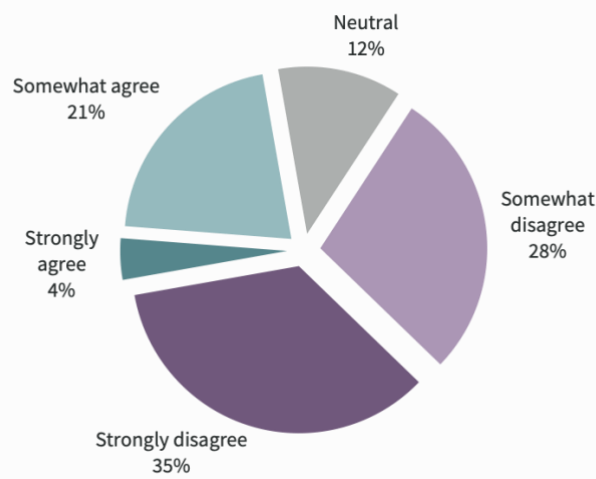
# The Right Pay

What do writers perceive about how much, how, and when they are paid?

For this section of the report, we asked the writers to answer a few questions related to their compensation, such as they pay, contract structures, timeliness of pay-outs, etc. The following sub-sections showcase the results.

## FAIR COMPENSATION

Writers were asked if they agree with the statement: **You are paid a fair value for your work as a writer.** The chart below is how they responded.

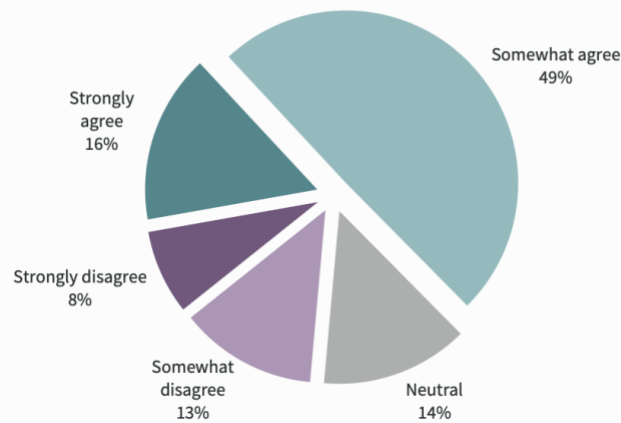


Nearly 2 out of 3 writers (63%) believe that they are not paid fairly.

This proportion is even higher among non-fiction/ documentary writers (73%), vis-à-vis series (63%) and film (62%) writers.



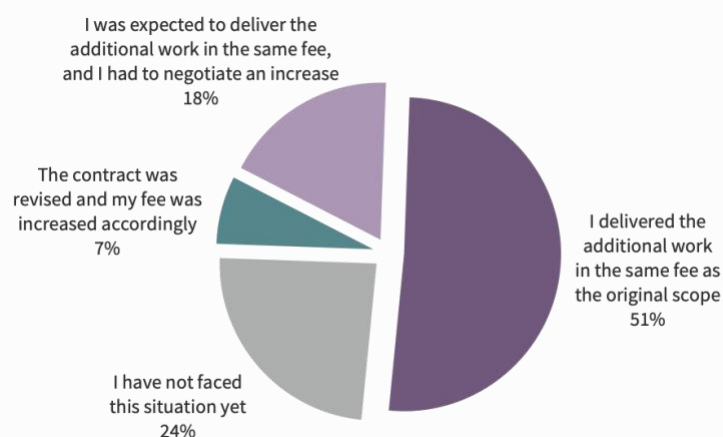
They were also asked to react to the statement: **Writers are being paid better now, than they were about 3-4 years ago.**



On a positive note, 65% writers believe pay levels have improved in recent years. However, a sizeable section of them is only somewhat convinced about this change. This perception is stronger among experienced writers who have written 3+ released series/ films (76% agree) vs. inexperienced writers (56% agree).

### Change in Scope of Work & its Impact on Compensation

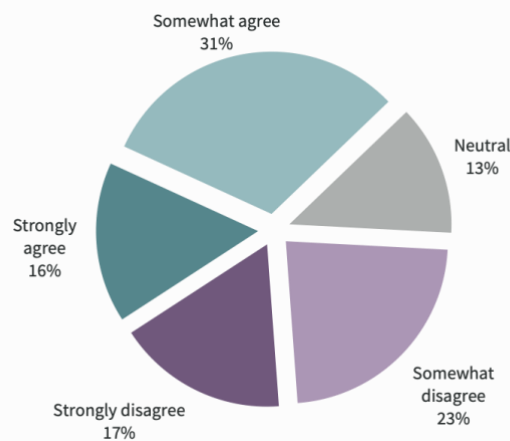
The nature of a writer's work is such that the scope of work can often change, generally expand, during a project. Writers were asked if a change in the scope of their work also impacted the compensation they receive for the said project. Here's what they stated:



76% writers have faced a scenario where the scope of work increased after the contract was signed. In a vast majority of cases, there was no change in fee, highlighting the limited leverage writers have even today.

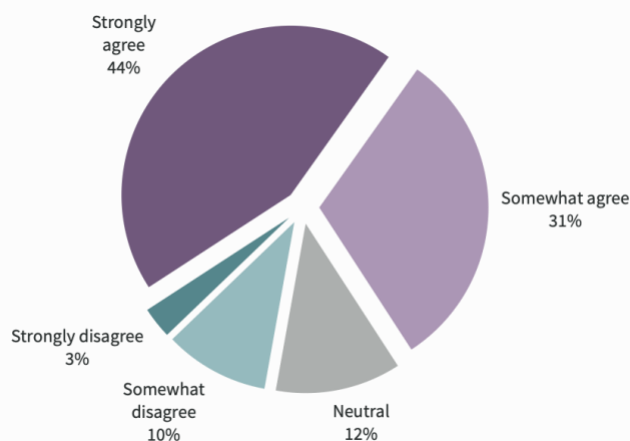
## TIMELY PAYOUTS

Writers were asked if they agree with the statement: **You are paid in a timely manner, as per the terms defined in the contract.** Here's how they responded.



Almost 1 in 2 writers feel they are not paid as per the timelines defined in their contracts.

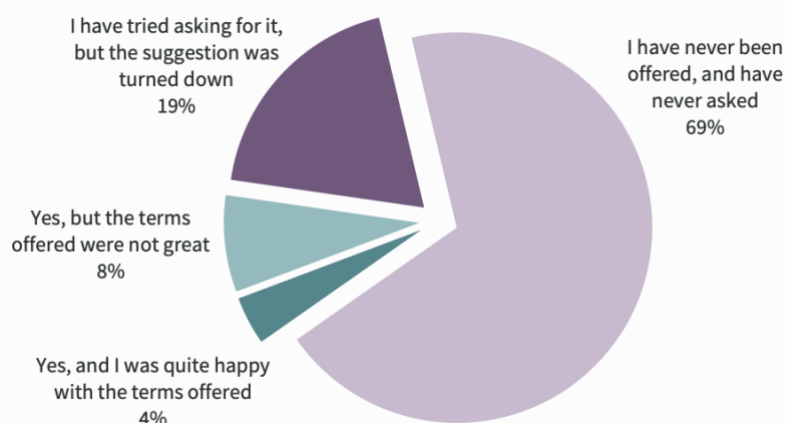
They were then asked to react to the statement: **You have to constantly follow up on payments, when they become due to you.** The results:



A vast majority of writers (75%) feel the need to follow-up on their due payments. This sentiment is true across segments, ranging from younger to older writers, and writers of series, films, or non-fiction, as well as in the South.

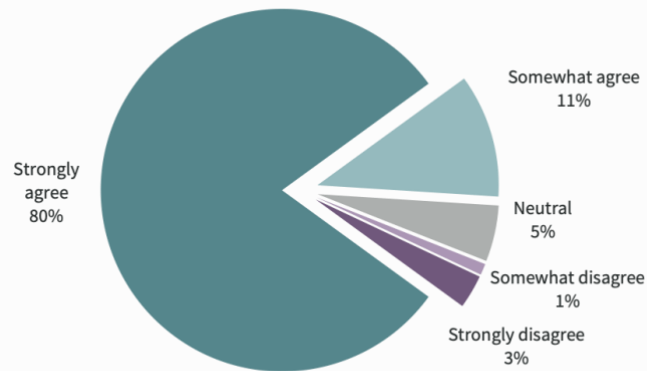
## INCENTIVES & BONUS

Contingent compensation structures entail more risk, but also give writers a chance to be financially rewarded in success. To gauge their perception of such compensation structures, writers were asked: **Have you ever been offered profit sharing or bonus related to viewership/ box office of a movie or a show you have written?**



Less than 1 in 3 writers have ever been a part of a contractual discussion where the payment terms include contingent compensation.

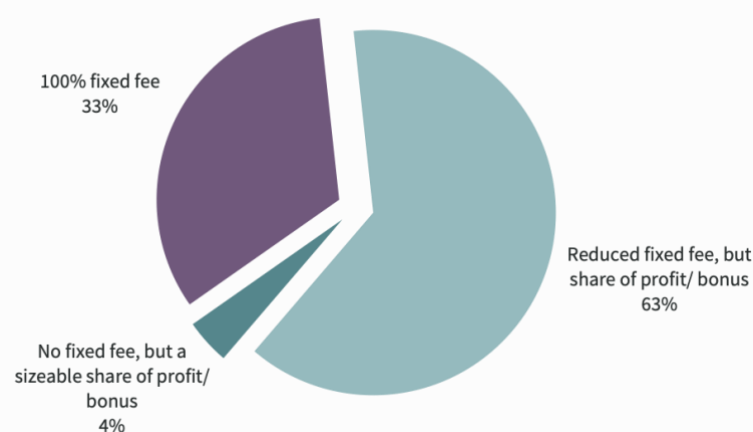
In a follow-up question, they were asked to react to a hypothetical scenario, and react to this statement: **You will feel greater ownership of the project if your contract also has a bonus or profit-sharing component that's paid if the movie/ show succeeds, based on pre-agreed parameters.**



An overwhelming majority of writers strongly agree that a performance bonus or profit sharing can create a stronger sense of ownership of the project. This belief is in sharp contrast with the current reality, where such deals are rarely discussed or offered.

### Preferred Contract Structure

Writers were asked to select their preference between an entirely fixed, a hybrid, and an entirely contingent compensation structure: **If you are given the choice to select one of the following fee structures for an upcoming contract, which one would you pick?**



63% writers prefer a hybrid pay structure, whereby they can partake in the project’s success or failure, but are paid a reduced fixed fee. This proportion is higher among non-fiction writers (79%) vs. scripted series (63%) and film (61%) writers.

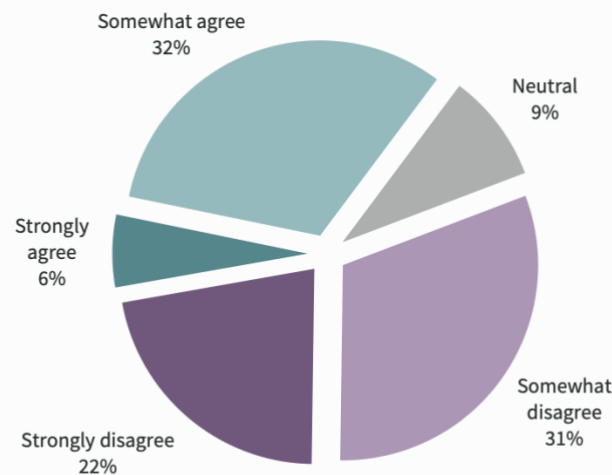
# The Right Credit

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Do writers believe they get due credit for their work?

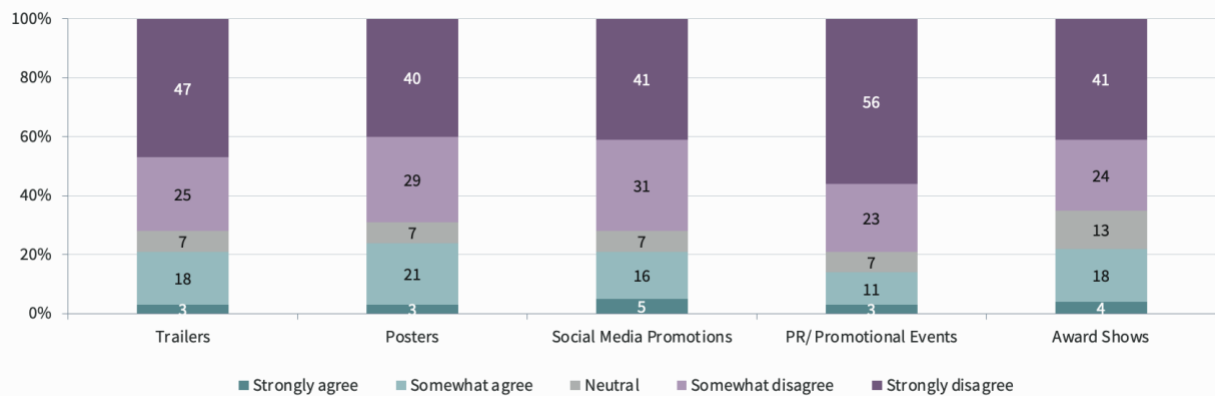
Are writers satisfied with how they are being credited for their work, in film and series credits, as well as in marketing material? We asked them their views on the statement:

**Writers are given fair credit for their work in films/shows.**



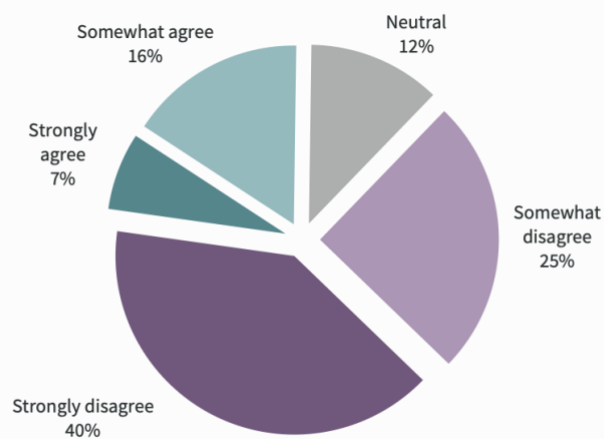
There is dissatisfaction with the fairness of credit, with 53% writers either strongly or somewhat disagreeing with the statement. South industries perform significantly better on this parameter, with only 36% writers disagreeing, vis-à-vis 58% in non-South markets.

Next, we asked them if they believe that **Writers are credited appropriately in the marketing assets of movies/ shows**. This question was asked for five types of marketing assets/ activities.



Perceptions of not being credited in marketing are consistent across different assets/ media, with more than 70% writers disagreeing that they are credited appropriately.

The underlying concern with the idea of 'fair credit' is the absence of an industry standard that defines what fair or appropriate credit is to begin with. This is evident in writers' response to the statement: **There is a defined industry standard on how writers have to be credited, and most producers/ platforms follow this.**



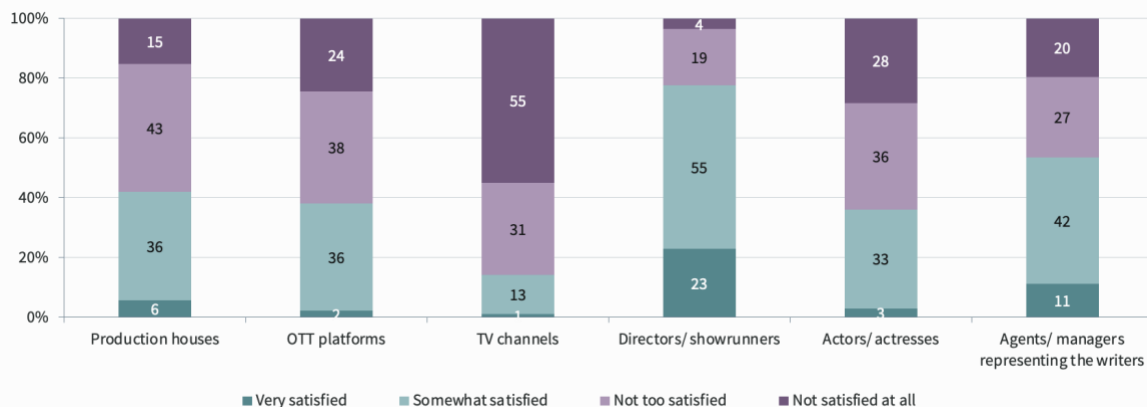
Almost 2 out of 3 writers believe that there is no defined industry standard that can ensure consistency in how writers are credited for their work.

# The Right Feedback

Are writers satisfied with the quality of feedback they receive on their work?

Given the highly collaborative nature of content creation, feedback is an essential part of any writer's reality. Over the course of a project, a writer ends up receiving feedback on their work at multiple stages, and often from multiple people, ranging from producers, platforms, directors, showrunners, actors, etc.

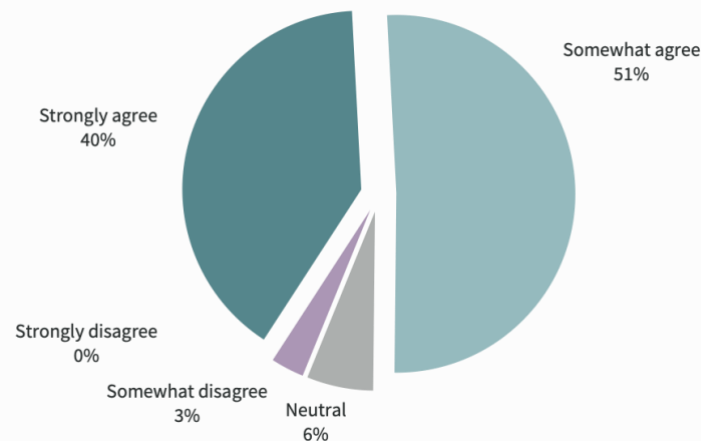
We asked writers about their **Satisfaction Level with the Quality of Feedback** they receive. This question was asked separately for different industry segments with writers answering the question only for segments they have worked in, over the last 12 months.



Feedback from directors/ showrunners is seen as being the most useful and constructive, while that from actors the least. Production houses and OTT platforms score significantly better than linear TV channels, which are seen as the worst in terms of quality of feedback.

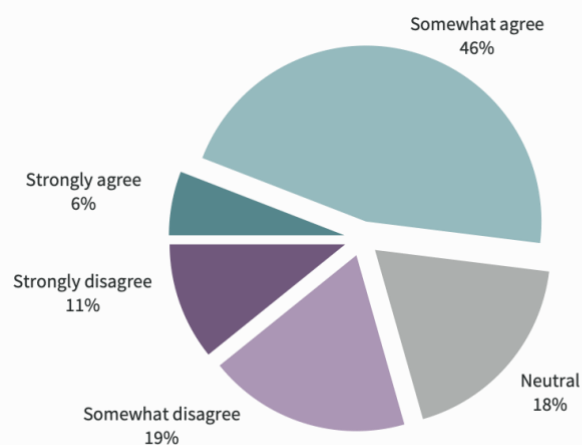


In a follow-up question, writers were asked if they their views on the statement: **The process of feedback is more productive when a director/ showrunner is already attached to the property.**



Besides reinforcing that directors/ showrunners provide the best quality of feedback, the response to this statement also suggests that the process of feedback itself becomes more effective when the feedback is routed via directors/ showrunners, than when it comes via other stakeholders, e.g., studio/ platform executives.

Has there been an improvement in the quality of feedback over time? Writers were to react to the statement: **In general, the quality of feedback being sent to writers has improved over the last 3-4 years.**



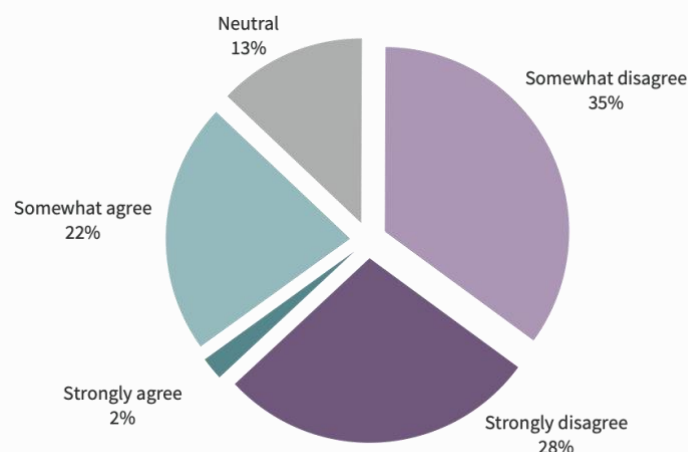
Like compensation, there is some perceived improvement in recent years on quality of feedback too. However, this change can be considered marginal, as reflected in the ‘Somewhat agree’ disposition (vis-à-vis Strongly agree).

## FEEDBACK ATTRIBUTES

Perception was also sought on two attributes of feedback.

### Timely Feedback

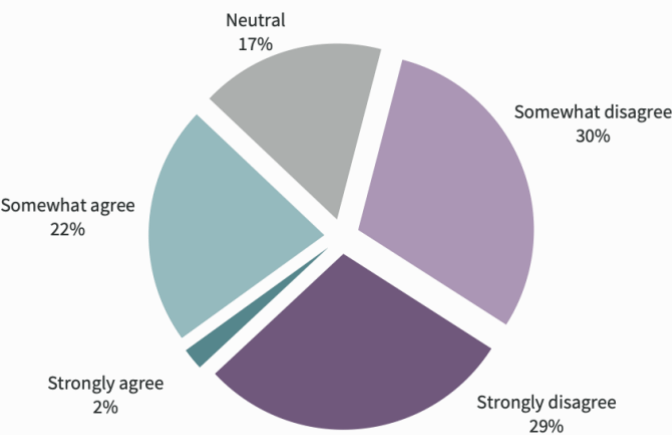
The chart below has writers’ response to the statement: **Feedback usually comes to you in a timely manner.**



Lack of timeliness in feedback is a pain point, with 63% writers disagreeing with this statement. This sentiment is consistent across films, series and non-fiction writers, highlighting that it's an industry-wide issue.

Structured & Logical Feedback

The chart below has writers’ response to the statement: **Feedback usually comes to you in a structured manner, with proper explanation and reasoning.**

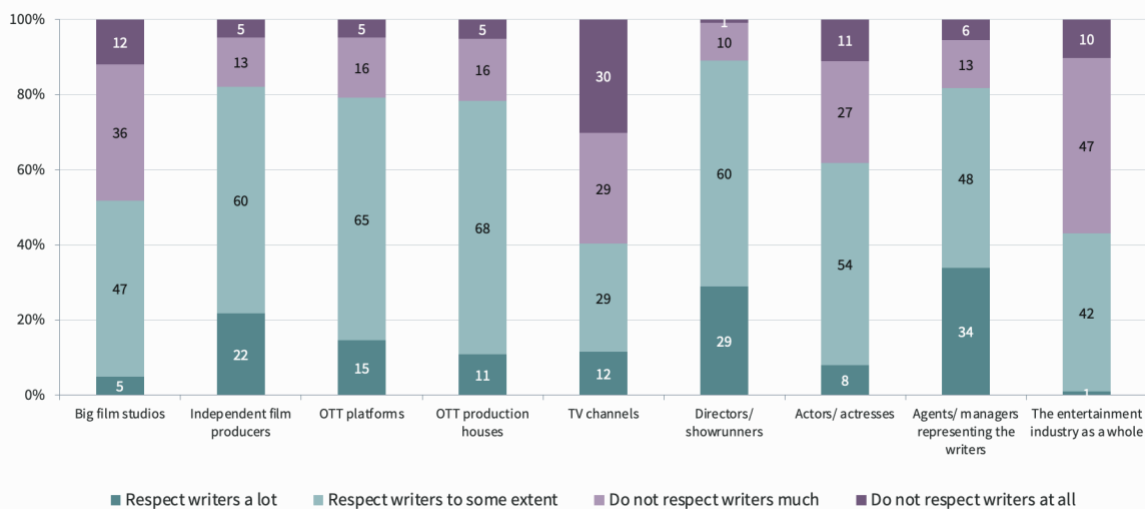


While writers rate quality of feedback better than its timeliness, it’s nevertheless a concern area for them, with only 24% agreeing to this statement, vis-à-vis 59% disagreeing.

# The Right Value

Do writers feel valued and respected by the industry, and by the various stakeholders within it?

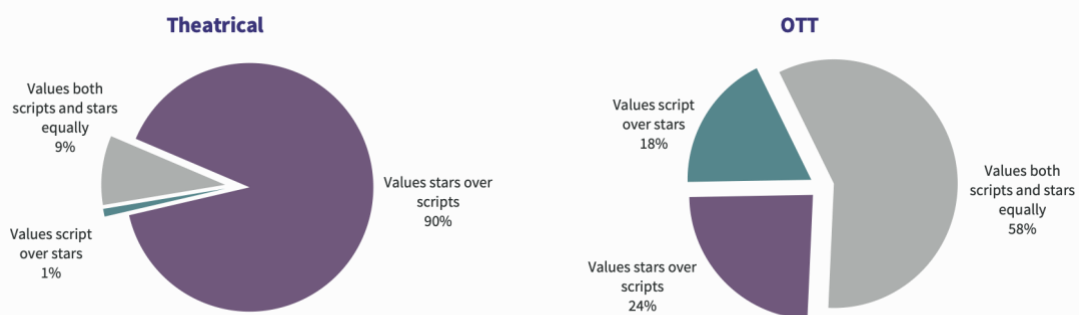
How much do different constituents of the industry respect and value writers? To understand their perception, writers were asked to rate eight different stakeholders (and the entertainment industry as a whole) on a four-point scale, based on how much each stakeholder (as a community) respects writers. The results:



Perceived respect for writers is limited, with “to some extent” being the dominant response for many stakeholders. Linear TV channels and the big film studios are seen as respecting writers the least, while directors/showrunners and agents/managers are perceived as valuing writers the most.

## SCRIPTS VS. STARS

What do writers believe about the relative value a script commands for producers on a project versus the stars (i.e., acting talent) who will eventually get attached to the project? To understand this, writers were asked to pick one of the three statements on the relative value of scripts vis-à-vis stars, by asking them: **Which of these statements best reflects your view on how a typical producer thinks?** This question was asked separately for theatrical and OTT categories.

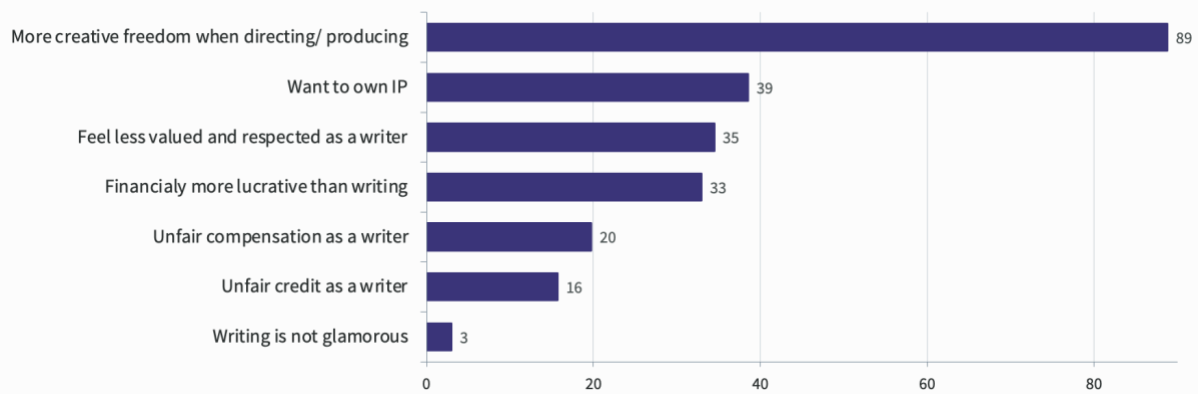


There is a marked difference in the importance scripts carry over stars in the two categories. In theatrical, it is a one-sided story, with 90% of respondents viewing producers as valuing stars over scripts, indicating a preference for star-driven rather than content-driven projects. Streaming is free of theatrical box office pressures, and scripts are seen as being on somewhat equal footing vis-à-vis stars, in writers' minds.

## TURNING DIRECTOR OR PRODUCER

When asked if they had considered **becoming a director or a producer** at some point of time, **91%** writers answer in the affirmative, including **26%** who have already made this transition, while they continue to write.

These 91% were asked to pick upto three reasons (from a list of seven) because of which they have considered (or have already made) the transition. The results:



The need for creative freedom is the dominant reason that drives writers towards directing and producing. Financial motivation is a significantly weaker driver.

# The Right Nurturing

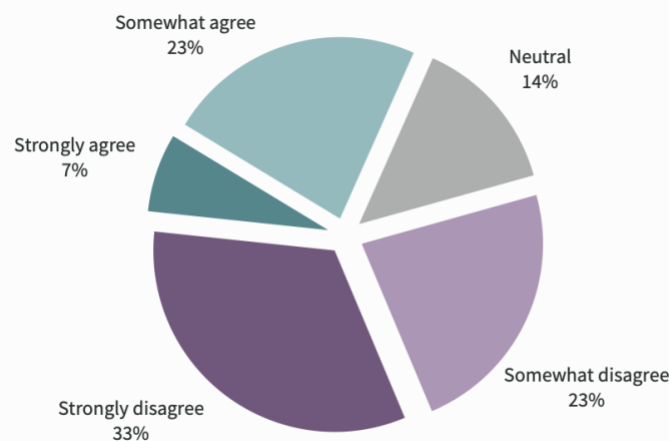
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Does the industry provide adequate support, infrastructure and opportunities for writers to nurture themselves, hone their skills, and grow?

With the advent of OTT content, the industry has seen the entry of a lot of young writers, who are in their early years of professional writing. This makes nurturing of writing talent more relevant than ever before. Writers were asked four questions related to this topic.

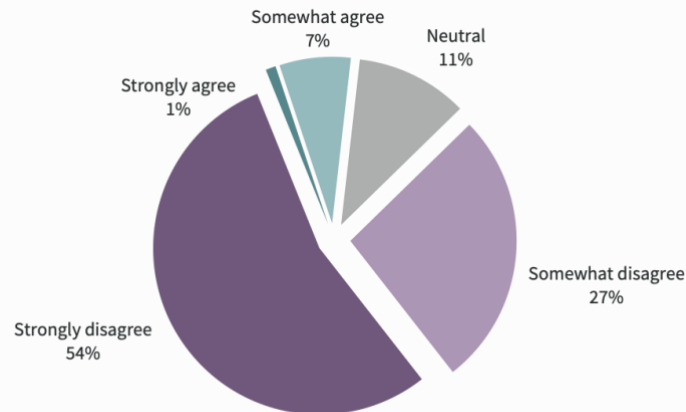
## Access to Mentors & Infrastructure

Writers were asked what they felt about the statement: **You feel you have access to good mentors in the industry.**



A sizeable section of writers feel they do not have access to good mentors in the industry. This is true for writers across experience levels, but more true for series writers (64% disagree) than for those working on theatrical films (50% disagree).

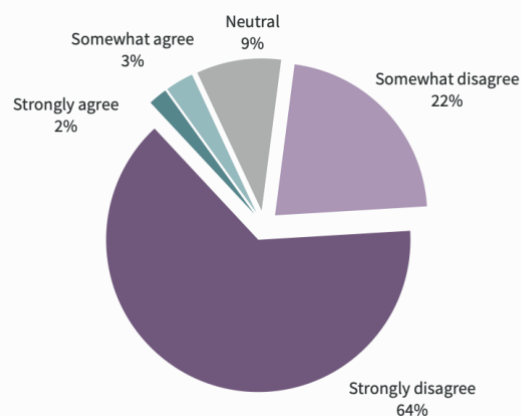
Similarly, they were asked their view about the statement: **The industry works on providing good infrastructure to writers to develop their craft.**



Absence of resources and infrastructure at an industry level is a clear gap, with 81% writers disagreeing with this statement.

## Industry Inclusion

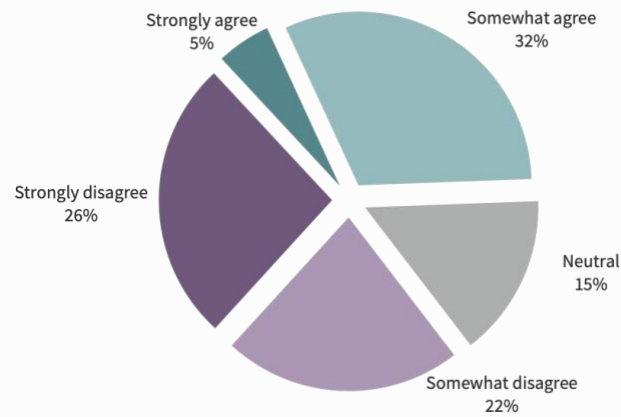
Writers were asked their views on two aspects that are key to gauge how 'included' they feel in the industry. In the first of them, they were asked if they agree with the statement: **The industry involves the writers community in key decisions related to shaping the future of the industry.**





They were then asked about their opinion on grievance redressal, via the statement:

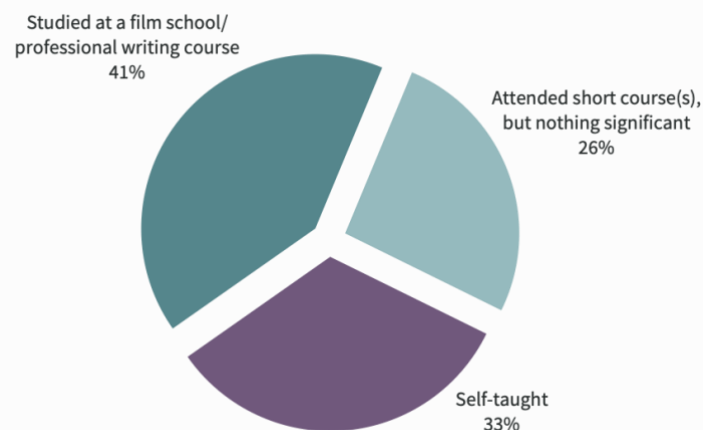
**Writers have good access to the relevant industry bodies for grievance redressal.**



## TRAINING & DEVELOPMENT

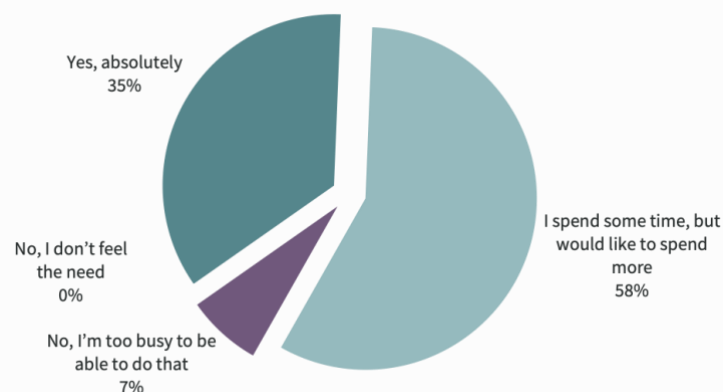
Have writers invested in their own training and development? Or are they merely learning on the job?

We asked writers if they have **undergone any formal training of academic program for screenwriting.**



A sizeable section of writers has studied writing, or at least taken up short programs to hone their craft.

In a follow-up question, they were asked: **Do you feel that you invest sufficient time in enhancing your writing craft?**

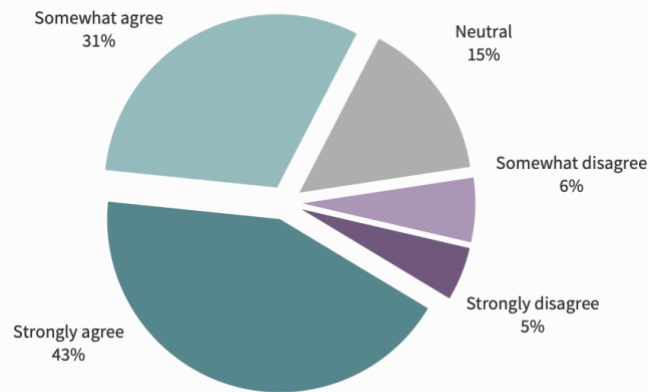


Writers understand the important of enhancing their craft, and spend time on it, though not as much as they would like to.

## WRITERS' ROOMS

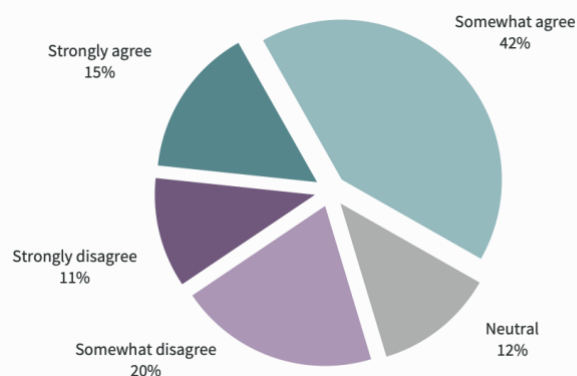
Writers' rooms have emerged as a modern way of collaboration in India, especially with the growth in streaming content in recent years. They also provide a space for young writers to learn from more experienced counterparts, and nurture their own talent in the process.

Writers were asked their view on the statement: **Writers' rooms enable collaboration and exchange of ideas, leading to better quality of work.**



Writers' rooms are seen as being collaborative, leading to better quality of output. This view is shared equally by writers across formats and experience levels, indicating how writers' room have been accepted by the writers' community as a progressive method of working.

In a follow-up, they were asked their view on the statement: **I have been satisfied with the quality of writers in the writers' room I have been a part of.**



Given that writers' rooms are still a new way of working for many writers, the experience of writers' room has been mixed so far. Interestingly, experienced writers with 3+ released properties have had more satisfying experiences (64% agreeing) vs. inexperienced writers (49% agreeing), which highlights an opportunity loss in the area of nurturing of young writing talent.

# The Right Environment

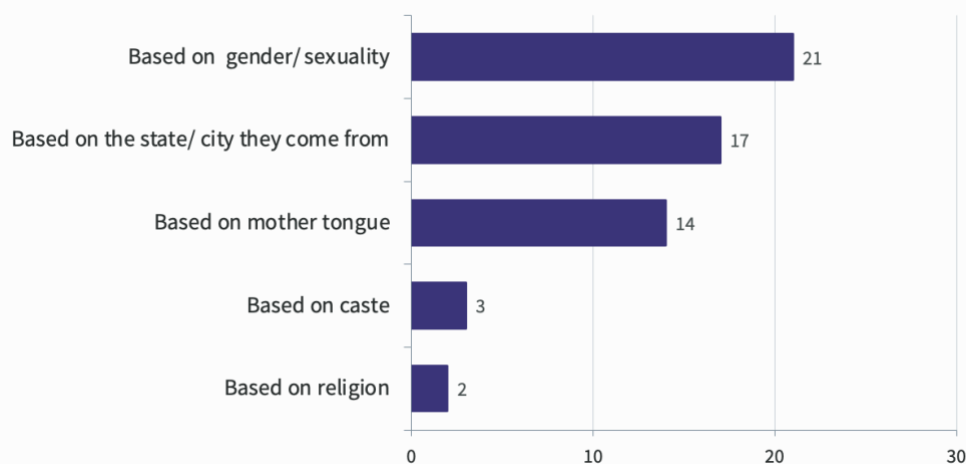
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Do writers face discrimination at work? If yes, of what nature?

Writers were asked if they have faced discrimination of any kind in their career as a writer. Discrimination is a much wider topic, and has only been covered briefly in this report. We hope to expand on this aspect in future editions of the report.

**37% writers answered in the affirmative, that they have faced discrimination at least once in their career.**

They were asked about the nature of the discrimination faced by them. The chart below summarizes this information:



Gender/ sexuality-based discrimination was the highest, followed by that related to region or language. 86% writers who faced gender/ sexuality-based discrimination were female writers.



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