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“Holdtones”: Branding and Positioning Strategy of Brass Band in the Indonesian Music Industry

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Abstract: This research examines the branding and positioning strategy of Holdtones, a brass band from Yogyakarta, in creating a unique space with Indonesia's competitive music industry. Using W. Chan Kim and Renée Maubogne's Bule Ocean Strategy framework and qualitative case study methodology, this research analyzes how Holdtones differentiates itself through instrumental brass band arrangements of popular and regional Indonesian songs. The findings reveal three key strategic moves: eliminating conventional elements (vocalist and lyrics), enhancing musical complexity through sophisticated arrangements and harmonization, and creating cultural value by reinterpreting regional music in brass format. Holdtones successfully leveraged social media platforms, achieving over 16 million vies on TikTok, which translated into real-works performance opportunities at major festivals. The research identifies low direct composition and cultural preservation positioning as primary advantages, while listener education and personnel management emerge as main challenges. This study demonstrates how independent musicians can create uncontested market space through format innovation and digital-first strategies, offering insights for alternative approaches to sustainability in Indonesia's music industry while contributing to cultural preservation through creative reinterpretation of traditional music.

Keywords: branding, positioning, brass band, music industry, indonesian music industry

1. INTRODUCTION

The music industry in Indonesia has experienced many changes in the last three decades due to technological developments, particularly the digitalization of music distribution (Ruddin et al., 2022). These changes began to emerge with the development of the internet, which caused the dematerialization of music formats that ultimately changed consumption from traditional physical formats to digital consumption provided on various social media platform (Vickery, 2005). The shift in sales from physical to digital also changed the strategies and methods used, especially by independent musicians to market their production results (Dewantara & Agustin, 2019).

Along with technological advances and social dynamics, the decentralization of the independent music ecosystem increasingly creates a more democratic and inclusive environment that allows more artists to participate and gain better access in the music industry (Aryandari, 2017). However, recent studies indicated that this opened simultaneously intensifies competition, requiring musicians to adopt increasingly innovative branding and positioning strategies to remain visible within algorithm-driven digital platforms (Aryandari, 2024; Putra Riyadi, 2025).

The transition of distribution from physical to digital forms eventually caused changes in listener tastes, and the emergence of various genres has made competition increasingly fierce. This shows that marketing communication methods in reaching consumers have also shifted due to the use of new media (Siregar



et al., 2022). In this situation, music groups need to find different ways to stand out in order to compete and survive, so they need to have attractively designed content.

Existing research on music industry branding has predominantly focused on mainstream artist and major label strategies, while studies examining independent musicians have largely concentrated on traditional band formats featuring vocalist (Dewantara & Agustin, 2019; Siregar et al., 2022). Scholarly attention to instrumental-only formats, particularly brass bands in the Indonesian context, remains notably limited, representing a significant gap in music industry research. This gap is notable given the growing body of international research highlighting the strategic role of niche formats and alternative identities in digital music economies (Anderson, 2020; Hracs et al., 2016).

Furthermore, while cultural preservation through music has been explored in traditional performance contexts. Hidayatullah (2017) in his research examining how modern reinterpretation and digital dissemination of regional music can simultaneously serve as both a branding strategy and cultural preservation tool is critically absent. This gap is particularly significant given Indonesia's rich musical heritage and the ongoing challenges of maintaining cultural relevance within increasingly globalized markets.

This study addresses these gaps by examining Holdtones' brass band formats as a case of Blue Ocean Strategy implementation, analyzing how format-based differentiation creates uncontested market space while contributing to cultural preservation—thereby extending strategic management theory into creative industries and offering insights for non-mainstream musical form in emerging markets. In doing so, this research extends strategic management discourse into the creative industries and offers insights into alternative survival strategies for non-mainstream musical forms in highly competitive digital environments (Kim & Mauborgne, 2019; Resmadi, 2024).

Holdtones – a brass band from Yogyakarta, emerged in 2024 within this context of intense competition and format homogeneity, offers something different by re-arranging popular songs and regional songs in brass band format, which is an approach that is still rarely found in the Indonesian music world. Brass band – a tradition rooted in England, not only serves as a medium for musical performance but also contributes to the development of professional musicians and has widespread influence to other countries, including Indonesia (Nabba'98, 1998).

Interestingly, Holdtones was not initially conceived as a commercial music project aimed at entering the live performance circuit. Instead, the band originated from an artistic broadcasting project initiated by one of its members, Angga, who was involved in an audiovisual art project connected to Spain. The project took the form of music videos recorded in Indonesia, which gradually developed into more frequent collaborative sessions among the players. These encounters eventually evolved into consistent social media content production, beginning on Instagram, expanding to TikTok, and later to YouTube.

In its early phase, Holdtones did not possess a clear vision of pursuing live performances or market-oriented success. The group primarily focuses on producing instrumental content for digital platforms without explicit intentions to build a band identity in the conventional sense. However, as audience engagement

increases and content reception became more visible, internal discussions began to shift. One of members, Angga, initiated conversations about managing Holdtones more seriously as a musical entity. This marked a turning point where Holdtones began to envision long-term creative development, including the production of original works and strategic collaborations to expand their network and visibility.

The presence of Holdtones as an instrumental band, especially in brass band format, is still rarely found in the Indonesian music market, which is more filled with bands with vocalists or solo singers. Holdtones' choice to focus on instrumental music with brass band style shows courage and its own challenge in attracting market attention. In this case, branding strategies and positioning of their works are very important for Holdtones' sustainability. Their ability to arrange popular songs and regional songs with harmonization as attractively as possible could be an advantage. However, besides that, they certainly must have appropriate communication and positioning strategies to continue attracting the interest of listeners and music fans.

Holdtones offers a distinctive musical approach by presenting instrumental brass band arrangements of popular and regional Indonesian songs—an approach that remains relatively uncommon in Indonesia's mainstream music industry. Brass band traditions, historically rooted in England, function not only as performance ensembles but also as systems of musical training and collective musicianship that have influenced global music practices, including in Indonesia (Nabba'98, 1998). However, in the Indonesian context, brass instruments are typically used sparingly, often limited to a single saxophone or trumpet as a complementary elements in bands.

Holdtones deliberately foregrounds brass instrumentation as the core of its musical identity. By eliminating vocalist entirely, Holdtones shifts audience attention toward complexity, harmonization, and collective orchestration among multiple brass instruments (see Figure 1). The consistent circulation of their content across social media platform generated various forms of recognition, including endorsements collaboration with batik, shirt, and apparel brands. These digital achievements eventually translated into offline performance opportunities. Holdtones' first live performance took place at Taman Pintar Yogyakarta on 2024. Following this initial appearance, performance invitations expanded steadily, marking Holdtones' transition from a content-based project into an active live-performing ensemble.



Figure 1. Holdtones Brass Band performing as an instrumental ensemble.

This trajectory highlights how Holdtones exemplifies an alternative strategic model for independent musicians: beginning with content production rather than stage performance, leveraging digital visibility as primary capital, and using format innovation to avoid direct competition with mainstream acts.

Therefore, this research is important for understanding how bands with unusual formats can survive and develop in the Indonesian music world. By examining Holdtones as a case study, this research provides insight into how unconventional musical forms can generate sustainable opportunities outside dominant industry structures. Additionally, the use of regional music that is re-arranged in brass band style shows innovation in preserving culture, which can be an example for developing sustainable music industry development focused on local musical richness.

Holdtones – as a new band with a new format, faces great challenges in building listener awareness and loyalty. By analyzing their branding and positioning strategies, we can better understand market dynamics and current Indonesian music consumer tastes. This research is also very relevant for independent music industry players who are looking for alternative ways to compete amid the dominance of major labels and popular genres.

Understanding how Holdtones builds their branding identity and market positioning can be very helpful in developing policies for the music industry. Finally, this research is not only important for academics but also has real impact for developing a more diverse and sustainable music ecosystem in Indonesia. Finally, this research is not only important for academics but has real impact for developing more diverse and sustainable music ecosystem in Indonesia, while demonstrating how cultural preservation can be integrated into effective commercial branding strategies.

2. METHODS

Research on Holdtones' branding and positioning strategies as an instrumental band in Indonesian music market competition will use a qualitative approach with case study design. This method allows researchers to trace Holdtones' marketing strategies as brass band pioneers in facing the Indonesian music industry (Yin, 2018). The qualitative approach is used because it allows in-depth exploration of the context and process of forming Holdtones' branding and positioning strategies (Denzin & Lincoln, 2011). Thus, researchers can understand the complexity of this phenomenon from various perspectives by exploring subjective meanings from informants and interpreting data in broader social and cultural contexts.

The research was conducted in Yogyakarta, Indonesia, where Holdtones is based and actively produces musical content and performances. The primary object of this research is Holdtones as a musical group, with a specific focus on their branding and positioning strategies as an instrumental brass band operating in a highly competitive digital music environment.

Data collection techniques will be conducted through several methods. In-depth interviews with semi-structured techniques developed by Spradley (1998) with Holdtones band members. Participatory observation will be conducted by directly observing Holdtones' music practice and production processes, Holdtones' live performances, and Holdtones' interactions with audiences and fans on social media (Billups, 2022). Informants were selected using purposive sampling based on their strategic roles and direct involvement in Holdtone's creative and managerial processes. Two key members of Holdtones' were interviewed: Jimmy and Rizky. Both informants were chosen because they possess comprehensive knowledge of Holdtones' formation, strategic development, and interactions with audiences.

To complement interview data, this study incorporates digital ethnographic observation to examine audience reception and public engagement with Holdtones' content on social media platforms, including Instagram, TikTok, and YouTube (Pink et al., 2015). Rather than employing questionnaires or surveys, public responses were analyzed through observable engagement metrics such as the number of likes, shares, and comments, as well as the qualitative content of audience comments. These digital interactions are treated as naturally occurring data that reflect audience perceptions, visibility, and resonance of Holdtones' branding strategies. This approach does not aim to generalize public opinion statistically, but to understand patterns of audience engagement and meaning-making within digital cultural spaces.

Data analysis techniques will be conducted using the analytical approach developed Braun and Clarke (2008) with several stages: data familiarization, initial coding, code grouping, theme identification, and analysis integration into narrative using representative data. Data validity and reliability are conducted to ensure research credibility with triangulation strategies developed by (Denzin & Lincoln, 2011).

3. RESULTS AND DISCUSSION

The music industry in Indonesia is currently dominated by bands and solo singers performing various genres such as pop, rock, and dangdut – creating a very competitive market with much

competition and little difference between various products produced. In the current era of global music development, it indeed parallels driving society to tend to be "carried away" by the flow of modernization. Every musician continues to strive to create and refer to what is popular, which ultimately shapes music trends in the Indonesian music industry (Hidayatullah, 2017). Survey results conducted by Skala Survei Indonesia (SSI) show that public preferences for music genres continue to change, with dangdut and pop as the most preferred genres. This shows a clear picture of the dominance of bands and solo singers in the current music industry (Putri, 2023).

Within this competitive landscape, Holdtones adopts a contrasting approach by positioning itself as an instrumental brass band without vocalist. This strategic decision can be interpreted as a deliberate effort to avoid direct competition with mainstream bands, aligning with Kim and Mauborgne's (2019) concept of *Blue Ocean Strategy*, which existing market structures. Based on interviews with Rizky, one of Holdtones' personnel, the decision not to use vocalists is not just an aesthetic choice but also a deliberate positioning strategy:

"We chose the brass band format because we saw a market gap in the Indonesian music industry. Almost all bands rely on vocalists as their band's competitive advantage. We want to prove that instrumental music can also be accepted and enjoyed by the general public. This is our strategy to differentiate ourselves from the many emerging bands" (Rizky, 2025).

This finding resonates with Hracs (2012) who argue that independent musicians often adopt niche formats to escape saturated markets and construct distinctive identities. By removing vocals, Holdtones shifts the basis of value from lyric narratives to musical arrangement, orchestration, and collective performance—elements that are rarely foregrounded in Indonesia's popular music industry. However, the effectiveness of this strategy requires empirical validation through audience response surveys to measure listener acceptance of instrumental-only format compared to vocal-centric music. Future research should incorporate quantitative metrics such as: (1) listener satisfaction scores comparing Holdtones' instrumental arrangements versus original vocal versions; (2) demographic analysis of audience preferences for brass band format, and; (3) retention rates of followers across social media platforms as indicators of sustained interest.

Additionally, they also eliminate lyrics as a way to convey messages, and reduce dependence on musical instruments commonly used by bands in general. This aligns with what Aryandari (2024) says about the freedom of musicians to produce and distribute songs independently, releasing according to their content and desires. This strategy is one way for Holdtones to move away from direct competition with conventional bands. This elimination strategy mirrors findings from Wikström (2012) study on music industry innovation, which demonstrates that successful. Differentiation often involves removing conventional elements rather than adding new features.

"When there are no lyrics that can convey messages, we must rely on the power of arrangements. Every detail of harmony, dynamics, or musical progressivity must be carefully considered. It's like we want listeners to be able to 'hear stories' even without words. This also drives us to

continuously strive to create richer and more unique arrangements" (Jimmy, 2025).

This approach corresponds with branding theories that emphasize product depth and experiential differentiation as key factors in audience engagement (Duffy et al., 2019).

On the other hand, they also improve several aspects rarely noticed in the music industry, such as the complexity and richness of musical arrangements, more dominant focus on harmony and orchestration, and giving appreciation to regional music through more creative and innovative representation. This reflects what Kim and Mauborgne (2019) call Blue Ocean Strategy – a concept that emphasizes the importance of creating new markets without competitors, so they can offer a unique and different product.

Besides that, Holdtones emphasizes the "create" approach by presenting brass band experiences rarely found in Indonesia, and presenting reinterpretations of popular and regional songs in brass format. They create a unique combination between regional song nostalgia with modern approaches, while building different identities as instrumental bands in an industry landscape still dominated by bands with vocalist advantages.

Holdtones' journey as a brass band is inseparable from social media's role in building their existence. Unlike bands in general that start their careers from stage to stage, Holdtones chose the opposite path by maximizing digital platforms as a stepping stone. Since being founded in 2020, they realized that for the brass band format they have, it would be difficult to immediately get stages without first building existence on social media, especially since that time was the COVID-19 period. Therefore, they decided to focus on creating content on Instagram and TikTok, consistently uploading cover videos of popular songs and regional songs in brass band format rarely found on those platforms.

"Through Nusantara songs that we arrange, we also realize this becomes one form of education for society. At minimum, it must contain the song's regional origin and the philosophical meaning behind it. For example, like the song 'Ayam Den Lapeh' that we uploaded to our TikTok and Instagram accounts. We use social media as the main platform, because with that approach we can build relationships with audiences who might not yet know the type of music we play" (Rizky, 2025).

This cultural approach is also reflected in audience reception. Viewer comments explicitly associate Holdtones' performances with the preservation of Indonesian musical heritage and local cultural identity, suggesting that digital audiences recognize and value this reinterpretative strategy (see Figure 2).

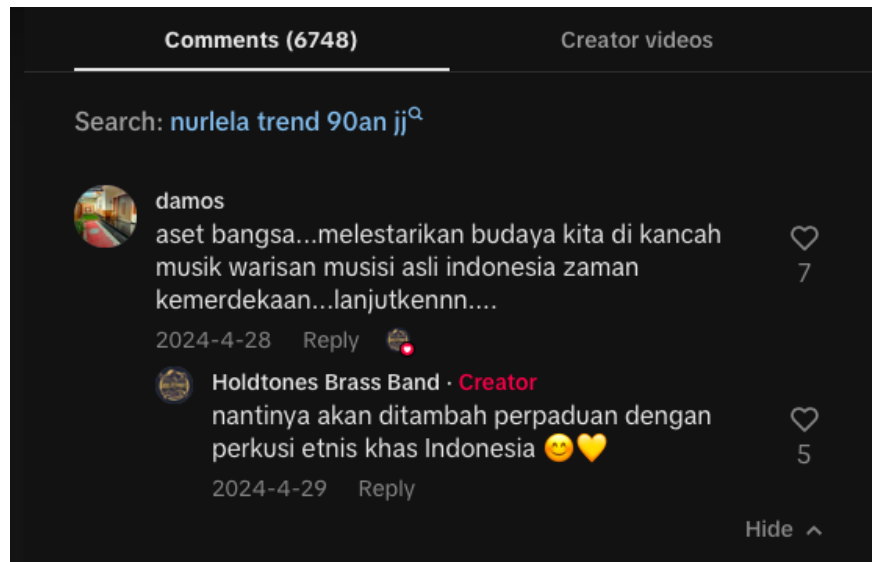


Figure 2. One of viewers' comments

The effectiveness of Holdtones' branding strategy is empirically observable through digital engagement metrics on social media platforms. One of their TikTok videos reached over 16 million views, accompanied by a high number of likes, shares, and audience comments (see figure 3 and figure 4). These metrics function as quantitative indicators of audience reach and resonance, commonly used in digital marketing and cultural production studies as proxies for visibility and engagement (Anderson, 2020; Morris & Powers, 2015).

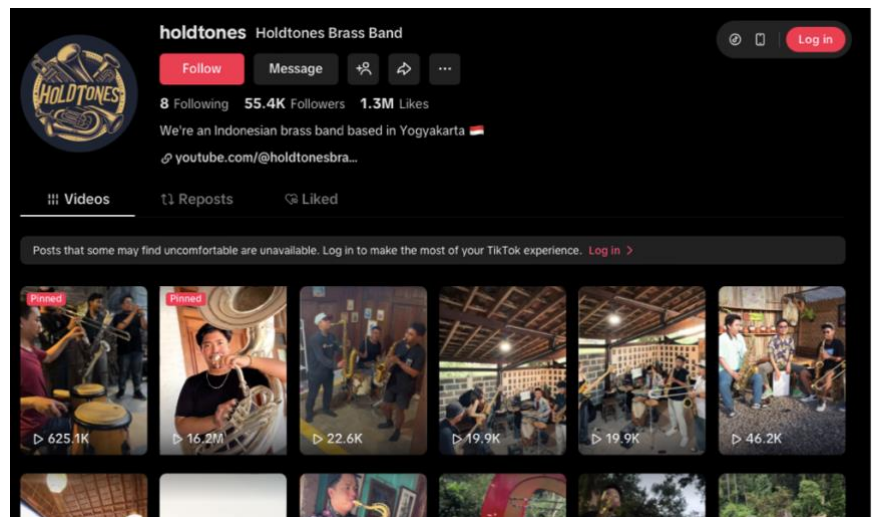


Figure 3. Holdtones' TikTok account dashboard

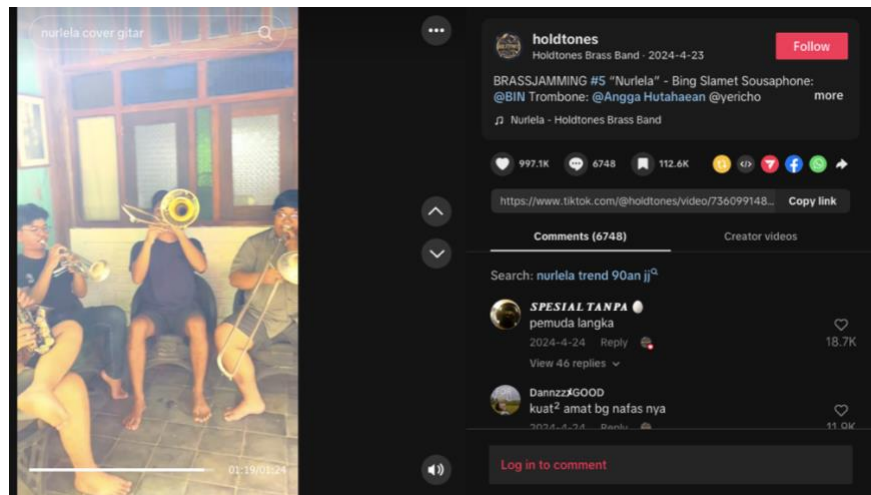


Figure 4. Number of Like, shares, saves, and comments on video titled "Nurlela"

Beyond numerical indicators, qualitative analysis of audience comments reveals recurring themes such as appreciation for instrumental complexity, novelty of brass arrangements, and emotional resonance with regional song reinterpretations. This combination of quantitative engagement data and qualitative comment analysis strengthens the validity of claims regarding branding effectiveness without relying on survei-based generalization.

This social media virality then opened opportunities to perform on various stages, such as Merona Fest Yogyakarta 2024, Festival Kebudayaan Yogyakarta (FKY) 2024, and FESTA 2024, as well as endorsements received by Holdtones in early 2025. This shows the effectiveness of the initial strategy they built as a non-conventional band group in the realm of music competition in Indonesia. This trajectory aligns with Aryandari (2024) findings that digital platforms increasingly function as primary gateways for independent musicians to access professional opportunities beyond traditional industry channels.

Although Holdtones now often performs on various stages, they still do not forget their digital roots. Every stage performance is well documented for social media content. According to them, this will create positive feedback.

"Quality content enables generating more performance offers, while good performances produce more attractive content" (Rizky, 2025).

The strategy undertaken by Holdtones in branding themselves has several strategic advantages. Low direct competition due to the lack of brass bands in Indonesia gives Holdtones room to develop without intense direct competition. The brass band format provides clear and easily recognizable advantages, allowing them to build a fan base, even on social media.

Their efforts to reinterpret regional songs also provide a strategic position as a contribution to cultural preservation – becoming valuable added value in the social and cultural context in Indonesia.

The main challenge to what Holdtones does actually lies in the listeners themselves. Holdtones needs to make more effort to educate listeners about the value and uniqueness of the brass band format. Additionally, the format involving many personnel can also

limit flexibility and ability to develop, while their position as brass band pioneers requires them to continue innovating to stay superior. Jimmy – one of the melody players at Holdtones confirms this:

"Collective work with seven people with different instruments is certainly not easy, both in terms of practice and management. Not to mention for performances - not necessarily in one event, all personnel can participate. Some of us might already have other schedules outside the invitations we receive. This finally forces us to look for additional players who can also blend with the performativity we build" (Jimmy, 2025).

Based on this, Holdtones can apply several strategic approaches. For example, collaborations with local and traditional musicians that might strengthen their position as a bridge between traditional and modern music, and open wider networks. Additionally, content marketing showcasing the creative process related to arrangements can help educate listeners about the unique value they offer.

Holdtones' struggle from social media to stages also reflects the evolution of modern marketing strategies in the music industry. Holdtones is an ideal example of how musicians in the digital era can utilize social media algorithms to enter markets that have been dominated by major labels (Aryandari, 2024). They successfully built a strong narrative about cultural preservation through reinterpretation of traditional music in brass band format, which becomes their selling point. More interestingly, they managed to transform digital popularity into presence and demand in the real world. Similarly, Bonini & Gandini's (2019) work on algorithmic culture in music shows that understanding platform logics becomes crucial competitive advantage—a capability Holdtones demonstrates through consistent viral content production.

This analysis shows that Holdtones has successfully created a new space in the Indonesian music industry market, through brass band format and creative approaches to popular songs and regional songs in the archipelago. The sustainability of Holdtones' strategy will depend on Holdtones' ability to innovate, expand fans, and maintain their uniqueness while adapting to continuously changing trends. In fact, Holdtones not only has opportunities to survive in the Indonesian music industry but also becomes a path opener for other musicians who want to explore alternative formats and approaches in their work.

In fact, Holdtones not only has opportunities to survive in the Indonesian music industry but also becomes a path opener for other musicians who want to explore alternative formats and approaches in their work. This potential industry influence aligns with Hesmondhalgh & Meier (2018) work on independent music's transformative role, where successful niche innovations can reshape industry norms and inspire format experimentation. However, empirical validation of this claim requires ecosystem-level analysis tracking format diversification trends in Indonesian music post-Holdtones emergence.

4. CONCLUSION

The branding and positioning of Holdtones – a brass band from Yogyakarta has successfully created a new and unique space in the Indonesian music industry. Through an approach that prioritizes brass band format and creative reinterpretation of

popular songs and regional songs, Holdtones has strategically positioned itself outside the usual competitive arena.

Holdtones' success in this context is evident from its ability in several aspects – by eliminating conventional elements such as vocals and lyrics, and increasing appreciation for regional music, creating different musical experiences that allow Holdtones to avoid competition with conventional bands and create unique value propositions for listeners.

Holdtones' sustainability in the music industry will depend on their ability to continue innovating, expanding fans, and maintaining the unique value they offer. This case study shows that Holdtones' strategy can be an effective strategy for independent music industry players to survive and develop amid conventional format dominance. Furthermore, the strategy undertaken by Holdtones also illustrates how local cultural preservation through reinterpretation of regional music can become an important component in building strong and sustainable branding and positioning in Indonesia's creative industry.

Based on the findings of this study, several practical and applicable strategies can be proposed for independent musicians seeking alternative pathways within competitive music markets. First, independent musicians may consider format-based differentiation as a strategic foundation. Second, this study suggests the importance of adopting a digital-first orientation. Third, audience engagement should be understood as a strategic resource. Fourth, the findings indicate that strategic collaborations, including collaboration with public figures, artists from different fields, or cultural actors, can function as network-expanding mechanism.

Finally, incorporating local or cultural elements into musical production can serve both artistic and strategic purposes. Reinterpreting regional or traditional music within contemporary formats enables independent musician to construct meaningful narratives that resonate culturally while simultaneously strengthening market positioning.

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