

Disruptive Potential: COVID-19 and Emerging Live Music Models in Trinidad and Tobago

*Potencial disruptivo: COVID-19 y modelos emergentes
de música en directo en Trinidad y Tobago*

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Resumen: Este estudio explora el impacto de la pandemia de COVID-19 en el sector de la música en directo en Trinidad y Tobago. Comienza con una evaluación del panorama internacional, antes de yuxtaponerlo con las realidades locales. La investigación se ocupa de evaluar la disrupción que afecta a los modelos de música en directo, en el contexto de posibles estrategias de respuesta para la isla del Caribe Sur. Para este estudio se adopta un enfoque de investigación cualitativa respaldado por una estrategia de investigación de estudio de caso. Se seleccionaron deliberadamente seis participantes, cada uno de los cuales operaba en diversos focos y nichos del sector de la música en directo del país. El estudio descubrió que la interrupción se debió a cambios en la cadena de valor que

resultaron del distanciamiento social y los límites en reuniones públicas como conciertos. También se señaló que, aunque los cambios fueron rápidos, los empresarios locales de música en directo pudieron brindar alternativas preliminares para involucrar a los aficionados. Sin embargo, para que sean sostenibles a largo plazo, se debe prestar mayor atención a la creación de diversas experiencias interactivas de música en directo. Esto también debe ir acompañado de una mayor monetización mediante la utilización de tecnologías fáciles de usar.

Palabras clave: música en directo, modelos de negocio, Trinidad y Tobago.

Abstract: This study explores the impact of the COVID-19 pandemic on the live music sector of Trinidad and Tobago. It begins with an assessment of the international landscape, before juxtaposing it with local realities. The research is concerned with assessing the disruption affecting live music models, within the context of possible response strategies for the Southern Caribbean island. A qualitative research approach supported by a case study strategy of inquiry is adopted for this study. Six participants were purposely selected, each operating within various foci and niches in the country's live music sector. The study found that disruption was due to changes in the value chain which resulted from calls for social distancing and limits on public gatherings such as concerts. It was also noted that although changes were rapid, local live music entrepreneurs were able to provide preliminary alternatives to engage fans. However, for these to be sustainable in the long run, greater attention needs to be apportioned to the creation of diverse interactive live music experiences. This must also be accompanied by expanded monetization through the utilization of user-friendly technologies.

Keywords: live music, business models, Trinidad and Tobago.

Fecha de recepción: 1/6/2020

Fecha de aceptación: 9/8/2021

INTRODUCTION

COVID-19 and the international music industry

Recently, global economies have been immensely impacted by the virulence of COVID-19. The disruption associated with the current outbreak has shifted industry structures, as organizations across vulnerable sectors have experienced sudden and substantial declines in revenues. This has led to managers exploring responsive strategies to meet financial and contractual obligations (Craven *et al.*, 2020). Further to this, there has been radical changes to business models, specifically the adoption of reactive steps by firms to mitigate significant losses. Tactics employed have comprised, securing supply chains, reducing employee workload and instituting work from home arrangements, as well as the institution of cost cutting mechanisms and accessing the financial intervention of governments (Wade and Bjerkan, 2020).

The realities of the international music industry largely reflect the situation in the wider business community. Firms in the recorded music and publishing sectors have had to grapple with changing consumer behaviors and the need to adapt operations accordingly. For instance, Mulligan, (2020) points out that with the closure of recording studios and delayed project release timelines, there could be disruptions to the recorded music supply chain. However, there are positives for independent artists who are now poised to get ahead by releasing music more frequently and consistently than established label artists can. Conversely, in the music publishing realm, Gilbert (2020) highlights that music supervision has transitioned from a steady flow of

income from TV, Film and advertising productions, to a sporadic trickle of music-related briefs since COVID-19 became prevalent.

While there has been a clear impact of COVID-19 on the recorded music and publishing sectors, it is the live music sector that has experienced the highest level of disruption. Cancellations and postponement of live music events, ranging from technology conferences to major concerts have been ubiquitous (Billboard Staff, 2020). Accompanying these have been refunds to ticket holders, which placed added pressure on major ticket distributors such as Ticketmaster. In response to the challenges, the company had to furlough twenty five percent of its team, as part of a broader plan to cut \$500 million in expenses (Smith, 2020).

The Trinidad and Tobago situation

The COVID-19 crisis arrived relatively late in the Caribbean region, with the first confirmed case in Trinidad and Tobago being reported on March 12th 2020 (IDB 2020: 18). This development was followed by stringent action by the country's government to diminish the spread of the virus, which included calls for social distancing and limits on public gatherings. Synonymous to the international situation, there was an immediate adverse impact on the local live music sector as concert cancellations became prevalent and stakeholders at multiple points of the music value chain had to deal with economic uncertainty and loss of income (Baptiste 2020). The music industry in Trinidad and Tobago and by extension the Caribbean region, is largely driven by the islands' live music sectors. In Trinidad and Tobago, this can be attributed to the strong association of the music industry to the annual Carnival festival (Nurse *et al.*, 2007: 25). Hence, the country's music community had to derive methods to adapt current modes of operations that would allow the live

sector to continue functioning.

While it is easy to witness the impact that the pandemic has had on the local and international music industry, it is important to document the manner in which business models have had to evolve in response. Specifically, how has the traditional functioning of the live music sector on the island changed, what changes have been made to the value proposition of firms, cost and revenue structure, key players, the potential for monetization, the role and functions of technology and finally the potential long-term impact of these on the growth and development of the sector.

LITERATURE REVIEW

This review inductively examines key ideas on disruption in the business sector because of COVID-19, with special focus on the impact of the pandemic on the live music sector. It begins with a discussion of the business model concept, before outlining the traditional models of operation in the sector. It is then followed by an analysis of how businesses generally respond to disruption, which is then juxtaposed with results from the live music sector in developed countries. Finally, core gaps in the literature are evaluated to contextualize the research questions.

While the growth of the business model concept is often linked to the rise of the new economy between 1998 and 2001, the use of the term predates this era (Wirtz, 2019: 3). A firm's business model explains the manner in which it is positioned within a value network or supply chain and its process of turning inputs into outputs while fulfilling its goals (Ritter and Lettl, 2018: 6). It is the skillful organization of the core elements of a company's business model that enables it to be profitable and sustain itself. Hence, sudden changes can be challenging and even detrimental if not well managed.

The value network in the live music sector

The live music function is focused on distribution and monetization of musical performances. Fundamental value creating activities involve: promoters (buyers) booking live performers (a commodity) from agents and managers (sellers) and in turn, packaging these for presentation at a venue (the marketplace) where the concert-goer (end-user) will consume it (Waddell *et al.*, 2010: 2). In evaluating the value network in more detail, (Tschmuck, 2017: 119) explains that the promoter generates a concept for a live music event and is responsible for contracting the artist as well as engaging in publicity and promotions to drive ticket sales. Concert promotion embodies significant risks as promoters must make upfront investments but are unable to adequately predict whether ticket sales will cover costs, or some unforeseen event may force an all-out cancellation. In a similar manner, the venue operator enters into an agreement with the promoter, which delineates the services provided by the venue. Consideration for this deal usually takes the form of the promoter paying a fixed rental fee, or one that is based on a percentage of ticket sales. In addition to the sale of tickets, other sources of revenue for venues include: ancillary income from parking fees and sales of food and beverage (Tschmuck, 2017: 121).

As it pertains to the live music sector of developed countries, booking agents are the link between the artist and promoter. Their role usually embodies live performance opportunities for the artist and assisting them with travelling and accommodation arrangements (Hull *et al.*, 2011: 157). One fundamental difference between practices in the Trinidad and Tobago and international music industries is the low popularity of booking agents. Whereas in the United States of America it may be illegal in states such as New York and California for an Artist Manager to book shows on behalf of their client (Waddell *et al.*, 2010: 19), in Trinidad and Tobago there are no such legislative prohibitions

and artist managers are usually responsible for negotiating and securing live performance opportunities.

The final aspect of the value network of the live music sector deals with the area of support services and ticketing. The live business depends on support services that are either provided by the venue operator or subcontracted by the promoter (Tschmuck, 2017: 124). Support services are crucial to the success of the event and include: streaming and broadcast preparation, sound engineering, logistics, Special effects, catering and physical and digital ticketing (Rutter, 2016: 64-67).

Assessing the impact of COVID-19 on business models

Ritter and Pedersen (2020) suggest that a company should explore four core dimensions of its business model to determine how it is being impacted by the COVID-19 pandemic. Firstly, an assessment needs to be undertaken of how the crisis will affect customer demand. Related questions should explore the extent to which demand and spending patterns may change and if new delivery channels need to be explored. Similarly, there should be consideration of emerging customer groups and whether the virus creates future safety concerns if business were to return to normal.

Considering the impact of the pandemic on customer demand, firms then need to brainstorm how the crisis affects its value proposition and value demonstration. As Teixeira and Piechota (2019) point out, customers drive disruption. Therefore, to be successful in disruptive environments firms are required to identify and serve emerging customer needs more efficiently. For example, managers will need to understand whether customer needs will continue to be satisfied by the current configuration of products and services or if new methods to demonstrate value are required. The needs of the customer need to continue

being met through differentiation from the competition (Ritter and Pedersen, 2020). Finally, the organization must review its capabilities to ensure that they match those required to function within and in the immediate post-crisis environment. This will require having the people, resources and technology that would enable the firm to continue its operations. Following an analysis of the COVID-19 pandemic on customer demand, value proposition and demonstration and capabilities; it is now possible to develop strategies to align company operations in a manner that allows it to respond effectively.

Strategies for responding to COVID-19

Pisano (2019: 25) makes the point that innovation is change that creates economic value. It may be concerned with technological change, business model change or frequently, some combination of both. Therefore, by creating innovative offerings, while reshaping business models, firms can respond to evolving environments. Along similar lines, (Wade and Bjerkan, 2020) identified three generic response strategies to match organizational infrastructure with emerging market trends. They suggest that organizations that are flexible enough to adjust their infrastructure, product or service portfolio or their route to market can benefit from significant opportunities in times of crisis.

One such strategy as outlined by Wade and Bjerkan (2020) is to offer the same (or similar) products and services through an online channel. This may occur through the digitization of physical products or, in the case of services, through a technology-mediated delivery solution. One example of this strategy in the live music sector is evident in Latin American countries, where several live performers have started offering live online music classes to students and teachers (Cobo, 2020).

Another strategy that firms can use to respond to the COVID-19 pandemic is that of deploying existing infrastructure to produce different products or to offer new types of services. For instance, while recording studios and music venues are currently under-utilized, the demand for streaming concerts and music have remained consistent and in some cases, grown. Frankenberg (2020) uses data from the live music industry to point out that musicians have demonstrated continued use of livestream platforms to stay busy and connected to fans. The number of livestream events added to online platform *Bandsintown.com* between April 22-28 2020, rose to a weekly total of 3,109 and the platform reported a total of 12,360 livestreams by 5,304 artists over 35 days (March 25-April 28).

Finally, with the sudden struggle to meet the demand for their products and services, some companies need to quickly augment their infrastructure to increase production and delivery capacity. In sharing cases from Cuba, Cantor-Navas (2020) points out that with citizens adhering to stay at home restrictions, demand for musical performances increased. This led to increased collaboration of stakeholders at multiple points of the value chain to collaborate on producing online content ranging from concerts to musical tuition to meet national demand.

Experts such as Tschmuck (2017), Waddell *et al.*, (2010) and Hull *et al.*, (2011) undertake a detailed exploration of the intricacies of the live music value chain from an international perspective. In the process, they provide a solid framework that can be used for assessing the structure of the Trinidad and Tobago live music sector. Likewise, Ritter and Pedersen (2020) and Wade and Bjerkan (2020) provide practical considerations for determining the impact of COVID-19 on business models and crafting appropriate strategies to navigate forward. While these authors may have achieved their desired outcomes, it is important to

document the impact of COVID-19 on the live music sector of Trinidad and Tobago. Specifically, studying the business models that have emerged during the crisis is important for charting the course forward to guide firms with adapting operations and achieving long run, sustainable development.

METHODOLOGY

Research questions

This study seeks to answer the following research questions:

- RQ1: How has COVID-19 disrupted business models in the Live Music Sector of Trinidad and Tobago?
- RQ2: How can live music firms leverage new business models in the Post COVID-19 Era?

Research approach

A qualitative research approach supported by a case study strategy of inquiry was chosen for this study. The qualitative approach provides a foundation for evaluating the emerging nature of change in the Trinidad and Tobago live music sector due to COVID-19. Additionally, it allows the topic to be probed, when the variables and theory base are unknown as is currently the case in developing countries (Creswell and Creswell, 2017:179). In conducting a study of how firms reinvent business models as a strategy to cope with disruption, Volberda and Heij (2017: 21) included a qualitative strand to their research as a means of gaining insights into the underlying processes, inhibitors and the role of management in helping firms respond to disruption. Since the goal of this research is to develop a portrayal of the impact of COVID-19 on the live music sector and the experiences of stakeholders, this approach is appropriate.

Conversely, the case study strategy of inquiry was employed because it facilitated expanding theories by combining the current theoretical knowledge with new empirical insights (Yin, 2003: 72). This was valuable to the study as it has not attracted previous research attention. The case strategy is useful for expanding the local boundaries of the investigated cases, capturing new layers of reality and developing new, testable and empirically valid theoretical and practical insights (Vissak, 2010: 380).

Research methods

Four research methods were used to derive the information required to answer the research questions. These included self-administered structured interviews (Lavrakas, 2008: 804), non-participant observation, document and audio-visual and digital materials review (Creswell and Creswell, 2017: 188). In terms of the self-administered structured interviews, twenty open ended questions were prepared in the form of a questionnaire and administered to the participants using Google Forms. As many industry professionals are busy, this facilitated a convenient response timeline as participants could respond when they had time. The digital format also assisted with preliminary compiling and coding of the data. The content for the open-ended questions were informed by a document analysis which was undertaken using a standard case study protocol. The analysis covered the period March 1st 2020 to April 30th 2020 and included an evaluation of media articles and social media posts relating to the events held during the lockdown period. The researcher also undertook non-participant observation which involved field notes on the activities of participants and firms. In addition to these, documents, and audio-visual and digital materials such as social media posts were also analysed. The four research methods contributed to triangulation and assisted making in-

terpretations about the research (Eisenhardt and Graebner, 2007: 25-32).

Sampling, recruitment and ethics

(Eisenhardt, 1989) suggests that the study of between four and ten cases contributes to saturation and usually works well for theory generation. To meet this requirement as well as to not be overburdened with data collection, six participants were purposively selected for the self-administered structured interviews. They were chosen due to media coverage and the researcher's knowledge of their involvement in the promotion and participation in live music events during the COVID-19 pandemic lockdown period.

Participants included Colin Greaves, an executive at mobile telecommunications company, *Digicel* which sponsored a series of online concerts during the COVID-19 lockdown period. In addition to him, Nigel Campbell, an industry journalist and promoter of *Jazz Artists on the Greens*, which was cancelled due to the pandemic was also included. Additionally, the views of music publicist and manager Adanna Asson was also obtained. She works with Patrice Roberts, one of the country's leading Soca music artists, who also held an online concert during the lockdown period. To get the Gospel music perspective, promoter and manager of Aspire Management, Afiya Cunningham, was invited to share her experience gained from promoting a series of online *Quarantine Concerts*. Finally, the views of Trevor G, an independent artist and producer, as well as Sherwin Cooper a Steel Pan Musician, were obtained to gain the independent performer perspective.

The participants were contacted via telephone and asked to participate in the study. Once they agreed, they were sent an email with the link to the questionnaire. The researcher then

followed up with the respondents to seek clarification of any responses that may have been ambiguous. In the instructions of the questionnaire, participants were advised that quotations may be used in the study which can be attributed to them and by participating they agreed to be identified.

Data analysis

The data analysis consisted of three actions: categorizing strategies, connecting strategies and memos and displays. The categorizing strategies began with fracturing the data from the interview transcription into codes and themes and rearranging them into categories. This was done so that comparisons could be made between categories and data derived from both existing theory and those inductively generated during the research (Strauss, 1987: 29). In addition to this, connecting strategies were used to attempt to understand the information from the interview transcript and documents. This was achieved by identifying the relationships among the different elements of the text and developing case studies (Maxwell, 2005: 52). Finally, memos were used frequently during the data analysis process as a reflection tool to stimulate and capture personal ideas about the data. They helped to facilitate thinking about relationships in the data and make ideas and analyses visible and retrievable. Finally, displays which include tables and concept maps were used to present and analyse data in a visible manner.

Validity

Three techniques were used to contribute to validity of the study. Firstly, respondent validation or member checking was used to gain feedback about the data collected from the participants in a systematic manner. This helps to clarify what the participants said, while guarding against personal biases

(Bryman, 2003: 77-79). Similarly, triangulation was also pursued whereby data was collected from four core sources. This reduces the risk of chance associations and systematic biases due to a specific method and allows a better assessment of the generality of the explanations developed (Fielding and Fielding, 1986: 62). Finally, Eisenhardt and Graebner (2007: 25-32) recommend that increasing the number of cases from the same or different countries or industries. For this reason, six participants, representing five different perspectives were selected. This data was then supported by secondary data on the impact of COVID-19 on the live music sector of developed countries.

FINDINGS AND DISCUSSION

This section presents the findings of the study. Each research question is considered in turn and the related findings presented.

RQ1: How COVID-19 disrupted business models in the Live Music Sector of Trinidad and Tobago

From the perspectives put forward by the participants, COVID-19 caused sudden changes to the live music business operations of firms and artists in Trinidad and Tobago. The need for key players in the sector to reshape business models in response to changes in the value chain, underscored the significance of the pandemic. As independent artist Trevor G highlighted, for the most part activities in the creation phase-illustrated in figure 1 of the value network, continued unhindered throughout the lockdown period. However, all participants lamented the closure of event venues and the resulting cancellation of previously planned live music events. This fall in performance opportunities was positively correlated to the decline in revenue streams and is also consistent with the views of Mul-

ligan (2020) who explained that the lockdown period allowed more time for creative activities, while simultaneously placing musicians in a financially stressful position.

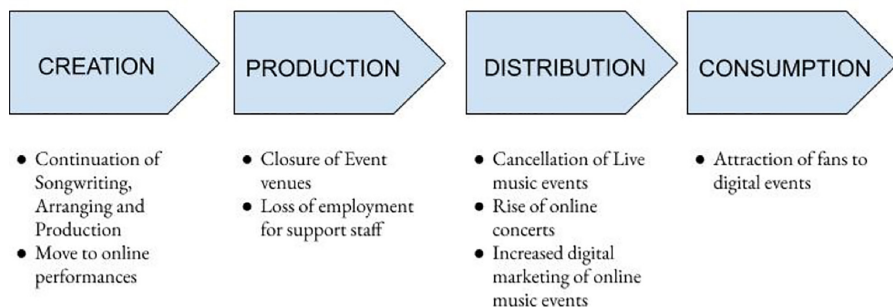


FIGURE 1. Fundamental changes to the live music value chain in Trinidad and Tobago due to COVID-19.

It was not all negative news in Trinidad and Tobago though, as those most impacted by the pandemic quickly altered their value propositions by developing new concepts to keep their fans engaged. Mobile Telecommunications Company Digicel, made significant investments in the local artistic community by quickly moving its *Cameo Concert Series* to the online domain. The popular venture comprised the hosting of two online concerts per week, for which the company covered performance fees for the featured acts, as well as technical production costs. Digicel executive Colin Greaves pointed out that the objectives of the series were threefold: support for the creative sector, relief and escapism from the stress associated with COVID-19 and provision of financial relief for artists.

Commenting on Patrice Robert's online live concert, publicist Adanna Asson said that the show was offered as a token to keep fans engaged. Her perspective was similar to that of Afiya Cunningham of Aspire Management who promoted the *Quarantine Concert Series* featuring some of the leading gospel

artists in the country. Both groups of artists were remunerated for their performances. The independent artists organized smaller shows but did not receive remuneration. The experiences of the participants are aligned with the assertion of Teixeira and Piechota (2019) that satisfaction of the needs of customers is central to the response to disruption. As a generic strategy in dealing with disruption brought about by COVID-19, the live music entrepreneurs have also followed the advice of Teixeira and Piechota (2019) as well as, Wade and Bjerkan (2020) to offer existing products (live performances) in the online domain.

Social media promotion was the most popular technique for all the participants. For larger entities like Digicel, they were able to adopt 360 multichannel and omnichannel approaches inclusive of a combination of: digital ads, traditional press, PR, digital apps, live performances, artiste endorsements, and word of mouth. In each case, social media messaging was supported by colourful and professionally designed digital flyers. These were shared via various social media channels prior to all shows and then widely disseminated by fans and well-wishers.

Monetization of the online live events was identified as the main concern for stakeholders. Whereas some performers were able to secure performance fees for their work, extracting monetary revenue from fans has not been the focus thus far. Nigel Campbell stated that, «local audiences have to be “trained” to pay for online events beyond Netflix». His comment alludes to the growing use of the popular movie streaming service in Trinidad and Tobago and the need for local music entrepreneurs to develop mechanisms for monetizing content online. Adanna Asson however, shared a contrasting viewpoint that performing in the absence of a live audience is a mental task for performers and many prefer to avoid adopting online concerts as an income earning option because of this discomfort.

RQ2: How live music firms can leverage new business models in the Post COVID-19 Era

Moving forward, stakeholders in Trinidad and Tobago's live music sector will have to explore new digital methods for showcasing and monetizing performances in the post COVID-19 era. The viewpoints of all of the participants emphasized three perspectives: the use of web platforms supported by livestream technology to engage fans virtually, the need for improved and custom platforms and the critical requirement to monetize local live music content through digital means. Colin Greaves indicated that Digicel is already heading in this direction with its intention to integrate more digital concerts into its PlayGo and D'Music apps. The company is also considering expansion of the reach of its online concerts into more pay-per-view scenarios as a means of shaping them into formats more sustainable and attractive to artists.

Discussions with the participants revealed that they have an idea of what should be done to propel their live music business forward. However, they are still exploring various approaches. Figure 2 illustrates a model for possible consideration. The model represents a flow of commercial activities around future live music experiences. At the core, is the need for the development of a diverse selection of live music experiences. While the trend thus far has been online concerts, there exists a need to examine the international environment for opportunities that could expand the borders of indigenous local music. For example, Webster (2020) addresses the immersive and innovative Travis Scott concert which was hosted during the lockdown period in the Fortnite game. Trinidad and Tobago music entrepreneurs should explore methods for attracting niche audiences to non-traditional live content such as video games, augmented and virtual reality technologies.

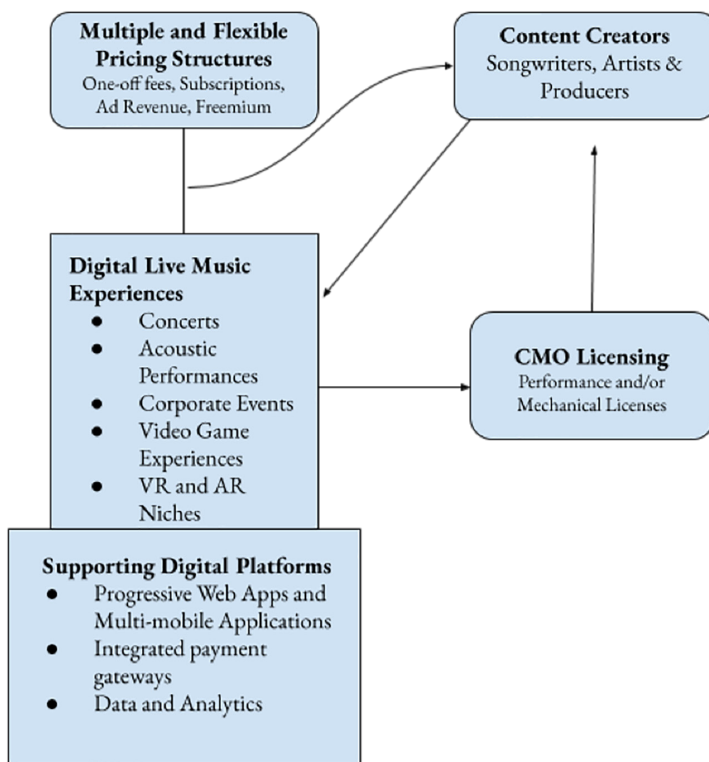


FIGURE 2. Potential Model for Digital Live Music Showcase and Monetization.

In addition to diverse live music content, the platforms used to host and deliver this content also needs to be addressed. For many participants, a key consideration is to create branded platforms. This can be achieved using Progressive Web Apps (PWA) which provide a platform agnostic app-like experience to the largest possible number of users. This may also be ideal for a developing country since users can access PWAs without an internet connection or in some instances of spotty network coverage (Si Digital 2020).

The desire for monetization was a common theme for all participants in the study. Such functionality should be inherent in any platform selected to showcase local content. To move beyond free shows, live music entrepreneurs need to explore multiple and flexible pricing structures. Pricing models must move beyond fixed price thinking to consideration of a combination of freemium, pre-roll, mid-roll and display advertising and subscription structures for monetizing music. The pricing models must be implemented using appropriate payment gateways and processing technologies.

Uncertainty with respect to the licensing of performance and mechanical rights in the online environment, was typical among participants in the study. Apart from *Jazz Artists on the Greens* which had re-broadcast rights covered in previous contracts with artists, the other events did not obtain any licenses from Collective Management Organizations (CMOs). Digicel's Colin Greaves pointed out that «accessing accurate and reliable information locally about securing licenses for this new realm of digital free concerts during COVID-19 has been slow», however, he said that the company pursues licensing of on-demand content for its various apps through third party providers such as Kuack Media. The complexity associated with the legal features of livestreaming is consistent with those explored by (Hu, 2020). However, moving forward there needs to be more efficient handling in the form of transparent information on multi-territory licensing and tariffs to enable the Trinidad and Tobago live music sector to grow online.

CONCLUSIONS

This study highlights that the core disruptions in live music business models due to COVID-19 occur because of changes to value chains and revenue structures. With limits on public

gatherings, live music entrepreneurs in Trinidad and Tobago experienced significant declines in revenues, whereas fans lost access to avenues for entertainment. While this may be the case, the live music community has flaunted its resilience by creating alternative musical offerings to engage its fans using technology. The study suggested a few strategic actions that can be taken towards sustainability. Hence the six core participants provided a combination of personal insights and diverse perspectives exploring how they were being affected. From the foundation of this work, future quantitative studies can be designed to measure the impact of COVID-19 on the wider music sectors. Specifically, the changes in revenue in the recorded music and music publishing sectors, response of fans to increased adoption of pay-to-play online live music events and even testing the efficacy of the models proposed here.

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