

**The South African live events, technical and production services industry's market
position and COVID-19 funding implications**

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Abstract

COVID-19 has had a significant economic impact on a global scale. The national lockdown, enacted through the Disaster Management Act 57 of 2002, disrupted multiple economic activities, including that of the Creative and Cultural industries. In the performance and celebrations domain, under which live events (i.e., theatre and performance) and technical production services (i.e., technical support and services for theatre and performance) resort, the postponement or cancellation of events in the face of the pandemic had a devastating effect on lives and livelihoods. An initiative called #LightSared, initiated by the South African Communications Industries Association (SACIA) and the Technical Production and Services Association, was one of the private initiatives aimed at extending financial relief to those who earn a living in the technical production and live events industry. However, the lack of reliable data about the industry's market and the impact of COVID-19 was a significant challenge in resource development and allocation. In response, the Sun Circle Group, a media company that services the live entertainment and professional audio-visual industries in South Africa,

conducted an extensive online survey of businesses in this industry. For this study, permission has been obtained from the Sun Circle Group to analyse the secondary data set. Situated within the literature on the creative economy, analysing the secondary industry data in this article offers an understanding of the market position and perceived financial implications of the COVID-19 pandemic on the Live Events, Technical and Production Services industry. The results of this research support advocacy for a long-term national strategy to secure livelihoods and the sustainability of not only the Live Events, Technical and Production Services industry, but the CCIs as a whole.

Keywords: Live events; technical and production services; COVID-19; marketposition; funding implications

Introduction

COVID-19 has had a significant economic impact on a global scale. In South Africa, as in many countries world-wide, national lockdown measures to curb the spread of the disease was announced, enacted through the Disaster Management Act 57 of 2002 (Robinson, 2021). On 26 March 2020, the national lockdown in South Africa disrupted multiple economic activities, including the postponement or cancellation of events (Perrolt, Hatting & Bruwer, 2020: p. 1), as only essential services could continue with operations. COVID-19 had a devastating impact on the South African creative economy. The cultural and creative industries (CCIs), relying strongly on face-to-face modes of production and engagement, project-based modes of production in varied parts of the sector, the extent of freelancing and informal occupation

(SACO, 2022:2), as well as the human mobility associated with the CCI's, were vulnerable to economic shifts and to the restrictions set in place to contain the pandemic. The Performing Arts and Celebration domain of the CCIs in particular so (SACO, 2020a: p. 4). With regards to the performing arts domain of the creative and cultural industries, UNESCO described the impact of COVID-19 as “a cultural emergency” on a global scale (2020a).

Live Events, Technical and Production Services resort under the Performing Arts and Celebration domain of the CCIs. The scope of the Live Events, Technical and Production Services (LETPS) is wide as it covers a broad spectrum of event-related activities involving multiple technologies. Live events (for example theatre), technical and production services (for example technical supplied and support for theatre) are integral to many other sectors and domains, for example tourism, education and hospitality. The LRTPS industry represents a collective of privately-owned businesses whose activities involve planning, producing, and implementing live events (Robinson, 2021). The industry is primarily involved in the planning and implementing of the technical aspects of live events, including but not exclusively, theatre productions, conferences, exhibitions, product launches, religious gatherings, political rallies, corporate activations, state ceremonies, sporting events, community gatherings and entertainment events. According to Robinson (2021) the South African Live Events, Technical and Production Services industry serves the South African population by enabling safe public

gatherings to encourage robust social, cultural, religious, commercial, and political engagement.

Restrictions on public gatherings have severely impacted the industry, enforced by the National Lockdown (Robinson, 2021). However, lockdown measures had an abrupt and destructive effect on all industry stockholders (Robinson, 2021). Events across the country (e.g. the MACUFE, the Ficksburg Cherry Jazz festival, The Cape Town International Jazz Festival, the National Arts Festival, the Metro FM Heatwave, Klein Karoo National Arts Festival, Suidoosterfees, Aardklop Arts Festival and Free State Arts Festivals) had to be cancelled in 2020 due to COVID-19 (NAC, 2020; KKNK, 2021; SABC news, 2021). The KKNK's pre-pandemic contribution alone is estimated to be R60-110 million to the national economy (Municipalities of South Africa, 2020). Sporting events (e.g., the Varsity Cup and Two Oceans marathon) and exhibitions (e.g. the Travel Indaba) were cancelled or postponed (Perrott, Hatting & Bruwer, 2020 p. 12). Religious and cultural gatherings, theatres weddings and parties had to move online, be postponed or were cancelled. Non-state-supported theatres and other events venues closed down, some for good (for example the Fugard Theatre as it operated pre-COVID-19) (The Fugard Theatre 2021). Premier venues and entertainment spaces were left in inoperative, or barely operative, due to restrictions on public gatherings during 2020 and 2021, and some closed down. Some companies in the industry had to retrench staff and also closed down due to the huge loss of income (Robinson, 2021).

An initiative titled *#LightSAred* initiated by the South African Communications Industries Association (SACIA) and the Technical Production and Services Association (TPSA) (SA government in discussions with live events industry 2020), aimed to extend financial relief to, those who earn a living in the technical production and live events industry (Light SA Red, 2020). However, the lack of reliable data about the industry's market and impact of COVID-19 is a significant challenge to resourcing and distribution of relief funds. In response, the Sun Circle Group, a media company that services the live entertainment and professional audio-visual industries in South Africa, conducted an extensive online survey of businesses in this industry. For this study, permission has been obtained from the Sun Circle Group to analyse the secondary data set. Situated within the literature on the creative economy, analysing the secondary industry data in this article offers an understanding of the market position and perceived financial implications of the COVID-19 pandemic on the Live Events, Technical and Production Services industry.

Researchers in diverse fields have recently published articles on the impact of COVID-19 on countries' economic health (e.g., Bambra *et al.*, 2020, Sahu, 2020), economy (e.g. Maital & Barzani, 2020), environment (e.g. Wang & Su, 2020) and broader society across the globe (Singh & Singh, 2020). However, regardless of the broader social and economic importance of the CCIs in terms of their economic and social footprints, and their employment contribution in South Africa, research into the impact of the COVID-19 pandemic on this sector remains

scarce. Research by the South African Cultural Observatory (SACO) demonstrates the overall negatively impact of the pandemic and lockdown measures on the CCIs. SACO (2022: p. 29; p. 31) also found that early career creatives were more negatively affected than older creatives, which impedes on the sustainability of the CCIs and the country's transformation agenda. This could arguably be the case in the LETPS industry as well. Odeku's (2021) study on the impact of COVID-19 on SMMEs in South Africa found that the impact of lockdown across various sectors not only had a devastating effect on SMMEs, but that black people involved in SSMEs were the hardest hit, as a large number of engage with or operate SMMEs in their communities. The Performing arts and Celebration domain of the CCIs includes a myriad of SMME's.

SACO (2022: p. 28) further states that women seemed to be "less negatively" impacted by lockdown than men who showed a steep decline in formal and informal employment, which may align with the comparatively fewer young women (under 35) that work in cultural occupations in relation to their male counterparts. The impact of lockdown was significant as formal and informal employment in the "cultural industries" decreased significantly between Quarters 1 and 4 of 2020 (SACO, 2022: p. 28; p. 29). This includes formal and informal jobs in the sector and in support occupations for the sector, but excludes "embedded" creatives – people employed in cultural occupations (see the CCI domains listed earlier) who work in non-cultural industries – with the brunt being carried by informal workers (SACO 2022: p. 7; p.

29). Overall, SACO's (2022:50) findings indicate that South Africa's creative economy has been negatively affected by lockdown measures to contain the spread of COVID-19 pandemic:

Production growth rates, which were already slowing in response to low overall economic growth rates, declined further. Cultural occupations declined dramatically between 2019 and 2020, as did international trade in cultural goods and most cultural services.

Although there were signs of recovery towards the end of 2020, the situation remained quite dire. According to SACO (2022: p. 12) the size of the CCI's, its contributions to other sectors and its job creation indicate that the sector needs to be nurtured for its broader ecosystem and the creative economy to flourish. Further, in terms of international goods trade, Visual Arts and Crafts, Performance and Celebration, and Books and Press are the "most significant domains" for South Africa (SACO, 2022, p. 49), which provides more the reason "to position the CCIs as a "priority sector" (as South Africa's recent Re-imagined Industrial Strategy did) (SACO, 2022, p.36).

The systematic literature review of Belitski, Kalyuzhnova, and Khlystova (2022) revealed only 59 peer-reviewed papers pertaining to the impact of the COVID-19 pandemic on the CCIs in countries across the globe. These papers indeed offered interesting insights regarding global

trends of the COVID-19 pandemic in CCIs. However only three of these were conducted in African countries (Nigeria: Apuke and Omar, 2021; sub-Saharan African countries: Ocholla, 2021; Zimbabwe: Tsekea and Chigwada, 2020), nevertheless they focused on specific creative sub-sectors (i.e., libraries and social media) and not on the LETPS in South Africa. This has implications for South Africa's transformation agenda. It is important to consider the geographical dimension of the impact of the COVID-19 pandemic, as well as the domain research focuses on, as this information could assist in the development of specific policies and recovery measures. This evidently indicates a gap that the current research may close. The objectives of the research are to i) examine the South African LETPS industry's market position and ii) COVID-19 funding implications on the industry.

This article commences with a literature review describing the LETPS industry in the context of the creative economy, as well as key stakeholders and role players. It also considers recovery measures and financial support introduced in South Africa aimed at relieving the impact of COVID-19 on this industry, followed by a description of our quantitative research strategy, methods and procedures. In conclusion, we consider the implications of the findings of the study.

The creative economy and the CCIs

The creative economy, as a concept, gained track since the 1990s (Wangen, 2017: p. 32). The discourse related to the creative economy and CCIs are marked by terminological discrepancies, categorical variations, and an unclear scope as to what constitutes creative activities and the domains to which they belong. This seems to be the case not only in South Africa, but also in the UK (Comunian & England, 2020: p. 112). For the purposes of this paper, we understand the creative economy as an evolving concept that refers to “creative assets” (CAJ, 2007: p. 9), which may be tangible or intangible and that includes “knowledge-based activities” with a “developmental dimension” linking to micro- and macro levels of the broader economy and have the potential for economic growth (CAJ, 2007: p. 9). The creative economy also includes “the contribution of those who are in creative occupations outside the creative industries as well as all those employed in the Creative Industries” (Oyekunle, 2014: p. 49).

The creative economy has been identified as a driver for increasing “business opportunities for small, medium, and micro enterprises” (SMMEs) (Oyekunle, 2014: p. 48) and as advancing social cohesion, inclusion and active citizenship (Oyekunle & Sirayi, 2018: p. 226). The CCIs considerably promote “sustainability and inclusive growth because of the diversity of its activities” (Belitski, Kalyuzhnova, and Khlystova, 2022). The Accelerated and Shared Growth Initiative of South Africa (ASGISA) recognised the creative economy as one of the driving forces of creating sustainable economic livelihoods and prospects for local communities

(Oyekunle, 2014: p. 48). The economic health of the CCIs, including LETPS, is important to broader economic development and transformation in South Africa. The CCIs are key drivers of the creative economy and resorts under the beleaguered Department of Sport, Arts and Culture. The creative industries sector constitutes a range of activities, related to the “creation, production and distribution” of services and products that utilises “creativity and intellectual capital as primary inputs”, which includes amongst others, tangible arts and creative content with “economic value and market objectives”, as well as intangible services” that can generate revenue by means of “trade and intellectual property rights” (UNCTAD, 2008: p. 4). As South Africa does not have an official definition of the CCIs (SACO, 2022: p. 8), we use Van Graan’s (2005: p. 6) definition of the creative industries:

areas of social and economic activity that are founded on – or closely allied with –

- a. Individual or collective intellectual or artistic creativity, innovation and originality and/or
- b. The conservation, teaching and celebration of cultural heritage, as well as language and which have the ability to offer work and generate income for the original creators and also for others involved in education and training, production, distribution, documentation and support for creative products or cultural experiences, whether in a not-for-profit capacity or for commercial gain.

As will be seen later, the LETPS industry aligns with these markers. To expand on Van Graan's definition, we include SACO's (2022: p. 8-9) view (based on that of UNESCO, 2009 cited in SACO, 2022 p. 8-9) that the symbolic nature of goods and services produced by the CCIs are core to its definition. SACO's definition of the CCIs aligns with Van Graan's in that the CCI's not only include "core" cultural industries and occupations, but also "commercial, for-profit, "creative" sectors" that encapsulates the domains of cultural and natural heritage, tourism, performance and celebration, books and press, visual arts and crafts, sports and recreation, design and creative services, as well as audio-visual and interactive media. We acknowledge the problematics around these categorisations; however, a discussion thereof falls outside of the scope of this article.

Accurately measuring the contributions of CCIs to the economy remains a challenge due to a lack of sufficient data and ineffective methods of data collection (Snowball, 2016), to structural limitations and the positioning of some creative activities in the informal economy (Pessoa, 2012: p. 7). In order to scope the LETPS industry in South Africa, we start by unpacking its ambit of operations.

Live events, technical and production services

For Getz (2007: p. 18), a live event is a planned or unplanned "occurrence at a given place", and "a special set of circumstances; a noteworthy occurrence" that happens by means of

creating “special places” and “other spaces” (Getz 2007: p. 180). Thus, an ‘event’ takes place outside of the normal operations or activities of the organising body and for attendees, participants or spectators, an event is a leisure opportunity or an extra-daily social or cultural experience (Bodwin, McPherson & Flynn, 2006: p. 13). Live events are “specific rituals, presentations, performances or celebrations that are consciously planned and created to mark special occasions and/or to achieve particular [personal] social, cultural or corporate goals and objectives” (Bowdin et al. 2006 cited in Bodwin, McPherson & Flynn, 2006: p. 13) designed to happen in the corporeal co-presence of others. Live events thus offer corporeal co-presence of extra-daily leisure, social or cultural experiences of infrequent occurrence in the present that are spatially and temporally delimited. Events in relation to the events industry refers to planned occurrences consisting of varied, yet related processes and functions. Whilst we acknowledge that the above interpretation of liveness has been problematised in the light of new technologies (Auslander, 2009), such a discussion falls outside of the scope of the article.

As per the above discussion, it is clear that the LETPS industry, including theatre, aligns with the markers of CCIs.

The LETPS industry, as mentioned previously, is part of the Performance and Celebration domain of the CCIs. In 2017, 7% of all jobs in South Africa was comprised of employment in the creative economy, indicating that “1.14 million jobs in South Africa were related to

activities” of the CCI’s and related industries (SACO 2020b p. 16). In 2018, the creative industries directly contributed R74.4 billion or 1.7% to the GDP (SACO, 2020a:8). To place this in perspective, the agricultural sector contributed 2.4% to the GDP in 2018 (SACO, 2020a: p. 8). The SACO mapping study of 2018 also indicated that the CCI sector grew fast in relation to the rest of the economy (SACO 2018). An early assessment by the South African Cultural Observatory (SACO) on the impact of hard lockdown on the arts and culture domains in South Africa (May 2020), estimated that the impact of the pandemic on the CCIs will reduce South Africa’s GDP in 2020 by R99,7 billion - direct and indirect impact (SACO, 2020a: p. 53). The SACO (2020a: p. 49) further estimated that the impact (excluding the induced impact) on the total output of the Performance and Celebration domain will have been R6.4 billion, with a drop in GDP of R2,8 billion and a drop in intermediary imports of R583 million . SACO (2022: p. 13) places the total Gross Value Added of the CCIs at R161 billion in 2020, representing almost 3% of the overall economic production of the country. The Performance and Celebrations domain comprised 6% of the CCIs contribution to the 2020 GDP (SACO, 2022: p. 13). The SACO reports from which these numbers were drawn, disaggregated the CCI production from the rest of the economic sectors (SACO, 2020b: p. 12; SACO, 2022). Sub-domains such as LETPS have cross-domain and cross-sector applicability, and its exact scale is not documented. The collective activities of the LETPS industry provide permanent employment and, on a larger scale, freelance work opportunities for a wide range of professional practitioners across the country (Robinson, 2021). Despite small growth points

indicated by the SACO (2022), the lost output in the economic activities of the CCIs due to lockdown, and by extension the LETPS industry, should be a cause for concern and an actant for creating a national strategy to build the resilience of the CCIs – particularly the most vulnerable domains, such as Performance and Celebration.

Role players in the Live Events, Technical and Production Services industry

Key stakeholders play important roles in the CCIs by forming the sector's strategies and policies, supporting the community, and controlling the quality of goods and services (Belitski, Kalyuzhnova & Khlystova, 2022). The LETPS industry in South Africa comprises of “sporting, entertainment, recreational, religious, cultural, meetings, conferences, exhibitions, incentives, film, television and audio-visual production, organisational or any other similar activities hosted at a stadium, a venue, a studio or audio-visual production facility, or within a prescribed area (including the virtual on-line space)” (Draft Event Technical and Production Services Industry B-BBEE SECTOR CODE, 2021). As such, it covers a broad range of activities in diverse contexts, including amongst others, conferences, festivals, fairs, concerts, exhibitions, activations, promotions, music performances, dance and theatre performances, product launches, festivals, sports gatherings, parties and weddings, concerts, fundraisers, as well as “business events/business tourism”, community – and cultural events”, as well as the education sector (Bodwin, McPherson & Flynn, 2006: p. i, ii). The events industry thus also has many role-players and stakeholders, including the host organisation and community, clients, media,

participants, industry professionals, spectators, funders, associations and federations and the educational sector (teachers, academics and students). Live events can be tied to a number of supply and support services, including project planners, events management and catering companies, production companies, wedding and party planners, , multi-media and technical production companies, as well as “exhibition and theatrical contractors” (Bodwin, McPherson & Flynn, 2006: p. 39-40), florists, rental companies, providers of temporary structures (Bodwin, McPherson & Flynn, 2006: p. ii;14), performers, stage and production management to front of house and technical services (for example equipment and operators for lighting and sound, décor, set and costume design and provision, videography), photography, transport and digital content creation. .

People working in the LETPS industry may also not be officially categorised as such. Some businesses offer events-related services, but categorise themselves in a different way. For example, we view the key of performing arts receiving houses’ operations as events management, but the operations and occupations are classified under the performing arts. Occupations related to the LETPS industry include, for example, stage managers, production managers, venue managers, artists and entertainers, public relations and marketing officers or consultants, cleaner companies, caterers, ticket providers, box office officers, security guards (Bodwin, McPherson & Flynn, 2006: p. 41-42).

Besides the problematics that labelling companies and jobs present, from our literature review, it seems that LETPS are often dealt with as part of other sectors and industries. For example, with leisure, or events- and sports tourism (see for example Nhamo, Dube, & Chikodzi, 2020; Perrott, Hattingh & Bruwer, 2020; Mohanty, Dhoundiyal, & Choudhury, 2020; Swart & Maralack, 2020; Perold, Hattingh, Bama, Bergh & Bruwer, 2020; Mejabi, Ndlovu & Cele, 2018). This makes it challenging to gain an accurate view of the size of the South African LETPS industry, employment numbers and status of the industry, or to map income, training or qualifications of those working in the industry. Such complexities saw to it that SMMEs and individuals in the LETPS industry found themselves in an invidious position when The South Africa Government announced its COVID-19 relief and recovery measures.

Recovery measures and financial support aimed at relieving the impact of COVID-19

Countries across the globe introduced several governmental and private support measures (e.g., financial support for cultural organisations, self-employment income support schemes, job retention schemes by sponsoring salaries, one-off grants and funding) aimed at minimising the long-term socio-economic impacts of the COVID-19 pandemic (Belitski, Kalyuzhnova & Khlystova, 2022). Governments around the globe have implemented considerable relief programmes for the business in CCIs (e.g. Betzler et al., 2020, Eikhof, 2020; Joffe, 2020). However, systematically assessment of these support measures resulted in several criticisms regarding public policies such as limited support from government support, a “narrow focus”

of “support packages” and once-off support (Betzler et al., 2020, Joffe, 2020). Belitski, Kalyuzhnova and Khlystova’s (2022) analysis of European governments’ response to the COVID-19, found that in general they developed four types of measures (e.i. subsidies and direct funding; loans and credits, default compensation, laws and regulations) particularly for the cultural and creative sectors. Eikhof (2020) argued that mere short term financial relief offered to the cultural economy in the UK should shift towards longer term responses aimed at inclusion and workforce diversity. Deficiency in the recovery measures identified included unsuitability for the fragmented industry relying significantly on freelancers and temporary staff frequently being disqualified to apply for the support packages (Florida & Seman, 2020). Evidence furthermore suggests that a large share of workers in this industry is either ineligible for support or struggled to identify relevant support (Eikhof, 2020).

Some international scholars compared the response of governments of different countries to the global COVID-19 pandemic. Betzler et al. (2020) for example, analysed the content of COVID-19 state policies for the arts and cultural sector across countries across Europe. This analysis identified specific contextual factors influencing countries to invest more in assisting their CCIs namely i) higher wealth (GDP per capita); ii) lower debt rates; iii) higher shares of general government expenditure on cultural services; and iv) lower corruption in countries’ public sector. It was furthermore revealed that aid packaged across these countries were mostly aimed at preventing large companies based in urban centres from capsizing, with far less

attention paid to the need of small organisations, independent groups and self-employed workers. In Joffe's (2020) opinion piece about the African cultural economy he mentioned the scepticism about government funds due to the long history of corruption and the lack of governments prioritising of cultural and creative sectors. In the light of this negative perspective, measures to be taken on the African content is likely to be far less drastic than these developing European countries.

The South African Government also implemented various interim measures to mitigate the effects of the COVID-19 pandemic on individuals and businesses, to which the LETPS industry could apply for. Two central pillars of relief funding became available. The first pillar is government funding and the second, funding from the private sector. We discuss the available funding the LETPS industry could – theoretically - access. The application and success in receiving these funding types have been assessed in the empirical this paper to determine the COVID-19 funding implications on the industry.

Government support

The South African Government introduced amongst others, a COVID-19 Temporary Employee/Employer Relief Scheme (TERS), a SMME Debt relief strategy and a Draft Disaster Management Tax Relief Bill. The aforementioned was enacted by the Minister of Employment and Labour who announced the establishment of the C19 TERS benefit from the

Unemployment Insurance Fund (UIF) in addressing the impact of the National Lockdown on UIF contributors. The UIF gives short-term relief to persons who became unemployed or who are unable to work because of illness, pregnancy, etc. as well as to dependents of a deceased person who contributed to the UIF whilst employed. The C19 TERS benefit is not linked to other benefits from the UIF. Employers who were unable to pay the full salaries of their workers due to the National Lockdown were encouraged to apply for the COVID-19 TERS Benefit (South African Government, 2020d). All businesses with employees that are registered with, and contributes to, the UIF could apply for C19-TERS, from the formal sector to the informal economy including spaza shops, shebeens and hair salons (Unemployment Insurance Fund (UIF) and COVID-19, 2020). Also included were “venues for professional sports, auctions, cinemas, museums, theatres, social events and live performances (Annexure A of the Directive) as well as restaurants, the liquor industry, hospitality, tourism and the businesses that form part of those value chains” (GroundUp, 2020). TERS benefits was extended from the initial period (compensating for COVID-19 related illness, loss of income or employment under Level 5 hard lockdown) to include two more application phases, namely between 16 October-31 December 2020 from 1 January until 15 March 2021, with the latter involving payments made directly to employees’ bank accounts rather than to the employers’ bank accounts (GroundUp, 2020).

The UIF also provided assistance for businesses that had to shut down for on the short term or implement reduced work time through the Short Term Unemployment Insurance (UIF) Benefits, as well as COVID-19 death and illness relief (Unemployment Insurance Fund (UIF) and COVID-19 2020). Businesses in the LETPS industry could also apply for this funding. Other measures include the amended Employment Tax Incentive Scheme that offered tax subsidies and postponed payment of 20% of PAYE tax as a short-term measure for qualifying companies and individuals (South African Government Treasury, 2020).

The *Economic relief measures: small business interventions* (2020c) document of the South African Government indicates several measures to help SMMEs, inclusive of LETPS. The Debt Relief Finance Scheme was a “soft-loan facility aimed” to help SMME’s stay afloat for 6 months during the COVID-19 pandemic, starting April 2020 (2020c:3). Further measures include: a payment moratorium was given to qualifying Small Enterprise Finance Agency-funded SMME’s for a period up to 6 months; a loan guarantee scheme guaranteed by government for qualifying businesses with a turnover of less than R300 million per year in order to meet some of their operational expenditures; the SASSA grant of R350 per month for unemployed persons over 18 years who do not benefit from other government support. This grant was not in line with the cost of living (Spaull, Casale & Posel 2020). Tax relief for tax compliant businesses included a tax subsidy for private sector employees in a specific lower income bracket for four months via the employer; and businesses with a turnover of R50

million or less per year could “delay 20% of their employees’ tax liabilities” over a four-month period, as well as a percentage of their “provisional corporate income tax payments” without interest or penalties for six months (South African Government 2020c: p. 16). The National Lotteries Commission (NLC) made R150 million available for Covid-19 relief funding to NGO’s, NPO’s and NPC’s within specific parameters pertaining to having been funded by the NLC in the past two years prior to the pandemic, but excluding those who were awarded grants in 2020.

The Department of Sport, Arts and Culture (DSAC) announced support amounting to 150 million Rands (US\$ 3.8 million) on 25 March 2020 for artists, athletes, fitness practitioners and technical staff and “the core ecosystem” supporting them (UNESCO, 2020b) for cancelled events, digital migration and other projects. Funding eligibility includes DSAC-funded projects that were cancelled could be compensated for the expenditure incurred at a possible flat rate, DSAC-funded institutions whose productions were cancelled between March-June 2020 could compensate artists and practitioners that were already booked. Cancelled non-DSAC-funded projects could apply for relief if they have “a national footprint” (South African Government News Agency, 2020). Applications by 25 productions and 15 live events that were already submitted by national industry organisations will be compensated (South African Government News Agency, 2020). In facilitating the second call for applications in 2020, the Department of Sport, Arts and Culture partnered with Business and Arts South Africa (BASA) and the

National Arts Council (NAC) to use their application platforms as another avenue to submit applications for relief (South African Government, 2020a). The third round, at the time of writing, was still in process.

The private sector

The private sector also put some strategies in place to assist individuals and businesses during the National Lockdown that businesses in the LETPS could apply for. The examples discussed are not exhaustive, but serve to illustrate a broad picture of the available support. For example, banks provided customers “in good standing” with a three-month payment holiday, “restructured facilities for corporate and investment banking clients” and offered R16.08 billion in loans to small businesses under the government guaranteed COVID-19 Loan Guarantee Scheme (The Banking Association of South Africa, 2020). Insurance companies gave clients payment holidays, for example, Sanlam offered qualifying clients payment holidays for premiums for three months (Marx, 2020). Many companies offered various forms of support to SMMEs and corporate companies, for example Sanlam committed R2.25 billion to the Investors’ Legacy range that have the central objective of protecting, preserving, and creating jobs (Sanlam, 2020). This was the case for several similar enterprises (see for example Santam’s Contingent Business Interruption strategy (Sanlam, 2021). Sanlam (2020) It has a general industry focus, but with a specific emphasis on SSME’s in sectors that have been most impacted. The South African Venture Capital and Private Equity Association

(SAVCA) offered marketing, legal and finance services, and helped SMMEs to understand how to access grants and bridging funding (VANSA, 2021).

The South African Future Trust (2020), established with a 1 billion Rand contribution from the Oppenheimer Generations Foundation, gave interest free loans to small businesses to continue to pay selected employees R750 a week for 15 weeks. The Oppenheimer Generations Foundation, albeit interest free, was a loan. The Rupert family and Remgro Limited created the Sukuma Relief Programme that offers financial aid to SMMEs that have “formal sole proprietors” and are “close corporations, companies, and trusts” to the value of 1 billion Rands.

Specific to the arts, Business and Arts South Africa (BASA) set up The Artist Relief Grant of to support artists and cultural workers suffering a loss of income due to the cancellations of confirmed events, as a result of the nationwide lockdown to the value of about R1,3-million up to February 2021 (BASA, 2021). BASA raised the funds from individuals, businesses and academic institutions, and redirected funds from other areas operations to facilitate this. M-Net and MultiChoice made 80 million Rands available to pay salaries to cast and crew during the March-April 2020 (MultiChoice, 2020). Initiatives such as the Concerts SA Digital Mobility Fund, the Sustaining Theatre and Dance Foundation and the Theatre and Dance Alliance attempted to mitigate the situation and lobby the government for better, and better managed, financial support to performing artists. Companies and individuals across the live events

spectrum launched South African Fund 4 Entertainment (SAFE) to offer “hourly workers” technical and production crew, security personnel, cleaners, waiters, bar persons etc. working in live events with food vouchers (Between10and5, 2020; SAFE, n.d.). The Tshwane-based Poetry Relief Fund raised funds to support freelance poets who lost income due to cancelled events by offering an honorarium for online engagement (The Poetry Relief Fund, 2020). The poetry Relief Fund offered R1000 per poet to 16 poets. The National Lotteries Commission (2020) made R150 million worth of relief funds available that were marred by allegations of corruption (Felix 2020). The Tribuo Artists Disaster Relief Fund used crowdfunding to support artists and individuals in “associated industries” who lost their source of income (Backabuddy, 2021) during- and post-hard lockdown. The Theatre Benevolent Fund supported performing artists with food vouchers (Theatre Benevolent Fund, 2020).

Although limited private funding was also available from international organisations to South African artists and technical workers, the Sun Circle Group’s research centered on funding that was made available from within South Africa. There remains a lack of empirical studies assessing the success of recovery measures and financial support aimed at relieving the impact of lockdown on the CCIs in South Africa (Joffe, 2020). This will therefore be addressed in this study.

Research design and sample

The research design serves as an overview plan of the methods to be used to collect and analyse data (Zikmund *et al.*, 2021). For this article secondary data analysis (SDA) which refers to the process of analyzing data collected from other researcher who primarily collected this data for another purpose was applied (Donnellan & Lucas, 2013). The original primary data were collected online from freelancers as well employers for the South African LETPS industry by the Sun Circle group to compile an industry profile and identify corrective actions during COVID 19. In this research study, secondary data of business owners who completed an online survey was analysed to determine the market position and perceived financial implications due to COVID 19 of the industry. The perspectives of freelancers and short-term contract staff were thus not considered in this article.

In practice, it is seldom possible to study all the members of a population that is under consideration. The availability of population elements at a single time, as well as budget and time constraints, requires the use of a sample – in order to study a sample of the population (Zikmund *et al.*, 2021). This convenience approach was used for the sampling design of the proposed study.

The population of a study consists of any complete group of entities that share the same common set of characteristics (Hair *et al.*, 2014). The target population, relevant to this study,

was business owners older than 18 years who are involved in the South African events, technical and production services industry. The total sample size was 535 business owners who responded to the online survey.

Data collection and measurement instrument

As an independent company, the Sun Circle Group, a media company that services the Live Entertainment and Professional AV industries in South Africa, implemented the online survey of the industry to ascertain the financial impact of lockdown measures on the LETPS industry and to the efficacy of relief measures available to those in the LETPS industry. A survey strategy was used to guide the data collection process. The respondents were invited to complete an online structured questionnaire. The first section (Section A) gathered their information about the market position and the second section (Section B) measured perceived financial implications due to COVID 19. This online means of data collection is well suited for collecting data that can be quantified and used to describe industry's market position and perceived impact due to COVID 19.

Questionnaires were distributed via social media and respondents invited to complete it via an online survey platform. A personalised introduction explaining the purpose of the research: that participation is voluntary, ensuring confidentiality and related issues, accompanied the

questionnaire. The respondents were requested to complete the questions as released on the online application.

Validity refers to the accuracy of a measure or the extent to which a score truthfully signifies a concept (Hair *et al.*, 2014). A direct measurement of content validity was obtained by the Sun Circle Group, to compile and validate the validity of the questions in the measuring instrument as it appeared to them.

Key ethical issues pertaining to this study were considered and adhered to. This study utilised secondary data but access to personal and contact details regarding the original survey respondents was not supplied to the researchers of the current study. This eliminated compromising an individual's confidentiality. Approval was granted by Sun Circle Group, to use the secondary data for further analysis and publishing purposes.

Results and discussions

Industry profile

The view obtained in this project represents businesses in the LETPS industry across South Africa (Table 1). The largest part of businesses that were represented in the sample operated in Gauteng province (n=303; 56.6%) (Figure 1a). This is followed by those with operations

located in Western Cape (n=105; 19.6%) and KwaZulu Natal (n=60, 11.2%). The remaining businesses were located in the other six provinces (n=67, 12.6%). This portfolio of concentration in the typical economically active provinces of South Africa with lesser operation in other areas reflects the geographical nature of events being arranged in these areas by the LETPS.

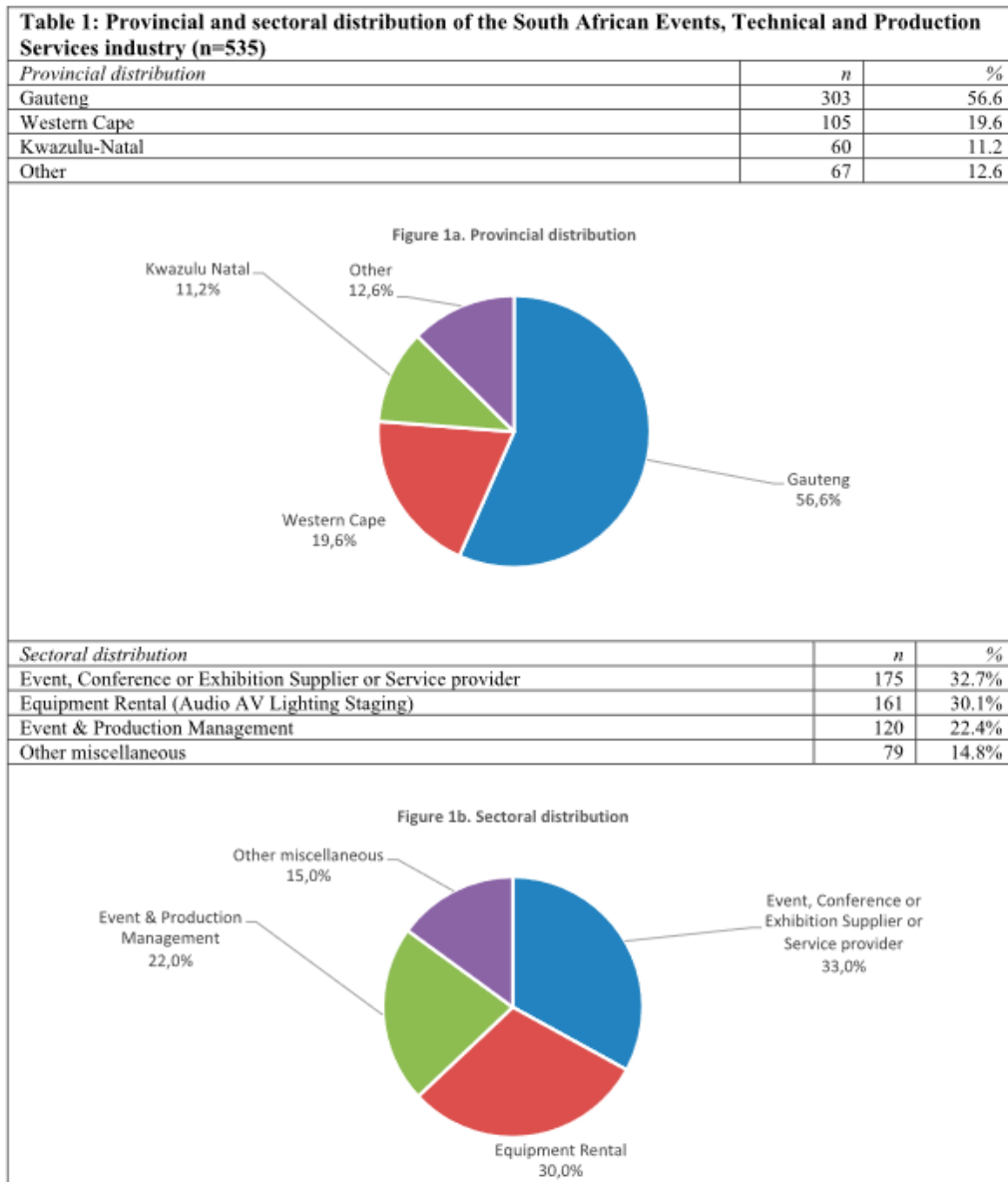


Figure 1. (a) provincial distribution (b) sectoral distribution.

In term of sectoral distribution, approximately one third of the businesses provides services in the form of Events, conferences / exhibition suppliers / service providers (n=175, 32.7%) and Equipment Rental (e.g. Audio AV Lighting Staging) (n=161, 30.1%)(Figure 1b). Almost a quarter (n=120, 22.4%) is involved in Event and Production Management. The other provide a wide variety of miscellaneous services (n=79, 14.8%) such as concerts or events promoters, venue suppliers and equipment sales.

The LETPS industry's market position

This industry's market position has been examined in terms of their annual turnover, wage bills and employment figures. A total annual turnover of R12 540 419 378 for all businesses during the last financial year is reported (Table 2). When considering the average annual turnover of R23 440 036 and the median (R3 000 000) per business it implies skewed distribution where 75% of the sample earns considerably less than the average. Considering these reported turnover figures, it can be inferred that the industry maintained a strong market position and contributed significantly to the economy of South Africa before COVID-19.

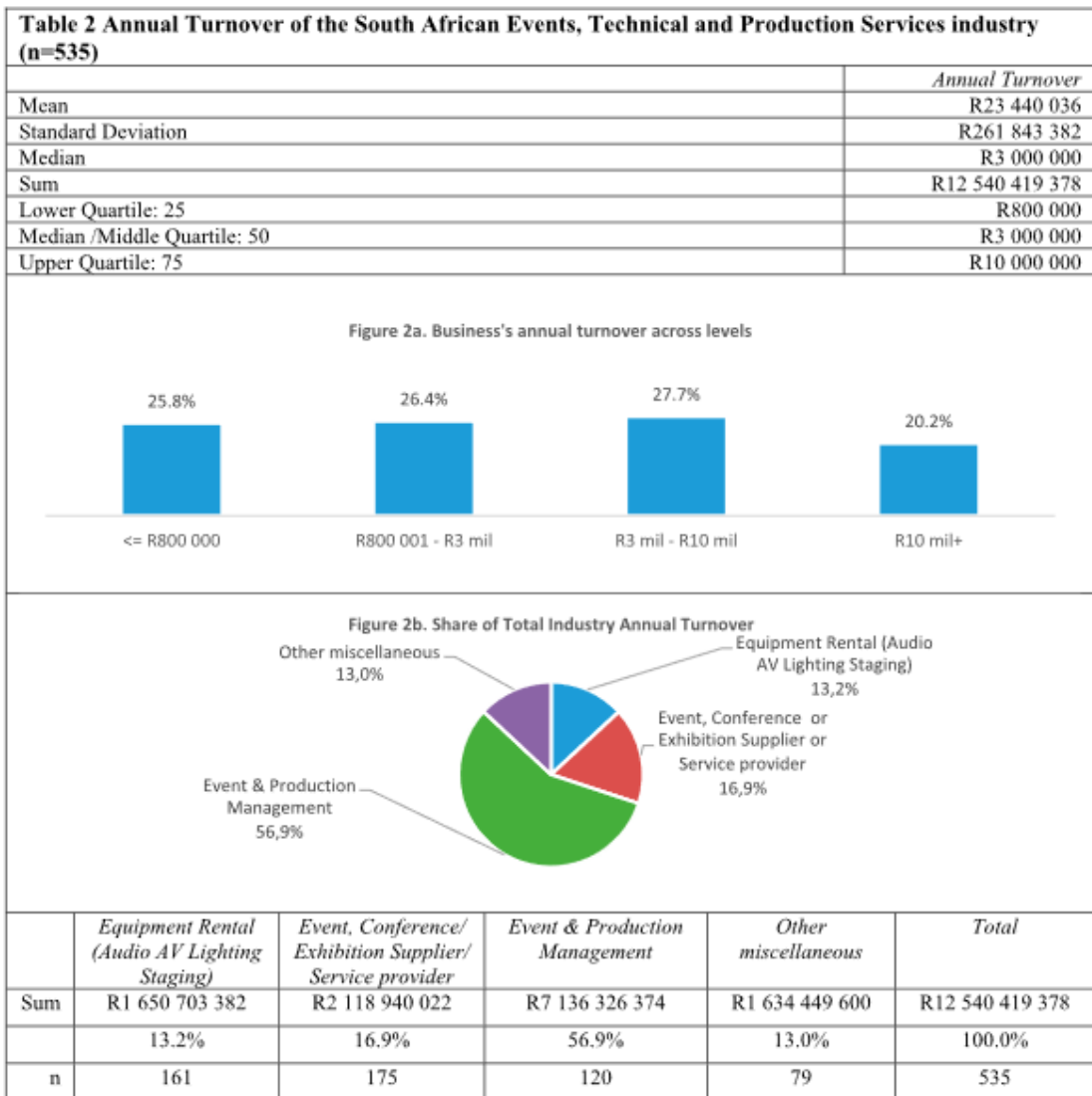


Figure 2. (a) Business's annual turnover across levels. (b) Share of total industry annual turnover.

When examining the annual turnover categories (Figure 2a) it is apparent that a relative share of 20.2% (n=108) of businesses obtained an annual turnover of R10 million (and more). However once again the median of R3 000 000 indicates an unequal level of turnover between the different organisations. Those earning between the R3 million to R10 million per annum represented 27.7% (n=148) and those R800 001 to R3 million represented 26,4% (n=141) of the establishments. There was 25,8% (n=138) in the bottom group with an annual turnover of

less than R800 000. This widespread range of revenue level is due the involvement from small one-person operations to large companies involved in prominent exclusive events across South Africa.

When comparing the major sectors within this industry (Figure 2b), it is evident that the Events and Production Management sector produced the vast majority of the income (56.9%, R7 136) relative to the total annual turnover (R12 540 419 378). This noteworthy revenue is derived from those supplying event management services incorporating creative and technical production to deliver memorable event experiences to a wide range of corporate clients in the CCIs. With present brand and consumer trends accentuation the importance of experience (Schmitt, Brakus & Zarantonello, 2015) more and more brands are utilising professional event and production management companies (Robinson 2021). The other sectors obtained a significant lower annual income with the Event, Conference/ Exhibition Supplier / Service providers producing 16.9% (n=175) of revenue, followed by the Equipment Rental sector (13.2%, n=161) and other miscellaneous services (13.0%, n=79).

Table 3: Total Annual Wage Bill & Staff employed of the South African Events, Technical and Production Services industry (n=535)										
<i>Total Annual Wage Bill</i>										
	<i>Total Annual Wage Bill for Full Time Employees</i>			<i>Total Annual wage bill for Freelance or Temporary Staff</i>			<i>Total Annual wage bill for all staff types</i>			
Mean	R 2 247 895			R972 689			R 23 440 036			
Standard Deviation							R 261 843 382			
Lower Quartile: 25	R180 000			R50 000						
Median /Middle Quartile: 50	R500 000			R180 000			R 3 000 000			
Upper Quartile: 75	R1 800 000			R500 000						
Sum	R1 202 623 706			R520 388 586			R 1 723 012 292			
<i>Staff employed</i>										
	<i>Number of Full time Employees</i>			<i>Number of Part time Employees</i>			<i>Total number of Staff</i>			
Mean	12.0			55.3			67.3			
Standard Deviation	30,27			164,45			172,17			
Lower Quartile: 25	2.0			5.0			10.0			
Median /Middle Quartile: 50	5.0			13.0			22.0			
Upper Quartile: 75	10.0			35.0			52.0			
Minimum	0			0			0			
Maximum	495			2 000			2 007			
<i>Share of total industry staff employment type per sector</i>										
	<i>Equipment Rental</i>		<i>Event, Conference/ Exhibition Supplier / Service provider</i>		<i>Event & Production Management</i>		<i>Other miscellaneous</i>		<i>Total</i>	
	<i>Sum</i>	<i>%</i>	<i>Sum</i>	<i>%</i>	<i>Sum</i>	<i>%</i>	<i>Sum</i>	<i>%</i>	<i>Sum</i>	<i>%</i>
Full time	1 838	29%	2 589	40%	927	14%	1 076	17%	6 430	100%
Freelances or Temp	5 236	18%	11 473	39%	6 149	21%	6 729	23%	29 587	100%
Total staff	7 074	20%	14 062	39%	7 076	20%	7 805	22%	36 017	100%

Figure 3.1 Share of total industry staff employment type per sector

Employment Type	Equipment Rental (%)	Event, Conference/ Exhibition Supplier / Service provider (%)	Event & Production Management (%)	Other miscellaneous (%)
Full time	29%	40%	14%	17%
Freelances or Temp	18%	39%	21%	23%
Total staff	20%	39%	20%	22%

Figure 3. Share of total industry staff employment type per sector.

Further crucial aspects examined to access the market position of the industry included the annual wage bills and employment figures (Table 3). A total spend of R1 723 012 292 (R1.7 billion Rand) on salaries and wages was reported. The total annual wage bill for full time

employees of the organisations represented R1 202 623 706 while median for full time employees per organisation was R500 000 (table 3). The top quartile (25%) of these companies spent at least R1 800 000 (, while the bottom quartile spends R180 000 or less on their annual wage. The total annual freelance and temporary staff wage bill of the organisations represented R520 388 586. The average annual freelance /temporary staff wage bill per organisation was close to one million rand (R972 689). The relatively large share of freelance /temporary staff costs confirm the large-scale freelance work opportunities offered for wide range of professional practitioners across the country.

The businesses offered annual employment to an estimated 6 430 full time employees and 29 587 part time workers with an overall average of 12 full time staff members and 55 part time workers per organisation (see Table 3). This implies significant work opportunities offered. These businesses contribute significantly in terms of full and part time employment opportunities (37 000) on an annual basis. It should also be taken into account that some of the organisations did not employ any full-time employees while other did not employ part time employees as indicated by the minimum values of 0.

One quarter employed five or more full-time staff members in their company. With 25% of these businesses employing more than 10 people full time. The businesses furthermore offered employment to an overall average of 55 part time employment opportunities per company.

When comparing the staff employment type within each sector industry (Figure 3.1), it is apparent that the Event, Conference/Exhibition Supplier/Service provider employed the largest portion of people in terms of full-time employment (40%; 2 589) as well as freelancers or temporary staff (39%, 11 473).

COVID-19 Recovery measures and funding

The financial implications of COVID-19 funding on the South African LETPS industry have been examined in terms of funding application and success rates. For this analysis TERS funding and business relief funding from government departments, private institutions and banks accessible to this industry between the COVID-19 alert levels 5 (hard lockdown), 4, and 3 over a period of 8 months were considered.

A share of 59,6% (n=319) of the companies were optimistic and applied for TERS funding, Alarmingly, a share of 40% (n=216) did not apply at all (Table 4). When evaluating application rates in terms of annual income it is noteworthy that those with higher revenues are associated with higher TERS submission propensity (Figure 4a). The vast majority of businesses (n=91; 84,3%) in the highest revenue groups (R10 mil) applied for the funding. In the second place was those earning R3 mil-R10 mil, where 77,0% submit applications followed by those earning R800 001-R3mil where 58,9% (83) applied. However, for those smaller operations earning less than R800 001 less than one third (31; 22,5%) applied.



Figure 4. (a) Application for TERS funding per annual turnover levels. (b) Receiving of TERS funding per annual turnover levels.

Of all businesses examined 16% (87), did not obtain TERS funding for all their permanent staff. Only 27% (143) received funding for all permanent staff, and unfortunately 17% (89)

was not successful despite submitting applications. When analysing TERS funding received, once again high-income businesses were associated with more success in terms of obtaining funds (Figure 4b). The majority of businesses (54%, 58) in the highest revenue groups (R10 mil+) (663,198 USD+) received funding for all permanent staff.

This was followed by those with an income of R3 mil-R10 mil where 35% (52) of them obtained funding and those earning R800 001-R3mil where only 18% (26) was successful. Regrettably for those with the lowest level of annual turnover (less than R800 000) a mere 5% (7) obtained funding for all permanent staff.

Overall, only (10,1%, n=54) of the establishments assessed received relief funding during the COVID-19 from government departments / private institutions, the vast majority (89,9%, 216) did not. This pattern of limited funding received was noticeable for all the annual turnover levels, with businesses making the least turnover (less than R800 000;), recording a mere 6,5% (9) (Figure 5a).

Limited relief funding during COVID-19 was also obtained from banks (16,6%; 89). Similar to TERS funding received, once again high-income businesses were associated with more success in terms of obtaining relief funding from banks (Figure 5b). Just 6,5% (9) of operations earning less than R800 001 obtained relief funding from banks, while those in the three highest revenues groups (R800 001-R3mil/; R3 mil-R10 mil; R10 mil) was almost three times more

successful in terms of relative application share (17,0%; 19,6%; 25,0%). The funding set aside by government to the banking institutions did not readily reach these companies. Banks seemed to be following the normal loan process and most companies did not comply and were not given funding to keep their businesses afloat and pay staff salaries.

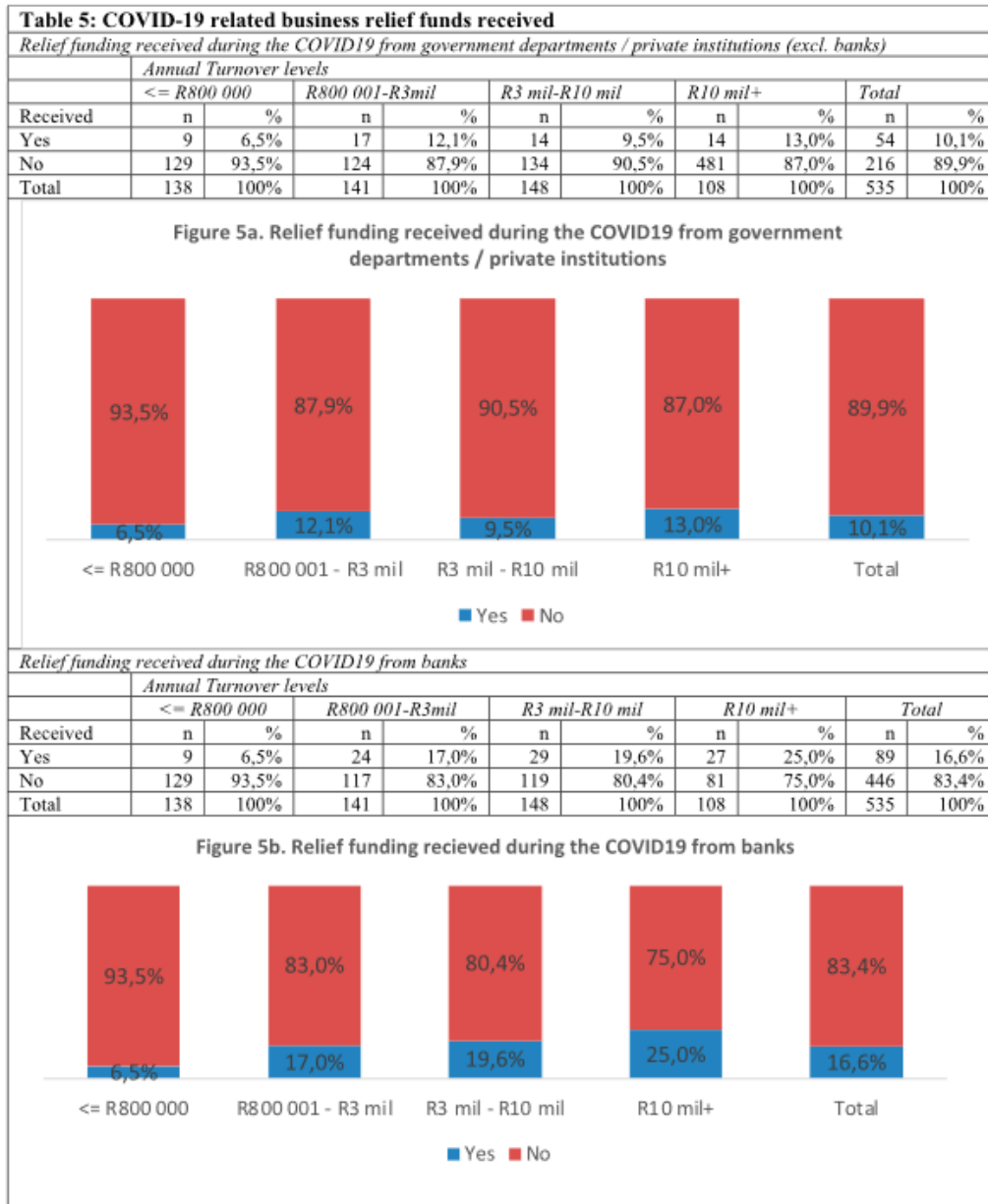


Figure 5. (a) Relief funding received during the COVID19 from government departments /private institutions.

(b) Relief funding received during the COVID19 from banks.

Discussion on the industry's market positionThe provincial and sectoral distribution of respondents from the LETPS survey shows that Gauteng was well represented, followed by the Western Cape. Considering the reported turnover figures, it can be inferred that the industry maintained a strong market position and contributed significantly to the economy of South Africa before the hard lockdown. This resonates with SACO's (2020b) findings on the contribution of the CCIs to South Africa's GDP. The events sector of the LETPS was reportedly the largest income generator and employment creator.

The employment figures indicate that the LETPS makes extensive use of freelance contractors, who were left particularly vulnerable during hard lockdown as the criteria for eligibility for a number of relief options excluded them. Similar frustrations have been experienced globally as evidenced by part time workers struggling to qualify for or identify relevant support (Eikhof, 2020), thus suggesting that the critiquing regarding the unsuitability for the fragmented industry relying significantly on freelancers and temporary staff frequently being disqualified to apply for the support packages (Florida & Seman, 2020) also to be valid concern in the South African context.

COVID-19 Recovery measures and funding

It was evident COVID-19 funding application rates, and subsequent success rates for funding were linked to annual income. In other words, larger high-income businesses were associated with higher levels of application for funding as well as success in terms of obtaining funding leaving the small players at the margin. This is in line with the trend in European countries where aid packages also focused predominantly on large companies capsizing with far less attention paid to the need of small organisations and independent groups (Betzler *et al.*, 2020).

Those with higher revenues were more likely to apply and receive C19 TERS funding compared to smaller operations with low annual turnover. This may partly be due to the qualifiers for the C19 TERS and the Short Term Unemployment Insurance (UIF) benefits presenting several challenges for those working in LETPS, as many were freelancer employees who were not covered by C19 TERS or short term unemployment insurance from the UIF. C19 TERS eligibility criteria, for example, states that “[y]ou are only entitled to C19 TERS benefits for the periods in which you suffered an income loss” (Department of Labour, n.d.:7) and employees needed to submit confirmation of employment as part of the criteria for eligibility (Department of Labour, n.d.:2). The employment insurance and financial assistance from the formal sector for CCI industries workers in South Africa is problematic at the best of times, due to the nature of employment in the sector. Many CCI workers are excluded from benefits

associated with permanent jobs, such as unemployment insurance or paid leave portfolio (SACO 2020b: p. 14).

The DSAC received five thousand applications by the deadline for the Artists Relief Fund, with only 105 applications approved by May 2020. This was reportedly due to applications not being correctly or fully completed, or not meeting the requirements for funding as they could not provide proof of cancelled events (SACO, 2020a: p. 14). Those working on events that were not cancelled, but indefinitely postponed, were not eligible for the first round of funding (SACO, 2020a). Three companies received a tender for short term funding from DSAC to assist with recording and streaming of events from DSAC-funded venues amounting to over 3 million Rands (SACO, 2020b:14). Van Graan (2021) states that “the criteria for accessing initial relief funding, the identification of beneficiaries and the mechanism through which the relief fund was to be managed were finalised in consultation with Sascoc (for sport) and the Cultural and Creative Industries Federation of South Africa (CCIFSA) (for arts and culture)”. However, the CCIFSA — a creation is an initiative by minister Mthethwa that has “no track record, no significant membership and no credibility within the creative sector” (Van Graan, 2021). It was reported on 26 March 2021 that R300 million meant for the COVID-19 artist relief fund has “disappeared”, with Minister Mthethwa stating that National Arts Council (NAC) is “taking action against those within the organisation who are implicated in the misuse of funds” (Sekudu, 2021).

For many artists and companies, the money they received was simply insufficient. For example, VR Theatrical, a theatre production company, had been given R20 000 in April 2020 by the DSAC. VR Theatrical scheduled 12 productions for 2020, of which all had to be cancelled due to the national lockdown. As a company employing around 150 “independent contractors” per annum (National Council of Provinces Committee Education and Technology, Sports, Arts and Culture, 2020), the funds brought little relief. Arts festivals received no support from the Artist Relief Fund (National Council of Provinces Committee Education and Technology, Sports, Arts and Culture, 2020).

The way funding applications were managed further irked artists. For example, Ismail Mahomed alleged that during lockdown level four, DSAC government officials worked from home, yet the DSAC refused to accept electronic copies and insisted on beneficiaries delivering physically signed contracts being delivered to the DSAC offices (National Council of Provinces Committee Education and Technology, Sports, Arts and Culture 2020). This implies amongst others printing and travelling costs, as well as possible fault-lines in application tracking processes. The poor communication from DSAC, as well as the management and disbursement of the Artist Relief Fund led to nationwide calls and protests from creatives to remove the Minister of Arts and Culture, Nathi Mtshwa, from office - *#NathiMustGo*. DSAC and the NAC have denied mismanagement of the funds (Malofo 2021). The second phase of artists’ relief funding (September to November 2020) offered a set rate of R2,200 per month –

amounting to R6,600 paid as a once-off payment per beneficiary. Those who received funding during the first phase (up to R20,000 each), did not qualify for relief funding in the second phase (Van Graan 2021). Minister Mthethwa's boasted that R642.9-million (3, 076) from the DSAC has made available since hard lockdown to 63,343 beneficiaries in the "creative and sport industry" by the end of September 2021 (Van Graan, 2021). While this may be the case, the problems indicated by the dataset (see tables) implies that the funds either did not reach the applicant, or that applicants were excluded from the parameters of the funding during the period under review

A further stumbling block was that the criteria for government and many private sector funding did not consider the large informal economy of the sector. The seemingly ineffectualness related to government's deployment of and boasted about the amounts disbursed DSCA's relief funding (SACO 2020b:14) exacerbated an already precarious situation. The criteria for eligibility did not align well with the nature of employment in the arts, including the LETPS industry. For businesses and individuals that were not registered with CIPC, or for individuals who worked on short-term contracts or as independent contractors, having had to provide evidence of tax records or existing employment contracts in effect disqualified them from applying for funding. These factors are indicative of DSAC's lack of understanding of how the industries operate.

Limited relief funding was obtained from banks, with businesses in the higher revenue bracket having more success in obtaining relief funding from banks. The funding set aside by government to banking institutions did not readily reach those the funding was intended for. Banks seemed to be following the normal loan process that requires amongst other proof of employment for longer than three consecutive months and many companies did not comply and were not given financial support, or sufficient financial support, to keep their businesses afloat and pay staff salaries. Many in the LETPS industry, due to short-term contracts and the project-based nature of their work, do not qualify for bank loans to start with.

In terms of the private sector, funding was available, but limited. For example, BASA could only support 159 individual artists with grants. BASA also offered grants for 67 artists diagnosed with, or hospitalised because of, COVID-19 towards medical assistance (BASA, 2021). The Theatre Benevolent Fund, for example, suspended the disbursement of food vouchers on 17 May 2020 as the overwhelming need saw its funds rapidly depleted (Theatre Benevolent Fund, 2020). The Poetry Relief Fund could only assist 16 artists with R1000 each (The Poetry Relief Fund, 2020). Thus, government funding is the largest contributor to relief funding, but does not take the nature of employment and work in the Performing Arts and Celebration domain, including the LETPS, into account. This left many in the LETPS industry without support.

Conclusion and recommendations

Beforehand lockdown, the market position of the LETPS was strong. SACO (2020a:8) found that the Performance and Celebration domain, within which the LETPS industry is positioned, was the most economically vulnerable domain during the national lockdown, due to its largely face-to-face modes of interaction. The current research confirm that that industry maintained a strong market position and contributed significantly to the economy of South Africa before COVID-19.

Although the industry also mobilised internally to support itself, funds that could be raised and disbursed or food vouchers that could be allocated were not sufficient to address the overwhelming need. The main funder was government . The majority of businesses surveyed, across annual turnover levels, reportedly did not receive relief funding from government departments or private institutions. While some received relief, their inability to resume operations due to lockdown, meant that relief did not extend to the ecosystem of their businesses. Creatives not employed full time could not earn a living by means of short-term employment (Van Graan, 2021), leaving them financially vulnerable. Relief funding is typically set up to focus on institutions and businesses. The focus should also be on individual freelance workers, to effectively support the significant share of workers in this industry earning their living from unstable self-employment and short-term employment. Further, SME's, who are often part of the supply chain for larger companies, carry major risk that is not

buffered by access to government funding as is the case with larger companies with greater turnover. This in itself is not only a major stumbling block in South Africa's drive to stimulate entrepreneurship, but also, as Odeku (2021) points out, to South Africa's transformation agenda. The effectiveness of initiatives aimed at supporting this unique industry should thus not only focus on institutions and businesses but should also focus on individual workers since a significant part of the workforce is self-employed earning a highly fluctuating income from a portfolio of short-term employment contracts (Evans, 2020).

There is no regulatory framework currently in place to protect freelancers or independent production houses, which should be addressed via policy. Criteria for eligibility for funding should be revised to acknowledge the nature of the LETPS freelance work and alternative, formal financing systems should be created so that, for example, more freelancers can better qualify for bank loans.

Those in higher revenue groups were more likely to apply for funding and were approved for funding, leaving lower income groups and freelancers vulnerable. Whilst funding was available, for many in the Performing Arts and Celebration domain of the CCIs, it was 'too little too late' to save them from financial ruin. This was also the case for some in LETPS (see [Iam4theArts Facebook page](#)). The data from the Sun Circle Group (Robinson, 2020) indicates that the financial vulnerability of the lower income groups in the LETPS, became exacerbated

during lockdown. Whilst the reasons for not applying for available relief remain to be investigated, the exclusionary eligibility criteria of government funding and some organisations in the private sector do not consider the nature of employment in the LETPS industry or how the industry is structured. The Department of Sports, Arts and Culture in particular, should pay attention to this matter in order to appropriately support the LETPS and mitigate the financial vulnerability of freelance workers. Further, systems and processes dealing with the applications, decision-making and disbursement - even post-COVID - should be accountable and transparent, with better internal monitoring, so that any problems with possible mismanagement of funding can be traced and dealt with early on.

Whilst positive steps, such as the Presidential Employment Stimulus Programme (PESP) funding applications that opened in November 2020 and closed three weeks later (Gedye, 2021), has been put into place to stimulate the creative economy (NAC, 2020), alleged mismanagement, maladministration and court cases mars its efficacy. The National Arts Council administers the Presidential Employment Stimulus Programme to the amount of R300 million on behalf of the Department of Sport, Arts and Culture (Vilette, 2021) under Minister Mthethwa. The allegations of mismanagement levelled against lead to a 60-day occupation of the NAC offices and the social media campaign #ArtistsLivesMatter (see for example the Iam4theArts Facebook page). The NAC removed creatives by means of a court order and the NAF took the NAC to court in a successful bid to retrieve the portion of its

allocated PESP funding that was unilaterally withdrawn (NAC, 2021). Whilst the NAF had the resources to take the NAC to court, many SME's and freelancers do not have such resources.

Gedye (2021) refers to a report by the South African Roadies Association (SARA) in stating that 12% of those who received PESP funds from the NAC were "collectively paid more than R128-million, which equates to 46% of the funding. In contrast the remaining 1142 recipients divided R150-million amongst themselves." Twenty percent of the top 140 beneficiaries are "either are not registered on the Companies and Intellectual Property Commission (CIPC) database or the government's non-profit organisation (NPO) database or have been deregistered or are in the process of being deregistered and don't have tax clearance certificates." Some of these allegations are under investigation. The *Mail & Guardian* verified through the CIPC database that some of the companies that were beneficiaries were in a process of deregistration during the period that the grants were awarded (Gedye, 2021). Allegations that a number of NAC council members were beneficiaries of the funding were followed by a statement from the DSAC that it sought legal opinion on the matter and that there was no conflict of interest with regards to the applications for funding from the NAC council members (Gedye, 2021). Systematic and continuous monitoring to assess the effectiveness of the COVID-19 funding and economic stimulus funding is clearly needed. South Africa, with its arguably high corruption level in the public sector, may have a greater interest in monitoring and impact evaluation.

The question as to whether all in the LETPS knew where and how to access funding, remains unanswered. SACO (2020a: p. 8) indicated that freelance workers, those operating in the informal CCI economy and face-to-face mode operators were the least informed about the available government funding and were those who qualified for government relief the least often. An integrated database indicating where and how government funding or relief support can be accessed, should have been timeously made available by the DSAC. Application platforms and processes should be tested for readability, user-friendliness and effective feedback-loops and offer users' a regularly updated application tracking process.

Although the growth rate of the CCIs slowed down since 2017, SACO (2022: p. 47) states that a Cultural Satellite Account showed that the CCIs directly contributed 2.97% of South Africa's GDP (R161 billion) in 2020. The total impact (minus paid leave the induced impact brought to bear) on the total impact of the COVID-19 lockdown on the CCIs alone is estimated at -R53,3 billion. The 'knock-on' effect from the CCIs on the broader economy in 2020 was projected to be -R99,7 billion (SACO, 2020b: p. 12). Further, SACO (2022: 49) indicates that there was a decline in South Africa's cultural goods trade, of which Performance and Celebration, Visual Arts and Crafts and Books and Press are "the most significant domains". Although Performance and Celebrations domain's cultural goods exports to the SADC region interestingly showed an upward trend in in 2020, on the whole cultural occupations, international trade in cultural goods and "most cultural services: showed a "dramatic" decline

between 2019 and 2020 (SACO, 2022: p. 50). The contribution of the Performance and Celebration, including the LETPS industry, domain to the ecosystem of the cultural economy, together with the CCIs' not insignificant contribution to the GDP, demand the necessary political will and civil advocacy to develop a long-term national strategy to build the resilience of the sector, secure livelihoods and the sustainability of not only the South African LRTPS industry, but the CCIs as a whole.

The report by SACO that examined the post-COVID effects a year later, revealed slow recovery for the CCI sector, with less 40% could continue with their normal business activities in 2021 (South African Cultural Observatory, 2021). This means that post-COVID longitudinal research is another important avenue to follow to ensure that the progress and obstacles practitioners faced are empirically assessed and properly addressed.

Investigating the general obstacles that financial and application obstacles that the LETPS industry face outside of the COVID-19 context and offers an avenue for future research as it may ascertain the level of difference in qualifying and applying for funding during lockdown and outside of the COVID-19 context. Similarly, the issues with different application processes for COVID-19 relief funding can be comparatively analysed. Further research on the LETPS industry's access to COVID-19 relief funding to other sectors may comparatively and

relationally position these sectors to indicate whether the challenges experience was particular to the LEPS industry, or a national challenge.

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