

COVID-19 and the South African Live Events Industry: Exploring Freelancers' Perspective Regarding the Market and Financial Relief Measures

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Abstract

The impact of the COVID-19 global pandemic on the cultural and creative economy poses a significant threat. The effects were first and intensely experienced by workers in the live event industry and particularly freelancers. The aim of this article is to examine the perspective of freelancers regarding the market and financial relief measures in response to COVID-19 in a South African context. For this article responses of 846 freelancers, who completed an online survey, were analysed. The results showed particularly low levels of access and application for funding supplied by governmental and private sectors to mediate the COVID-19 pandemic effects. Additionally, the lowest-earning individuals, who are the most vulnerable, received virtually no relief. As one of the first studies of its kind on freelancers in the Cultural and Creative Industries in South Africa, it provides an insight into the challenges faced in the gig economy. It could assist with the development of specific policies and recovery measures in the post-COVID-19 era.

Keywords: Event; industry profile; market position; funding implications

Introduction

“The world will not be the same and notwithstanding numerous apocalyptic movies, conspiracy theorists, and political opportunists, we cannot but help to hope that future pandemics can be avoided if we learn the lessons, we should have learned before COVID-19” (He & Harris, 2020: 176). The COVID-19 crisis has exponentially accelerated market changes and the post-pandemic world will bear many wounds that leave inevitable scars. The pandemic, which has caused restricted movement and large-scale lockdowns, is expected to have short- and long-term adverse effects on the cultural and creative sectors (Khlystova et al., 2021). United Nations Educational, Scientific and Cultural Organization (UNESCO) asserted that specialists in the Cultural and Creative Industries (CCIs) across the world, “most of whom were already working part-time, on an informal basis, or under precarious contracts before the pandemic, are struggling to make ends meet”(UNESCO (2020)).

UNESCO's (2021) economic impact report estimated the direct global economic contraction due to COVID-19 within the CCIs to be US\$750 billion. This report established that the CCIs in countries across the globe have been negatively affected by the COVID-19 pandemic, with 2020 revenue losses ranging between approximately 20% to 40%. These significant revenue drops applied across continents: Africa (e.g. South Africa: -38%), Europe (e.g. UK: -30%, France: -25%, Germany: -23%) and North America (e.g. US: -27%). UNESCO however conceded that measuring and finding comparable data on ‘indirect’ or ‘induced’ impacts (such as reduction in turnover, depressed wages, and revenues among suppliers and

other related industries), on individual country level and individual sub-sectors (e.g. live events) remains challenging (UNESCO, 2021).

The Tourism and Economic Development Department in South Africa considered COVID-19 as a particularly challenging phase with an extensive negative impact on the tourism value chain of the country and the livelihoods of those involved in this industry (SABC news, 2021). The numerous events that had to be cancelled or indefinitely postponed, resulted in major financial losses, and projected income disappeared. Several establishments in the live events and technical production industry had to reduce staff and shut down due to the huge loss of income (Sun Circle Group, 2021).

In 2020 the direct economic impact on the CCIs in South Africa, due to the COVID-19 shutdown was more than R53 billion (3,6 billion USD) and the reduction in the country's GDP (direct and indirect impact) to be close to R100 billion in 2020 (SACO, 2020a). In 2020, less than 20% of this sector could continue with 60% or more of their usual business actions, this improved to a mere 36% in 2021 (SACO, 2021). Furthermore, post-COVID-19 recovery of the CCIs remains slower for vulnerable domains, specifically those involved in i) venue-based activities delivered in a face-to-face mode (e.g. live events, celebrations, live music, performing arts); ii) technical and support functions, and iii) high levels of informality and freelancers (UNESCO, 2021). The current study focused on the South African live events industry as one of the sub-sectors in the CCIs whose activities have been severely affected by the pandemic. The South African live events industry represents a collective of privately-owned businesses whose activities involve planning, producing, and implementing live events (Sun Circle Group, 2021). This industry serves people in South Africa by enabling safe public gatherings to encourage robust social, cultural, religious, commercial, and political engagement (Sun Circle Group, 2021). The live events industry plays a major role in supporting the CCIs and therefore should be supported and protected. The industry's collective activities add substantially to the national GDP. This industry does not only provide permanent employment but, on a larger scale, offers freelance work opportunities for a wide range of professional practitioners across the country. Due to the special and intermitted nature of events, the majority of workers in this industry are freelancers (Sun Circle Group, 2021).

This paper aims to examine the perspectives of freelancers in the South African live events industry regarding the market and financial relief measures in response to the COVID-19 global pandemic. This was achieved by i) determining a market profile of freelancers and ii) examining freelancers' perspectives regarding the market and financial relief measures in response to the COVID-19 global pandemic.

Overview of literature

Live events as part of the CCIs

Wood (2009) distinguishes between events based on their purpose and argues that certain event types are created for marketing purposes, while others are developed for other reasons. The South African live events industry offers services to events for both marketing and other purposes. Quinn (2009) categorises events studies into four classes based on the topics, namely: economic impacts; audience analysis, to improve marketing and service quality; the management of events, with a particular concern for enhancing marketing and service quality; and broader event impacts as perceived by residents. Based on this classification the current study focuses specifically on the negative economic impacts on role players in the event industry due to COVID-19.

Events studies can furthermore be classified based on the event size e.g. mega, non-mega, or local events (du Preez & Kruger, 2022; Knott et al., 2015; Pilatt & Horst, 2020; Taks et al., 2015; Pilatti et al., 2020), types e.g. business events or leisure/consumer events (Mair &

Jago, 2010; de Vries & Gunter, 2021) or stakeholders examined e.g. those attending, performing, hosting or organising them, and communities where they are held (Chi et al., 2018; Hermann et al., 2022; Jackson, 2008; Maake et al., 2022, Orthodoxou et al., 2022).

The current study did not focus on a specific event size or type, but rather followed a wider view by examining the position due to COVID of those involved in creating and supplying technical solutions for events of different sizes and types across South Africa. It furthermore focussed on the view of freelancers involved in event management and creation and not the views of residents or attendees. Those involved in live events in South Africa offer a wide range of services such as audio/visual solutions (e.g. lighting, sound, and video), stage design (e.g. setting, lighting, and structures), styling (e.g. costumes, makeup, and decor), event management (e.g. designing, planning, marketing, and coordination) and performing at events (e.g. acting, music and master of ceremonies).

Research interest in events is driven by the proliferation and intensified commodification of events and subsequently growing media coverage (Boucher et al., 2018). Taking advantage of this interest, event studies have emerged in recent decades as “the new kid on the block, an addition to the leisure, and tourism and hospitality fields of study”. The development of event studies has been documented in several reviews and summations of the extant literature (e.g. Lockstone-Binney & Ong, 2019). In addition to the financial gains, there are several other benefits to be obtained from events such as helping destinations and building the image of an attraction; developing tourist trips; helping the arts and music industries; sustaining the career of artists and performers; generating commercial opportunities; contributing to an economic impact; enlarging the tourist season; and generating employment opportunities (Manners et al., 2015).

The United Nations Conference on Trade and Development (UNCTAD), as a UN body responsible for handling development issues in international trade, views the CCIs as one of the most dynamic sectors of international trade. However, developing countries are largely unable to employ creative talent to create jobs and promote exports (Kamal, et al., 2019). In South Africa, the CCIs are largely unregulated, and highly fragmented mostly in part of the informal sector, which often leads to pressures of exploitation, poverty, social inequality, economic development, monopoly, and unfair practices (Parliamentary Monitoring Group, 2022). Fairwork’s (2020) rapport on informal, freelance, or gig economy workers found that the non-standard employment status of these workers during COVID-19 has made them particularly vulnerable during an economic shutdown. Most freelancers have lost their jobs entirely, while those able to work during lockdown have, on average, lost four-fifths of their income (Fairwork, 2020).

Impact of the COVID-19 pandemic on the CCIs

Past studies offer valuable insight into COVID-19 trends and their impact on CCIs in countries across continents (i.e. Asia: Kumar & Sharma, 2021; Lee et al., 2022; North America: Barrero et al., 2020; Jeannotte, 2021; South America (e.g. de Jesus, 2020; Serafini & Novosel, 2020; Europe: Agostino et al., 2020; Banks & O’Connor, 2020; Australia: Botherway, 2020; Cowell, 2020; Pacella et al., 2020). However, investigations on the impact of the COVID-19 pandemic on the creative industries in emerging African countries are limited to a handful of exceptions (i.e. Apuke & Omar, 2021; Ocholla, 2021; Tsekea & Chigwada, 2020). Nonetheless, none of the reviewed studies examined the impact on freelancers in the live events industry in South Africa.

Prominent scholars and international cultural organizations acknowledge the dire need for research in emerging markets and thereby offering an inclusive industry perspective. This can give a voice not only to those employed full-time but particularly those often working on

an unofficial basis and struggling to make ends meet (UNESCO, 2020). Boucher et al., (2018) call for example on researchers to conduct surveys with freelancers in service industries, such as the live events industry, that could help to promote local entrepreneurial activities and offer viable employment for the unemployed and underemployed.

COVID-19 support and relief measures

When inspecting the research on COVID-19 support and relief measures, some specific noteworthy trends and challenges can be identified. Betzler et al., (2020) as well as Dümcke (2021) report that wealthier countries (e.g. Germany, the Netherlands, and Switzerland) known for a history of prominent cultural expenditure, offered higher aid packages and implemented strategic interventions more effectively than other poorer EU countries (e.g. the Czech Republic, Slovenia, Portugal). Aid packages were mainly aimed at preventing national institutions and large companies based in urban centres from capsizing, with little support to smaller independent providers or freelancers.

The meta-analysis of surveys and research projects by Comunian and England (2020), identified fundamental challenges in the UK CCIs, namely i) the lack of emergency funding; ii) complex processes and strict criteria to access government support funds, iii) limited understanding of government support options and requirements, and iv) a substantial lack of support for freelancers or those self-employed. The analyses of financial data in the Slovak Republic by Majdúchová and Rybárová (2021) suggest that access to funding was a problem for businesses in the CCIs even before the negative impact of COVID-19. They concluded that the accounting structure of assets does not consider intangible assets (e.g. copyrights, licences, trademarks), which meant that these could not serve as hedging instruments acceptable credit sources and subsequently high-risk ratings by financial institutions.

Research methodology

A research design helps with guiding and planning data collection and analysis (Zikmund et al., 2021). This study made use of secondary analysis, which involves the use of existing data, gathered for another study to meet a research aim that is different from that of the initial work; this may be a different research question or a different angle to the primary question (Heaton, 2008). In this situation, the data were gathered by the Sun Circle Group via a large-scale online survey. The Sun Circle Group is a media company that supports the live entertainment and professional audio-visual industries in South Africa. They consequently implemented a large-scale online survey to estimate the contribution that the sector makes to the country's GDP, the number of jobs the industry creates, and the effect of the national lockdown on the industry's short and medium survival.

Internet-mediated research (IMR) was used in this study to recruit a sample and collect data from 846 freelancers who completed an online survey. This is in line with other studies that examined the effects of COVID-19 that also applied IMR methods to generate high-quality, valid data using non-probability volunteer samples (e.g. Khlystova et al., 2022; Jiang & Wen, 2020).

IMR furthermore allowed the current project to benefit in terms of acquiring large sample sizes more rapidly and at a lower cost than offline research, but also reaching very specific and hard-to-acquire populations. However, probability sampling is not possible in IMR, due to the lack of a list of Internet users (Fielding et al., 2017). 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 pertinent to the current research comprised freelancers older than 18 years who are involved in the South African events industry. To recruit freelancers to participate in the survey, a targeted social media campaign was distributed via

key associations representing the stakeholders in the industry (e.g. Association of African Exhibition Organisers, Council of Event Professionals Africa, Event Safety Council, South African Events Council, Southern African Communications and Event Industries Association, Technical Production Services Associations, etc.) This is in line with Fielding et al., (2017) asserting that a common IMR sampling technique to obtain volunteer samples is to place advertisements in the form of invitations on public websites or social media networks for potential participants to respond to if they wish. The respondents to the targeted social media campaign for this project were furthermore requested to complete screening questions to ensure they meet the sample requirements before completing the questionnaire. Online surveys are regarded as a suitable data collection method for this study based on the high penetration of electronic devices and mobiles in South Africa (Cilliers et al., 2018) and in this industry. It also has unique advantages such as improved concurrent validity, and efficacy of data collection, while decreasing random measurement error and generally desirable responses (Fielding et al., 2017).

A structured online-administered questionnaire was appropriate for collecting data that can be quantified and used to determine the market profile and perspectives regarding the market and financial relief measures in response to the COVID-19 global pandemic.

The questionnaires were distributed via a social media campaign targeting the industry and respondents were invited to complete them voluntarily and unanimously via an online application. A personalised introduction explaining the purpose of the research, that participation is voluntary, and assuring confidentiality and related issues accompanied the questionnaire.

Relevant ethical issues of this study were considered and adhered to. The contact details regarding the original survey respondents were not supplied to the researchers of the current study. This eliminated compromising the confidentiality of the data obtained. Approval was granted by Sun Circle Group to use the secondary data in further analysis to determine the South African events industry's market position and perceived financial impact due to COVID-19. Ethical clearance was obtained from the University regarding the use of the secondary data. The respondents were invited to complete an online structured questionnaire containing two parts. The first part (a) gathered information about the market profile of the freelancers and included questions on the following: i) spatial distribution; ii) sources and level of income, and iii) experience and edification. The second part (b) of the instrument measured freelancers' perspectives regarding the market and financial relief applied and received during COVID-19.

Results

The results in terms of the market profile and position regarding the market and financial relief measures are presented in the following sections.

Market profile of freelancers

Spatial distribution

Responses from freelancers in the industry were received from all nine provinces in South Africa. The majority of the respondents were freelancers positioned in the Gauteng province (472; 55.8%), followed by those in the Western Cape (250; 29.6%). Though people from the other seven provinces (Limpopo; Kwa-Zulu Natal; Free State, North-West; Northern Cape; Mpumalanga, Eastern Cape) also participated in the research. The view obtained in this project represents the industry of freelancers who are temporary workers and independent contractors across South Africa. The concentration of replies from these two larger provinces represents the geographical distribution of the CCIs in this sector of South Africa, which is concentrated in the metropolitan areas (SACO, 2020b), reasonably well.

Sources and level of income

The sources and levels of income can be seen in Table 1. Total monthly earnings of R19 664,937,00 (110,231,411.05USD) for all the freelancers are set out in Table 1a. When bearing in mind the average earnings per month of R23,217 (1,301.42 USD) and the median of R15,000 (840.82 USD) per freelancer, it suggests an extremely skewed distribution, where 75% of the respondents earned considerably less than the average. The bottom 25% obtained monthly earnings of less than R7,500 (420.41 USD). Half of them produced monthly earnings of R15,000 (840.82 USD). The top 25% of the freelancers' monthly earnings were more than R30,000 (1,681.64 USD).

The total number of different event suppliers the freelancers worked for on an annual basis is also reflected in Table 1b. It can be seen that only a few of them worked for a single company (19.1%; 162). The trend is rather that most of these freelancers performed services for different event companies, with most of them working for four to five companies (251; 9.7%) and six or more different companies (259; 30.6%). Performing services for a large number of companies as opposed to being employed by one company might have the benefit of flexibility, but less stability is also likely.

Table 1. Sources and level of income

1a. Estimated average earnings per month (n=846)			
30	25.7	28.1	25.5
25			20.7
20			
15			
10			
5			
0			
	≤R7500	R7501-R15 000	R15 001-R30 000
	(≤477,75 USD)	(477.75 – 955,56 USD)	(955.56 - 1,911,02 USD)
			(1,911,02 USD +)
1b. Number of different event companies worked for over the past 12 months			
	Frequency	Valid Percent	Cumulative Percent
1 company	162	19.1%	19.1%
2-3 companies	174	20.6%	39.7%
4-5 companies	251	29.7%	69.4%
6 +companies	259	30.6%	100.0%

Experience and expertise

The results showed that most of the temporary workers have the expertise as technical crew (e.g. dealing with sound, lighting, staging and sets, rigging, audio visual, LED tech, drivers, and stage management) (507; 59.9%). This is followed by expertise in being entertainers at events (e.g. actor, musician, DJ, performer, promoter, model, master of ceremonies, or mic controller) (133; 15.7%), event managers/coordinators (81; 9.6%). Some had skills in film (e.g. video or photography (46; 5.4%) and others were experienced as wardrobe- or makeup stylists (18; 2.1%). They also have a variety of other individual expertise types (e.g. marketing/design: 7; 0.8%; security/safety: 5; 0.6%; catering/hospitality: 3; 0.4%; tradesman such as a carpenter, electrician, painter, signage: 1, 0.1% and miscellaneous: 45; 5.3%). The temporary workers employed as freelancers represent a wide variety of individual expertise areas in the industry. The majority (464; 55.8%) of the respondents have more than 10 years of experience in the industry. This is followed by those with 3-5 years (181; 21.4%) and 6-9 years of experience in the industry (179; 21.2%). A very small portion has less than 3 years of industry experience (22; 2.6%). Most of the workers have extensive experience in the industry.



In terms of education levels and training, approximately one-third (267) are qualified on an NQF level 4 - Grade 12 (National Senior Certificate), with only a small portion lower than this NQF level (96; 11.4%). Close to 60% of the freelancers (476, 56.9%) have academic qualifications on NQF level 5 and higher.

A formal academic qualification is not the only avenue for education, seeing that the majority (491; 58.8%) have completed industry training courses. The relatively high number of people who obtained industry training courses suggests that an academic qualification is not the only way to obtain skills in this industry.

Table 2. Expertise and experience

<i>2a. Type of expertise</i>	<i>Frequency</i>	<i>Percent</i>
Technical Crew	507	59.9%
Entertainer	133	15.7%
Event Manager - Coordinator	81	9.6%
Film - Video – Photographic	46	5.4%
Stylists	18	2.1%
Other skills	61	7.2%
Total	846	100
<i>2b. Years of experience in the industry (Q6)</i>	<i>Frequency</i>	<i>Percent</i>
Less than 3 Years	22	2.6%
3-5 years	181	21.4%
6-9 years	179	21.2%
10-19 years	278	32.9%
20-30 years	139	16.4%
30 years plus	47	5.6%
Total	846	100

COVID-19 recovery measures and funding

The financial implications of COVID-19 funding on freelancers in the South African industry have been examined in terms of the funding application and success rates. For this analysis Temporary Employee/Employer Relief Scheme (TERS) funding and business relief funding from government departments, private institutions, and banks accessible to this industry were considered.

In South Africa, the government, financial institutions, and the private sector introduced some financial relief measures in an attempt to alleviate the negative impact of the COVID-19 pandemic. The analysis determined whether freelancers were successful in obtaining TERS funding and other potential sources of financial support (i.e. UIF, banks; government departments, and private institutions). The potential relief funds are therefore firstly briefly explained. The COVID-19 TERS was created for businesses in the formal and informal economy with employees that are registered with and contribute to the Unemployment Insurance Fund (UIF). In theory, it also included those working at venues for professional sports, cultural, events, and live performances (GroundUp, 2020).

The private sector furthermore implemented specific strategies to assist individuals and businesses during the national lockdown for which businesses in the CCIs could apply. This for example included the Artist Relief Grant of Business and Arts South Africa (BASA, 2020) which was set up with donations from individuals, businesses, and academic institutions to help artists and cultural workers (BASA, 2020). Furthermore, customers with a reasonable financial track record could apply at banks for a three-month payment holiday (BASA, 2020).

TERS funding

In terms of applying for TERS funding (see Table 3 a), only a small portion (85; 21.8%) of the freelancers were confident in the process and informed about requirements, and thus applied

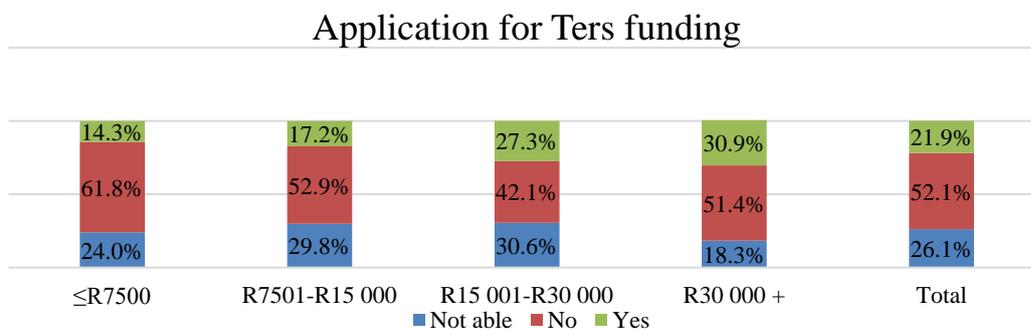


for TERS funding. It is thus worrying that the majority of the respondents did not apply (441; 52.1%) or were unable to apply for TERS funding (221; 26.1%).

When assessing the application ratios in terms of average earnings per month, it is notable that the two categories of freelancers with the lowest monthly earnings ($\leq R7,500$ / $\leq 477,75$ USD and $R7,501-R15,000/477,75 -955,56$ USD) are associated with lower TERS submission propensity (134; 14.3%; and 41; 17.2%).

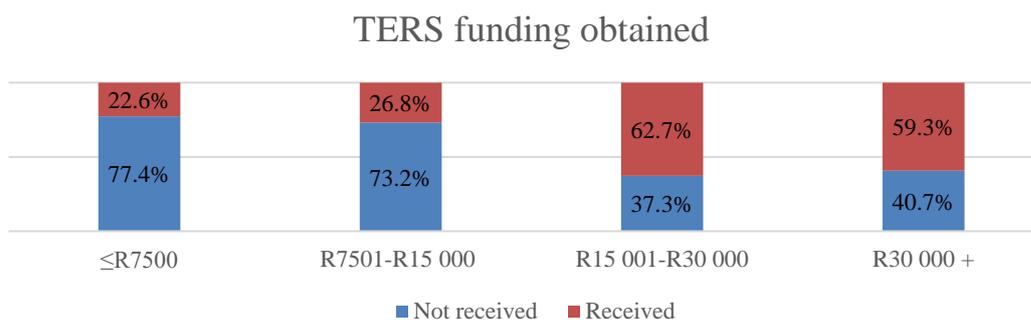
Table 3: Application and obtaining of TERS funding

3.a Application for TERS funding										
Average earnings per month										
	$\leq R7,500$ ($\leq 477,75$ USD)		$R7,501-R15,000$ ($477,75 - 955,56$ USD)		$R15,001-R30,000$ ($955,56 - 1,911,02$ USD)		$R30,000 +$ ($1,911,02$ USD+)		Total	
Applied	N	%	n	%	n	%	n	%	n	%
Yes	31	14.3%	41	17.2%	59	27.3%	54	30.9%	185	21.9%
No	134	61.8%	126	52.9%	91	42.1%	90	51.4%	441	52.1%
Unable to apply	52	24.0	71	29.8	66	30.6	32	18.4	221	26.1%
Total	217	100%	238	100%	216	100%	175	100%	846	100



$\leq R7,500$ ($\leq 477,75$ USD) $R7,501-R15,000$ ($477,75 -955,56$ USD) $R15,001-R30,000$ ($955,56 - 1,911,02$ USD) $R30,000 +$ ($1,911,02$ USD+)

3.b TERS funding obtained



$\leq R7,500$ ($\leq 477,75$ USD) $R7,501-R15,000$ ($477,75 -955,56$ USD) $R15,001-R30,000$ ($955,56 - 1,911,02$ USD) $R30,000 +$ ($1,911,02$ USD+)

Average earnings per month	Applied		Not received		Received	
	n	%	n	%	n	%
$\leq R7500$ (≤ 477.75 USD)	31	14.3%	24	77.4%	7	22.6%
$R7501-R15\ 000$ ($477.75 -955.56$ USD)	41	17.2%	30	73.2%	11	26.8%
$R15\ 001-R30\ 000$ ($955.56 - 1,911.02$ USD)	59	27.3%	22	37.3%	37	62.7%
$R30\ 000 +$ ($1,911.02$ USD)	54	30.9%	22	40.7%	32	59.3%
	185	21.8%	98	53.0%	87	47.0%

In terms of procurement of TERS funding by the freelancers who applied (see 3b), most of them (87; 53.0%) were unsuccessful despite applying. When considering TERS funding obtained, yet again high-income respondents were linked to higher achievement in terms of funds procured (Figure 4b). More than 70% of freelancers in the two highest income categories (R15,001-R30,000/955,56 - 1,911,02USD and R30,000 +/1,911,02 USD) received funding, while 40% and less in the two lowest income categories were successful.

Other potential sources of financial support

The procurement from other potential sources of funding and business relief funding from government departments, private institutions, and banks accessible to this industry is indicated in Table 4.

UIF: Overall only a third (286; 33.8%) of the respondents were registered or paid UIF, but the majority (561; 66.2%) were not. This inclination applied irrespective of income levels. This means that they did not receive short-term relief when they became unemployed or were unable to work because of the TERS benefits, since UIF registration is a requirement to obtain this. The inability and unwillingness to register for UIF need to be understood in light of this system known to face technical problems and abuse due to fraud by some companies as well as government employees (Magubane, 2021).

Relief from financial intuitions /banks: Inadequate COVID-19 relief money was also attained from financial institutions or banks. The majority of freelancers (699; 82.5%) did not obtain any form of relief, with only a small portion reporting some relief received from their banks (148; 17.5%). Consequently, most of them (749; 88.4%) are negative towards these institutions since they believe that they did not assist them with sufficient and essential relief funding.

Comparable to TERS subsidy patterns, once again the most vulnerable and lowest earning individuals (\leq R7,500/ \leq 477,75USD) received virtually no relief from their banks (199; 91.7%;). Only 8,3% (18) of the freelancers in this low-income group received help funding from their banks, though those in the two highest income classes (R15,001-R30,000/ 955,56 - 1,911,02USD and R30,000 +/1,911,02+ USD) were three times more successful in terms of relative application share (24%; 25.6%).

Received relief funding during COVID-19 from government departments / private institutions

Overall only 156 (18.4%) of the freelancers obtained some relief funding during the COVID-19 from government departments / private institutions. Unfortunately, most of them (690; 81.6%) did not obtain any relief. This trend of restricted support was clear for all income levels. The freelancers in this industry are exceptionally susceptible to economic declines and especially during the COVID-19 pandemic since numerous occupied in the sector are freelancers who are temporarily employed. This sector is furthermore characterised by extensive informality, as well as face-to-face production modes. The most severely affected due to their incapability to carry on with their professional activities are workers the most at risk, usually freelancers in the informal sector and acting as face-to-face mode operators. Unfortunately, these were also the groups who were least knowledgeable about the types of government support obtainable and who meet the set requirements.



Table 4. Procurement of other potential sources of financial support

Average earnings per month		4.1 Registered with / pay towards UIF?		4.2 Received any form of relief from Banks		4.3 Bank has assisted with sufficient & helpful relief		4.4 Received relief Funding during COVID19 from government departments / private institutions	
		Yes	No	Yes	No	Yes	No	Yes	No
≤R7,500 (≤477.75USD)	Yes	65	30.0%	18	8.3%	17	7.8%	46	21.2%
	No	187	70.0%	199	91.7%	200	92.2%	171	78.8%
R7,501-R15,000 (477.75 - 955,56USD)	Yes	79	33%	33	14%	21	9%	48	20%
	No	159	67%	205	86%	217	91%	190	80%
R15,001-R30,000 (955,56 - 1,911,02USD)	Yes	70	32%	52	24%	31	14%	41	19%
	No	146	68%	164	76%	185	86%	175	81%
R30,000 +(1,911.02+ USD)	Yes	72	40.9%	45	25.6%	29	16.5%	21	11.9%
	No	104	59.1%	131	74.4%	147	83.5%	155	88.1%
All	Yes	286	33.8%	148	17.5%	98	11.6%	156	18.4%
	No	561	66.2%	699	82.5%	749	88.4%	691	81.6%

Discussion

The results regarding the market profile showed that freelancers contribute significantly to the industry and economy of South Africa and the average earnings are relatively widespread. The findings furthermore revealed large differences in the level of income and number of potential employment sources. This suggests that this sector of the CCIs is especially vulnerable in South Africa as an emerging country. This is aligned with the attributes of CCIs identified in the international literature (Khlystova et al., 2021).

This short-term nature and uncertainty of contract work are surely challenging, even more so during the pandemic. This is likely to continue with the declining public support for culture in South Africa as well as other countries, compelling creative workers to rely increasingly on short-term, uncertain contract work (the so-called “gig” economy). These jobs offer fewer benefits of longer-term, more permanent employment, and workers in these sectors tend to be less organised (in terms of labour movements, like unions). This means that many cultural workers have little job security or access to other benefits, like employer-supported health insurance or unemployment benefits (South African Cultural Observatory, 2020).

An analysis conducted in 2018 by Snowball and Hadisi (2020), before COVID-19, reported that almost half of those working in cultural and creative occupations in South Africa are in the informal sector, with a much larger share of them being freelancers. They reported that 34% of CCIs are in the informal sector compared to 10% of non-CCIs workers. The Department of Arts and Culture furthermore asserts a continual increase in skills levels in this sector, with the majority of them being skilled and progressively well-educated with several having tertiary education (SACO, 2020a). The high level of experience and expertise found in the current study is aligned with these academic articles and governmental reports (Snowball & Hadisi 2022; SACO, 2020b).

The highly qualified freelancers reported in the current study confirm the increasing levels of skills and tertiary education in the CCIs, as reported by Hadisi and Snowball (2020), however, the industry still offers employment to a relatively large portion of people with grade 12 (31,6%).

The lack of awareness and low levels of application for funding in this study are similar to challenges reported by Comunian and England (2020). They identified similar challenges to access funding in the UK context, due to difficult processes and narrow criteria to access government support funds, limited lack of knowledge about government support opportunities

by applicants, and an appalling lack of support for freelancers or those self-employed in the industry.

The results additionally revealed that the lowest-earning individuals, who are the most vulnerable, received virtually no relief. A comparable challenge was also observed in more developed countries across Europe by Betzler et al. (2020) reporting that aid favouring larger companies with workers earning higher incomes in urban areas compared to smaller independent workers or freelancers earning less.

It was furthermore found that the subsidy set aside by the government to financial institutions did not readily reach the CCIs examined. Banks in South Africa appeared to abide by standard loan procedures and individuals might not have understood how to comply and were not given funding or advice. This is in line with the overall lack of funding in the Slovak Republic even before the negative impact of COVID-19, partly due to the accounting structure of assets not considering intangible assets and high-risk ratings by financial institutions (Majdúchová & Rybárová, 2021).

Conclusion

The results showed that only a small portion of the freelancers in this industry could apply or obtain funding from the government and private sector aimed at mediating COVID-19 pandemic effects. Additionally, the lowest-earning individuals and the most vulnerable obtained virtually no relief. The results of this study have some practical implications for the industry. There is a dire need to refine and develop specific policies to advance cultural and creative abilities and survival in South Africa. These policies could involve the following: i) cultural policies designed to overcome the gap between developed and developing countries by assuring the rights of intellectuals and innovators, and ii) financing policies aimed at addressing limited funding as one of the foremost impediments facing CCIs. The budget allocated to this sector in most emerging markets is trivial compared to other sectors. The financing policy ought to expand funding sources to bring in public finance, private investments, commercial loans, public-private partnership as well as international cooperation projects.

Furthermore, part of this should be offering information and training about financing opportunities, financial management, and business models to quantify this sector for investors and lenders as investment prospects. Regulatory policies should also be developed since CCIs typically suffer from weak regulatory measures to advance this vital sector. Poor regulation results in ever-growing requirements for financial resources and reduces the ability to preserve intellectual property rights.

This study's scope was limited to the perspective of freelancers who completed the survey during COVID-19. The use of IMR and associated non-probability sampling does not allow for the generalisation of findings. Despite the large sample used in this project, a more extensive study is needed to generalise the findings. Future research should be expanded to examine the market response in the post-pandemic world and consider including other industry shareholders like the government, business owners, and attendees of live events. A worthy future research agenda could be to conduct a comparative investigation with other emerging and developing countries or to compare tourism, cultural, sports, and recreation domains within the CCIs.

A geographical viewpoint and investigations from the spatial tradition are needed when analysing spaces of vulnerability in the hospitality, tourism, and leisure sectors (Rogerson & Rogerson, 2020). Following this viewpoint, the current study contributes to an understanding of the COVID-19 market implications in the live events industry of South Africa and could assist in the development of specific policies and recovery measures in the Post COVID-19

era. It is one of the first articles to examine the impact of COVID-19 on freelancers in the CCIs, thereby shedding some light on the needs of freelancers in the gig economy.

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