

SOUTH AFRICAN CULTURAL OBSERVATORY

Impact Analysis Live Music and its Venues and the South African economy during COVID 19

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South African Cultural Observatory

Report

Impact Analysis

**Live Music and its Venues and the South
African economy during COVID-19**

September 2020

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EXECUTIVE SUMMARY

This research follows up the SACO survey on the impact of COVID-19 across the whole South African creative and cultural industry landscape, published in May 2020, by applying a more detailed lens to the specific impact on the live music industry and its venues.

The research gathered 697 responses by means of an online qualitative and quantitative survey, conducted seven in-depth case interviews, and undertook extensive desk research on the most recent international publications and research on the impact of COVID-19 on the creative and cultural industries. Survey respondents came from all South Africa's provinces (with Gauteng, the Western Cape and KwaZuluNatal dominating), worked along all segments of the music value chain and included representatives of all music genres.

The data presents a picture of a highly interconnected value chain, where venues and other music delivery mechanisms serve as hubs for music practitioners; the loss of one venue impacts on the work and revenue opportunities of multiple other industry professionals. Multiple revenue interdependencies emerge, with 47% of artists, promoters, freelancers and venues highly dependent on confirmed local engagements, but also revenue from food, bar and ticket sales, door takings and other sources.

A majority of the sample had previously been operating for more than five years, but the impact of COVID-19 has been devastating even on these established practitioners. 90% of the live music industry lost income due to COVID-19 and 25% indicated that they would not be able to continue with any elements of their business under lockdown.

Industry professionals have attempted to respond flexibly and with agility to the crisis, with 88% attempting various online music alternatives in a very short space of time. However many had to resort to more severe measures such as terminating short term contracts (23%), retrenching employees (13%) or cutting employee salaries (18%). Only 6% of respondents could continue to pay all employees. Recent research by Concerts SA also revealed that while the online platforms have been essential to ensure the survival of the sector under lockdown, the revenue levels from live streaming and Video-on-Demand (VOD) work have not matched earnings from live performance in the case of almost all role players. Just under 50% of the sample expressed significant concerns about their future prospects in the music industry, citing the ongoing uncertainty with respect to the longer term impact of the pandemic on audiences and society and concerns with respect to their ability to operate without an integrated recovery plan.

The predominantly informal and project-based nature of all music-related work means that many industry actors were unable or ineligible to apply for or secure any form of government COVID relief support, since all required extensive formal documentation. Only 7% reported that they had successfully applied for the various SMME support mechanisms available while 21% indicated that they had successfully applied to the Department of Sport, Arts and Culture for funding. Without access to support, many have resorted to the sale of equipment and assets, and reliance on financial support from friends and family.

Respondents appealed for flexible, integrated support across administrative boundaries and government portfolios, both financial and in-kind. The participants also called for decentralisation of programmes, projects and infrastructure, with a focus on the local – from compliance with local content quotas to a funding shift away from largescale events towards local music initiatives, venues and performance spaces. They requested access to a range of government-controlled spaces to conduct safe music activities, including recording for live streaming, and support for the purchase of digital equipment, as well as training opportunities in utilising digital technology.

However, many noted that inequality, and especially the country's digital divide, precluded many from participating in the pivot to online music, significantly hampering the efforts of many who may have intended to adopt digital transformation strategies to survive and secure their future. Another significant factor was a perceived lack of efficiency, integrity, effectiveness and practical industry understanding among the officials at all levels of government with whom they had to deal.

Yet despite these issues, South Africa's live music practitioners expressed a high degree of – albeit conditional – hope about the future of the industry. With appropriate and relevant supports in place, just under half declared themselves optimistic about their future in the industry.

CASE STUDY ONE: WHERE IT ALL STARTS – CREATIVITY

MUSICIANS SHANE COOPER, SYDNEY MAVUNDLA, SHANE COOPER AND SIYA MAKUZENI REFLECT

"I've never been away from music for that long since I was 14," says bassist Shane Cooper. "And it all happened so fast: six months of booked work gone in five days. It was like skittles going down." For Romy Brauteseth, another bassist, "This happened at the worst time, because of the dry season for live music in December-February. Musicians used up their resources, and just when we thought we'd begin earning, the rug's been pulled out," she says. That experience of the impact of COVID is one all performers share. Trumpeter Sydney Mavundla speaks to despairing colleagues across genres who sold all their hard-earned equipment simply to pay bills.

The loss is not simply monetary. "When you're sitting at home composing," says Mavundla, "it's like a craving. You want to hear how it'll sound; you want audiences to hear it. That's our gasoline; it's what we run on." Brauteseth adds: "Much as we play music for ourselves and the wonderful moments of bliss when we're locking into our fellow musicians and speaking a wordless language that says so much, we also play because it brings joy and may make a difference...If it speaks to at least one person in the room, we're doing something meaningful outside ourselves."

Musicians have turned to live streaming as an alternative outlet for creativity, but sometimes the intensive creative format of playing with very limited rehearsal opportunity and for no audience poses creative challenges. Pre-rehearsal under lockdown was limited to distant communication, with only a few hours together in the studio pre-broadcast. Brauteseth missed "physically getting together, playing, and then sleeping on it. That's when we process, and [what] helps us sit together as a unit when we perform." Artists also miss the live audience. "Comments or numbers through a screen can never be a substitute for feeling the audience energy in a room," says Brauteseth.

Singer, composer and trombonist Siya Makuzeni felt a need to confront the social impact of COVID directly in her first live streamed session. "People are going through feelings of depression and isolation: division, driven by a constant barrage of fear. I wondered if there wasn't a more positive, inclusive approach, focusing on what unites us rather than divides." So her set comforted, invoked spirituality and used effects pedals to invite a whole Xhosa choir onstage for one song – finding a way to sonically subvert social distancing.

None of these artists expects short-term live stream earnings to do much towards paying the bills. Cooper compares the immediate revenue, at best, to "a gig in [a small neighbourhood jazz club]." They're slightly more hopeful about a longer revenue tail, and eager to see marketing to reinforce that potential.

However, they value live streaming opportunities for the energy they rekindle. "Even if it's not so lucrative," says Mavundla, "we have to learn to handle the new normal. When I came off the [live stream] stage, I felt alive again."

Yet not every South African artist can access this. A huge social gap – as all the musicians interviewed pointed out – exists among South African performers as well as audiences. Countless community musicians lack data, equipment and sometimes even electricity and so cannot live stream. "A standard's being set that many won't be able to compete with," says Brauteseth.

Further, the first wave of COVID relief for artists, everybody notes, did not fit how music freelancers work. "There was such a limited application timeframe it became an 'administration race' – and they didn't accept the documents we use, such as screenshots of WhatsApp letters of engagement," says Cooper. "A relief fund is pertinent," says Makuzeni, "but one that assists everybody, not just a few, until lockdown lifts." To help artists live stream, "we need digital hubs with the necessary resources, open to all artists," she says. Mavundla points out how many suitable facilities government could access, including "largely empty" SABC studios. "We don't want handouts; we want to work. Invest: help us create content. There's always a way of making gigs happen," he says.

(A longer version of this report was first published at www.newframe.com on 12 June 2020. Permission to use their responses in this research context has been obtained from all interviewees quoted)

CHAPTER ONE: BACKGROUND AND CONTEXT FOR THE RESEARCH

"I have lost everything. All income, accommodation, everything" – Research respondent

When, in May 2020, the South African Cultural Observatory (SACO) submitted its first quantitative study report on this topic, *Measuring the Impact of the COVID-19 Crisis on the Cultural and Creative Industries in South Africa: An early assessment* (SACO 2020; i)ⁱ, the severity of the damage pandemic-related restrictions were inflicting on

South Africa's creative sector (the creative and cultural industries: CCI) was already clear. 95% of the survey's 595 respondents – firms and individuals across all creative activities – had already experienced cancellations of work. In industries that had previously provided 867,196 jobs at all skills levels, and demonstrated a 2-4% annual growth trajectory, 45% of respondents now reported themselves unable to continue with their activities at all, while a further 25% could continue only a small proportion. Of the 69% of respondents who characterised their mode of production as dependent on face-to-face interactions, 88% said they could not continue working. At that time, SACO calculated that the shutdown among all CCIs could be expected to reduce South Africa's Gross Domestic Product (GDP) by R99.7Bn.

In an era when the music industry value-chain has been transformed, with live performance and what can be leveraged from it now the highest-value products, such performances have been rendered impossible for a substantial period of time through restrictions on mobility, hospitality and sociality. This follows nearly a decade prior to the pandemic in South Africa that was constrained by political instability, with business confidence and already limited disposable incomes dipping, but where live performance – locally and internationally – was growing steadily as a revenue stream. Worldwide, pre the pandemic, live music attendance increased threefold in 2019. Meanwhile 75% of South Africans in the 2019 IFPI *Music Listening* survey classified themselves as music-lovers or music fanatics – the highest percentage in any country the organisation surveyed (IFPI 2020)ⁱⁱ, indicating sustained audience potential for both live and live streamed music.

Additional infrastructural factors also constrain South African live music as they do many other sectors. As one example, the July 2020 OECD economic country surveyⁱⁱⁱ notes the economic burden of load-shedding, in a situation where music requires electricity to support both functioning in a venue with a live audience and live streaming for an online audience. The lack of access to high speed, low cost internet capability is also a major constraint on the development of viable online markets for live streamed or video on-demand (VoD) music content.

Although some characteristics of the CCIs, such as the highly skilled profile of many practitioners, might be conducive to greater resilience post-COVID, others – and in particular the weakness of professional organisation and the inherent project-based precarity of many CCI activities – contribute to vulnerability. Added to this, the economic wellbeing of the CCIs is highly sensitive to fluctuations in GDP; many arts

and creative activities depend on consumers' disposable income, often depressed when GDP falls. Further, the many horizontal linkages between CCIs and other sectors create interdependence, meaning shocks can trigger a significant multiplier effect.

SACO noted that the most vulnerable of CCI activities was what was defined by UNESCO^{iv} as 'Performance and Celebration', within which live music is located. In that activity, nearly 80% of respondents noted they would be unable or almost unable to continue with work activities. Another SACO study, the economic mapping exercise, *South Africa's international trade in cultural products: a focus on the EU in a comparative regional setting (SACO 2020, ii)*^v, demonstrates the robust performance of the 'Performance and Celebration' activity as an exporter to the European Union, while other SACO studies have indicated the activity's strong performance in employment equity. Thus the diminution of this activity could have negative consequences for the economy as well as the cultural ecosystem.

As the pandemic, and the ripples of consequence from measures to contain it, continue, it therefore becomes important to revisit the May 2020 impact study, both in its totality, and by taking a more detailed lens to specific activities and sectors within them. Thus this research project revisits the question of the COVID CCI impact by focusing on South African live music. It was conducted for SACO by IKS Cultural Consulting, a research and project management organisation in creative industries, specialising in the live music sector.

There are important reasons for this focus on live music and its venues. Both SACO's own findings outlined above, anecdotal South African evidence and media reporting, and many Africa-continental and other international studies, have underlined the situation of live music as a sector particularly hard-hit by pandemic measures and particularly vulnerable during what may be a tough, uncertain and protracted recovery period. Chapter Three below will outline the findings of these studies and their relevance to the South African context in more detail. Additionally, live music has a potentially important role in social and economic recovery overall, because of its multiple business linkages as well as the roles it can play in the recovery and maintenance of health and wellbeing, as now explicitly acknowledged by the World Health Organisation (Fancourt & Finn for WHO 2019)^{vi}, and in collective societal sense-making. These contributions are the focus of Chapter Six Section 6.2. Throughout these discussions, the interaction between music performance and its venues is foregrounded, because live music always requires a space of some description to interact with an audience; the venue is the bedrock of music performance activities.

Further, although the work of SACO has already significantly enhanced South African policy-makers' access to CCI information, there is still limited detail available for individual activities such as live music. Dominated by freelance individuals and often unregistered micro-enterprises, sometimes, as in the case of traditional music circuits, operating outside metropolitan areas, the situation of South African live music continues to reflect what the UNESCO Creative Economy Report (UNESCO, 2008)^{vii} noted more generally a dozen years ago: "The great majority of creative and cultural production in Africa takes place in the informal sector, for which statistics are nonexistent." Through the wide reach of its survey, this research permits further updating of the national mapping begun by Concerts SA, *Song Lines* (CSA, 2013)^{viii},

and continued online on the Concerts SA website, <https://www.concertssa.co.za/venuesmap/>, the first such exercise undertaken for the South African live music scene, following a live music study by Moshito and Mmino in 2010.

In terms of report structure, Chapter Two outlines the research goals and research questions that are the objects of this study. Chapter Three surveys the literature, with a particular focus on music sector studies and reports, and situates this research enquiry within it, without duplicating the very extensive and detailed economic literature survey contained in SACO, 2020 (i). Chapter Four describes and discusses the methodology adopted, with specific consideration of the utility of the UNESCO Cultural Domains and the rationale for the mixed-methods approach adopted here.

Chapter Five presents and analyses the results of the survey, which was conducted in August/early September 2020. It highlights the devastating impact of lost income and the agility and surprising optimism with which the industry has attempted to respond and survive, despite the unfavourable context. Chapter Six discusses these findings in the context of the broader socio-economic landscape, exploring the centrality of infrastructures facilitating hospitality, mobility and (actual and virtual) sociality for the future recovery and resilience of live music. It presents policy recommendations that may support these and considers the distinctive features of live music as both a business sector and a cultural activity, and its potential contributions to South Africa's post-COVID recovery. Chapter Seven concludes the report by pointing towards fruitful directions for subsequent research for scholars, policy-makers and live music practitioners.

CASE STUDY 2A: THE PRODUCTION SEGMENT ON THE MUSIC VALUE CHAIN

FRIEDERICH WILSENACH, HEAD OF AUDIO – SPLITBEAM

Friedrich Wilsenach is Head of Audio at Splitbeam – a technical production company in Johannesburg that specifically services theatres – part of an industry hardest impacted by COVID-19. Splitbeam is part of the Gearhouse Group, technical supplier to the live event industry. As well as multiple South African awards, Gearhouse was also voted Favourite International Company at an events industry worldwide gathering.

“When you work on site on a production, the day can continue till 11pm. It can be a very long day,” he says. Wilsenach worked regular office hours, with productions also happening over weekends – “But there was always something happening you know?” he adds. Work meant catering for everything from international touring productions to school shows, including clients such as the Market Theatre and the Centre for Less Good Idea.” Before COVID struck, Splitbeam’s calendar year was booked until August.

As the impact of COVID-19 hit and theatres shut down nationally in March, the company was forced to slow down operations and had to let go of many workers. Wilsenach says shows like the internationally acclaimed *Slava’s Snowshow* and William Kentridge’s *The Head and the*

Load, were among important work lost. "We had to go and take equipment out of venues that was already installed to do productions," he says.

Wilsenach was preparing to move into the company's busy season when lockdown hit. Abruptly, Wilsenach was put on 20% short time - required to come in only once a week and with only pay for that day. "I think it was a very uncertain time for everyone. We have a prediction that we won't see any real work until February or March 2021," he says.

"Once we do get back to work, how long before we will actually draw audiences to shows? And how sustainable are shows going to be? You need to have a certain amount of people in a theatre to make it financially viable. Theatres were already struggling. The arts sector was already under a lot of pressure before and it's just under more pressure right now. It's a feeling of uncertainty and sometimes a little bit hopeless, because what do you do?"

Immediately lockdown was announced, Splitbeam turned their demo room into a virtual black-box studio; a multi-purpose venue with a 3-camera system, geared to stream globally. He says this is becoming more common for technical production companies now, as it may be their only viable option for survival.

The pandemic had a huge financial impact in his life. "I think government and especially the Department of Sports, Arts and Culture has grossly neglected our sector. They've really failed us in terms of support and communication about what their plan is. I don't think they were prepared before, and certainly not prepared to deal with something like COVID," he says. "What we realized is that no promoters or producers are really prepared to put money into work now that they don't have any guarantee that they're not going to lose money," he says.

Wilsenach has begun looking for jobs unrelated to his field. He currently works online, providing technical support for meetings and webinars, which is just about keeping him afloat.

"On the plus side, I got to spend an amazing time with my son who is now 18 months old. That is my blessing in disguise. It was really what I could take from this. And getting to see him grow up and develop in a very special time of his life. I will not trade that for anything. That was incredible."

Looking ahead to post-COVID times, Wilsenach says, "I think there will be an opportunity going forward to have online platforms go hand in hand with live productions, so have both live and streaming elements, which could be an exciting thing because it broadens the scope of all productions and gives an opportunity for more people to be employed."

CASE STUDY 2B: PRODUCTION. Freddie Nyathela – South African Roadies Association

For the past three decades, Freddie Nyathela has been fervently championing the rights of youth-oriented training and transformation in music technical and production knowledge sector. In 1995, he founded the South African Roadies Association (SARA), a non-profit

organisation that encompasses training in technical, sound, lighting, stage, power, A/V, rigging, recording and production. These form the basis of job creation for, among others, technicians, engineers, backline, riggers, camera operators – basically all essential roles for production that integrate into the totality of behind the scenes work on music events and band tours.

SARA has headquarters, SARA House, in Newtown. As well as education, SARA also has an extensive international reach and offers a global skills exchange programme. Applicants come from across South Africa and other African countries. SARA's end qualification level is NQF Level 4 and many trainees go on to run their own small lighting, sound or production companies.

Nyathela, a qualified sound engineer, has worked as a roadie from the 1980s until 1992. He toured with important South African bands such as Harari. "That's how this whole idea came about of setting up this organization because there was lack of training, and no entry points for young black people who wanted to break through to the industry," he says.

Nyathela recognized the racial imbalance entrenched in the entertainment industry, "But because of the history of apartheid, especially the technical production side was only meant to be done by white people; that's one of the reasons SARA was formed: because black people were deprived of those opportunities."

"But I was fortunate because I worked with top bands like Harari, and they were the first black group to own their own technical equipment. So, I had access to their equipment; I had the opportunity to travel, we were doing our shows. Touring all over the continent. Doing it! Like I said, I'm a roadie by profession!" he says.

When the pandemic hit, the impact had a domino effect on the whole music industry. Nyathela says all work stopped for people in his field because touring was banned. "That's why you find now, the musicians and backstage people are protesting about the lack of care for the creative side," he says.

"I think we would have covered a lot of ground in terms of creating opportunities for young people ... The impact of the lockdown has been huge." There are only four staff members and there has been basic assistance from UIF, but nothing else has happened.

Looking ahead to a post-COVID world, Nyathela emphasizes the need for accessible and well-equipped training and education facilities, in contrast to the previous lack of support: "It has to be different. There must be some changes moving forward... Issues of training and education, especially for the technical and production people, because those are the people who make live events. You cannot develop the artistic side without the technical side," he says.

"It goes back to regulations, standards and guidelines. If our industry had those kind of measures and proper structures, we would have navigated this much better."

CHAPTER TWO: RESEARCH GOALS AND QUESTIONS

The research sets out to explore the impact of COVID on the live music sub-activity. The music venue, which serves as a hub for intersections and interactions between role-players from all sectors of the live music value-chain, is a focal point.

Our goals were first, to map that impact in granular detail, building on the broader CCI sectoral foundations laid by SACO in its May report (SACO, 2020 (i)). Second, employing a sense-making lens, to explore attitudes and responses to lockdowns, support and recovery among live music role-players. Finally, in looking forward to recovery, to explore the contributions live music can make to broader societal and economic resilience and recovery and rebuilding international linkages; the proactive measures live music can take in protecting the health of all involved; and the role of policy, legislation and regulation in all these.

The focus of our enquiry – with data collected via a questionnaire (Appendix A) – was thus to establish:

- The impact of the COVID pandemic and lockdowns on live music and its venues
- What the map of impact looks like
- How the impact of COVID has been experienced by different role-players along the live music value chain, with a focus on venues as the hub of interactions, and on income- and work-generation
- The support available to live music and its venues, and how effectively it has been accessed
- The factors in live music supporting resilience
- The prospects for post-COVID recovery, in terms of
 - implementing health-related logistical measures
 - utilising and monetising alternative performance platforms
 - fostering a conducive policy, legislative and regulatory climate
- The relationship between the recovery of live music and broader societal relationships, resilience and recovery

On the basis of the data, we proposed a set of practical recommendations to aid recovery, strengthen the live music sector and build resilience against future shocks, in terms of:

- A supportive policy and legislative framework
- Support for audience development
- Support for the pivot to digital
- Appropriate targeting of relief and stimulus measures
- Enhancing communication between industry and policy makers
- Maximising the impact of music on uniting communities in collective sensemaking through fostering local public life

CASE STUDY THREE: CIRCULATION/DISTRIBUTION ON THE VALUE CHAIN – MARLYN NTSELE, FOUNDER OF ISUPPORT CREATIVE BUSINESS

Marlyn Ntsele has always multi-tasked, juggling many positions. She is the founder of iSupport Creative Business - a comprehensive arts platform that handles management and promotion, bookings, marketing, youth workshops and tours. The company, founded in Durban in 2010, collaborates with many partners and artists across South Africa.

Part of Ntsele's work was as publicist and social media manager for *The Time of The Writer* literary festival in Durban. Scheduled for March 2020, exactly when the national state of disaster was announced. "So, we were literally sitting in a room with some of the writers who had just arrived in Durban, and switched on the TV and there was the president making the big announcement. The festival was supposed to start the next day," she laughs. It was cancelled. "In March, tons and tons of concerts and bookings were cancelled from our side," she says. These included artist tours and trips to Brazil and Mozambique.

However, Ntsele considers herself "blessed" because of the work the company does in social media and publicity. She explains that while this was always part of the company's activity, but has now turned into its core business: a blessing in disguise.

Unfortunately, this has also meant moving away from extensive work servicing music. In April, iSupport started work on social media work for *Sikhaba iCOVID-19* daily radio series on 15 SABC radio stations and 55 community radio stations. This has kept the company very busy. The Durban International Film Festival and Poetry Africa Festival (now both virtual) also remain among their clients.

Describing the impact of the pandemic on her work, Ntsele says she feels lucky to "have positive stories" because she had a small staff and few clients. So she has actually been able to "hire a lot of musicians to do social media and to help with management of social media pages, because they're all out of work now." She had a very difficult first two months, having to stop paying insurance and various other bills, but after that, things quickly picked up. Ntsele was also one of the few fortunate individuals who managed to access funding from the first wave released by the Department of Sports, Arts and Culture. However, she's aware she's in a minority: "Funding from the department, for instance, has always been very difficult to access. It's just that now it's exposed."

Such problems are likely to persist. "I think," says Ntsele. "COVID exposed a lot of soft spots in our society that we already knew about. The inequality has grown bigger. And from a music perspective – that is the most difficult now."

Most distressingly, COVID-19 has negatively impacted her work in rural areas. "I do concerts in rural areas normally here in KZN and obviously I can't reach those audiences. I think the lack of access in those areas to education, opportunities and to the arts is enormous, [they] get completely excluded now that certain programmes cannot physically be implemented there.

"At the same time, it would be interesting to see how the creative ecosystems in those areas have developed and new opportunities may have been created by the communities themselves. Unfortunately, development of the arts is a necessity that is very dependant on funding and digital connection, even more so during a pandemic. Both are currently lacking in those communities."

Those inequalities are very visible in music. “All these concerts happening online are working with the same sessionists and it’s the same artists being employed by different bands. But the *maskandi* artist from Stanger that normally plays wherever with [a backing track] is still not getting any work – and will not be getting any work.” iSupport is also currently recording virtual concerts that are being broadcast in collaboration with the Jazz Centre at UKZN. These biweekly events began on the first day of lockdown and are continuing. In addition, with support from Concerts SA, iSupport has reunited with some previous venue partners such as the Albert Luthuli Museum to broadcast pre-recorded concerts at The Playhouse. To ensure township communities are not excluded from virtual screenings, the organisation uses Luthuli Museum in Groutville to screen the same concerts for small, safely distanced groups of community members.

Looking ahead she says, “I think this has given South Africa a huge opportunity to catch up with the rest of the world and turn their festivals and events and concerts into hybrid concerts maybe now forever. Because all of a sudden, a lot of South African arts and culture can be accessed online by audiences abroad, which is a huge positive development. It also forces artist to upskill themselves,” she says.

“There’s a rehearsal space in Durban that has turned their whole rehearsal space into a live Facebook streaming space, where any artist can just come in and pay the same fee as a rehearsal fee, and go live with it on Facebook. Those are very interesting and encouraging business models.” But, she reflects, such business models will still need to be supported.

CHAPTER THREE: LITERATURE ON COVID AND LIVE MUSIC

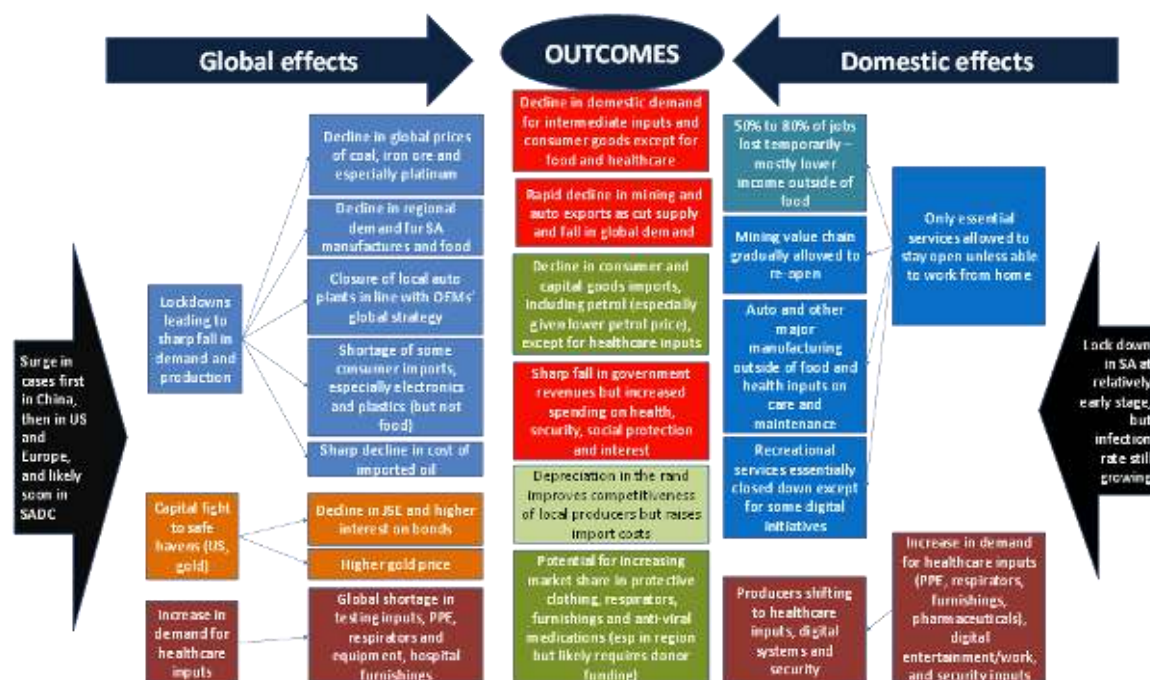
NOTE: The aim of this chapter is not to duplicate the detailed survey of scholarly economics literature conducted by the South African Cultural Observatory in May 2020. Rather, it aims to survey grounded music industry information, discussing predominantly recent reports and investigations – including those from media and business sources – undertaken from a practitioner perspective.

3.1. Context: the impact of COVID on the South African economy

The most recently-published South African report assessing the impact of the pandemic on the country (UNDP, 2020)^{ix} estimates a 40% income loss across South African households, with the impact falling disproportionately on Black households, and households containing large families, with female-headed households the most vulnerable. Alongside a decline in both domestic demand and domestic supply, UNDP predicts a steep rise in inequality, with South Africa's already high Gini Coefficient rising from 0.16 to 0.23. The sectors experiencing the most severe losses include apparel, accommodation and tourism, and all industries involved in the manufacture, distribution and sale of alcohol. Job losses are estimated at between 47 000 and 80 000, with the informal sector, estimated by the Statistics South Africa Q2 2019 Quarterly Labour Force Survey to provide just under 20% of total employment possibly the hardest hit of all. Economic recovery, suggests UNDP, may take five years or more.

The July 2020 TIPS Policy Brief *Towards a Recovery Programme* similarly tracks a sharp fall in household incomes alongside the closure of many SMMEs. In 2020/21, TIPS projects a reduction in municipal incomes of around 30% "which will make it harder to maintain and extend infrastructure", particularly combined with the constraints COVID spending and revenue shortfalls will impose on national spending programmes. The figure below provides a high level summary of the expected impacts.

Figure 1: Global/domestic COVID impacts. Source: WTO/TIPS



3.2. Situating live music and its venues in the COVID-impacted economy

For the CCIs overall, SACO estimated in May that the shutdown could be expected to reduce South African GDP by R99.7Bn. 95% of respondents had experienced cancellations, and only 12% of those whose CCI activities entailed face-to-face operations would be able to continue with a viable quantity of operations. Chapter Five below details the precise impact on live music as yielded by our survey data; the trends are broadly similar but, because of the nature of the industry, intensified in many respects. Even these broad outlines of impact above have immediately apparent results for live music, across four dimensions: the sources of income for live music, and its reliance on an environment supportive of hospitality, mobility and sociality. The impacts are direct (cancelled work), indirect (impact on linked industries such as service providers and corporate sponsors), and induced.

"I work often through other musicians who require a backing group so my role is often secondary and therefore difficult to provide formal 'contracts' 'cause there aren't any. [But] I played with four bands this way so my income losses are substantial..." – Research respondent

3.2.1. Sources of income or support.

Loss of household income means loss of consumers' disposable income, not only for spending on performance, as in more affluent households, but for spending on nonessential data use, which impacts lower income households more severely, ruling out activities such as accessing music live streams. The OECD Economic Survey (2020) observes that 32% of South Africans have below 60% of median disposable income. Diminution of the apparel, travel, tourism and alcohol industries reduces sectors (fashion, airlines, hospitality, liquor brands) historically important for the

sponsorship of music events, artists and venues, including hosting, promotion, and travel logistics.

To this list we may add the media industry – central to the success of live music – where many small media houses unable to access emergency funding had already closed down by June, followed by announcements of Section 189 of the Labor Relations Act, processes (retrenchments) in several of the largest, including the national broadcaster SABC, Media24 and Primedia. Historically, media have not only provided sponsorship for music events but, through coverage, added value in the industry value chain and drew patrons to venues. Higher education institutions have also historically sponsored, subsidised or made infrastructure available to music events as venues. Cuts to university block grants and reprioritisation of university budgets totalling an estimated R3.8Bn^x will inevitably entail reductions in the often discretionary finance to continue such support.

Live music workers in all capacities are predominantly small independent businesses or freelancers with no or very limited alternative sources of income. Those entities and individuals that are taxpayers contribute to the fiscus; those that are employers assist others to do the same. If that is no longer possible, revenue, industry expertise and employment are all lost. The losses of sponsorships and support described above have particularly long-term impacts in an industry that largely operates project to project: whatever kind of ‘normality’ returns, projects planned pre-COVID could well not return with it; the finance and possibly audiences may no longer be there.

3.2.2. Hospitality and live music.

Restrictions on the sale of alcohol, curfews, and restrictions on the numbers of patrons permitted in bars and restaurants have already caused the closure of many businesses formerly providing venues for music. For those that remain open, the costs of ensuring compliance and the reduced income from smaller patron numbers make hosting live music events a less viable proposition. Many role-players report selling off equipment to raise COVID crisis finance. Only around a third of South African music venues could previously offer well equipped music stages; with higher costs and reduced finance for hiring, fewer will now be able to host live music. Additionally, hiring equipment provided significant revenue and employment to events businesses; a 2013 survey (SAMRO/CSA, 2013) noted that just over 40% of venues in Cape Town and 50% in Johannesburg hired music and stage equipment, while 50% in both cities hired crew to run it.

“ I host music and arts events partnered with a local tavern, and make revenue from door ticket sales, food and drinks,(...) merchandise, and I often get booked to perform for R500 a 15-minute set” – Research respondent

In venues which also serve as bars and restaurants (a model dominant in South Africa), the sale of commodities such as alcohol and tobacco, which can bear relatively high mark-ups (see, e.g. Kane, 2017)^{xi}, contributes to the financial resources available for marketing and staging live music. Restrictions on the sale of these commodities thus erode the ability of a venue to support live music.

The added economic burden of electricity load-shedding noted by the OECD (2020) is also relevant here. All venues require power for lighting, sound amplification, catering and hygiene maintenance. A generator is a possibly unaffordable added cost; without one, uncertainty about power supply is another disincentive to both venues staging and audiences planning to attend an event (see eg Jacobs, 2015)^{xii}.

3.2.3. Mobility and live music.

In Neil's 2019 study for UNESCO^{xiii} of artists' working conditions, he noted: "The need to integrate the mobility of artists and cultural professionals into national and regional cultural programmes is becoming increasingly apparent (UNESCO 2019 p 55). Audiences, performers and equipment all require transport to a live music venue. For major events such as the National Arts Festival in Makhanda and the Cape Town International Jazz Festival, a significant proportion of attendees are inter-provincial and international tourists (see eg on the CTIJF, Saayman & Rossouw, 2010)^{xiv} Such events generate revenue and employment and, in the case of Cape Town, mitigate the seasonality of tourism and tourism-related employment within and outside music. National and international travel restrictions under various stages of lockdown, and the subsequent collapse of local and some international transport operators, including major airlines^{xv}, mean such inflows and their associated revenues may be very difficult to restore, even when restrictions are eased (UNWTO 2020)^{xvi}. Restrictions on travel also impact on access to education, exchange opportunities, professional networking and exposing local talent to international scouts and booking professionals, impacting on future work prospects for artists and the profile of the venues that host them.

3.2.4. Sociality and live music.

As a European study^{xvii} (European Commission, 2020; p.4) notes: "One main condition for the sustainability of most cultural and creative sectors has been almost entirely disrupted: the possibility to have a public presence as a source of revenue to meet operating costs."

This and the weakening of the transport sector have far broader implications than loss of revenue for music alone. The past three decades have seen the steady worldwide growth of the 'experience' economy (see, eg Pine & Gilmore 1998^{xviii}) in which the venues where live music happens play a key role. This is one reason why revenuebased analyses, while relevant and important, are no longer sufficient on their own (PWC 2015)^{xix} There are multiple more informal income flows around live music venues, including trade in other goods leveraged off performance, for example, T-shirts. "Aesthetics, sociality... the broadening of experience and entertainment are sources of value for both consumers and businesses" (CSA 2016)^{xx} The continued growth of the leisure economy as a source of revenue, as management consultancy Executive Insights^{xxi} points out, rests on, among other factors, this value placed on experience, as supported by pre-COVID advances in transportation networks and technology. Both have been diminished by the pandemic, raising questions about how sustainable the continued growth of the entire leisure economy will remain.

3.3. Related survey findings on impact

"...even as we rely on culture to get us through this crisis, culture is also suffering. Many artists and creators, especially those that work in the informal or gig economy, are now unable to make ends meet, much less produce new works of art. Cultural institutions, both large and small, are losing millions in revenue with each passing day. As the world works to address the immediate

danger of COVID-19, we also need to put in place measures to support artists and access to culture, both in the short and long-term.” Ernesto Ottone, UNESCO Assistant DirectorGeneral for Culture^{xxii}

By mid-2020, arts organisations (and in some cases governments) across both the developed and developing world had begun assessing the impact of COVID on the CCI sector. For music specifically, the International Music Council (IMC) has at time of writing listed surveys undertaken in Africa, Asia, the Americas, the Pacific region and the Middle East as well as in European countries and the USA¹.

All have reached very similar conclusions: the impact is devastating and unless appropriate policy measures are implemented the damage may be irreparable. The World Economic Forum^{xxiii} estimates that a six-month shutdown will cost \$10Bn in music-related sponsorships alone for a global industry worth over \$50Bn, of which the live performance sector accounts for half. Surveying the USA, Florida & Seman (2020)^{xxiv} calculate the loss of 2.7 million jobs (nearly a third of total employment) and US\$15Bn in sales of creative goods and services (nearly a quarter). Similar to the SACO May 2020 findings, these scholars conclude that the creative economy, and within it the performing arts – for America, particularly in metropolitan areas – are likely to be the hardest hit.

Such COVID-focused studies do not fully map the impact of this damage outside music itself. However, multiple earlier studies focused on building urban music economies (for example, City of Vancouver 2018^{xxv}) have traced how music staged in venues creates jobs, increases local revenues, attracts visitors and can regenerate infrastructure and support social integration – all potential engines of employment.

All current COVID impact studies rely on available data: on activities and role-players already mapped or registered in various ways, via official institutions and regulation, or through professional bodies. But the European Commission notes that this kind of survey data alone is likely to underestimate impacts, because “much cultural work remains in many ways invisible: the life of a few known institutions or companies depends in fact on the contribution of many workers who stand ‘off the radar’.” (European Commission 2020 p8) Thus, for example, a musical show may employ costumiers, use transport, require catering for rehearsals and more. A 2010 survey^{xxvi} found that more than 50% of musicians surveyed purchased goods and close to 100% outsourced services directly related to their music work to other local companies, both within the creative and cultural industries sector and outside it; they provided employment “to workers in categories as varied as drivers, costume-makers and caterers.” Additionally, more than half of the respondents in that research reported conducting formal or informal training-related activities, often requiring the purchase of educational goods (stationery) and, again, services.







3.3.1. Research on impacts in Africa

For the African continent, the *Music In Africa Report*^{xxvii}, considered only the first two months of lockdown in its early research. Nevertheless, it found that 28.2% of musicrelated companies had already experienced losses equivalent to between \$10K

¹ Many of these are not available in English translation; this summary is limited to available Anglophone texts

– \$50K, while among music-employed individuals 54% had already experienced losses of between \$1K-10K. This was not simply a case of newcomers with no established reputation: 44% of the musicians surveyed had between 11-35 years of experience in the business. Of those individuals, 64% – and 70% of music-related companies – had no alternative sources of income.

Comparison table of COVID-19 economic impact surveys in Africa

						
REGIONAL ECONOMIC COMMUNITIES	Economic Community of West African States	Economic Community of Central African States	East African Community	Southern Africa Development Community		
	<p>Member states: 15 Creation: 1975 Total population: 239,630,000 GDP(2019): 715,733,068,000 USD</p>	<p>Member states: 11 Creation: 1983 Total population: 137,000,000 GDP: 300,366,030,000 USD</p>	<p>Member states: 9 Creation: 2000 Total population: 177,000,000 GDP: 193,700,300,000 USD</p>	<p>Member states: 16 Creation: 1982 Total population: 545,000,000 GDP (2019): 721,300,000,000 USD</p>		
Featured countries	Senegal	D.R. Congo*	Kenya*	Uganda	Namibia*	South Africa*
	GDP: 23,579,000,300 USD	GDP: 47,316,820,330 USD	GDP: 93,663,000,000 USD	GDP: 34,387,000,300 USD	GDP: 12,890,000,000 USD	GDP: 351,431,600,200 USD
Title and author:	Culture et COVID-19 : nouvelles solutions ?, April 2020 (Association des Valeurs de la Musique du Sénégal)	La créativité au cœur de la diversité: Impact économique de la COVID-19 sur le secteur culturel et créatif en République démocratique du Congo, June 2020 (Prof. Rikio Kozek)	COVID-19 resilience: creative industry options and strategies, April 2020 (Heva Fund)	COVID-19 and its impact on Uganda's creative industry, April 2020 (KO-Huz Africa)	The Creative Industry Health Economic Impact Survey, May 2020 (Creative Industry Guide)	Measuring the impact of the COVID-19 crisis on the cultural and creative industries in South Africa: An early assessment, May 2020 (South Africa Cultural Observatory)
1. Respondents	923	101	510	700	130	580
2. Loss (turnover) 2 nd quarter 2020:	8,000,000 USD	27,411,760 USD	3,559,861,70 USD	134,560,15 USD	11,595,876,64 USD	1,495,632,289,27 USD
3. Informal sector rate:	53,5%	-	30%	-	25%	35%
4. Employment:	-	5,433 jobs affected	Majority of firms (59%) have lost their employees (10 per cent max.)	-	61,7% of respondents are freelancers	99% of employers intend to terminate short-term contracts and informal jobs; 25,5% to reduce wages; 7% to retrain permanent jobs
5. Proposed recovery Plan/Possible solutions:	Emergency fund – Support fund for cultural enterprises – Stimulus fund	PMRCO-19: Funding Investment (database, creative clusters, Doing Business, human capital)	COVID-19 Crisis Strategy Matrix: – Emergency Resilience and Transformation phases (ICT, e-trading, clustering financial and technical assistance)	New business models in relation with digital platform	Representative of creative sector to be involved in Task Team finding long-term solutions	Medium-term sector support and subsidies beyond 2023 – long-term careful strategic planning and assistance for adjusting business models

7Head of state African Union co-chairman of anti-piracy and heritage

Sources:

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- * <https://www.unep.org/fr/news-and-stories/detail/unep-does-backdoor>
- * <http://www.dominicanrepublic.net/press-releases/2020/06/06/KR18-CIP/>

is 5A (table continued). *Act. 100m* (Hesselt) *Homalodactylus* (Cuv.) *Act. 100m* (Hesselt)

Figure 2: Economic impact surveys in Africa. Source: Ribio (2020)

Ribio's survey of early research findings across Africa (Ribio 2020^{xxviii}), noted varying monetary impacts, reflecting the mapped size of the creative and cultural sectors in different African nations. His work considered Senegal, the Lusophone countries, Namibia, Ghana, Kenya, Uganda, DRC and South Africa.

South Africa's estimated losses were the largest. This is not surprising. The UNESCO taxonomy of stages of development of the global music industry places South Africa as one of a minority of African nations possessing an established music industry with a fully developed value-chain.

Ribio also summarised the vulnerability of African CCIs, as follows:

- The dominance of the informal sector across the continent. Ribio notes that South Africa is the exception here, with only 35% of informal activity recorded for South African CCIs.
- The inability of freelance workers to withstand economic shocks and the prevalence of part-time working and short-term contracts across the sector, which limits access to finance, equity, managerial expertise and information
- The small size of even formal businesses
- The need for high levels of face-to-face interaction in cultural and creative work

Not all cultural and creative segments, however, share these vulnerabilities equally. Performance-based activities in general have a far stronger dependence on face-to-face working; activities such as design are conducted without an audience. Where there are strong public theatre structures; actors and other workers in those structures have formal employment, albeit the pandemic still puts their livelihoods at risk. Little of the research so far has explored these differences by considering individual arts sectors.

Ribio noted that qualitative research in some of these countries reflected high levels of hope in digital platforms as a pivoting strategy, at least for sustaining relationships with audiences. He noted, however, that monetisation of such platforms still posed challenges. This was supported by the findings of *Digital Futures?*^{xxxix} a July 2020 Concerts SA study of live streaming platforms in South Africa, which found that short term earnings from live streaming often brought performers a third or less of the revenue they could expect from a live show; with potential long-tail earnings still largely unrealised and appropriate marketing strategies only in early development. Our research, however, reflected similar high levels of hope in the future potential of live streaming, with a majority of respondents planning or already actively engaging with digital platforms and physical venues attempting to pivot to a digital presence.

Kenyan arts organisation HEVA^{xxx}, analysed the socio-economic impacts of the pandemic and how those were likely to impact on artists. As well as all the impacts on movement, travel and gatherings, and the availability of official funding already noted above, they added the disruption of international supply chains, which impacted on access to physical cultural goods such as instruments and sound equipment. A rise in the use of contactless technology (for example for the purchase of goods or tickets) increased the exclusion of those without bank accounts or devices. More broadly, HEVA warned about the potential dangers of restricting free creative expression inherent in disease prevention-related surveillance and control, and a possible increase in social tensions and conflicts caused by confinement and fear.

3.4. Support and relief mechanisms

Note: Current literature on policies conducive to post-COVID live music recovery is considered in the context of the recommendations in Chapter Six below.

SACO (2020) and other research bodies have already conducted detailed surveys of available relief mechanisms, reflecting the situation relatively early in the pandemic. A useful updated summary is to be found in the Australian BYP Group June newsletter

(Bailey,2020)^{xxxix} This finds that 54 countries worldwide have created COVID relief packages. Of these, 19 offer 'normal' social insurance support, conflating arts workers with all other impacted workers. 35 countries, including South Africa offer support specifically targeted at creative and related sectors, with six of these – again, including South Africa – broadening the offer to other sectors, specifically (as in South Africa) sport. The five largest arts relief budgets are listed as provided by Austria (\$2Bn), Poland, Japan, the Netherlands and the USA. Since that update was published, Germany has announced an arts relief package of just under \$1.2Bn, displacing the USA (\$300M) from the top five list.

Bailey lists five main categories of support:

- Cash grants
- Support for self-employed and freelance workers
- Direct support without paperwork
- Various financial and practical digital support programmes
- Support for public access to the arts

The Culture 21 United Cities and Local Government (UCLG) Committee (2020) in its survey^{xxxix} of eight 'culture cities' and their relief measures, provides concrete examples of relief in both cash and kind, including the extension or initiation of universal basic income grants, placing books in COVID relief packages (Montevideo), and developing library programmes that create both work and work-spaces for local artists. The European Commission (2020) describes a range of both financial and non-financial policy relief measures. On the financial side, these include income support and tax and VAT-relief, but also the continued payment of already-allocated grants to arts spaces despite closures or cancellations. Non-financial support includes the provision of advisory and information services, and the enhancement of municipal support for digitally-based and other safe event options. Finally, the Music in Africa (2020) survey adds to all the types of relief noted above, Nigeria's creation of paid commissions to create work, specifically targeted at music workers.

South Africa's financial COVID support is available to CCI workers through multiple mechanisms: as well as the specific Department of Sports, Arts and Culture relief, funds for unemployment relief are also available via the Department of Labour for contributing employees, and through other ministries for small businesses and for tourism-related activities, where arts workers and arts enterprises take their place in much larger categories of applicants. All require extensive documentary proof of status, bookings, cancellations and losses discussed in relation to our survey findings from

Chapter Five onwards. However, the OECD(2020) Economic Survey notes more generally that South Africa ranks high among nations in terms of the burden of regulatory requirements it imposes, and that this has the potential to impact negatively on post-COVID recovery.

Taken together, the research reveals much valuable data about the impact of COVID on the CCIs, even at this relatively early stage in the progress of both pandemic and tentative recovery. South African research to date places policy-makers in a strong position to evaluate the general situation. However, many research gaps are apparent. Much extant research considers cultural and creative activities in their totality, where we know that impact varies between different activities with different characteristics.

There is hardly any granular information available about the impact on individual working practices along the live music value-chain.

Because of the urgency of the need for impact studies, samples have predominantly been based on information derived from existing structures and records, when we know anecdotally that much arts-related work is informal, unregistered and often located outside the better-connected and mapped urban sectors, and that limited information – especially in Africa – is available about emerging trends, such as the use of digital performance platforms.

Finally, much research has been exclusively quantitative. That is necessary for comparisons and policy-related spending decisions, but yields limited understanding of motivations and behaviour among CCI role-players – including around, for example, the take-up and utilisation of available relief – which could assist in targeting future policies more effectively.

CASE STUDY 4: A DELIVERY MECHANISM ON THE MUSIC VALUE CHAIN.

IAIN HARRIS – COFFEEBEANS ROUTES; CULTURAL TOURISM OPERATOR

“Devastating”, is how Iain Harris, founder of Coffeebeans Routes, describes the effect of COVID-19 on his business. As a tourism agency Coffeebeans focuses on creating experiences around stories in the arts sector. This included visiting musicians from genres ranging from jazz to choral and classical in their homes, for concerts and conversations. Coffeebeans is FairTrade certified and has received several national and international awards including a WTM Responsible Tourism Award Africa for 2020.

“Music has been the backbone of what we do since the beginning,” Harris says. Music aside, Coffeebeans’ tours also included artist studio visits, short film experiences, working with cooks, farmers, town planners and more. The company had just expanded their reach to Kigali and Nairobi before COVID-19 hit. “When the first death was announced in South Africa in early March, we could immediately see the impact. The following day the cancellations started to come through. Whatever work we had that was either paid or about to be paid, was very quickly cancelled.”

Coffeebeans was forced to stop operations early in March.

What had been set to be a very promising and busy Winter season instead became an intense, stress-ridden time. “We had to act extremely fast and start putting people on half time, and terminate agreements and contracts because we could just see there was going to be no income for the foreseeable future,” he says. Work and the associated revenue was lost across the board. Between Johannesburg and Cape Town alone, Harris worked with 80 suppliers (musicians, cooks, urban farmers), all of whose contracts had to be terminated. “It’s likely to be until sometime next year before we can start to open up again,” he says.

Financially, Harris was hard-hit and had to access credit facilities to stay afloat. “I was fortunate to pick up some good consulting work within tourism at first for two months, but a lot of that money had to pay for outstanding bills.” He began applying for jobs outside the tourism sector, later taking up freelance writing, and is currently working in the education sector. “I really had to pivot,” he says, adding that “it’s still anxiety-ridden”.

Looking ahead to music post-pandemic, Harris says, "I've been really intrigued to see how the shift to streamed concerts is happening. I really enjoyed being able to watch live music from home. There was a level of access I just never had before." He foresees a hybrid future, where venues will start to live-stream in addition to having live performances with a different revenue source.

While not operating, in the interim Coffeebeans has been busy developing online experiences that move elements of physical touring experiences online. Aside from experiencing technical barriers, the work has allowed him to work once more with content including music. "That's coming on slowly but surely", he says, and adds, "I think we've all realized our biggest asset is the community around us. We have to spend time engaging and building communities. Work collectively and work in smart ways."

CHAPTER FOUR: METHODOLOGY

As the preceding review of literature has demonstrated, extensive work has already been conducted – and is still ongoing – on the impact of COVID on the CCIs, internationally and on the African continent. This research situates itself to fill the information and understanding gap around one national sub-segment of the CCIs: live music performance in South Africa. It employs a grounded theory, mixed-methods approach to provide both quantitative and qualitative data about live music, including granular information about impact on the working practices of individual music workers at each segment of the live music value chain, drawing on practice-oriented literature. These methodological choices and the instruments and processes supporting them are discussed briefly below.

4.1. Why live music and venues?

The UNESCO Cultural Activity Performance and Celebration (UNESCO 2009)^{xxxiii}, within which live music is situated, includes music alongside “Performing arts...festivals, fairs and feasts”. The UNESCO domains have extremely robust utility for producing internationally comparable data. However, in the absence of more granular studies, the aggregated UNESCO domains can also have the effect of masking specific impacts where these differ for a specific activity. Responses from formally employed theatre personnel, as one example, might outnumber in a survey the preponderance of freelancers in music and thus skew conclusions about employment, particularly since those in formal employment are easier to identify and survey. Not all ‘festivals’ are music festivals; some relate to films, interior decoration or wellness. Thus findings from individual cultural and creative activities are important to nuance broader categories.

The UNESCO ‘music’ category is elaborated as “music in its entirety regardless of format...live and recorded musical performance, music composition, music recordings, digital music including music downloads and uploads and musical instruments.” (p.26) Again, this can have a similar masking effect because, in terms of the COVID-related vulnerabilities noted earlier, it is very clear that the impact of restrictions on mobility, hospitality and sociality impact differently on each of the ‘musics’ listed by UNESCO. Composition and instrument manufacture can be conducted independently and even in isolation. Digital and recorded music rely on complex revenue streams; live music on a simple ticket purchase at the gate. Uploading music can be a voluntary and unremunerated activity; so can downloading – but they usually are not. There are a myriad such differentiations between elements of UNESCO’s ‘music’ category, and each element merits its own specialised research.

But it is live music that has been most severely impacted by the restrictions, and while a pivot to digital platforms is underway, that still has limited applicability in certain contexts, such as club music created specifically for communal dancing (see, for example, Bakare 2020)^{xxxiv}. So it becomes a priority to drill down into live music to map the extent of all impacts, and discover what targeted interventions may be most effective. Live music, as noted earlier, was rapidly establishing its status as the highest-value product in the cyclical music value-chain before COVID interrupted its growth. Venues of performance serve as hubs for production, circulation, distribution

and delivery, as illustrated below in the value-chain this research employs as its model. Thus live music and its venues are both integral to the music sub-segment, and can illuminate the reach of impacts through their inter-linkages and additional implied horizontal connections (with the eventing industry, the hospitality and tourism industries, the liquor industry and more).

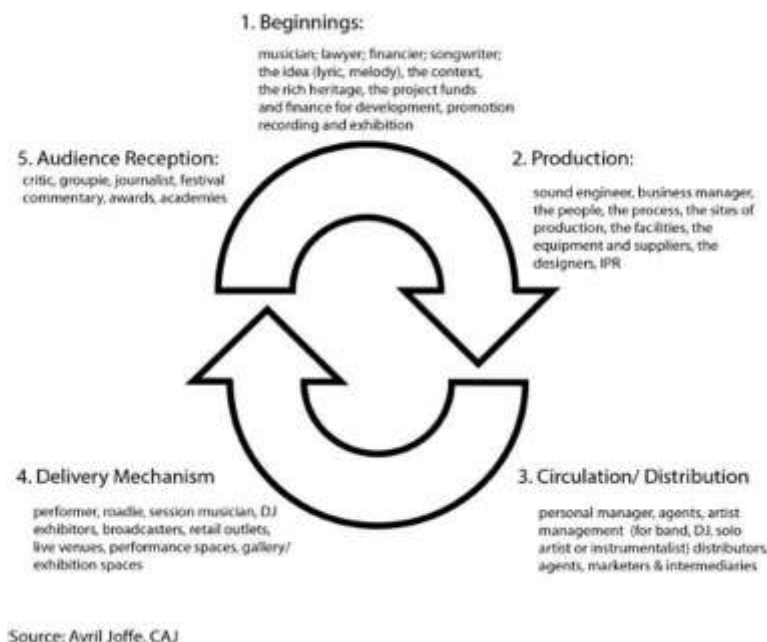


Figure 3: Music industry value chain. Source, Joffe, CAJ

4.2. Definitions and categories

“Live Music”. Our definition of live music is genre-neutral. We include classical music, religious music, traditional music, popular music, electronic dance music and more; we consider once-off events, regular music employment and freelance, intermittent employment – any music performance activity, in fact, from which a musician has the potential to earn a living, at whatever scale.

“My bread and butter activity is recording choirs and *isicathimiya* groups who travel from as far as Limpopo and Gauteng to Mbizana in Transkei and Nongoma in Northern KZN. They were under travel restriction and the entire fraternity is at home wearing a mask. They closed down all public performance gatherings since February 2020. Who can pay my rental arrears? What about my landlord?” – Research respondent

“Venue”. Much earlier South African research on venues has followed the practice of highly developed nations in setting qualifying benchmarks around formality, permanence and level of equipment for a venue. However, that is not the situation of all South African venues. Many, especially if located outside metropolitan centres, have their primary identity as something else (for example, a bar or restaurant) and host music on an occasional or project basis, needing to hire-in resources for that purpose. Excluding such places would render important information invisible, a limitation highlighted by the ConcertsSA 2013 report, *Song Lines* (CSA, 2013 p 22)^{xxxv}.

Additionally, in the current situation it has exclusionary implications for eligibility for relief.

Because of the levels of interdependency between venues and performers, as well as other role-players, we have adopted the terminology “live music and its venues” to reflect how strongly research responses underlined these relationships.

4.3. Why mixed methods?

As early as 2008, UNCTAD noted that “The great value of [conventional economic] accounts is that they present data...directly comparable with other sectors...[But] this is also a weakness since it assumes that the creative economy is precisely the same as the rest of the economy.”^{xxxvi} Thus while information about quantitative impact is vital, presented alone it risks stimulating a knock-on effect on both policy and grantseeking behaviour. It may foreground exclusively cash or infrastructure spendingbased solutions. As a result, discussion of other potentially supportive but more innovative interventions (such as, in the case of music, capacitation in live streaming skills) may be side-lined.

It has already been noted that much activity in the creative economy is short-term, project-based and fluid in organisation; this is especially marked in live music and is once more underlined by the findings of this survey as discussed from Chapter Five onwards. Additionally, much activity in music relates to the affective activity and to sense-making (see eg Weick, Sutcliffe & Obstfeld 2005)^{xxxvii} in the behaviour of both practitioners and audiences.

Similar dilemmas have been encountered in the health sciences, where ‘hard’ research data are vital, but where, alone, they may offer only partial tools for analysing practitioner and patient behaviour, and where understanding is enhanced by utilising qualitative descriptions elicited from role-players (see Chafe, 2017)^{xxxviii} That is the framework this research adopts. It has developed instruments to elicit both quantitative data and thick description from live music role-players: granular contextual detail and explanations of actions and attitudes that can contribute to analysing their social meaning.

4.4. Questionnaire design and distribution; case studies

The questionnaire was designed based on the items and format employed by SACO in conducting its May 2020 impact study, and electronically distributed via online survey tool Survey Monkey.

In order to elicit additional qualitative data, open categories – “Other, please tell us more” – were added to relevant quantitative items. Further affective (“How do you feel about...?”) and sense-making (“Why do you think this happened?”) items were added. Through a process of brainstorming with music industry colleagues via ConcertsSA and the SAMRO Foundation, the now significantly longer questionnaire was refined, with the goal of a completion time of not more than 20 minutes; pre-testing suggested completion took an average 18 minutes; data extracted from the Survey Monkey responses indicate average time spent on the survey was 5 minutes 20 seconds. At this stage, duplications, ambiguities and other wording issues were corrected. The

questionnaire was submitted to SACO for approval and further pre-testing, before posting online. Through SACO's circulation list, plus the professional networks and mailing lists of a number of music industry organisations, including the researchers, IKS Cultural Consulting, SAMRO, the SAMRO Foundation, Concerts SA and RISA, a total of 687 responses was received by the closing date, with a further nine respondents opening and submitting the questionnaire, but declining to provide responses. The text of the final questionnaire is included as Appendix A.

Under normal circumstances, the online questionnaire would be supplemented by face-to-face interviews with a selected sample of respondents and collective focusgroup activities. Given the limitations on face-to-face and group interactions prevailing for most of the research period, a sample of role-players from the various stages of the industry value-chain were instead interviewed by telephone or Zoom to provide a series of short cases, focusing specifically on experiential and attitudinal aspects of the main survey via a narrative enquiry approach. These are presented in subsequent chapters to provide snapshots of the impact of COVID on individual working lives, the texture of role-players' experiences and their sense-making about these. The case interviewer did not have any information about research responses, to preclude any possibility of confirmation bias during the case interviews.

This research has the aim of supporting policy practitioners as well as extending mapping of the live music sector. So, together with the open responses gleaned from the survey and quoted in this document, the case material serves to enhance readers' understanding of how live music practitioners actually operate, and particularly to extending understanding of "impact", which cannot be reduced to quantifiable "jobs" in a precarious, project-based industry where it is "work" rather than "jobs" that most often determines revenue. The interview guide is also included in Appendix A.

4.5. Use of media, business and practitioner literature

The researchers at IKS Cultural Consulting, have been collecting references on the impact of the pandemic on live music since March 2020, to support the full range of their professional activities; their associates, Concerts SA and SAMRO, already have live music policy literature collections related to previous research and publication, and these were augmented for this research project by a desk literature search to identify more recent documents. This research draws predominantly on what is sometimes referred to as 'grey' literature: non-peer-reviewed professional, practitioner, consultant and media reports about the impact of COVID on live music.

A thorough survey of the relevant scholarly economics literature was already conducted by SACO, and is available in their May 2020 report. There are however additional and compelling reasons for employing information derived from practitioner sources. First, our research orientation is towards practitioners and policy-makers, not the academy. Second, the COVID pandemic is still relatively young; scholarly work is in progress, but, absent pre-prints, it can take months (and sometimes years) for peer review and journal publication, whereas our research was commissioned for completion within a 10-week period. Third, in a rapidly developing situation, media reports present the most current information about pandemic-related developments in live music. Again, parallel dilemmas are encountered in the health sciences (see Paez, 2017)^{xxxix}. Although not peer-reviewed, the literature selected has been produced by

reliable, acknowledged industry and international cultural organisations and researchers and established mainstream media.

4.6. Data analysis

Because of their function, each entity in value-chain segments 2,3 and 5 above (and many of those in segment 4) serves multiple performers, and as a consequence the number of performers in the live music industry is far greater than the numbers of roleplayers in these other categories, including venues. This structural imbalance was reflected in the numbers of respondents to the survey. However, again because each serves multiple performers, the loss of, for example, one venue or an entity servicing venues from the industry can have a far greater impact than the – albeit tragic – departure of a single performer from the music profession. (This is also true of some individual musicians, who may call several others together to work as a full ensemble for a specific engagement.)

For these reasons, we opted to analyse the survey dataset both in its totality, and split into “performers”/ “non-performers” categories for some aspects of the Chapter Five analysis. Quantitative data analysis was triangulated with the results of manual thematic coding of the open answers submitted, to “capture a more complete, holistic, and contextual portrayal of the unit(s) under study.” (Jick, 1979)^{xl}.

4.7. Ethical considerations in the research process

The research was anonymous and voluntary, in terms of both participation and decisions about which questions to answer and how to answer them. The questionnaire began with an initial question requiring participants to explicitly opt in, as required in terms of POPI. The questionnaire also indicated the uses to which the information supplied would be put. The script for the case interviews provided similar options and information to interviewees, including the provision that an interviewee could withdraw at any time, and could specify if they wished any information shared in the course of the conversation to remain ‘off the record’. The information provided has been maintained securely by SACO/NMU and IKS Cultural Consulting, with access only available to the researchers, and will be held only for as long as research-related purposes require.

4.8. Research limitations

As noted, conducting this study under the conditions of the COVID pandemic, and with urgent deadlines because of the need for timely information, constrained it in various ways. These included

- Because the pandemic is only six months old, and health experts predict that the virus and its impacts are likely to continue in various forms until – and probably after – the development of an effective, accessible vaccine, these remain interim findings.
- There was lack of time to prepare, pilot and disseminate questionnaires in official South African languages other than English
- Restrictions on gatherings prevailed during the research period preventing large face-to-face focus group meetings as part of the qualitative component.

It is also important to note, however, that despite the reasonably high level of respondents consenting to the survey, completion rates for individual questions were significantly lower, averaging around 50% across most questions, and in some cases, specifically questions related to turnover and employment, as low as 17%. Further, in using only electronic means to circulate the survey, live music industry stakeholders without access to the internet were excluded.

A significant number of artists, representing 53,5% of the total sample, responded. Given the concerns about sample bias, the data was analysed in two groups: artists and other role players. Where there were differences in the responses, these were extracted and documented separately in Chapter Five.

Additionally, other constraints on South African live music research long predate this study, especially

- the historic lack of mapping and demographic information on entities and individuals along the live music value chain, particularly outside the metropolitan centres of Johannesburg, Cape Town and Durban.
- A lack of significant female representation, particularly among artists. This has previously been noted in academic studies and merits much more intensive scrutiny. Over 83,8% of respondents were male, resulting in a gender-biased view of the live music sector.

Because of its short timeframe, the research was unable to survey trends in actual artist and venue revenue realised from the widely touted live streaming strategy. A small-sample Concerts SA snapshot study^{xli} suggests these are currently small. A longitudinal survey could map this aspect more comprehensively.

Finally, it is regrettable that the same timeframe precluded translating the questionnaire and making it available in languages other than English, and that pandemic conditions precluded holding live focus group discussions in other official languages. Exclusion may occur whenever English is the sole language of research, and this may, once more, impact on non-metropolitan and traditional musicians who form an important part of informal music circuit activities, but whose working lives feature hardly at all in the research. We acknowledge this, and hope to redress it in future research projects under more conducive circumstances.

CASE STUDY FIVE: A DELIVERY MECHANISM ON THE MUSIC INDUSTRY VALUE CHAIN. BRADLEY WILLIAMS – VENUE OWNER

Bradley Williams is the owner and manager of multi-disciplinary space, Artist in Braamfontein, which he runs with his partner Kenneth "DJ Kenzhero" Nzama. The pair have run the space for three years during which it has evolved into an art gallery, meeting space and hub for a pan-African creative community. Linked to the space is a live performance venue, Untitled Basement, which features multiple arts and music genres.

Williams says that, moving into their third year in February 2020, they were coming off a financially tough 2019, experiencing recession-like challenges. "We were working on increasing our output. We had planned a lot more productions and were really going to go aggressive."

"We had probably our best-ever curated music programme planned for between March and June. We were going to see big collaborations that had been in the works with artists we'd been working with for 2-3 years. Thandi Ntuli's Swiss Collaboration, Seba Kaapstad, The Birdsong Ensemble with Mandla Mlangeni. We had an interesting live mixtape concept with Bokani Dyer scheduled. We were talking to Msaki about a curated concept night. So, there was shock because we had these babies that couldn't materialize," he says.

Roughly 30 gigs between March and May were cancelled. "The financial impact had a big ripple effect on the broader network and ecosystem; not just the venue as a business, but our partners, production, the artists, the people we deal with, our suppliers."

In the March week when travel bans were announced, people immediately cancelled events and bookings; Williams had to manage dealing with staff and the paperwork of band cancellations.

Between April and May, the pair focused on realizing the space as a platform for content and worked on ideas that had previously been on the back-burner. "We had set up our pivoting strategy into video and film and were figuring out how to do that." He says it was inspiring to see things flourish online: "to see artists as a community working towards a movement. That helped us despite the revenue loss, it gave us hope that there's a whole new work birthing right in front of us and we should be a part of that."

But the administrative difficulties still continue. "It was important for us to keep the space open and to come back. We spent a substantial amount of time negotiating with people, suspending the business and putting it on ice." This included approaching their bank and landlord, who put their lease on ice. They presented evidence to Concerts SA about their pivot strategy and managed to re-direct CSA funding into creating shows for streaming, including filming South African Blue Note recording artist Nduduzo Makathini, as well as Carlo Mombelli, Bokani Dyer Mpho Sebina and Paul Hanmer among others. It's a model they're still in the process of testing.

An online crowdfunding campaign has helped pay staff salaries. "We'd all had a sit-down and discussed – we needed to figure out our plan B." They also accessed R20 000 funding from the Department of Sports, Arts and Culture. "We applied for ALL the support grants. We filled out all the forms and paperwork." This effort resulted in securing funding for the venue and for all the artists whose gigs had been cancelled between March and May. But the amount ran out very quickly: "Literally, we couldn't figure out do we pay the rates, or electricity so the alarm system can work, or do we pay our phone bill. Those decisions continue to this day," says Williams.

But he foresees a continuing need for support: "Maybe it's not about asking for cash from the government, but resources. For example, make all the parks available immediately for spring and summer, so we can do outdoor gigs. Let's create safe spaces, in this worst-case scenario. "It's a lot of emotional rollercoaster stuff, being unable to have certain pathways for making a living. We're still at a point where we are financially uncertain. We are hoping we don't get to a point where we have to go into forced liquidation. It was a big project opening the space because it's our culture and our legacy as well. We wanted to contribute to the creative community to forge a new identity for Joburg." For now, the venue remains closed with the Untitled Basement being used as a film studio.

Looking ahead, Williams says, "I've seen more creative output in this period than ever before. Artists, more than any other sphere, have been able to navigate the space they're in, to create out of nothing." He adds, "My feeling is that we're going to be coming back with amazing

content that could potentially uplift the nation. I think live music will be ready and strong, – but the question is whether the rest of the economy will be.”

CHAPTER FIVE: SURVEY RESULTS AND ANALYSIS

The survey methodology builds on period research done in 2019 into the impact of the Coronavirus pandemic on the cultural and creative industries, and also on recent research conducted by Concerts SA on live streaming in South Africa. This chapter will engage with the findings of these studies as they relate to the current data. Please refer to Chapter Two above for the research goals and questions and Chapter Four for an outline of the methodology; to Chapter Six below for triangulation with the additional open and extended responses provided, and for consideration of relevant policy measures; and to Chapter Seven for potential directions for future research.

The survey was designed to engage with stakeholders across the value chain. In total 687 completed online responses were received. However, respondents were given the option to omit questions they did not wish to answer and as noted above no more than 50% of respondents actually responded to any given question.

5.1. The survey population

In total, 46% of the sample responded to these questions, creating a profile of the respondents in which 53,5% were artists, 12,4% were independent music service professionals. Less than 16,1% of the respondents comprised venue owners, promoters, publishers or managers. The category of “other”, representing 39 respondents comprises responses from predominantly artists who did not select the option in the questionnaire, and development organisations and individuals performing a range of functions across the live events value chain. It is thus important to note that this study may reflect the perspective of artists more than other value chain players. However, as noted earlier, it also reflects the working structure of an industry in which role players at other points on the value chain often each service or employ multiple artists.

The overwhelming majority of the respondents were male (83,8%); 15,2% were female and just under 1% identified as non-binary. It is thus critical for other elements of the research to engage with the experiences of women and non-binary role players in the live music industry. Consistent with the profile of respondents, 61,8% of respondents were freelancers, and 20,8% were employers, with 7,1% employing full time and 3,9% employing part time employees.

The majority of role players responding to the survey had been in business or active in their occupation for longer than 5 years (63,7%) and 15,9% in business for less than 2 years. Just under 60% of organisations are formally registered as businesses with 40,8% operating as informal or unregistered businesses. The artist sample comprised the largest number of informal or unregistered enterprises (54,8%) while the sample of other role players indicated that 24% were unregistered.

The majority of respondents were based in urban centres in Gauteng (48,6%), the Western Cape (21,6%) and KwaZulu-Natal (13%). Smaller numbers of respondents were based in the Free State (5,2%), 3,7% from the Eastern Cape and Mpumalanga and 3,1% from the North West and Limpopo respectively. Less than 1% of respondents were based in the Northern Cape.

Of the 16% of respondents who provided information on employees, the majority were small employers with a workforce comprising a mix of full time employees, part time employees and freelancers. They employed between 1 and 2 people, full time, part time and as freelancers. It is important to note however the existence of larger employers, with workforces of 10 or more people, providing significant employment for freelancers.

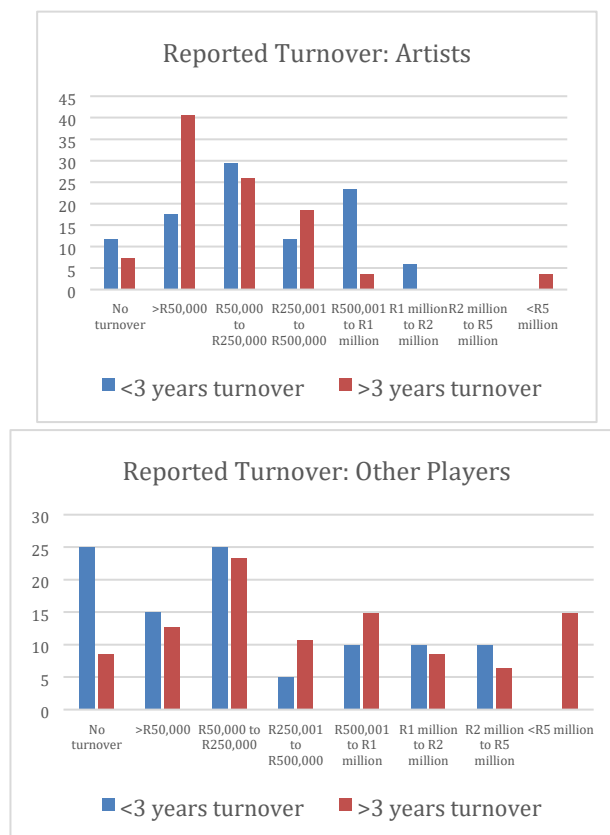
Consistent with the respondent profile, 89% of the respondents were micro-enterprises (in terms of the definition of SMMES) with turnover of less than R5 million per annum; 8,1% met the definition of small enterprises with a turnover of between R5 and R15 million and 2,4% had a turnover of between R15 and R40 million.

The significant number of artists in the sample meant that it was possible to create two sample groups, one for artists and other role players to shed light on the specific experiences of each group. Thus this chapter presents the data both in its combined form, and – where there are substantive and meaningful differences in two datasets – in terms of the separate datasets for “artists” and “other role players”.

5.2. Employment and turnover

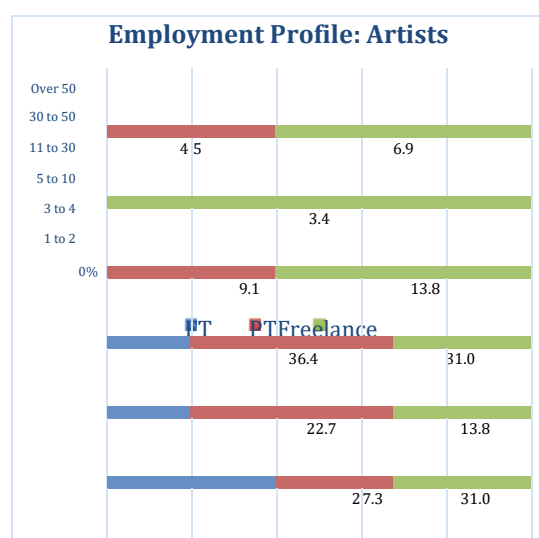
Respondent levels were low in both samples with 17.9% of respondents across the combined sample answering the question. Respondents in the “artist” sample group and that of the “other players” in the value chain presented contrasting profiles. In the “artist” sample, the majority reported turnover between R50,000 and R250,000 per annum in the category of having operating for less than three years. Just under 30% of respondents in this sample earned less than R50,000 per annum, an important indication of the precarious nature of economic survival in the business.

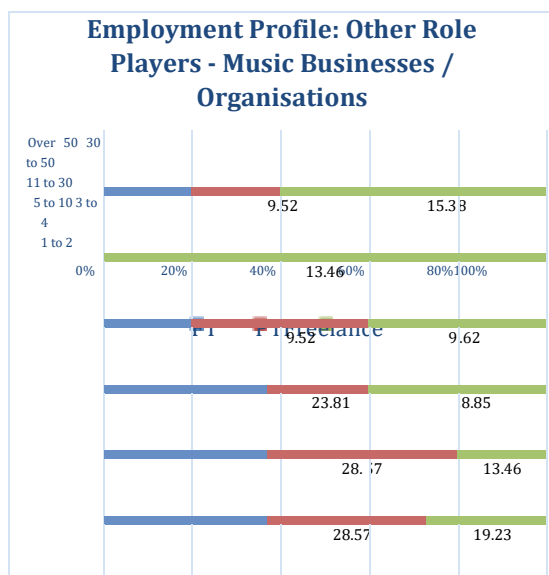
Figure 4: Artist and other role players - turnover



While approximately one quarter of the “other role players” category, including freelance music service professionals, reported turnover in both categories, over a third of the sample reported turnover levels of over R1 million per annum, an indication of the real and substantial value generated by the “non-creative” functions of the industry, as opposed to music origination and performance. The two areas are interdependent: “non-creative” role-players provide services to, and platforms and employment for, multiple musicians via events; those events would have no content without musicians.

Figure 5: Artist and other role players - employment





The employment profiles of artists differ from those of other role players. The number of respondents to this question was low across the combined sample: 10.4% reported on full time employees; 10.7% on part time workers and 12.8 on freelancers. Artists largely employed between 1 and 2 full time and part time staff and between 1 and 2 freelancers. A quarter employed between 5 and 10 full time and part time employees and freelancers. By contrast, other role players have a large, consistent employment base, with approximately a third each employing 1 to 2, 3 to 4 and 5 to 10 employees (full and part time) and a similar number of freelancers. Only a small number of role players, and only one respondent in the artist cohort, employed more than 30 part time employees and freelancers. Employment resilience and future work-creation in live music thus depends heavily on a large cohort of very small employers being able to stay in business through the shocks of the pandemic.

5.3. Experiences of COVID-19

The live music sector was undoubtedly one of the hardest hit by the coronavirus pandemic locally and internationally. In the combined sample, 88% of the live events sector experienced cancellations or indefinite postponement of planned work. Over 85% of artists reported that they had experienced loss of income due to these cancellations, while 93% of other sector role players also reported postponements or cancellations. Looking at the impact of these losses, just 50% reported between half and all of their income was impacted.

5.3.1. Lockdown impact on the viability of live music business and employment

All respondents reported significant losses of income: 49% of artists and 47% of other role players indicated that they had lost between half and all of their 2020 income.

Figure 6: Impact of cancellations on 2020 income

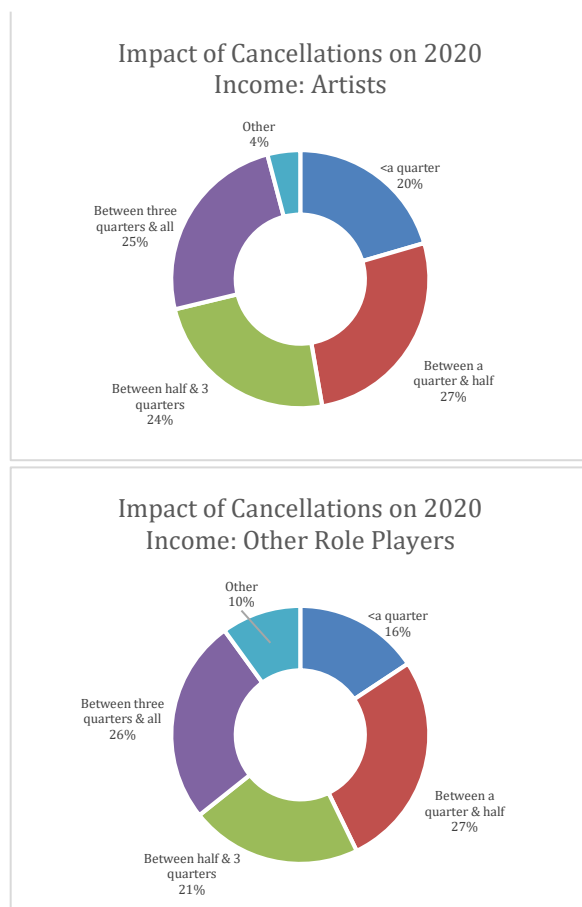
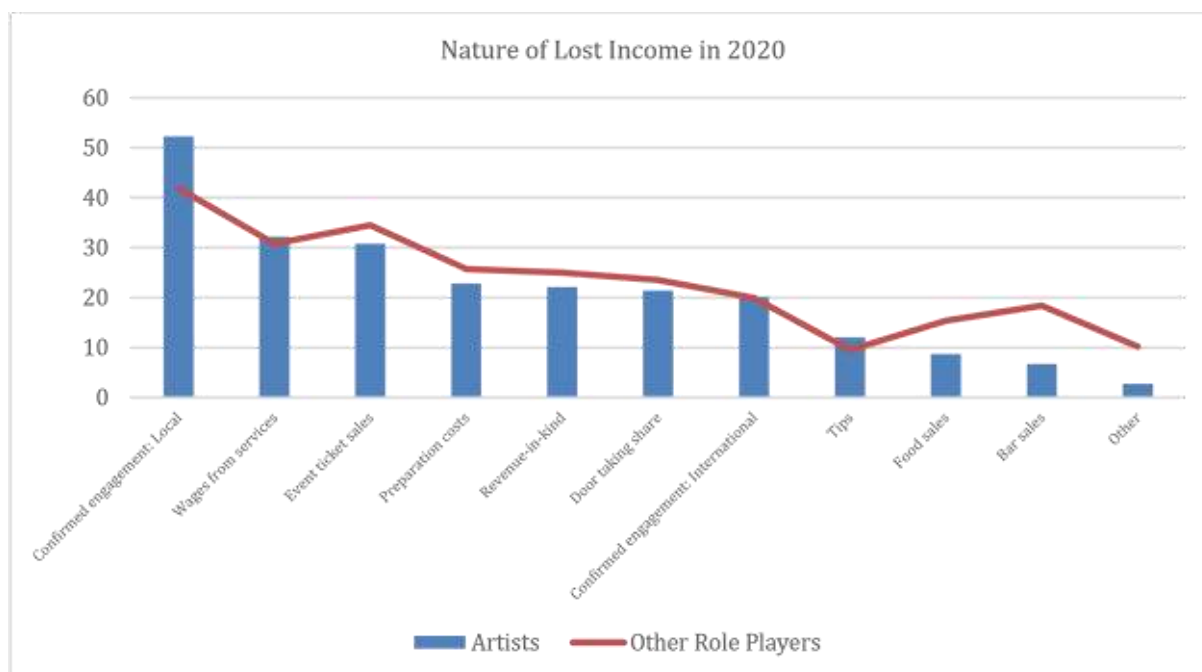


Figure 7: Nature of lost income



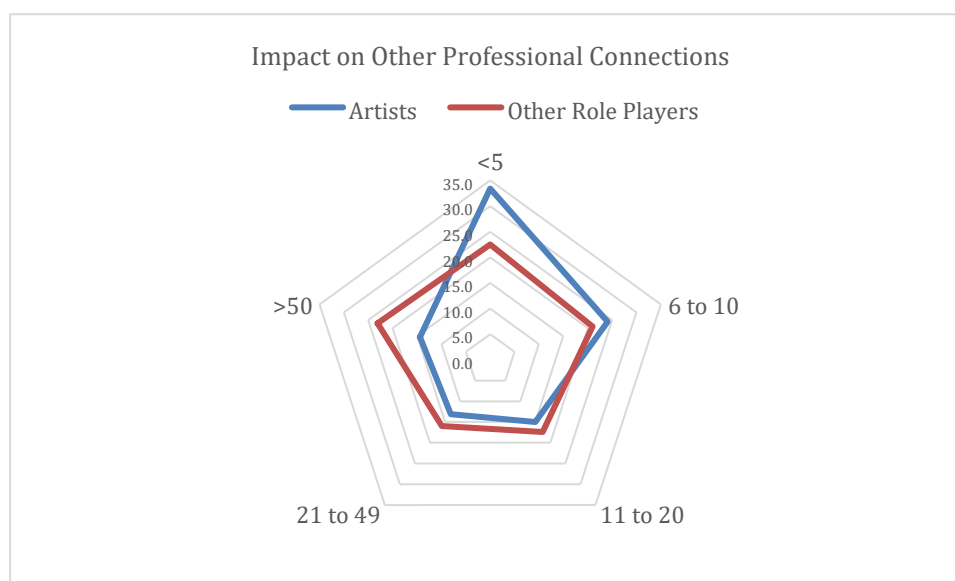
Artists and other role players derive income from multiple revenue streams including engagements, food and beverage sales in venues and door takings. Artists lost the

bulk of their revenue through the cancellation/postponement of confirmed engagements locally, loss of wages from services, and loss of their share of event ticket sales. Other role players echoed this pattern, with a greater emphasis on lost revenue from event sales, preparation costs and food and bar sales. Artists and other role players are heavily dependent on local engagements as their primary revenue stream from live events, and Chapter Six will further discuss the importance of the local area as an employment and revenue generator.

The impact of the pandemic has not only been devastating for artists, venues, promoters and other live music industry role players. There has also been a substantial impact on other professions associated with the sector. As well as performers (82.6%) these include:

- Specialist support professionals, eg technical production, sound, lighting and recording professionals (64,6%)
- General support personnel, eg venue staff and transporters (51,3%)
- Suppliers of equipment, costumes etc (42,4%)

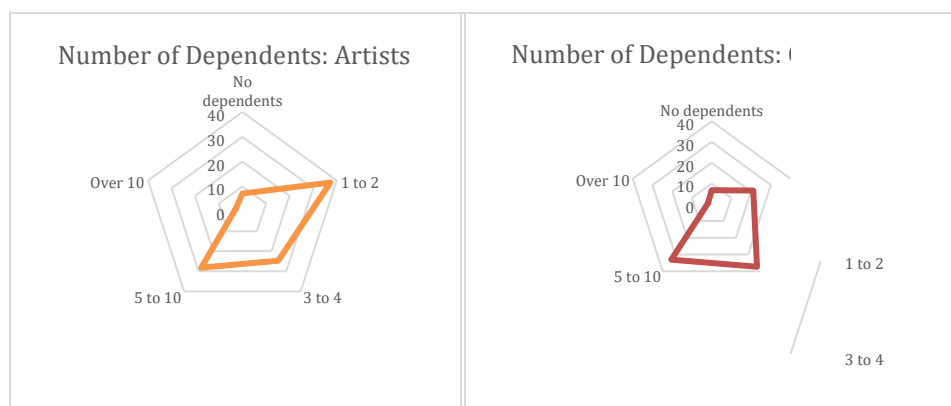
Figure 8: Impact of professional connections



Just under 60% of artists participating in the survey indicated that the losses they experiences impacted on between 1 and 10 related professions, while one third of other role players reported that their losses impacted on between 11 and 50 others. Just under a quarter (23%) of the other role players indicated that over 50 related professionals were impacted. This concurs with the findings of earlier research^{xliii}

The loss of income had an equally impoverishing impact on the family members of live music event industry participants. The majority (70,4%) of role players reported that between 3 and 10 dependants were impacted, while 61% of artists reported that between 1 and 4 dependants were impacted.

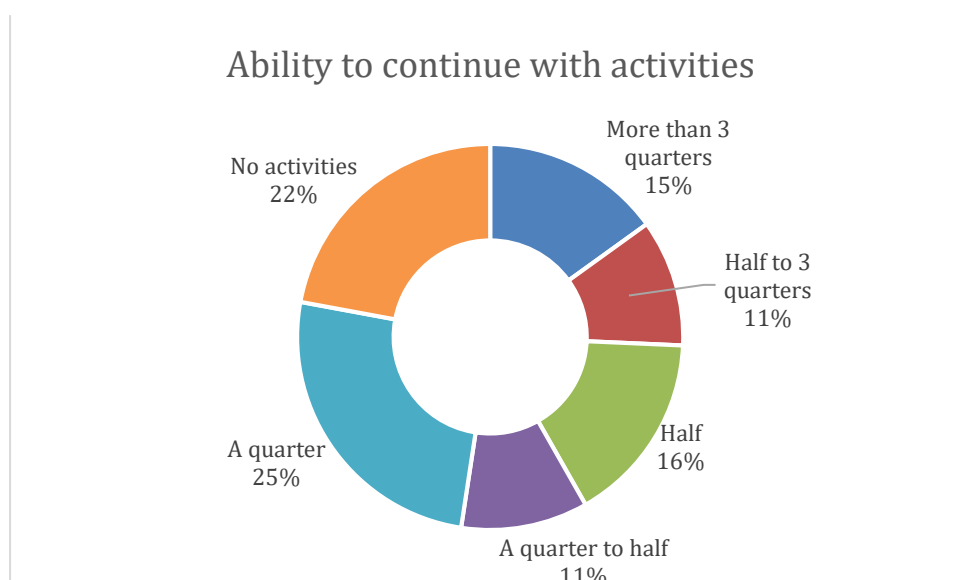
Figure 9: Respondent dependants impacted by loss of income



When asked if respondents (or their employees) would be able to continue working during the pandemic, a distressingly high percentage of respondents reported that they would be able to go on with either 25% or less of their activities – and in the case of 22%, with no activities at all. 26% indicated that they could continue with between a quarter and half of their activities, while 26% indicated that they would be able to continue between half and more than three-quarters of their activities.

Most concerning is the cohort of music practitioners unable to continue with any, or below 25%, of their music-related activities. Poised on this economic knife-edge, prolongation of any aspect of the COVID crisis risks driving at least 47% of practitioners out of the industry altogether. This risk is heightened with the reopening of the economy, lifting of restrictions and the prospects of the second wave of the pandemic and subsequent lockdown implications.

Figure 10: Ability of respondents & employees (if any) to continue with activities



5.3.2. Resilience and adaptation strategies

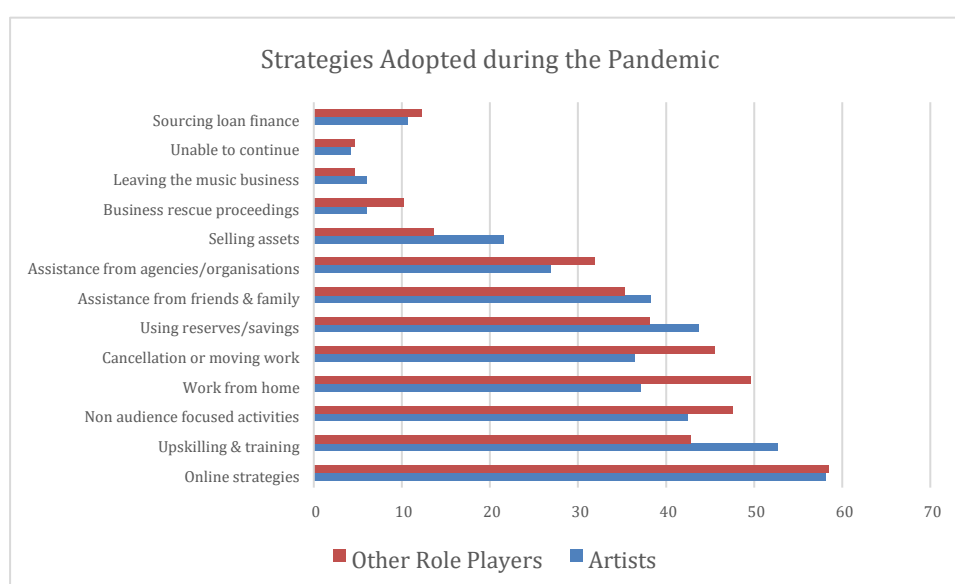
The live events industry has emerged as an agile and flexible sector, with some ability to adjust business and personal strategies to adapt to harsh economic and social realities.

Across the entire sample, a range of strategies have been adopted to ensure the survival of both informal and formal enterprises. The most prevalent include the adoption of online strategies (58,%), upskilling and training for themselves and staff members (48,4%) and emphasising non-audience-focused activities (44,3%). In examining the disaggregated sample, over and above online strategies, artists were most likely to adopt upskilling and training themselves (52,7%); over 40% were utilising savings and reserves to survive; and 38,2% had approached friends and families for loan finance. However, the viability of many of these strategies rests on an optimistic view of future prospects (which, we demonstrate below, does exist). The potential for earning from online strategies exists, but remains often unrealised ^{xliii}; upskilling depends on work opportunities to employ the enhanced skills; loans will need to be repaid.

Other role players in the sector adopted similar strategies but with different intensity. Exploring online strategies was a first choice; after this, the majority (49,7%) were adopting flexible working from home strategies; focusing on elements that did not require face to face engagement (47,6%); negotiating with clients to postpone work (45,6%); while, again, 42,9% were using the time to upskill and train themselves and their staff.

While these responses represent less than 10% of both samples, it is again important to note that a number of respondents indicated that they were not able to proceed at all. Further, in other datasets, a range of respondents across both groups indicate they are seeking opportunities outside the music industry given the lack of certainty about the pandemic, the lockdown and the future of the industry more broadly.

Figure 11: Strategies adopted by live music industry respondents



Non-live music strategies adopted included either exploring business opportunities and activities outside of the music industry to supplement music activities; or switching their primary emphasis to supplementary activities, eg teaching.

5.3.2.1. (a) Live streaming/ online strategies

As indicated above, a significant number of respondents were adopting online models to continue trading and generating revenue. This was true of both artists and other role players. With specific reference to live streaming 88,2% of participants indicated that they were putting effort into online music activities such as pre-recording for streaming, and live streaming. Many (66%) were considering this as an immediate term (6 months or less) strategy while 20,4% were considering these activities in the medium term (6-12 months). Only 13,5% were planning ahead for a year or more. In the light of the recent South African live streaming study^{xliv} suggesting that short-term live streaming revenue is not proving a viable income source, while longer-term revenue could well be, artists' success with this endeavour merits revisiting in future studies.

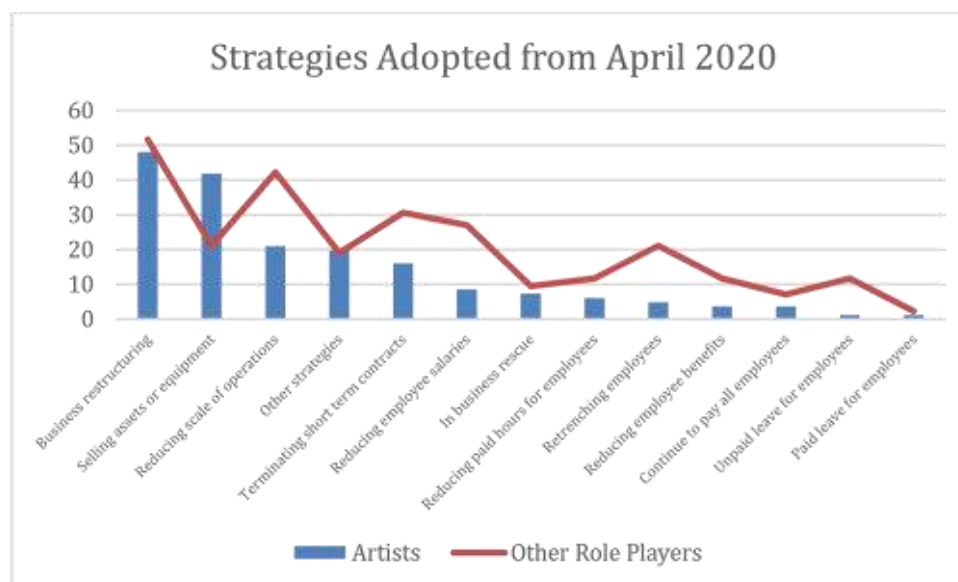
5.3.2.2. (b) Other strategies to stay operational from April 2020

Respondents indicated that additionally to online strategies, a range of actions were being taken as outlined in the figure below. In almost 50% of cases, in both the artist and other role player sample, business restructuring activities were adopted. However, artists were more likely to:

- Sell assets and equipment (41,9%)
- Reduce the scale of operations (21%)
- Undertake other activities (19,7%)
- Terminate short term contracts (16%)

The figure for sold assets and equipment is concerning. Given the high cost of music and sound equipment – which are often imported and hence attract both import duties and VAT – there is no certainty that artists with limited sources of income and debts will be in a position to replace this equipment in future. Practice on an instrument is a daily necessity for an instrumentalist, so sold instruments lead to de-skilling and an inability to undertake future work. Sold electronic equipment reduces ability to participate in the digital arena. Further, if their music activities have depended on being able to bring their own sound equipment to an event, this could preclude some artists returning to the industry even when performance circumstances improve. The knockon effect is that barriers to re-entry into all segments of the value chain will eliminate many functioning – and employing – small entities.

Figure 12: Strategies adopted from April 2020



In the case of other role players in the sector, their responses were more likely to encompass reducing the scale of operations (42,3%), terminating short term contracts (30,6%), reducing employee salaries (27%), retrenching employees (21,1%) and other strategies (19,1%).

Other strategies adopted across both sample groups included:

- Requesting loan holidays
- Suspending supplier contracts
- Applying for UIF TERS benefits
- Crowdfunding campaigns

5.4. Take-up of and attitudes towards sector support

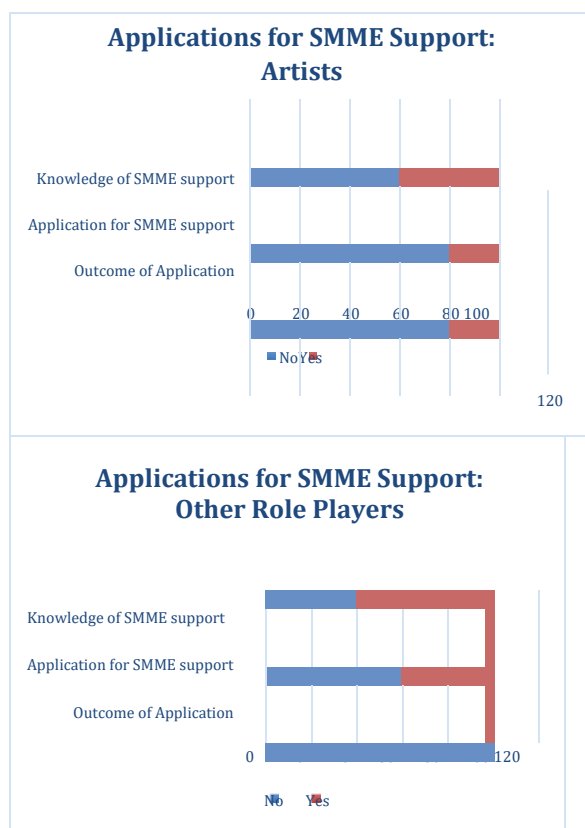
5.4.1. SMME Support

In the artist sample 37,2% indicated that they were aware of the support offered but only 22,5% applied and 10% were successful. Other role players had greater knowledge of what was on offer. However, despite 52% knowing about the support, only 28,8% applied and just over 4% of their applications had successful outcome.

When asked why they did not apply, responses in the main related to:

- The perceived ineligibility of music industry business for this support
- Concerns about the repayment terms of loan finance
- The ineligibility of informal enterprises for all support measures
- Lack of trust in the process and the government

Figure 13: Knowledge of and applications for SMME support



Responding about why applications were not successful, survey participants indicated that:

- Their BBBEE credentials did not qualify them for support
- Hospitality industry businesses were excluded from some schemes
- They had been notified of a lack of funds
- They were unable to provide formal documentation, leading to incomplete applications
- The perceived risks of the industry constrained formal financial sector loans □
Lack of eligibility of freelancers

It is important to note that a substantial number of respondents indicated that they were not informed as to the reason for their application being unsuccessful, or were still awaiting an outcome.

5.4.2. Department of Sport, Arts & Culture COVID-19 Relief Funding

The Department of Sport, Arts and Culture (DSAC) announced a R150 million relief fund for sport, arts and culture on 25 March 2020 with a closing date of 6 April 2020. Only applicants affected by event cancellations of DSAC funded projects from 16 March to June 2020 were eligible for consideration. The first wave application process also included provision for some non-DSAC funded projects – specifically projects with a national footprint and particularly those submitted by national industry organisations – and also projects between April and June that had existing partnerships or the potential to attract funders or investors. Providing an update on 17 April 2020, DSAC

reported that it had received 6,000 applications of which 5,000 were valid applications². Subsequently, this became a first wave of relief. However, with very short notice to respond, and stringent application criteria that many potential beneficiaries were unable to meet, the funding process received considerable negative publicity.

Reporting to the Portfolio Committee of Sport, Arts and Culture on 20 May 2020, the Department indicated that a panel of 30 independent adjudicators were appointed to review a final list of 3,346 applications of which 2,990 were relief proposals and 353 for digital projects. An appeal process was set in place to facilitate a review of unsuccessful applications which started in May 2020. At the time of the meeting, it was reported that 985 applications had been processed and 409 paid; 587 appeal applications had been received of which 57 had been considered and 29 awarded funds. On 27 May 2020, the Department released a list of grant recipients dated 24 May 2020 with 487 recipients stipulating that the maximum grant considered was R20,000³. Taken as a proportion of the 2,990 relief applications reviewed, this represents a 16,2% success rate. As outlined below, the live music sector reported a slightly higher success rate of 20,9%, albeit calculated using a different method.

A new wave of funding was announced on 17 August 2020⁴. This funding had a maximum threshold of R6,600 paid out as single tranche. The second wave would administer R77 million in relief for the sport, arts and culture sector, while R11,5 million was set aside for a joint initiative with the Department of Small Business Development valued at R23 million to support craft, design and visual arts sectors.

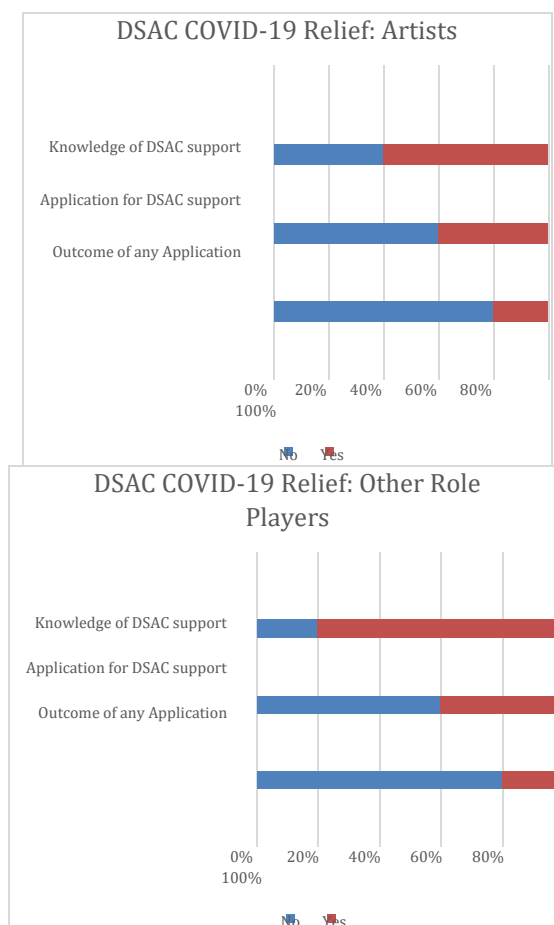
Given the timing of the survey, respondents would have been able to report on both the 1st and 2nd waves of funding. With respect to the COVID-19 relief support offered by the Department of Sport, Arts and Culture (DSAC) 59,5% of respondents in the arts sample indicated that they knew about the support offered, 37,5% indicated that they applied but only 21,7% reported that their applications were successful. Of the other role player sample 68,3% reported knowing about the DSAC relief funds, only 32,6% indicated that they had applied and 20,5% reported that they had a positive outcome.

² Media Statement: Sport, Arts & Culture progress regarding applications for Coronavirus COVID-19 relief fund: <https://www.gov.za/speeches/departmentsport-arts-and-culture-progress-regarding-applications-coronavirus-COVID-19>

³ http://ipo.org.za/wp-content/uploads/2020/05/DSAC-COVID-19-PaymentsSummary-24-May-2020_o.pdf

⁴ Minister of Sport, Arts & Culture on the Close Out of the First Wave of COVID-19 Relief Fund and the state of readiness of for the Roll-Out of the Second Wave of Relief Funding: <https://www.srsa.gov.za/media/minister-sport-arts-and-cultureclose-out-first-wave-COVID-19-relief-fund-and-state-readiness>

Figure 14: DSAC and other COVID-19 relief



Explaining why they did not apply, respondents indicated that:

- They were not aware of the funding and how to apply for it or that the funding window had closed by the time they became aware of it
- They did not meet the criteria for documentation required, especially the confirmation of contract/gig cancellations and formal business registration
- They did not apply as there were other options open to them and they preferred that those who really needed resources receive them
- The funding period was too narrow to capture the full scale of cancellations which occurred after April 2020 (In the music industry, January-Easter is usually a relatively slow work period; musicians in particular normally plan to bridge this period from savings set aside from earnings in the previous April/December. This means that January-Easter 2021 will be a particularly impoverished period.)

The reasons provided for unsuccessful applications included:

- Available funds having been exhausted
- A perceived bias of the process towards or against certain groups

A number of respondents commented that the level of support provided was very low, and would not be adequate to meet expenses.

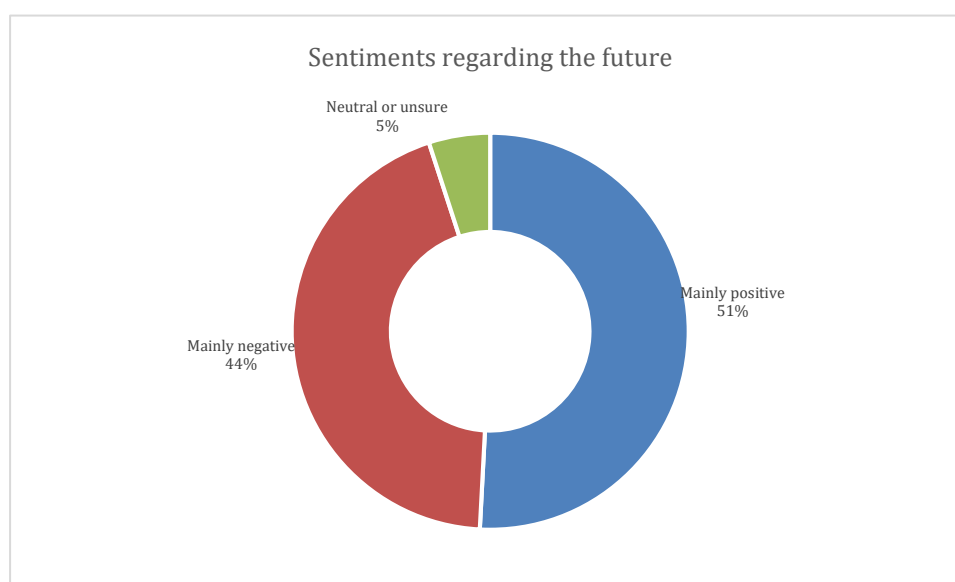
Many respondents indicated that no reason had been provided or that no outcome had been communicated. At least one respondent indicated that despite being successful; no funds were received. A perception of poor official communication emerges from the responses concerning all sources of government support: about its availability and parameters, and about the results of applications.

5.5. Perspectives on the future

There was an almost even split of positive and negative sentiment with regard to the future and the profile was consistent across artists and other role players. This is surprising given the state of the live events industry generally as well as recent actions and statements by certain individuals in the industry. When asked about their views on the future, 48% felt largely negative about the live music sector, 5% felt unsure or neutral and 47% felt positive about the future.

Nevertheless, it should be noted that the loss of so many industry participants possible if negative perceptions intensify and translate into actions would still be devastating for the sector. Further, because of the number of musicians employed, supported or serviced by other industry role-players, the impact of negative perceptions on the part of, for example, venue owners, would have a major negative multiplier effect on revenue and employment prospects in the sector overall.

Figure 15: Sentiments about the future



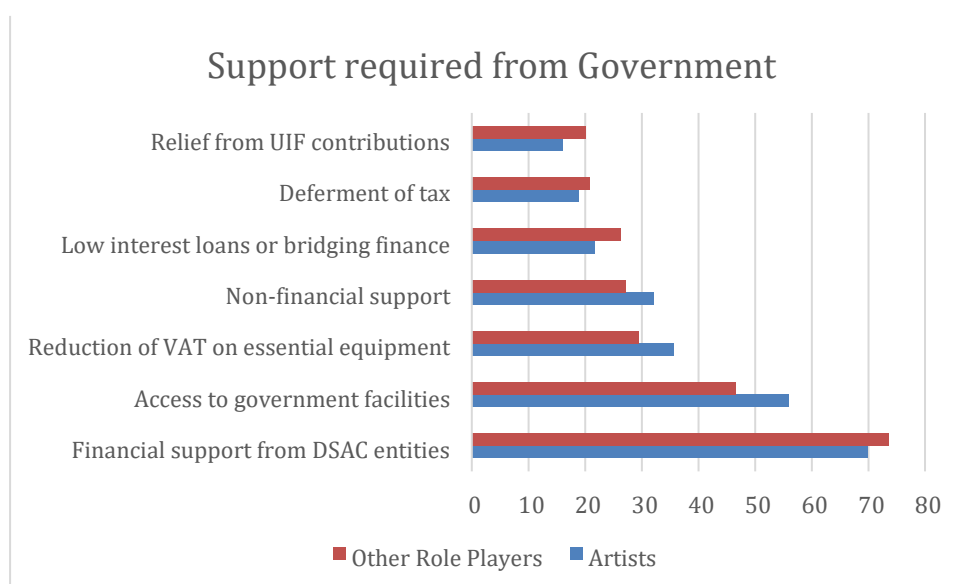
5.6. The live music industry and government's response

5.6.1. Support required from government and other stakeholders

Unsurprisingly, and consistent with industry calls for support across the board, over 70% all respondents% would appreciate financial support from the DSAC and its entities, 51,6% access to government facilities, and 31,6% reduced VAT on essential equipment. Non-financial support and access to financial instruments such as low interest loans were requested by 29,4% and 25% of respondents respectively. What forms these various supports might take received important extra detail from the responses to open questions in this section.

Given the high numbers of informal business respondents in the survey, standard business support instruments such as tax deferrals, reduction of statutory employee contributions were less popular choices. Although there was a degree of consistency between the artist and other role players, however about a quarter of other role players placed stronger emphasis on business incentive instruments such as low interest loans, tax deferrals and relief from UIF contributions.

Figure 16: Support required from government



Other supports requested included:

- Funding for alternative working spaces
- Full compensation for activities curtailed by measures to prevent the spread of the pandemic
- Access to technology, equipment and the internet
- Campaigns to promote local music, especially in the broadcast space, and support for marketing both live and online activities
- Support for specific value-chain participants such as music venues
- Support for placing work online and the creation of income opportunities for artists through virtual government events
- Investment in the music industry across the board, particularly live outdoor events
- Upskilling of the industry, particularly technical crews and management skills
- Improvement in government services and attention to the arts and the music sector in particular

5.6.2. Policy recommendations

The survey asked respondents to make 3 recommendations to inform future policy directions. While the artists and other role players did make different proposals, there was consistency in 6 major areas; funding, improving government services, lifting of lockdown restrictions, promoting local content, creating mechanisms for ongoing and meaningful communication and engagement with DSAC, facilitating access to venues for artists, and support for internet access and technology adoption.

With regard to funding, recommendations differed in emphasis between the two samples as outlined below:

Funding: Artists	Funding: Other Role Players
<ul style="list-style-type: none"> <input type="checkbox"/> Support to procure equipment & instruments <input type="checkbox"/> Support for residencies <input type="checkbox"/> Basic income grant for artists <input type="checkbox"/> Dedicated support for productions and performances <input type="checkbox"/> Support for distribution and promotion <input type="checkbox"/> Support for COVID-19 prevention and particularly PPE <input type="checkbox"/> Government scheme to underwrite risks for large productions <ul style="list-style-type: none"> • Specific funding mechanisms for young artists • The creation of paid opportunities to perform • Support for online platforms • Tax relief to compensate for COVID-19 losses • Financial support for live music venues • Creating a national programme to get work for artists 	<ul style="list-style-type: none"> <input type="checkbox"/> Online work <input type="checkbox"/> Funding of sustainable projects and programmes <input type="checkbox"/> Start-up funding <input type="checkbox"/> Lifelong support for artists to advance their careers across <input type="checkbox"/> Refurbishing of institutions, studios and venues for online work <input type="checkbox"/> Support for SASREA, OHS & COVID-19 compliance including PPE <input type="checkbox"/> Incentives for skills retention & development <input type="checkbox"/> Incentives to support growth and innovation

There was significant concern about the quality, efficiency and effectiveness of government services across both groups: perceptions of corruption; poor communication and feedback, and a lack of knowledge and understanding of actual working practices. These concerns are detailed in section 6.X below.

Specific to each sample group, recommendations were also made to:

Artists	Other Role Players
Non-financial support in the form of management, contracting etc	Reducing VAT on live events industry equipment
Education & training at all levels	Implementation of anti-piracy programmes
Social security for artists especially medical aid and funeral cover	Development and maintenance of a comprehensive industry directory
Protection of the rights and status of the artists	Enforcement of licensing for royalty collection
Support for a musician's union	

I	Ongoing and accessible market research	
I	National talent identification programmes	

5.7. Reflecting on prior research

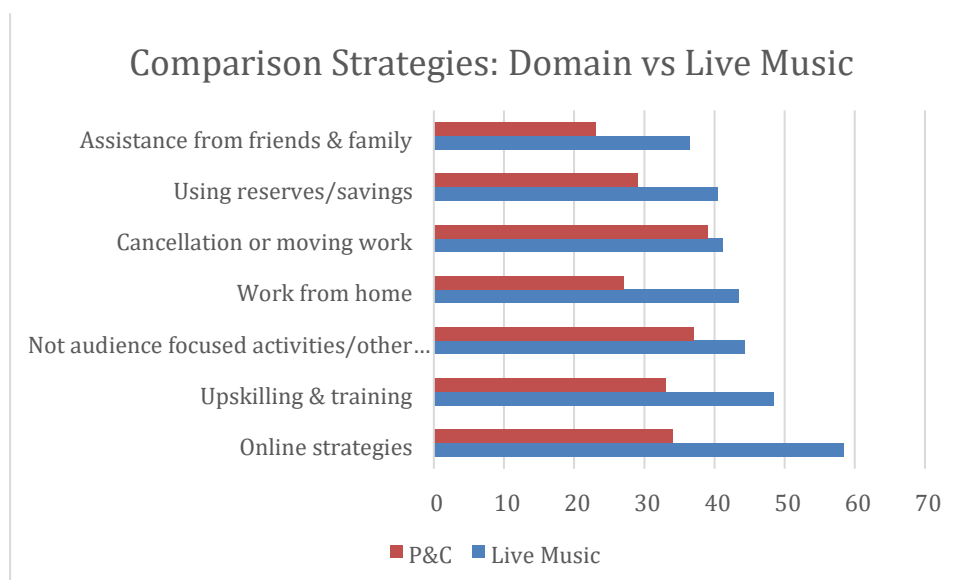
In May 2020, SACO released a comprehensive report titled *Measuring the Impact of the COVID-19 Crisis on the Cultural and Creative Industries in South Africa: An Early Assessment*. Designed as a companion piece to that study, the current research aimed to assess the impact of COVID-19 and the response of the live music sector. The SACO research did not examine sub-sectors in detail, rather using the UNESCO cultural domains to capture and report on the impact of the pandemic. Consolidated into the Performance and Celebration domain which comprised 28% of the sample the research established that:

- Formally registered organisations appeared to have experienced high levels of impact from cancellations. However, the informal sector also reported substantial impacts from cancellations in early 2020.
- Unsurprisingly, the most substantial impacts were reported by those businesses with elements dependent on face-to-face interactions. Given the high levels of interrelationships between different types of business in the sector, it was however clear that impacts were also recorded by those businesses in the sector that directly depended less on face to face interactions.

Consistent with the current research, 54% of respondents operating business with substantial face-to-face elements could not continue with any business activities at all, compared with those in businesses less reliant on face-to-face interactions. In that study, and consistent with the current data set 12% could continue with more than half of their normal operations. The SACO research found that role players in UNESCO's "Performance and Celebration" activity were the most vulnerable to the impact of COVID-19, with 80% of respondents indicating that they could not continue with "normal" business operations.

Respondents in the May survey had optimistic expectations about opportunities online, and the current research reinforces how the live music sector has engaged substantially with work online in a very short space of time. The Concerts SA research on live streaming^{xiv} however, presents a cautionary tale of the challenges of generating particularly immediate income through live-streaming. The conclusions of that study point to the value of online work as part of a business model, noting with concern that neither artists, venues, festivals or other role players have been able to achieve preCOVID levels of income through online work.

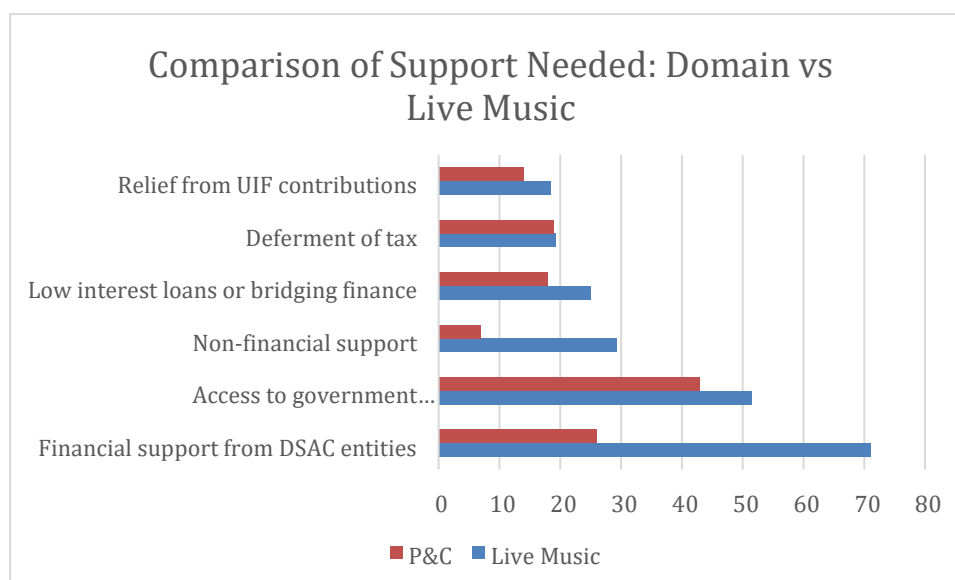
Figure 17: Comparison of strategies - live music vs performance and celebration (P&C) activity



Dependence on informal and limited sources of support and assistance such as family, short-term solutions such as consuming savings, and as-yet unproven revenue sources such as online streaming was more marked in the music sector, and this raises important questions about future sustainability.

Consistent with the current research, the P&C activity reported high levels of awareness of government support initiatives (76%), but very low levels of confidence that they would be eligible (35%), with 45% reporting that they did not know if they would be eligible.

Figure 18: Comparison of Support Needed: Performance & Celebration Activity vs Live Music



While largely consistent with the larger activity and the older survey, the live music sector reported considerably higher hopes of and need for financial and non-financial support. Unsurprisingly, given the predominantly small-scale, low-turnover, and project-based nature of their operations, live music respondents emphasised more strongly the need to access government facilities to support their operations.

5.8. Conclusion

What emerges from the quantitative snapshot of the live music industry is a value chain operating at fairly low levels of turnover, with the exception of a handful of large companies, employing a mix of full time and part-time employees and freelancers, though skewed towards the latter categories. Multiple revenue streams make up the turnover of the sector, however it is largely dependent on local engagements – in other words, local live performance – for its livelihood. COVID-19 and the efforts to curb the spread of the pandemic locally and internationally impacted substantially on the income of the survey respondents and the (on average 5-10) related professionals they work with in the live events sector. These include not only artists, but technicians, other service workers, and specialist and general suppliers.

Almost half of respondents indicated a largely negative outlook for the sector, despite making it clear in responses to other questions how agile they have been in proactively adapting, or planning to adapt – in fewer than 6 months – to prevailing conditions. The primary but not sole strategy adopted by both artists and other role players has been to explore opportunities for the production and presentation of online work. The recent Concerts SA study into live streaming^{xlvi}, indicates that this is a vibrant and growing area. However, that small-sample early survey also revealed that income for both artists and other role players has not yet begun to reach levels where it might come close to replacing income lost from live events, and that constraints on its doing so require urgent attention from government and other industry actors.

The survey also confirmed the significant need for consistent, fit-for-purpose and dedicated support for live music and its venues across multiple aspects, including the provision of financial support for a range of activities, providing access to the internet and other technologies, improving government services across the board, supporting local content and creating and sustaining mechanisms for engagement with the sector.

Given the limitations of statistical data alone in providing deeper insights into the impact of COVID-19 on the live music industry, the research also made provision for a series of unstructured responses to key questions. At a simple quantitative level, the data from these responses is captured in Chapter Five above. However, the research engages directly with these responses to gain more insight into the lived experience of the sector in participants' own words in an integrative discussion. This follows below as part of Chapter Six.

CASE STUDY SIX: DELIVERY MECHANISM ON THE INDUSTRY VALUE CHAIN KOKO KALASHE – ORGANISER OF A CITY AND TOWNSHIP MUSIC CIRCUIT

Jazz in the Native Yards (JINY) has become a favourite destination for jazz lovers living outside the Cape Town metropolis who want to experience live music.

Conceived by Koko Kalashe and Luvuyo Kakaza in 2013, the series brings music to communities on the outskirts of the city. Lockdown and COVID-19, says Kalashe, deeply affected their ability to continue. Four community concerts were cancelled immediately, as well as their regular shows at the city's Alliance Francaise. A massive blow was the cancellation of the much-anticipated UNESCO International Jazz Day celebrations, for which Cape Town had been appointed 2020 world host city.

March 2020 was thus set to be very busy for the pair. International Jazz Day, he says, "was a really big deal. Everything was booked and laid out. We had spoken to production people; advertising; all the peripheral people around– all that fell flat because of COVID." Further, money advanced by sponsors was recalled. "So, we had to pay money back; we were hit personally in the pocket because obviously we would have earned money through those concerts." The last-minute nature of cancellations was also highly stressful, "It reverberated right through all the organisations and people we dealt with."

From an industry perspective, Kalashe describes the time as "almost like a collective depression situation. We had to think very quickly and of course the live-streaming thing was becoming popular as an alternative. But we were not prepared for it."

The essence of JINY is bringing live music to people in township areas – its name deliberately evokes the proud music heritage of those communities – with gigs often hosted in relaxed social outdoor spaces.

At first, Kalashe says, their experiments with streaming stumbled for a range of technical and other reasons. "Think about our gigs. Our *modus operandi* is to bring music to the people. And if you think about where the people are, internet isn't great there."

However, JINY has been one of the first in the Cape to bounce back. "We quickly went back to the drawing board," he says. At Level 2, they experimented with a strictly healthcontrolled, small-audience event at their regular space in Kwa Sec in Gugulethu. Now, they've found new ways to manifest: regular physical live gigs or the option for a featured artist to record at Penny Lane Studios for on-demand streaming, assisted by partners Eastern Acoustics. That will "help the artist earn beyond the live gig," Kalashe says.

"In one-way COVID was terrible, but it also pushed us into another space, where we are thinking further than just live concerts. Get the musicians to go into studio and record something and offer something for the people who miss live concerts and those who prefer to stay indoors."

Kalashe says they were put in a "hat-in-hand" situations asking for COVID-relief funds whose applications were tricky. "So that's not a nice feeling at all. To be honest with you, the way we set up JINY is that it sustains itself. And then to have to start asking for support was really hard. I've always known that the arts community is not getting much support from government departments. COVID just exposed it for what it was and it was on another level completely. And now we know, for sure, that we're on our own," he says.

To assist musicians unable to supply the extensive paperwork required for relief fund applications, he adds, "I sent a call out to the musicians we were going to feature - to say, I'll write you a letter to say you've lost so much because for not playing the gig. Anybody who needed a letter of support, we were offering that."

During lockdown one of JINY's main venues, the Guga S'thebe centre in Langa, burnt down. Kalashe feels the government could assist more by creating similar spaces in such communities, rather than relying on just one limited space.

An integrated approach, he believes, is the way to go. "The arts community needs to be closer to each other, so there's more synergy and support across the art world and between arts organisations." And, he says, "government could also streamline its financial support for the arts on a regular basis, not only in crises. It could use more of other agencies, not just the music agencies, also through social development and that sort of thing to make sure there's some attention to the arts through that. So, when crises like these do happen, people are on a stronger footing."

CHAPTER SIX: THE QUEST FOR RESILIENT RECOVERY – DISCUSSION AND RECOMMENDATIONS

The quantitative data set out in Chapter Five above, reinforced by case studies of service providers throughout, presents a picture of a highly interconnected music industry, where venues and other service providers serve multiple musicians; where freelance workers create work opportunities for multiple others – some of the biggest work providers represented in the data described themselves as ‘freelance.’ All depend on the very mobility, hospitality and sociality that are currently constrained by the pandemic, and such interconnections ripple outwards, multiplying the impact of COVID lockdowns – what SACO previously called “significant linkage impacts”. The digital transformation of the past two decades, transforming cultural value chains from “pipeline to network” (UNDP 2016) intensifies interconnections, while the World Economic Forum in its survey of the impact of COVID on the music industry^{xlvii} points out that the crisis is likely to further accelerate, among others, the already established trend towards industry integration.

To this must be added the impacts of the pandemic on the broader economy discussed in Chapter Three. Government, commercial and non-profit entities previously affording performance opportunities, sponsorship, donor funding and other support to music performances and events have themselves shed revenue and prospects and are no longer able to do this. That the word ‘devastating’ recurs so frequently in both our data and other discussions of the impact of COVID on live music is thus not surprising.

There were no major contradictions between the evidence yielded by the qualitative and quantitative datasets. Rather, coding of the open answers provided grounded accounts and concrete detail to illuminate the numbers, and robust support for the quantitative findings. In a few categories of response, the more granular detail suggested shifts in emphasis, but still firmly within the same range of findings.

One notable finding from the open responses was terminology and descriptions of circumstances and activities indicating that our respondents came from classical, traditional and gospel music circuits, as well as the more usually represented pop and jazz. Insights and input from these genres – gospel music has, after all, the largest segment of followers of any music genre in South Africa, and over treble the percentage of followers in any other country worldwide^{xlviii} – are very important for discussion of support measures that will be effective across all live music.

“We are upcoming. We used to make a living through street promotions at taxi ranks, weddings, which we book the spot 6 weeks before. When you look into weddings or church services we don’t draw contracts, we just do verbal agreement...so now we have no proof of all those cancelled shows.” – Research respondent

“There is a huge amount of classical artists, instrumentalists, orchestras, conductors and opera singers whose lives have been impacted. The classical music industry always stands last in the row when government sponsorships/donations are distributed. The money always is

distributed to the more popular music genres. What the government forgets is that what they call 'westernised' music is an important base for all music artists to start from, and for internationally acclaimed opera singers e.g. Pretty Yende, Levy Sekgapane, Pumeza Matshikiza, Njabulo Thabiso Madlala and Musa Ngqungwana who act as role models for the young and upcoming artists in SA." – Research respondent

This chapter expands the discussion of Chapter Five data into a consideration of potential practical solutions to the problems and dilemmas faced by live music and its venues, drawing on current international literature on music recovery practice.

6.1. Distinctive features and needs of the sector

The high degree of business interconnectedness noted above is not unique to the live music performance sector. However, the combination of this dense mesh of tightly interdependent but short-term, project-based, business relationships with operations formerly almost completely dependent on face-to-face sociality, hospitality and mobility presents a profile particularly vulnerable to the type of shock the COVID virus has triggered. Worldwide, hospitality, mobility and sociality suddenly ceased in March 2020. Their full restoration, as evidenced by the data from second-wave infections in overseas nations now opening up, could pose real public health risks until an effective vaccine exists and precise mechanisms of transmission are better understood – although such understanding is advancing rapidly, even as this report is completed.

Further, the relationship between 'job', 'work' and 'revenue' in the music industry is a complex one. To take one current example, a major South African international hit such as *Jerusalema* has attracted (at time of writing) more than 66 million Spotify streams of the song, in addition to becoming the fourth most-searched song on Shazam, and entering the global artists ranking at number 44 for the most streams on iTunes, Spotify, and Apple Music. The tiny fraction of a US cent each stream earns have thus accreted into worthwhile (short-term) revenue for its creators. But *Jerusalema* was based on only two people's 'work' and generated no direct 'jobs': it was created by a freelance DJ and vocalist in the DJ's own space, and posted directly online without engaging any other individuals.

Thus, any support to build recovery and resilience in live music and its venues needs to be able to accommodate:

- the sector's nature as an ecosystem, rather than discrete professions such as 'musician', 'venue' or 'sound company'.
- the short-term, project-based, highly variable and often informal nature of business arrangements and documentation, operating from a perspective of 'work' rather than 'jobs.'

"The COVID relief fund expected signed contracts as proof of confirmed work. All of my work was confirmed on email with contracts pending and deposits to be paid per show for the rest of the year. All these from mid-March were cancelled and all agreements were made null and void. How can I claim any proof... if the clients refuse to supply signed contracts that would hold them liable for my costs? It would put me in a bad light with these clients that I hope to do business with in future. I can supply all the emails."

“Production and engineers are mostly affected because they get paid by their time at work”

“We formed a network of technical crews who own equipment and we use that work as a network.” – Research respondents

6.2. Potential measures for resilient recovery

There has already been considerable research by professional organisations worldwide on the measures most likely to be conducive to industry recovery. These, fall broadly into the same main categories as our South African respondents’ suggestions: integration; provision of safe spaces; decentralisation; utilising digital opportunities; financial and in-kind support; and upgrading the interface between the sector and relevant authorities, including reducing constraining bureaucracy.

6.2.1. Sustained, integrated support across administrative boundaries.

“Align government policy across government departments especially DACST, DSBD and DTI in favor of the creative industries” – Research respondent

Many of our respondents, in discussing why they did not apply for, or receive, any forms of official COVID relief, expressed confusion about the various schemes and providers. Coding of open answers revealed allusions to “the province” or other business relief when asked about specific national DSAC arts-related relief, and viceversa. This suggests reconsideration of the communication processes around relief, and a specific recommendation to this effect is included at 6.4 below. However, it also suggests that the departmentally siloed provision of relief in relation to such an interconnected industry may reduce potential effectiveness. How, for example, to allocate relief to a South African cultural tourism provider such as Coffeebeans Routes (Case Study 4), which engages with tourism enterprises, hospitality providers, individual performers in more genres than music, and more, all of whom simultaneously lost income from the same COVID cancellations?

“ [I propose] lobbying for a Creative Industry Trade desk that has a music industry trade agency in the Department of Trade & Industry. A well setup agency will cultivate a collective industry growth, that understands the music industry as music content trade industry and decentralize the current operational modus operandi. It will further consolidate the import and export of music content both in a form of recorded audio, motion picture, protected by the current legislative acts and evolving cause of a corporative relationship between heritage and tradition. Cultivation of cultural creative commerce can only be successful when the roles of government co-exist beyond social cohesion, and cultural policies.” – Research respondent

A similar dilemma exists internationally, and there is consensus from international studies that measures must be not only be sustained, but integrated. Florida and Seman point out (2020 p.4)^{xlix}, “small, stop-gap measures will not undo the damage; a substantial and sustained creative-economy recovery strategy is required (...) [with] integrated teams to re-animate the streets”(p.22). This recommendation rests on an extensive and well-established literature on integrated creative city practice, for example, the 2010 recommendations from the European Creative Metropolises organisation^l for interdisciplinary co-operation, de-siloing of relevant public and private structures and integration between city creativity and tourism authorities.

6.2.2. Utilising publicly-controlled spaces

"Build more performance spaces and/or maintain existing ones i.e. town halls, and make them accessible (commission on profit vs venue hire fee). Artists currently have a meagre choice of very small venues (around 50-100 people capacity) and extremely slim pickings of large venues... [yet] ticket sales are the primary generator of revenue. These performance spaces must be built in areas in which there are currently few, if any, in existence - i.e. Cape Town has large venues in the CBD, but not in the outlying zones. This infrastructure is vital in sustaining a thriving [national] touring circuit ... areas in which these spaces are found also need to be adequately policed so community members feel safe. "

"Uncompromising support for live music venues. Subsidised artist fees at the venues. This should work around a sustainable model that is NOT like the grand tender based funding that sees much of the funds ending up in the hands of organisers. Live music venues are the most important." – Research respondents

Respondents' open responses frequently featured the point that national and local governments control spaces that could be made more widely accessible as performance or live stream recording venues. Among those mentioned were State Theatre facilities, SABC studios, civic buildings and local community centres.

Given an increasing volume of research on the greater comparative safety of wellspaced outdoor activities^{li} – and South Africa's climatic advantages, even in Winter, in outdoor conditions – we could also add city squares, parks and other officiallycontrolled outdoor spaces.

Again, international recommendations concur. Florida and Seman (2020), for example, urge that "spaces must be made available affordably." However, in the South African context, prevailing inequalities mean this has broader implications. As one respondent quoted above points out in relation to Cape Town, metropolitan performance spaces exist; township and other geographically peripheral areas lack them. That inequality extends to open-air spaces. The organisation green-apartheid-zsv.co.za mapped South Africa's green spaces and found their distribution both historically and persistently skewed towards affluent areas, and constrained by neglect of maintenance elsewhere.^{lii}

Alongside these issues of physical access, multiple administrative requirements constrain the use of South African public spaces. The international organisation Nighttime.org in its Global Nighttime Recovery Plan^{liii} cites the example of the city of Vilnius, where city authorities are providing free spaces and waiving event license fees.

6.2.3. Decentralising to strengthen local public life

" [Restart community initiatives] housed in city/town halls in various communities with appropriate technical and managerial support from key players in the sector. An encouragement of communities to participate would go a long way in uplifting and stimulating a vibrant arts micro-economy." – Research respondent

Two terms emerged as dominant from the coding of open responses. Although references to desperately-needed cash relief correctly and predictably dominated the

quantitative responses on desired support measures, ‘money’ ranked third among open answers. Money was already self-evident from the closed response options; qualitative answers most often elaborated further on the kinds of support that would be most helpful. The two most frequently recurring terms emerging from the coding were ‘digital’ and related terms (discussed below at 6.3.4), and various types of reference to ‘local’.

‘Local’ was discussed in relation to local content provisions, to utilising local SMMEs as service providers, to the geography and specific sites of performance, and to the types and scale of events that various arms of national and local authorities fund. It was also employed in discussions of rural or township as opposed to metropolitan music activities. “Our local municipalities in terms of arts and culture/sports and recreations doesn’t perform well. Most of time they don’t book local artists while they need them to grow. They expect them to go Gauteng and [only] afterward will consider them as their products,” noted one respondent.

None of this is surprising; national mega-events, as the *CSA Heartbeat* report noted even before the pandemic^{iv} have in the past often provided marketing opportunities to global brands “can easily bring its audience and support staff with it, [and] price local community members out of attendance ...” (p 29). While that is not necessarily the case, it has fostered caution among all who may seek work opportunities from events.

Additionally, CSA’s earlier *Song Lines* report^{iv} drew out the links between decentralising cultural spending and successfully developing relevant, audiencecentric arts policies in the longer term. Demand-side stimuli – such as Brazil and Italy’s cultural vouchers and Holland’s culture card – will be extremely helpful in building and rebuilding music audiences in both virtual and live settings, but many consumers will respond best to such stimuli if the product is physically accessible or familiar: again, local.

Further, as Florida and Seman note (2020 p 4), the conditions of COVID and lockdown have rendered live mega-events both dangerous and less feasible, suggesting a shift of focus to locally-sourced culture. Among multiple concurring international studies, the EU Cultural and Creative Cities Report (JRC, 2020 p 19), urges “a reorganisation of the local cultural offering towards a more regional/local market” and a strengthening of links with local communities and a “change in incentives” to support these. Among local studies, the TIPS *Policy Brief Towards a Recovery Programme* (2020), proposes enhanced support for township enterprises, and highlights the plight of “hospitality and recreational services which are highly labour intensive but which will take long to return to their pre-pandemic level even with substantial support.”

Local content discussions have suffered a ‘bad press’ in the wake of the business problems triggered by the SABC’s sudden 2016 move towards a 90% local content requirement. These challenges were a result of poor management and implementation and not necessarily a reflection of problems with increasing local content. Thus ICASA’s earlier proposals for lower, but still majority, local content (70%) would not necessarily have the same negative impacts, particularly if strategically implemented and incrementally phased-in over time, parallel to initiatives to support the production of more broadcast-quality local content.

Calls came from respondents for the establishment of a campaign to promote local content on broadcasting platforms to improve royalty streams to artists and to build audiences for live music events through a national marketing campaign. In particular, a ticket subsidy mechanism was proposed as an audience development tool. Where our research respondents alluded to local content, they were not primarily focused on specific percentages. They but discussed local content in terms of “implementation,” “enforcement”, or “compliance”, because, as one respondent put it: “more play = more pay.”

6.2.4. Exploring and supporting digital potentials

“We will use the online platform but it will not yield the same amount of revenue we are used to. Due to our events, supporters are located in rural communities, which they don’t access the network very well. We push gospel events, only some are [too] old to use live streaming. We by all means try to get them to use it” – Research respondent

The advocacy of support for digital alternatives to live performance covered a diverse range of options: improved and affordable WiFi access in impoverished and rural areas; training in digital and live streaming skills; provision of equipped spaces from which live streaming could be transmitted; support to access digital equipment such as computers; training in digitally-relevant marketing skills; relief funding weighted towards digital alternatives, and more.

The robust emergence from the coding of digital in all its aspects as a desired form of support indicates that role-players in South Africa do not actually lag behind their international counterparts in understanding how the contemporary live music industry works. However, as many comments (of which those reproduced above are representative) also indicate, South Africa’s landscape of inequality makes digital participation harder for many, particularly if they operate outside well-resourced metropolitan areas, or serve audiences who do.

As well as reflecting important societal inequalities, participation constraints also have gender implications. These are important to this research, given the low levels of female participation reflected in the survey. Fewer women than men own smartphones, and UNESCO reported in 2017 that women are four times less likely than men to be fully digitally literate.

Nevertheless, there is close correspondence between the measures proposed by our respondents and those featuring in international practitioner literature. The EU cultural and creative cities report positions a healthy digital infrastructure as a prerequisite for recovery; the Creative Metropoles report advocates universally free Wi-Fi to support cultural participation by both creators and consumers. The UNDP Report *Cultural Policy in the Age of Platforms (UNDP 2016)*^[vi], however, notes that the lack of digital literacy and infrastructure in the global South already prevented consolidation of the markets for digital cultural products there before the COVID crisis, and that the 95% of the app economy – key to activities such as live streaming – was concentrated in ten highly-developed countries. The South African TIPS policy brief on post-COVID reconstruction (Makgetla & Levin, 2020) also proposes improved digital access as an important foundation, including increasing township digital coverage to at least 75%,

and the creation of “platforms for recreational, cultural, educational and skills development services.”^{lvii}

6.2.5. Financial and in-kind relief

Although they ranked third in the coding of qualitative responses (as opposed to first in the quantitative data), financial relief and support instruments were also discussed by respondents. Suggestions were not, however, limited to demands for monetary grants. Instead a wide range of measures – not all requiring direct cash transfers – was described. These included:

- Assistance in generating ticket sales through free advertising of music events on DSAC websites
- Basic income grants, for both creators and music consumers, “so they can come spend money to watch us”
- “Freelance performers can be helped based on prior taxable income and these engagements audited if necessary in the next tax year.”
- Subsidise artists’ fees to relieve the strain on hosting venues
- “Subsidize tickets for independent artists and arts companies (for every ticket sold, the DAC adds a certain amount)”
- “Provide financial support to adapt venues with live streaming equipment for future.”
- “Better support towards amateur musicians and artists to unleash the potential hidden within the communities that’s lost and forgotten. Give everyone a right of making music”
- Lift VAT and other taxes on music and sound equipment
- Provide access to low interest loans for [music industry] venture capital

These practitioner suggestions may seem ambitious in the context of South Africa’s stretched recovery budget, but they again parallel very closely options described in international creative industry literature, which also recommends tax and rate relief measures, incentives and “a particular relief focus” on non-essential sectors including hospitality (UNDP). Florida and Seman propose “direct stipends for artists” modelled on America’s post-Depression Federal Arts Program. The Canadian Sound Diplomacy organisation, in its post-COVID resilience handbook, prescribes a package of measures including community investment in creativity via (especially locally-focused) commissions, and the creation of special purpose vehicles “that retain a small percentage of equity in commissioned works for investment in local cultural policies”.^{lviii}

6.2.6. Interface with government

“The government seems to be completely out of touch with the individuals that make up the arts sector, which does not inspire confidence in their ability to create a suitable economic environment for its continuation.” – Research respondent

As noted in 5.5.2 above, significant concern was expressed by both musicians and other role-players about the quality, efficiency and effectiveness of services provided by government to music practitioners. This ranged from concern about possible corruption to recurring statements that officials simply did not understand the concrete realities of work practices in the industry, leading to the implementation of inappropriate measures, including excessive administrative requirements.

Such concerns were also present in reports from some other international contexts; the Encore report, for example, noted that the UK government had “only looked at the high-end, major performing arts sector – and even that only at a glance.”^{lix} However, it must be noted that this was a more recurrent theme in our respondents’ responses than in international reports. It is underlined by the finding of the OECD in its July 2020 economic survey of South Africa^{lx}, which has noted more generally how the country’s high burden of regulatory requirements presents a barrier to economic activity.

Comments about the interface with government at all levels appeared – sometimes in extremely vehement terms – in multiple responses to different questionnaire items: about why available relief funding was not applied for, why applications were not successful, and what changes and policy steps would be helpful in coping with the COVID crisis. These suggestions may be grouped into four main categories:

- Rooting out corruption at all levels;
- Enhancing the efficiency and effectiveness of services at municipal, provincial and national government level;
- Developing dedicated support units or desks to support the live music business, staffed by personnel who know and understand the industry;
- Improving the efficiency of funding mechanisms, communication, and feedback systems.

The prevalence of such comments and suggestions points to significant scope for improvement in communication between government entities and the live music ecosystem, and recommendations relating to this appear in Section 6.5 below

6.2.7. Differences from international literature: labour conditions and mainstreaming cultural policy

“Provide union-style support to the arts sector, to protect their interests: set minimum basic standards of income on contracts (to protect artists from exploitation), ensure the collection of royalties as well as the prosecution of those who infringe on copyright and offer workplacement programmes as in the trade sectors.” – Research respondent

Proposals appear prominently in much international practitioner literature for more attention to be paid during recovery to the labour conditions of music workers, as well as for cultural policies and spending to be ‘mainstreamed’ into overall planning and budgets, with the arts treated ‘just like any other impacted sector’ (Florida & Seamen, 2020). Strong arguments exist for the mainstreaming approach, since it encourages consideration of arts implications and needs whenever any area of recovery support is discussed. Additionally, this approach acknowledges that cultural activities can contribute positively to societal recovery (*as discussed at 6.4 below*), as well as requiring recovery assistance

However, although both these options did occasionally feature in respondents’ open answers, neither carried anything resembling the weight accorded by South Africans to decentralisation and digital.

Most frequently mentioned were terms related to “an effective musicians union” (in contexts sometimes suggesting that current organisations were not viewed as

effective) and “decent working conditions”. It is worth noting that while the nature of the creative industries fosters project-based working, many aspects of precarity (particularly but not exclusively among service workers, such as venue hospitality staff and “roadies” (equipment-moving staff)) are enforced, not voluntary. Labour conditions also often impact unequally on female music workers. This issue was not an immediate concern for the majority of our respondents – but that does not mean it is unimportant, or that it will not, once the COVID crisis is mitigated, move to the foreground.

As for mainstreaming cultural aspects into all budgets and policy frameworks, that was mentioned by only one respondent. What received more frequent mentions was how the addition of sports to the former DAC portfolio was perceived as overshadowing and working against adequate attention to the crisis faced by arts and culture workers. In that context, placing arts issues within even broader portfolios may not currently attract much favour from music practitioners. And again, once the immediate crisis is over, that attitude may modify.

6.2.8. An unexpected source of resilience: hope

“I am positive about my own career. We managed to turn our business around into an online venture providing online services to festivals wanting to make the change. However, it may be difficult to turn it back again when the live industry “opens up”, so am a bit worried about the consistency of it all. Unfortunately the live music industry was already very dependent on funding (instead of profits) - this dependence has increased [to] a point at where, right now, a live industry hardly exists without this funding - even the streaming one. I am unsure what audience behaviour will look like in the months to come, but hopefully we are able to pick up the pieces and organise successful live events again.” – Research respondent

This research confirmed the findings of SACO’s previous study, that the skilled (and particularly multi-skilled) profile of many cultural practitioners is a source of resilience during the pandemic. It was notable that some respondents reported being able to switch to other income sources such as teaching – although not the majority, these responses nevertheless demonstrated concurrence with the March findings.

Additionally, this research provided significant evidence that live music practitioners, accustomed to working flexibly and at short notice, are able to apply this agility in responding to new circumstances, and that they stay abreast of international trends such as the use of digital platforms. Given that some prevalent stereotypes of music practitioners suggest a lack of business awareness and energy, this is heartening counter-evidence. What is distressing is the number of respondents who understand what they might attempt to survive, but who are not in circumstances where they can access the resources or implement the actions required.

“With no income whatsoever, how am I supposed to stream online?”

“Yes but I’m located in the rural area and my operation currently has one computer and my savings got used up.”

But a final source of resilience emerging from the qualitative data was the amount of hope expressed by respondents, with almost half classifying themselves as ‘optimistic’ about the future, a weighting also reflected in the qualitative data. This stands in sharp

contrast to many international findings. The UK Encore survey for example^{lxii} cited 64% of musicians as contemplating leaving the profession.

The qualitative data, however, qualified the optimism: it was most often expressed in conditional terms: “if” certain developments occur – notably, changes in the responsiveness of government in general and DSAC in particular. This is considered in the recommendations section at 6.5 below.

6.3. Looking outwards: the role of live music and its venues in societal recovery

In a context where cultural activities more broadly have been proposed for a decade as the “Fourth pillar” of sustainable development^{lxiii}, the societal and economic benefits of a flourishing live music industry in particular are well documented in both practitioner research and scholarship. The table below summarises these.

Figure 19: The societal contributions of a live music industry. Source: adapted from CSA 2016

LEVEL	BENEFIT
National	Destination branding
	Tourism revenue
	Music as an export commodity
	Tax revenue
Regional and local	Area branding and identity
	Attracting inward investment
	Cultural spending as contributor to circulating revenue
	Work creation, direct and indirect (services)
	Tax revenue
Society/ Community	Vibrant public sphere
	Builds social and relational capital
	Contributes to area regeneration
	Engine of community identity formation /sense-making
Firm/Enterprise	Enriches knowledge economy: “intellectual multiplier effect”
	Attracts skills to area
	Creates opportunities for partnerships
	Creates opportunities for market share growth and retention
Individual	Contributes to fitness, psychological health & immune response

Additionally, in the four years since the CSA report summarised above, a growing volume of international scholarship has investigated the contribution of the arts to human health: a major concern in the COVID era. This substantial work was surveyed in a recent World Health organisation publication (Fancourt & Finn, 2019)^{lxiii}, which noted that positive health impacts had been very widely observed, including an important role in public health education.

6.4. Recommendations

Based on both qualitative and quantitative data findings, the following recommendations emerge from this research, to support the resilient recovery of live music and its venues from the impact of the COVID pandemic. The research conducted at the start of the lockdown by SACO highlighted very similar findings when examining the types of support requested from government by activity. At that stage, the focus by

respondents was on the short term, and spoke in the main to the need for the support of the DSAC entities and for access to state facilities as live streaming venues.

Just under 6 months later, the conclusions of SACO report reflecting on the qualitative responses from that research have been echoed and outlined with more depth and clarity. The call from the live event sector joins the voices from other activities calling for the “[n]eed to go beyond short-term emergency planning and start thinking about industry sustainability and continuity in the medium and long term as well.”

The live music sector is calling for a package of interventions by all stakeholders to ensure that it can recover from COVID-19 related losses and sustain its growth beyond mere recovery. These proposals include the need for a national approach encompassing all spheres of government and localities, and all portfolios including trade and industry small business development, tourism and local government. In addition, the focus should not just be on one value chain participant but encompass a holistic and diversified approach across the chain, as well as direct support for business innovation and improving the relations between government and the sector.

” The sections below outline these recommendations in more detail

The broader inequalities of the South African context will, of course, continue impact on the effectiveness of any measures. As the UCLG (2020) notes in its #Culture COVID-19 series^{lxiv}, there cannot be a “one-size-fits-all policy...[when not everyone has] the means to pursue and enjoy cultural rights: mobility; taking protective measures; access to English; money.”

6.4.1. Integrated approach

- Develop a national ‘music desk’ (see below) that is better-equipped to work with the entire industry value-chain through inter-departmental co-operation.
- Encourage the development of similar integrated forums at provincial, regional and in particular city levels.

6.4.2. Spaces for live music activities

- Monitor closely the extensive emerging research on the safety aspects and comparative risks of various music activities, to provide clear, timely guidance to both venues and local health authorities.
- Make available, and designate more, officially-controlled spaces – including outdoor spaces – for live music and live streaming activities, including upgrading township community halls and centres.
- Reduce licensing costs and administrative complexities around the use of public and government-controlled spaces for safe performance and recording activities.

6.4.3. Decentralisation

- Decentralise support for music to maximise work and consumption opportunities at the local level in a situation where both travel and mega-scale events are likely to remain risky.
- Create structures to encourage local-level activities not only in performance, but in marketing, audience development and content creation

- Monitor and enforce compliance with existing local content quotas on both national and private broadcast platforms. Research the adequacy of these quotas and the implications of any changes before any policy intervention.

6.4.4. Support for the pivot to digital

- Close the national digital divide by facilitating Wi-Fi access for all South African communities; all host both music-makers and potential audiences
- Facilitate access to spaces, technology, equipment and skills for music livestreaming through grants, purchase loans and training

6.4.5. Administration and disbursement of relief

- Develop funding criteria and processes that can accommodate the actual working and documentation practices of the live music industry.
- Invest in in-kind provisions (eg training, marketing assistance) alongside monetary relief
- View live music as an interrelated system; provide employment support funding along the whole value-chain to avoid situations where one activity cannot take off because of resource constraints or unreadiness in another segment.
- Ease VAT and import duties on all live music-related equipment including instruments
- Implement demand-side measures such as cultural vouchers or ticket subsidies

6.4.6. The interface between government and the sector

- Develop an integrated information portal for all COVID-related measures relevant to the live music sector, irrespective of originating department or sphere of government.
- Standardise information formats and ensure that all information and application documents are both presented in Plain English, and translated into other official languages.
- Undertake further detailed mapping exercises to improve knowledge of the range and diversity of entities serving as venues, to contribute to future policymaking

CASE STUDY SEVEN: RECEPTION ON THE INDUSTRY VALUE CHAIN

PERCY MABANDU – MUSIC WRITER

Freelance writer and artist Percy Mabandu has worked as a journalist for the past decade covering music and the arts. He sees his role as that of a historian whose work locates itself at the intersection of art, jazz and the Black experience. While he is still trying to pursue journalism and writing under lockdown, he has also turned his garage into a studio and focused more on painting. "I'm consistently thinking hard of how to register my own creative output while also acknowledging the great work that I benefit from," he says.

When COVID-19 hit, Mabandu was running a series on the *New Frame* online newspaper platform building up to International Jazz Day, which was abruptly cancelled. He also wrote for other publications including *Destiny Man* and the *Sunday Times*. But once the pandemic

hit and movement was limited, it was impossible to go out and interview. "It mostly was about losing an opportunity to work. No shows meant no reviews and interviews to do," he says. His work prospects were saved in part by the National Arts Festival going digital; daily reviewing for that helped generate income. Other work with *New Frame* was also a lifeline. "I also had to think outside the box about what I pitch ...and think cleverly about who I'm writing for." But with work so scarce, Mabandu cannot afford "to touch anything that's not going to pay me that month. The financial conversation about what rates and when you are going to get paid are much more serious [now and] I'm much more frank."

In the arts, the period between March and May is usually busy, with numerous events including the Cape Town International Jazz Festival (CTIJF) and the build-up to the National Arts Festival to be covered. "Apart from the musical aspect of the [CTIJF] coverage, there's a lot of local and international travel publications that I'd be pitching to because the festival is also a destination event ... These were not possible this year."

As for streamed concerts, Mabandu says, "It also forced me to disconnect. This idea that gigs are to be streamed doesn't vibe with me and I've missed so many. I'm just not moved that way...They felt like we're watching badly produced DVDs." However, he acknowledges that streaming has filled a previous void: "We've often suffered as a country with the documenting of musicians, so then if you think about these as recording sessions, this moment has been great in that way. In terms of forcing us to start documenting much more deliberately musical ideas, I think this will help."

In future, he thinks, platforms like the National Arts Festival should continue digital working to be accessible to an international audience, and maintain their physical platform. Mabandu believes the way the pandemic has forced innovative thinking may have positive outcomes. "The energy now is one of ingenuity. Those who fail to be creative in how they think about livelihoods are going to die out. This is also what I'm understanding about myself. I'm thinking hard about building my own platform and value chain, in the next couple of months," Mabandu is considering podcasts and other ways to expose his work.

"I'm wary of the power structure remaining the same. I think we have to break the wheel. I'd love to see musicians take better control of their work and not leave it too much to promoters who have historically exploited them"

One way to bounce back, he says is, "kick down the doors of theatres,". The national state theatres, for example, could be used as regular performance spaces for musicians, and thus aid with a national touring circuit. "I have a dream where creatives think less about the government when it comes to making their way. The government does not know what to do with the arts and performance sector. They have not a single idea. It's sad but evident. I think the corporate sector needs to be brought to the party more competitively."

CHAPTER SEVEN: RECOMMENDATIONS FOR FUTURE STUDIES

We would therefore recommend:

7.1. Supplementary own-language research.

That to reach into particularly South Africa's many traditional music communities, the survey be translated into a selection of official languages other than English and disseminated via non-online channels (possibly via provincial Departments of Arts, Culture and Heritage). For this exercise, researchers fluent in the languages concerned should be utilised, and a translation of findings into English be produced, so that this report and any ensuing policy are supplemented by information not previously accessible;

7.2. Post-publication focus groups.

That as soon as gathering and travel restrictions, and health risks, are sufficiently reduced, a series of focus group meetings on findings and recommendations is conducted;

7.3. A 12-month follow-up survey.

Because the impact of COVID on live music remains in-process, that a follow-up survey be undertaken in September 2021, covering not only continuing impact, but also the success and viability of recovery and resilience measures, particularly live streaming where take-up and hopes were both extremely high.

7.4. Enhanced support for live music industry mapping, especially but not exclusively outside metropolitan areas.

Evidence in this report of the non-formal music circuits which sustain gospel and traditional music in South Africa, the rich provincial jazz scene nurtured by the Eastern Cape Department of Arts and Culture, and multiple other live performance activities and their value chains are as much part of South Africa's live music ecosystem as the predominantly if not exclusively metropolitan operations discussed here. But if researchers cannot access their contacts, they cannot form part of research. We would therefore recommend that national DSAC and provincial departments support researchers in extending the basic mapping of the scene and its role-players, so that information about it can feed into policy decisions.

7.5. Further research into gender aspects of the live music ecosystem.

Information is lacking about the factors that may constrain women and other gender identifications from participating on an equal basis in the live music value chain. International reports^{lxv}, and some South African scholarly studies^{lxvi}, suggest that gender-based exclusion, harassment and violence play a significant part – and that, as one example, it requires 30% of an instrumental class to be female before women students see themselves as confident participants in that space. UK booking organisation Encore, in its COVID impact survey^{lxvii} of 560 respondents, noted that pandemic-related cancellations had especially impacted on young female performers. These questions and findings were outside the direct mandate of this research, but

clearly point to an important direction for future inquiry, particularly given South Africa's constitutional commitment to gender equality.

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APPENDIX A: THE RESEARCH INSTRUMENTS

THE QUESTIONNAIRE:

Impact Analysis: Live-Music Venues and the South African economy in the context of COVID-19

It's vital for all businesses in the South African music sector to find out how the State of Disaster in response to the COVID-19 Coronavirus is affecting the sector. This study follows on earlier impact studies: *SACO Cultural and Creative Sector Business Responses to COVID-19 Survey and Study*, the Music in Africa *COVID-19 Impact Study* and Akum Agency's *Survey on loss of artist revenue*. When these were conducted the pandemic was just beginning. It has been a few months since these studies and we can now better assess the immediate and longer-term impact on the sector, and look towards solutions towards the sector's recovery.

This survey is being run by IKS Cultural Consulting with the South African Cultural Observatory (SACO) and the Concerts SA project (CSA).

1. Context

We know South Africa's cultural and creative industries have high potential for work creation and revenue generation and can build identity and solidarity. But the past few months have shown how vulnerable our sector is, and how precarious its revenue streams are, in part due to the sector's mainly informal and project-based modes of activity. Music, as part of the performing arts in general, has been hard-hit by pandemic lockdowns and the subsequent weakened economy's impact on business and personal life. So we're seeking the insights and experiences of firms (employers in the live-music business) and individual freelancers from any part of the music business, formal or informal.

2. How to use this questionnaire What will happen to my answers?

- The survey is voluntary and anonymous – the information you provide will not be linked to you or your firm and conforms to South African privacy laws.
- The research will be made available to the Department of Sport, Arts and Culture (who fund the Cultural Observatory), IKS Cultural Consulting, Concerts SA, and the SAMRO Foundation.
- The final research will be made available on the websites of the SA Cultural Observatory, IKS Cultural Consulting, Concerts SA, and Music in Africa; and will provide information for other writing and research on this topic.

Do I have to answer every question?

While we would appreciate as much input from you as possible, you do not have to answer every question, and can leave any questions you don't want to answer blank.

Structure of this survey:

- This survey has three sections.
 - Section A (Questions 1 - 6) is for everybody;
 - Section B (Questions 7 - 8) is for all employers (whether formally registered as businesses or not);
 - Section C (Questions 9 – 10) are for formally registered businesses only.

1. Given this information, are you happy to proceed with the survey? [*Required answer]

- ☐ Yes: Thank you! Please answer the questions below as fully as possible
- ☐ No: Thank you for your time. Please close this web page.

3. Definitions - please keep the following definitions in mind when you answer

(Drop down menu) All these roles, in various combinations, contribute to making live-music happen.

⁵Artist - The performer or performers that people attend live-music events to see

Venue - Any location where live-music events occur. The location may be 100% dedicated to presenting live-music, or may combine live-music with restaurant/bar/catering services, hosting of community events, or presenting non-musical performances.

Venue staff - Any employee of a venue, from caterers and bar staff to security and administrative staff, contribute to, and earn from live-music events. Venue staff may share responsibilities relating to the event's promotion, selling tickets, production stage management, and ensuring audience safety/ satisfaction, or these may be outsourced.

Independent music service professionals – Temporary service providers employed by a venue or artist to provide specialised skills and facilities, including but not limited to: sound; lighting; videoing; transport; or costume and makeup.

Independent event promoter – Independent promoters book artists, are responsible for marketing and promoting the concert, and select venues. Sometimes there's a blurred line between event promoters and the in-house teams of venues.

Artist manager - An artist manager or management team responsible for creating opportunities for artist and may also serve as booking agent and tour manager.

Booking agent - Agent or agency responsible for manage live events by liaising between the artists and event promoters to select suitable venues. Their duties can range from negotiating payment and arranging technical set-up for the live-music event to securing hospitality, travel, and other logistical matters for the artist.

Sponsor - A company who contributes towards a live-music event by providing media platforms, financial assistance, advertising material or other support in return for publicity for their brand.

Music Publisher – A company responsible for handling music copyright when it is performed, recorded or filmed, and administers copyright revenue on these aspects

Record label – A record label, or record company, is a brand or trademark of music recordings and music videos, or the company that owns it. Sometimes, a record label is also a publishing company that manages such brands and trademarks, coordinates the production, manufacture, distribution, marketing, promotion, and enforcement of copyright for sound recordings and music videos, while also conducting talent scouting and development of new artists.

SECTION A: About you and your music-related work – please complete this

1a. In which part of the live-music sector do you mostly work, i.e. spend more than half your live-music related activities. Please tick one: (if you want clarity refer to 3. Definitions above)

- ☐ Venue owner
- ☐ Artist
- ☐ Venue staff
- ☐ Independent music services professional
- ☐ Independent Promoter
- ☐ Artist Manager
- ☐ Booking agent
- ☐ Sponsor
- ☐ Record label if active in live-music
- ☐ Music publisher
- ☐ Other: please tell us more

1b. Which of the below are you? (tick one)

- ☐ An employer
 - If an employer, are you're the majority of your employees ☐
 - Full-time wage workers?
- ☐ Part-time wage workers?
- ☐ Freelancers engaged for single events?
- ☐ A freelancer (own account worker with no employees)

1c. How long have you been engaged in your current occupation or running your current business? (tick one) ☐

- Less than 1 year
- ☐ 1-2 years
- ☐ Over 2 years
- ☐ 3-5 years
- ☐ Over 5 years

1d. Is your business (tick one)

- ☐ Registered (operating in the formal sector)
- ☐ Unregistered (operating informally)

1f. Where are you based/ where is the head office of your business? (tick one)

Gauteng		Free State	
Limpopo		North West	
Mpumalanga		Northern Cape	
KZN		Western Cape	
Eastern Cape			

2. As a result of the COVID-19 lockdown and restrictions, have you experienced any cancellation or indefinite postponement of work that was to take place?

- ☐ Yes
☐ No

If 'no', skip to Question 3 | If yes please complete question 2a – 2f.

2a. What was the financial value of these cancellations or postponements in terms of your projected activities before 31 December 2020? (tick one)

- ☐ Less than a quarter of my projected 2020 income
☐ Between a quarter and a half of my projected 2020 income
☐ Between half and three-quarters of my projected 2020 income
☐ Between three-quarters and all of my projected 2020 income Please tell us more:

2b. What kind of revenue did you lose? (tick as many as apply)

- ☐ Agreed fee from a formally confirmed engagement: South Africa
☐ Agreed fee from a formally confirmed engagement: international
☐ Share of door takings from a formally confirmed engagement
☐ Revenue-in-kind (professional networking and showcasing opportunities)
☐ Revenue from event ticket sales
☐ Revenue from bar sales
☐ Revenue from food sales
☐ Wages from providing services to a live-music event
☐ Tips from providing services to a live-music event (bar, food staff, door security)
☐ Unredeemable investment in pre-engagement preparation (eg rehearsal, composing/arranging time, wear & tear on equipment, commissioning costumes, effects, stage-sets) ☐ Other – tell us more

2c. In a normal year, how far ahead are you able to plan most (more than 50%) of your music-related activities? (tick one)

- ☐ A year or more ahead
☐ 6-12 months ahead
☐ 3-6 months ahead
☐ 1-3 months ahead
☐ Less than a month ahead

Tell us more:

2d. How many other people professionally connected to your music-related work were impacted by this revenue loss? (tick one)

- ☐ Under 5
☐ 6-10
☐ 11-20
☐ between 21 – 49
☐ Over 50

2e. Who were these affected people? (tick as many as apply)

- ☐ Performers
☐ Specialist support (sound, lights, recording)
☐ General support (transporters/roadies, venue staff) ☐ Suppliers (equipment, costume etc hire)

Other (please tell us more) Insert Text Here

2f. How many people in your household/family depend on your income from live-music? Insert number here 3.
 Do you think you (and any employees, if you have them) will be able to continue working during the COVID-19 crisis? (tick one option)

- ☐ I can probably continue with more than 75% of my activities
☐ I can probably continue with 51% - 75% of my activities
☐ I can probably continue with about 50% of my activities
☐ I can probably continue with 25-49% of my activities ☐ I can probably continue with under 25% of my activities ☐ I cannot continue with any of my activities.

4. Are you using or planning to use any the following strategies to keep your music-related work going? (tick as many as you like, and/or add your own)

- ☐ moving business activities (eg meetings and production) online

- ☐ implementing greater flexibility to work from home
- ☐ agreeing with clients to postpone (but not cancel) work until a future date
- ☐ working on aspects (eg practising, archiving, administration, developing creative ideas) that don't require face-to-face interaction
- ☐ using the time to up-skill or train myself and/or my employees
- ☐ using up my reserves or savings
- ☐ selling equipment and assets
- ☐ entering business rescue
- ☐ applying for a new loan or an extension of a current loan
- ☐ seeking support (money or other services) from friends and family
- ☐ seeking support from other agencies or organisations
- ☐ unable to use any strategies to continue with my business
- ☐ leaving the music business
- ☐ Using other strategies. Tell us more below:

4a. Have you considered putting more effort into work related to online music such as pre-recording and/or livestreaming?

- ☐ Yes
- ☐ No

If no, why is this? (tick as many as apply)

- ☐ It's not relevant to my role in the music industry
- ☐ I can't access the right equipment or other resources
- ☐ I don't have the right skills or knowledge
- ☐ Other reasons (tell us more)

4b. How far ahead are you planning in relation to all these strategies?

- ☐ 6 months or less
- ☐ 7-12 months
- ☐ More than 12 months

Please tell us more:

4c. Do you know about the COVID-19 relief offered by the Department of Sports, Arts and Culture specifically to the arts?

- ☐ Yes
- ☐ No
- ☐ Unsure

If yes:

4d. Did you apply for this SMME relief?

- ☐ Yes
- ☐ No

4e. If not, please briefly tell us why:

Insert Text Here

4f. Was your application successful?

- ☐ Yes
- ☐ No

4g. If not successful, please tell us what you think or were told the reason was:

Insert Text Here

5. If your occupation or business qualified, which of the following kinds of government support would be useful to you? (tick as many as you like)

- ☐ Low interest loans or bridging finance
- ☐ Deferment of tax
- ☐ Reduction of VAT on essential working equipment (eg instruments, sound/recording gear)
- ☐ Relief from paying employee UIF contributions
- ☐ Access to government facilities (eg state theatres, community centres) to create live streamed music programmes
- ☐ Financial support from DSAC entities
- ☐ Non-financial support, such as management/ legal advice, skills upgrade training and loan application assistance

5a. Are there other specific kinds of support that your occupation or business could use to change direction or survive? If so, please tell us about them:

6. Please share with us how you are feeling about the future of your own career/business and the future of live-music more generally: Insert Text Here

THANK YOU! IF YOU ARE NOT A REGISTERED BUSINESS OR AN EMPLOYER, YOU'VE FINISHED THE QUESTIONNAIRE. We will make the results available to you as soon as possible via the SA Cultural Observatory,. YOU CAN LEAVE THE WEB PAGE NOW.
IF YOU ARE AN EMPLOYER OR A BUSINESS WE'D LIKE YOUR HELP WITH A FEW MORE ANSWERS. PLEASE READ ON

SECTION B. THE NEXT TWO QUESTIONS ARE FOR ALL EMPLOYERS (REGISTERED OR UNREGISTERED).

7. Did you need to use any of the following strategies from April 2020 to date to keep your business going? (tick as many as apply)
- ☐ Selling assets or equipment
 - ☐ Retrenching employees
 - ☐ Ending the employment of short-term/contract/informal employees
 - ☐ Restructuring your business
 - ☐ Reducing the salaries of employees
 - ☐ Reducing the number of paid hours that employees work
 - ☐ Reducing the scale of my operations
 - ☐ Asking employees to take paid leave
 - ☐ Asking employees to take unpaid leave
 - ☐ Reducing employment benefits offered
 - ☐ In business rescue
 - ☐ None of these apply: I am continuing to pay all employees their normal salary. ☐ Other strategies (please tell us more below):

8. If you are an employer who's been operating for more than 1 year, approximately how many people did you employ in financial year 2019/20? (Complete all categories that apply)
- _____ full-time waged employees
 - _____ part-time waged employees
 - _____ intermittent freelancers

If it's more complicated than this, please tell us more:

IF YOU ARE AN EMPLOYER BUT NOT A REGISTERED BUSINESS, YOU'VE FINISHED THE QUESTIONNAIRE. THANK YOU FOR PARTICIPATING, YOU CAN LEAVE THE WEB PAGE NOW. We will make the results available to you as soon as possible via the SA Cultural Observatory,.

IF YOU ARE A REGISTERED BUSINESS, PLEASE CONTINUE.

SECTION C. THE FINAL TWO QUESTIONS ARE FOR REGISTERED BUSINESSES ONLY. RESULTS ARE ANONYMOUS AND THIS INFORMATION WILL NOT BE CONNECTED TO YOU OR YOUR FIRM

9. Please indicate your average annual turnover category for the past year three years (*Turnover is the total value of revenue you made in the last financial year or your total takings before expenses and taxes are deducted*)
- Less than R5million (micro)
 - Between R5 million and less than R15 million (small)
 - Between R15 million and less than R40 million (medium)
 - More than R40 million (large)

9a. If you have not been registered as a business for as long as three years, please indicate your average annual turnover during the time you have been in business _____ ZAR 9b. What was your turnover for financial year 2019/2020 in Rands?

- R _____

10. Do you know about the SA government support available for small, medium and micro enterprises?

- ☐ Yes
- ☐ No
- ☐ Unsure

If yes:

- 10a. Did you apply for this SMME relief?

- ☐ Yes
- ☐ No

10b. If not, please briefly tell us why:

Insert Text Here

- 10c. Was your application successful?

- ☐ Yes
- ☐ No

10d. If not successful, please tell us what you think or were told the reason was: Insert Text Here

YOU'VE FINISHED! THANK YOU FOR COMPLETING THE SURVEY. We will make the results available to you as soon as possible via the SA Cultural Observatory, Concerts SA and IKS websites:

<https://www.southafricanculturalobservatory.org.za/> <https://www.concertssa.co.za/> <https://www.iksafrika.com/>

If you know of others in the live-music sector who would be willing to complete the survey, please feel free to forward them this link.

GUIDANCE NOTES FOR CASE STUDY INTERVIEWERS

The main survey research maps along the music industry value chain at the bottom of this document. The following questions parallel aspects of the questionnaire, but with room for much more texture & nuance. You are free to word the questions to suit your own natural expression but should be careful to ensure the aspects outlined below are adequately probed.

Please ensure that you preface the conversation with an introduction covering the following points:

- This is part of a research project exploring the impact of COVID on South African live music and its venues, being conducted for the South African Cultural Observatory based at Nelson Mandela University. It supplements a much longer mail-in survey.
- The information will be used only for purposes related to the research, will be kept securely, and will be retained only for as long as research purposes require.
- Your participation is voluntary and you are free to withdraw from this conversation at any time
☐ Please let us know if you wish anything you say to be kept 'off the record' or used as 'background only'. We will respect your wishes.

If the interviewee needs more information before or after talking to you, please provide them with the contact details of Andre le Roux at IKS Cultural Consulting.

1) Talk about what the period March-May is normally (ie pre-COVID) like in your live music-related working life: ☐ Activities?

- Earnings? *(amounts if they are willing – but descriptions like “getting by” or “just about paying bills” will suffice if they aren’t)*
- Would you be creating work opportunities for others as part of your activities? Details?
- How far would this work be predictable/ manageable, and how far arising from opportunities that happened unexpectedly/at very short notice?

2) By comparison, talk about March-May 2020 under lockdown. What work opportunities did you and any people who work with you lose? Talk about the feelings and atmosphere in your working life during this time....

Try & get concrete details here: descriptions of eg what a busy day last year would actually involve the interviewee in doing; who they’d interact with etc and how all that has changed.

3) How has this impacted/ will this impact on your ability to carry on with your live music related activities? *(Again, seek concrete detail)*

4) How do you feel about what has happened and about the future of SA live music post-COVID? *(This is an opportunity for the interviewee to express attitudes)*

4a) Why do you think these impacts of COVID matter? *(for them personally & society/community/history/ broader aspects of life)?*

5) Are there any changes that would make you feel more optimistic for post-COVID recovery?

(Things govt – or any other agency or stakeholder – could do to change the climate for live music going forward; things they themselves are thinking of trying/ doing/ changing...)

Thank you. We will let you know when the research is published and how you can access it.

ENDNOTES

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- ^{vi} Fancourt, D., & Finn, S., WHO Health Evidence Impact Report #67: *What is the evidence on the role of arts in improving health and wellbeing?* ^{vii} UNESCO 2008 *Creative Economy Report*
- ^{viii} CSA 2013 *Song Lines: Mapping the South African Live Performance Landscape* ^{ix} UNDP SA, 2020; *COVID-19 in South Africa: socio-economic impact assessment July 2020*
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- ^{xlv} *ibid* ^{xlvi} *ibid*. ^{xlvii} WEF 2020 op.cit. ^{xlviii} see, for example <https://www.voanews.com/africa/south-africa-gospel-music-reigns-supreme> accessed 24/08/20 ^{xlix} Florida & Seman 2020 op.cit
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