SECTOR SKILLS PLAN 2017/2018

higher education & training

Department
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

cathsseta

SECTOR SKILLS PLAN
2017/2018

To obtain additional copies of this document please contact:

Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority
Office of the Administrator
1 Newtown Avenue, Ground Floor, Killarney, Johannesburg

Tel: 011 217 0600
E-mail: info@cathsseta.org.za
Website: www.cathsseta.org.za

FOREWORD

I have the pleasure of presenting the Sector Skills Plan (SSP) for the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) for the 2017/2018 financial year. In October 2015, the Department of Higher Education and Training (DHET) extended the organisation's administration period for a further one year, allowing the organisation to continue stabilizing operations, whilst pursuing improved stakeholder relations and enhancing service accessibility by extending our physical footprint to six provinces. Integral to the update of this SSP has been the contribution from the Joint Working Committee (JWC), who have provided support to me as the Administrator, and serve as industry experts that fulfil an advisory role on sector specific issues and interests.

In order to ensure collection of credible and reliable labour market information for skills needs analysis and planning, CATHSSETA has commissioned different research projects, the outputs of which inform this SSP update. One of these research projects, undertaken in partnership with the National Department of Tourism (NDT) attests to our commitment to prioritise working together with relevant partners in addressing the skills needs of the sector. In addition, an impact assessment study, is currently underway, into the CATHSSETA learning programmes implemented during the National Skills Development Strategy (NSDS) III period which will provide us with valuable insight on the impact of training on beneficiaries and employers.

As we continue pursuing the goals of the (NSDS) III which has been extended to end in March 2018, this SSP 2017/2018 builds on the foundation laid from the last period's SSP. This SSP has been prepared by our Research Unit in consultation with the regions and the JWC members. Industry consultation sessions, as part of our research projects, have been held in Gauteng, the Western Cape and KwaZulu-Natal, covering all six sub-sectors falling within the CATHSSETA scope. The outcomes of such consultations have been incorporated into this SSP. Further key informant interviews and focus group sessions have been planned and these outcomes will be incorporated in the next update of the SSP.

Skills planning seeks to identify opportunities and platforms in the sector within which meaningful training can take place. This SSP will form the basis for all SETA plans including the Strategic Plan (SP), Annual Performance Plan (APP) and funding framework that will guide the use of skills development grants.

In conclusion, I would like to thank both the JWC members and our stakeholders for their valuable participation and contribution to this SSP update process. CATHSSETA will seek to leverage these engagements to further our positive contribution to society in the future.

Pumzile E Kedama (Mr.)
The Administrator: Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority

AUTHORISATION OF THE SECTOR SKILLS PLAN

I, the undersigned, hereby approve, on behalf of the CULTURE, ARTS, TOURISM, HOSPITALITY AND SPORT SECTOR EDUCATION AND TRAINING AUTHORITY (CATHSSETA), the contents of the Sector Skills Plan for the period 2017/2018.

Approved By:

Signature:

____

Pumzile E Kedama (Mr.)
The Administrator

Date: ________________

ACRONYMS & ABBREVIATIONS

ACH	Arts, Culture and Heritage
AET	Adult Education and Training
APP	Annual Performance Plan
ATR	Annual Performance
CATHSSETA	Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority
CJI	Career Junction Index
CONS	Conservation
DAC	Department of Arts and Culture
DEA	Department of Environmental Affairs
DHET	Department of Higher Education and Training
DG	Discretionary Grant
FETC	Further Education and Training Certificate
FET	Further Education and Training
GDP	Gross Domestic Product
G&L	Gaming and Lotteries
HEI	Higher Education Institution
HEMIS	Higher Education Management Information System
HOSP	Hospitality
ICT	Information Communication and Technology
IPAP	Industrial Policy Action Plan
LGSETA	Local Government Sector Education and Training Authority
MG	Mandatory Grant
MOU	Memorandum of Understanding
NCV	National Certificate Vocational
NDP	National Development Plan
NDT	National Department of Tourism
NEDLAC	National Economic Development and Labour Council
NGB	National Gambling Board
NQF	National Qualifications Framework
NSDS	National Skills Development Strategy
NSF	National Skills Fund
NSRP	National Sport and Recreation Plan
NTCE	National Tourism Careers Expo
NTSS	National Tourism Sector Strategy
OD-ETDP	Occupational Directed-Education Training and Development Practice
OFO	Organising Framework for Occupations
PIVOTAL	Professional, Vocational, Occupational, Technical & Academic Learning
PSETA	Public Sector Education and Training Authority
QCTO	Quality Council for Trades and Occupations
QMR	Quarterly Monitoring Report
ROI	Return On Investment

RPL	Recognition of Prior Learning
SANBI	South African National Biodiversity Institute
SANParks	South African National Parks
SAQA	South African Qualifications Authority
SASCOC	South African Sports Confederation and Olympic Committee
SAT	South African Tourism
SETA	Sector Education and Training Authority
SIC	Standard Industrial Classification
SIPs	Strategic Integrated Projects
SMME	Small Medium Micro Enterprises
SMS	SETA Management System
SRF	Sport, Recreation and Fitness
SRSA	Sports and Recreation South Africa
SP	Strategic Plan
SSP	Sector Skills Plan
T&T	Travel and Tourism
TSA	Tourism Satellite Account
TVET	Technical and Vocational Education and Training
UoT	University of Technology
WSP	Workplace Skills Plan
WTTC	World Travel and Tourism Council

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

EXECUTIVE SUMMARY

The Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) has compiled this annual update of the Sector Skills Plan (SSP) for the period 2017/2018. This SSP has been prepared in accordance with the guidelines included in the National Skills Development Strategy (NSDS) III, as well as the requirements set out by the Department of Higher Education and Training (DHET) SSP Framework and Requirements. The key policy drivers that have been identified and considered in this SSP are the National Development Plan (NDP), the White Paper for Post School Education and Training, the Sector Education and Training (SETA) Grant Regulations and NSDS III. Further sub-sectoral specific plans considered include the Department of Arts and Culture (DAC) Strategy, the National Sport and Recreation Plan (NSRP), the National Tourism Sector Strategy (NTSS), the Tourism Act of 2014 and the Department of Environmental Affairs (DEA) Strategy.

The overall sector which includes the Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness; and Travel and Tourism sub-sectors represents an extremely vast and varied sector in terms of nature, scope and size. The geographical profile of the sector indicating a greater concentration of employers and employees in the Gauteng, Western Cape and KwaZulu-Natal provinces remains the status quo. This, along with the race and gender breakdown of employees in the sector which indicates that Black Africans and females are still absent from higher level occupations, particularly at the professional and management levels, suggests that the overall working population profile of the sector remains unchanged.

A range of data and information sources have been used for the analysis conducted and the results presented in this SSP. These sources include the CATHSSETA Mandatory Grant data (which was previously the Workplace Skills Plan and Annual Training Report); data and publications from Statistics South Africa, the Higher Education Management Information System (HEMIS) and industry regulators and entities such as the National Gambling Board (NGB) and South African Tourism (SAT). Additional information from industry publications and online job portals were reviewed. Focus group sessions as part of our research projects were held with key stakeholders to elicit further input into the SSP. During the development of this SSP, joint working committee members from each of the CATHSSETA sub-sectors were consulted for input.

The CATHSSETA list of scarce skills consists of 32 occupations. The analysis of the demand and supply of skills within the sector has been assessed utilising the Mandatory grant application data and inputs from focus group discussions with stakeholders engaged in the sector. The analysis and interpretation of these consolidated inputs are further enhanced with the research conducted by CATHSSETA and its partners. The data analysis was conducted in the following manner (a) data was checked and validated and missing values were identified and addressed; (b) validated data was organised for exploratory analysis; (c) descriptive statistics were produced including mean, standard deviation and minimum and maximum values for identified variables; (d) categorical data was used to conduct qualitative analysis; (e) use of historical data derived from analysis of previous period’s Reported and Planned Training Interventions data; (f) analysed data has been presented as tables, graphs and summary statistics and (g) trend analysis based on historical data combined with chamber and consultation inputs for comparison across different categories and over various time periods.

Recognition of priority skills are founded on the occupations identified as scarce skills. The identified scarce skills are a function of two determinants; the number of vacancies in the sector and the degree of scarcity of the identified vacancies. This function was developed on the basis of the behavioural relationship between vacancies and scarcity, to scarce skills. Demand estimates were calculated through time-series forecasts that use the time-ordered sequence of historical observations on a variable to develop a model for predicting future values of that variable. The simplest time-series forecast was a linear trend forecast where the generating process was assumed to be the linear model:

$$t_i = t_0 + a\% \times i_i$$

whereby t_i = future value of skills demand; t_0 = skills demand at time 0; i = [1,2] and a= average percentage increase (best fit).

Utilising the triangulation methodology for corroborating findings and as a test for validity, the occupations identified as scarce skills are further subject to consultation with sector stakeholders. Occupations identified as scarce in the previous five years are also considered prior to the final list of scarce skills being generated.

The sub-sectors within CATHSSETA are forecasted to experience continued strong growth in the years to come. To support the industry's success, and facilitate this projected growth, industry must work together to ensure we have access to suitable skilled labour. Appropriately skilled, quality employees are integral to the continued growth of the CATHSSETA sector. This combined with the current analysis contained in this SSP contribute to the following most critical skills development priorities in the sector:

- Qualification review
- Training provision
- Analysis of skills needs
- Work experience and experiential learning
- TVET capacity building
- Increased partnerships
- Transformation in the sector

In order to address the above seven skills priorities, CATHSSETA has formed strategic partnerships with Higher Education Institutions (HEIs), Technical and Vocational Education and Training (TVET) Colleges, employers, research partners and other public entities, details of which have been outlined in chapter four.

CATHSSETA, through the implementation of the seven Key Developmental and Transformational Imperatives in its interventions are encouraging and driving transformation in the sector. In an effort to focus on efficient and effective service delivery of the SETA throughout the country and addressing the skills needs and the skills development priorities of the sector, CATHSSETA in the 2016/2017 financial year has expanded its operational presence to six different regions across the country, thus ensuring accessibility to all stakeholders.

STRUCTURE OF THE SSP

The SSP contains five chapters. Chapter 1 presents the profile of the sector and examines the six sub-sectors in terms of scope, economic performance, employee profile and labour market profile. Chapter 2 is concerned with identifying factors that are driving change in the sector and their implications for skills. Chapter 3 considers the demand and supply of skills and concludes with the identification of the top 10 PIVOTAL list, scarce and critical skills in the sector. Chapter 4 provides an outline of the partnerships that CATHSSETA currently has in place and the new partnerships being explored for the sector. The final section of this SSP, chapter 5, summarises the key findings from the previous chapters and identifies and discusses the skills priorities for the sector.

RESEARCH PROCESS AND METHODS

This section details the research process and methods CATHSSETA has utilised, the findings of which inform the Sector Skills Plan. The process entails conducting primary research and consulting secondary sources for relevant data. The SETA is currently conducting three primary research studies, namely a Labour Market analysis, an Impact assessment study, and a Skills Audit. In addition, the SETA will conduct interviews with key informants within the sub-sectors. The details of each study are provided in the table below.

Table 1: Research process and methods

Vacancy analysis	Skills Audit	Labour market analysis	Impact assess-ment	Type of study
Current and future vacancies, establish difficult to fill vacancies and occupations	Skills Audit of the Tourism, Arts, Culture and Heritage, Hospitality, and Conservation sub-sectors	Labour market analysis of the Gaming & Lotteries, Arts, Culture & Heritage, and Sport, Recreation & Fitness sub-sectors	Impact Assessment of CATHSSETA learning programmes	**Topic**
Qualitative methods	Qualitative and quantitative methods	Qualitative and quantitative methods	Qualitative and quantitative methods	**Nature (Design) of the study**
To collect information from employers on current and future skills needs as well as skills development initiatives	To identify skills gaps and key drivers of change for the Tourism sector, and define priorities,	To identify current vacancies, difficult to fill vacancies, establish trends in the sub-sectors, and understand factors driving the demand for skills e.g. migration	To develop an appropriate impact assessment tool and evaluate the impact of Learnership and internship programmes	**Objectives of study**
Qualitative: Interview guide; method – key informant interviews	Quantitative: Online questionnaire; method - survey Qualitative: workshop guide and interview guide; method - in depth interviews and workshops	Quantitative: Survey questionnaire; method - survey Qualitative: Interview guide and workshop guide; method - in depth interviews and workshops	Quantitative: Survey questionnaire; method - survey Qualitative: Interview guide and focus group guide; method – In depth interviews and focus group discussions	**Data collection tool**
Convenience sample drawn for CATHSSETA's database of levy-payers.	170 organisations within Travel and Tourism, Hospitality, Conservation, and Arts, Culture and Heritage	Convenience sample drawn from CATHSSETA's databases (QMR and WSP/ATR data)	Sample size: 300 surveys, 180 interviews and focus groups Scope: Learnership and Internship graduates from 2011 to Q3 2015	**Sample size and scope of the study**
CATHSSETA stakeholder database	170 organisations within Travel and Tourism, Hospitality, Conservation, and Arts, Culture and Heritage	Various including QMR data, WSP/ATR data, Quarterly Labour Force Studies, Publications, Economic reports and outlooks	Quarterly Monitoring Report (QMR) for the 2011 to 2015 (in quarter 3)	**List of data sources and data sets**
June to August 2016	October 2015 to June 2016	March to June 2016	February to June 2016	**Time frame of the study**

There is currently no single database for the CATHSSETA sector which provides a complete profile of the sector as per the 62 Standard Industrial Classification (SIC) codes in CATHSSETA's scope. Thus, a range of data sources have been used in developing this SSP. The five sources are as follows:

1. The SETA Management System (SMS) is an electronic data management tool used for capturing applications (e.g. Mandatory Grants), certification, and registration of qualifications, learners and Skills Development Facilitators. It also serves as a data storage and reporting facility.
2. Mandatory Grant applications provide data on sector employment, demographic and occupational profiles of employees per sub-sector. The total Mandatory Grant applications submitted in the 2016 period amounted to 1 270. These 1 270 employers represent 20% of the levy paying entities in the sector. A recognised limitation of the sector is the lack of data on employers and employees and efforts to address this limitation are currently underway by conducting surveys to collect further data. Data for the Mandatory Grant was collected based on the Organising Framework for Occupations (OFO) version 2015.
3. National data sources include the Tourism Satellite Account (TSA) published by Statistics South Africa, the Higher Education Management Information System (HEMIS) maintained by the DHET, publications and reports by the DHET, World Travel and Tourism Council, National Gambling Board, South African Tourism, the Career Junction Index and research conducted by other government departments, national research institutions and industry publications.
4. CATHSSETA through partnerships with relevant Government Departments in the sector, and through the appointment of service providers planned and implemented various research projects to ensure that there is sufficient data on the sector to conduct an accurate labour market and skills needs analysis. These projects include research grants to Universities to conduct research into better understanding the size, employment and economic contributions of the six sub-sectors, research colloquiums per sub-sector aimed at providing a platform for interaction and review of sector specific research and an impact assessment study.
5. Industry participation and consultation was also undertaken in the form of joint working committees and focus group sessions conducted with key sector stakeholders as part of the research projects. Joint working committee members and regional managers provided input into this SSP, engaged with their stakeholders and provided access to sub-sector specific information.

CHAPTER 1
SECTOR PROFILE

CHAPTER 1: SECTOR PROFILE

1.1. Introduction

This chapter focuses on the composition of the sector with the aim of providing a profile in terms of size, coverage and economic performance. The chapter is organised into five main sections:

- Scope of coverage
- Key role-players
- Economic performance
- Employer profile
- Labour market profile

1.2. Scope Of Coverage

The scope of a SETA is based on the Standard Industrial Classification of all Economic Activities (SIC) codes. The SETA landscape for NSDS III is described in the Government Gazette of November 2010 and placed 62 SIC codes in CATHSSETA's scope. CATHSSETA has clustered the SIC codes in its scope into six logical areas. The sub-sectors are Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness: and Tourism and Travel Services. All of these sectors fall within the broader services sector of the economy.

There is a heavy dependence on donor funding and volunteerism within some of the sub-sectors, with the exception of the Gaming & Lotteries and Hospitality sub-sectors. Seasonality and job instability combined with low-pay, long working hours and lack of clear career paths are some of the characteristics of the sector. In general, the majority of employees within the sector are youth and jobs in the sector are often seen as transition jobs.

The Arts, Culture and Heritage (ACH) sub-sector consists of production of arts, crafts designer goods and souvenirs, casting for film, television and theatre, dramatic arts, entertainment, museum activities, monuments and the preservation of historical sites and buildings, management and operation of museums, cultural and heritage activities, music and theatre, as well as arts councils and their activities.

The Conservation (CONS) sub-sector includes hunting & trapping, activities of conservation bodies, game parks, reserves, wild life parks, zoological establishments and botanical gardens as well as wildlife conservation.

The Gaming and Lotteries (G&L) sub-sector consists of gambling, licensed casinos, the National Lottery, operation and management of horse racing events, clubs and academies, totalisators, bookmakers, limited payout machines (LPMs) and bingo operators.

The Hospitality (HOSP) sub-sector comprises hotels, motels, boatels and inns, guest houses and guest farms, bed and breakfasts, management and operation of game lodges, caravan parks & camping sites, restaurants and tearooms with or without liquor licenses, fast food establishments, take away restaurants, caterers and catering services, timesharing and bioscope cafes.

The Sport, Recreation and Fitness (SRF) sub-sector includes sporting activities, sport federations, the operation and management of sporting facilities, clubs and sports academies, the promotion and management of sporting events and activities both motorised and non-motorised, amusement parks, recreational and cultural activities, operation & management of recreation parks, beaches, fairs, shows and facilities, and the operation and management of health & wellbeing centres including hydros, spas and fitness centres.

The Travel and Tourism (T&T) sub-sector consists of inbound and outbound tour operators, safaris and sightseeing bus tours and trip operators, inbound international flights, travel agencies, renting of land transport equipment, event and conference management, the operation and management of convention centres, tourist information centres, car hire and tourism authorities as well as guides including adventure, mountain, river, etcetera.

1.3. Key Role-Players

The sub-sectors within CATHSSETA's scope are represented by diverse organisations and workforce. The key role-players within the sectors are indicated below in Figure 1.

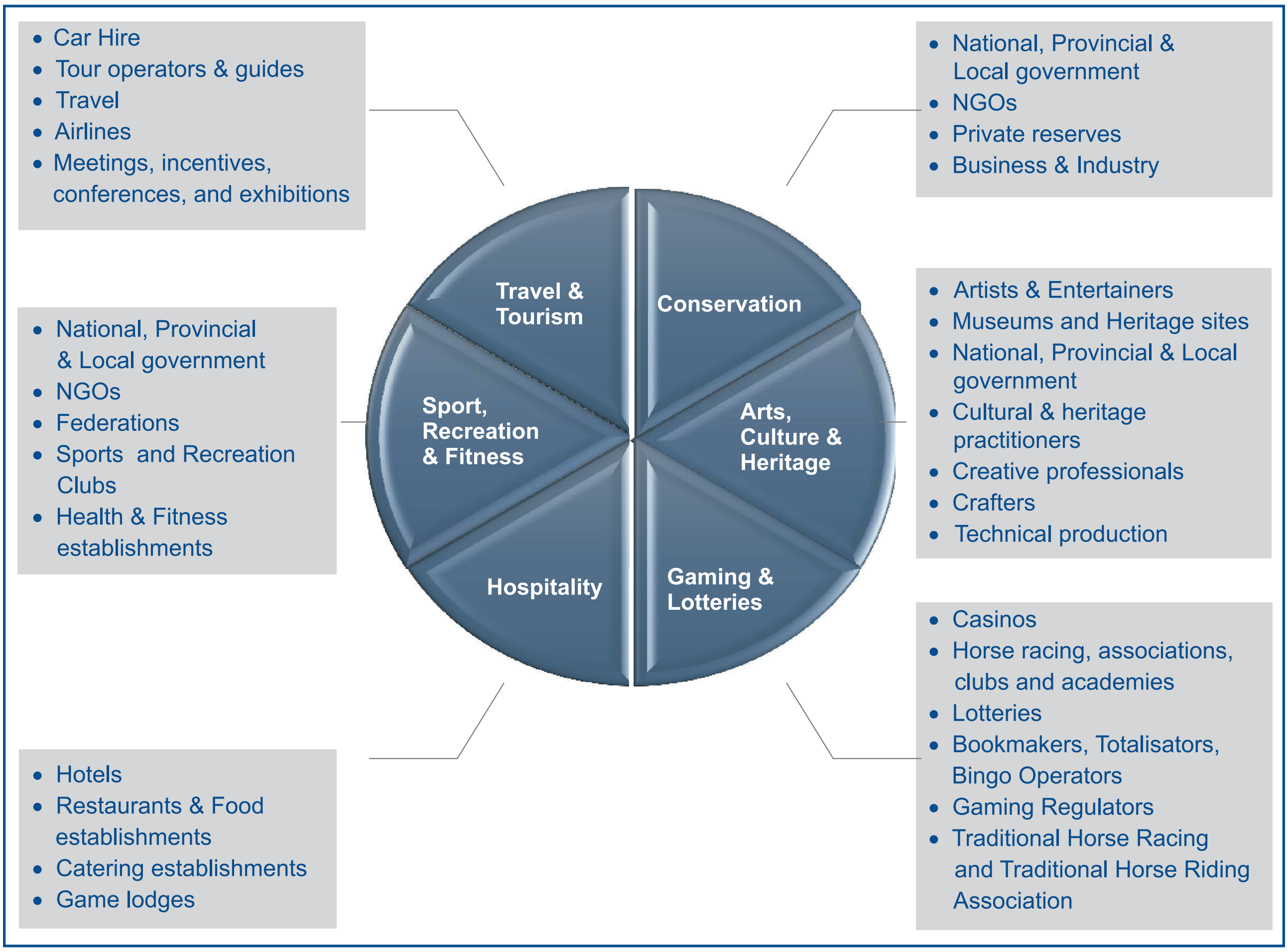


Figure 1: Key role-players per sub-sector

As indicated in Figure 1, the key role-players in the Arts, Culture and Heritage, Conservation and Sport, Recreation and Fitness sub-sectors include bodies at National, Provincial and Local levels of government. The remaining sub-sectors comprise of a variety of establishments, industry associations and industry bodies.

1.4. Economic Performance

The economic performance of the sector as a whole is difficult to assess due to the lack of a single database encompassing the six CATHSSETA sub-sectors. Based on the latest statistics from the National Department of Tourism (NDT), the sub-sectors contributed a total of R357 billion to South Africa's Gross Domestic Product (GDP) in 2014, supporting 9% of total employment (NDT, 2015). This is across the value chain i.e. including the contribution largely from the Hospitality, Tourism and Travel, and Conservation sub-sectors and to a smaller extent the Arts, Culture and Heritage, Gaming and Lotteries as well as Sport, Recreation and Fitness sub-sectors. According to the National Department of Tourism (2015), South Africa's tourism and hospitality sectors will be boosted significantly by about 200 international events confirmed to take place in the country over the next five years, which include meetings and conferences that are expected to attract about 300 000 delegates. The potential economic impact of these meetings and conferences is expected to be R1.6 billion. As the growth of the sector is largely reliant on events, this outlook is positive.

The Tourism and Travel sub-sector is one of the key contributors to the economy of the country, with the sector's total contribution to the GDP amounting to R375.5 billion in 2015. The sub-sector's direct contribution to GDP in 2015 was R118.6 billion, an increase from R113.4 billion in 2014 (World Travel and Tourism Council, 2016). The number of jobs the sector directly supported also increased to 703 000, indicating a 3.4% increase (World Travel and Tourism Council, 2016). The contribution from the Gaming and Lotteries and Hospitality sub-sectors also increased in the past year. The gross gambling revenue from casinos, bingo, limited pay-out machines and betting increased to R23.9 billion in 2015 with casinos accounting for the highest revenue at 72.1% (National Gambling Board, 2015). The Hospitality sub-sector also indicates growth, with the total room revenue increasing by 9.9% from R17.2 billion to R18.8 billion in 2014 despite a slower growth in stay unit nights over the same period attributed to the Visa regulations (PricewaterhouseCoopers, 2015). However, the occupancy rate increased to 54.4%, reaching its highest level over the past seven years.

According to the 2014/2015 Annual Report of Department of the Arts and Culture, the arts, culture and heritage industries contributed R90.5 billion to the GDP. The music and crafts industries contributed the most at R17 billion and R3.3 billion respectively. The rest of the industries i.e. the visual arts, performing arts and heritage contributed just over R1 billion to the GDP during the same period (South Africa Yearbook, 2014). The film and television industry contributed R26 billion to the GDP in 2015 and continues to grow while the music industry suffered a 3.3% decrease. Statistics published in 2015 indicate that the film and television industries experienced positive growth and are worth R2.9 billion and R32.4 billion respectively. In contrast, the growth of the music industry continues to decline, with the latest value estimated at R2.0 billion (a decrease from R2.1 billion in 2013). This is due to the strong competition from the internet through the availability of free music content and streaming capabilities (PricewaterhouseCoopers, 2015).

The cultural and creative industries created between 160 809 to 192 410 jobs and contribute 2.9% to the country's GDP. According to the Industrial Policy Action Plan (IPAP) 2012/13-2014/15 (2013), the South African craft sector provides income and employment to approximately 273 495 people through the economic activity of about 31 802 micro and small enterprises operating across the value chain. The recording industry in South Africa was worth R1.7 billion and ranked 17th in the world (Government Communication and Information System, 2014).

There is a lack of data on the economic performance of the Sport, Recreation and Fitness sub-sector from 2010 to date. However, the 2022 Commonwealth Games are expected to contribute R11 billion to the GDP and create about 10 000 jobs. This event will also see an estimated 200 000 tourists coming into the country. The sub-sector also contributes directly and indirectly to economic growth. Compared to other sectors, the SRF sub-sector is not a productive sector but acts as a catalyst for job creation in other sectors such as advertising, multimedia, equipment, clothing, footwear, facility construction and insurance services.

When assessing the Conservation sub-sector, it has emerged that there is a lack of recent official statistics and where these do exist there is no differentiation between the environmental sector and its conservation component which makes it a challenge to make a clear determination. However, based on a 2006 report to NEDLAC, the last available data, the environmental goods and services sector (more commonly referred to as "green industries" in government policy) was valued at between ZAR 14.5 billion and ZAR 23.2 billion in 2004, i.e. from 1.0-1.6% of GDP (Montmasson-Clair, 2012). This lack of accurate official statistics regarding the economic contribution of the environmental and conservation sectors, is exacerbated by the fact that from a green economy perspective, South Africa does not report green jobs individually in any of its official surveys or statistics.

Assessment of the economic performance of the sector shows that the tourism sector remains one of the key drivers of economic growth. This is despite the enforcement of the Visa Regulations which saw a decrease by 6.8% of international tourist arrivals (National Department of Tourism). The Entertainment and Media revenue growth is expected to continue to exceed the nominal GDP growth from 2015 to 2019 (PricewaterhouseCoopers, 2015).

According to the 2013/14 Annual Report of the National Department of Tourism, the sector injected R35.3 billion into the economy from January to June 2013, which is more than the R32.6 billion the gold exports contributed. The overall growth of the Entertainment and Media revenue, including the music, television and filmed entertainment, is estimated to outstrip both nominal GDP and real GDP growth over the forecast period i.e. 2018 (PricewaterhouseCoopers, 2014).

The available statistics and forecasts indicate that most of the sub-sectors will experience growth in the next three to five years. According to the Entertainment and Media outlook, digital growth will fuel an increase in the growth of the television and film industries of 4.5% and 6.1% respectively (PricewaterhouseCoopers, 2015). The Tourism and Travel sub-sector's contribution to the GDP is estimated to increase by 3.9% in 2016 while employment is expected to rise by 3.8% for the same period (World Travel and Tourism Council, 2015). The Hospitality Outlook estimates an 8% compound annual increase, with the total room revenue increasing to R27.7 billion in 2019 (PricewaterhouseCoopers, 2015). Review of the Gaming and Lotteries sub-sector indicates that gambling turnover is expected to increase to R395.4 billion in 2019 – indicating slow growth due to the slow growing economy and growing competition from illegal gambling (PricewaterhouseCoopers, 2015). According to the National Gambling Board (2015), gambling participation in South Africa has been on the increase since 2012, rising to 15.3% in 2015.

The future outlook remains positive with most of the sectors expected to further contribute to growth in revenue. A review of the Gaming and Lotteries sub-sector indicates that the gross gambling revenue is expected to increase to R29.8 billion in 2017 while gambling turnover is expected to increase to R394 million in the same period (PricewaterhouseCoopers, 2013). Within the Hospitality sub-sector, slower growth is anticipated with total room revenue and occupancy rate projected to increase to R24.1 billion and 57% respectively in 2018 (PricewaterhouseCoopers, 2015).

1.5. Employer Profile

The number and size of entities registered with CATHSSETA have been sourced utilising the CATHSSETA SETA Management System (SMS) and the figures are presented below in the table.

Table 2: Number and Size of Entities Registered with CATHSSETA

Sub-sector	Size of Entity			Number of entities registered with CATHSSETA	% in the sector
	0-49	50-149	150+		
Arts, Culture & Heritage	1 966	46	23	2 035	7.34%
Conservation	1 483	30	19	1 532	5.52%
Gaming & Lotteries	254	35	47	336	1.21%
Hospitality	1 8108	697	296	1 9101	68.86%
Sport, Recreation & Fitness	2 040	75	30	2 145	7.73%
Travel & Tourism	2 467	77	46	2 590	9.34%
Total	**26 318**	**960**	**461**	**27 739**	**100%**

Source: CATHSSETA SMS 2016

The Hospitality sub-sector encompasses almost 70% of the sector, making it the largest in the sector. The Travel and Tourism and Sport, Recreation and Fitness sub-sectors follow with each representing approximately 9% and 7% respectively.

Small Medium and Micro Enterprises (SMMEs) make up a large proportion, at 95%, of the entities registered with CATHSSETA. These SMMEs are predominantly exempt from the payment of the Skills Development Levy (SDL). The large size of the sector, combined with the small levy base makes the allocation of resources a challenging task.

In order to examine the levy income from organisations within the sector, we compare the total levies received from the 2014/2015 financial year to that of the 2015/2016 period. Figure 2 which follows, illustrates this comparison. The total levies received from employers have increased from the 2014/2015 period to 2015/2016 period. This increase amounts to approximately 10%.

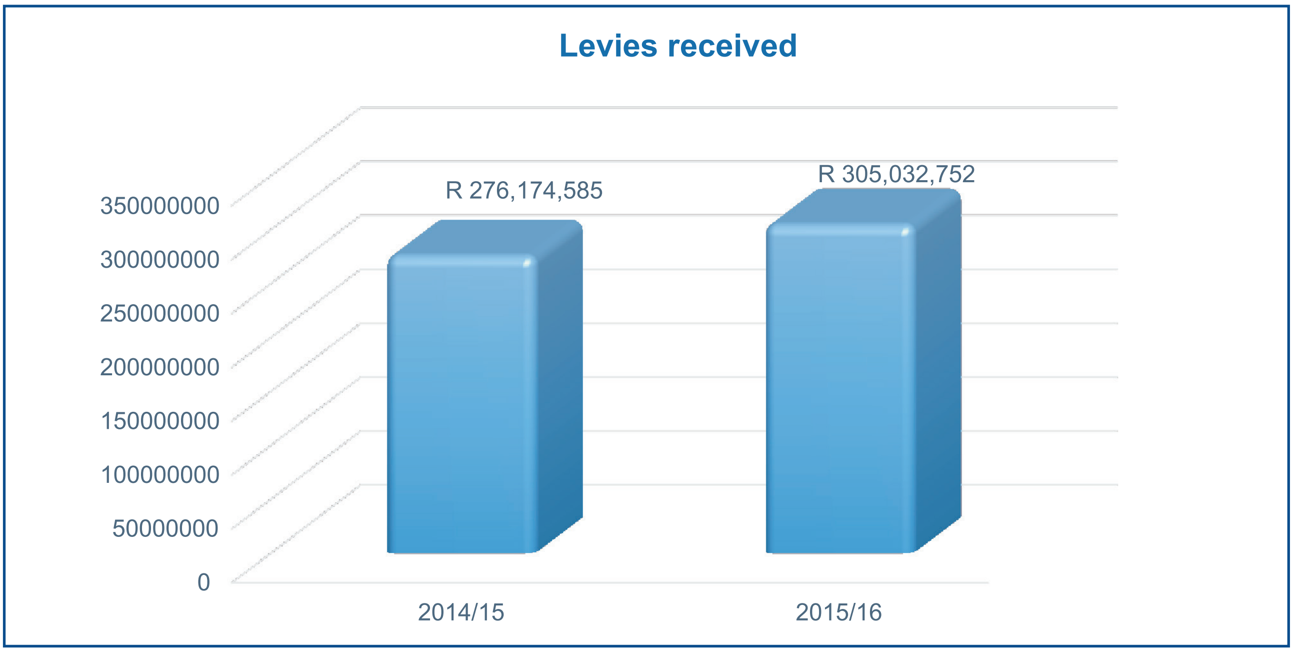


Figure 2: History of levies received during the 2014/15 and 2015/16 financial years
Source: CATHSSETA Annual Financial Statements

The number of levy payers have increased from 6 053 in 2014/2015 to 6 297 in 2015/2016. Whilst this increase is encouraging, this only equates to 23% of the total number of registered entities within the sector. The majority of the levy income received, as regulated, is directed to Professional, Vocational, Technical and Academic (PIVOTAL) training interventions in the sector. A total of approximately R160 million was allocated to the sector in the form of discretionary grants in the 2015/2016 financial year.

The analysis of the geographical spread of the sector is illustrated in Figure 3. The majority (46%) of the entities are located in the Gauteng province. The KwaZulu-Natal and Western Cape provinces account for the second and third largest in terms of the geographic spread of entities at 17% and 7% respectively.

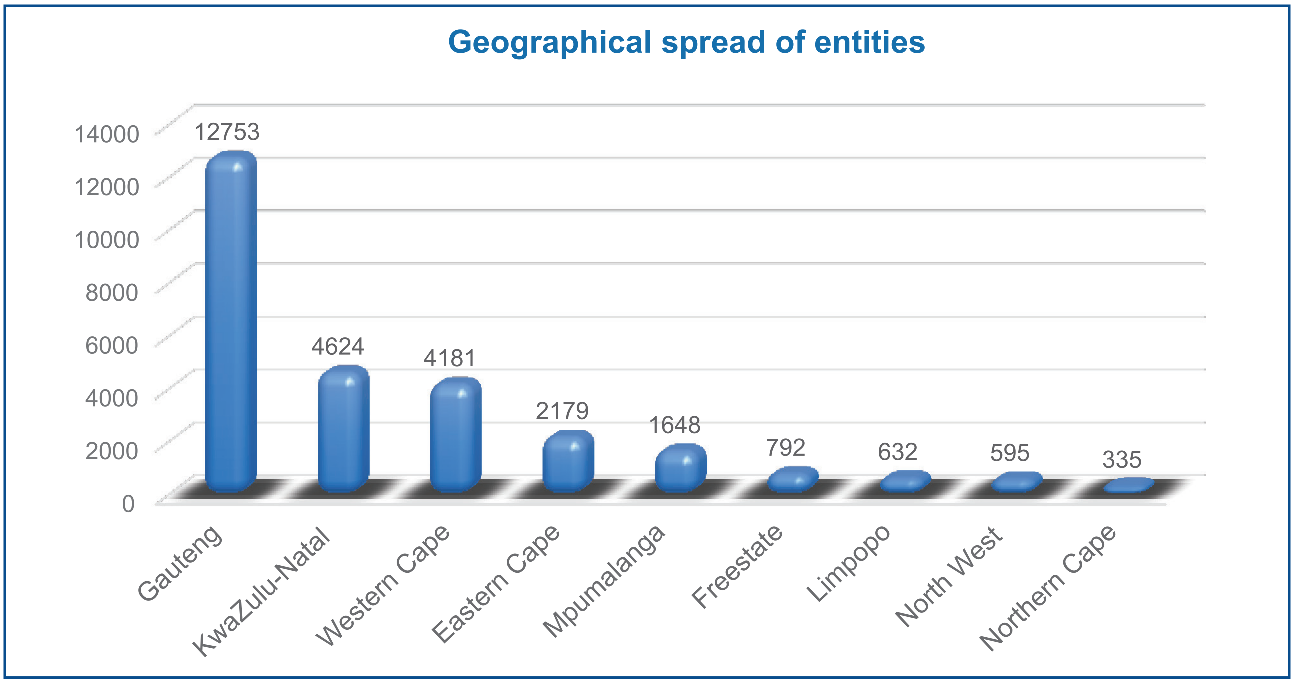


Figure 3: Geographical location of entities registered with CATHSSETA
Source: CATHSSETA SMS 2016

Analysis of the start-up and closures of businesses in the sector indicates that the hospitality industry is characterised by a high rate of such start-ups and closures, especially due to the prevalence of small and medium size organisations. A further contributing factor is the viability and liquidity positions of such businesses. Three key elements have been identified that contribute to the high rate of business start-ups in the hospitality industry, these are: minimal capital investment requirements; non necessity of specialist knowledge, and the low qualification barriers to entry as compared to other industries. External elements such as location, number of competitors, and affiliation with a group affect the survival of hospitality organisations leading to closures. Gaming and lotteries in South Africa has been heavily restricted, with South Africa's Gambling Act of 1965 officially banning all forms of gambling except betting on horse racing which existed as a sporting activity. The National Gambling Act permits 40 licensed casinos in South Africa. A total of 38 are currently licensed, of which 37 are in operation. The Tsogo Sun Group, Sun International and Peermont Global Group are the leading casino companies in South Africa, together accounting for 35 of the 38 licensed casinos.

Data within the Sport, Recreation and Fitness sub-sector is currently not available as most organisations operating within this area are not formally registered. An example of this is the case of community based clubs which are not formally registered. The Conservation sub-sector is divided among the public sector, private sector, and Not for Profit sector and current information on the start-ups and closures is not available. IPAP 2 recognises the Cultural Industries as growing at a rate far higher than the well-established industries of service and manufacturing, with opportunities to small and medium sized enterprises with the potential for global competitiveness. Within the music industry operational costs are the greatest expense and the highest inhibitor to small businesses in the sector, which therefore leaves them struggling to sustain themselves. A general characteristic of the industry is the dependency on government grants which then leads to closure of a number of organisations due to the lack of self-sustainability. Overall, data on the sector is limited and tracking of the start-ups and closures of businesses within the sector is challenging due to the nature and scope of the six sub-sectors.

1.6. Labour Market Profile

Analysis of the labour market profile in terms of employees per sub-sector and geographical spread has been provided in Figures 4 and 5 as follows:

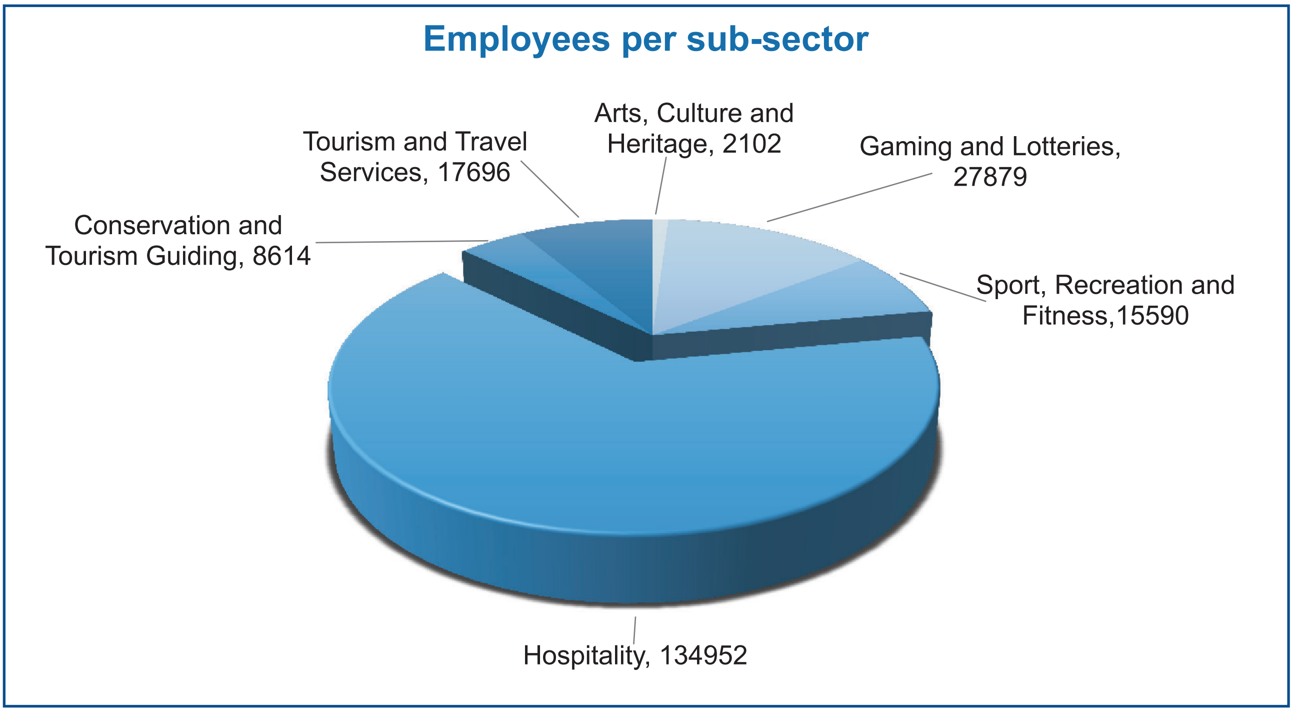


Figure 4: Employees per sub-sector
Source: CATHSSETA SMS 2016

Based on Figure 4 above, the following is evident per sub-sector:

Arts, Culture & Heritage: A total of 2 102 employees have been reported through the Mandatory Grant application process for 2016. This figure has decreased from the total of 2 292 reported in the previous year, indicating an 8% decrease. The sub-sector still represents only 1% of employees in the sector as in the past two years.

Conservation: In the past three years, the numbers of employees within this sub-sector has been steadily increasing with the 2014 to 2015 period recording the highest increase at 20%. However, the number of employees has decreased by 40%, from a total of 14 477 to 8 614 in 2016.

Gaming & Lotteries: This sub-sector has shown the second greatest increase in the number of employees, at a growth of 12%. The total number of employees increased from 24 788 to 27 879 and the sub-sector remains the second-largest in terms of the number of employees it represents

Hospitality: The Hospitality sub-sector remains the largest employer in the sector, with a total of 134 952 employees reported. The number of employees has decreased by 1% from the previous year, with the sub-sector still representing 65% of employees in the sector.

Sport, Recreation & Fitness: The sub-sector continues to increase from 13 337 in 2014, 14 189 in 2015, to 15 990 in the current year. This indicates a growth of 13%, the highest increase within the sector.

Travel & Tourism: The number of employees reported has decreased from 18 171 in 2015 to 17 696 in the current year. The sub-sector represents 8% of employees in the sector, and thus continues to be the third largest in that regard.

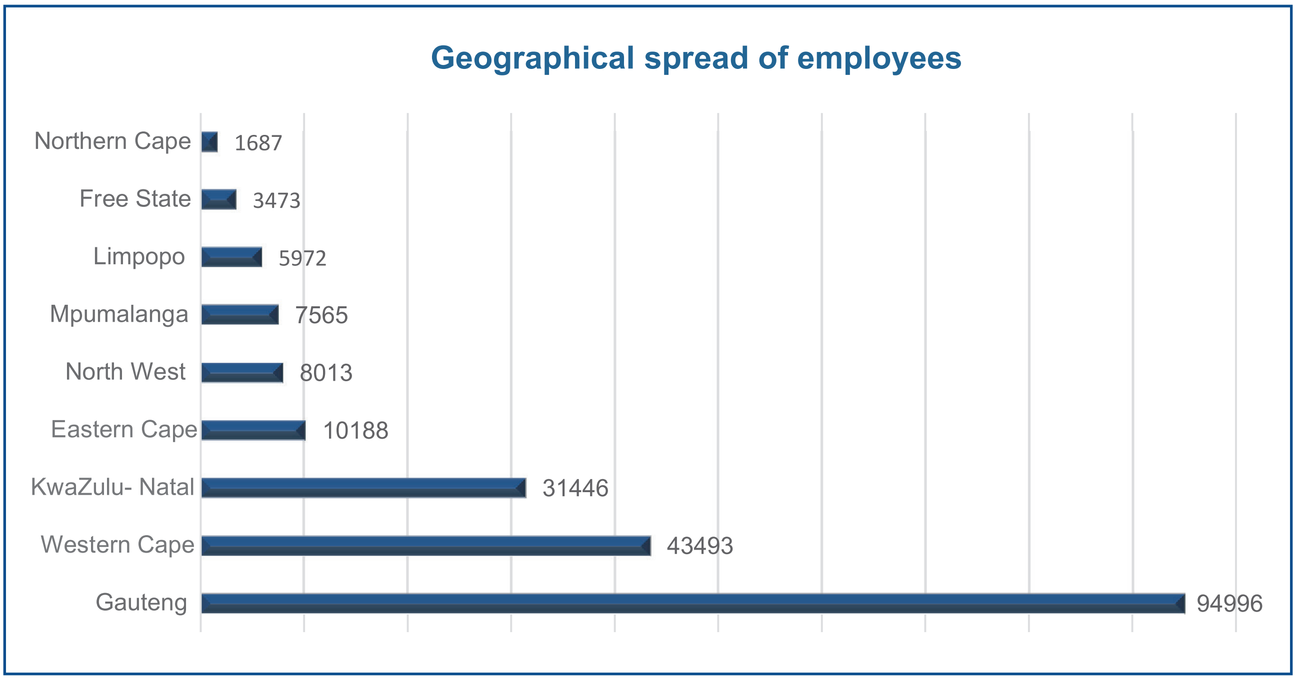


Figure 5: Employees in the sector per province
Source: CATHSSETA SMS 2016

Figure 5 provides the geographical breakdown of employees in the sector. The geographical spread of employees follows a similar trend as with the entities. The highest concentration of employees is found within the Gauteng, Western Cape and KwaZulu-Natal provinces. This is supported by the latest ranking of the Top 10 regions as provided by South African Tourism (2015). According to this, the Drakensberg, Battlefields and Elephant Coast in KwaZulu-Natal, Cape Winelands, Cape Peninsula, Garden Route and Klein Karoo in the Western Cape, and Soweto in Gauteng are the top 10 tourism regions in the country. This is indicative of the concentration of tourism within the country and thus may explain the dominance of these three provinces.

The gender and race demographics are provided in Figures 6 and 7 respectively. Analysis of employees based on these demographics per sub-sector indicates that the Black African employees dominate in all sub-sectors. In terms of each sub-sector, the demographics are as follows:

Arts, Culture & Heritage: There are more male employees within this sub-sector, representing 59% of the employees. The White population group represents 35% of employees, not much higher from the 41% represented by Black African employees.

Conservation: The number of employees is skewed towards males who make up 61% of employees. This could possibly be a reflection of the nature of the jobs (hunting, trapping, park rangers, etc.). About 84% of the employees are Black African compared to 10%, 5% and 1% of White, Coloured and Indian population groups respectively.

Gaming & Lotteries: This sub-sector is dominated by Black African employees (76%) and has more females (57%) than males.

Hospitality: In this sub-sector female employees are in the majority with 61% representing the sub-sector. Similar to the Gaming and Lotteries sub-sector, the Black African employees represent a majority followed by the White population group.

Sports, Recreation & Fitness: The majority of employees are male with the Black African and White population groups taking the lead in terms of the racial profiling.

Travel & Tourism: Female employees make up a majority of this sub-sector at 58%.

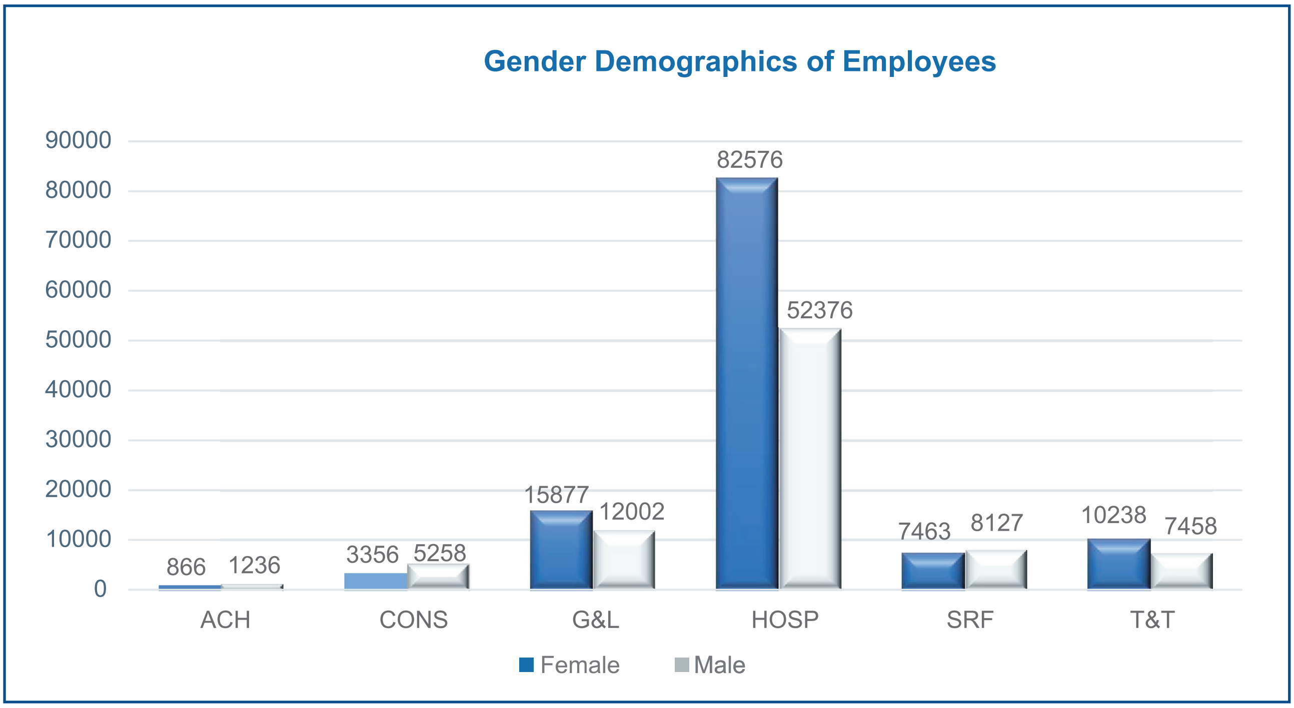


Figure 6: Gender demographics of employees per sub-sector
Source: CATHSSETA SMS 2016

The race demographics of the sector have been broken down per sub-sector and are presented in Figure 7. Of the 206 833 employees reported by employers submitting a Mandatory Grant Application, 73% of employees fall within the Black African race, followed by White and Coloured at 12% each and finally Indian population group at 3%.

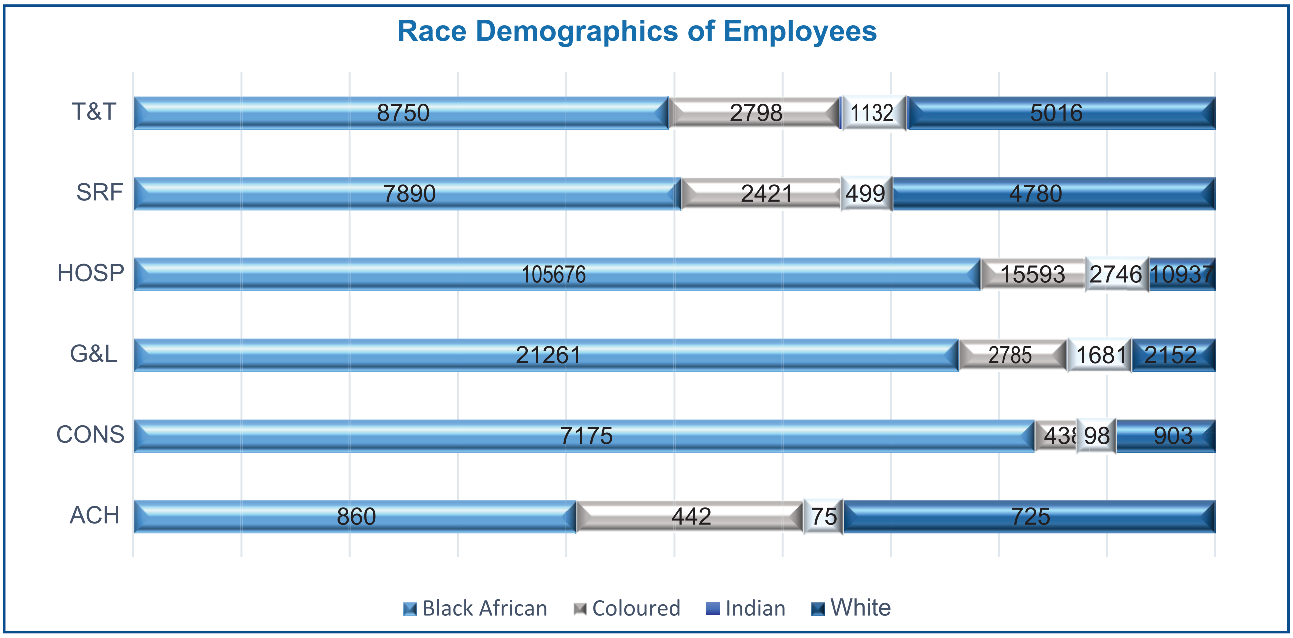


Figure 7: Race demographics of employees per sub-sector
Source: CATHSSETA SMS 2016

The number of employees in the sector with some form of disability increased from 797 in 2015 to 1061 in 2016 as seen in Figure 8 below. This indicates a 33% increase although the percentage of people with disabilities within the sector still remains low at 1%. A majority of these employees are within the Hospitality sub-sector which employs 58% of people with disabilities in the sector.

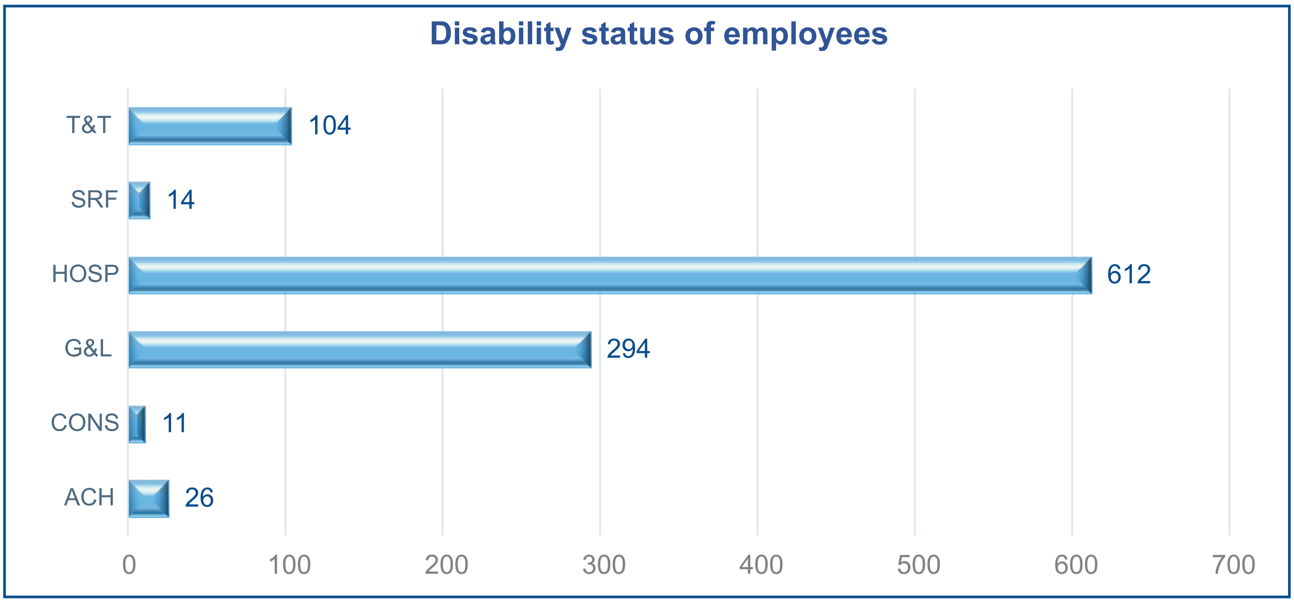
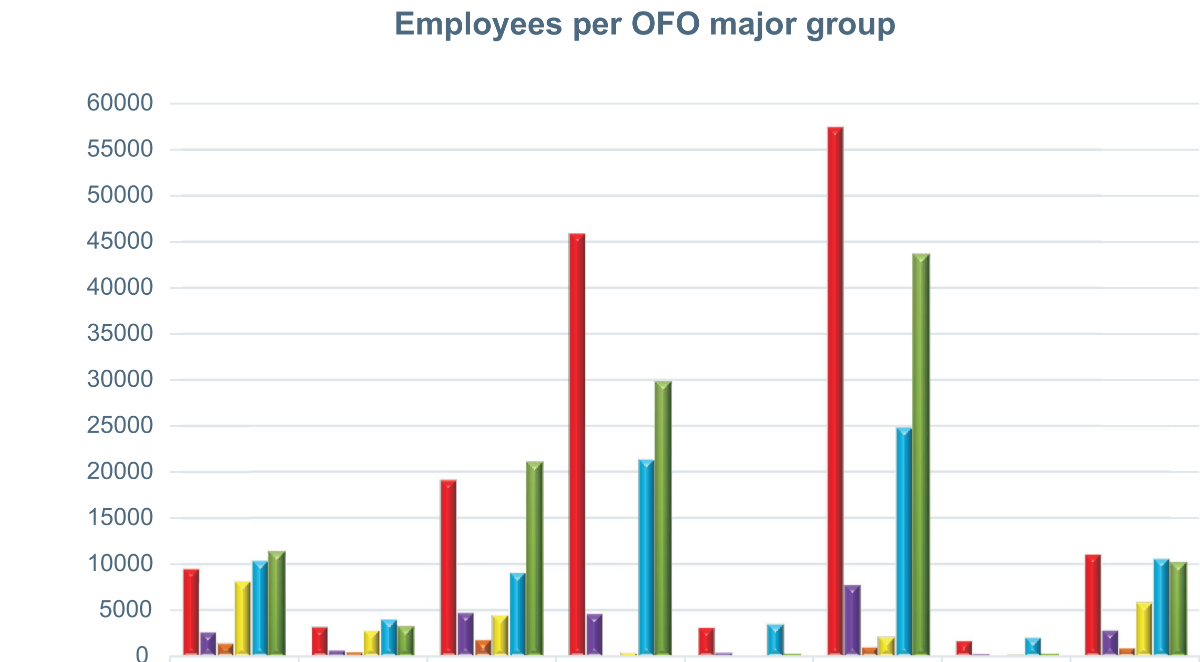


Figure 8: Disability status of employees within the sector
Source: CATHSSETA SMS 2016

The distribution of employees per OFO major group is presented in Figure 9 below. The OFO is a coded occupational classification system, which aims to capture all jobs in the form of occupations. The distribution indicates that the majority of Black African employees are within the Service and Sales Workers, Elementary Occupations and Clerical Support Workers major groups. Male employees dominate the Managers and Professionals major groups while a majority of females occupy the Services and Sales Workers, Clerical Support Workers and Elementary Occupations major groups.



	Managers	Professionals	Clerical Support Workers	Elementary Occupations	Plant & Machine Operators & Assemblers	Service and Sales Workers	Skilled Agri Forestry Fishery, Craft Trades	Tech. & Ass. Professionals
Black African	9595	3277	19160	45949	3196	57505	1777	11153
Coloured	2727	778	4799	4638	517	7754	335	2929
Indian	1438	551	1828	219	73	1087	60	975
White	8175	2881	4530	464	113	2205	260	5885
Male	10469	4135	9185	21378	3628	24837	2169	10656
Female	11466	3352	21132	29892	271	43714	263	10286

Figure 9: Employees per OFO major group
Source: CATHSSETA SMS 2016

1.7. Conclusion

This chapter has outlined the scope of coverage of the sector including an analysis of the key role-players, the economic performance of the sector and indicating the competitive position of the sector. Furthermore, it has analysed the employer and employee profiles reflecting trends and patterns of employment. Analysis of the sector has indicated that it has experienced growth in the 2016 year, with the approximate contribution of the sector to employment in the country exceeding 1 million jobs.

CHAPTER 2

KEY SKILLS ISSUES

CHAPTER 2: KEY SKILLS ISSUES

2.1. Introduction

This chapter focuses on factors that drive change in the sector. Factors such as globalisation, technological change and trade liberalisation have the potential to impact the nature of work on a macro level and this translates into changes in terms of how work is carried out. Thus, the aim is to identify the major factors impacting skills demand and supply and the implications these have for skills planning in the sector.

The chapter also looks at the National Strategies and Plans to identify their relevance to the sector and the implications these have for skills planning. The change drivers and National Strategies and Plans were identified using desktop research and through consultations with the SETA's Joint Working Committees and stakeholders. An analysis of these is conducted and the implications in terms of skills planning are extrapolated and related to interventions offered by the SETA.

The chapter is divided into the following two sections:

- Change drivers
- Alignment with National Strategies and Plans (including sub-sector specific strategies and plans)

2.2. Change Drivers

This section looks at technology, globalisation, legislative issues, and the changing nature of work as the key factors that drive change within the sub-sectors and thus influence skills planning. These factors were elicited from a variety of sources, including desktop research and input from stakeholders through workshops, interviews and focus groups.

Technology

Technology is a key driver of change for businesses within the CATHSSETA sector. The impact of technological advancement is seen within all the six sub-sectors. An example of this within the gaming industry is online betting which has tended to widen the offering and attract new types of customers. Within the lotteries industry, the impact of technological change is seen in the increasing availability of online platforms such as mobile phone applications, website and mobile banking applications for customers to purchase lottery tickets.

According to the International Labour Organisation (ILO) (2014) the most important emerging technologies in the tourism and hospitality sub-sectors include the use of electronic tourist passes, personalized electronic guides, electronic booths, global IT booking systems, satellite-enabled environmental management, sustainable management of tourist resources, telecommunications integration, energy-efficient microsystems, food hygiene control systems for hotels and restaurants, equipment and systems to improve accessibility for disabled persons, electronic translation devices, and thalassotherapy equipment for hotels.

Other key technological changes affecting the industry include the growing use of the internet to purchase services, growing popularity of User Generated Content websites (such as Tripadvisor), the use of database mining techniques to target consumers and increased utilization of social networking websites as marketing tools.

In the Hospitality industry, the increased use of the internet for online booking of accommodation accompanied by innovative business models, as seen with the recent AirBnB - an online market

place that connects hosts offering accommodation and travellers, poses an increasing threat to traditional accommodation vehicles such as hotels, lodges, BnB's et cetera.
The increasing use of mobile technologies such as phones, tablets and computers necessitates that accommodation and conferencing facilities be able to offer services such as Wi-Fi. This requires investment in both capital infrastructure and the availability of skills to service such technology.
Review of the tourist guiding and car rental industries indicates that the role of technology has become increasingly more important. To improve on the product being offered to tourists, employees in these fields need to be able to use technology. An example of this is a Tour Guide having online and immediate access to information on key points of interest when guiding tourists.

The Sport, Recreation and Fitness sub-sector has also become more technologically driven, for example, with technological advances in gym equipment, gathering and assessment of sport conditioning data, electronic media and the manner in which sports events are covered. The use of technology in sporting games like Hawk-Eye Technology, high-tech aids to aid referees in decision making, numerous software packages that are designed for fitness and nutrition professionals to organize data and produce reports are increasingly on the rise. Advancement of technology has also changed how people view, or gain access to sport. The internet and cellular technology now allows people to receive match results instantaneously, bringing about new ways of advertising through sport.
The dominance of information and communication technologies has placed new skills demands on traditional occupations. In the Conservation sub-sector, curators and conservation biologists require information management skills. There is a growing demand for crosscutting trans-disciplinary skills. This calls for tailored professional development programmes to support the traditional higher education curricula, which should also offer programmes of specialisation at post-graduate level.

The increased use of technology is likely to reduce the need for some physical human resources while new technology will likely drive the demand for new skills and roles. In the Arts, Culture and Heritage industry there is a move towards increased use of digital communication in editing, post-production tasks which will likely impact human resources required. Within the Hospitality and Travel industry for example, customers are able to book and pay for hotel accommodation and travel bookings online without the need for face-to-face contact or assistance from a call centre. The potential consequences of such continued advancements is the reduction of physical human resources due to automation, or the need for a very specific set of skills which cater to technology. Similarly, the use of virtual fitness instructors within the Recreation field will likely see a decrease in the use of Fitness Instructors and fitness facilities.

Globalisation

This has brought about the emergence of a more "sophisticated tourism market" which has implications for skills and training. A more discerning and experienced consumer is demanding higher quality products and service, raising demand for skills such as customer service. In terms of providing better service to international visitors, skills that potentially need improving include: the ability to be able to communicate clearly in simple English, cultural awareness, intercultural skills, language skills and local knowledge.

The music industry, film, television, live events and technical production industries are evolving and changing fast to new occupational patterns and skills demands. These are brought about by fast-changing market conditions, competition, economic restructuring, advancing technologies and process and product improvements. The current process of economic and technological transformation requires a constant renewal of skills on the part of workers, employers and managers, and it favours those countries best able to meet this demand for enhanced skills. An example of this is seen with record companies increasingly requiring a workforce that is more flexible, more skilled (especially in terms of marketing music in the digital space) and more adaptable to rapid changes in the business environment.

Legislative issues

New visa regulations, directly impacting the sector, came into effect in October 2014. These require visitors to apply for visas in person at South African embassies to record biometric information and for children under the age of 18 years to produce unabridged birth certificates at all ports of entry. The intention of these regulations are to safeguard the interest of children and prevent child trafficking. The potential negative impact of these regulations on tourism and investment however was not intended. There has since been revisions to these regulations in October 2015 which have provided for increased flexibility. This is expected to benefit the industry, in terms of increased tourism to the country.

Changing nature of sector

The nature of the sector is changing. This is particularly seen in the SRF sub-sector where there is an increased recognition of the importance of sport, coupled with the move towards increasing globalisation. The effect of such is seen through the diversification of the types of people participating in sport. For example in South Africa, more women are involved and participating in sport and people from lower socio-economic groups are becoming more active and want to live a healthy lifestyle. Rising change from those participating in sport means that people or consumers are starting to demand specialised and specified services in sport, recreation and fitness (consumer orientated).

The perception of some occupations as a hobby e.g. arts and crafts, singing and acting professions, etc. means there is little emphasis on actual education and training in these fields. Thus entrants have no qualifications and limited skills. Within the Gambling sub-sector, horse-racing is viewed as a fashion event, further driving lack of awareness of the careers available within the field. This points to a need to promote such occupations as critical economic drivers. There is a growing trend in heritage and cultural tourism, which could provide opportunities for SMMEs in arts and crafts, heritage sites and can also result in a bigger audience for cultural festivals.

2.2.1. Key skills implications

The key skills implications based on the occupational patterns and skills structures outlined in the previous section may be summarised as follows:

- The profile of skills now required by businesses, taking into consideration the progression of technology, includes those of web development, e-commerce and online marketing and social media management.
- These changes have resulted in a demand for graduates who are not only competent in their fields of study but also entrepreneurial in their thinking and demonstrate technological savvy.
- For management occupations within the Conservation sub-sector, adaptive skills such as managing systems, complexity, knowledge brokering and advocacy are becoming critical. Increased technology will likely see a delineation of occupations which may impact the training component to include technology.

Based on the factors outlined above, the following emerging occupations have been identified per sub-sector from consultations with chamber working committees.

Table 3: Emerging Skills

Sub-sector	Emerging Skills
Arts, Culture & Heritage	Stagehand, Taxidermists and Audio Visual 3D Technician
Conservation	Biotechnician, Sustainability Manager, Environmental Economist and Biodiversity Stewardship, Wildlife Trade Economist, Wildlife Rancher
Gaming & Lotteries	System Administrators, Application Support, Draw Officers
Hospitality	Barista, Spa Managers, Food Safety Assurers and Revenue Managers
Sport, Recreation and Fitness	Corporate Wellness Consultants and Practitioners
Travel and Tourism	Product and contracting Executive Tour operators, Independent Travel Consultants/Professional Travel agency

Source: CATHSSETA SMS 2016

Industry stakeholders for the sub-sectors, excluding the Conservation sub-sector, are of the view that, while no new/emerging occupations are likely to come about, there is however a need to improve the existing skills of employees. This includes developing good knowledge about industry, acquiring decision-making skills, business acumen as well as the ability to use and keep up with improving technology.

Given the skills-biased nature of the current economic and technological transformation, worker training (formal education, vocational training and training in firm-specific activities) assumes an increasingly crucial role. Public and private institutions, including educational institutions, employment agencies, counselling and community organisations, are all instruments intended to assist individuals develop skills to find and retain formal employment. There appears to be enormous shifts in employer needs, therefore, considerable effort is required to rapidly improve literacy rates and general education levels, as well as to equip those in the informal economy with skills for which there is a demand or to create demand for the skills that informal workers have to offer.

2.3. Alignment with National Strategies and Plans

The following section outlines the National Strategies and Plans relevant to CATHSSETA's sub-sectors and details the alignment of these to skills planning within the SETA.

White Paper on Post School Education and Training

The White paper sets out strategies for an improved post school education and training system that will meet the needs of South Africa by 2030. A sharpened focus of SETAs is proposed, limiting the scope of a SETA to training of employees within the relevant sector and unemployed persons wishing to enter the sector. It is proposed that SETAs will be further employed to provide supply-side data towards the development of a national skills system. The focus of the SETA mandatory grant will be exclusively on gathering accurate data on sector skills needs. SETA discretionary grant funding will be intended for programmes aimed at supporting both existing workers and potential new entrants to the labour market. Providers could be public, private or even the employer's own in-house training institutions, provided they have the capacity to provide all or substantial parts of qualifications.

As it currently stands, the White Paper reinforces the vision of the National Development Plan (NDP). In terms of the proposed Technical Vocational Education and Training (TVET) Colleges, CATHSSETA has and is currently instrumental in the review of qualifications offered by TVET colleges as well as enriching the capacity of TVET college lecturers through the provision of exposure to industry, training on Occupational Directed-Education Training and Development Practice (OD-ETDP) and other programmes.

National Development Plan

In respect of the CATHSSETA sector and the quality of training delivered, it is pertinent to note that the very nature of the sector constitutes in-house or non-accredited training, as seen in the Planning and Reporting data submitted to CATHSSETA. This issue is further exacerbated by the absence of professional bodies to ensure quality needs of training. In keeping with the vision of the NDP and to promote the drive of accredited training, supported by the grant regulations, 80% of all Discretionary grants are spent on PIVOTAL programmes. These have been allocated across bursaries to employed as well as unemployed learners pursuing sector related qualifications. In addition to this, CATHSSETA supports Work-integrated learning interventions, Learnerships for both employed and unemployed persons and Skills Programmes to cater for critical skills for the employed.

In response to the NDP's vision of the TVET colleges becoming preferred institutions of vocational learning and improvement of education at TVET colleges, CATHSSETA plays a crucial role in building relationships between education institutions and employers. In addition to this action, the capacity of TVET colleges has been uplifted through interventions addressed at providing TVET College lecturers exposure to industry workings. Review of the Chef qualification, the only trade that falls within the sector, has been completed and the qualification is due to be launched this year. CATHSSETA has partnered with UMALUSI, the National Department of Tourism and various industry stakeholders to review the National Certificate Vocational (NCV) for both Hospitality and Tourism. This project critically examined supply issues in the labour market and has yielded significant findings that will allow for these qualifications to be realigned and scoped to industry expectations and ensure TVET College Graduates are readily absorbed by the labour market. The NCV review has produced a research report entitled "At Your Service - Towards an informed understanding of the NC (V) Tourism and Hospitality programmes". This report documents the exact curricular changes required for the NCV qualifications and the review task team has commenced with the actual revision of the curriculum.

CATHSSETA has further responded to the proposals outlined in the NDP, by ensuring that the directive on public entities' contribution of training budgets has been communicated by way of national workshops, in partnership with the Department of Public Service and Administration. Guidelines have been developed and continuous engagement with relevant public entities are currently underway to ensure participation.

National Skills Accord

Since the inception of the National Skills Accord of 2011 and in response to such, CATHSSETA has negotiated partnerships with employers and learning institutions. CATHSSETA strives to ensure that the submission of training plans and reports are subject to consultation with organised labour within a specific organisation. Training Committee workshops are held nationally, with the aim of establishing and empowering Training Committees in the workplace.

Employment Tax Incentive Act 2013

This Act commonly referred to as the Youth Wage Subsidy encourages youth employment and plays a pivotal role in the CATHSSETA sector. As reported in the Mandatory Grant application, over 54% of employees in the sector are youth. Thus, the incentive further encourages employers to continue employing from this age group. The sector, specifically Hospitality and Tourism is characterised by the perception of offering transition employment and thus attracts employees falling within the 18 – 29 age category. In addition to this, the regulation of wages in the sector e.g. the Sectoral Determination, allows employers within the sector to participate and derive benefit from the incentive.

The National Skills Development Strategy (NSDS) III

The NSDS III strategy consists of 8 goals, 16 outcomes and 38 outputs to be achieved mainly by SETAs in collaboration with the DHET, TVET Colleges, Universities and the National Skills Fund (NSF).

Rural economic development and provision of skills for rural development as outlined in the NSDS III remains a key priority for CATHSSETA. In order to ensure effective service delivery throughout the country, CATHSSETA has expanded its presence through the establishment of regional offices. Rural development projects and support for unemployed youth within rural areas remain a focus with six (6) rural skills development projects to be implemented in the 2015/2016 financial year.

Transformation within the sector still remains a challenge and is promoted by the utilisation of the NSDS III Developmental and Transformational imperatives being incorporated into the CATHSSETA criteria for allocation of Discretionary Grant funds. This criteria states that organisations need to take into consideration these developmental and transformational imperatives for Discretionary Grant funding. All Discretionary Grant allocations within CATHSSETA focus on the promotion of these developmental and transformational imperatives.

The Sector Education and Training Authorities (SETAs) Grant Regulations

The table below provides comparative figures from 2013 to 2016 of the Mandatory Grant Applications submission received by the SETA. Despite the initial decline in participation from 2013 to 2014, there has been an increasing trend in the number of applications received in the ensuing years.

Table 4: Mandatory grant applications received from 2013 - 2016

Year	Total submissions
2013	1 336
2014	1 111
2015	1 231
2016	1 270

CATHSSETA SMS: 2013-2016

As the majority of employers channel the mandatory grant received from SETAs back into their training budgets, it is encouraging that this number is on the increase after the initial decline in 2014. The representation of the sector is improved when more employers submit Mandatory Grant applications as this provides an important source of data on employers and employees.

The current Grant Regulations do not require SETAs to have a policy on Mandatory Grants (MG), despite this, CATHSSETA have developed its Mandatory Grant policy guided by these Regulations in order to regulate the system. The Discretionary Grants (DG) policy and framework provides clear requirements on the allocation and distribution of these grants. Thus, the impact of the Grant Regulations translated into the following; the DG window is now aligned to close at the same time as the MG (i.e. 30 April), the DG policy makes provision for the inclusion of strategic projects and increased transparency in the working of the SETA.

Previous records indicate that approximately 80% of monies have been spent on PIVOTAL training and thus the transition from old practices to compliance with the Grant Regulations has not been difficult.

The small size of the levy income and the nature of the CATHSSETA sector (being predominantly event driven) are limitations to the SETA. The decrease from 50% to 20% of the MG filters down to impact on resources available for research and this component falls under the non-PIVOTAL budget. CATHSSETA mitigates this shortcoming by establishing a national research network with (HEIs) and through the funding of learners at post graduate levels to research sector specific topics. Thus, linking PIVOTAL outcomes to increased research capacity within the sector.

The Strategic Integrated Projects (SIPs):

CATHSSETA's approach to SIPs funding has been integrated in the DG framework. The scarce skills required for the delivery of the SIPs have been presented by the DHET and CATHSSETA has identified the following four (4) scarce skills which will be addressed by supporting a total of 60 persons through Work Integrated Learning programmes:

- Environmental Manager
- Program or Project Administrators Assistant
- Truck Driver
- Handypersons

The Industrial Policy Action Plan (IPAP) 2014/15-2016/17

IPAP builds on the foundation laid since its inception in 2007/8. The plan focuses on several industries including the cultural and creative industries where the focus is on crafts, music, and film. In the latest version, the plan identifies the difficulty faced by craft producers, who are largely Small, Medium and Micro Enterprises (SMMEs) and cooperatives in terms of barriers to mainstream retail value chains. This presents an opportunity for CATHSSETA to support the small business sector (SMMEs, cooperatives) in growing their ventures through skill development interventions (training, funding, etc.) This will better equip the small businesses and aid them in gaining market access as well as sustain their presence in these markets. As part of the 2015/2016 target, CATHSSETA aims to increase support to 800 small business organisations

New Growth Path

The vision is to create five million jobs by 2020. It sets out the key jobs drivers (areas that have the potential of creating employment) and the priority sectors that we will focus on over the next few years. Tourism is one of the sectors that have been identified as a potential growth area. Developing these sectors, will focus amongst others, on improving education and skills development, enterprise development, promoting small business, and entrepreneurship. CATHSSETA will play an important role in developing skills through developing and improving qualifications relevant to the sector as well as supporting the development and sustainability of small business in the sector.

Sectoral Determination 5: Learnerships

The Sectoral Determination number 5 for Learnerships governs the employment of learner workers, which includes all Learnership agreements and skills development programmes. The determination sets out minimum wages, working hours, number of leave days and termination rules. The minimum wage allowances are dependent on the NQF level under which the learner is registered for and the credits earned by the learner. The weekly allowance ranges from R264.28 for a learner registered for NQF level 1 to 2 with 0-120 credits to R1 545.17 for a learner registered for NQF level 5 to 8 with 481-600 credits. This figures apply from 1 April 2015 to 31 March 2016. In the implementation of Learnerships, CATHSSETA ensures that the regulated minimum wages for Learnerships are applied in the sector.

The sub-sectoral specific national strategies and plans are outlined in the table below.

Table 5: Sub-sectoral strategies and plans

Sub-sector	National plans or strategies	Implications for skills planning
Arts, Culture & Heritage	National Policy on South African Living Heritage	The policy stresses the importance of training courses in leadership and management to have their fundamentals based on Ubuntu which will in turn be promoted by various stakeholders. CATHSSETA focuses on programmes such as Management Development programmes to assist in this drive to train leaders and managers.
	DAC Strategy 2012/2013 (Mzansi Golden Economy)	DAC and CATHSSETA have identified a need for provision of a coordinated skills development and training initiative as part of up-skilling local art organisations in hosting events and training in development of quality products and services for tourism consumption. The continuous process of creation, production, dissemination, exhibition and consumption of the cultural and creative industries requires education and skills development in each stage of the cycle and in all stages of the education system. The heritage sector requires the development of skills for the conservation and protection of our heritage estate and assets as well as the skills for management of cultural heritage tourism. It is therefore imperative for CATHSSETA and DAC to work towards developing required skills in Heritage Resource management among other interventions.
	National Heritage And Cultural Tourism Strategy 2012	The Strategy clearly illustrates the significant deficiencies of skills and qualifications in heritage conservation and management. Therefore the strategy calls for skills development and training in heritage and tourism to be matched with the availability of employment opportunities to absorb the skilled labour force. Therefore CATHSSETA through the QCTO process is making concerted efforts in ensuring the relevance of qualifications that cater for its sub-sectors. These efforts are also aimed at encompassing elements of Tourism to deepen the understanding of the relationship between Arts, Culture and Heritage and the Tourism sectors.

Sub-sector	National plans or strategies	Implications for skills planning
Conservation	The National Protected Area Expansion Strategy (2008)	This strategy aims to achieve cost-effective protected area expansion for ecological sustainability and increased resilience to climate change. The implications for CATHSSETA is capacity building through skills development programmes and initiatives to meet the needs of the sector. CATHSSETA has identified some of the occupational requirements within the Conservation and Biodiversity sectors as a scarce skill and are therefore prioritised in skill development initiatives.
	National Climate Change Adaptation Strategy	The National Climate Change Response White Paper (RSA 2011) states that the government must, amongst others, ensure that a holistic understanding of climate change and related issues is included in all relevant aspects of formal education curricula, that all SETAs add climate change to priority skills development programmes in the formal, informal and non-formal sectors of the education and training system and establish incentives for research and training such as bursaries to encourage students and scholars to research and study climate change. The role that CATHSSETA can fulfil is in development and review of relevant qualifications as well as funding of post graduate scholars who will conduct research into the sub-sector.
	DEA Strategy	The strategy places significant emphasis on CATHSSETA, as it is tasked with skills development for conservation bodies and agencies such as the South African National Biodiversity Institute (SANBI), SANParks, semi-independent provincial agencies and local government including the Department of Environmental Affairs and provincial departments. These and other entities operate under a new conservation paradigm in which the protection of biodiversity and development planning must be integrated. However, few have been trained in this new paradigm and thus CATHSSETA can play a role in developing training initiatives.

Sub-sector	National plans or strategies	Implications for skills planning
Hospitality	National Development Plan	The plan sets a target of 30 000 artisans that need to be trained by 2030 and this falls directly into CATHSSETA's mandate of Artisan development. To address this need, CATHSSETA together with the Quality Council for Trades and Occupations (QCTO) has completed the review and registration of the chef qualification as a trade. This new qualification is a three year qualification with both a theoretical and practical component. At the end of the 3 years the learner is required to complete a trade test in order to be classified as an Artisan.
	Immigrations Act and Regulations	The amendments to the Immigrations Regulations Act of 2002 have resulted in new Visa regulations implemented in 2015. This brought about the repealing of the quota and exceptional skills work permits and the introduction of a category of Critical Skills Work Visa, to assist in attracting critical skills to the country. The Critical Skills Work Visa allows us to attract professionals to the country with critical skills that are likely to advance national interest.
	Sectoral Determination 14: Hospitality	The Sectoral Determination for the Hospitality sector requires the minimum wage offered by employers with 10 or less employees to be R 2 760.59 and for employers with more than 10 employees to be R 3 076.98. For CATHSSETA this translates into the need to ensure that funding criteria is in line with the Department of Labour in terms of the regulated minimum wage for the sector.
Gaming & Lotteries	Lotteries Act 32 of 2013	The Lotteries Act regulates lottery activities and provides the basic framework for the management and operation of the national lottery. The priorities for distributing funds include the provision of educational facilities designed to enhance literacy, vocational training and mentoring for skills development that include disabled. All of these are specific areas of focus in the NSDS III.

Sub-sector	National plans or strategies	Implications for skills planning
Sport, Recreation and Fitness	National Sport and Recreation Plan (NSRP)	The overarching focus of the three values of the NSRP is to improve access to and participation in sports as well as develop talent for the sport and recreation sector. For CATHSSETA this translates to developing training and education initiatives aimed at developing sports and recreation personnel, particularly coaches, administrative and technical officials. The focus also has to be on financial, marketing and media skills. This can be achieved through accredited education and training programmes.
	South African Coaching Framework	The focus will be on Recognition of Prior Learning (RPL) of coaches; accreditation support for the National Federations and also training coach developers as facilitators, assessors and moderators.
	Sports Tourism Strategy	The aim is to broaden the capacity building initiatives within the sporting industry to encompass elements of tourism so as to deepen the understanding of the sports tourism element of sports development. CATHSSETA will work with its partners such as HEIs to ensure that there are sports tourism qualifications at all levels. Further to this, CATHSSETA will develop a database of volunteers as required in the NSRP and ensure that these volunteers are trained for the success of international sports events in South Africa.
Travel & Tourism	National Tourism Sector Strategy	The strategic objectives are organised into three (3) themes, namely, to grow the tourism sector and economy, to enhance visitor experience and to achieve sustainability and governance. Some of the key focus areas within these themes include people development and relevant capacity building. The role of CATHSSETA is therefore to identify training needs and offer training programmes that are aligned to the needs in the sector, with the emphasis on developing and improving skills within the sector.
	National Rural Tourism Strategy	Informed by the National Tourism Sector Strategy and the Domestic Tourism Growth Strategy, this strategy prioritizes tourism development in rural economies by supporting enterprise development, skills development and training initiatives in the tourism sector. CATHSSETA, through its partnerships and strategic alignments, responds positively in the support of rural development initiatives through special projects as well as extending its operational presence across various regions.
	Tourism Act, 2014	The Act regulates the Tourist Guide profession, gives value and the importance of the tourist guiding sector. It also provides for the registering of tourist guides thus recognizing it as a profession with a defined career path. CATHSSETA, together with relevant partners, is responsible for identifying the training needs as well as the certification and registration of the Tourist Guides.

2.4. Conclusion

This chapter has successfully identified factors that are driving change in the sector such as technology and globalisation and the influence these have on skills demand and supply. Changes in occupational patterns and structures are seen in the profile of skills now required by employers in the sector. This is demonstrated by a requirement for human resources with increased efficiency in using technology. In addition, employers need a more flexible skills base to be able to adapt to competing environments. The implications of National Plans and Strategies for skills planning in the sector are vast. These include focus on TVET colleges, a greater emphasis on partnerships with employers, focus on quality training and transformation within the sector.

CHAPTER 3

EXTENT OF SKILLS MISMATCH

CHAPTER 3: EXTENT OF SKILLS MISMATCH

3.1. Introduction

This chapter focuses on the scope, magnitude and nature of both demand and supply of skills within the CATHSSETA sector. The main aim is to establish an understanding of occupation specific skills mismatches and skills gaps. The chapter comprises of the following four sections:

- Extent and nature of demand
- Extent and nature of supply
- Identification of skills gaps
- PIVOTAL list

The methodology employed utilises a combination of both quantitative and qualitative research techniques. The quantitative approach includes the collection and analysis of data submitted by employers through the Mandatory Grant application process, data sourced from the Department of Higher Education and Training as well as data from the CATHSSETA quarterly monitoring reports. Cross sectional analysis has been conducted to establish vacancies and occupations difficult to fill, enrolments and graduations as well as other supply side information presented in the chapter. Further qualitative methods were used by way of focus group sessions and consultative sessions with stakeholders across the six sub-sectors. The relevant qualitative findings have been compared to the quantitative results and the information presented in the sections that follow are a culmination of such.

Further research efforts are currently underway with labour market research being undertaken in the Arts, Culture and Heritage, Gaming and Lotteries, and the Sport, Recreation and Fitness sub-sectors.

3.2. Extent And Nature Of Demand

3.2.1. Vacancies in the sector

Analysis of the vacancies per sub-sector are presented in Table 6 below. These are presented as "Top 5 vacancies" which are defined to be the highest number of current vacancies, combined with the degree of scarcity. These are presented as submitted by employers participating in the levy-grant system.

Table 6: Top 5 vacancies per sub-sector

Sub-sector	Occupation
Arts, Culture & Heritage	Light Technician
	Multimedia Specialist
	Museum Manager
	Event Producer
	Arts and Culture Manager

Sub-sector	Occupation
Conservation	Park Ranger
	Environmental Scientist
	Conservation Scientist
	Marine Biologist
	Environmental Manager
Gaming & Lotteries	Gaming Manager
	Betting Agency Manager
	Bookmaker's Clerk
	Gaming Worker
	Reservations Manager
Hospitality	Chef
	Waiter (Sommelier)
	Café (Licensed) or Restaurant Manager
	Cook
	Catering Production Manager
Sport, Recreation & Fitness	Sports Development Officer
	Fitness Instructor
	Fitness Centre Manager
	Biokineticist
	Sales and Marketing Manager
Travel & Tourism	Travel Consultant
	Inbound Contact Centre Consultant
	Outdoor Adventure Guide
	Tour Guide
	Operations Manager (Non-Manufacturing)

Source: CATHSSETA SMS 2016

Arts, Culture & Heritage: The Light Technician and Multimedia Specialist occupations were amongst the top five vacancies reported in the previous year, with the former having the most vacancies. The Archaeologist and Arts and Culture Manager occupations occupy the third and fourth positions respectively. Both these occupations have not appeared in the previous years.

Conservation: The Park Ranger and Environmental Scientist reportedly have the highest vacancies in the current year. These occupations, together with the Tour Guide occupation are new entrants in the list of top five vacancies this year. The Conservation Scientist and Diver occupations now have more vacancies compared to last year and currently occupy the fourth and highest in the list.

Gaming & Lotteries: The Gaming Worker and Betting Agency Manager occupations have the highest vacancies in the sub-sector as observed in the past two years. Two occupational vacancies reported this year are the Electronic Engineering Technician and General Clerk.

Hospitality: The Chef occupation remains the top occupation in terms of vacancies. This occupation is listed as a trade and has been the focus of many CATHSSETA interventions. It is important to note that alternative job titles or specialisations such as pastry chef, sous chef and executive chef, to name a few, fall within this OFO occupation and that the vacancy is inclusive of these specialisations.

Sports, Recreation & Fitness: The Sports Coach or Instructor and Fitness Instructor occupations which rank first and second respectively are amongst the top vacancies that have been reported by employers over the past three years. These vacancies are predominantly due to the lack of formally qualified personnel which is currently being prioritised via RPL.

Travel & Tourism: The Travel Consultant occupation still ranks as the top vacancy within the sub-sector. Feedback of employers however, indicates that the vacancy is within a senior travel consultant level which requires a combination of both the relevant qualification as well as the necessary industry specific experience.

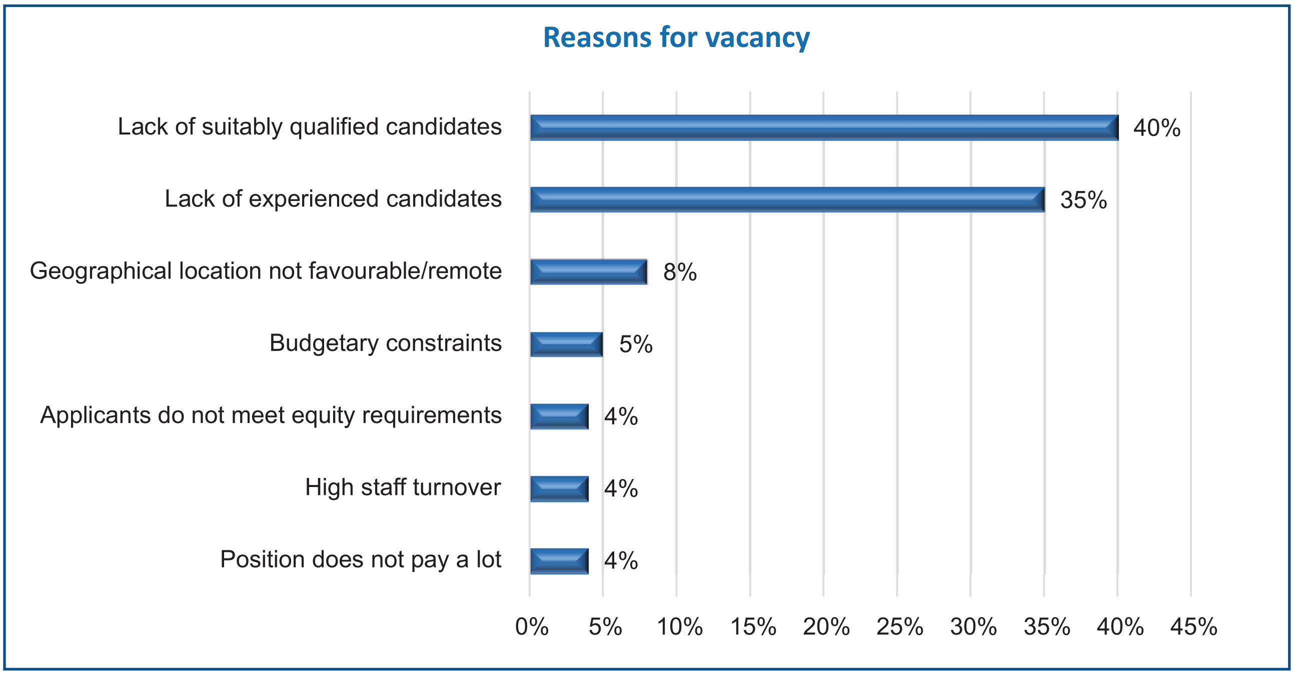


Figure 10: Reasons for vacancy
Source: CATHSSETA SMS 2016

Vacancies remain unfilled for mostly three to six months (36%), followed by up to three months (29%). Very few vacancies remain unfilled for longer than nine months, with the exception of the Hospitality sub-sector which experiences vacancies for up to a year specifically for the Café or Restaurant Manager occupation. Figure 10 above indicates the reasons vacancies are difficult to fill. According to employers vacancies are difficult to fill largely due to a lack of suitably qualified and experienced candidates. This was the main reason cited by stakeholders in all but the Sport, Recreation and Fitness sub-sector where a lack of qualifications was stated as another dominant reason for vacancies. This is consistent with the structural unemployment that the country faces, where unemployment arises as a result of a mismatch between skills demand and skills required for job openings or a mismatch between skills required in a specific geographic area versus the availability of skills in that particular area. This was observed across all the sub-sectors with geographical location a big factor for the Hospitality sub-sector only.

3.2.2. Occupations hard-to-fill

The data obtained from MG applications identified the following hard-to-fill vacancies, some of which were substantiated with findings from research conducted amongst our stakeholders.

Arts, Culture & Heritage: The Light Technician and Multimedia Specialist occupations have a vacancy period of 6 to 9 months. According to employers, the lack of suitably qualified people is the main reason these occupations are difficult to fill. Most of the employers require employees in these occupations to have at least a certificate or diploma. This could also be an indication of the lack of relevant training in these fields, which is exacerbated by the high cost associated with retraining staff.

Conservation: The Environmental and Conservation Scientist occupations remain unfilled for longer periods i.e. between one to two years. This may be a reflection of the minimum requirements to fill these positions – a degree and relevant work experience for a year. Furthermore, employers seek employees who have skills at junior to middle management level making it difficult for graduates without work experience to enter the industry. The Diver occupation is the only one that remains hard to fill due to lack of experienced candidates and also has a shorter vacancy period i.e. less than three months.

Hospitality and Gaming: Hard-to-fill occupations within the Hospitality sub-sector includes Chefs, Waiter and Café (Licensed) or Restaurant Manager. Lack of suitably qualified and experienced candidates means that vacancy periods range from less than one to six months. Employers require at least a matric or a certificate/diploma and work experience of one to three years for the Chef and Restaurant Manager occupations. Most occupations within the Gaming sub-sector have a vacancy period of less than six months and require at least a Matric, for the Betting Agency Manager and Gaming Worker occupations. Other hard to fill occupations include Electronic Engineering Technician and Electronic Equipment Mechanician.

Sports, Recreation & Fitness: The Fitness Instructor, Sales Manager, Biokineticist and Fitness Centre Manager occupations have been identified as hard-to-fill occupations. These occupations have the shortest vacancy period of less than three months and require at least six months of work experience. However, lack of work experience and qualifications are cited as the main reasons these occupations are hard to fill. The lack of qualifications as well the employment equity requirements aimed at transforming the sector could still be making these occupations difficult to fill.

Travel & Tourism: The Travel Consultant, Inbound Contact Centre, Outdoor Adventure Guide and Tour Guide are considered hard-to-fill occupations. Employers prefer employees with at least a certificate or diploma and skills/experience at junior to middle management. Furthermore, the delay in updating curriculum such that it is specific and addresses the needs of the industry contribute to these positions being hard to fill.

3.2.3. Occupational wage trends

Statistical data indicating wage trends of the sector is limited. For example, within the SRF sub-sector most people earn individualised salaries based on their skills. In soccer, cricket and rugby clubs, players are paid according to the value the club attaches to them, usually on a contract basis. The same applies for other occupations such as coaches and technical assistants. In the ACH sub-sector, which includes the music industry, musicians are predominantly employed on a part time basis and are generally on the lower end of the remuneration scale. Ensemble music generally requires subsidisation to survive, which is not uncommon internationally. Needletime (which are royalties arising from performance of a recording in public) is another revenue stream. Other revenue sources within the industry include income from performing rights, royalties from theatre and sheet music.

Information from Career Junction, PNET and Payscale was used to give an indication of the wage trend for most of the occupations in the Arts, Culture and Heritage, Gaming and Lotteries, and Sport, Recreation and Fitness sub-sectors. Above average inflation wage increases were found mostly within the Manager, Professional and Technician occupational levels across all 3 sub-sectors. For example, within ACH, the occupations within the Managerial level have the most significant wage growth between 7 to 12%. However, these were for generic occupations such as General Manager, HR Manager, etc. The wage growth of sub-sector related occupations (e.g. Painter, Composer, etc.) within the Skilled/Craft trades major group ranged between 7 – 9 %. Within SRF sub-sector, wage growth was the highest amongst the professional occupation level, ranging between 8 and 15%. Unlike the GL and ACH subsectors, a significant number of sector-related occupations were identified as having significant wage growth rates. These included occupations such as Sports Coach, Biokineticist, and Sport Development Officer which have been reported by employers as hard-to-fill vacancies over the past two to three years.

The Hospitality sub-sector's minimum wage has been adjusted upward with effect from 1 July 2015. The new wage adjustments are applicable until 30 June 2016. In terms of the Sectoral Determination, which prescribes minimum wage rates and conditions of employment in the sub-sector, the new rate increases are demarcated into two: employers with 10 or less employees have a new minimum rate which will apply as follows: monthly rates of R2 760.59; weekly rates of R637.10 and hourly rates of R14.15. While the minimum wages for employers with more than 10 employees will apply as follows: monthly rates will of R3 076.98; weekly rates of R710.12 and hourly rates of R15.77. It is to be noted that although official statistics are not available, there are large disparities between salary levels in the hospitality industry. The tourism industry, like the hospitality industry, is not considered a good employer, as the wages are often quite low, the hours of work long and real career progression opportunities few.

3.2.4. Occupational employment trends

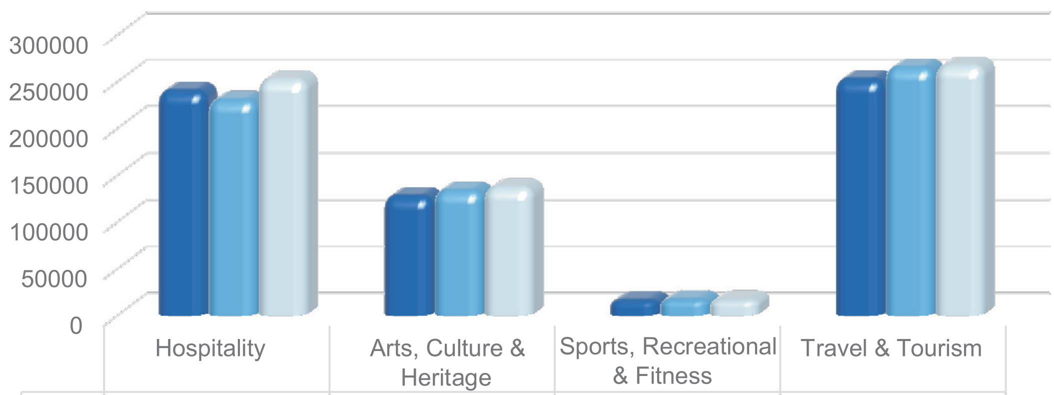
In order to examine the occupational employment trends, analysis of the latest Tourism Satellite Account (TSA) (2016) has been conducted. This report, the latest (2016) report provides final figures for the 2012 period and provisional 2013 and 2014 figures. In order to assess employment trends, the three year period has been reviewed.

It is key to note that the tourism sector is not measured as a separate sector in South Africa due to the lack of clear definition in the International Standard Industrial Classification (ISIC). The sector rather is viewed as a combination of industries such as transportation, accommodation, food and beverage services, recreation and entertainment, travel agencies, etc. The rationale behind this classification is the fact that industries are classified according to the goods and services they produce, while tourism is a consumption-based concept that depends on the status of the consumer. In addition to this, tourism consumption includes 'tourism-characteristic' (i.e. accommodation, travel services, cable cars, etc.) and 'nontourism-related' (i.e. retail trade) goods and services, which deliver their services largely to non-tourists (Statistics South Africa, 2016).

Thus, in examining employment trends of the sector in the figure which follows, industries such as accommodation, food and beverage, road passenger transport, air passenger transport, transport equipment rental, cultural, sport and recreational and retail of tourism connected goods have been included.

From Figure 11, the sector as a whole has seen an increasing trend in employment from 2012 to 2014. Examination of individual industries however indicates that there has been a decrease in employment in the accommodation and sport and recreational industries.

Employment trend of sector 2012 - 2014



	Hospitality	Arts, Culture & Heritage	Sports, Recreational & Fitness	Travel & Tourism
2012	240628	127860	16144	252867
2013	230669	133848	16960	265346
2014	252473	137194	16676	267305

Figure 11: Employment trend of sector from 2012 to 2014
Source: Adapted from Tourism Satellite Account (2016)

Analysis of the general employment characteristics of the sector indicates that employment usually takes the form of both formal and informal employment. The Hospitality and Travel & Tourism sub-sectors are characterised by higher proportions of both elementary and managerial staff with a high percentage of this staff made up of White males in managerial positions. The workforce is typically reflected by a younger workforce age profile with a significant number of people with the requisite skills nearing the retirement gap which in itself is a cause of concern as there will be a loss of important skills. Recruitment difficulties can lead to inexperienced staff being recruited which then impacts on workforce skill levels and productivity. Constant recruitment and retraining can be costly. However, as employers in the sector (the hospitality element in particular) have traditionally operated with high labour turnover, many do not see it as a problem.

The ACH sub-sector is predominantly self-employed driven with few main stream/ formal jobs of which the majority of those are government entities or state owned. A key characteristic of this sub-sector is that fragmentation in the sub-sector is ripe. It is also noted that the separation of SETA sectors in terms of the Standard Industrial Classification codes attribute to this fragmentation as evidence by the distribution of the sub-sector across three different SETAs. It therefore makes it difficult to gather information that represents the true status in terms of the economic and labour market performance as well as servicing the sub-sector in its entirety in terms of developing skills or addressing skills shortages that exist.

The SRF sub-sector has few job opportunities and most federations rely on the services of volunteers. As these volunteers are not remunerated and the National Federations they belong to are exempted from paying the skills levy, the skills needs of these volunteers are not captured. This reiterates the characteristic of the sector of informal, temporary employment. The sub-sector employs a relatively low number of full time paid employees as the industry is driven by a large number of volunteers working in Sport/Recreational Clubs, Federations and Associations. This is further compounded by the fact that numerous employees in the sector are employed by provincial and local governments who are reported as government employees to Public Sector Education and Training Authority (PSETA) and Local Government Sector Education and Training Authority (LGSETA). This practice significantly distorts the number of employees reported and makes it difficult to assess the labour market performance of this sub-sector. The same applies to the Conservation sub-sector where some of the data regarding the number of people employed and the size and growth of this sector resides in other SETAs (LGSETA, PSETA).

The implications of the above factors for skills development in the sector are vast. As Small, Medium and Micro Enterprises (SMMEs) make up the majority of the sector, skills aimed at firstly assisting with start-up of businesses and secondly sustainability of these businesses are of critical importance. One important aspect is the integration of talent and skills development. Within both SRF and ACH sub-sectors, talent plays an important role. These sub-sectors comprise performers, celebrities, sporting legends, etc. Participants in these sub-sectors seek international acclaim and aspire to perform or compete in the global arena. An implication of this is that skills development would need to not only consider skills, but also provision of access to such global events or experiences in support of the growth of these sub-sectors. Another skills development implication is as a result of the employment characteristics of the sector.

3.2.5. Conditions of employment

The sector has traditionally suffered from perceptions of low salaries, unsociable hours and poor conditions, which can make it difficult for employers to attract talent. The Hospitality sub-sector generally suffers from the highest rate of labour turnover of all sectors of the CATHSSETA scope. This is partly due to a reliance on a transient workforce of students and non-South African workers. The constant need to replace job leavers leads to high levels of skills gaps as it means there are always a large number of new recruits developing into their roles. Furthermore, the temporary employment profile of the sector implies both short occupational lifespans and causes difficulties with defining career paths.

3.2.6. Impact of migration

The impact of migration is seen particularly within the Tourism and Hospitality sectors, where the occupations falling into the Service and Sales Worker OFO major group like the waiter and bartender occupations have a significant amount of non-South African workers. The exact measurement of the extent of this employment however, is limited due to absence of official statistics.

3.3. Extent and Nature of Supply

In order to determine the supply of skills within the sector, skills within the sector, (HEMIS) data, publications data, publications from DHET, Mandatory Grant data submitted by employers and the CATHSSETA annual report have been analysed.

3.3.1. Extent of occupational skills supply

The education profile of employees in the sector is presented in the table which follows.

Table 7: Education profile of employees per sub-sector

Sub-sector	Education level	Employees	Percentage
Arts, Culture and Heritage	ABET/AET	59	2.73%
	NQF 1,2	425	19.63%
	NQF 3,4,5,6	1 178	54.41%
	NQF 7,8,9,10	503	23.23%
	Total	**2 165**	
Conservation and Tourism Guiding	ABET/AET	2 143	24.50%
	NQF 1,2	2 486	28.42%
	NQF 3,4,5,6	3 230	36.92%
	NQF 7,8,9,10	889	10.16%
	Total	**8 748**	
Gaming and Lotteries	ABET/AET	490	1.76%
	NQF 1,2	2278	8.16%
	NQF 3,4,5,6	23 544	84.36%
	NQF 7,8,9,10	1 597	5.72%
	Total	**27 909**	
Hospitality	ABET/AET	11721	8.55%
	NQF 1,2	38 214	27.87%
	NQF 3,4,5,6	81 373	59.34%
	NQF 7,8,9,10	5 824	4.25%
	Total	**137 132**	
Sport, Recreation and Fitness	ABET/AET	464	2.97%
	NQF 1,2	1 123	7.18%
	NQF 3,4,5,6	13 021	83.27%
	NQF 7,8,9,10	1 030	6.59%
	Total	**15 638**	
Tourism and Travel Services	ABET/AET	312	1.76%
	NQF 1,2	1 289	7.26%
	NQF 3,4,5,6	14 603	82.20%
	NQF 7,8,9,10	1 562	8.79%
	Total	**17 766**	

Source: CATHSSETA SMS 2016

Analysis of Table 7 indicates the following:
The majority of employees within the sector fall within the middle level skills band, i.e. at NQF levels 3-6. This is followed by employees within the low level skills band at NQF levels 1 & 2. The high occurrence at the middle level skills category is indicative of the various types of occupations in the sector which are typically in the middle management and professional OFO major groups.

The G&L, T&T and SRF sub-sectors have the highest percentage of employees within the middle level skills category. The occupations within these sub-sectors are typically in the middle management and clerical support workers OFO major groups. This spread is further supported by the industry requirement of employees to have at least a Matric (for G&L) and a diploma or certificate (for T&T and SRF). Furthermore, competition for vacancies is high in this sub-sector which often leads to the candidate with the highest qualification and most appropriate experience being hired, which further accounts for the majority of employees having middle level skills and qualifications at NQF levels 3, 4, 5 and 6. The ACH, Conservation and HOSP sub-sectors, whilst having a majority of employees at the middle level of skills, also have a significant percentage of employees at the low level of skills, encompassing both ABET/AET and NQF levels 1 and 2.

Artisans within the CATHSSETA sector include a multitude of trades, some of which are the chef, butcher, confectionary baker, tailor, toolmaker and welder trades. The only sector specific trade is that of the chef. Analysis of this occupation is illustrated in the figure which analyses the occupation in terms of the race demographic.

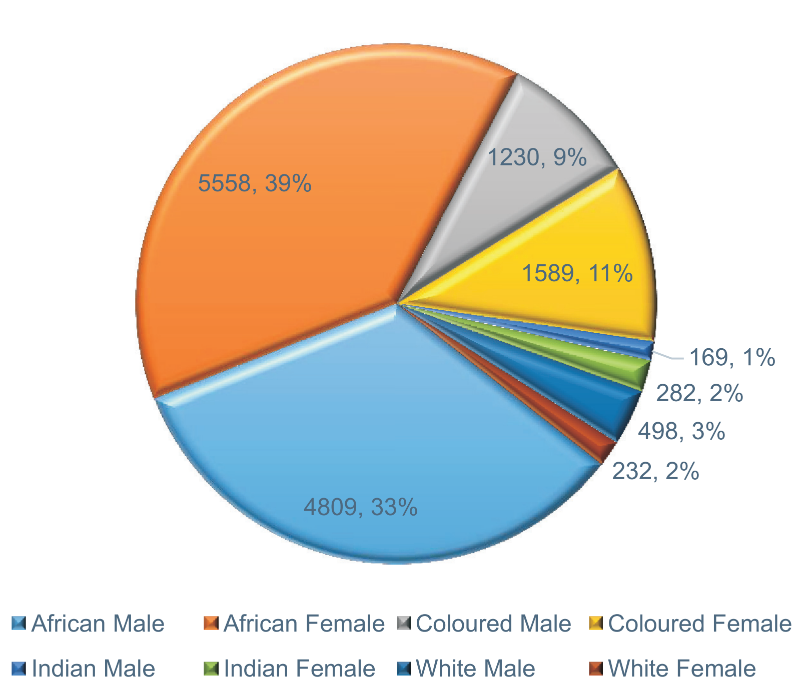


Figure 12: Demographic analysis of the Chef trade
Source: CATHSSETA SMS 2016

As per Figure 12, the sector employs a total of 14 367 Chefs. This figure is based on the Mandatory grant data from employers. The number of Chefs has decreased by approximately 12% from 16 455 reported in the 2015 period. Black African males and females make up the majority of chefs in the sector.

3.3.2. State of education and training provision

The (HEI) data sourced from the Department of Higher Education and training was analysed for the 2013 and 2014 periods.These figures are based on the headcount of unduplicated student enrolments and graduations according to the second order Classification of Educational Subject Matter (CESM) category of major(s)/area of specialisation and qualification type. The number of enrolments and graduates are presented in Table 8 below.

Data for the 2015 period will be made available in August 2016

Table 8: HEI enrolments and graduations per sub-sector per qualification area

Sub-sector	Qualifications	2014		2013	
		Total Enrolment	Total Graduates	Total Enrolment	Total Graduates
Arts, Culture & Heritage	Dance	401	98	369	72
	Design and Applied Arts	3 424	861	3 543	821
	Drama/Theatre Arts	2 085	506	2 140	521
	Film/Video and Photographic Arts	1 072	306	1 142	365
	Fine and Studio Art	3 605	686	3 138	650
	Music	2 572	507	2 774	494
	Visual and Performing Arts, Other	415	135	404	119
Conservation	Botany/Plant Biology	1 961	345	1 721	324
	Zoology/Animal Biology	1 834	334	1 692	313
	Ecology, Evolution, Systematics and Population Biology	1 474	415	1 601	451
Hospitality	Food Science and Technology	1 903	422	1 611	374
	Hospitality Administration/ Management	7 393	1 379	7 383	1 318
	Foods, Nutrition and Related Services	1 767	270	1 354	208
Sport, Recreation & Fitness	Parks, Recreation and Leisure Facilities management	3 017	592	2 966	671
	Movement and Mind-Body Therapies and Education	27	4	42	11
Travel & Tourism	Entrepreneurial and Small Operations	3 017	476	3 286	437
	Business Administration, Management and Operations	84 170	13 081	77 996	12 912
Total		**120 137**	**20 417**	**113 162**	**20 061**

Source: DHET HEMIS data 2013-2014

Statistics on Post School Education and Training in South Africa: 2014, released by DHET in 2016 has been analysed in order to establish the number of TVET College learners registering and completing sector specific NC (V) and Nated (N6) qualifications in the 2014 period. Tables 9 and 10 shows the breakdown in terms of qualifications. These figures include both public and private TVET Colleges and show that completion rates across the two programmes are 45% and 43%.

Table 9: TVET N6 registrations and completions per sector qualification area

Report 190/1 N6 Part-Qualification	2014		
	Total Registered	Total Completed	Completion rate
N6: Art and Design	261	135	52%
N6: Hospitality and Catering Services	1 076	473	44%
N6: Popular music: Composition	0	0	0%
N6: Popular Music: Performance	24	6	25%
N6: Popular Music: Studio Work	28	13	46%
N6: Tourism	993	441	44%
Total	**2 382**	**1 068**	**45%**

Source: DHET Report 2016

Table 10: TVET NC (V) L4 registrations and completions per sector qualification area

NC (V) Level 4 Programme	2014		
	Total Registered	Total Completed	Completion rate
L4: Hospitality	1 508	532	35%
L4: Tourism	1 494	756	51%
Total	**3 002**	**1 288**	**43%**

Source: DHET Report 2016

From the 14 universities and universities of technology that offer hospitality and tourism it is important to note that certain qualifications that were formally offered only at the higher levels draw students from more generic lower level qualifications in which a range of sub-specialisation options include eco-tourism management, outdoor recreation management, indigenous tourism development, events management and destination management. Another very important source of skills for the sector is industry itself. The main methods of training utilised are in-house training and work-shadowing, both being extremely practical and job and work-place specific, and combining training with the work-experience considered so important by the employer. It is difficult to determine with accuracy the supply of skills into the labour market that are able and necessary to support a growing and transformative tourism and hospitality sector. The supplier driven nature of training within the sector further serves to reinforce misalignment between skills demand and supply. The general challenges associated with skills development among time-constrained owner-operator enterprises, must be seen to apply to the sector as a whole, due to its overwhelming SMME profile.

Training capacity in the SRF sub-sector is mainly provided by universities and universities of technology. These HEIs offer a variety of degrees and diplomas that are relevant to the SRF sub-sector but it must be noted that there are no programmes in the TVET Colleges that are relevant to this sub-sector. Besides formal educational institutions as accredited by the Council on Higher Education (CHE) and UMALUSI, CATHSSETA has accredited private providers to offer SRF programmes although there is still a need to increase the number of providers as there are very few or no accredited training providers in certain provinces. In order to counter this deficit, the capacity of the public TVET system will have to be developed to offer a full spectrum of CATHSSETA qualifications.

3.3.3. Supply problems experienced by firms

Supply of tourism specific skills into the South African tourism sector takes place both formally and informally, and through a range of different agents. These agents include qualification, curriculum and training providers which take the form of the TVET colleges, HEIs, private training providers and industry training. The available information on demand for skills within the tourism sector indicates that the range of skills required are not confined to those generally regarded as 'tourism, hospitality and gaming' skills. A larger proportion of demand lies outside of such a classification: the more generic 'skills' required to underpin a service ethic; the skills required to manage individual tourism product and service enterprises as well as the departments and agencies supporting such enterprises, the skills required to communicate effectively both verbally and non-verbally across cultural and language divides; entrepreneurial skills as well as technical skills such as cooking.

Within the Conservation sub-sector, there is a scarcity of qualified graduates at NQF levels 7, 8, 9 and 10, where vacancies remain unfilled due to a lack of suitably qualified graduates. Training provision in this sub sector is mostly private provider driven. There exists challenges across all levels of education from foundational learning especially for biodiversity through to preparing for access to higher learning for biodiversity into the workplace. Therefore the current measures that are in place are proving to be inadequate and more needs to be done to change the current scenario.

3.4. Skills Gaps

In investigating the Scarce and Critical skills in the sector, the following definitions have been utilised.

Scarce Skills - Refer to those occupations where there is a scarcity of qualified and experienced people, currently or anticipated in the future, either because:

- o such skilled people are not available (absolute scarcity); or
- o they are available but do not meet employment criteria (relative scarcity).

This scarcity can arise from one or a combination of the following, grouped as relative or absolute:

- **Absolute scarcity:** suitably skilled people are not available, for example:
  - o A new or emerging occupation, i.e. there are few, if any, people in the country with the requisite skills (qualification and experience) and education and training providers have yet to develop learning programmes to meet the skills requirements.
  - o Firms, sectors and even the country are unable to implement planned growth strategies and are experiencing productivity, service delivery and quality problems directly attributable to a lack of skilled people.
  - o Replacement demand would reflect an absolute scarcity where there are no people enrolled or engaged in the process of acquiring the skills that need to be replaced.
- **Relative scarcity:** suitably skilled people are available but do not meet other employment criteria, for example:
  - o Geographical location, i.e. people are unwilling to work outside of urban areas.
  - o Equity considerations, i.e. there are few if any candidates with the requisite skills (qualifications and experience) from specific groups available to meet the skills requirements of firms and enterprises.
  - o Replacement demand would reflect a relative scarcity if there are people in education and training (formal and work-place) who are in the process of acquiring the necessary skills

(qualification and experience) but where the lead time will mean that they are not available in the short term to meet replacement demand.

3.4.1. Scarce skills methodology

CATHSSETA utilises a combination of data and labour market signals to both monitor and determine the scarce and critical skills in the sector. Some of the data and signals used and observed are:

- All enterprises submitting Mandatory Grant applications (which comprise of the Planned training interventions and Reported training) completed a section on scarce and critical skills in their sub-sectors
- The number of vacancies and difficult to fill positions in the sector
- The pool of unemployed skilled people

Thus, the methodology used to determine the scarce and critical skills incorporates the following:

- o Data collected from Mandatory grant application submissions
- o Input from joint working committees and focus group sessions
- o Surveys conducted nationally

All data and input are in the form of the 6 digit OFO. Scarce skills are identified as a function of two variables: total number of vacancies identified and degree of scarcity.

f(x,y); x = total number of vacancies identified, y = degree of scarcity

A preliminary list is generated, categorised and mapped using the six digit OFO, NQF level, interventions to address the scarce skill. This preliminary list is further subject to stakeholder consultations, prior to generation of a final list of scarce skills for the sector.

3.4.2. Scarce skills list

Table 11: Scarce Skills List

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED	QUANTITY NEEDED	Quantity to be supported by SETA	0-100	101-1000	1001 & ABOVE
					Y/N					
MANAGERS	2015-112101	Director (Organisation)	Funding of Business Administration Bursary; Funding of Generic Management Learnership	8	Y	55	55	X		
MANAGERS	2015-134901	Environmental Manager	Internship and workplace experience (SIPS)	6	Y	30	30	X		
MANAGERS	2015-141101	Hotel Manager	Bursary: Management and Development Programme	6	Y	50	50	X		
MANAGERS	2015-141203	Catering Production Manager	Bursary: Catering & Professional Cookery	6	Y	105	105		X	
MANAGERS	2015-141204	Reservations Manager	National Diploma: Hospitality Management	6	Y	40	40	X		
MANAGERS	2015-143101	Betting Agency Manager	Learnership: Generic Management	6	Y	41	41	X		
MANAGERS	2015-143102	Gaming Manager	Learnership: Generic Management	5	Y	50	50	X		
MANAGERS	2015-141201	Restaurant Manager	Bursary: Food & Beverage studies	6	Y	54	54	X		
MANAGERS	2015-134909	Museum Manager	Bursaries (Heritage and Museum Studies)	6	Y	30	30	X		
MANAGERS	2015-143107	Fitness Centre Manager	Learnerships and Bursaries: Fitness Management qualification	5	Y	50	50	X		

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA	0-100	101-1000	1001 & ABOVE
PROFESSIONALS	2015-213107	Marine Biologist	BSc Oceanography and Maritime Studies. (Bursaries and Internships)	7	Y	25	25	X		
PROFESSIONALS	2015-213301	Conservation Scientist	Learnerships	7	Y	20	20	X		
PROFESSIONALS	2015-213302	Environmental Scientist	Bursaries: Environmental Science	7	Y	50	50	X		
PROFESSIONALS	2015-251301	Multimedia Specialist	Work Integrated Learning, Bursaries and Internships	6	Y	45	45	X		
PROFESSIONALS	2015-213307	Park Ranger	Learnerships: Natural Resource Guardianship Terrestrial	5	Y	100	100	X		
PROFESSIONALS	2015-243204	Event Producer	Learnerships; Skills Programmes & Bursaries (Event Management qualification)	6	Y	50	50	X		
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-342201	Sports Development Officer	FETC: Sports Administration (Learnership, Skills Programme and Internship); FETC: Community Recreation; Bursary: Sports Administration/ Recreation Leisure	4	Y	90	90	X		
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-342301	Fitness Instructor	Bursary, Learnerships and Skills Programmes: Fitness qualification	5	Y	113	113		X	
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-342302	Outdoor Adventure Guide	Adventure Site guide Skills Programme	5	Y	45	45	X		

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA	0-100	101-1000	1001 & ABOVE
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-343401	Chef	Learnerships: Professional Cookery	4	Y	500	500		X	
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-343902	Light Technician	Bursaries: NC Live event and Technical Productions	6	Y	65	65	X		
CLERICAL SUPPORT WORKERS	2015-421202	Gaming Worker	Learnerships: National Certificate: Gaming Operations	4	Y	105	105		X	
CLERICAL SUPPORT WORKERS	2015-421204	Bookmaker's Clerk	Learnership: Generic Management	3	Y	25	25	X		
CLERICAL SUPPORT WORKERS	2015-422102	Travel Consultant	Learnership: General Travel	5	Y	120	120		X	
CLERICAL SUPPORT WORKERS	2015-422201	Inbound Contact Centre Consultant	Learnership: General Travel	5	Y	35	35	X		
CLERICAL SUPPORT WORKERS	2015-441903	Program or Project Administrators	Workplace (SIPS)	6	Y	10	10	X		
SERVICE AND SALES WORKERS	2015-511302	Tour Guide	Learnerships: National Certificate in Tourism: Guiding	4	Y	120	120		X	

3.4.3. Critical skills list

CRITICAL SKILLS - Critical Skills will refer to specific key or generic and "top up" skills within an occupation. In the South African context there are two groups of critical skills:

- Key or generic skills, including (in SAQA-NQF terminology) critical cross-field outcomes. These would include cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, Information Communication and Technology (ICT) skills and working in teams.
- Particular occupationally specific "top-up" skills required for performance within that occupation to fill a "skills gap" that might have arisen as a result of changing technology or new forms of work organisation.

The list of critical skills presented in the table below were identified from consultations with stakeholders through focus group sessions and inputs from chamber joint working committee members:

Table 12: List of critical skills

Critical skills	Requirement
Financial Management	Budget, forecast, manage cash flow, understand financial statements and manage business metrics, general bookkeeping.
Writing and Directing	Writing and directing for film and television, specifically within the ACH sub-sector.
Computer Skills	Microsoft Word for word processing, Microsoft Excel to create spreadsheets, and PowerPoint for presentations.
Administration and Office Management	General administrative tasks, conducting meetings, writing minutes, preparing agenda and drafting reports.
Project Management	Plan and manage successful projects, manage risks, costs, time and project teams.
Marketing Skill	Promote, sell and attract spectators and athletes to be involved in sport, recreation and fitness programmes.
Sponsorship Management	Drafting sponsorship proposals, understand how to coordinate sponsor's ROI and to build marketing relationship with a sponsor, specifically within the SRF sub-sector.
Leadership and People Management	Attract, retain, motivate, coach and develop team members for high performance
Acting and Post Production	Acting and post production skills for film and television, specifically within the ACH sub-sector.
Coaching	RPL of existing practicing coaches at all level, specifically within the SRF sub-sector.
Customer Care	Customer care skills including interpersonal skills, product knowledge, and problem solving skills.
Communication	Basic verbal communication skills, ability to communicate clearly, effective written communication

3.4.4. Impact of shortages on firms

Supply and demand trends experienced by some of the sub-sectors have been sourced from the Career Junction Index (CJI) (2014). The table below indicates this trend over a 6 month period, where the first 3 months have been compared to the next three. The CJI is based on the following categories:

>100:	More job opportunities for potential career seekers; less potential career seekers per job advert; higher difficulty of recruitment due to less potential career seekers per job advert
= 100:	No changes regarding the potential career seekers per job advert ration; supply and demand are following the same trend.
<100:	Less job opportunities for potential career seekers; more potential career seekers per job advert; less difficulty of recruitment due to less potential career seekers per job advert

Table 13: Supply and demand trends

Industry	CJI	Supply trend	Demand trend
Arts & Entertainment	157	-7%	50%
Hospitality & Restaurant	108.80	2%	11%
Sport & Fitness	187.39	8%	96%
Travel & Tourism	92.57	-2%	-9%

Adapted from: Career Junction Index (2014)

Based on Table 13 above, the Travel and Tourism sub-sector indicates a negative demand and supply of jobs, indicating a less than 100 CJI. This means that this industry has less job opportunities and a decreasing demand for occupations within the industry. The Hospitality and Sport and Fitness industries have indices higher than 100 with both positive demand and supply. It is apparent that the demand far outweighs the supply, thus indicating a larger demand in job opportunities within these industries as compared to job opportunities available. The Arts and Entertainment industry has a high demand for job opportunities (50%), but however has a negative supply of jobs, indicating a huge disjuncture between demand and supply.

3.4.5. Employability of graduates in the sector

Graduates in this sector are generally viewed as not meeting employer expectations. The sector perception is that there is a skills mismatch with the knowledge graduates exit the higher education institutions with and the required competencies to get the job done. There is also an expectation from graduates in the sector that due to their level of education they should be in managerial positions whereas the industry values experience over qualification. Hence these graduates are largely frustrated and leave the industry for other prospects. This emphasises the need for more employers to participate in skills development through internships and work-integrated learning programs to enable graduates to gain the level of skills required in industry.

Graduates within the Arts, Culture and Heritage sub-sector face similar prospects as there are no full time employment opportunities for artists and actors. Thus the sector employs few graduates and these graduates are continuously competing for the few available job opportunities. Companies tend to spend more on other costs, such as salaries, perishables, etc. rather than on content production. Therefore no artists are permanently employed, creating a dysfunctional value chain in terms of job creation in the sector. There are only full time employment opportunities for arts administrators in the sector.

The Sports, Fitness and Recreation sub-sector displays a similar trend in that a few graduates are employed in the sub-sector. This is due to the fact that the sub-sector is dominated by volunteers and thus graduates compete for the available job opportunities. Though the labour market is recognizing that sport and recreation can be a career path, the prospects for young graduates remain grim. This is due to lack of experience by the graduates, sport organizations not recognizing the potential of young graduates as compared to older people with industrial experience and lack of opportunities for advancement.

3.5. PIVOTAL list

The CATHSSETA PIVOTAL list comprises the top 10 occupations that the SETA has identified as scarce and is informed by the larger list of scarce skills. The occupations listed in the PIVOTAL list are to be addressed by PIVOTAL programmes. The list provided in the table which follows provides the top 10 occupations in the PIVOTAL list and is not ranked in any particular order of priority.

The methodology utilised in identifying the occupations in the PIVOTAL list is as per the methodology outlined in section 3.4.1 where the analysis of the demand and supply of skills within the sector has been assessed utilising the Mandatory grant application data and inputs from focus group discussions with stakeholders engaged in the sector. The analysis and interpretation of these consolidated inputs are further enhanced with the research conducted by CATHSSETA and its partners.

Recognition of priority skills are founded on the occupations identified as scarce skills. The identified scarce skills are a function of two determinants; the number of vacancies in the sector and the degree of scarcity of the identified vacancies. This function was developed on the basis of the behavioural relationship between vacancies and scarcity, to scarce skills. Demand estimates, in terms of quantities needed, were calculated through time-series forecasts that use the time-ordered sequence of historical observations on a variable to develop a model for predicting future values of that variable. The simplest time-series forecast was a linear trend forecast where the generating process was assumed to be the linear model:

$$t_i = t_0 + a\% \times i_i$$

whereby t_i = future value of skills demand; t_0 = skills demand at time 0; i = [1,2] and a= average percentage increase (best fit).

Utilising the triangulation methodology for corroborating findings and as a test for validity, the occupations identified as scarce skills are further subject to consultation with sector stakeholders. Occupations identified as scarce in the previous five years are also considered prior to the final list of scarce skills being generated.

The interventions to address the occupations listed on the PIVOTAL list are based on input from consultative sessions with employers, joint working committees and regional managers. Further analysis in terms of availability of qualifications or relevant training programmes are considered prior to finalisation of the listed interventions. In compliance to the SETA Grant Regulations, 80% of the CATHSSETA available Discretionary Grants are allocated to PIVOTAL programmes that address scarce and critical skills in the sector. It is envisaged that through the identified interventions, the occupations listed will be addressed with funding directed to that particular area of study and training.

3.5.1. Top 10 PIVOTAL List

Table 14: Top 10 occupations on the PIVOTAL List

OFO MAJOR GROUP	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	Quantity to be supported by SETA
MANAGERS	2015-141203	Catering Production Manager	Food and Beverage Coordinator	Bursary: Catering & Professional Cookery	6	105
				Internships		
PROFESSIONALS	2015-213301	Conservation Scientist	Species Protection Officer	Learnerships	7	20
PROFESSIONALS	2015-213302	Environmental Scientist	Environmental Officer	Bursaries: Environmental Science	7	50
PROFESSIONALS	2015-213307	Park Ranger	Wildlife Conservationist	Learnerships – National Certificate: Natural Resource Guardianship Terrestrial	5	100
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-342201	Sports Development Officer	N/A	Learnership: FETC: Sports Administration; FETC: Community Recreation	4	90
				Skills Programme	4	
				Internship	4	
				Bursary: Sports Administration/ Recreation Leisure	4	
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-342301	Fitness Instructor	Health and Fitness Instructor	Learnerships: Fitness qualification	5	113
				Skills Programmes: Fitness qualification	5	
				Bursary: Fitness qualification	5	
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-343401	Chef	Chef De Partie	Learnerships: Professional Cookery	4	500

OFO MAJOR GROUP	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	Quantity to be supported by SETA
TECHNICIANS AND ASSOCIATE PROFESSIONALS	2015-343902	Light Technician	Lighting Operator	Learnerships: NC Live Event and Technical Productions	6	65
				Bursaries: NC Live Event and Technical Productions	6	
CLERICAL SUPPORT WORKERS	2015-421202	Gaming Worker	Gaming Operator	Learnerships: National Certificate: Gaming Operations	4	105
SERVICE AND SALES WORKERS	2015-512101	Cook	N/A	Skills Programme: Cook Convenience, Assistant Chef	3	800

3.6. Conclusion

This chapter focused on understanding occupation-specific skills mismatches for employers in the sector. A large majority of employment in the sector is within the low to middle level of skills, typical of the services industry. The supply of skills, however, takes place at all three levels: low, middle and high. This mismatch results in the disjuncture between supply and demand. Due to the skills shortages, firms are spending most of their resources in developing skills including in-house training. The issue of skills gaps in the sector has been presented in the form of a scarce skills list according to the Organising Framework for Occupations. A total of 32 scarce skills have been identified with the top 10 occupations falling under the PIVOTAL list listed in Table 14.

CHAPTER 4
SECTOR PARTNERSHIPS

CHAPTER 4: SECTOR PARTNERSHIPS

4.1. Introduction

The main focus of this chapter is on existing SETA partnerships with the aim of establishing the state of these and identifying the benefits and challenges experienced. The secondary aim is to discuss potential partnerships the SETA may form and how these will likely serve the SETA.

4.2. Existing partnerships

The SETA existing partnerships are arranged into four groups and thus the chapter will have these as sections:

4.2.1. State of existing partnerships

Public providers

Technical Vocational Education and Training (TVET) Colleges: There are 43 TVET Colleges across 55 campuses offering the National Certificate Vocational (NCV) in Hospitality and Tourism at Levels 2, 3 and 4. Some of the TVET Colleges have also obtained programme approval from CATHSSETA to offer CATHSSETA accredited NQF aligned qualifications. CATHSSETA has signed a MoU with each of the TVET Colleges to offer both bursaries and Learnerships, experiential learning as well as participate in the review of the NCV Hospitality and Tourism qualifications. The quality of training provided by the public providers is generally of a high standard. However, some public providers do face facility challenges, especially some of the TVET Colleges who are not given a sufficient budget to upgrade their training facilities.

CATHSSETA has partnered with 5 TVET colleges in order to establish regional offices. The main aim of establishing regional offices is to increase stakeholder support by becoming accessible more so in the rural areas. In the Free State, the regional offices are situated at Motheo TVET, which will also service the Northern Cape. Offices in the Eastern Cape, Western Cape, and KwaZulu-Natal are situated in the premises of Lovedale, Northlink and Umgungundlovu TVET colleges respectively. Offices in Limpopo are at the Capricorn TVET and these will also service the Mpumalanga province. Furthermore, CATHSSETA has entered into an agreement with King Hintsa TVET College to implement the Assistant Chef and Customer Care (level 4 and 5) programmes.

Higher Education Institutions (HEI) and Universities of Technology (UoT): CATHSSETA has partnered with HEIs in the provision of post graduate, Masters and PhD bursaries in order to promote research undertaken within the sector. CATHSSETA funds the bursaries, which covers the cost of tuition, books and accommodation. CATHSSETA has supported a number of learners with 13 (4 Masters and 9 PhD) currently pursuing their studies. The areas in which research is currently being undertaken by these bursary recipients include skills supply and demand, career pathways, sector information, career guidance, transformation imperatives, labour market, and experiential learning.

Employers: CATHSSETA, as required by Goal 2 of SETA's Strategic Plan and Annual Performance Plan, forms partnerships with employers on issues related to skills development to ensure that employees are capacitated to meet skills demands. One of the significant partnerships was with several employers (Divine Inspiration Trading, Ukweza Holdings, Fancourt t/a Plattner Golf, Shamwari Hospitality and North West Parks & Tourism Board) which provided for the training of 118 Chefs, one of the sector's scarce skills. The following table provides the employers per sub-sector that are in partnerships with CATHSSETA for the delivery of Learnerships and other Learning programmes.

Other SETAs: Partnerships with other SETAs, like the ETDP SETA and AgriSeta for qualifications in facilitator, assessor and moderator, and Horticulture respectively have been successfully concluded. Further partnerships are being explored.

Public entities:

Arts, Culture and Heritage: The chamber has entered into partnerships with the North West Department of Sports, Arts and Culture to train 50 employees in FETC: Heritage Resource Management.

Conservation: The chamber has entered into partnerships with Ezemvelo KZN Wildlife to provide training on Customer Care for 623 employees at NQF level 4 and 20 employees at NQF 5.

Sports, Recreation & Fitness: The chamber has entered into partnership with the Department of Public Works to train 1037 learners in the Expanded Public Works Programme (EPWP).

Travel & Tourism: The chambers currently has a partnership with the National Department of Tourism which focuses on the National Tourism Careers Expo (NTCE), collaborating on a Skills Audit and a Service Excellence Training Programme. The NTCE flagship programme has been significant in terms of profiling Tourism and its value chain products as employers of choice. The Skills Audit focusses on the Tourism and related sub-sectors and is part of the review of the Tourism Human Resources Development strategy.

4.2.2. Successful partnerships

Partnerships that have resulted in producing successful outcomes have been seen in the following areas:

Training provision: the following training, which occurred through partnerships with various stakeholders, has been successfully completed

- The partnership with the National Arts Festival resulted in most of the 20 unemployed learners who completed the Music Industry Sound Technology Skills Programme being employed in full time positions.
- Fifty employed learners were trained towards a qualification in Sports Administration in partnership with Sports and Recreation South Africa. About 339 were trained in partnership with SASCOC in Facilitator, Assessor and Moderator courses. These learners successfully completed the training.

Post Graduate bursaries: Since inception of the NSDS III, CATHSSETA has entered into partnerships with HEIs, specifically to provide bursaries to learners to pursue post graduate studies in the sector, with the intention of creating new knowledge and developing academic expertise in the sector. Of these partnerships, success stories have been seen with Rhodes University where a number of masters and PhD learners have produced research contributing to improved sector intelligence. Thus far, 23 recipients (17 at Masters level and 6 at PhD level) have completed their studies.

National Department of Tourism: CATHSSETA partnered with the National Department of Tourism in undertaking a Skills Audit as part of the review of the Tourism Human Resources Development strategy. The partnership will build understanding of the skills development needs in the Tourism sector.

4.2.3. Problems experienced with partnerships

The main challenge the SETA has faced with promoting research at post graduate level is the inability of students to keep to the approved research programme. As a result, the delivery of findings to the SETA is delayed and the use of findings may be limited given the need for more recent, up to date information. The partnerships that have been entered into for the development and review of qualifications also have certain challenges. Due to the voluntary nature of participation, setting aside time for assigned tasks, travel and logistics as well as delay in signing of contracts, finalisation of the qualification pose challenges. Partnerships with public entities are unique. Certain public entities are often reluctant to fund projects and expect the SETA to fund the project in its entirety. The roll out of projects is only monitored by the SETA and the appointed training provider and further involvement from the public entity's side, in exercising oversight is limited with a heavy reliance on the Training Provider.

The challenge the SETA faced with TVET colleges is the lack of infrastructure geared towards responding to SETA requirements, for example, lack of capacity to prepare relevant documents for programme approval.

4.2.4. Strengthening of partnerships

In order to strengthen partnerships, it is imperative to have more focussed engagements, for the SETA to better service current partnerships and clear determination of roles and responsibilities.

The SETA has provided support to train the staff at TVET colleges to further enhance capacity. Furthermore, the SETA has established offices at TVET colleges in five provinces to become easily accessible and thus enable close communication.

4.3. New Partnerships

The SETA is looking at forming partnerships with the following entities:

Public entities:

The SETA is exploring a partnership with the KwaZulu-Natal Department of Arts and Culture. This partnership will focus on establishing an Arts and Culture Academy as well as National Higher Education Institute for Physical Education (NHEIPE) in KZN. The aim of the Arts and Culture Academy is to develop indigenous arts and culture forms particularly in the marginalised communities. The NHEIPE initiative aims to contribute in the coordination of Physical Education teacher training and will be piloted in four colleges, namely, uMgungundlovu, uMfolozi, Esayidi and Majuba TVETs, where the Sport Coaching programme will be implemented.

CATHSSETA will also be partnering with Lukanji and uMgungudlovu Municipalities in the Eastern Cape and KwaZulu-Natal respectively. The partnership with these municipalities aims to provide residents with learning opportunities and workplace exposure. Thus, CATHSSETA will provide bursaries to 20 learners from Lukanji Municipality, and fund internships for 18 unemployed learners from uMgungundlovu Municipality.

A partnership with SASCOC and industry players has been identified to review the sport coaching qualification.

The partnership with NDT will see CATHSSETA collaborating on skills development initiatives, namely, Women Executive Management Training Programme and a Universal Accessibility Training Programme.

Various stakeholders:

Partnerships with universities, TVET colleges and sector employers are currently being explored. The aim of these is improve stakeholder participation in sector skills development activities. The partnerships will enable CATHSSETA and these stakeholders to collaborate on common areas of interest.

CATHSSETA is also looking at partnerships with various stakeholders to provide career guidance. The focus of the partnerships will be on providing learners with information tools that will assist them in making informed career decisions.

As part of the CATHSSETA strategic projects, priority sector events have been identified and the following have been planned: National Environmental Skills Summit in partnership with the Lewis foundation, Sports Conference in partnership with SASCOC, the National Tourism Careers Expo in partnership with the NDT, Free State Department of Economic, Small Business Development, Tourism and Environmental Affairs, the Standard Bank Joy of Jazz and the National Arts Festival.

4.4. Conclusion

This chapter has outlined the existing partnerships that the SETA has and has detailed the nature of these partnerships. In order to effectively deliver on the provision of learning programmes, CATHSSETA has partnered with employers, HEIs, TVETs, public entities and other SETAs. The successful partnership models, specifically those that have resulted in the review of sector qualifications are being replicated for the current year. Further collaborative measures are required in order for qualification development, implementation of inter-SETA qualifications, implementation of learning programmes, placement of learners in internships and capacitating the TVET sector.

CHAPTER 5

SKILLS PRIORITY ACTIONS

CHAPTER 5: SKILLS PRIORITY ACTIONS

5.1. Introduction

This chapter consolidates and presents the findings from previous chapters and reflects on priority actions for the CATHSSETA sector. The information and analysis from previous chapters have been reviewed to culminate in a response in the form of recommended actions that are realistic, consistent and achievable. This chapter provides a set of priority actions and is not a detailed strategic or operational plan. Consideration of National Strategies and Plans has also been taken into account to ensure alignment with government's priorities.

5.2. Findings from previous chapters

The key findings from previous chapters have been summarised in the following table.

Table 15: Key findings

Chapter	Key findings
Chapter 1	• The Tourism sector is a key driver of economic growth contributing R375.5 billion to the country's GDP in 2015 and an increase in direct employment by 3.4% in 2015. • The Hospitality sub-sector employs the largest workforce in the sector. • The Northern Cape province employs the least number of people in the sector. • There exists a high concentration of employees and employers in Gauteng, Western Cape and KwaZulu-Natal provinces. • Male employees dominate the Managers and Professionals major groups while a majority of females occupy the Services and Sales Workers, Clerical Support Workers and Elementary Occupations major groups.
Chapter 2	**Change drivers** • There has been an increased use of internet services, electronic and mobile technologies across the sector. • Technology has resulted in a skills-biased technological change. The implications is that functional and technical skills will need to be accompanied by technology skills • Social networking, marketing, e-commerce and digital marketing have become increasingly more mainstream in use to attract and retain customers. • Globalisation has brought about a more "sophisticated tourism market". • As a result of changes in the sector, the demand for higher quality products and services are on the rise. This necessitates the required skills base to meet the changing demand. • Fast changing market conditions make it necessary for employers to remain competitive. • The revision of the Visa regulations is expected to be a positive change driver for the Tourism sector and impacts may be seen across the entire value chain. • Other change drivers include migration patterns which see a fair amount of foreigners employed within the sector. • There is a requirement for increased efficiency of human resources with the use of technology. • The demand for skills with components of technology or IT are growing. • Employers need a more flexible skills base, able to adapt to competing environments.

Chapter	Key findings
Chapter 3	**Demand for skills** • There has been an increasing occupational trend in the sector from 2012 to 2014. • SMMEs, which form a large part of the sector require skills for both start-up of businesses and sustainability of these businesses. **Supply of skills** • The majority of employees are in middle level skills band, between NQF levels 3-6. • A total of 120 137 learners entered programmes offered by HEIs in 2014 and a total of 20 417 graduated from HEIs in 2014 with sector specific qualifications. • Completion rates across the NC(V) and N6 TVET Colleges programmes are at 45% and 43% respectively. • The sector comprises a total of 14 367 artisans as chefs, a 12% decrease as compared to the 2015 period. **Skills gaps** • Supply and demand trends of the sector indicates that the demand for jobs outweigh the supply. • Graduates in the sector are generally viewed as not meeting employer expectations in terms of skills requirements. • The sector perceives there to be a skill mismatch between graduates and job requirements.
Chapter 4	• Partnerships with employers, HEIs, TVETs, public entities and other SETAs are imperative for learning programmes to be successfully delivered. • Successful partnership models which may be replicated include the review of qualifications, research partnerships and career guidance events to inform existing and potential entrants to the sector of available career opportunities and paths. • Further collaborative measures are required in order for qualification development, implementation of inter-SETA qualifications, implementation of learning programmes, placement of learners in internships and capacitating the TVET sector.

5.3. Skills priorities and actions

The key findings from the previous chapters and common feedback from stakeholder engagements, including chamber joint working committees have culminated in the following recommended actions:

Qualification review:

Qualifications offered at both TVET Colleges and HEIs, whilst deemed to be relevant in some of the sub-sectors, the general feedback from employers indicate that there is a need for review, particularly within the Travel and Tourism sub-sector. CATHSSETA in partnership with UMALUSI and NDT have completed the review of the NCV qualification for Hospitality and Tourism and the review task team has commenced with the actual revision of the curriculum. Education and training systems in the Tourism and Hospitality sub-sectors require alignment of curriculum with the needs of the industry. Industry feedback to CATHSSETA has been that graduates from higher education institutions are largely not able to transition smoothly into the workplace and this has resulted in the increase in a number of employers in the sector providing their own certificate courses that they feel cater to the needs of their respective businesses. The following focus areas are avenues through which education and training may be able to align with the needs of the industry:

- o Academic Advisory Boards of industry representation;
- o Real World Learning models (such as the Cornell Hotel school model)

- o Active learning methods (such as Problem Based Learning);
- o Group Work (communication skills)

This priority will be addressed through the review of legacy qualifications falling within the scope of the CATHSSETA sector.

Training provision:

There is a general lack of sufficient training providers in certain provinces within the ACH and SRF sub-sectors. The most optimal solution to this issue would be the development of the capacity of TVET Colleges to offer accredited courses relevant to the sector. Training provision for Conservation qualifications happens at HEI level i.e. there is no offering at TVET College level. TVET Colleges need to be capacitated to offer programmes relevant to the sub-sector as they act as a bridge and are affordable for those requiring to further their studies in but cannot afford going to universities or UoTs.

In order to address this, CATHSSETA will be monitoring compliance of accredited training providers and ensuring that accreditation applications are processed timeously. Licence agreements with various TVET colleges have been signed with the aim of increasing the availability of training provision in the sector.

Analysis of skills needs:

A full skills audit of the sector is required in order to enhance the data and information available on the sector. Results from focus groups engagements indicate that within the SRF sub-sector the following skills are critical:

- o Training of sports arbitrators, sports administrators, technical officials (team managers, referees/umpires), conditioning coaches and athletes. Athletics and wheelchair basketball coaches require urgent training
- o Life skills training including First Aid for athletes and officials
- o Leadership and governance training
- o Financial skills including fundraising skills
- o Computer literacy

In the Conservation sub-sector, the industry stakeholders identified fire management as a critical skill with training required at entry level.

The evolution of the Hospitality sub-sector requires the following skills to develop and improve the product offering to customers:

- o Customer skills
- o Computer skills

This is being prioritised through the various research projects – skills audit and labour market research being conducted. Continuous research efforts are necessary in order for the SETA to have credible and sufficient sector intelligence, to inform skills planning.

Work experience and experiential learning:

Work readiness programmes such as Internships and Work Integrated Learning (WIL) need to be intensified and properly structured to ensure that new entrants into the labour market are prepared and are able to have a competitive advantage. This takes place through PIVOTAL programmes like Learnerships, Internships and WIL.

TVET capacity building:

Training providers and lecturers at TVET Colleges need to be exposed to workplace experience in order to stay current in the classroom and thereby be enabled to provide better quality training to students. In order to intensify efforts towards capacity building CATHSSETA has and will continue training TVET lecturers on ETD programmes, licence CATHSSETA programmes to the colleges and train support for skills development training to lecturers.

Increased partnerships:

- o Partnerships between the education sector and employers facilitated by CATHSSETA are critical to improve the quality of education in the sector. Education and training systems should work closer with the government, industry associations and employers in the sector to better understand the skills demanded by the sub-sectors and establish the in-house training strategies that would assist graduates in gaining first-hand experience.
- o The development of a Coaching Framework in partnership with SASCOC, to address the issue of RPL of coaches has been concluded. Thus, ensuring that coaches with the relevant experience and skills, but lacking formal qualifications, are provided with an opportunity to gain recognition in the form of a formal qualification.
- o An increased number of learners enrolled in higher qualifications including post-graduate students at Masters and PhD levels have been seen through the partnerships that CATHSSETA has established with various HEIs.
- o Further partnership efforts include partnerships for career guidance events, and partnerships with TVET colleges, employers and HEIs to provide skills development support to learners.

Transformation in the sector:

Amongst one of the most consistent findings is the need for transformation in the sector at higher occupational levels. This is in terms of both promotion of female employees as well as support of black skills development. In order to change the demographic profile of managers and professional in the sector, continued development of relevant skills are required to improve this pipeline. Whilst there has been marginal gains with regards to transformation, this continues to be a key focus for the overall transformation of the sector. In line with the NSDS III imperatives, consideration of such objectives are key in the allocation of the CATHSSETA Discretionary Grant funding allocations.

5.4. Measures to support National strategies and plans

The impetus to support National strategies and plans is embedded in the CATHSSETA strategy and the six chamber (sub-sector) strategies. These are implemented in the following manner:

- The ACH chamber has formulated the heritage sub-sector forum to find collective ways of addressing issues as identified in the National Policy on South African Living Heritage as well as the National Heritage and Cultural Tourism Strategy.
- Within the Hospitality sub-sector, the review of the chef qualification has been concluded, in line with the National Development Plan vision for 2030 for the chef occupation.
- Considerable investment has been made in support of the National Sport and Recreation Plan and the South African Coaches Framework: for example, in order to lay a firm foundation for widening access to increased participation levels and enhance sporting excellence, capacity has to be stepped up. The following measures have been initiated:

- o Accreditation support – 11 National Federations are in the process of getting their accreditation status as training providers.
- o Education and development of coaches through the training of coach developers who will provide education and support to coaches – training has taken place for 379 facilitators, assessors (including RPL assessors) and moderators. This likewise will enable the implementation of RPL in support of the fast-tracking of the conferring of coaches' skills programmes and qualifications across all sporting codes within South Africa.

- CATHSSETA has prioritised a number of interventions to support the National Protected Area Expansion Strategy (2008). Part of the interventions that will be implemented includes bursaries, learnerships and skill programmes as programmes that will assist in training on scarce and critical skills.

5.5. Conclusion

The CATHSSETA sector with its varying sub-sectors has been deemed to be a crucial driver of the South African economy. As such, investment in human capital development (HCD) knowledge and skills have great economic value. The impact of education and training on company performance and the economic sector as a whole is an important issue because of the large amount invested. Whilst CATHSSETA has been in operation for over 10 years, it is only in the last three years that some significant strides have been recorded. There has been no impact studies done as yet to establish the extent of progress achieved. At this stage it can be noted that one single achievement is getting employers in the sector involved in real training other than in-house non accredited training. A large number of sector employers are beginning to realize that the effects of education and skills on productivity and innovations are generally positive and significant.

BIBLIOGRAPHY

DEA (Department of Environmental Affairs). (2011). Environment Impact Assessment and Management Strategy. Available from *www.environment.gov.za.*

DHET (Department of Higher Education and Training). (2010). Government Gazette 11 November 2010 No. 33756.

DHET (Department of Higher Education and Training). (2011). National Skills Development Strategy III (Brochure). Pretoria: Department of Higher Education and Training.

GCIS (Government Communication and Information System). (2014). South African Yearbook 2014-15. Pretoria: Government Communication and Information System.

Montmasson-Clair G. (2012). Green Economy Policy Framework and Employment Opportunity: A South African Case Study. (Report). Pretoria: Trade and Industrial Policy Strategies (TIPS).

NDT (National Department of Tourism). (2011). National Tourism Sector Strategy. (Brochure). Pretoria: National Department of Tourism.

NGB (National Gambling Board). (2015). Annual Report 2014. Centurion: National Gambling Board.

PWC (PricewaterhouseCoopers). (2014). Gambling Outlook 2014-2018, 3rd Annual Edition. (Report) Johannesburg: PricewaterhouseCoopers.

PWC (PricewaterhouseCoopers). (2014). Entertainment and Media Outlook 2014 – 2018. 5th Annual Edition. Johannesburg: PricewaterhouseCoopers.

PWC (PricewaterhouseCoopers). (2015). Entertainment and Media Outlook 2015 – 2019. 6th Annual Edition. Johannesburg: PricewaterhouseCoopers.

PWC (PricewaterhouseCoopers). (2015). The African Traveller 2015 – 2019. 5th Annual Report. Johannesburg: PricewaterhouseCoopers.

SAT (South African Tourism). (2015). Annual Tourism Report. (Brochure). Johannesburg: South African Tourism- Strategic Research Unit.

STATS SA (Statistics South Africa). (2016). Tourism Satellite Account for South Africa.

The DTI (Department of Trade and Industry). (2013). Industrial Policy Action Plan 2013/14-2015-16. Pretoria: Department of Trade and Industry.

The DTI (Department of Trade and Industry). (2014). Industrial Policy Action Plan 2014/15-2016-17. Pretoria: Department of Trade and Industry.

VANSA and DEA (Visual Arts Network of South Africa and Department of Arts and Culture). (2010). An assessment of the visual arts in South Africa. Pretoria: Department of Arts and Culture.

WTTC (World Travel and Tourism Council). (2016). Economic Impact 2016, South Africa (report).

Old Nedbank Building (ground floor)
1 Newton Avenue
Killarney, 2193

Tel: 011 217 0600
Website: www.cathsseta.org.za
E-mail: info@cathsseta.org.za

GPS Co-ordinates: S 26.16968°, E 28.05314°