

Sector Skills Plan

2019-2020



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**CULTURE, ARTS, TOURISM, HOSPITALITY & SPORT
SECTOR EDUCATION AND TRAINING AUTHORITY**

**SECTOR SKILLS PLAN
2019 - 2020**

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 2019/20 financial year. In April 2018, the Department of Higher Education and Training (DHET) appointed a new Board of Directors to steer the organisation to greater heights. The Board is working with the Acting Chief Executive Officer (ACEO) and her team for the organisation to deliver on its mandate, including the development of an SSP.

In the past year, CATHSSETA completed various research studies, the outputs of which have been incorporated into the final 2019/20 SSP. A consultation session was held at the Africa Travel Indaba in KwaZulu-Natal (KZN) to solicit further input for inclusion in the SSP. Additional expert interviews with key role-players in the sector were also carried out in various provinces across the country. Outcomes of the stakeholder engagements have been incorporated into this SSP.

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

In conclusion, I would like to thank our stakeholders for their valuable participation and contribution to the SSP development process. CATHSSETA will seek to leverage these engagements to further our positive contribution to society.



Victor Ramathesele (Dr)

Chairperson of the Board: CATHSSETA

AUTHORISATION OF THE SECTOR SKILLS PLAN

We, 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 2019/20.

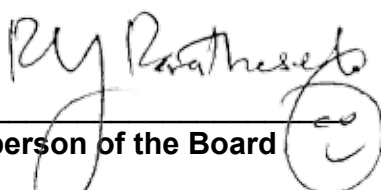
Approved By:



Chief Executive Officer

Keitumetse Lebaka (Ms)

Date: 14 November 2018



Chairperson of the Board

Victor Ramathesele (Dr)

Date: 14 November 2018

Abbreviations and Acronyms

AET	Adult Education and Training
ACH	Arts, Culture and Heritage
CATHSSETA	Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority
CONS	Conservation
CHE	Council of Higher Education
DAC	Department of Arts and Culture
DEA	Department of Environmental Affairs
DEAT	Department of Environmental Affairs and Tourism
DG	Discretionary Grant
DHET	Department of Higher Education and Training
FIR	Fourth Industrial Revolution
GDP	Gross Domestic Product
GGR	Gross Gambling Revenue
G&L	Gaming and Lotteries
HTFV	Hard-to-fill-vacancies
HEI	Higher Education Institution
HEMIS	Higher Education Management Information System
HOSP	Hospitality
HRD	Human Resource Development
ICT	Information and Communication Technology
KZN	KwaZulu-Natal
MTSF	Medium Term Strategic Framework
MOU	Memorandum of Understanding
NCV	National Certificate Vocational
NDP	National Development Plan
NDT	National Department of Tourism
NGB	National Gambling Board
NGO	Non-Governmental Organisation
NHEIPE	National Higher Education Institute for Physical Education
NPO	Non-Profit Organisation
NQF	National Qualifications Framework
NSDS	National Skills Development Strategy
NSRP	National Sport and Recreation Plan
NTSS	National Tourism Sector Strategy
OFO	Organising Framework for Occupations
PIVOTAL	Professional, Vocational, Occupational, Technical and Academic Learning
QCTO	Quality Council for Trades and Occupations
QMR	Quarterly Monitoring Report
RPL	Recognition of Prior Learning
SACPO	South African College Principals Organisation
SALGA	South African Local Government Association

SAMSA	South African Maritime Safety Authority
SANBI	South African National Biodiversity Institute
SANParks	South African National Parks
SARS	South African Revenue Services
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
SEs	Small Enterprises
SMS	SETA Management System
SRF	Sport, Recreation and Fitness
SRSA	Sports and Recreation South Africa
SSP	Sector Skills Plan
TBC	To Be Confirmed
THRD	Tourism Human Resource Development Strategy
T&T	Travel and Tourism
TVET	Technical and Vocational Education and Training
UoT	University of Technology
WIL	Work Integrated Learning
WRP	Work Readiness Programme
WTTC	World Travel and Tourism Council

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EXECUTIVE SUMMARY

The Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) has compiled the annual update of the Sector Skills Plan (SSP) for the period 2019/20. This SSP has been prepared in accordance with section 10 (1) (a) of the Skills Development Act of 1998 which mandates the SETA to develop an SSP within the framework and guidelines included in the National Skills Development Strategy (NSDS) III for the period 2011 to 2016 (recently extended to 2020), as well as the requirements set out by the Department of Higher Education and Training (DHET) SSP Framework. The key policy drivers that have been identified and considered in this SSP are the National Development Plan, 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 Human Resources Development Strategy (THRD), the Lotteries Act 32 of 2013, and the Department of Environmental Affairs (DEA) Strategy.

Overall, CATHSSETA is organised into six sub-sectors which include Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness; and Travel and Tourism, representing an extremely vast and varied sector in terms of nature, scope and size. The geographical profile of the sector indicates a greater concentration of employers and employees in the Gauteng, Western Cape and KwaZulu-Natal provinces. Racial and gender disparities remain in the demographic composition of the overall sector; indicating that there is need for further transformation in the sector. The majority of employees in the sector are classified as youth (less than 35); indicating that the SETA needs to prioritise and support the development of youth in the various sub-sectors.

Various change drivers have an impact on the supply and demand of skills as well as skills development in the sector. Change drivers represent a range of external factors identified as key issues that impact development in the sector. CATHSSETA takes into consideration these drivers of change and their inevitable implications on skills development on the sector by directing relevant programmes and learning interventions to support and/or mitigate the effects of the identified change drivers on the sector. The change drivers identified include, technological advancements – highlighting the Fourth Industrial Revolution (FIR); globalisation; legislative considerations; the ageing generation; climate change and green economy; political and economic uncertainty; and the changing nature of the sector.

The analysis of the demand and supply of skills within the sector has been assessed utilising the Mandatory Grant application data and inputs from in-depth interviews and focus group sessions with relevant stakeholders in the sector. The analysis and interpretation of these consolidated inputs are augmented by research conducted by CATHSSETA and its partners. The data analysis was conducted in the following manner (a) data was checked, 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) historical data, derived from the analysis of previous periods' Reported and Planned Training Interventions data was used; (f) analysed data was presented as tables, graphs and summary statistics and (g) trend analysis, based on historical data combined with consultation inputs for comparison across different categories and over various time periods, was conducted.

The recognition of priority skills is based on the occupations identified as occupational shortages. The identified occupational shortages 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 occupational shortages. Demand estimates were calculated through time-series forecasts, using the time-ordered sequence of historical observations on a variable to develop a model for predicting future values of that variable.

The sub-sectors within CATHSSETA are forecast to experience continued strong growth in the years to come. To support the industry's success, and facilitate this projected growth, industry partners must work together to ensure access to suitably skilled labour. In response to this, this SSP will contribute to the following development priorities in the sector:

- Technological advancement
- Qualification review
- Training provision
- Analysis of skills needs
- Workplace-based learning and experiential learning
- Mentoring and Coaching
- TVET capacity building
- Increased need for partnerships
- Transformation in the sector

In order to address the above development priorities to facilitate industry support, CATHSSETA has formed strategic partnerships with employers, Higher Education Institutions (HEIs), Technical and Vocational Education and Training (TVET) Colleges, research partners and other public entities. Partnerships that have yielded fruitful results include: the Ezemvelo KZN Wildlife partnership whereby 623 employees were trained on customer care; and qualification reviews of five qualifications in the Food Beverage Services, Fast Food, Gaming Operations and Nature Conservation. A continuous challenge faced by the SETA, however is promoting research at post-graduate level in the prescribed research programmes. Partnerships for development and review of qualifications have also posed a challenge; on account of the voluntary nature of participation by stakeholders during the review process.

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, and labour market profile. Chapter 2 identifies change drivers in the sector and their implications for skills. Chapter 3 considers the demand and supply of skills and concludes with the identification of occupational shortages and skills gaps in the sector. Chapter 4 provides an outline of the partnerships that CATHSSETA currently has in place and the new partnerships needed. Finally, Chapter 5 summarises the key findings from the previous chapters and identifies and discusses the development priorities.

RESEARCH PROCESS AND METHODS

This section details the research process and methods CATHSSETA has utilised, the findings inform the update of the Sector Skills Plan (SSP). The research process entailed conducting primary and secondary research to collect data. The research methodology employed for this SSP included both qualitative and quantitative research methods. Secondary desktop research was conducted on economic, social and development status of the sector, as well as data and publications from the Higher Education Management Information System (HEMIS) and industry regulators and entities such as the National Gambling Board (NGB) and South African Tourism (SAT). Primary sources of data included Mandatory Grant application data (which was previously the Workplace Skills Plan and Annual Training Report), as well as internal and external stakeholder consultative sessions to elicit further input into the SSP, so as to triangulate data. In the current year, the SETA is currently conducting research on the studies detailed in the table below.

Table 1: CATHSSETA Research Studies

Type of Study	Topic	Nature (design) of the study	Objectives of study	Data collection tool	Sample size and scope of the study	List of data sources	Time Frame of study
Track and Trace	Track and trace beneficiaries of learning programmes	Qualitative and quantitative methods	To develop a database of learners who have successfully completed learning programmes during the 2014/15 to 2015/16 period so as to provide employers with a pool of skilled potential employees	Quantitative: Survey Qualitative: Interviews	Scope: Learners who have completed learning programmes during the 2014/15 to 2015/16 period.	Quarterly Monitoring Report (QMR) for the 2014/15 to 2015/16 period. Mandatory Grant Data	May 2017 – September 2018
Occupational Shortages Report	Number of employed and unemployed learners trained in occupations in high demand	Quantitative study	Determine and track the number of employed and unemployed learners trained in occupations in high demand and PIVOTAL programmes	Quantitative: Survey	Learners entered into training interventions during the 2017/18 period	Quarterly Monitoring Report (QMR) for Q1–Q4 2017/18 period	March 2017 – March 2018
Training Analysis Report	Number of planned training achieved	Quantitative study	Provide an analysis of training achieved by the sector through a comparison of training planned in the previous reporting	Quantitative: Survey	Mandatory Grant application data – planned training 2015/16 versus 2016/17 achieved training	Mandatory Grant Data for period 2016/17 planned training and 2016/17 achieved training	March 2017 – June 2017
Feasibility Study	Feasibility study on Work Readiness Programme (WRP)	Qualitative and quantitative methods	To establish whether there is a need for a WRP based on the number of learners not completing Work Integrated Learning programmes	Quantitative: Survey Qualitative: Interviews	100 levy and non-levy paying employers 670 learners 6 Regional Managers 79 HEI/TVET colleges	Mandatory Grant Data Quarterly Monitoring Report (QMR) for the 2014/15 to 2016/17 period	December 2017 – August 2018

Currently, there is no single database for CATHSSETA which provides a comprehensive profile of the sector as per the 62 Standard Industrial Classification (SIC) codes in the SETA's scope. A range of data sources have therefore been used in developing this SSP. These sources are as follows:

1. The SETA Management System (SMS) is an electronic data management tool used for processing Mandatory Grants, certification, and registration of qualifications, learners and skills development facilitators. The SMS also serves as a data storage and reporting facility.
2. Mandatory Grant applications provide data on sector employment, as well as the demographic and occupational profiles of employees per sub-sector. The total Mandatory Grant applications submitted in the 2018 period amounted to 1 148. A recognised limitation of the sector is the lack of data on employers and employees, and efforts to address this limitation are currently underway as surveys to collect further data are conducted. Data for the Mandatory Grant was collected based on the Organising Framework for Occupations (OFO) version 2017.
3. National data sources include the Higher Education Management Information System (HEMIS) maintained by DHET, publications and reports by the World Travel and Tourism Council (WTTC), the National Gambling Board (NGB) and South African Tourism (SAT), as well as research conducted by other government departments, national research institutions and industry publications.
4. CATHSSETA, together with relevant National and Provincial Government Departments in the sector, conducts research to ensure that there is sufficient data to conduct an accurate labour market and skills needs analysis of the sector. These projects include giving research grants to universities for research into better understanding the size, employment and economic contributions of the six sub-sectors.
5. Findings from consultation with key sector stakeholders representing the Tourism, Hospitality and the rest of the sub-sectors have been incorporated in this update of the SSP. Internal stakeholders (Regional Managers, relevant governance structures) also provided input into this SSP.



CHAPTER 1

SECTOR PROFILE

1. 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. To highlight the economic and employment contribution of the sector, this chapter outlines the scope and economic performance of the sector. The chapter is organised into five main sub-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 as defined by the South African Revenue Services (SARS). The SETA landscape for NSDS III is described in the Government Gazette of November 2010 which placed 62 SIC codes in CATHSSETA's scope. CATHSSETA has clustered the SIC codes in its scope into six sub-sectors, namely the Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness; and Tourism and Travel Services. All of these sub-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 and Lotteries and Hospitality sub-sectors. Seasonality and job instability, combined with low-pay, long working hours and a 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 encompasses the production of arts, crafts, designer goods and souvenirs, casting for film, television and theatre, the dramatic arts, entertainment, museum activities, monuments and the preservation of historical sites and buildings, the 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 and trapping, the activities of conservation bodies, game parks, reserves, wildlife 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, the 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, the management and operation of game lodges, caravan parks and 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 **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, the 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 and others.

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, the operation and management of recreation parks, beaches, fairs, shows and facilities, and the operation and management of health and wellbeing centres, including hydros, spas and fitness centres.

1.3. Key Role-Players

The sub-sectors within CATHSSETA's scope are represented by diverse organisations and members of the workforce. The table below outlines some of the key role-players and relevant example organisations within the respective sectors. The organisations listed in the table below are not exhaustive of the entire sector.

Table 2: Key Role Players

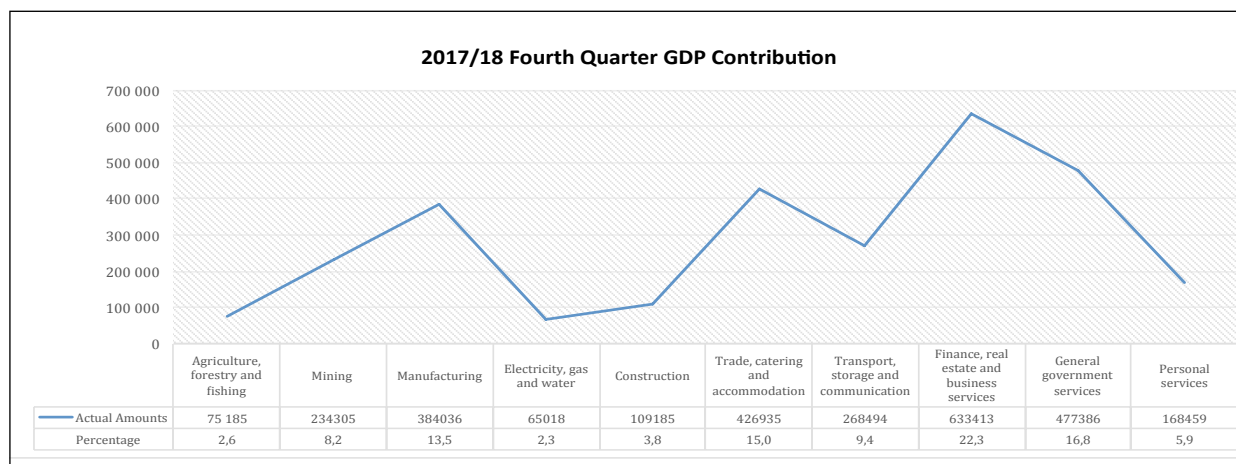
Role in Sector	Key Role-Players
Government	
Contribution to skills development levies Support sector partnerships Represent the interests of the state Support skills development through various learning interventions	<ul style="list-style-type: none"> • Department of Higher Education and Training (DHET) • Department of Environmental Affairs (DEA) • National Department of Tourism (NDT) • The Department of Trade and Industry (the dti) • Sport and Recreation South Africa (SRSA) • Department of Arts and Culture (DAC) • Museums and Heritage sites
Employers	
Contribution to skills development levies Represent the interests of Small, Medium, Large entities Submit Mandatory Grant application data Support sector partnerships Support workplace-based learning through various learning interventions	<ul style="list-style-type: none"> • Restaurants and Food establishments • Hotels and Game lodges • Casinos and Lotteries • Meetings, Incentives, Conferences and Exhibitions (MICE industry) • Travel and Airlines • Bookmakers, Totalisators, Bingo Operators • Crafters • Artists and Entertainers • Creative professionals • Cultural and heritage practitioners • Health and Fitness establishments
Associations And Federations	
Self-regulatory bodies representing the skills development aspirations of their members	<ul style="list-style-type: none"> • Federated Hospitality Association of Southern Africa (FEDHASA) • Traditional Horse Racing and Traditional Horse Riding Association • South African Football Association (SAFA) • South African Sports Confederation and Olympic Committee (SASCOC) • South African Pole Sports Federation (SAPSF)
Training Providers	
Provide skills development support through education and training Assessment of learners Moderation and certification of learners Capacitation of TVET colleges Contribute to qualification review and development	<ul style="list-style-type: none"> • TVET colleges • Higher Education Institutions (HEIs) • Accredited Training Providers • Learning Academies
Labour Unions	
Provide skills development support through education and training Assessment of learners Moderation and certification of learners Capacitation of TVET colleges Contribute to qualification review and development	<ul style="list-style-type: none"> • TVET colleges • Higher Education Institutions (HEIs) • Accredited Training Providers • Learning Academies

Other	
Represent interests of various industry bodies, learners and the public Contribute to education, training, accreditation, certification and consumer/stakeholder rights	<ul style="list-style-type: none"> • National Gambling Board • Sports and Recreation Clubs • Gaming Regulators • Visual Arts Network of South Africa (VANSA) • Conservation Action Trust • National Skills Authority (NSA) • South African Qualifications Authority (SAQA) • Quality Control of Trades and Occupations (QCTO) • Council of Higher Education (CHE) • uMalusi • Learners
Community	
Facilitate skills development through strategic partnership projects Contribute to education and training of Small Enterprises (SEs), NGOs/NPOs/Cooperatives development, and the advancement of women and youth	<ul style="list-style-type: none"> • Non-Governmental Organisations (NGOs) • Non-Profit Organisations (NPOs) • Cooperatives • Small Enterprises (SEs)

1.4. Economic Performance

Despite the political and economic instability, South Africa reported higher than expected economic growth in 2017. Overall, the country's Gross Domestic Product (GDP) grew by 1.3% in 2017, exceeding National Treasury's prediction of 1.0% growth. The strengthening in economic activity in 2017 can partly be attributed to the agricultural industry, which bounced back from one of the worst recorded droughts in history (StatsSA, 2018). Maize crop and recovery in agricultural commodities saw agricultural production rise by 17.7%. The finance and mining industries also contributed positively to GDP growth in 2017; growth in mining was spurred on, in part, by increased production of manganese ore, chrome and iron ore. Rising demand for minerals used in the production of steel also contributed to the increase. The graph below outlines the StatsSA (2018) Fourth Quarter GDP report. Trade, catering and accommodation contributed 8.2% to total GDP in the fourth quarter of 2017/18, while agriculture contributed 2.6% and mining 15%. While economic activity continues to firm in the country, the economic performance of the sector as a whole is difficult to assess due to the lack of a single comprehensive sector database encompassing the six CATHSSETA sub-sectors.

Figure 1: Industry value added and gdp 2017 in % and rands



The Travel and Tourism sub-sector directly contributed 2.9% to the South African GDP in 2016, making it one of the fastest growing sectors in the country (StatsSA, 2018). The World Travel and Tourism Council (WTTC) estimates that the Travel and Tourism sector contributed R402 billion in 2016 (9.3% of GDP) and R412.2 billion in 2017 (9.4% of GDP). This is largely owing to leisure travel spending (inbound and domestic), and business travel spending accounting for the largest proportion of travel and tourism GDP in the country (WTTC, 2017).

The Travel and Tourism sub-sector shares strong linkages to Hospitality, thus growth in the sub-sector is likely to boost the economic contribution and development of the Hospitality sub-sector as well. However, current statistics on the Hospitality sub-sector mostly focuses on the accommodation segment. Growth in Travel and Tourism is expected to boost growth in the accommodation industry across the African continent during the next five years. Total income for the Tourism accommodation industry increased by 3.6% in 2017 compared to 2016. In 2017, the main contributors to the year on year increase in income from accommodation included hotels and 'other' accommodation (excluding hotels, caravan parks, camping sites and guest houses) (StatsSA, 2017).

According to South African Maritime Safety Authority (SAMSA) (2015), marine tourism ranks in the top four sub-sectors of South Africa's maritime economy, with enormous growth projected for the next two decades. Marine and Coastal Tourism is at the forefront of the NDT's strategy to boost domestic and international tourism in South Africa, while contributing to job creation and the economy. The SA maritime economy contributed R19 billion to the country's GDP in 2013, with projections currently indicating that this is likely to rise to around R44 billion in 2020, and grow to as much as R134 billion by 2033. The economic potential should be fostered and encouraged by government and private sector (SAMSA, 2015).

Assessment of the Conservation sub-sector indicates that there is a lack of recent official statistics. The sub-sector contributed R20 billion to South Africa's GDP in 2015 (Dry, 2015). In 2016, the wildlife economy contributed approximately 3% to the national GDP, growing annually by an average of 9.3% from 2008 to 2014 (SA Hunters, 2017). The total revenue generated by live sales on all wildlife ranches across South Africa was estimated to be R4.3 billion - this value included private sales which equated to R2.4 billion; and trophy hunters generated R1.96 billion (SA Hunters, 2017). No estimates have been made for eco-tourism wildlife ranching which is a thriving industry in South Africa and potentially contributes significantly to economic and social development in the country. The green economy is also recognised to be on a growth path across a variety of industries in South Africa.

Total GDP contribution of the Creative Culture Industry was reported at R63.4 million in 2016, accounting approximately 1.7% to South Africa's total Gross Value Added (GVA). Cultural and Natural Heritage sites generated approximately R5 billion in 2016, 38% of which is reportedly generated indirectly according to the South African Cultural Observatory (2017).

The Gross Gambling Revenue (GGR) increased by 9.6% from R21.8 billion in 2014 to R26 billion in 2016, and R27 billion in 2017 (National Gambling Statistics, 2017). Relative to other gambling modes, casinos accounted for the highest proportion of GGR (66.4%) in 2017. Overall, the gambling sub-sector contributes significantly towards the country's economy through tax revenues collected and job creation (National Gambling Statistics, 2017).

Interest in sport for development has increased in the past decade as organisations recognise its social, health and economic values (Barry & Marshall, 2015). For instance, the Cape Town Cycle Tour event injects R500 million into the Western Cape economy every year, while raising millions

1.5. Employer Profile

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

Table 3: 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+		
Hospitality	19 635	769	397	20 801	68%
Travel and Tourism	2 880	87	85	3 052	10%
Arts, Culture and Heritage	2 262	67	60	2 389	8%
Sport, Recreation and Fitness	2 302	80	58	2 440	8%
Conservation	1 564	35	32	1 631	5%
Gaming and Lotteries	314	55	70	439	1%
Total	28 957	1093	702	30 752	100%

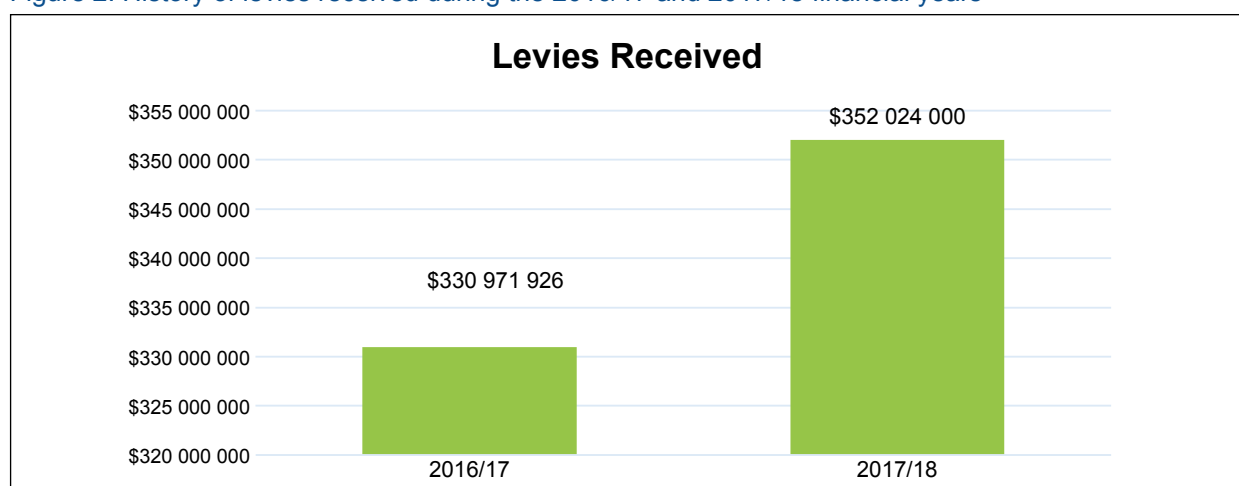
Source: Stats SA, 2018

The Hospitality sub-sector comprises 68% of the entities in the sector, making it the largest sub-sector. This is followed by Travel and Tourism sub-sector (10%), with the Arts, Culture and Heritage, and Sport, Recreation and Fitness sub-sectors respectively accounting for 8% of the sector.

Overall, the sector is dominated by Small Enterprises (SEs), accounting for a very large proportion of 94% entities in the sector. These SEs are predominantly exempt from the payment of the Skills Development Levy (SDL). Taking into account the large size of the overall sector, combined with the fact that SEs make up 94% of it, the allocation of resources becomes a challenging task.

In order to examine the levy income from organisations within the sector, Figure 2 compares the total levies received from the 2016/17 financial year to that of the 2017/18 period. The total levies received from employers have increased by 6% from R330 million in 2016/17 to R352 million in 2017/18.

Figure 2: History of levies received during the 2016/17 and 2017/18 financial years

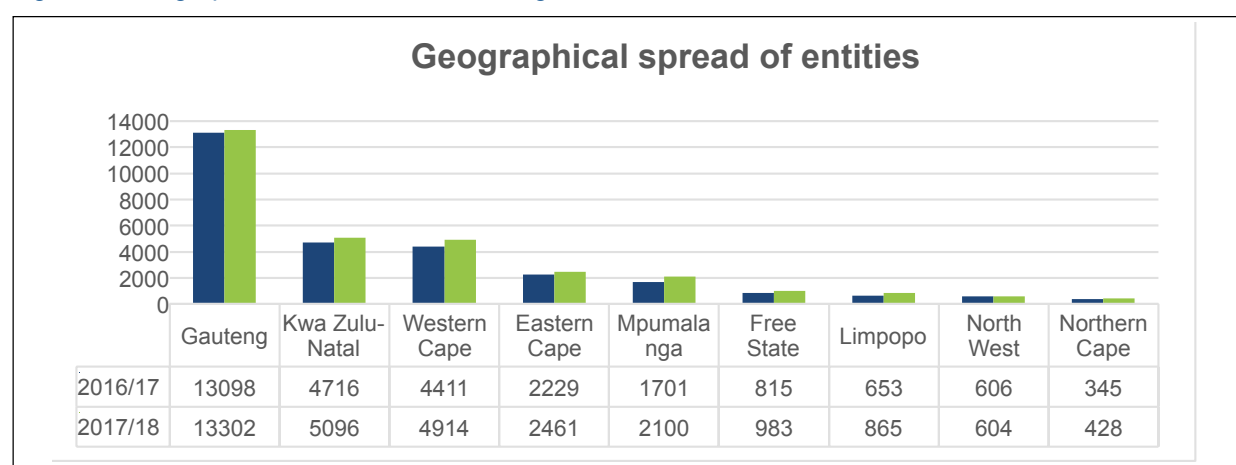


Source: CATHSSETA Annual Financial Statements

The total number of levy payers increased by 7% from 6 717 in 2016/17 to 7 246 in 2017/18. Out of the total 30 752 entities registered within the sector, only 24% contribute to skills levies. Almost 50% of the levy income received, as regulated, is directed to Professional, Vocational, Technical and Academic Learning (PIVOTAL) training interventions in the sector.

The geographical spread of the entities in the sector is illustrated in Figure 3 below. The distribution of entities follows a similar pattern as in previous years with the majority (43%) of entities located in the Gauteng province followed by Kwa Zulu-Natal and the Western Cape respectively accounting for 16%.

Figure 3: Geographical location of entities registered with cathssseta

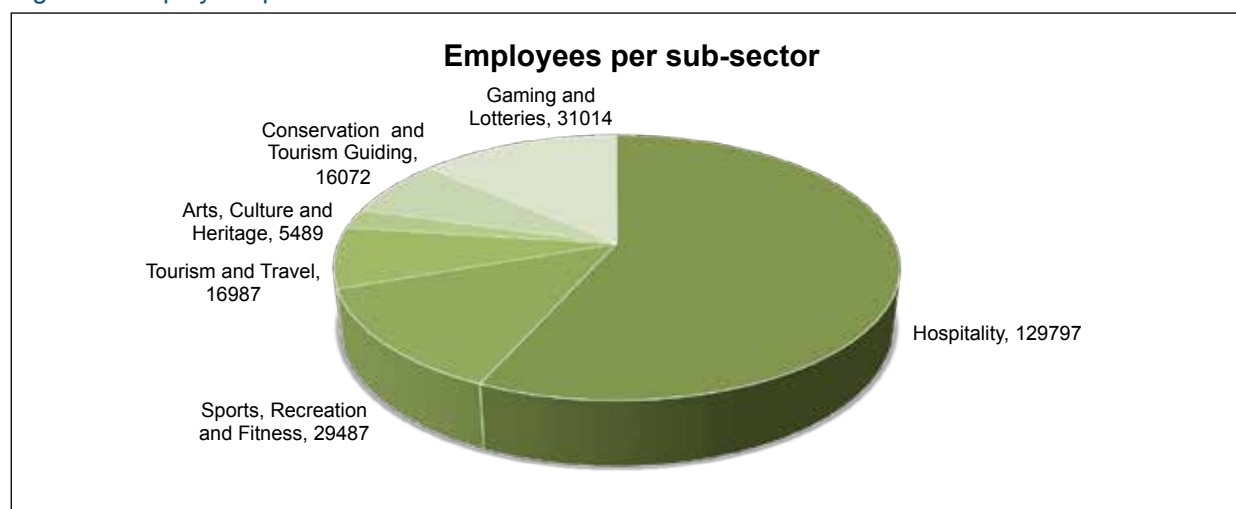


Source: CATHSSETA SMS 2018

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

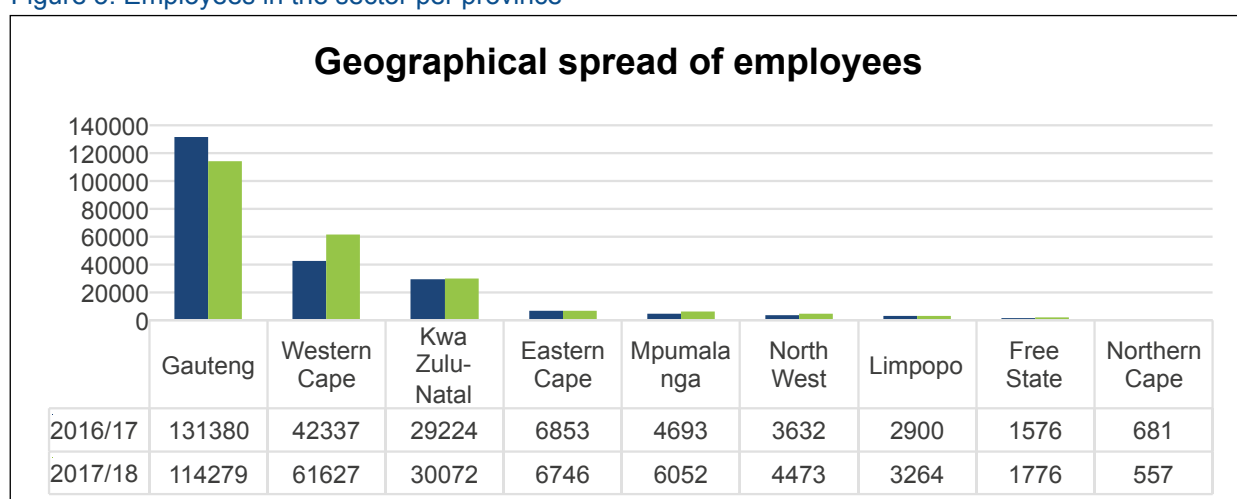


Source: CATHSSETA SMS 2018

Based on the figure above, the sector employs a total of 228 846 employees. The following is evident per sub-sector:

- Arts, Culture and Heritage: Currently the sub-sector employs 5 489 employees up from 4 668 in 2017. The 2% increase has been constant in the past two years.
- Conservation: The number of employees increased from 12 835 in 2017 to 16 072 in 2018, constituting 7% of the total employees in the sector.
- Gaming and Lotteries: This sub-sector has increased by 10% from 30 702 in 2017 to 31 014 in 2018. The sub-sector remains the second largest sector in terms of the number of employees.
- Hospitality: The Hospitality sub-sector remains the largest employer in the sector, with a total of 129 797 employees reported. The number of employees has decreased by 10% from the previous year, with the sub-sector now representing 56% of total employment in the sector.
- Sports, Recreation and Fitness: The sector has shown a 49% increase, from 14 644 in 2017 to 29 487 in 2018, making up 13% of total employment in the sector.
- Travel and Tourism: The number of employees reported increased in 2018 from 16 670 employees to 16 987. The sub-sector still represents 7% of employees in the sector, making it the third largest sub-sector.

Figure 5: Employees in the sector per province



Source: CATHSSETA SMS 2018

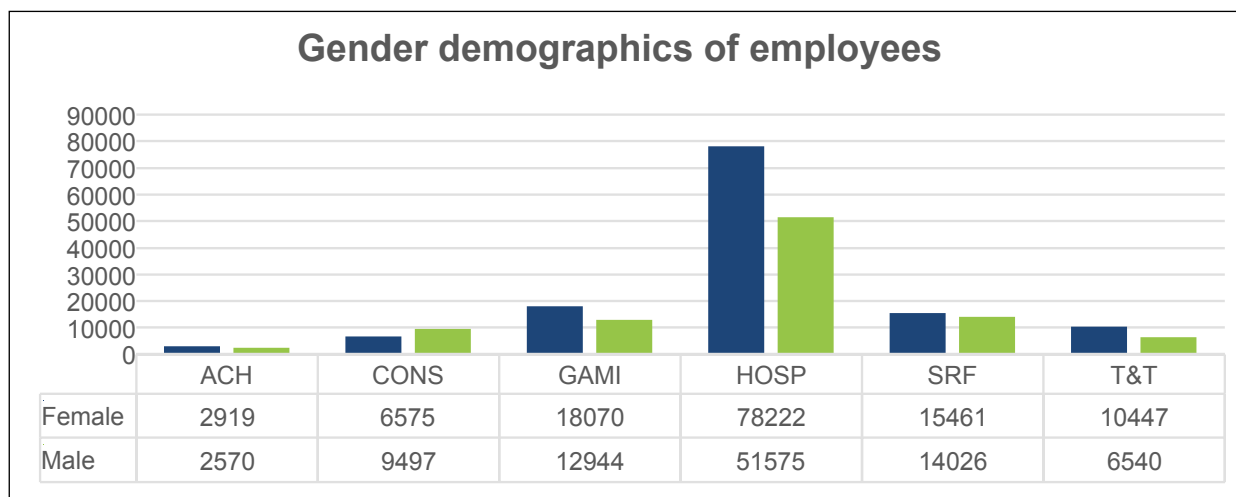
The geographical spread of employees in the sector is shown in Figure 5 above. The largest number of employees is situated in the Gauteng, Western Cape and KwaZulu-Natal provinces, which is in line with the distribution of entities. This geographical spread is justifiable based on the cities of Johannesburg, Cape Town and Durban being voted the top three cities to visit

in South Africa (South African Tourism, 2016). Furthermore, Johannesburg has emerged as the most popular destination city in Africa in 2016, followed by Cape Town, according to the annual Mastercard Global Destination Cities Index. South African Tourism (2016) ranks the Elephant Coast, Cape Winelands, Drakensberg, Battlefields and Garden Route as the most popular attractions. These attractions are located within the KwaZulu-Natal and Western Cape provinces, while Soweto in Gauteng is also ranked as a popular destination.

The gender and race demographics are provided in Figures 6 and 7 respectively. An analysis of employees based on these demographics per sub-sector indicates the following:

- Arts, Culture and Heritage: Female employees represent 53% of the sub-sector, showing a decrease of 2% in 2017. The number of employees in this sector from all races has increased in the current year.
- Conservation: Currently this sub-sector still employs more males than females, with males representing 59% of total employees. This could possibly be attributed to the nature of the jobs (hunting, trapping, park rangers, etc.). Black African employees make up 78% of the sub-sector.
- Gaming and Lotteries: This sub-sector is dominated by Black African employees (79%) with Coloured and Indian accounting for the least number of employees. Females represent 58% of total employment in the sub-sector.
- Hospitality: The number of employees is skewed towards females who represent 62% of the sub-sector. The racial distribution is similar to that of the Conservation sub-sector in which Black African employees make up the majority (78%) and the Indian population group is least represented.
- Sports, Recreation and Fitness: This sub-sector was previously dominated by male employees (60%), the 2018 data shows that females constitute 52%.
- Travel and Tourism: Female employees make up a majority of this sub-sector at 61%. With Black Africans accounting for over 65% of employees in the sub-sector.

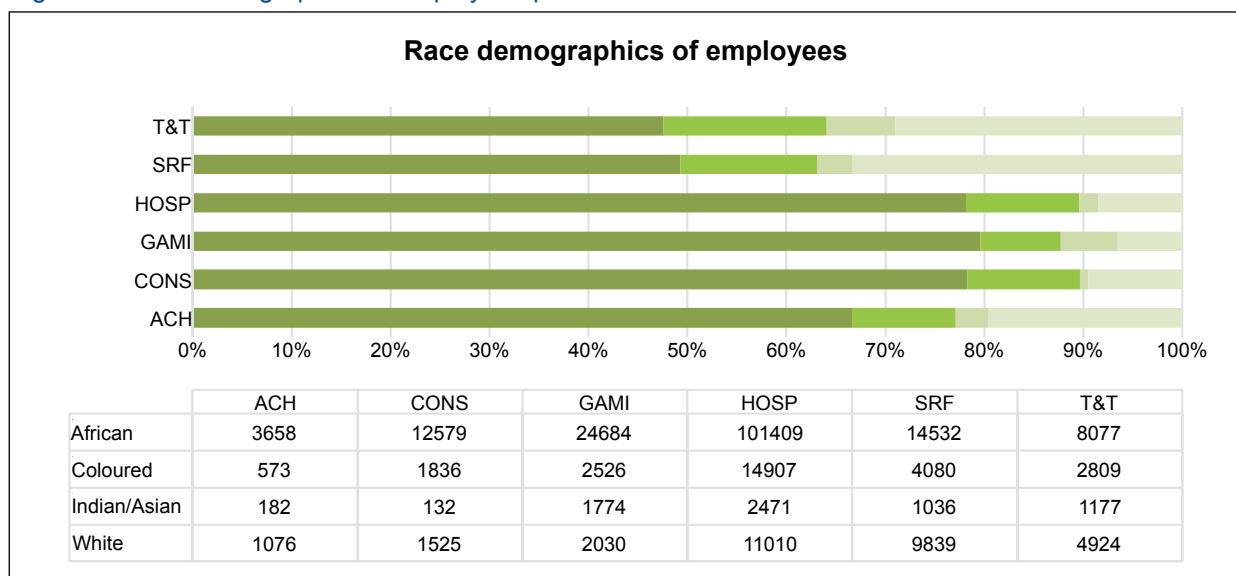
Figure 6: Gender demographics of employees per sub-sector



Source: CATHSSETA SMS 2018

The race demographics of the sector are presented per sub-sector in Figure 7 below. Similarly to previous years, the majority of employees fall within the Black African race at 72%, followed by White 13%, Coloured population group at 12%, and finally the Indian population group at 3%.

Figure 7: Race demographics of employees per sub-sector



Source: CATHSSETA SMS 2018

The age demographics illustrated in the table below show that the majority of employees in the sector (56%) are classified as youth (less than 35 years); followed by employees above 55 years. With the exception of employees above 55 years, the majority of employees less than 35 years (47 076) and between 35 and 55 years (21 405) are employed as service and sales workers; while the majority of employees above 55 years are employed in elementary

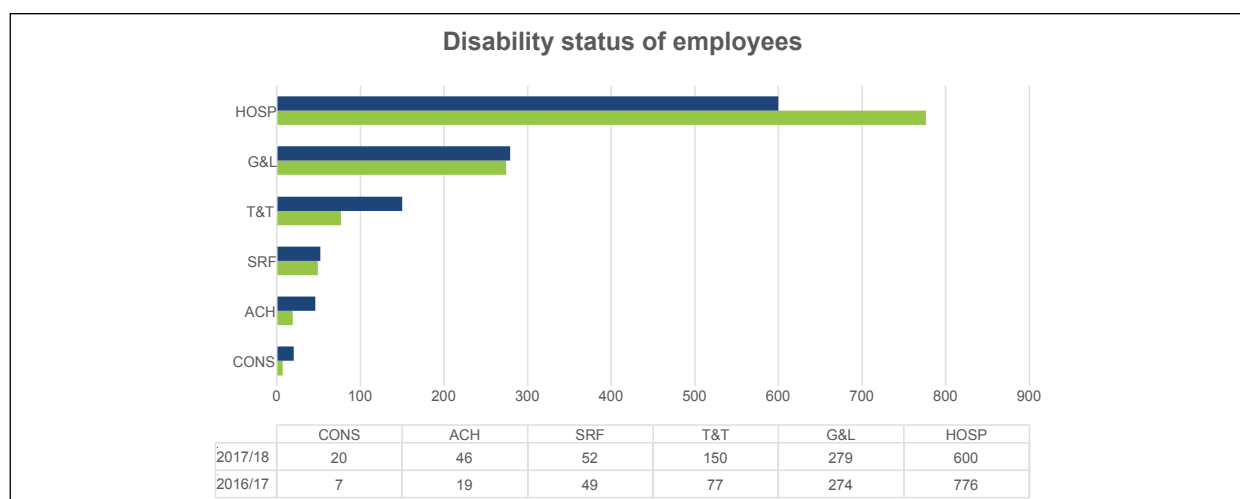
occupations. Out of the 27 436 employees that occupy management positions, 53% of them are between the ages 35 and 55.

Table 4: Age Demographics

Age Demographics			
OFO Major Group	Less than 35 years	Between 35 to 55 years	Above 55 years
Managers	11 395	14 541	1 500
Professionals	4 274	4 271	464
Technicians and Associate Professionals	16 659	14 059	2 019
Clerical Support Workers	23 556	11 717	1 016
Service and Sales Workers	47 076	21 405	1 722
Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers	1 113	1 884	426
Plant And Machine Operators and Assemblers	2 511	2 132	487
Elementary Occupations	22 595	19 512	2 512
Grand Total	129 179	89 521	10 146

The figure below outlines the disability status of employees in the sector. Out of the 228 846 employees in the sector, people with disabilities only comprise 1 147, representing less than 1% of total employment in the sector; falling short of the 2% target that government has set to achieve. The Hospitality sub-sector still employs the largest percentage of people with disabilities, however with a decrease to 600 in 2018 from 776 in 2017. This is followed by employees with disabilities in the Gaming and Lotteries sub-sector (279), up from 274 in 2017 and the Travel and Tourism sub-sector increased to 150 from 77 employees. The SRF sub-sector reported an increase from seven in the previous year to 52 in the current year. The conservation sector has the least number of employees with disabilities.

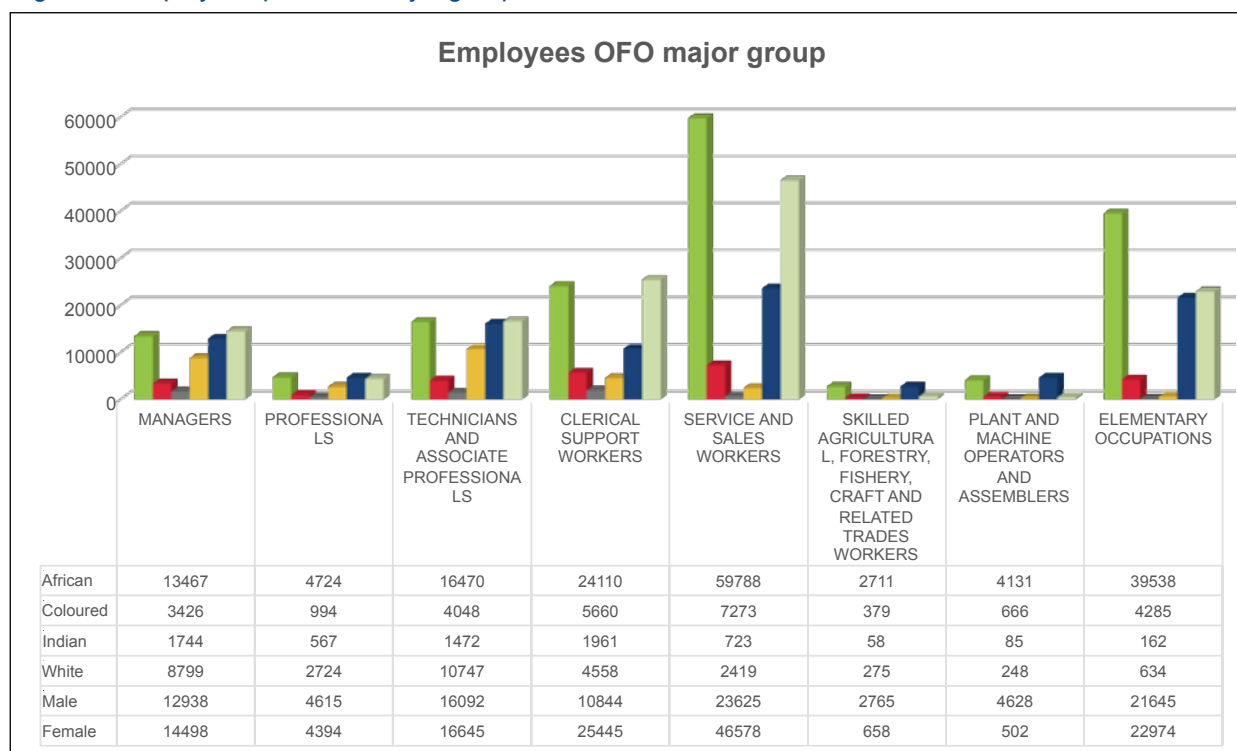
Figure 8: Disability status of employees within the sector



Source: CATHSSETA SMS 2018

The figure below illustrates that Black African employees occupy the majority of Service and Sale Workers positions as well as Elementary and Clerical Support Workers as per the OFO major group. Based on the current data, the number of female employees occupying positions of Manager has increased from 13 844 to 14 498 in 2018. The number of female employees in Service and Sales, Clerical Support Workers and Elementary occupations has also increased significantly in the past year.

Figure 9: Employees per OFO major group



Source: CATHSSETA SMS 2018

1.7. Implications of Findings for Skills Development

The key skills implications based on the sector profile can be summarised as follows - The composition of the sector shows that the vast majority of entities (94%) are small (0-49), indicating that there is a need to support and prioritise SE development in the sector. Racial and gender disparities remain in the demographic composition of the overall sector, illustrating the need for further transformation to address employment equality disparities, especial for Black females in the sector. The majority of employees in the sector (56%) are classified as youth (less than 35); indicating that the SETA needs to prioritise and support the development of youth in the various sub-sectors. Lastly, overall the percentage of employees with disabilities falls short of the 2% target set by government. Out of the six sub-sectors,

Hospitality accounts for 52% of total employees with disabilities, thus there is a need to increase the number of people with disabilities employed across the sub-sectors.

1.8. Conclusion

This chapter has outlined the scope of the sector including a description of the key role-players, an analysis of the economic performance of the sector and the competitive position of the sector. Furthermore, it has analysed the employer and employee profiles, reflecting trends and patterns of employment. The key skills implications drawn from the emerging findings in the chapter have also been highlighted.



CHAPTER 2

KEY SKILLS ISSUES

2. CHAPTER 2: KEY SKILLS ISSUES

2.1. Introduction

This chapter focuses on factors that drive change in the sector. Factors such as globalisation, technological advancements, legislative consideration, the green economy, and the changing nature of the sector 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. The aim of this chapter 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 they have for skills planning. The change drivers and National Strategies and Plans were identified using desktop research and consultation with the sectors' 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.

2.2. Change Drivers

This section looks at technological advancement, globalisation, legislative considerations, and the changing nature of the sector, climate change and the green economy, political and economic uncertainty, and ageing generation as the key change drivers within the sub-sectors and thus influence skills planning. Identification of these factors was elicited from a variety of sources, including desktop research and input from stakeholders.

2.2.1 Technological Advancements

Technology is a key driver of change for businesses within the CATHSSETA sector and the impact of technological advancement is seen within all the six sub-sectors. Technology is transforming sector operations; thus constant reskilling of employees is required to keep abreast with the new technologies that cuts across all sub-sectors. An example of this within the Gaming industry is the increase of online betting which, although illegal, has tended to widen their offerings and attract new types of customers. The proliferation of Electronic Bingo Terminals, or stand-alone mini casinos, is also widening the offerings. Within the Lotteries industry, the impact of technological change is seen in the increasing availability of online platforms - such as mobile phone applications, and website and mobile banking applications through which customers may purchase lottery tickets.

In the Tourism and Hospitality sub-sectors for instance, technological advances have resulted in the use of electronic tourist passes, global IT booking systems, food hygiene control systems for hotels and restaurants, the equipment and systems to improve accessibility for people with disabilities (International Labour Organisation, 2014). Another global phenomenon in the Travel and Tourism industry has been the use of remote access technology for tourist guides to easily access information on key points of interest and the use of remote listening devices that tourist guides use to guide visitors. The Sport, Recreation and Fitness sub-sector has also become more technologically driven, with technological advances in gym equipment, fitness and health mobile applications electronic media and the manner in which sports events are covered. Wearable technology is becoming heavily ingrained into professional sports, allowing adverse metrics to be taken into account and utilised within training and allowing for real-time decisions to be made subsequently. The use of virtual fitness instructors within the Recreation field will likely see a decrease in the use of Fitness Instructors and fitness facilities. The implications of these technological advancements in the Sport, Recreation and Fitness sub-sector is the need for new skills set for traditional occupations. The type and level of skill required is starting to change.

In the Conservation sub-sector, curators and conservation biologists require innovative solutions for information management. As a result, there is a growing demand for cross-cutting trans-disciplinary skills. This calls for tailored professional development programmes and Information and Communication Technology (ICT) strategies and plans 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 at the same time driving the demand for new skills and roles to be generated. In the Arts, Culture and Heritage industry there is a move towards increased use of digital communication in editing and post-production tasks, which will likely impact the human resources required. The impact of music and film streaming, You Tube channels and the emergence of Apps may threaten sustainability of the music industry.

The 'Fourth Industrial Revolution' (FIR) is the fourth major industrial era which has had a major impact on skills development across the globe. FIR is characterised by a range of new technologies that are fusing the physical, digital and biological worlds, affecting all fields, economies and industries (Schwab, 2017). FIR technologies are re-shaping the profiles and skills needed. Some jobs will disappear, others will grow and jobs that do not even exist today will become commonplace. What is certain is that the future workforce will need to align its skillset to keep up with pace of the new technologies. The implications for future

skills planning is that the skills that will be in demand will be for high skills in computing technology, software development, artificial intelligence, robotics, etc. In addition, the soft skills required are changing to include skills such as agility, innovation, creativity, problem solving, etc. Thus, CATHSSETA needs to reflect on future jobs, rethinking roles, skills and the nature of employment as well as considering where skill shortages are likely to arise.

2.2.2. Globalisation

Globalisation 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 services, raising the demand for skills such as customer service. In terms of providing a 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. In addition, language training in the Mandarin, Japanese, Spanish and Russian languages has been recognised as vital to ensuring service excellence when dealing with visitors from some of the country’s source markets.

The music industry, film, television, live events and technical production industries are evolving and changing fast to adapt 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. Globalisation leaves developing countries lagging behind due to global advances in technology and the high turnover rate of skilled professionals due to better prospects in more developed countries. As a result, smaller countries have a hard time trying to recoup their investments in skills. While many artists anecdotal do not have formal qualifications and require Recognition of Prior Learning (RPL), they need to be developed in a more holistic manner encompassing business skills and how to expand their markets to a global level. There is therefore a great need to train in new skills in line with this transformation.

2.2.3. Legislative Considerations

Cabinet approved the institutionalisation of a National Minimum Wage Bill in November 2017. Raising wages to a prescribed minimum level when economic performance is low will surely impact employment negatively, particularly within those groups (ages 15 to 35) which are less experienced. South Africa’s official unemployment rate is very high. While the Bill is expected to improve the living conditions of millions of South Africans and further foster economic growth, service sub-sectors such as the Hospitality and Travel and Tourism remain

uncertain on the effects of the Bill on their sub-sectors. Stakeholder engagements revealed concerns on how companies will implement the national minimum wage increase without losing profits, while taking into consideration their respective staffing needs and costs. The majority of the workers within CATHSSETA sub-sectors are at the lower occupational skills levels. Some segments of the economy are likely to cut jobs when the national minimum wage comes into full force. Thus, there is need to plan for the effects on staffing and costs, and the sector needs to look into skills, especially at management level, on how to facilitate the increase in a strategic and compliant way.

2.2.4. The changing nature of the sector

The nature of the sector is seen particularly in the SRF sub-sector in which there has been an increased recognition of the importance of sport, coupled with the move towards increasing globalisation. The effect of this is evident in the diversification of the types of people participating in sport. For example, in South Africa more women are becoming involved in and participating in sport, and people from lower socio-economic groups are becoming more active and are wanting to live healthier lifestyles. Rising change in those participating in sport means that people or consumers start to demand specialised and specified services in sport, recreation and fitness (consumer-orientated demands).

The recent past has seen a growing trend in the convergence of industries such as Arts, Culture and Heritage, with Tourism leading to heritage and cultural tourism. Other examples include sports tourism, coastal or marine tourism, and creative tourism. The perception that some occupations are hobbies, for example arts and crafts, singing, acting and so on, means that there is little emphasis on actual education and training in these fields. Entrants into the workforce thus often have no qualifications and very limited skills. Within the Gambling sub-sector, horse-racing events are sometimes viewed as fashion events, which perpetuates the lack of awareness of the various careers available within the field. These misconceptions reflect the need to modernise the public perception of such occupations and promote them as critical economic drivers.

2.2.5. Ageing Generation

South Africa currently has an unemployment rate of 27%. Compared to adults, the unemployment rate is highest among the youth (accounting for 52% of total unemployment), irrespective of education level (StatsSA, 2018). Stakeholder engagements revealed that overall, the sector struggles with the retention of younger employees. For instance, in the Hospitality sub-sector currently, entry level positions are often occupied by the youth (age 18

to 35) whilst higher level positions are occupied by older employees. Due to lower income offerings and the nature of the sector, the retention of entry-level staff is low. A similar pattern can be observed in the Conservation sub-sector, where a decline in taxonomic research has been noted over the past few years, as aged Taxonomists retire or younger employees depart for improved prospects leaving their positions unfilled with no succession plan in place. Transitional programmes such as Work Readiness Programmes (WRP) are an effective measure to prepare and sensitise students on managing job expectations and work ethics. One benefit of age diversity is the prospect of mentorship between older, more tenured employees and younger, less experienced ones. Although the age gap between mentor and pupil need not be multi-generational, this is often an excellent way for one generation to pass their knowledge and wisdom on to the next. Each generation brings something unique to the table, with the younger employees being more tech-savvy than older counterparts, which comes in handy with high-tech business mediums. Social media sites like Facebook, Twitter, and LinkedIn, among others have become incredibly useful, even crucial among businesses. Knowledge and proficiency in them is now a necessity. This diversity in skills can be a huge asset to companies, particularly those that cater to multi-generational demographics. There is therefore need for succession planning and mentorship programmes to upskill youth.

An additional way of attracting and retaining students and graduates to organisations is building a candidate pipeline through internships. In most instances, organisations that have both a strong employment brand as well as a relationship with a variety of students on campuses tend to have a success rate of recruiting students and creating awareness on various career prospects within their respective organisations and sub-sectors (Wheeler, 2006).

2.2.6. Climate Change and Green Economy

In recent years, there has been increased efforts to control the effects of climate change by creating environmental awareness and promoting sustainable development through the green economy. The NDP 2030 vision states that by 2030 South Africa will transition to become more environmentally sustainable, climate change resilient, and will become a low carbon economy and just society (NDP, 2012). South Africa is well known for its rich biodiversity and abundant wildlife. However, climate change poses a risk to these natural treasures, as well as to the people who live in the country. Healthy ecosystems are the foundation for clean air and water, fertile soil and food. All South Africans depend on healthy ecosystems for economic and livelihood activities, including tourism and a number of income generating and subsistence level activities (SANBI, 2013).

The Medium Term Strategic Framework (MTSF) as well focuses on the creation of a framework for implementing the transition to an environmentally sustainable “green economy”. Through the green economy, South Africa can benefit from the opportunities opened up by global and local green economic activity, eco-innovations and green jobs. For instance, the greening of sports events has most notably reduced waste and energy use, reduction for carbon emissions and public education (MTSF, 2014). In addition, there are substantial job creation opportunities in programmes that contribute to Biodiversity Conservation.

The most recent water crisis in the Western Cape also poses a risk to the sector. In addition to the environmental effects of the water crisis, the number of tourists visiting the province is affected, which poses challenges for the Tourism, Conservation and Hospitality sub-sectors. With the various water restrictions put in place, health, safety and hygiene poses another challenge, especially in the Hospitality sub-sector. Overall, the sector needs to find innovative and strategic ways of planning and mitigating the effects of climate change on the sector through research and development; and investment in green qualifications. In addition, the Hospitality sub-sector needs to look into re-skilling employees on health, safety and hygiene to minimise the risks of contamination and exposure. Overall, there is an urgent need for curriculum innovation and re-skilling of educators and trainers. This should be done through coordination with the various sub-sectors, the cross-cutting nature of environmental concerns and the green economy.

2.2.7. Political and Economic Uncertainty

In recent years, the unstable political and economic situation in South Africa coupled with credit downgrades and political uncertainty has impact on the economic growth of the various CATHSSETA sub-sectors. According to recent stakeholder engagements, political instability and public protests not only deter international business but further disrupts the internal operations of businesses in the sector. For instance, with the recent public transport strikes, businesses have had to consider alternative transportation measures for their staff or providing accommodation in the workplace to mitigate the effects of such on the business. In addition, the increasing petrol and food prices may alter spending patterns, with people less likely to spend on activities and items considered non-essential and this will impact all six sub-sectors under CATHSSETA. Given the political and economic instability challenges, sectors need to consider measures to address the negative effects of these. The sector needs to look into planning and managing the image of their respective organisations to attract and reassure international interest in times of instability. This can be achieved through strategic marketing and public relations initiatives and promoting the brand of the various sub-sectors on media platforms.

2.3. 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 data analytics, web development, e-commerce, 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 technologically 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. Within the Gambling sector, there is a need for the development of entrepreneurial and managerial skills, particularly amongst previously disadvantaged groups to enable transformation in the sector.

Due to the changing nature of the sector, the convergence of industries in creative activities will require increased knowledge and skills that cut across industries. The Hospitality and Conservation sub-sectors need to invest more on succession planning, to facilitate for the low retention rate of young employees; this can be done through mentorship programmes to upskill youth in the sector and collaboration between HEIs, TVET colleges and Industry to facilitate a pipeline for the supply and demand of skills in the sector. Cross cutting green economy curriculum and skills development interventions. Given the political and economic uncertainties, organisations within the sector need to re-skill employees on strategic marketing and public relations interventions to plan and mitigate the effects of instability on the sector.

Based on the factors outlined above and stakeholder consultation, the following emerging occupations have been identified per sub-sector.

Table 5: Emerging occupations

Sub-Sector	Emerging Occupations
Arts, Culture and Heritage	Technology Professionals; Audio-visual 3D Technicians; Application Development Practitioners; Social Media Specialist; Musical Instrument Manufacturers; Knowledge Management Manager; Arts Attorney; Sculpture Machinery Operator; Craft Enterprise Product Development; Heritage Multimedia Specialist
Conservation	Veld Fire Fighters; Wildlife Trade Economist; Chief Information Officer; Technology Trainers; Taxonomist; Data Analyst; Stewardship Managers; Professional Hunters; Brownfield Redeveloper; Ecological Rehabilitation Professional; Social Media Specialist; Business Development Specialist; Community Engagement Specialist
Gaming and Lotteries	Application Development Manager; Customer Relations, Data Analyst and Marketing Data Analyst; Social Media Specialist; Website Designer; Customer Relations Specialist; Industrial Psychologist
Hospitality	Application Development; Business Analyst; Social Media Specialist; Training Manager; Revenue Manager; Guest Relations Officer; Online Booking Specialist; Shift Housekeepers; Dieticians; Filing Clerk; Accounts Manager; Operations Manager; Trends/Market Analyst; Facility Manager; Graphic Designer; Wellness Officer; Health and Safety Auditors; Occupational Health and Safety Officers; Food Safety Assurance
Sports Recreation and Fitness	Events Coordinator, Risk Manager, Payroll Manager; Research and Development Manager; Application Development; Sports Psychologists; Sports Agents; Event and Project Management; Sports Lawyer
Travel and Tourism	Legal Tourism Consultant, Business Development Manager, Business Solutions Specialist; Food Safety Assurance; Guest Relations Officer; Animal Behaviourist; Communication Strategist; Legal Tourism Consultant

Source: CATHSSETA Stakeholders consultations, 2018

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 the skills necessary to find and retain formal employment. With the enormous shifts in employer needs, considerable effort is required to improve literacy rates and general education levels rapidly, 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.

2.4. 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. Sector skills planning in South Africa takes into consideration a wide range of policy imperatives that seek to support inclusive sectoral growth, these may include those that relate directly to skills development. The policies and strategies are discussed below:

2.4.1. 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 an 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 Occupationally Directed Education, Training and Development Practices (OD-ETDP) programmes and other training programmes.

2.4.2. 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 the quality 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 through bursaries to employed as well as unemployed learners pursuing sector-related qualifications. In addition to this, CATHSSETA supports Work Integrated Learning (WIL) Interventions, Learnerships for both employed and unemployed persons and Skills Programmes that cater for the acquisition of critical skills for the employed.

In response to the NDP's vision of the TVET colleges becoming preferred institutions of vocational learning and the improvement of education at TVET colleges, CATHSSETA's role in building relationships between education institutions and employers is crucial. In addition to this action, the capacity of TVET colleges has been improved through interventions addressed at providing TVET college lecturers with exposure to industry. The successful review of the Chef qualification has been completed and the qualification is due to be launched this year to level 5 with QCTO. 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 the scope of these qualifications to be realigned to industry expectations and will ensure that TVET college graduates are readily absorbed into the labour market.

CATHSSETA has further responded to the proposals outlined in the NDP by ensuring that the directive on public entities' contribution of training budgets was communicated through 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.

2.4.3. 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 26 of 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 56% of employees in the sector are youth. Thus, the incentive encourages employers to continue employing from this age group. The sector, specifically Hospitality and Tourism, is characterised by the perception that it offers transitional employment and thus attracts employees that fall in 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 Act was extended to 2019 with an amendment that caps the incentive available to an employer at R20 million per year.

2.4.4. The National Skills Development Strategy (NSDS) III

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

Rural economic development and the 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 established regional offices. Rural development projects and support for unemployed youth within rural areas remain a focus with seven rural skills development projects implemented in the 2017/18 financial year and nine set for the 2018/19 financial year.

Transformation within the sector still remains a challenge but is encouraged through the utilisation of the NSDS III Developmental and Transformational imperatives which have been incorporated into the CATHSSETA criteria for allocation of Discretionary Grant funds. These criteria state that organisations need to take into consideration these developmental and transformational imperatives in order to access Discretionary Grant funding. All Discretionary Grant allocations within CATHSSETA focus on the promotion of these developmental and transformational imperatives.

2.4.5. Mandatory Grant applications

The table below provides comparative figures from 2014 to 2018 of the Mandatory Grant applications submissions received by the SETA. In the past three years, there has been a steady increase in the number of applications received. However, there is a decline in the number of Mandatory Grant applications in 2018, down to 1 148 from 1 337 in 2017.

Table 6: Mandatory grant applications received from 2014 - 2018

Year	Total submissions
2014	1 111
2015	1 231
2016	1 270
2017	1 337
2018	1 148

A majority of employers channel the Mandatory Grant received from SETAs back into their training budgets. A decline in applications could thus indicate a diminished focus on conducting training. This also impacts the quantity of data available on employers and employees in the sector, as fewer employers submit Mandatory Grant applications.

The current Grant Regulations do not require SETAs to have a policy on Mandatory Grants. Despite this, CATHSSETA has developed a Mandatory Grant policy guided by these Regulations in order to regulate the system. The Discretionary Grant policy and framework provides clear requirements regarding the allocation and distribution of these grants. The

impact of the Grant Regulations translated into the following: the window is now aligned to close at the same time as the Mandatory Grant (i.e. 30 April); and the Discretionary Grant 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 were 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 Mandatory Grant filters down to impact on the resources available for research, and this component falls under the non-PIVOTAL budget. CATHSSETA mitigates this shortcoming by establishing a national research network with Higher Education Institutions (HEIs) and through funding learners at post-graduate levels to research sector-specific topics, thereby linking PIVOTAL outcomes to increased research capacity within the sector.

2.4.6. The Strategic Integrated Projects (SIPs):

CATHSSETA's approach to SIPs funding has been integrated into the Discretionary Grant framework. The skills required for the delivery of the SIPs have been presented by the DHET and CATHSSETA has identified the following four skills which will be addressed by supporting a total of 60 persons through Work Integrated Learning (WIL) and Internship Programmes:

- Environmental Manager
- Programme or Project Administrator's Assistant
- Truck Driver
- Handypersons

2.4.7. New Growth Path

The vision is to create five million jobs by 2020. The plan sets out the key jobs drivers (areas that have the potential to create employment) and the priority sectors that will receive focus over the next few years. Tourism is one of the sectors that has been identified as a potential growth area. In order to develop these sectors, focus is on improving education and skills development, enterprise development, promoting small business and encouraging 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.

2.4.8. 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

Table 7: Sub-sectoral strategies and plans

Sub-sector	National Plans or Strategies	Implications for skills planning
Arts, Culture and Heritage	National Policy on South African Living Heritage	The policy stresses the importance of training courses in leadership and management having 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.
	Department of Arts and Culture Strategy 2012/13 (Mzansi Golden Economy)	DAC and CATHSSETA have identified a need for the provision of a coordinated skills development and training initiative as part of up-skilling local art organisations to host events, as well as training in the 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 at 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 heritage estates and assets as well as skills to do with the management of cultural heritage tourism. It is therefore imperative for CATHSSETA and DAC to work towards developing the required skills in Heritage Resource Management, among other interventions.
Arts, Culture and Heritage	National Heritage and Cultural Tourism Strategy 2012	The Strategy clearly illustrates the significant deficiencies of skills and qualifications available in heritage conservation and management. The strategy therefore 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. Through the QCTO process, CATHSSETA is thus making concerted efforts to ensure 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 the Arts, Culture and Heritage and the Tourism sectors.

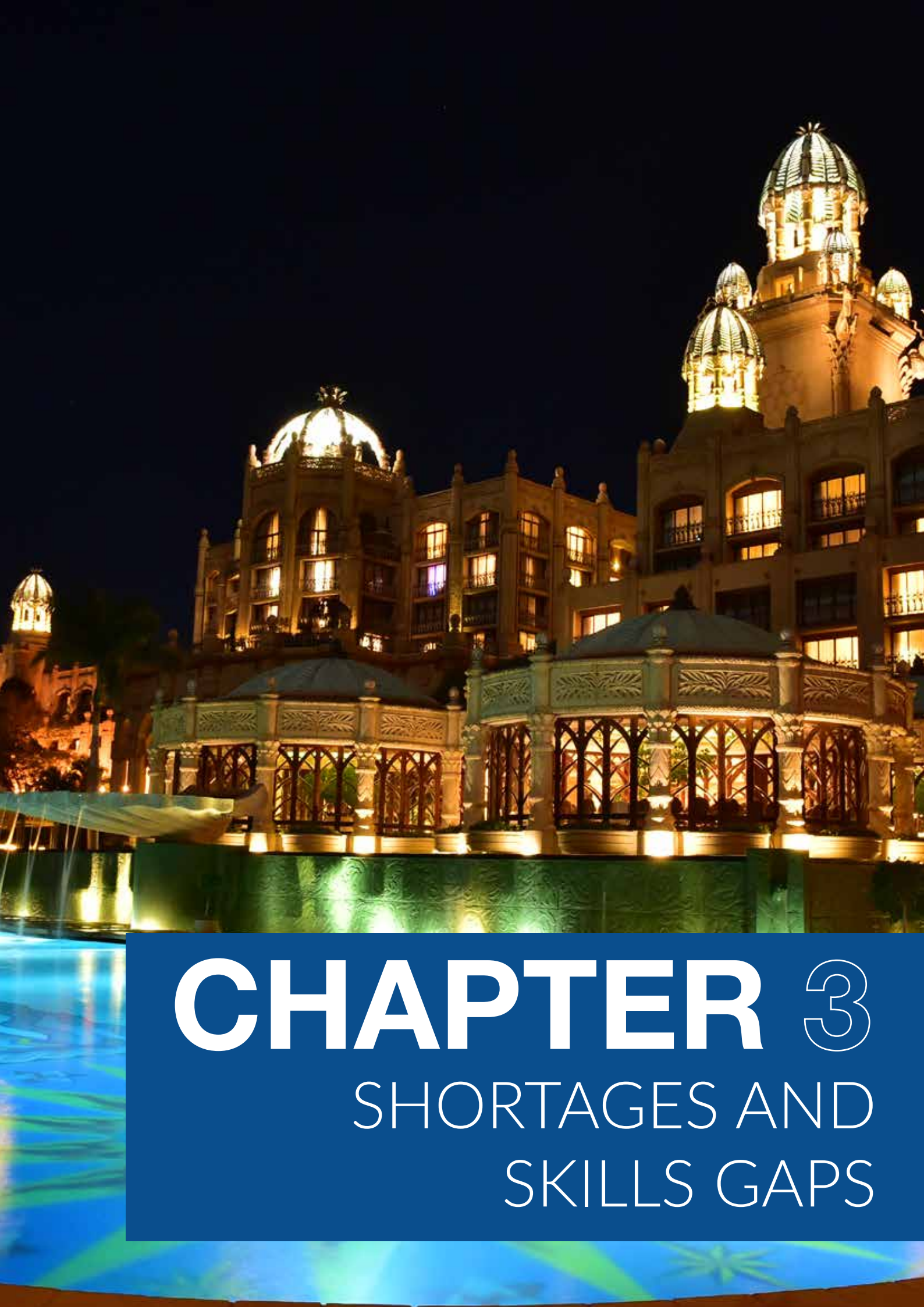
Sub-sector	National Plans or Strategies	Implications for skills planning
Conservation	The National Protected Area Expansion Strategy (2016)	This strategy aims to achieve cost-effective protected area expansion to encourage ecological sustainability and increased resilience to climate change. The implications of this for CATHSSETA is a need to focus on 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 occupational shortages and these 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, among other things, ensure that a holistic understanding of climate change and related issues are included in all relevant aspects of formal education curricula. This will enable all SETAs to 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 play is in the development and review of relevant qualifications as well as the funding of post-graduate scholars who will conduct research into the sub-sector.
	Department of Environmental Affairs Strategy	The strategy places significant emphasis on CATHSSETA, which is tasked with skills development for conservation bodies and agencies such as the South African National Biodiversity Institute (SANBI), South African National Parks (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's role is developing training initiatives.

Sub-sector	National Plans or Strategies	Implications for skills planning
Hospitality	National Development Plan	The plan sets a target of training 30 000 artisans by 2030. This falls directly into CATHSSETA's mandate of Artisan development. To address this need, CATHSSETA together with the QCTO has completed the review and registration of the Chef qualification as a trade. Successful registration and upgrade of the Chef trade with QCTO from NQF level 4 to NQF level 5. This new qualification is a three-year qualification with both a theoretical and practical component. At the end of the three years, the learner is required to complete a trade test in order to be classified an Artisan.
	Immigrations Act and Regulations	The amendments to the Immigrations Regulations Act of 2002 resulted in new Visa regulations being implemented in 2015. This brought about the repealing of the quota for exceptional skills work permits and the introduction of a category of Critical Skills Work Visa, which assists in attracting critical skills to the country. The Critical Skills Work Visa allows the sector 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 R2,959.35 and for employers with more than 10 employees to be R3,298.52. For CATHSSETA, this translates into the need to ensure that the funding criteria is in line with the Department of Labour in terms of the regulated minimum wage for the sector.
Gaming and 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 people with disabilities. All of these are specific areas of focus in the NSDS III.
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 to develop talent for the sport and recreation sector. For CATHSSETA, this translates into developing training and education initiatives aimed at developing sports and recreation personnel, particularly coaches and administrative and technical officials. The focus also encompasses developing 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 on training coach-developers as facilitators, assessors and moderators.

Sub-sector	National Plans or Strategies	Implications for skills planning
Sport, Recreation and Fitness	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. CATHSSETA will also 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 and Tourism	National Tourism Sector Strategy	The strategic objectives are organised into three 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.
	Tourism Human Resource Development Strategy (THRD) Strategy 2017- 2027	The THRDS was first launched in 2008 by the then Department of Environmental Affairs and Tourism (DEAT). The THRD Strategy is aligned to both the National Tourism Sector Strategy 2020 (NTSS) and NSDS III (DHET, 2015). CATHSSETA's role is to be part of the working groups that will ensure engagement of the Tourism, Hospitality and Conservation sectors concerning THRD matters. The role of CATHSSETA is to further assist in addressing workplace skills gaps, particularly strengthening soft skills in collaboration with other actors such as UMALUSI, TVET colleges and others.
	National Rural Tourism Strategy	Informed by the National Tourism Sector Strategy and the Domestic Tourism Growth Strategy, this strategy prioritises 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, offers positive support to rural development initiatives through special projects as well as extending its operational presence across various regions.
Travel and Tourism	Tourism Act, 2014	The Act regulates the Tourist Guide profession, and acknowledges the value and importance of the tourist guiding sector. It also provides for the registering of tourist guides, thereby recognising 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 needs of the Tourist Guides sector. CATHSSETA can also assist in developing curricula and implementing RPL pilot projects, especially on tourist guides as outlined by the THRD strategy.

2.5. 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 reflected in the profile of skills required by employers in the sector. Technology and work are now interlinked. This reveals a need for human resources with increased proficiency in using technology and greater cross-industry skills and knowledge. In addition, employers need a workforce with a more flexible skills base to be able to adapt to competing environments. FIR is anticipated to reshape skills with the creation of new jobs as well as losses. CATHSSETA needs to review future skills in view of this revolution. 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. Continuous engagements by CATHSSETA and other stakeholders will assist in providing appropriate and relevant strategies in addressing these change drivers.



CHAPTER 3

SHORTAGES AND SKILLS GAPS

3. CHAPTER 3: OCCUPATIONAL SHORTAGES AND SKILLS GAPS

3.1. Introduction

This chapter focuses on the occupational shortages and skills gaps as well as the supply of skills within the CATHSSETA sector. The main aim is to establish an understanding of occupational shortages and skills gaps. The chapter comprises of the following three sections:

- Occupational shortages and skills gaps
- Extent and nature of supply
- PIVOTAL list

The methodology employed draws on 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 that are hard to fill, numbers of enrolments and graduations as well as other supply-side information. Qualitative methods employed include focus group sessions and consultative sessions with industry stakeholders from all sub-sectors. The relevant qualitative findings, where available, have been compared to the quantitative results and the results are presented in the sections that follow.

3.2. Occupational shortages and skills gaps

3.2.1. Hard-to-fill vacancies

Hard-to-fill-vacancies (HTFVs) are defined as occupations that take longer than a year to find suitably experienced and qualified candidates. Analysis of the Mandatory Grant applications identified the hard-to-fill-vacancies presented in the table below. These are presented by sub-sector and indicate the number identified through the analysis

Table 8: Hard-to-fill-vacancies (htfvs) per sub-sector

Sub-sector	OFO Code	Occupation	Number of HTFVs	Reason for HTFV
Arts, Culture & Heritage	2017-235502	Private Tuition Dance Teacher	20	Budgetary constraints
	2017-651501	Rigger	6	Lack of suitable qualified candidates
	2015-263206	Heritage Consultants	2	Lack of candidates with required experience
	2017-352103	Sound Technician	3	Applicants do not meet equity requirement Budgetary constraints
Conservation	2017-213307	Park Ranger	13	Lack of suitable qualified candidates
	2017-324101	Veterinary Nurse	2	Lack of suitable qualified candidates
	2017-213109	Zoologist	2	Lack of suitable qualified candidates
	2017-226302	Health and Safety Officer	2	Lack of suitable qualified candidates
Gaming & Lotteries	2017-122101	Sales and Marketing Manager	2	Lack of suitable qualified candidates
	2017-335916	Gaming Operations Compliance Officer	2	Lack of suitable qualified candidates
				Lack of candidates with required experience
				Lack of candidates with required experience
Hospitality	2017-343401	Chef	12	Geographical position of the location is not favourable/remote High staff turnover
	2017-141201	Catering Managers	5	Lack of candidates with required experience
	2017-642601	Plumber	4	Lack of suitable qualified candidates
	2017-671101	Electrician	4	Lack of candidates with required experience
	2017-141201	Café (Licensed) or Restaurant Manager	3	Applicants do not meet equity requirements
				Lack of candidates with required experience
	2017-313907	Food and Beverage Manufacturing Process Controller	3	Lack of suitable qualified candidates

Sub-sector	OFO Code	Occupation	Number of HTFVs	Reason for HTFV
Sport, Recreation & Fitness	2017-226905	Biokineticist	7	Lack of suitable qualified candidates
	2017-143105	Sport Administrator	4	Budgetary constraints
				Lack of suitably qualified candidates
	2017-263406	Sport Psychologist	3	Lack of suitably qualified candidates
	2017-342204	Sport Coach	3	Lack of suitably qualified candidates
				Lack of suitably qualified candidates
Travel and Tourism	2017-524401	Customer Contact Centre Salesperson	6	Lack of candidates with required experience
	2017-422102	Travel Consultant	2	Lack of candidates with required experience
				Language barriers
	2017-243103	Marketing Practitioner	2	Lack of candidates with required experience
				lack of suitably qualified candidates

Source: CATHSSETA SMS 2018

Arts, Culture and Heritage: Private Tuition Dance Teacher occupation was listed as the top HTFV followed by the Rigger as well as the Sound Technician and Heritage Consultants. Budgetary constraints and lack of suitably qualified candidates were cited as the reason for these remaining unfilled. On the other hand, stakeholder consultations revealed that the top three HTFV are general manager, marketing interns and vocal lecturer.

Conservation: Park Ranger has the highest number of vacancies due to a lack of suitably qualified candidates, followed by Veterinary Nurse, Zoologist, and Health and Safety Officer. Gaming and Lotteries: Gaming Operations Compliance Officer occupation is reported as hard to fill, with a vacancy period of over 18 months. The reason for the vacancy is lack of suitably qualified candidates and lack of candidates with required experience as employers require candidates to have between one to three years' experience.

Hospitality: The Chef, Plumber, Electrician and Café (Licensed) or Restaurant Manager and Catering Manager occupations have the highest degree of scarcity. Stakeholder consultations also listed the Chef as one hard to fill occupation. These occupations remain unfilled for over 18 months. Lack of suitably experienced candidates, geographical position of the location not favourable/remote as well as high staff turnover is cited as the reason

for the Chef vacancies while applicants do not meet equity requirements as well as lack of suitably qualified people are the reasons for the lengthy vacancy period for the Café/ Restaurant Manager occupations. Lack of suitably qualified candidates is the main reason for hard to fill for a Plumber whilst lack of candidates with required experience is the reason to fill in for the Electrician. With the exception of the Dietician occupation, which requires a Bachelor's degree, employers seek candidates who have a certificate or diploma for these occupations and five to eight years' working experience. Baristas were also identified as a hard to fill vacancy, mainly owing to the fact that currently there is no accredited qualification for training of Baristas in the country.

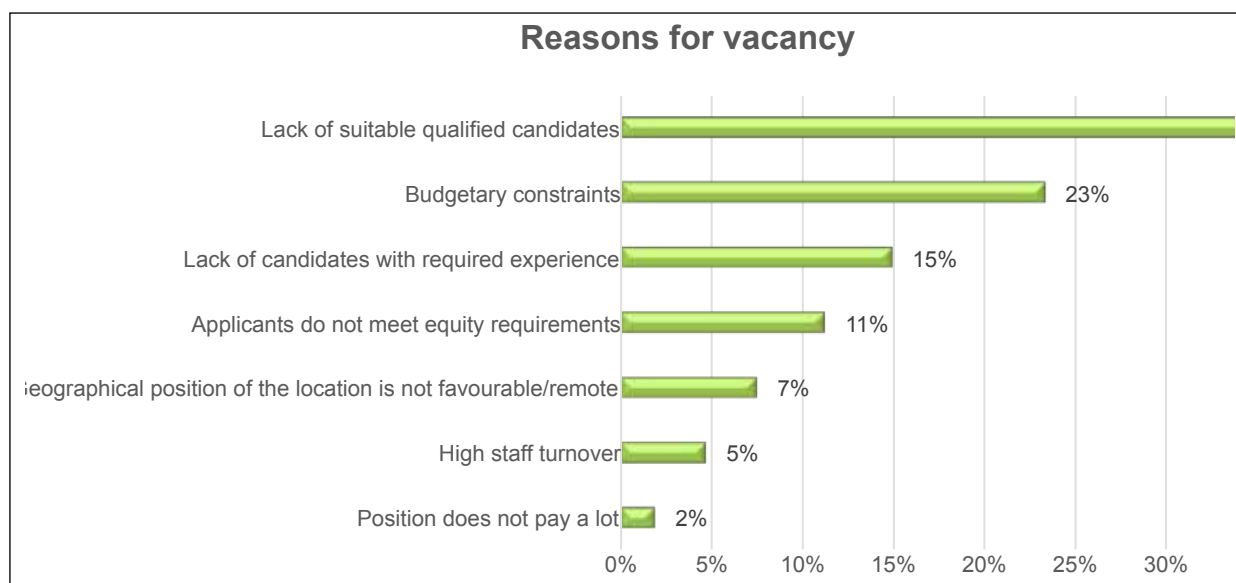
Sports, Recreation and Fitness: The Biokineticist, Sport Administrator, Sport Coach, and Sport Psychologist occupations have been identified as hard-to-fill occupations, whilst stakeholders listed the Accountant, Digital Administrator and Risk Manager as the top three. These occupations have a vacancy period of over a year. The reasons these occupations are hard to fill are due to the lack of candidates with required qualifications and budgetary constraints

Travel and Tourism: Of the occupations reported as hard to fill, the Customer Contact Centre Salesperson has the highest degree of scarcity and the lack of required qualifications is mentioned as the main reason for this. Travel Consultants and Sales and Marketing Manager and Marketing Practitioner are also hard to fill occupations due to the position not paying a lot as well budgetary constraints and language barriers. Stakeholder consultations indicated the Dolphin Trainers and IT Technicians as vacancies that remain unfilled.

3.2.2. Reasons for hard-to-fill-vacancies

The previous section detailed reasons vacancies remain unfilled for lengthy periods per sub-sector. Figure 10 below, indicates the sector's overall reasons for hard-to-fill occupations.

Figure 10: Reasons for vacancy



Source: CATHSSETA SMS 2018

A total of 36% of employers indicate that the main reason vacancies are difficult to fill is due to a lack of suitably qualified candidates. This is the case particularly in the Hospitality, Gaming and Lotteries, and Conservation sub-sectors and, to a lesser extent, in the Sport, Recreation and Fitness sub-sector. In the latter, the lack of suitably qualified candidates is the main reason vacancies are hard to fill. The other reason for hard-to-fill-vacancies cited is budgetary constraints. Lack of candidates with the required experience is another reason for hard to fill. According to employers during stakeholder consultations, some of the key issues which are fuelling the HTFVs were as follows: high turnover rate, company restructuring due to unstable sector, work pressure leading to high turnover, lack of (qualifications, experience, and people management skills), low salaries, high salary expectations and competition within the sector.

Overall, it would seem that the minimum requirements set by employers also contribute to vacancies. In most cases, employers seek employees who have skills at junior to middle management level and a minimum of a year's working experience, making it difficult for graduates without work experience to enter the industry. In addition to this, delays in updating curricula to address the needs of industry contribute to the number of hard-to-fill-vacancies. Budgetary constraints, reported by 23% of employers was also found to be prevalent within the Arts, Culture and Heritage; Hospitality; Conservation; and Sports, Recreation and Fitness sub-sectors, with most of the vacancies remaining unfilled for over two years. This could be an indication of a lack of relevant training in the sector or a mismatch between industry expectations and the training offered at learning institutions.

3.2.3. Skills gaps at Major OFO Group Level

Skills gaps refer to specific key or generic and “top up” skills that an employee requires to carry out job tasks competently. Key or generic skills include cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, ICT skills and skills to do with working in teams. Occupationally specific “top up” skills are those required for performance within that occupation to fill a “skills gap” that might have arisen as a result of changing technology or the introduction of new forms of technology. The most common skills gaps are indicated for each OFO Major Group level in the table below. These are ranked from most to least mentioned.

Table 9: Top 3 most common skills gaps per major ofo group level

Major occupations	Top 3 most common skills gaps
Managers	Leadership
	Time Management
	Communication
Professionals	Leadership
	Financial management
	Management
Technicians and Associate Professionals	Communication
	Customer Care
	Time Management
Clerical Support Workers	Customer Care
	Communication
	Time Management
Service and Sales Workers	Customer Care
	Communication
	Time Management
Skilled Agricultural, Forestry, Fishery, Craft and related Trades Workers	Customer Care
	Communication
	Time Management
Plant and Machine Operators and Assemblers	Communication
	Time Management
	Customer Care
Elementary Occupations	Customer Care
	Communication
	Time Management

Source: CATHSSETA SMS 2018

Based on the Mandatory Grant data and stakeholder consultations, Managers and Professionals both require leaderships skills which pertains to developing teams through coaching and mentoring. The most common skills gaps across the majority of the occupational

groups is communication, customer centric and/or service and time management skills. It is critical to have communication skills to convey information clearly and effectively, both in writing and verbally, and to have the customer care skills necessary for delivering excellent service. A lack of communication and customer care service skills was ranked first and second in the Plant and Machine Operators and Elementary Occupations major groups respectively. This is not surprising given that a large majority of employees in these occupation groups have Adult Basic Education and Training (ABET)/Adult Education and Training (AET) and NQF 1 and 2 level education, with few having acquired a matric. Sense of responsibility was also highlighted as lacking as well as work readiness.

As per the data received through 2017/18 Mandatory Grant data and stakeholder consultation sessions in 2018, skills gaps such as leadership skills, communication, and computer literacy are consistent with the findings of the 2016/17 Skills Audit Report. These findings thus corroborate with those of the Mandatory Grant data, in that employers highlighted the same areas as lacking and requiring further development.

3.3. Extent and nature of supply

In order to determine the supply of skills within the sector, Higher Education Management Information System (HEMIS) 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 educational profile of employees in the sector is presented per sub-sector in the table which follows:

Table 10: Education profile of employees per sub-sector

Sub-sector	Education level	Employees	Percentage
Arts, Culture & Heritage	AET	81	2%
	NQF 1,2	617	12%
	NQF 3,4,5,6	3 411	68%
	NQF 7,8,9,10	892	18%
	Total	5 001	
Conservation	AET	4 207	27%
	NQF 1,2	3 752	24%
	NQF 3,4,5,6	5 604	36%
	NQF 7,8,9,10	2 055	13%
	Total	15 618	

Sub-sector	Education level	Employees	Percentage
Gaming & Lotteries	AET	415	1%
	NQF 1,2	1 610	5%
	NQF 3,4,5,6	26 549	87%
	NQF 7,8,9,10	2 097	7%
	Total	30 671	
Hospitality	AET	5 190	4%
	NQF 1,2	25 323	20%
	NQF 3,4,5,6	88 401	70%
	NQF 7,8,9,10	8 065	6%
	Total	126 979	
Sport, Recreation and Fitness	AET	260	2%
	NQF 1,2	1203	8%
	NQF 3,4,5,6	12 830	84%
	NQF 7,8,9,10	979	6%
	Total	15 272	
Tourism and Travel Services	AET	165	1%
	NQF 1,2	1 096	7%
	NQF 3,4,5,6	13 025	79%
	NQF 7,8,9,10	2 257	14%
	Total	16 543	

Source: CATHSSETA SMS 2018

An analysis of the table above indicates that the majority of employees in the sector fall within the middle level skills band, i.e. NQF levels 3-6 for all sub-sectors. This is followed by employees within the low-level skills band at NQF levels 1-2 in the Gaming and Lotteries, Hospitality and SRF sub-sectors. This trend has not changed from 2017. The high occurrence of employees 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 Hospitality, G&L, T&T and SRF sub-sectors have the highest percentage of employees in 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 encouraged by the industry requirement that employees 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 these sub-sectors which often means that the candidate with the highest qualification and most appropriate experience is hired, which accounts for the majority of employees having middle-level skills and qualifications at NQF levels 3, 4, 5 and 6. The Conservation and Hospitality sub-sectors also have a significant percentage of employees at the low level of

skills, encompassing both ABET/AET and NQF levels 1 and 2. This is indicative of positions within the Elementary occupations OFO major group, which are characteristic of the sub-sectors.

The table below outlines the planned and achieved learning interventions as per the CATHSSETA Quarterly Monitoring Reports (2017/18). Overall, CATHSSETA overachieved on its planned targets by 18%. The majority of learners entering learning interventions were reported under Skills Programmes (2600), WIL programmes (1 500) and Bursaries (1 000). While the majority of learners completing learning interventions were reported under Skills Programmes (1 475), followed by WIL Programmes (750) and Learnerships (486).

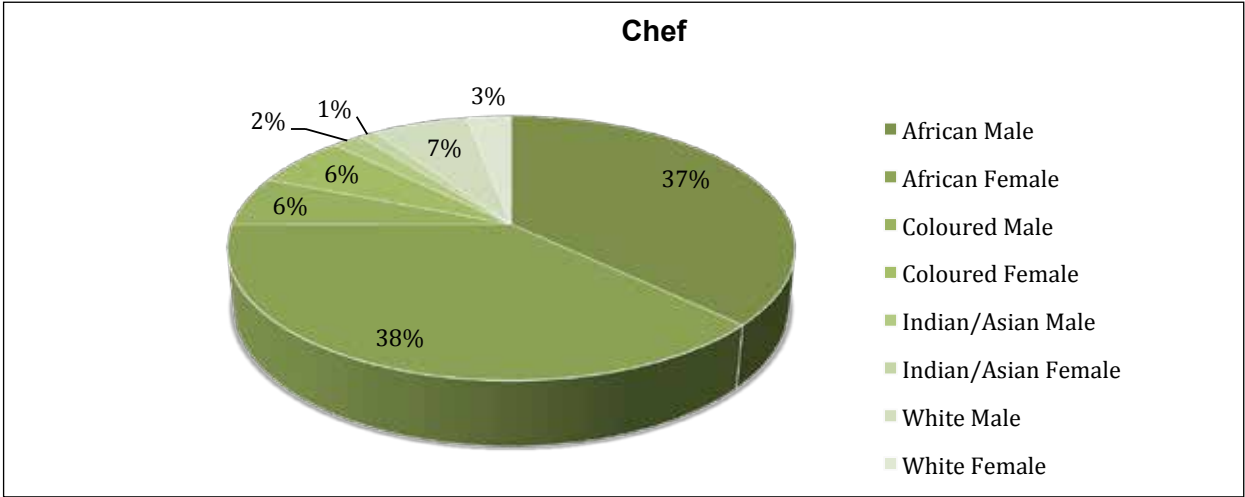
Table 11: Planned and achieved cathsseta occupationally directed programmes

Learning Intervention	Planned Target 2017/18	Achievement 2017/18
# of employed and unemployed learners entering Learnership programmes	450	543
# of employed and unemployed learners completing Learnership programmes	450	486
# of employed and unemployed learners entering Bursary programmes	1000	1186
# of employed and unemployed learners completing Bursary programmes	602	392
# of employed and unemployed learners entering Skills programmes	2600	3257
# of employed and unemployed learners completing Skills programmes	700	1475
# of unemployed learners entering Internships programmes	300	300
# of unemployed learners completing Internships programmes	300	312
# of Artisans entering training programmes	358	378
# of Artisans completing training programmes	173	191
# of TVET learners entering a WIL programme	1500	1733
# of TVET learners completing a WIL programme	750	750
# of university learners entering Workplace Experience	600	638
# of university learners completing Workplace Experience	300	139
# of ETD practitioners trained	100	82
# of TVET staff entering training programmes	80	230
# of TVET staff completing training programmes	40	82
# of Legacy Qualifications reviewed	6	5

CATHSSETA Quarterly Monitoring Reports 2017 - 2018

Artisans within the CATHSSETA sector fall into a multitude of trades. Some of these are the chef, butcher, confectionary baker, tailor, tool maker and welder trades. However, the only sector-specific trade is that of the chef. An analysis of this occupation is illustrated in Figure 11 below, which analyses the occupation in terms of the race demographic.

Figure 11: Demographic analysis of the chef trade



Source: CATHSSETA SMS 2018

As per figure 11, the sector employs a total of 7 634 Chefs down from 12 232 in 2017. This figure is based on the Mandatory Grant data from employers. The number of Chefs has decreased by approximately 15% from 14 367 reported in the 2016 period and another 38% decrease in 2018. A majority of the Chefs in the sector are Black African males and females, who make up 75% of the sub-sector. The least number is on the Indian/Asian females.

3.3.2. State of education and training provision

The Higher Education Institution (HEI) data, sourced from the Department of Higher Education and Training was analysed for the 2015 and 2016 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. More generic qualifications such as Business Administration Management and Operations have the highest proportion of enrolments and graduates. While Sports Creation and Movement, and Mind Body Therapy accounts for the lowest number of enrolments with no recorded graduates. The table below outlines the total number of enrolments and graduates in 2015 and 2016.

Table 12: HEI enrolments and graduations per sub-sector per qualification area

Sub-sector	Qualifications	2016		2015	
		Total Enrolment	Total Graduates	Total Enrolment	Total Graduates
Arts, Culture & Heritage	Dance	359	93	395	116
	Design and Applied Arts	3 412	890	3 429	915
	Drama/Theatre Arts	2 148	518	2 074	567
	Film/Video and Photographic Arts	1 108	319	1 063	316
	Fine and Studio Art	3 812	704	3 807	722
	Music	3 174	560	2 959	546
	Visual and Performing Arts, Other	26	14	27	8
Conservation	Botany/Plant Biology	2 191	446	2 100	346
	Zoology/Animal Biology	1 853	391	1 866	347
	Ecology, Evolution, Systematics and Population Biology	1 562	429	1 425	432
Hospitality	Food Science and Technology	2055	535	1 917	498
	Hospitality Administration/ Management	7371	1450	7 014	,350
	Foods, Nutrition and Related Services	1 414	322	1 266	234
Sport, Recreation & Fitness	Parks, Recreation and Leisure Facilities Management	2 986	712	2 878	654
	Movement and Mind-Body Therapies and Education	16	0	139	31
Travel and Tourism	Entrepreneurial and Small Operations	3 467	610	3 077	567
	Business Administration, Management and Operations	82 169	17 482	88 925	15 464
		119 123	25 475	124 361	23 113

Source: DHET HEMIS data 2015-2017

The Statistics on Post-School Education and Training (PSET) report includes 2016 enrolment and graduate statistics obtained from public and private Higher Education Institutions (HEIs), Technical and Vocational Education and Training (TVET) colleges, private colleges, and Community Education and Training (CET) colleges, as well as financial and workplace learning data for the 2016/17 financial year.

Overall, data shows that enrolments in Travel and Tourism courses at basic level are high. It is noteworthy that enrolment for Business Administration, Management and Operations, which is more generic has the highest number of enrolments as well as graduates. Movement and Mind-Body Therapies and Education had the lowest number of enrolments, with no graduates at all.

According to the THRD (2017), a fifth of graduates have never been employed since graduation, and even fewer learners and graduates aspire to find employment in the Conservation sub-sector. Factors which hindered employability of graduates include lack of ABET and poor work ethics. TVET graduates in particular struggle to gain experience and accordingly finding employment. There is evidence of misalignment between course content and the skills needs of the industry. This is in part attributed to limited or complete lack of engagement by many higher education institutions with the Tourism, Hospitality and Conservation industry stakeholders and other sub-sectors. There is growing need that course content of certain Tourism, Hospitality and Conservation courses be revised to align with current trends in technology, particularly those offered at TVET colleges as they are out-dated and revisions are long overdue. For example, the effects of the FIR need to be taken into account. CATHSSETA needs to assist sub-sectors to align with the current trends of technology for future skills needs.

Another very important source of skills for the sector is industry itself. The main methods of training include in-house training and work-shadowing, both of which are extremely practical and job- and workplace specific, and combine training with the work experience considered so important by the employer. It is difficult to determine with accuracy the supply of skills needed by the labour market that are necessary to support a growing and transformative tourism and hospitality sector. The supplier-driven nature of training within the sector reinforces this misalignment between skills demand and supply. The soft skill component of current courses offered by schools and TVET colleges is inadequate, a very real concern in an industry where such skills are vital. Importantly tourism related training is unable to equip graduates with the required skills to meet industry needs and demands (THRD, 2017). This applies to other sub-sectors as well within the sector.

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 SE profile. A defining feature of the tourism industry is that it is comprised of multiple small players that constitute about 94% of enterprises in the industry. This is a challenge in terms of addressing the Human Resource Development (HRD) needs of workers in this sector and has possibly contributed to the poor HRD practices in the industry.

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, there are no programmes in the TVET colleges that are

relevant to this sub-sector. Besides formal educational institutions accredited by the Council on Higher Education (CHE) and UMALUSI, CATHSSETA has accredited private providers to offer SRF programmes. And yet the need to increase the number of these providers' remains, 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 sub-sector qualifications.

The number of learners in the CATHSSETA sectors has been increasing in recent years however, graduates in the sector are generally viewed as not meeting employer expectations. The sector perception is that there is a mismatch between the skills and the academic knowledge with which graduates exit the higher education institutions and the required competencies to 'get the job done'. In addition, they were of the view that there is a lack of clear learning pathways and articulation. Findings from the Skills Audit (2016) also indicated that employers prefer candidates with two to three years' experience, followed by matriculants and then graduates. This could be an indication that, given the mismatch between the qualifications graduates have and industry requirements, employers perceive graduates as being of little benefit to the workforce and so that there is very little difference between a graduate's capabilities upon entering the labour market and that of a candidate with a matric. This emphasises the need for more employers to participate in skills development through internships and work integrated learning programmes to enable graduates to gain the level of skills required in industry. The need for intensifying internships in particular is supported by findings from the Impact Assessment (2016) which indicated that, of the surveyed learners, only 50% secured permanent or temporary employment.

The Tourism sector as a whole has a relatively low average level of education. Nearly 30% of all workers in the Tourism sector have a grade 10 or lower as their highest qualification. In addition, only 5% of all employees have a Bachelor's degree or higher, which is lower than the broader labour market Skills and Training Needs Analysis Survey Report (2016).

A graduate tracer study (conducted as part of the Labour Market study in 2016) found that, although there is a mismatch between industry needs and academic qualifications, most graduates reviewed secured employment. Of the sampled graduates in the Arts, Culture and Heritage sub-sector, 85% were employed. Furthermore, 82% were employed in the relevant industry. However, employment tended to be on a freelance basis due to the nature of the jobs in this sub-sector. The only full-time employment opportunities in this sector are for arts administrators. The same was observed in the Gaming and Lotteries sub-sector, with over 60% of graduates securing employment, and 82% working in the gaming sector. The

findings from the Sports, Fitness and Recreation sub-sector indicated that 48% of sampled graduates' secured employment in the industry related to their qualification. This sub-sector is dominated by volunteers and graduates, thus competing for available job opportunities. Though the labour market is recognising that sport and recreation can be a career path, the prospects for young graduates remain grim. This is due to graduates' lack of experience, sport organisations that do not recognise the potential of young graduates as opposed to older people with industry experience, and a general lack of opportunities for professional advancement.

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, Higher Education Institutions (HEIs), private training providers and industry training. The available information regarding the demand for skills in the Tourism sector indicates that the range of skills required is not confined to those generally regarded as 'tourism, hospitality and gaming' skills. A larger portion of the demand lies outside such a classification and includes: the more generic 'skills' that underpin a service ethic; the skills required to manage individual tourism products 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; and various entrepreneurial and 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, and vacancies remain unfilled due to this lack of suitably qualified graduates. Training provision in this sub-sector is mostly private-provider driven. There are challenges across all levels of education to do with this sector, from foundational learning through to preparing for access to higher learning, particularly in terms of biodiversity in the workplace. The current measures that are in place are therefore proving to be inadequate and more needs to be done to improve the current situation.

3.4. Pivotal List

CATHSSETA utilises a combination of data and labour market signals to monitor and determine the occupations that are difficult to fill. These inform the priority skills, the occupations of which are listed in the PIVOTAL list in the table below as approved by the CATHSSETA Board. Some of the data and signals used and observed are:

- All enterprises submitting Mandatory Grant applications (comprised of Planned Training Interventions and Reported training) completed a section on HTFVs in their sub-sectors
- The number of vacancies and degree of scarcity of HTFVs
- The pool of unemployed skilled people

Thus, the factors used to determine the occupational shortages and skills gaps include the following:

- o Data collected from Mandatory Grant application submissions
- o Input from relevant sector committees and focus group sessions
- o Surveys conducted nationally

All data and input are in the form of the six-digit OFO. Using the following formula; occupational shortages are identified as a function of two variables, namely, the total number of vacancies identified and degree of scarcity.

Following this, a preliminary list is generated, categorised and mapped using the six-digit OFO, NQF level, and interventions to address the occupation. Occupations that are to be addressed by PIVOTAL programmes are listed in the PIVOTAL list. This preliminary list is further subject to stakeholder consultations, prior to the generation of a final list of occupational shortages for the sector. The analysis and interpretation of these consolidated inputs are then augmented with research conducted by CATHSSETA and its partners. 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.

Occupations identified as occupational shortages form the basis on which priority skills are recognised. The identified occupational shortages are a function of two determinants: the number of vacancies in the sector and the degree of scarcity of the identified vacancies. The quantities needed are 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. Thus, a linear trend forecast where the generating process is assumed to be the linear model is used. Utilising the triangulation methodology for corroborating findings and as a test of validity, the identification of occupations as occupational shortages is then subjected to consultation with sector stakeholders. Occupations identified as scarce in the previous five years are also considered prior to generating the final list of occupational shortages.

The interventions required to address the occupations listed on the PIVOTAL list are informed by 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 with the SETA Grant Regulations, 80% of the CATHSSETA Discretionary Grants available are allocated to PIVOTAL programmes that address occupational shortages and skills gaps in the sector. It is envisaged that through the identified interventions, the occupations listed will be given funding in order to address the particular area of study and training that requires development. The envisioned outcomes from the identified interventions are improved employability of learners and upskilling of employed and unemployed people to occupy the occupations listed on the PIVOTAL list.

3.4.1. Top 10 PIVOTAL List for 2019/20

Table 13: Top 10 occupations on the pivotal list

Sub-Sector	OFO Major Group	OFO Code	Occupation	Specialisation/ Alternative Title	Intervention Planned By The Seta	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By Seta
Arts, Culture & Heritage	Professionals	2017-235502	Private Tuition Dance Teacher	Ballet Teacher	Bursary	6	20	47
	Skilled Agricultural, Forestry, Fishery, Craft And Related Trades Workers	2017-651501	Rigger	Hoisting Equipment Rigger, Rigger (Metal Engineering), Construction Cable Layer/Puller, Theatrical Rigger	Learnership	4	7	20
	Professionals	2017-263206	Heritage Consultant	Genealogist, Historians	Learnership	5	4	72
	Professionals	2017-213307	Park Ranger	Game / Park Warden, Wildlife Conservationist	Learnership	5	21	72
Gaming & Lotteries	Professionals	2017-335916	Gaming Operations Compliance Officer	Gaming License Administrator, Gaming Board Investigator, Casino Inspector and Gaming Control Officer, Gaming Compliance Manager	Learnership	3	4	66
Hospitality	Manager	2017-141201	Café (Licensed) or Restaurant Manager	Food and Beverage Manager	Learnership and Bursary: Food Beverage studies or services	6	57	120
	Technicians And Associate Professionals	2017-343401	Chef	Sous Chef, Demi Chef	Learnership: Professional Cookery	5	125	261

Sub-Sector	OFO Major Group	OFO Code	Occupation	Specialisation/ Alternative Title	Intervention Planned By The Seta	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By Seta
Sport, Recreation & Fitness	Professionals	2017-226905	Biokineticist	Exercise Therapist	Bursary	7	2	47
	Manager	2017-143105	Sports Administrator	Sports Team Manager, Sport Courses, Inbound Tour Manager, Travel Agent Representative, Travel Consolidator, Booking Travel Clerk, Travel Reservation Clerk, Booking Reservation Clerk, Travel Officer, Travel Arrangements Manager, Travel Agent, International Travel Consultant, Domestic Travel Consultant, Travel Wholesaler	Learnership	4	5	93
Travel & Tourism	Clerical Support Workers	2017-143105	Travel Consultant		Learnership	5	50	50

3.5. Conclusion

This chapter focused on understanding occupation-specific skills-mismatches identified by employers in the sector. In general, the large majority of employment in the sector falls within the low to middle level range of skills, which is typical of the services industry. The supply of skills, however, necessarily takes places at all three levels: low, middle and high. The skills mismatch occurs as a result of the disjuncture between supply and demand. The issue of skills gaps in the sector has been presented for each of the major occupational groups, the findings of which are corroborated by the (Training Needs Assessment) (TNA). A PIVOTAL list identifying the top occupations that will be addressed is presented in table 13.



CHAPTER 4

SECTOR PARTNERSHIPS

4. CHAPTER 4: SECTOR PARTNERSHIPS

4.1. Introduction

To achieve the identified strategic objectives of the SETA and national development priorities relevant to the sector, CATHSSETA recognises the need to form partnerships with:

- Public TVET colleges
- Higher Education Institutions and Universities of Technology
- Public entities
- Co-operatives, NPOs and community-based organisations
- Large employers and industry bodies within the sector

The partnership funding and selection criteria has been integrated into the Discretionary Grant (DG) framework through the Special Projects unit. This chapter focuses on existing SETA partnerships with the aim of establishing the state they are in and identifying the benefits associated with the partnerships. The secondary aim is to discuss new potential partnerships the SETA may form and how these may serve the SETA.

4.2. Existing partnerships

The SETA's existing partnerships are arranged into four groups; these are reflected in the sections below into which this chapter has been divided.

4.2.1. State of existing partnerships

This section of the chapter outlines the state of existing partnerships with educational providers and entities operating within the CATHSSETA sub-sectors:

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. The quality of training provided by the public providers is generally of a high standard. However, some public providers do face facility challenges, especially those of the TVET colleges which are not given a sufficient budget with which to upgrade their training facilities. Five

partnership projects established with TVET colleges, namely, Majuba TVET College and South West Gauteng TVET College on Work Integrated Learning as well as College of Cape Town, funding on bursary. Partnership with King Hintsa TVET College and KSD Colleges are still continuing for this financial year as the project is ongoing.

CATHSSETA has partnered with five TVET colleges in order to establish regional offices so as to become more accessible to stakeholders 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 eThekweni TVET colleges respectively. Offices in Limpopo are at the Capricorn TVET and these will also service the Mpumalanga province.

Higher Education Institutions (HEIs) and Universities of Technology (UoTs): CATHSSETA has partnered with six universities, namely, University of the Free State, Central University of Technology and Tshwane University of Technology for funding bursaries. Other partnerships are with Durban University of Technology for funding HET Placements, as well as Internship programmes with Tshwane University of Technology. CATHSSETA funds the bursaries, which cover the cost of tuition, books and accommodation with CATHSSETA over a period of two years.

Employers: As required by Goal 2 of the SETA's Strategic Plan and Annual Performance Plan, CATHSSETA forms partnerships with employers that address issues related to skills development to ensure that employees are capacitated to meet skills demands. Intervention programmes for the employers include bursary employed, learnerships, skills programmes and apprenticeship. Twelve partnership projects have been established with sector employers.

Public entities:

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

Sports, Recreation and Fitness: The SETA has entered into a partnership with the Department of Public Works to train 1 037 learners in the Expanded Public Works Programme (EPWP).

Travel and Tourism: The SETA 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. In the 2016/17 financial year, over 5 000 learners attended the expo.

CATHSSETA has signed a Memorandum of Understanding (MOU) with the national Northern Cape Department of Sports, Arts and Culture. Another MoU between CATHSSETA and the Department of Public Works with a focus on Hospitality and Tourism is currently running with two programmes having been concluded and one is ongoing.

NGOs

CATHSSETA has also partnered with seven NGOs, directly supporting them. These are Vemoni Recycling Trading, Youth in Action Organisation, South African Youth Council, Mangaung Drama and Dance. CATHSSETA provides funding for Work Integrated Learning and Learnerships for these NGOs.

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 –

- o The partnership with Ezemvelo KZN Wildlife that provided training addressing Customer Care for 623 employees at NQF level 4 and 20 employees at NQF level 5.
- o 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.
- o Fifty employed learners were trained towards a qualification in Sports Administration in partnership with Sports and Recreation South Africa (SRSA). About 339 were trained in partnership with the South African Sports Confederation and Olympic Committee (SASCOC) in Facilitator, Assessor and Moderator courses. These learners successfully completed the training.

Post-Graduate bursaries: Since the 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, the one with Rhodes University has had a number of successes: a number of Masters and PhD learners have produced research contributing to improve sector intelligence. Thus far, 23 recipients of bursaries (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 THRD strategy. The skills audit was completed in 2016 and the findings have been incorporated into this SSP. The partnership on the Women Executive Management Training Programme will see the first intake of learners completing the programme in June and graduating in August 2017.

Qualification Review: During the 2016/17 financial year, the Chef qualification was reviewed to increase its level from NQF Level 4 to NQF level 5. The review has been completed and upgraded to NQF level 5. CATHSSETA is also working with S.A Chef Association in developing criteria and guidelines to assist training providers in terms of consistency with assessment in developing the trade test. Negotiations for funding are also underway. In addition to the Chef qualification, a one year Cook qualification is also being registered and the registration has gone through all the stages and awaiting approval. In addition to the Cook qualification, Kitchen Hand and Food Handler will also be registered. Chef, Cook, Kitchen Hand and Food Handler, have been realigned and scoped to industry expectations to ensure that TVET college graduates may be absorbed into the labour market.

In the pipeline is a review of eight qualifications with QCTO. Desktop research was done to identify these occupations on the basis of occupations in high demand. Another 50 qualifications cutting across all sub-sectors still need to be reviewed with QCTO. Research will also be done by qualifications development facilitators registered with QCTO on assessing why private colleges have no learners registered in certain qualifications.

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 approved research programmes. As a result, the delivery of findings to the SETA is delayed which limits the usefulness of findings, given the need for recent, up to date information.

The partnerships that have been entered into for the development and review of qualifications have also presented certain challenges. Due to the voluntary nature of participation, and setting aside time for assigned tasks, travel and logistics as well as delays in the signing of contracts, the finalisation of qualifications poses a challenge. Sub-sector buy-in and budget constraints also pose a challenge to development of partnerships.

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 monitored only by the SETA and the appointed training provider and further involvement from the public entity's side, in terms of exercising oversight, is limited and relies heavily on the training provider. This is indicative of problems due to lack of role clarification and communication.

The challenge the SETA faced with TVET colleges is the lack of infrastructure geared towards responding to SETA requirements, for example, a lack of capacity enabling the preparation of relevant documents for programme approval. Another challenge encountered during the implementation of the programme is the delay in the recruitment of learners.

4.2.4. Strengthening of partnerships

In order to strengthen partnerships, it is imperative that the SETA takes better care of current partnerships, that there are more focussed engagements, and that there is a clear determination of roles and responsibilities.

In strengthening partnerships, CATHSSETA entered into a MOU with the South African College Principals Organisation (SACPO) to implement the TVET lecturer programme. SACPO, who is an independent association appointed by the Department of Higher Education to oversee all 50 TVET colleges in South Africa represented by the principals, comprising of a National General Council and a National Office.

To address the challenge of lack of participation by industry in the development and review of qualifications, CATHSSETA plans to increase stakeholder engagement and participation to solicit buy-in by building strong relationships with key stakeholders in the sector.

With the challenges faced with research provided by post-graduate learners in mind, the SETA has increased its capacity to address its research agenda by commissioning research projects, which also ensures timely delivery of research findings. In addition, CATHSSETA will be establishing a Research Chair to strengthen and promote research into the sector and funding post-graduate learners with a focus on the various sub-sectors through the Research Chair.

In strengthening TVET college capacity and infrastructure, the SETA plans to continue to implement capacity building projects and initiatives that include the strengthening TVET college Human Resource capacity, Governance structures and Infrastructure. Since 2015 to date, over 50 TVET lecturers spread across the Free State, Mpumalanga, KwaZulu-Natal, Limpopo and North West provinces have benefited from initiatives such as the Vocational Education Orientation Programme (VEOP). During the 2016/17 period, additional offices were established at TVET colleges in five provinces to foster easy accessibility and thus enable close communication.

To address the challenge of learner recruitment, the SETA has revised the application window period for Discretionary Grants such that there is sufficient time to recruit learners before the start of the academic year.

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 a 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 marginalised communities. The NHEIPE initiative aims to contribute to the coordination of Physical Education teacher training and will be piloted in four colleges, namely, uMgungundlovu, uMfolozi, Esayidi and Majuba TVET colleges, in which the Sport Coaching programme will be implemented. A partnership with SASCOC and industry players has been suggested so as to review the sport coaching qualification.

CATHSSETA, with other key strategic partners such as the NDT, UMALUSI and TVET colleges, will partner in the implementation of the revised Tourism Human Resources Development Strategy.

Special projects

New partnerships will include the following Disability Associations such as SA Disability Trust, institutions involved in Recognition of Prior Learning as well as entities involved in SE support.

Various stakeholders:

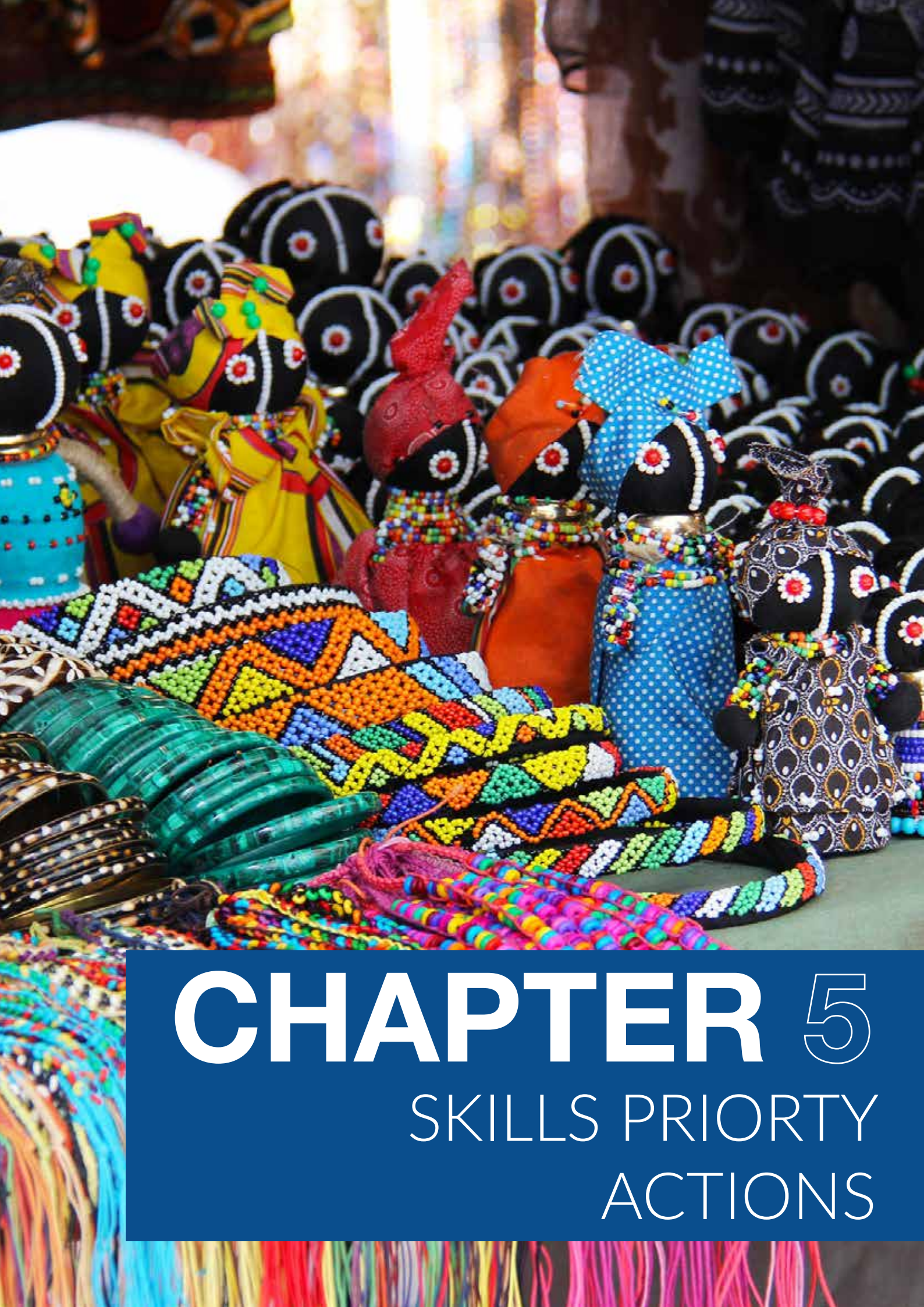
Partnerships with universities, TVET colleges and sector employers are currently being explored. The aim of these would be to improve stakeholder participation in sector skills development activities. The partnerships will enable CATHSSETA and these stakeholders to collaborate on areas of common interest.

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.

The SETA is also looking at possible partnerships with several organisations to address various skills interventions. These organisations include Midlands District Academy of Sport, South African Local Government Association (SALGA), SAFA, Northern Cape Department of Sports, Arts and Culture, and the North West Parks and Tourism Board.

4.4. Conclusion

This chapter has outlined the existing partnerships that the SETA has and detailed the nature of these partnerships. In order to deliver on the provision of learning programmes in an effective manner, CATHSSETA has partnered with employers, HEIs, TVET colleges, 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, the implementation of inter-SETA qualifications, the implementation of learning programmes, the placement of learners in internships and capacitating the TVET sector.



CHAPTER 5

SKILLS PRIORITY ACTIONS

5. 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 analyses from previous chapters have been reviewed and culminate in recommended actions that are realistic, consistent and achievable. This chapter provides a set of priority actions but 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 14: Key findings

Chapter	Key findings
Chapter 1	<ul style="list-style-type: none">• The vast majority of entities in the sector (94%) are small entities.• Overall, the country's Gross Domestic Product (GDP) grew by 1.3% in 2017, exceeding National Treasury's prediction of 1.0% growth. The strengthening in economic activity in 2017 can partly be attributed to the agricultural industry, which bounced back from one of the worst recorded droughts in history (StatsSA, 2018). Travel and Tourism sector contributed 2.9% to South African GDP.• The Gross Gambling Revenue (GGR) contributed R27 billion in 2017• Hospitality sub-sector employs the highest number of people in the sector, followed by Gaming and Lotteries. Arts and Culture has the least employees in all the sub-sectors.• The distribution of employees and employers is highest in Gauteng, Western Cape and KwaZulu-Natal provinces, and Northern Cape has the least.• Majority of employees in the sub-sector are black African with the Whites second and the least being Indians.• The majority of sub-sectors have a higher proportion of females with the exception of the Conservation sub-sector.• The age demographics illustrated in the table below show that the majority of employees in the sector (56%) are classified as youth (less than 35 years).• The sector currently employs 1 147 people with disabilities out of the 228 846 total employment in the sector, falling short of the 2% government has set to achieve.

Chapter	Key findings
Chapter 2	<p>Change drivers</p> <ul style="list-style-type: none"> • There has been increased technological advancements across the six sub-sectors e.g. online betting, use of internet to purchase, social media, mobile Apps and wearable technology in Sports. • The implication is that functional and technical skills will need to be accompanied by technological skills. • Social networking, marketing, e-commerce and digital marketing has become increasingly more mainstream in its use to attract and retain customers. • FIR brings in new technologies, reshaping the skills needs. • 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 is on the rise. This requires the skills base to meet the changing demand. • Employers need more flexible skills base which is able to adapt to competing environments. • Ageing generation, with entry level positions occupied by the youth and older people occupying higher level positions calls for succession planning and mentorship programmes to upskill the youth. Building a candidate pipeline through internships can assist in attracting and retaining students and graduates to organisation. Transitional programmes such as Work Readiness Programmes (WRP) can be a way of preparing and sensitising students on managing job expectations and work ethics. The sector needs to invest in training interventions and learning programmes favorable to the emerging green economy and climate change. The sector needs to find innovative and strategic ways of planning and mitigating the effects of climate change on the sector through research and development; and investment in green qualifications. • Given the political and economic instability challenges, sub-sectors need to consider measures to address the negative effects of these. The sector needs to look into planning and managing the image of their respective organisations to attract and reassure international interest in times of instability. • The sector needs to invest in training interventions and learning programmes favorable to the emerging green economy. • The key skills actions emanating from the above translate to keeping the qualifications and skills set of learners and educators relevant to rapid technological advancements in the sector.
Chapter 3	<p>Occupational shortages and skills gaps</p> <ul style="list-style-type: none"> • Vacancies are difficult to fill due to a budgetary constraints and lack of suitably qualified candidates • The most common skills gaps across the majority of the occupational groups is communication, customer care and time management skills. • Supply of skills • The majority of employees are in the middle level skills band, between NQF levels 3-6. • Enrolment and graduation rates of sector specific qualifications at HEIs increased by 3% and 12% respectively in 2015 • A total of 7 634 artisans work as Chefs in the sector, a 37% decrease as compared to the 2017 period. • Skills gaps • Graduates in the sector are generally viewed as not meeting employer expectations in terms of skills requirements. • The sector perceives there to be a skills mismatch between graduates and job requirements. • In order to bridge the skills mismatch between graduates and job requirements, the SETA needs to form strategic partnerships with industry to ensure industry requirements are aligned with qualifications and providers are kept informed of these requirements.

Chapter	Key findings
Chapter 4	<p>CATHSSETA recognises the need to form partnerships with:</p> <ul style="list-style-type: none"> - Public TVET colleges - Higher Education Institutions and Universities of Technology - Public entities - Co-operatives, NPOs and community-based organisations - Large employers and industry bodies within the sector <ul style="list-style-type: none"> • Successful partnership models which may be replicated, include the review of qualifications, research partnerships and career guidance events that 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, the labour market and skills audit studies have culminated in the following recommended actions:

5.3.1. Technological advancements:

Technology remains at the forefront of the overall sector's growth and development. New technologies brought about by the FIR are transforming the sector's operations. Taking this into account, the type, level and mix of skills required is starting to change, resulting in a need for reskilling programmes. A focus on ICT programmes will be important to prepare existing and potential employees to meet changing market conditions to ensure employees remain relevant and competitive in their respective sub-sectors. CATHSSETA should work to support and develop training interventions and form strategic partnerships to integrate technological advancements. Therefore, there is a need for curriculum review and new qualifications to address and stay abreast with emerging occupations and skills. In addition to the review of qualifications, the SETA should also explore and support new ways of learning, such as e-Learning and Virtual Reality Training in order for the sector to stay relevant and responsive to new ways of learning, both for new entrants and current employees in the sector.

5.3.2. Qualification review:

One of the reasons given for hard-to-fill-vacancies include lack of suitably qualified candidates. The SETA should consider conducting qualification reviews and an impact analysis to establish the relevance and effectiveness of its programmes and further identify what needs to be accomplished to address graduate development and the lack of suitably qualified candidates. Although qualifications offered at both TVET colleges and HEIs are deemed relevant to some of the sub-sectors, the general feedback from employers indicates

that there is a need to review them, 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 the actual revision of the curriculum. Education and training systems in the Tourism and Hospitality sub-sectors require the alignment of the curriculum with the needs of the industry and the changes in technology.

As discussed in the section on supply of skills in Chapter 3, research indicates that graduates from higher education institutions are largely unable to transition smoothly into the workplace, which has resulted in an increase in the number of employers in the sector providing their own certificate courses that 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)

These priorities will be addressed through the review of Legacy Qualifications falling within the scope of the CATHSSETA sector.

5.3.3. 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. The provision of training 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 who want to further their studies but cannot afford to attend universities or UoTs.

In order to address this, CATHSSETA will be monitoring the 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.

5.3.4. Analysis of skills needs:

There is a lack of recent, comprehensive research and statistics on some of the sub-sectors and concerted efforts are underway to remedy this. Continuous research efforts are thus necessary in order for the SETA to have sufficient intelligence on all its sub-sectors to inform the skills planning required, which should then enhance the data and information available on the sector. CATHSSETA is looking at appointing a Research Chair to assist in addressing this gap, thereby improving research output.

5.3.5. Workplace-based learning and experiential learning:

Workplace-based learning 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. Findings indicate that overall, learning pathways and articulation between courses and institutions are lacking. WIL placements appear to be a challenge for TVET colleges with only 41% of learners reported having WIL and practical experience as part of their course. This takes place through PIVOTAL programmes like Learnerships, Internships and WIL.

5.3.6. Mentoring and coaching

Stakeholder engagements revealed the ageing generation is one of the factors driving change in the various sub-sectors, with the youth occupying entry-level positions. CATHSSETA is exploring ways to strengthen mentoring and coaching offered during Work Readiness Programmes such as evaluating the training provided to mentors and coaches. Consistent with the Youth Employment Service (YES) initiative, which aims to prepare young people for employment, imparting technical skills that will underpin the industrialisation of the economy, CATHSSETA aims at partnering with relevant stakeholders in this initiative for future skills and reskilling of youth in the sector.

5.3.7. 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 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 staff to provide skills development training to lecturers.

5.3.8. Increased partnerships:

- o Partnerships between the education sector and employers facilitated by CATHSSETA are

critical to improving the quality of education in the sector. Education and training systems should work more closely with government, industry associations and employers in the sector in order to better understand the skills demanded by the sub-sectors and establish in-house training strategies that would assist graduates in gaining first-hand experience.

- o The development of a Coaching Framework in partnership with SASCOC and to address the issue of RPL of coaches, has been concluded. This ensures that coaches with the relevant experience and skills, but lack formal qualifications, are provided with an opportunity to gain recognition in the form of a formal qualification.
- o The partnerships that CATHSSETA has established with various HEIs has led to an increased number of learners enrolled in higher qualifications, including post-graduate students at Masters and PhD levels.
- 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.

5.3.9. Transformation in the sector:

One of the most consistent findings is the need for transformation in the sector at higher occupational levels, in terms of both the promotion of female employees; the support of black employees in higher occupational levels; and increasing the number of people with disabilities employed in the sector. In order to change the demographic profile of managers and professionals in the sector, the continued development of relevant skills is required to improve employment equity. While there have been marginal gains with regards to transformation female employees in managerial positions, women still constitute 47% of the workforce, and people with disabilities only constitute less than 1% of the total employment in the sector. 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 to 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 sub-sector strategies. These are implemented in the following manner:

- The SETA 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. The Chef qualification has now been registered with QCTO level 5.
- 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 will provide education and support to coaches – training has taken place for 379 facilitators, assessors (including RPL assessors) and moderators. Likewise, this will enable the implementation of RPL in support of fast-tracking the conferring of coaches' skills programmes and qualifications across all sporting codes within South Africa. This among other actions will include developing a curricula and implementing RPL pilot projects. CATHSSETA will partner with institutions engaged in RPL in terms of planning and implementation.
- CATHSSETA has prioritised a number of interventions to support. The National Protected Area Expansion Strategy (2008). Partly, the interventions that will be implemented include bursaries, learnerships and skills programmes as programmes that will assist in training on occupational shortages and skills gaps.

5.5. Conclusion

The CATHSSETA sector, with its varying sub-sectors, has been deemed a crucial driver of the South African economy. As such, investment in human capital development knowledge and skills has 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. No impact studies have yet been done to establish the extent of progress achieved. At this stage, it can be noted that one single stand-out achievement has been 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 realise that the effects of education and skills on productivity and innovations are generally positive and significant.



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ANNEXURE 1

OCCUPATIONS IN HIGH
DEMAND

ANNEXURE 1: OCCUPATIONS IN HIGH DEMAND

Sub-Sector	OFO Major Group	OFO Code	Occupation	Intervention	NQF Level	Quantity Needed	Quantity to be Supported by SETA
Arts, Culture & Heritage	Managers	2017-134901	Environmental Manager	Internships and Workplace Experience (SIPS)	6	83	83
	Professionals	2017-235502	Private Tuition Dance Teacher	Bursary: National Diploma - Dance Education	6	20	47
	Professionals	2017-263206	Heritage Consultant	Learnership: National Certificate - Heritage Resource Management	5	4	72
	Technicians and associate professionals	2017-352103	Sound Technician	Bursary: National Diploma - Sound Technology and Production	6	4	47
	Skilled agricultural, forestry, fishery, craft and related trades workers	2017-651501	Rigger	Learnership: National Certificate - Mechanical Handling (Rigging)	4	7	20
Conservation	Professionals	2017-213109	Zoologist	Bursary and Internships: Bachelor of Science - Zoology	7	2	130
	Professionals	2017-213307	Park Ranger	Learnerships: National Certificate - Nature Resource Guardianships Terrestrial	5	21	72
	Professionals	2017-226302	Health and Safety Officer	Skills Programme: National Certificate - Occupational Health, Safety and Environment	2	2	100
	Professionals	2017-324101	Veterinary Nurse	Bursary and Internships: Bachelor of Veterinary Nursing	7	2	120
	Managers	2017-122101	Sales and Marketing Manager	Bursary and Internship: National Diploma - Marketing Management	5	13	128
Gaming & Lotteries	Professionals	2017-241102	Management Accountant	Bursary: National Diploma - Management Accounting	6	2	47
	Technicians and associate professionals	2017-335916	Gaming Operations Compliance Officer	Learnership: National Certificate - Gaming Operations	3	4	66

Sub-Sector	OFO Major Group	OFO Code	Occupation	Intervention	NQF Level	Quantity Needed	Quantity to be Supported by SETA
Hospitality	Managers	2017-141101	Hotel or Motel Manager	Bursary: Management Development Programme	6	44	47
	Managers	2017-141201	Catering Manager	Bursary: National Diploma - Catering Management	6	7	47
	Managers	2017-141201	Café (Licensed) or Restaurant Manager	Bursary and Learnership: Food and Beverage Studies/Services	6	57	120
	Technicians and associate professionals	2017-313907	Food and Beverage Manufacturing Process Controller	Learnership: National Certificate - First Line Manufacturing Manager (Food and Beverage)	5	5	72
	Technicians and associate professionals	2017-343401	Chef	Learnership: National Certificate - Professional Cookery	5	125	261
	Service and sales workers	2017-512101	Cook	Skills Programme: Cook Convenience	2	16	100
	Skilled agricultural, forestry, fishery, craft and related trades workers	2017-642601	Plumber	WIL and Learnership: National Certificate - Plumbing	4	5	70
	Skilled agricultural, forestry, fishery, craft and related trades workers	2017-671101	Electrician	WIL and Learnership: Occupational Certificate - Electrician	4	9	20

Sub-Sector	OFO Major Group	OFO Code	Occupation	Intervention	NQF Level	Quantity Needed	Quantity to be Supported by SETA
Sports, Recreation and Fitness	Managers	2017-143105	Sport Administrator	Learnership: National Certificate - Sport Administration	4	5	93
	Professionals	2017-226905	Biokineticist	Bursary: Human Movement and Sports Science	7	2	47
	Professionals	2017-263406	Sport Psychologists	Bursary: Bachelor of Arts in Sport Psychology	7	2	47
	Technicians and associate professionals	2017-342204	Sport Coach	Learnership: Further Education and Training Certificate: Sport Coaching: Juniors/Beginners	4	1	62
	Technicians and associate professionals	2017-342301	Fitness Instructor	Learnership: National Certificate Fitness; Bursary: National Diploma	5	70	109
	Professionals	2017-243103	Marketing Practitioner	Learnership: National Certificate - Marketing Practice	5	8	30
Tourism and travel services	Clerical support workers	2017-422102	Travel Consultant	Learnership: National Certificate - General Travel	5	50	50
	Service and sales workers	2017-524401	Customer Contact Centre Salesperson	Learnership: National Certificate - Contact Centre and Business Process Outsourcing Support	4	6	30
	Managers	2017-112101	Director (Organisation)	Bursary: Business Administration; Management Development Program (SIPS)	8	46	46
ALL	Clerical support workers	2017-441903	Program or Project Administrators	Workplace (SIPS)	6	75	75
	Plant and machine operators and assemblers	2017-733201	Truck Driver (General)	Workplace (SIPS)	4	20	20
	Plant and machine operators and assemblers	2017-862202	Handyperson	Workplace (SIPS)	3	75	75

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