



Culture, Arts, Tourism, Hospitality and Sport Sector
Education and Training Authority (CATHSSETA)

SECTOR SKILLS PLAN

for 2021/22 - 2024/25



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA



FOREWORD

I have the pleasure of presenting to you the Sector Skills Plan (SSP) update for the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA), for the period 2020/21 – 2024/25. I join the CATHSSETA Accounting Authority (AA) at a time when the world has changed drastically overnight. It would be an understatement to say that the world will return to normal any time soon. The shockwave of the COVID-19 pandemic across the world has shocked and choked many economies out of breath, including ours. Given the type of sub-sectors in which the CATHSSETA operates, we find ourselves as one of the economic sectors most negatively affected by the COVID-19 pandemic.

On the 1st of April, 2020, the Minister of Higher Education, Science and Innovation, Honourable Dr Bonginkosi Emmanuel Nzimande, appointed a new CATHSSETA AA, including myself as its Chairperson to lead the AA for the next five years, until 2025. Indeed, I welcome the challenge and responsibility given to me, as I provide strategic direction for the AA and CATHSSETA. This appointment comes at a time when the country is under lockdown, as we put all possible measures in place to curb the spread of COVID-19. This is an invisible virus with a very real presence, and we need to take precautions to protect our employees, stakeholders and key role players. This situation forces us to face the reality and relevance of our existence as a Sector Education and Training Authority (SETA), as well as our value proposition. This is a time when the AA must take courage and demonstrate leadership in steering the organisation to recovery.

All six (6) CATHSSETA sub-sectors have been negatively affected by the COVID-19 lockdown. The once-booming tourism industry has come to a grinding halt. Travel and Tourism are forced to close shop for now. Sports, Recreation and Fitness barely survive, as all sporting activities have either been cancelled or have been postponed. The Arts and Culture sub-sector has also been negatively affected, as all types of productions have been halted until it is safe to continue with the productions. The Conservation sub-sector, which relies heavily on sectors such as Travel and Tourism, as well as Hospitality, has also closed down. The Hospitality sub-sector, which is our biggest sub-sector, had also closed down, until regulations were eased, recently, to allow local travel and accommodation services within the country. The Gaming and Lotteries sub-sector has seen a shift, as lockdown levels are eased in order to open up the economy, and casinos are allowed to operate. Horseracing and other related activities have stopped, except for online gambling.

This SSP has been prepared according to the guidelines and implementation of the National Skills Development Plan (NSDP), 2030. Our priority as a SETA is also to save the education and training year for our learners, training providers and employers. We need to invest in new modes of learning delivery that are online and can support learners during this pandemic. Consequently, we need to review our funding framework and create an e-learning policy to support online learning for our learners. Our funding

framework for the next 5 years must take into account the impact of the pandemic on the SETA base income which is derived from the 1% skills development levy, collected through SARS from employer payrolls.

As the SSP review process gets underway, it seeks to engage more of our stakeholders through research and information-sharing platforms, albeit virtually. It aims to gather information about the gaps and trends in our diverse sectors. More than ever before, we realise that there is much more that still needs to be done for sectors such as Conservation, Gaming and Lotteries, as well as the labour sector. During implementation, we will be looking into ways of empowering these smaller sub-sectors.

In conclusion, I would like to thank the Minister of Higher Education, Science and Innovation for his support and leadership during this time of uncertainty. It's to them that we look for strategic leadership in response to the aftermath of the pandemic. We commit to having our workplaces readied at Head Office and the Regional offices, in terms of sanitation and sterilisation measures, in line with the Directives of the Department of Employment and Labour concerning COVID-19.

We urge our stakeholders to exercise caution at this stage as the economy opens up for business gradually, and to look into different public and private relief funds that have been set up to assist those who have been most affected.

We look forward to improving how we can best implement our mandate and build on our successes, in order to contribute positively to society post COVID-19.

A handwritten signature in black ink, appearing to be 'David Themba Ndlhovu', written over a horizontal line.

David Themba Ndlhovu (Mr)
Accounting Authority Chairperson

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, the contents of the Sector Skills Plan Update for the period 2020/21 – 2024/25.

Approved by:



Keitumetse Lebaka (Ms)

Chief Executive Officer



David Themba Ndlhovu (Mr)

Accounting Authority Chairperson

ABBREVIATIONS AND ACRONYMS

4IR	Fourth Industrial Revolution	NHEIPE	National Higher Education Institute for Physical Education
AET	Adult Education and Training	NPO	Non-Profit Organisation
CATHSSETA	Culture, Arts, Tourism, Hospitality & Sport Sector Education & Training Authority	NQF	National Qualifications Framework
CET	Community Education Training	NSDP	National Skills Development Plan
CHE	Council of Higher Education	NSDS	National Skills Development Strategy
DAC	Department of Arts and Culture	NSRP	National Sport and Recreation Plan
DEA	Department of Environmental Affairs	NTSS	National Tourism Sector Strategy
DG	Discretionary Grant	OFO	Organising Framework for Occupations
DHET	Department of Higher Education and Training	PIVOTAL	Professional, Vocational, Occupational, Technical and Academic Learning
GDP	Gross Domestic Product	QCTO	Quality Council for Trades and Occupations
GGR	Gross Gambling Revenue	QMR	Quarterly Monitoring Report
HTFV	Hard-to-fill-vacancies	RPL	Recognition of Prior Learning
HEI	Higher Education Institution	SACPO	South African College Principals Organisation
HEMIS	Higher Education Management Information System	SALGA	South African Local Government Association
HRD	Human Resource Development	SAMSA	South African Maritime Safety Authority
ICT	Information and Communication Technology	SANBI	South African National Biodiversity Institute
KZN	KwaZulu-Natal	SANParks	South African National Parks
MTSF	Medium Term Strategic Framework	SARS	South African Revenue Services
MOU	Memorandum of Understanding	SASCOC	South African Sports Confederation and Olympic Committee
NCV	National Certificate Vocational	SAT	South African Tourism
NDP	National Development Plan	SETA	Sector Education and Training Authority
NGB	National Gambling Board	SIC	Standard Industrial Classification
NGO	Non-Governmental Organisation		

SIPs	Strategic Integrated Projects	TSA	Tourism Satellite Account
SEs	Small Enterprises	THRD	Tourism Human Resource Development Strategy
CIMS	CATHSSETA Information Management System	TVET	Technical and Vocational Education and Training
SPOL	Sectoral Priority Occupations List	UoT	University of Technology
SRSA	Sports and Recreation South Africa	WIL	Work Integrated Learning
SSP	Sector Skills Plan	WRP	Work Readiness Programme
Stats SA	Statistics South Africa	WTTC	World Travel and Tourism Council

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EXECUTIVE SUMMARY

CATHSSETA has compiled the SSP update for the period 2021/22. This SSP was prepared in accordance with Section 10 (1) (a) of the Skills Development Act (SDA) of 1998, which mandates the SETA to develop an SSP within the Framework and Guidelines included in the National Skills Development Plan (NSDP), 2030, for the period 2020 to 2030, as well as requirements set out by the Department of Higher Education and Training (DHET) SSP Framework and Guidelines. The key policy drivers identified and considered in this SSP are the National Development Plan (NDP), the White Paper for Post-School Education and Training, the SETA Grant Regulations and the National Skills Development Plan. 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 (THRD) Strategy, the Lotteries Act 32 of 2013, and the Department of Environmental Affairs (DEA) Strategy.

CATHSSETA is organised into six (6) sub-sectors—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 Gauteng, the Western Cape and KwaZulu-Natal. Overall, COVID-19 has affected the economic performance of the sector. Further research will need to be carried out in order to assess the overall impact of the pandemic on the sector, as well as its implications for skills development. Relative to the previous years, significant strides have been made towards greater representation and overall transformation of the sector. However, while the majority of employees in the sector are African females, the vast majority of these occupy lower occupational groups, indicating a need for further transformation of the sector. The majority of employees in the sector are classified as youth (under 35), indicating that the SETA needs to prioritise and support the development of youth in the various sub-sectors.

Change drivers influence skills demand and the supply of skills, either positively or negatively. CATHSSETA takes into consideration these drivers of change, and their inevitable implications on Skills Development, by directing relevant Programmes and Learning Interventions to support and/or mitigate their effects. The change drivers identified are the Fourth industrial revolution (4IR), Globalisation, Legislative Considerations and the Green Economy.

The analysis of the demand and supply of skills within the sector was assessed utilising Mandatory Grant application data and inputs from in-depth interviews and Focus Group sessions with relevant stakeholders. The analysis and interpretation of the consolidated inputs are augmented by research conducted by CATHSSETA and its partners. The data analysis was conducted as follows: (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, 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 intervention data were used; (f) analysed data was presented in the form of 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 experiencing shortages. The identified occupational shortages are a function of two determinants: the number of vacancies in the sector, and the degree of scarcity of vacancies identified. This function was developed on the basis of the behavioural relationship between vacancies and scarcity to occupational shortages.

Sub-sectors within CATHSSETA are forecast to experience continued strong growth in the coming years. 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 skills development priorities in the sector:

1. Fourth Industrial Revolution;
2. Training provision (skills supply, quality assurance: accreditation, assessment, certification and training providers);
3. Analysis of skills needs (qualifications review);
4. Increased partnerships to include worker-initiated interventions;
5. Transformation (mentoring and coaching, TVET and CET capacity-building);
6. SMME interventions and Green Economy (Resource Efficiency);
7. Monitoring and Evaluation;
8. Addressing occupational shortages and skills gaps (Skills Demand: Learning Programmes delivery); and
9. Technological advancement to combat the impact of COVID-19 pandemic.

The SSP contains six chapters. Chapter 1 presents the profile of the sector and examines the six sub-sectors, in terms of scope, key role-players, economic performance and labour market profile. Chapter 2 identifies key skills issues in the sector and their implications for skills planning, together with the policy frameworks affecting the demand and supply of skills in the sector. 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 sector partnerships that CATHSSETA currently has in place and new partnerships that are required. Chapter 5 reflects on the SETA's achievements of its strategic priorities based on its performance in the previous financial year. Finally, Chapter 6 summarises key findings from the previous chapters and identifies development priorities.

Approved By:



Keitumetse Lebaka (Ms)
Chief Executive Officer



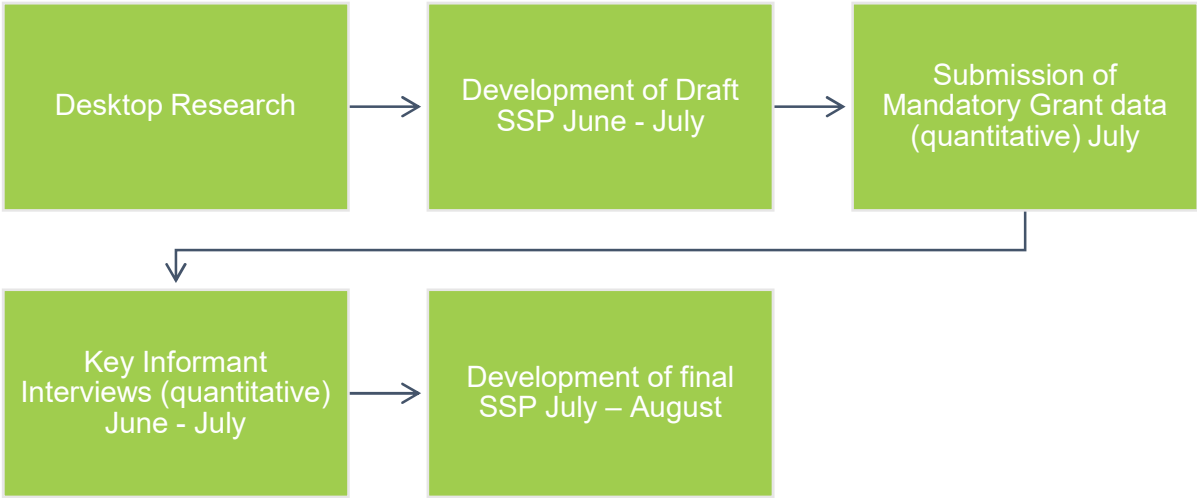
David Themba Ndlhovu (Mr)
Accounting Authority Chairperson

RESEARCH PROCESS AND METHODS

This section details the research process and methods CATHSSETA has used. The findings inform the update of the 2020/21 SSP. The process entailed conducting primary and secondary research for the collection of data. The methodology employed for this SSP included both qualitative and quantitative research methods. Desktop research was conducted on the economic, social and development status of the sector, utilising the Tourism Satellite Account (TSA) compiled by Stats SA amongst others. The 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), were also used. Primary sources of data included Mandatory Grant application data (which was previously the Workplace Skills Plan and Annual Training Report), the CIMS, as well as internal and external stakeholder consultative sessions to elicit further input into the Plan.

The process outlined in the figure below is followed on an annual basis. Owing to the COVID-19 pandemic, the SETA has had to amend its research processes. Instead of the usual face-to-face key informant interviews, the SETA conducted telephone interviews with key role-players, in July 2020. Normally, qualifying employers are expected to submit their Mandatory Grant applications by the 30th of April. However, DHET gave employers an extension to submit their applications by the 31st of July, 2020. The Mandatory Grant application process requires applicants to supply the SETA with specified data in order to be eligible for the grant. The updating of the SSP begins in February of every year and continues until the final submission, which this year was extended to the 31st of August, due to the Mandatory Grant application extension. Normally, stakeholder engagements are conducted in all nine provinces, between June – July, in order to validate initial findings. However, due to the current COVID-19 restrictions, this year's engagements have been postponed. The Research and Planning unit conducted desktop research using secondary data sources to examine economic performance in the country and change the drivers affecting the sector. These secondary data sources included GDP performance figures from Stats SA, the World Travel and Tourism Council (WTTC), the National Gambling Board, and information from the Department of Environmental Affairs, to mention a few.

FIGURE 1: SECTOR SKILLS PLAN UPDATE AND DATA COLLECTION CYCLE



The SETA conducted the research studies, detailed in the table below, during the 2019/20 period.

TABLE 1: CATHSSETA RESEARCH STUDIES

TOPIC	TYPE OF STUDY	OBJECTIVES OF STUDY	DATA COLLECTION TOOL	SAMPLE SIZE AND SCOPE OF STUDY	LIST OF DATA SOURCES	TIMEFRAME OF STUDY
Organising Framework for Occupations Baseline Study	Qualitative Study	<ul style="list-style-type: none"> - To discover the extent in which the CATHSSETA Sector understands the purpose of the OFO - To provide a starting point for a CATHSSETA OFO Handbook for 2020–2025. - To embark on a scoping exercise to clearly define the scope of the CATHSSETA OFO Handbook for 2020–2025 - To identify issues (e.g. occupations/specialisations/descriptors) in the current OFO that may require reconsideration in the 2020/21 OFO study - To provide qualitative information on the current status of the OFO in respect to the six CATHSSETA sub-sectors - To establish priority areas and planning mechanisms for consideration when compiling the Handbook - To identify the Key Role Players to be consulted during the development of the Handbook - To discover the extent to which the sector is utilising the OFO as a planning tool within their organisations. 	Focus Groups	<p>54 key informants;</p> <p>total of six focus group sessions, across the six CATHSSETA sub-sectors, in three provinces, Gauteng, Western Cape and Kwa-Zulu Natal</p>	CATHSSETA MG data; and stakeholder database	February – May 2020

TABLE 1: CATHSSETA RESEARCH STUDIES

TOPIC	TYPE OF STUDY	OBJECTIVES OF STUDY	DATA COLLECTION TOOL	SAMPLE SIZE AND SCOPE OF STUDY	LIST OF DATA SOURCES	TIMEFRAME OF STUDY
Labour Unions in the Sector	Quantitative Study	<ul style="list-style-type: none"> - To examine the extent of involvement of labour unions in the six CATHSSETA sub-sectors 	Online survey and telephonic interviews	445 employers	MG database Department of Labour list of Registered Labour Unions	December 2019 – March 2020
Effect of COVID-19 on CATHSSETA sub-sectors	Qualitative Study	<ul style="list-style-type: none"> - To examine the extent to which COVID-19 has affected training provision in the Sector - To assess the economic performance of the CATHSSETA sub-sectors amidst the COVID-19 pandemic - To determine ways to mitigate the effects of COVID-19 on training provision and skills development in the sector 	Telephonic interviews and desktop research	Desktop literature review; 20 key informant interviews	Desktop research; CATHSSETA stakeholder database	May – July 2020

Therefore, a range of data sources have been used to develop this SSP. These sources are:

1. CIMS is an electronic data management tool used for the processing of Mandatory Grants, certification and registration of qualifications, learners and skills development facilitators. CIMS is also a data-storage and reporting facility;
2. CIMS has a Discretionary Grant portal used to receive all Discretionary Grants online. This approach also requires that applicants register with CATHSSETA and provide the information necessary for profiling the sector;
3. Workplace Skills Plan (WSP) data on sector employment, as well as demographic and occupational profiles of employees per sub-sector. The total Mandatory Grant applications submitted in the 2020/21 period amounted to 1 193. Data for Mandatory Grants was collected based on the Organising Framework for Occupations (OFO), version 2019;
4. National data sources include the HEMIS, maintained by DHET, publications and reports by the WTTC, the NGB and SAT, as well as research conducted by other government departments, national research institutions and industry publications;
5. Another newly developed and useful dataset is the TSA by Stats SA. The TSA is an accounting framework adopted by the United Nations (UN) and designed to measure goods and services associated with tourism, according to international standards, concepts, classifications and definitions. The TSA provides stakeholders with reliable data to assist them in the design of public policies and business strategies for tourism and for the evaluation of their efficiency. Descriptive analyses (frequencies, cross-tabulations, percentage distributions and median ages) are used to summarise the data. The results are presented in table and graph formats. It is noted, though, that the TSA for the South Africa report does not provide any indication of the skills levels of the employees it reports on, and this is where CATHSSETA comes in. It should be creating a Partnership with TSA in order to assist Stats SA to capture the skills component;
6. CATHSSETA, together with the relevant national and provincial government departments in the sector, conducts research to ensure there is sufficient data to accurately analyse the labour market and the skills needs of the sector; and
7. Findings from online consultations with key sector stakeholders have been incorporated into this SSP update. Internal stakeholders (regional managers, relevant governance structures) also provided input.

CHAPTER 1: ECONOMIC 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. Key data sources include WSP data, Stats SA and sub-sector strategies. The chapter is organised into five main sub-sections:

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

1.2. SCOPE OF COVERAGE

CATHSSETA has clustered the standard industrial classification (SIC) codes 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.

It must be noted that the tourism sector is not measured as an industry in its own right in the national accounts, because tourism is not a clearly defined industry in the International Standard Industrial Classification (ISIC) of all economic activities, but rather an amalgamation of industries, such as transportation, accommodation, food and beverage services, recreation and entertainment, travel agencies, cultural industry, etc. (Stats SA, 2018:4). Stats SA explains that the tourism industries are classified according to the goods and services they produce, whilst tourism is a consumption-based concept depending on the status of the consumer.

The scope of a SETA is based on the standard industrial classification of all economic activities 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 within CATHSSETA's scope of activity, as listed in table 2. Most importantly, almost all the CATHSSETA SIC codes are now to a larger extent covered by the TSA, which brings great relief in measuring economic performance of the entire CATHSSETA scope of coverage.

TABLE 2: SIC CODES	
CONSERVATION	
11520	Hunting and trapping, including related services
96333	Game parks, reserves, including but not limited to, wildlife, parks, zoological or animal parks and Botanical Gardens
96334	Activities of conservation bodies
96335	Wildlife conservation, including wildlife, game, parks, game reserves, zoological establishments, Botanical Gardens
ARTS, CULTURE AND HERITAGE	
9003	Production of craft art
9004	Production of traditional art
9005	Production of designer goods
9006	Production of functional wares
9007	Production of souvenirs
96140	Dramatic arts, music and other arts activities
96141	Activities of artists and entertainers
96142	Activities of theatre and entertainment technicians
96143	Production of 'live' theatrical and artistic events
96144	Activities of arts councils and other related institutions
96190	Other entertainment activities N.E.C
96320	Museum activities and preservation of historical sites
96322	Provision for management and operation of monuments, historical sites and buildings
96323	Management and operation of museum, cultural and heritage activities
96492	The activities of casting for motion pictures, television and theatre productions
GAMING AND LOTTERIES	
96419	Operation and management of horse-racing events and clubs and academies
96494	Gambling, licensed casinos and the national lottery, but not limited to bookmakers, totalisators, casinos, bingo operators
HOSPITALITY	
64101	Hotels, motels, boatels and inns registered with SA Tourism
64102	Caravan parks and camping sites
64103	Guest houses and guest farms

TABLE 2: SIC CODES	
64104	Hotels, motels, boatels and inns not registered with SA Tourism
64105	Bed-and-breakfasts
64106	Management and operation of game lodges
64201	Restaurants or tearooms with liquor license
64202	Restaurants or tearooms without liquor license
64203	Take-away counters
64204	Caterers
64205	Take-away restaurants
64206	Fast food establishments
64207	Other Catering Services N.E.C including pubs, taverns, night clubs
64209	Other Catering Services N.E.C
84111	Timesharing
88994	Bioscope cafes
96195	Operation and management of convention centres
SPORT, RECREATION AND FITNESS	
93195	Operation and management of health and well-being centres, including, but not limited to, hydros, spas, fitness centres
96000	Recreational, cultural and sporting activities
96002	Recreational, leisure and outdoor adventure activities, including the management and operation of facilities, government departments
96196	Amusement parks
96410	Sporting activities
96411	Operation and management of sporting facilities and clubs
96412	Operation and management of sports academies
96413	Promotion and management of sporting events and activities
96415	Management and operation of non-motorised sporting activities
96417	Sporting activities, including, but not limited to, sports federations
96418	Management & operation of motorized sporting activities
96491	The Operation and Management of recreation parks & beaches, fairs & shows of a recreational nature & recreational transport activities

TABLE 2: SIC CODES	
TOURISM AND TRAVEL SERVICES	
71214	Tour operators (inbound and outbound tour operators)
71222	Safaris and sightseeing bus tours
71223	Safaris and sightseeing trip operators
73002	Inbound international flights
74140	Travel agency and related activities
85110	Renting of land transport equipment
85111	Renting of land transport equipment, including car rentals
8899A	Event and Conference Management
96195	Operation and management of Convention Centres
96336	Tourist Info Centres
99028	Car hire
99048	Tourism authorities, including, but not limited to, Tourism Marketing, Tourist Information Centres, Publicity Associations
99049	Guides, including Tourist river, mountain etc

1.3. KEY ROLE-PLAYERS

The sector is a regulated industry and has several key role-players, ranging from governmental regulatory institutions and employer representatives, to organised labour associations. Table 3 indicates the broad contributions each one of these make to the sector.

Their contributions range from paying skills levies, supporting SETA partnerships, representing the interests of the state, supporting skills development through various learning interventions, such as providing workplace mentorship and coaching. The key role-players provide CATHSSETA with the data and strategic information necessary for planning skills development interventions.

A number of self-regulatory bodies advances and advocates industry professional standards, which provide training requirements for skills development providers, educational practitioners and learners. Two key role-players are employer associations and organised labour. Most important are the accredited skills development providers, including institutions of higher learning.

Key national government departments, public entities and stakeholders involved in skills development practices, promotion and other industry skills development initiatives are listed, as are some of the key

organised employer stakeholders involved in advocacy, promotion and other industry skills development initiatives. Organised labour is involved in various ways in skills development and, for this reason, it constitutes an important role-player to be taken into account in skills planning processes.

TABLE 3: CATHSSETA KEY STAKEHOLDERS

Department	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> Department of Higher Education and Training, Department of Sports, Arts and Culture; Department of Tourism; Department of Environment, Forestry and Fisheries; Department of Employment and Labour; and Department of Trade and Industry. 	<ul style="list-style-type: none"> Higher education and training, skills development; Policy and Regulation within the Sports, Arts and Culture sub-sector; Policy and regulation, which is, amongst other things, a National Tourism Sector Strategy; Policy and regulation; Policy and regulation; and Policy and regulation, Custodian of the Industrial Policy Action Plan (IPAP). 	<ul style="list-style-type: none"> <i>Outcome 8: Support Career Development Services:</i> encourages the SETA to facilitate accessible career development opportunities. The SETA has partnered with various Departments, including the Department of Tourism for the National Tourism Careers Expo; Limpopo's Economic Development, Environment and Tourism Department for the Marula Festival; and DHET on the Mandela Day Career Development Festival; Skills development policy and regulation, planning for Higher Education and Training, Co-operation and resources; Research development and support; and Socio-economic Innovation; Contributes to the SETA administration fee; National Cultural Industries Skills Academy, NaCISA, is a special-purpose vehicle of the Department to support the Mzansi Golden Economy (MGE) Strategy, through Skills Development. The National Sports and Recreation Plan (NSRP 2030) advocates for accredited Education and Training Programmes; Contribution to the SETA administration fee; and, through the National Tourism Sector Strategy (NTSS), advocates the Tourism Human Development Strategy; Instrumental in driving the Environmental Sector Skills Plan, since 2010; Through Sectoral Determination and all labour matters in the SETA workplace; and Trade policy regulation and industry development, responsible for the gaming sector.

Public entity	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> • National Skills Authority; • National Skills Fund; • South African Qualification's Authority; • Quality Council for Trades and Occupations; and • Sector Education and Training Authorities. 	<ul style="list-style-type: none"> • Provides oversight; • Funding responsibility; • Registers and maintains standards for qualifications; • SETA Qualification's Authority; and • Facilitation of skills development and funding. 	<ul style="list-style-type: none"> • <i>Outcome 1: To identify and increase production of occupations in demand:</i> outlines various sub-outcomes aimed at increasing the identification and increase of priority occupations and qualifications in the sector. CATHSSETA is part of a Post-school Education and Training (PSET) research forum, together with other public entities in the PSET sector, to encourage learning and best practice approaches for labour market intelligence and the identification of skills needs; • Monitoring and accountability; • Funding support to the sector; • CATHSSETA registered qualifications; • Occupational qualifications; accreditation of Skills Development providers; and • SETA partnerships, cross-SETA MOAs for qualifications and accreditation.

Employer Stakeholder	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> Federated Hospitality Association of Southern Africa (FEDHASA); South African Football Association (SAFA); Tourism Business Council South Africa (TBCSA); Visual Arts Network of South Africa (VANSA); and South African Chef Association (SACA). 	<ul style="list-style-type: none"> Employer interest, regulations, professional standards and training; Single major sports' body in the country, regulating national professional football; Promotes interests of the private sector within the tourism industry; A national network of artists and arts organisations; and A network of chefs, cooks and culinary professionals. 	<ul style="list-style-type: none"> <i>Outcome 2: Linking education and workplace:</i> encourages employers to open workplace learning opportunities for students and graduates completing qualifications in the Sector. Outcome 2 together with <i>Outcome 5: Support the growth of the Public College system</i> to further encourage collaboration with TVET Colleges for the facilitation of TVET lecturer workplace exposure; Industry representation and partnerships within the Hospitality sub-sectors; Football industry representation and the promotion of skills development; Watchdog for the private sector within the area of tourism and the promotion of skills development; Develops industry knowledge, resources and networks, including skills development and professional standards; and Promotes the art and science of cooking by sharing knowledge and teaching skills development.
Employee stakeholder	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> South African Commercial, Catering and Allied Workers Union (SACCAWU); Hospitality Industries and Allied Workers Union (HIAWU); Hotel, Liquor, Catering, Commercial and Allied Workers Union of South Africa (HOTELLICA); 	<ul style="list-style-type: none"> Employees' interests group, lobbying labour matters in the commercial and catering sectors; Employees' interests group, lobbying labour matters in the Hospitality sector; Employees' interests group, lobbying labour matters in the hotel and catering sectors; Employees' interests group, lobbying labour matters in the creative arts sectors; and 	<ul style="list-style-type: none"> <i>Outcome 7: Encourage and Support Worker-Initiated Training:</i> encourages skills levy-paying institutions to collaborate with federations/trade unions in identifying skills needs and implementing relevant interventions for the sector; and Sector employee representation on the CATHSSETA AA.

<ul style="list-style-type: none"> • Creative Workers Union of South Africa (CWUSA); • South African Football Players Union (SAFPU); and • Board representation. 	<ul style="list-style-type: none"> • Employees' interests group, lobbying labour matters in the football sector. 	
Employee Stakeholder	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> • Universities; • TVET Colleges; and • SETA accredited providers. 	<ul style="list-style-type: none"> • Provides higher education and training; • Provide technical, vocational and occupational skills; and • Provide occupational skills training. 	<ul style="list-style-type: none"> • <i>Outcome 5: Support the growth of the Public College System:</i> advocates SETA support for TVET Colleges and Community Education and Training (CET) Colleges in implementing occupationally-directed programmes; • To offer training services to CATHSSETA stakeholders, particularly at higher national qualifications Framework (NQF) levels. Service delivery vehicle for the SETA; • To offer training services to CATHSSETA stakeholders for technical and vocational skills. Service delivery vehicle for SETA; and • Offer full and part occupational qualifications to employed and unemployed learners, particularly Learnerships, including workplaces. Service delivery vehicle for SETA.

1.4. LABOUR UNION INVOLVEMENT

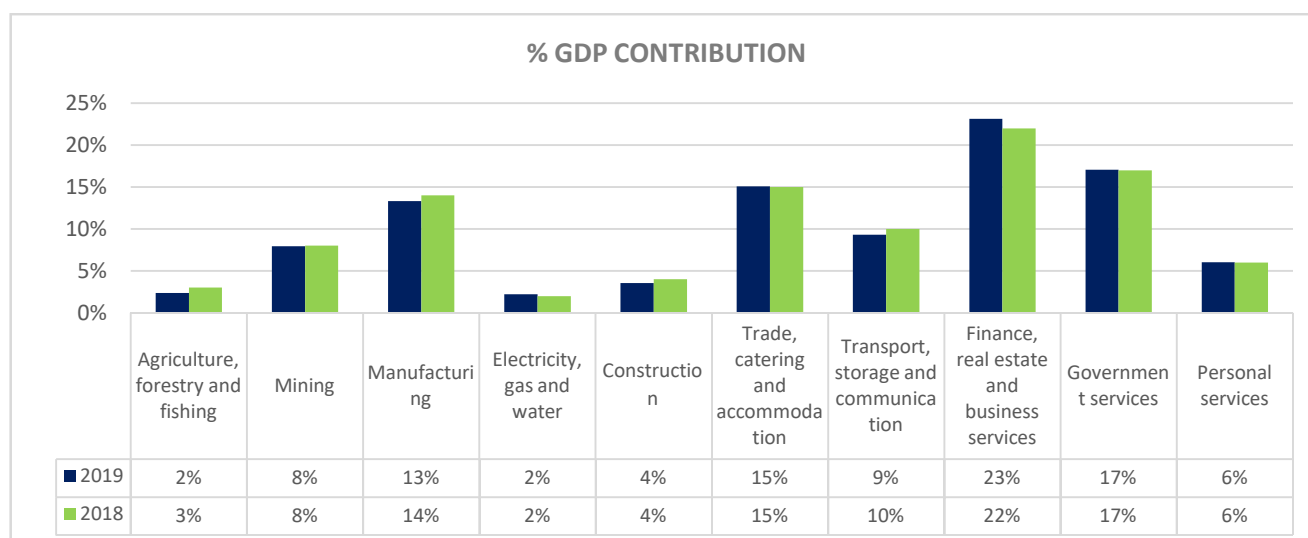
The NSDP places great emphasis on collaboration between the SETA, sector employers and Labour Unions. Outcome 7: Encourage and Support Worker-Initiated Training of the NSDP encourages employers and other skills levy-paying Institutions to collaborate with labour unions, in their respective sectors, to identify the required skills needs in the sector. This will enable the SETA to better understand the sector and to facilitate the implementation of relevant skills development interventions. In the 2019/20 financial year, CATHSSETA embarked on a study to examine the extent of labour union involvement in the six CATHSSETA sub-sectors. The results of the study revealed that, currently, 47 labour unions are active in the sector, with some labour unions active in more than one sub-sector.

TABLE 4: ACTIVE LABOUR UNIONS	
SUB-SECTOR	NUMBER OF ACTIVE LABOUR UNIONS
Arts, Culture and Heritage	2
Conservation	6
Gaming and Lotteries	5
Hospitality	31
Sports, Recreation and Fitness	5
Travel and Tourism	3

1.5. ECONOMIC PERFORMANCE

Skills development has many dependencies, such as people, the economy, the environment, political context, technology and legal frameworks. The South African economic and policy outlook is critical in providing an environment which is conducive to delivering high quality, world-class education and training. This section presents the CATHSSETA's contribution to the South African economy, and its comparison to the rest of the country's economy.

The economic performance of the CATHSSETA sector, as a whole, is difficult to assess due to the lack of a single comprehensive sector database, encompassing the six CATHSSETA sub-sectors. However, the figure below outlines the Stats SA Fourth Quarter GDP report, by percentage contribution, for 2018/19 to 2019/20 financial years. Consistent with the figures below, finance, real estate and business (23%) contributed the highest percentage, followed by government services (17%).

FIGURE 2: INDUSTRY VALUE-ADDED AND GDP (2018-2019)

Arts, Culture and Heritage

Natural heritage sites generated approximately R5 billion in 2016, 38% of which is reportedly generated indirectly (SACO, 2017). The Department of Trade and Industry (the dti) estimates that the crafts sector annually contributes R1 billion to GDP through the economic activity of approximately 7 028 Small, Medium and Micro-Enterprises (SMMEs). Over the last five years, the sector has shown an average growth of 8%, attributed to growth in Travel and Tourism. Overall, it is estimated that the cultural and creative industry sector contributes R63 billion toward GDP per annum, representing 1.7% of the total GDP (SACO, 2020). COVID-19 is expected to have an impact on the sub-sector on small businesses and employees in the sector. 65% of small businesses in the arts and music industries are projected struggle financially, and the film and tourism sectors are expected to retrench approximately 55% of their workforce (Fin24, 2020).

Travel and Tourism

According to WTTC, Travel and Tourism directly employs more people than the mining, communication services, automotive manufacturing and chemicals manufacturing sectors in South Africa. Business tourism is an area with significant growth potential and our country is amongst the top 15 long-haul business events destinations, globally. Travel and Tourism contributed R425.8 billion to the South African economy in 2018, making it the largest tourism economy in Africa. The sector is primarily driven by leisure travellers, with 64% of the Travel Economy generated by leisure visitors, and 36% by business travellers. The sub-sector is roughly balanced between international and domestic travel: 44% of the tourism spend emanated from international travellers and 56% from domestic travel. Nonetheless, the Travel and Tourism sub-sector is expecting 100 million job losses, globally, due to the COVID-19 pandemic (WTTC, 2020). In Africa, job losses are projected to go as high as 7.6 million, while the Tourism Business Council of South Africa predicts that approximately 600 000 direct tourism jobs will be lost in 2020 (News24, 2020).

Hospitality

The Travel and Tourism sector share linkages with the Hospitality sector. Three-star hotels are expected to be the fastest growing category over the next five year period. Related to this is the Airbnb market that has been growing rapidly in South Africa, in recent years. For instance, Cape Town Airbnb rentals increased from 10 000 in 2015 to 40 000 in 2018. Hotel room revenue rose only 0.5% in 2018, its smallest increase during the past six years. Growth is expected to pick up, beginning in 2019, and is forecast to expand to R 19.7 billion in 2023, up 3.3% compounded annually, from R16.7 billion in 2018 (PwC 2019). Between February 2019 and February 2020, the catering services industry percentage contribution to GDP decreased by 9.3%, an ominous picture of the R1 872 billion contribution in 2020, compared to the R2 064 billion in 2019 (Stats SA, 2020). This is largely due to the impact of the COVID-19 pandemic, which impacted the Hospitality sector in what is usually its highest season. The widespread global outbreak of COVID-19 brought the Hospitality industry to a halt, with the exception of some establishments catering to essential services. The Events Industry Council values the global MICE industry in excess of \$1 trillion. However, due to the pandemic, approximately 23% of the market has dissipated. (Biz Community, 2020).

Conservation

Wildlife economy focus areas, centred on the socio-economic benefits of eco-tourism, co-managed Conservation areas and ancillary services for protected areas. The value of ecosystem goods and services in South Africa is estimated to contribute R73 billion per annum, equivalent to 7% of the country's GDP (Department of Environmental Affairs, 2019). The Live Auction Sale Industry contributed R1.7 billion to the economy, in 2016. Consumptive hunting contributed R8.6 billion to the economy, in the year 2015 (35% growth 2013-2015), while wildlife products contributed R4.5billion to the GDP, in the year 2014 (Department of Environmental Affairs, 2018). There is limited data on Eco-tourism wildlife ranching, which is a thriving industry in South Africa that 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. The travel ban between the United States (US) and South Africa, due to COVID-19 hit South Africa during the tourist season. As a result, a string of US hunting trade shows due to take place in South Africa have been cancelled. Industry estimates that American hunters comprise 45% of the foreign consumer market for South African hunts (PERC, 2020).

Gaming and Lotteries

Despite a challenging and weakening economy, gambling revenues improved in South Africa. Gross gambling revenues in the country posted their second-largest annual increase over the past five years, with casinos taking the largest share of this growth by rising 4.5% over the prior year. South African gross gambling revenues across the market (excluding the National Lottery), are expected to expand from R23.9 billion in 2014 to R30.3 billion in 2019, a 4.8% compound annual increase. Bingo is

expected to continue to be the fastest growing category during the next five years with a projected 19% compound annual increase in gross gambling revenues, from R1.1 billion in 2014, to R2.7 billion in 2019. Sports' betting is projected to rise at a 12.5% compound annual rate, to R2.9 billion in 2019. While the National Lottery is expected to remain the slowest-growing category gross gambling revenues from the National Lottery are projected to rise from R2.28 billion in 2014 to R2.33 billion in 2019 (PWC, 2018).

While the traditional gambling industry is facing unparalleled losses due to the COVID-19 pandemic, online gambling sites have reported a surge in activity since the national lockdown in March 2020 (Yahoo Finance, 2020).

Sports, Recreation and Fitness

The Sport, Recreation and Fitness sub-sector contributes substantially to national, regional and local GDP. A study conducted in the Western Cape, titled "Case for Sport", showed that sport contributed in excess of 2.2% (R8.8 billion) of the Western Cape's GDP, displaying clear potential for increased contribution to economic growth and tourism, while continuing to promote social inclusion and physical activity (Western Cape Department of Cultural Affairs and Sport, DCAS, 2019). Interest in sport for development has increased in the past decade, as organisations recognise its social, health and economic values (Barry & Marshall, 2015). Since the outbreak of COVID-19, sporting events have been cancelled or postponed, which has had a major impact on the Industry, globally. While further research still needs to be carried out on the specific figures and financial impact that the pandemic has had on the sector, there is growing concern that the global sporting industry, worth billions of dollars and employing millions of people - whether directly or indirectly - will collapse.

The SMME Sector

Approximately 95% of entities under CATHSSETA are categorised as SMMEs, and economic growth is strongly linked to small business development. It is estimated that South Africa has 2.25million SMMEs, of which over 785 000 are located in Gauteng, 373 000 in KwaZulu-Natal and 250 000 in Limpopo. As a whole, SMMEs account for 42% of the National GDP. In order to mitigate the effects of COVID-19 on the sector, a Tourism Relief Fund has been made available by the Department of Tourism to provide once-off grant assistance to SMME businesses in the tourism value chain. Capped at R50 000 per entity, the Fund can be accessed by accommodation establishments, hospitality and related services, and travel and related services, such as Tour Operators.

1.6. EMPLOYER PROFILE

Information on the number and size of entities registered with CATHSSETA was sourced utilising CATHSSETA's SARS Hufefile. The figures are presented in the table below.

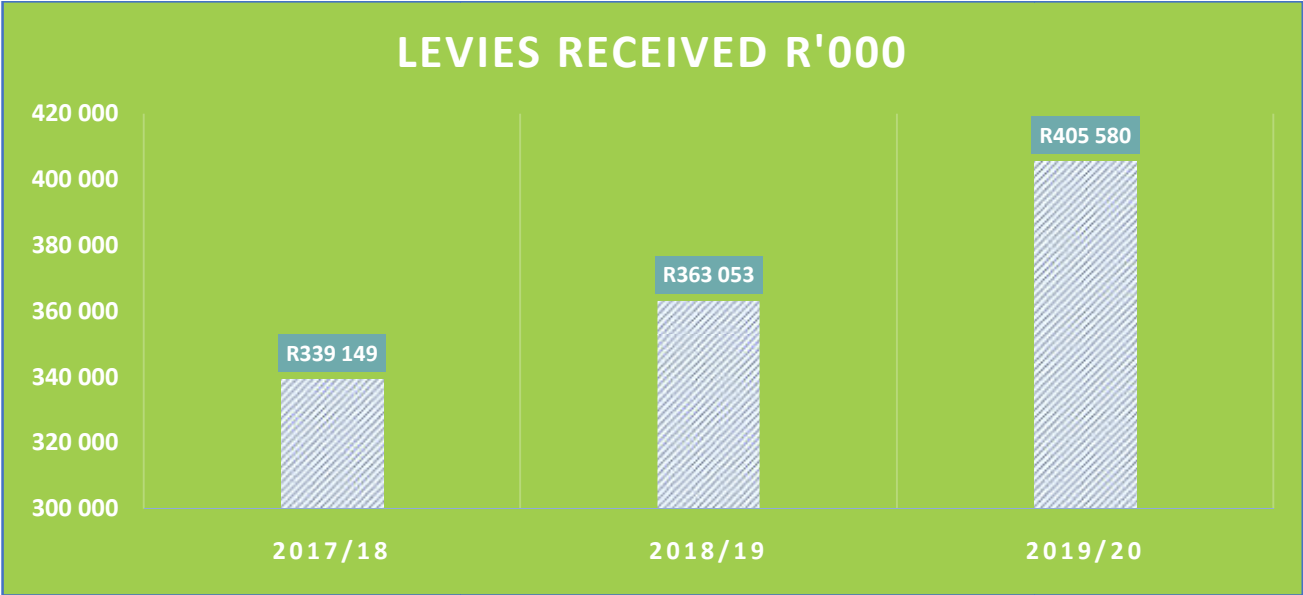
TABLE 5: NUMBER OF ENTITIES REGISTERED WITH CATHSSETA					
SUB-SECTOR	SIZE OF ENTITY			NUMBER OF ENTITIES REGISTERED WITH CATHSSETA	% IN THE SECTOR
	SMALL (1-49)	MEDIUM (50-149)	LARGE (150+)		
Hospitality	27 901	780	404	29 085	72%
Tourism and Travel Services	3 423	103	93	3 619	9%
Sport, Recreation and Fitness	2 695	99	91	2 885	7%
Arts, Culture and Heritage	2 520	80	87	2 687	7%
Conservation	1 662	41	37	1 740	4%
Gaming and Lotteries	376	62	64	502	1%
Total	38 577	1 165	776	40 518	100%
	95%	3%	2%	100%	

Source: CATHSSETA SARS Hufefile, 2019/20

The number of entities shows a slight increase from 39 824, in 2018/19, to 40 518, in 2019/20, amounting to an increase of 694 entities in the sector (2%). The slow increase can be attributed to two main factors. Firstly, COVID-19 has disrupted trade, worldwide. This is especially true in the case of SMMEs and sub-sectors, such as Travel and Tourism and Hospitality. South African companies that have built markets on the back of an integrated global network have been the most vulnerable and affected by the pandemic. Whilst further research still needs to be carried out on the overall impact of COVID-19 on the sector, literature shows that businesses in the country have had to close temporarily due to lack of local demand and the impact of the national Lockdown on business turnover and trade. Secondly, the SETA reported an increase in the number of Inter-SETA transfers, where entities that have, previously, been misaligned and classified by the Commissioner of the South African Revenue Service (SARS), with CATHSSETA, have moved to other SETAs. In 2018/19, of the 39 824 employers, the Hospitality sub-sector accounted for the vast majority of employers in the sector: 72%, followed by 9% employers in Travel and Tourism. The least represented sub-sector was Gaming and Lotteries (1%). Overall, 95% of the sector comprised of SMMEs, which have increased by 1% from the previous year. These SMMEs are predominantly exempt from payment of the Skills Development Levy (SDL). Taking into account the large size of the overall sector, combined with the fact that SMMEs make up 95% of the latter, the allocation of resources becomes a challenging task.

To examine levy income from organisations within the sector, the below figure compares the total levies received in the past three-year period, from the 2017/18, 2018/19 and 2019/20 financial years. The total levies received from employers have increased by approximately 12%, from R363 million, in 2018/19, to R405 million in the 2019/20 financial year.

FIGURE 3: LEVIES RECEIVED IN THE 2017/18 – 2019/20 FINANCIAL YEARS



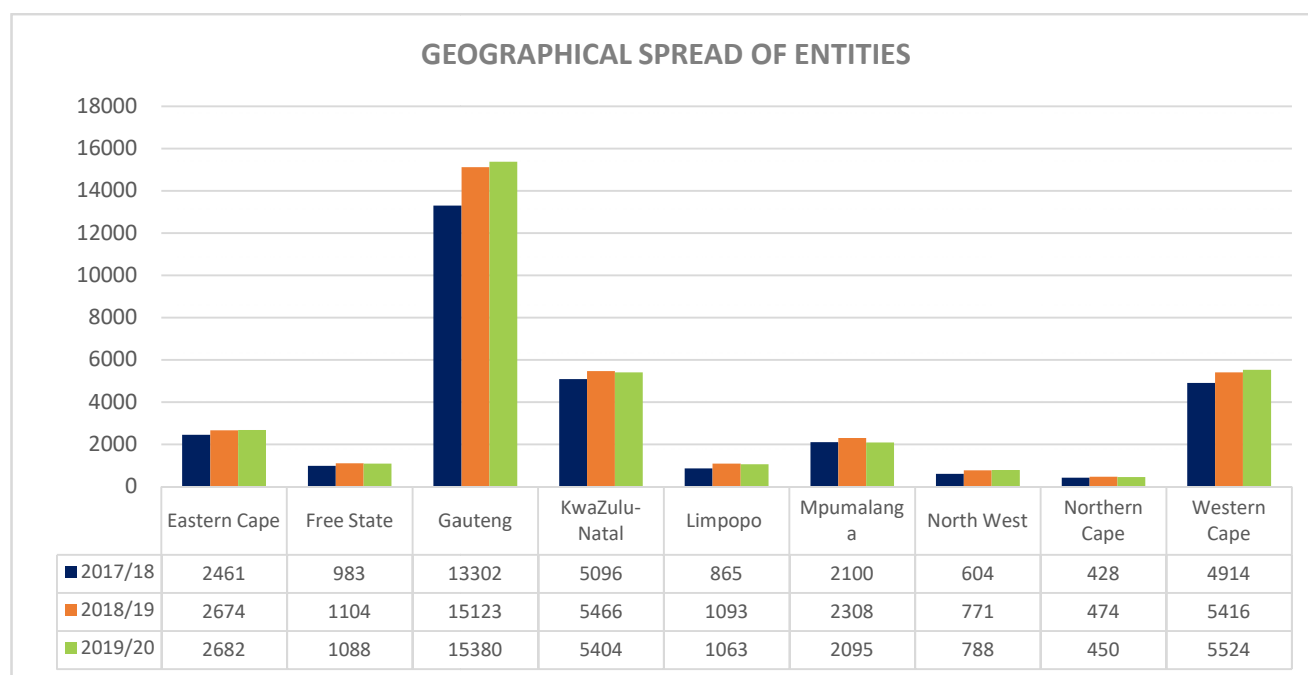
Source: CATHSSETA Unaudited Annual Financial Statements, 2019/20

The total number of levy payers increased by 17%, from 7 246 in 2017/18, to 8 486 in 2019/20. Out of the total 40 518 entities registered within the sector, only 20% contribute to skills levies. Approximately 50% of the levy income received, as regulated, is directed to sectoral priority occupations training interventions in the sector.

As part of the National Disaster Management Tax Relief Fund, employers in the sector have been given a 4-month SDL payment holiday. Effective from 1 May 2020, there will be a four-month holiday for Skills Development Levy contributions (1% of total salaries) to assist employers in the sector with cash flow for their respective businesses. This is estimated to provide a relief of approximately R6 billion, which translates into a revenue loss of R6 billion to the SETA system as a whole.

The geographical spread of entities in the sector is illustrated in figure 3 below, with the majority (45%) located in Gauteng, followed by the Western Cape and KwaZulu-Natal, respectively, accounting for 16%. The least-represented provinces include the Free State (3%), the North West (2%) and the Northern Cape (1%).

FIGURE 4: GEOGRAPHICAL LOCATION OF ACTIVE ENTITIES CONTRIBUTING TO SDL



Source: CATHSSETA SARS Hugefile, 2020/21

1.7. LABOUR MARKET PROFILE

The labour market profile provides an outline of the number of people employed in the Sector; the demographics of employees— including race, gender, age and disability; and the geographic and sectoral spread of employees. This information was sourced utilising the CATHSSETA's WSP.

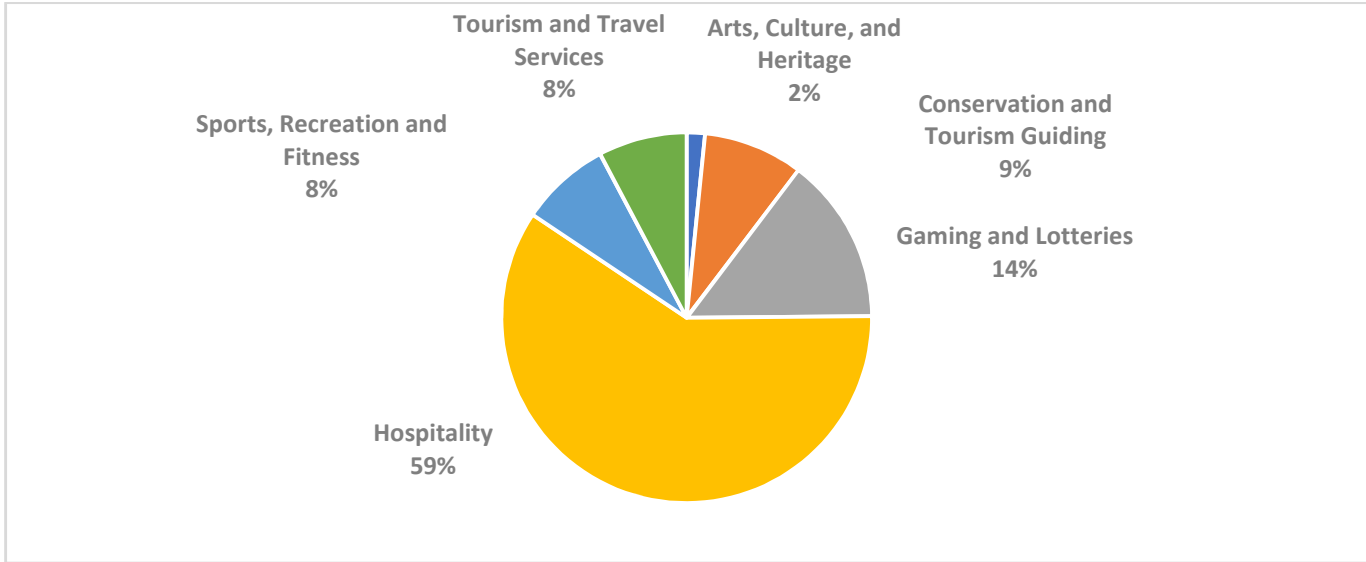
The table below illustrates the total number of employees in the sector by sub-sector, as well as employee trends over the last three-years. A total of 210 933 employees are employed in the sector. There has been a 5.85% decline from the 2018/19 figure of 224 039.

TABLE 6: NUMBER OF EMPLOYEES IN THE SECTOR							
Sub-sector	2018/19	2019/20			2020/21		
	# of employees	# of employees	Growth/	% Increase per year	# of employees	Growth/	% Increase per year
			decline			decline	
Arts, Culture and Heritage	5 489	7 371	1 882	34.29	3 380	-3 991	-54.14
Conservation	16 072	17 513	1 441	8.97	18 384	871	4.97
Gaming and Lotteries	31 014	32 395	1 381	4.45	30 663	-1 732	-5.35
Hospitality	129 797	135 208	5 411	4.17	125 605	-9 603	-7.10
Sports, Recreation and Fitness	29 487	14 873	-14 614	-49.56	16 602	1 729	11.63
Tourism and Travel Services	16 987	16 679	-308	-1.81	16 299	-380	-2.28
Total	228 846	224 039	-4 807	-2.10	210 933	-13 106	-5.85

Source: CATHSSETA WSP data, 2020/21

The figure below provides a percentage breakdown of employees per sub-sector. Consistent with the table above, the majority of employees are employed in the Hospitality sub-sector (59%), followed by Gaming and Lotteries (14%).

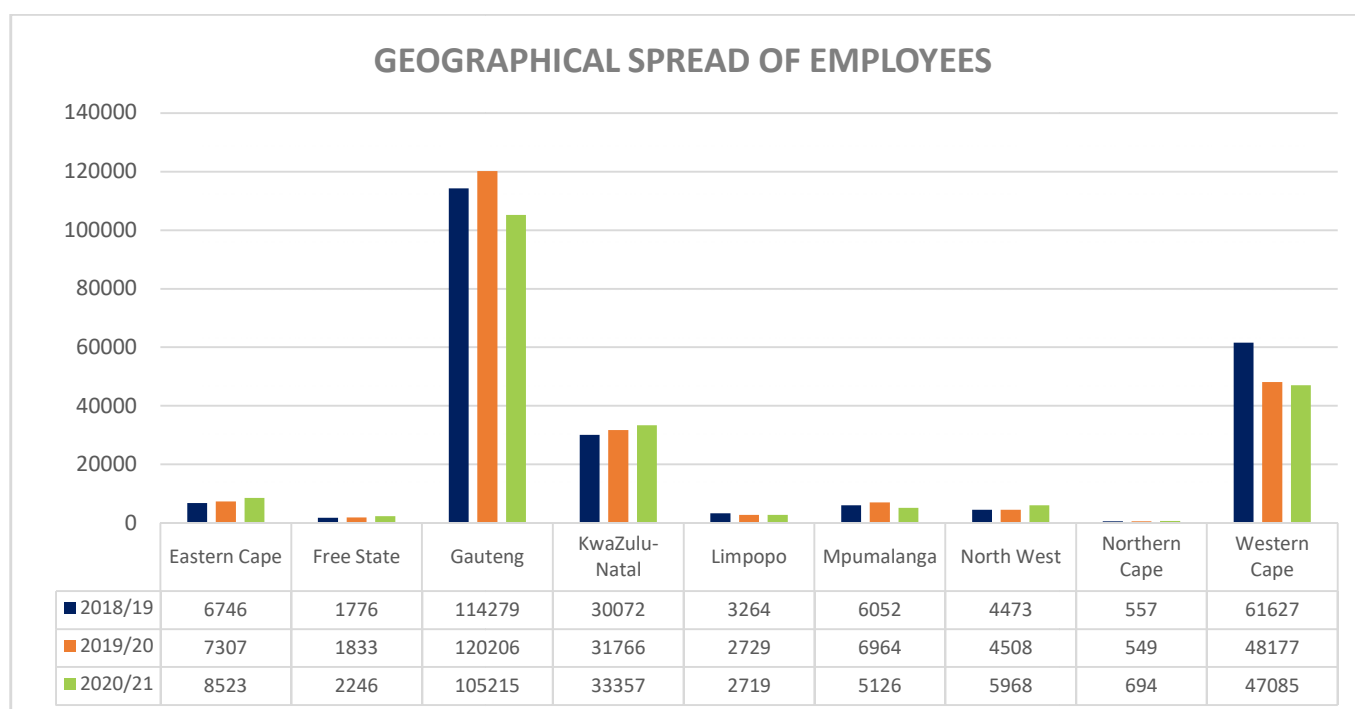
FIGURE 5: EMPLOYEES PER SUB-SECTOR



Source: CATHSSETA WSP data, 2020/21

The geographical spread of employees in the sector is shown in the figure below. The largest number of employees is in Gauteng (105 215), followed by Western Cape (44 378) and KwaZulu-Natal (33 357), which is in line with the distribution of entities. Employee distribution has decreased across the majority of provinces.

FIGURE 6: EMPLOYEES IN THE SECTOR PER PROVINCE



Source: CATHSSETA WSP data, 2020/21

The figures below outline gender and race demographics of the sector by occupational category. Females make up 57% of employees in the sector, 46% of which are African females. Majority of employees fall into the Service and Sales occupational category (35%), followed by Elementary workers (20%) and Clerical Support workers (15%). An analysis of employees based on these demographic variables by sub-sector, indicates the following:

Arts, culture and heritage: Female employees represent 50% of the sub-sector. The majority of employees (25%), occupies Service and Sales positions, followed by 17% in Technical and Associate Professional positions. 67% of employees in the sub-sector are African, followed by 20% White employees;

Conservation: Females account for 62% of employees in the sub-sector. The majority of employees (43%), occupy professional positions, followed by employees in elementary occupations (24%). 81% of employees in the sub-sector are African, followed by 10% Coloured employees;

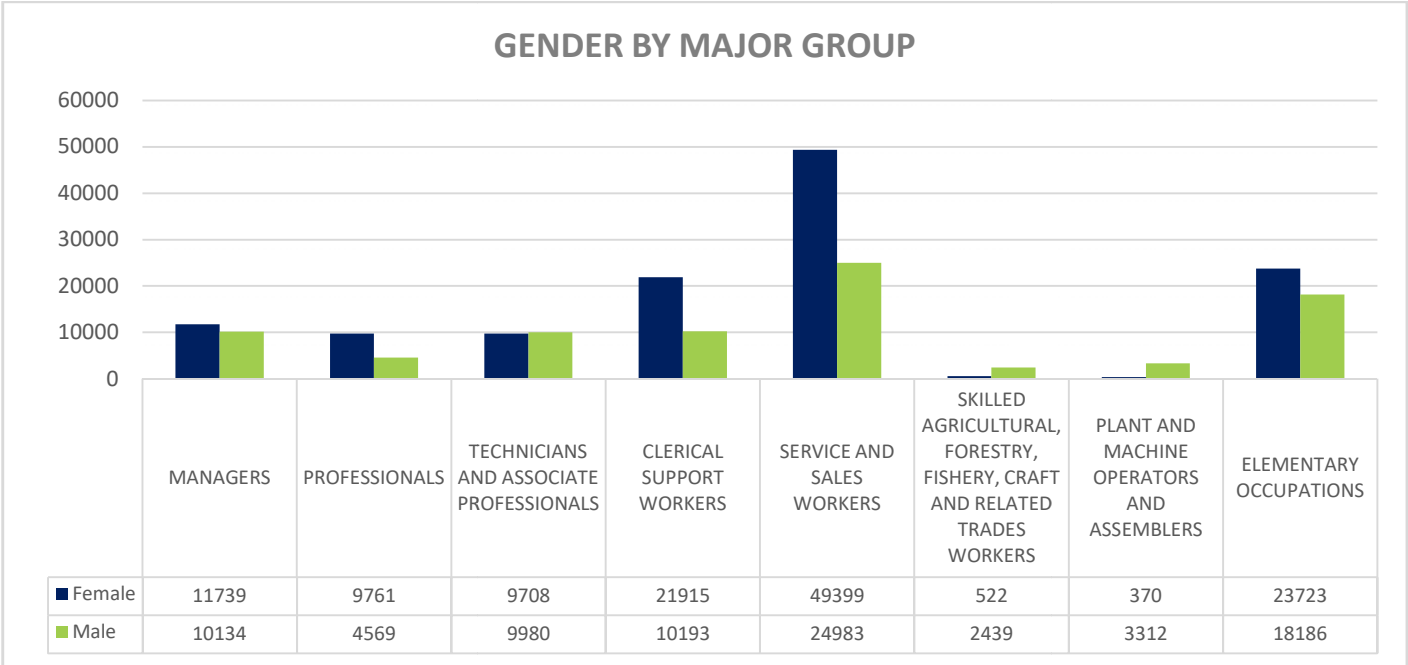
Gaming and Lotteries: The sub-sector employs 59% females. The majority of employees (43%) work as Clerical Support workers, followed by Service and Sales workers (24%). 73% of employees are African, followed by 7% Coloured employees;

Hospitality: The majority of employees in this sub-sector are female (62%). Service and Sales Workers (47%) account for the highest proportion of employees in the sub-sector, followed by Elementary workers (25%). The majority of employees are characterised as African, followed by 12% Coloured employees.

Sports, Recreation and Fitness: There is a relatively equal split between male (52%) and female (48%) employees in the sub-sector. The majority of employees are Technicians and Associate Professionals (28%), followed by 22% Clerical Support Workers. Africans account for 67% of employees, followed by White employees at 16%; and

Travel and Tourism: The majority of employees in this sub-sector (60%), are female. Clerical Support workers account for the highest proportion of employees (39%), followed by Managers at 15%. In terms of equity, 53% of employees are African, followed by White employees (26%).

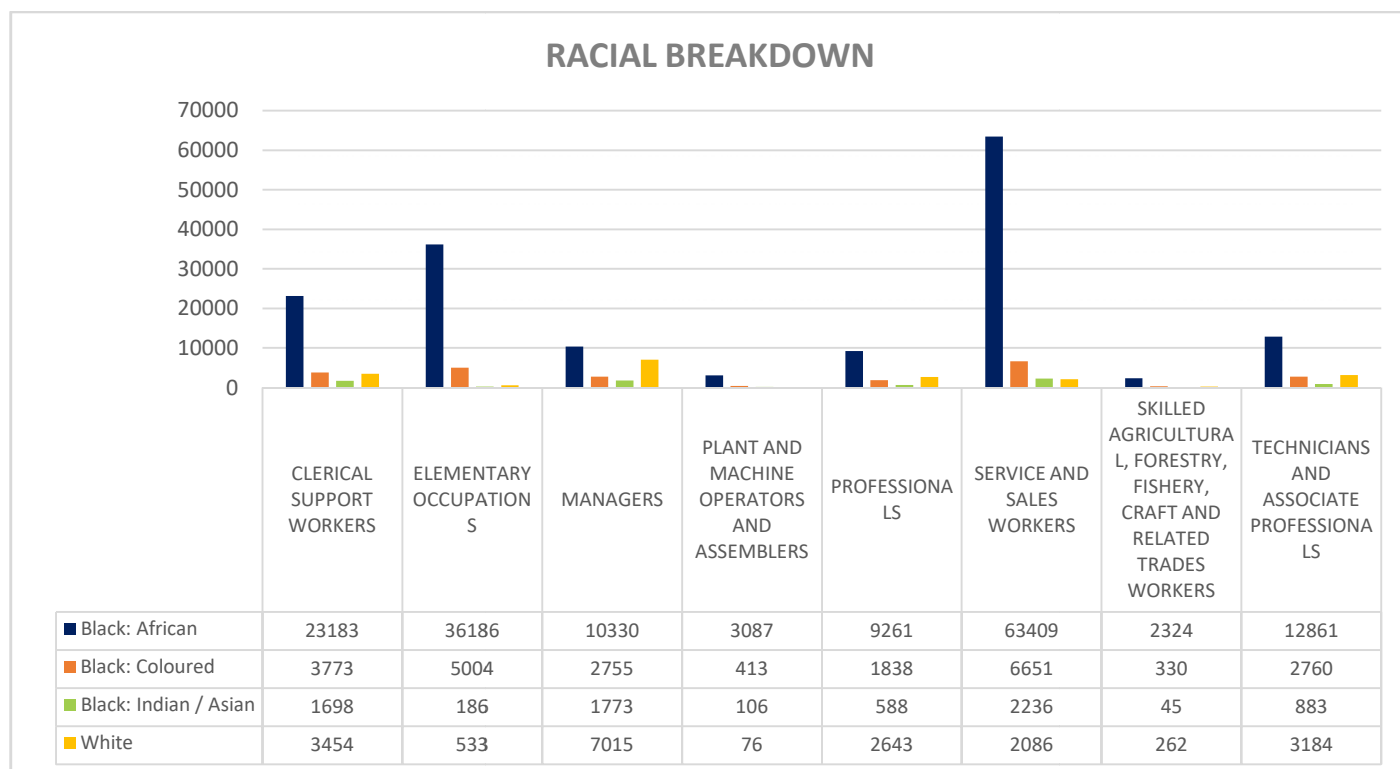
FIGURE 7: GENDER DEMOGRAPHICS OF EMPLOYEES PER MAJOR OFO GROUP



Source:CATHSSETA WSP data2020/21

The race demographics of the sector are presented per sub-sector in the figure below. Similar to previous years, the majority of employees are African (76%), followed by Coloured employees (11%), White (9%) and Indian/Asian (4%).

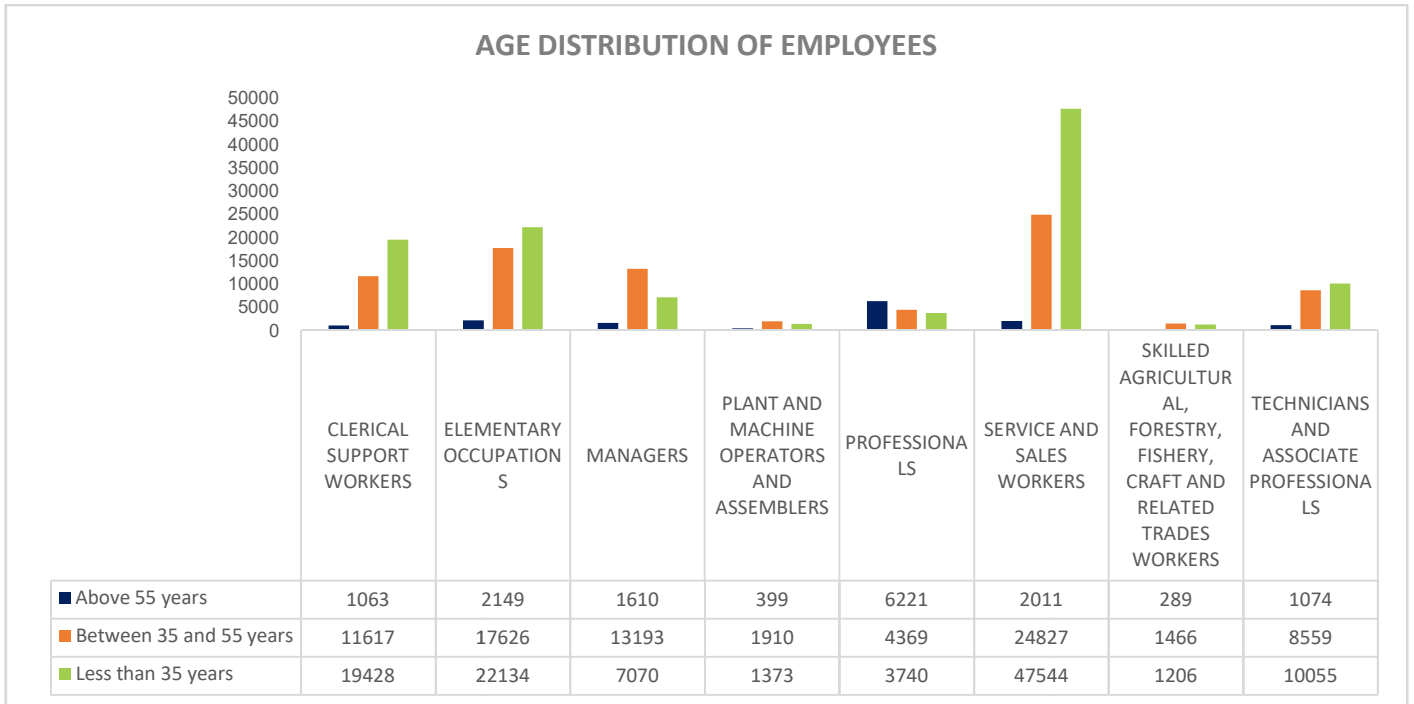
FIGURE 8: RACE DEMOGRAPHICS OF EMPLOYEES PER MAJOR OFO GROUP



Source: CATHSSETA WSP data 2020/21

The age distribution of employees outlined in the figure below illustrates that the majority of employees in the sector (53%) are classified as youth (less than 35 years). This is followed by 40% of employees between 35 and 55 years, and 7% above 55 years. The majority of youth (42%) and employees between 35 and 55 years (30%) occupy Service and Sales positions.

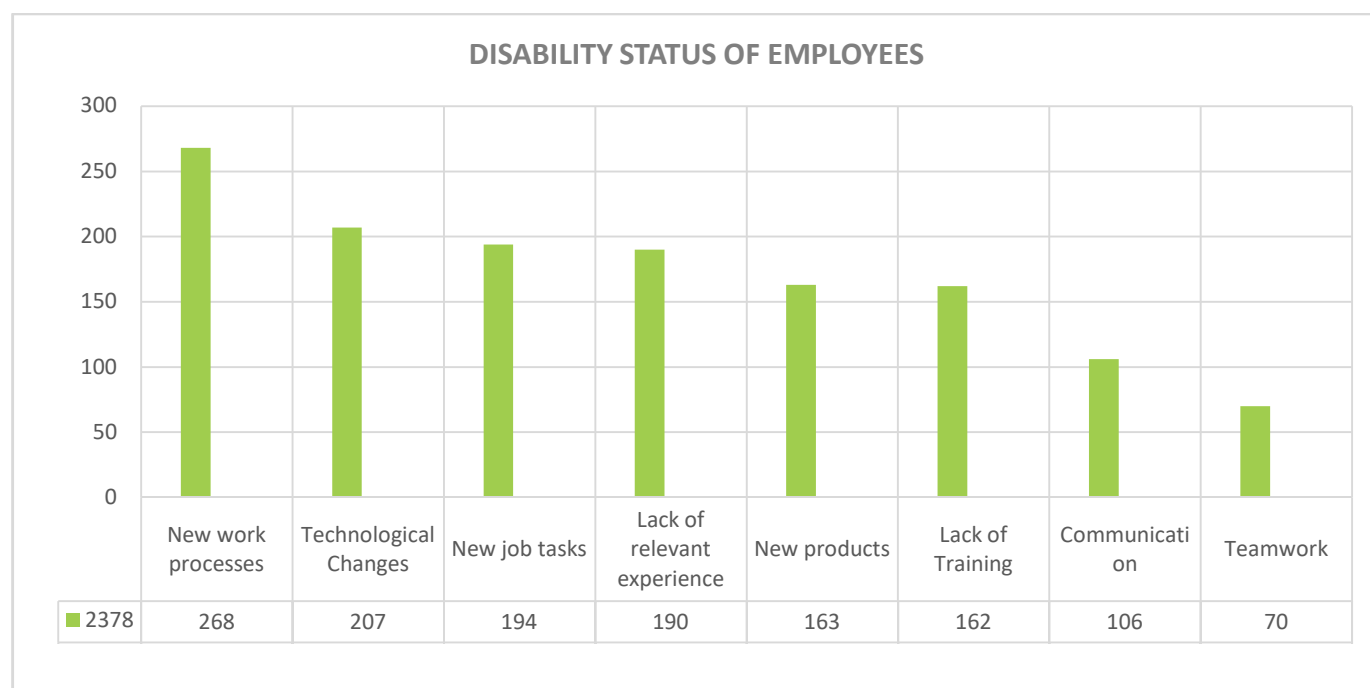
FIGURE 9: AGE DEMOGRAPHICS



Source: CATHSSETA WSP data 2020/21

The figure below outlines the number of people with disabilities in the sector. The percentage was calculated relative to the total number of employees in the sector. Overall, the number of people with disabilities employed, has increased from 1 147 in the previous year, to 4 447, representing 2% of overall employment in the sector. Consistent with the results of overall employment in the sector, the majority of people with disabilities (1%) occupies Service and Sales positions. The Hospitality sub-sector employs the vast majority of people with disabilities (80%). The Arts, Culture and Heritage sub-sector employs the least number of people with disabilities.

FIGURE 10: DISABILITY STATUS OF EMPLOYEES WITHIN THE SECTOR



Source: CATHSSETA WSP data, 2020/21

1.8. IMPLICATIONS FOR SKILLS PLANNING

COVID-19 has affected the economic performance of the sector. Further research needs to be carried out, on the overall impact of COVID-19 on the sector, and its implications on skills development. The composition of the sector shows that the vast majority of entities (95%) are small (0-49), indicating a need for continued support and the need to prioritise SMME development in the sector. Significant strides have been made towards greater representation and overall transformation in the sector. However, whilst 76% of employees in the sector are African, 46% of whom are African females, the vast majority is employed as Service and Sales workers, illustrating the need for further education and training in order to respond to transformational issues. In addition, 54% of employees are classified as youth (less than 35); indicating that the SETA needs to prioritise and support youth development in the various sub-sectors. Lastly, the number of people with disabilities has increased to 2% during the current year. However, Hospitality accounts for 80% of the 2%, illustrating the need for greater transformation in the other sub-sectors.

1.9. CONCLUSION

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

CHAPTER 2: KEY SKILLS ISSUES

2.1 INTRODUCTION

The aim of the chapter is to identify the skills change drivers and national policies that may impact skills demand and supply. A change driver is a factor that changes the sector and causes it to develop in a certain way. An analysis and implications in terms of skills planning are discussed in relation to interventions offered by SETA. Data sources used include Mandatory Grant applications, stakeholder consultation sessions and literature review.

2.2 FACTORS AFFECTING SKILLS DEMAND AND SUPPLY

CATHSSETA has identified change drivers within its six sub-sectors which are related to the way in which work is carried out in the said sub-sectors. The identified change drivers are as follows: the COVID-19 pandemic, the Fourth Industrial Revolution (4IR), Globalisation, Technology and the Green Economy.

2.2.1 COVID-19 Pandemic

The World Health Organisation (WHO) declared COVID-19 a global health crisis in March 2020. The pandemic has led to a series of lockdown restrictions. As has occurred with the other sectors of the economy, CATHSSETA sub-sectors have been impacted by the national lockdown and international travel restrictions. The primary focus for government and businesses is the safety of the population. The Department of Employment and Labour subsequently issued formal directives and regulations requiring Employers to provide and maintain a working environment that is safe and without risks to the health of its employees. Part of the directives include social distancing in the workplace, which requires employers to put measures in place to eliminate or mitigate the hazard or potential hazard of contracting COVID-19 or spreading COVID-19.

In the Arts, Culture and Heritage sub-sector, theatre productions and live events have been cancelled due to lockdown restrictions. The crisis further threatens the survival of local firms and workers in the cultural and creative production space. The Department of Sports, Arts and Culture allocated a budget of R150 million to provide relief to practitioners in the Sector. In Conservation, the hunting industry has had to cancel and postponed major hunting trips and events. This has had an impact both on the economic performance of the sub-sector, and on Wildlife Conservation, as trophy hunting currently contributes more to Wildlife Conservation in South Africa than any of the other conservation fees.

Similarly, the Sport, Recreation and Fitness sub-sector has been severely impacted by national lockdown restrictions. Under lockdown restrictions, all sporting events have had to be suspended or cancelled, and there is growing concern that the industry and its employees may struggle to recover, even after the Lockdown. The Travel and Tourism sub-sector is one of the worst affected industries globally. As a result, COVID-19 is causing a slowdown in both domestic and international travel, and changing tourist flows. This has multiplier effects on the performance of other CATHSSETA sub-sectors. It is projected that, even once the outbreak is over it could take up to 10 months for the Travel and Tourism sub-sector to recover from the impact of the pandemic. The domestic tourism season had been projected to resume in December 2020, whilst it's expected that international tourism would resume between January and February 2021.

Hospitality was greatly affected in the middle of what is considered “high season”. With the exception of some catering for essential workers, and quarantine facilities, the Hospitality industry was also brought to a halt. As a result, employees had to be temporarily laid off and working hours were decreased. In the Gaming and Lotteries sub-sector, horse racing and sports events have been cancelled or postponed indefinitely since the Corona virus outbreak, and other gambling establishments have been closed until further notice. The global suspension of most sporting events has left punters without live games to bet on, aside from reruns of filmed matches. The knock-on effect is that sports betting, which accounts for most Industry revenue, has crashed to almost nil (I-Gaming Business, 2020).

2.2.2 Fourth Industrial Revolution (4IR)

4IR represents a fundamental change in the way in which people live and work. These advances in human development are merging the physical, digital and biological worlds in ways that create huge potential for the sector. In the context of skills development, South Africa has an opportunity to reshape the composition of the sector by leveraging opportunities presented by 4IR to develop what has previously been deemed low-end skills to match the demands of 4IR. Indications are that the 4IR requires high-end skills in data management and computer-programming, and would drive a reduction in low-skills jobs or repetitive tasks (SSP Stakeholder consultations, 2019).

In the Travel and Tourism and Hospitality sub-sectors, technological advances have resulted in the use of Electronic Tourist passes, Global IT booking systems, accommodation booking sites and applications, such as: Trivago, Airbnb, Trip Advisor, etc. The Travel and Tourism industry has seen the use of remote access technology for Tourist Guides to easily access information on key points of interest as well as 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 advances in gym equipment, fitness and health mobile applications, electronic media, and even in the manner in which sports events are covered. Wearable technology is becoming ingrained in professional sports, allowing adverse metrics to be taken into account and utilised within training, thus permitting real-time decisions. The use of virtual fitness instructors within the field of recreation will likely see a decrease in the use of fitness instructors and fitness facilities. The implications of these technological advancements for the sport, recreation and fitness sub-sector, is that there will be a need for new skill sets for traditional occupations. 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 ICT strategies as well as plans to support traditional higher education curricula. In the Arts, Culture and Heritage industry there is movement towards the 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, YouTube channels and the emergence of apps, has threatened the sustainability of the music industry.

2.2.3 Technology

Information Technology (IT) has played an important role in all of the CATHSSETA sub-sectors in the last decade. Technology has helped reduce costs, enhance operational efficiency and improve services and customer experience. The Internet has an impact on all CATHSSETA sub-sectors. A customer's first experience with a business is via a visit to the website or social media page of the business in question. It is vital for a business to effectively utilise online advertising, social media and online purchasing to help convenience their customers across all CATHSSETA sub-sectors.

Recognition technology is already being used in some hotels to allow access to rooms via fingerprint recognition, or to allow for semi-contactless check-outs. However, in the future, it is hoped that this technology will allow customers to pay for meals in the hotel restaurant by means of walking through the exit scan. Virtual reality is also one of the most promising technological trends in the Travel and Tourism sub-sector, as it allows the digital transport of customers to a virtual recreation centre at a specific place. This also affords hotels the opportunity to showcase rooms, on their website, in an effort to encourage bookings.

COVID-19 has shown that technology is no longer a luxury, but an important component of the educational process. South Africa's post-education system is complex, with historical inequalities dating back to Apartheid. Most of the country's learners come from disadvantaged backgrounds and, as the COVID-19 crisis has shown, there's a huge digital divide to be considered. The need to do more with less is imperative for decision-makers in every economic sector and education and training is no exception. Considering the current lockdown restrictions, there is understandably an impact on planned skills development initiatives; classroom training is restricted, whilst workplace skills planning is set to resume, with restrictions, from the end of May 2020. BBBEE Strategies and aligned budgets are being discussed around the boardroom table (Biz Community, 2020). There will be a change and an increased demand for e-learning facilities.

CATHSSETA needs to take the time to frame an approach on e-learning for the sector and conceptualise an e-learning policy and framework for accreditation and implementation in the sector. However, the SETA does not have the privilege of months and years to formalise this learning approach. The SETA will need to move with speed and agility as demand increases. COVID-19 has shown that organisations in the ETD landscape will be forced to adapt. This is necessary both for economic sustainability and in order to unlock future entrepreneurs who will assist in economic stimulation (Biz Community, 2020). Overall, the complexity of implementing e-learning requires additional research. This will assist the SETA in the design and identification of conditions and practices in which e-learning can be used effectively in the PSET system. Such research will help inform which of the technology requirements need to be considered, which subject domains are possible for e-learning, the role of lecturers, what assessment approaches would work best for the sector, and industry best practices.

2.2.4 Globalisation

Globalisation has facilitated the emergence of a more 'sophisticated tourism market', which has implications for skills and training. A more discerning and experienced consumer demands higher quality products and services, increasing the demand for customer service skills, amongst others. In terms of providing a better service to international visitors, skills needing improvement include the ability to be able to communicate clearly in simple English, and cultural awareness. In addition, language training in Mandarin, Japanese, Spanish and German has been recognised as vital to ensure service excellence when dealing with visitors from some of the country's source markets.

The music, film, television, live events and technical production industries are evolving and changing fast in order to adapt to new occupational patterns and skills demands. These changes are brought about by fast-changing market conditions, competition, economic restructuring, advancing technologies and process and product improvements.

2.2.5 Green Economy

There have 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 a more environmentally-sustainable, climate change resilient country, and will become a low-carbon economy and just society (NDP, 2012). South Africa is well-known for its rich biodiversity and abundant wildlife; but climate change poses a risk to these natural treasures, as well as to the people of the country.

The country depends on healthy ecosystems for economic and livelihood activities, including tourism, and a number of income-generating and subsistence-level activities (SANBI, 2013). The MTSF focuses on the implementation of, and 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, reduced carbon emissions and helped in public education (MTSF, 2014). In addition, there are substantial job creation opportunities in programmes contributing to biodiversity conservation. CATHSSETA can contribute to the Green Economy by focusing on environmental science training interventions to produce Environmental Scientists, Plant Engineers, Sustainability Managers, Industrial Efficiency Managers, and Environmental Sustainability/Energy Consultants (SSP Consultation Sessions, 2019). These are some of the substantial occupations supporting the Green Economy.

2.3 IMPLICATIONS FOR SKILLS PLANNING IN THE SECTOR

Digital transformation has been accelerated massively due to the pandemic, and therefore equipping people with digital skills has suddenly become a critical need. E-learning has shown that it is possible for a country such as South Africa to deliver this form of learning, which is far cheaper and has potential for a wider reach than physical learning institutions. Therefore, ensuring that students have online access is essential.

There is the need to develop entrepreneurial, ICT and managerial skills across the sector, particularly amongst previously-disadvantaged groups, to enable transformation within the sector. The SETA, in partnership with sector stakeholders, needs to embark on career guidance initiatives, in order to ensure that the youth is guided to new and emerging careers in the sector. Short courses also need to be recognised as legitimate forms of learning. Based on the factors outlined above and inputs from key stakeholder engagements, the following emerging occupations have been identified per sub-sector. The list will be reviewed subject to findings from the research on the 4IR.

TABLE 7: EMERGING OCCUPATIONS:

Sub-sector	Emerging Occupations
Arts, Culture and Heritage	Audio-Visual 3D Technicians; Application Development Practitioners; Social Media Specialists; Heritage Multimedia Specialists; Repatriation Artists ;Marketing Practitioners; Digital Lighting Practitioners; On-Site Nurses; Digital Media Strategists; Information Technology Technicians; Information Technology Support.
Conservation	Chief Information Officers; Brownfield Redevelopers; Ecological Rehabilitation Professionals; Social Media Specialists; Business Development Specialists; Technologists; Environmental Scientists; Bio Technicians; Wildlife Ranchers; Animal Attendants; Biodiversity Planners; Conservation Scientists; Climate Awareness Educators; Environmental Disaster Responders; Green Marketers.
Gaming and Lotteries	Application Development Managers; Customer Relations; Data Analysts and Marketing Data Analysts; Social Media Specialists; Website Designers; Customer Relations Specialists; Industrial Psychologists; CCTV Technicians; Data Feeds Managers; Digital Artists; ICT Developers; Emergency Service and Rescue Officials.
Hospitality	Social Media Specialists; Dieticians; Operations Managers; Trends/Market Analysts; Health And Safety Auditors; Food Safety Assurance; Information Technology Specialists; Administrative Maintenance; Bar Managers; Food And Beverage Scientists; Online Bookings Specialists; Dieticians; Computer Network and Systems Engineers.
Sports, Recreation and Fitness	Risk Managers; Payroll Managers; Sports Psychologists; Sports Agents; Event And Project Management; Sports Lawyers; Media Coordinators; Fitness Management; Exercise Physiology, Disease Control Specialists.
Travel and Tourism	Business Development Managers, Guest Relations Officers; Communication Strategists; Legal Tourism Consultants; Marketing Practitioners; Travel Accommodation Inspectors; Travel Agency Managers; Business Analysts; Software Developers; Applications Developers.

Source: CATHSSETA Stakeholders consultations, 2019 - 2020

2.4 POLICY FRAMEWORKS AFFECTING SKILLS DEMAND AND SUPPLY

The next section outlines national strategies and plans relevant to CATHSSETA's sub-sectors, and details the alignment of these to skills planning within the SETA.

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 on the SETAs is proposed, limiting the scope of a SETA to the training of employees within the relevant sector and unemployed persons wishing to enter the sector. It is proposed that SETAs will provide supply-side data towards the development of a national skills planning system. The focus of the SETA Mandatory Grant will be exclusively on gathering accurate data on sector skills needs.

2.4.2. National Development Plan

In keeping with the vision of the NDP, and in order to promote the drive towards accredited training supported by grant regulations, 80% of all Discretionary Grants are spent on sectoral priority occupation 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 by employed people.

2.4.3. National Skills Development Plan (NSDP)

The aim of the NSDP is to ensure that the country has adequate and high quality skills that contribute towards economic growth, employment creation and social development. The Plan into effect from the 1st of April, 2020, and outlines key objectives for skills development. The Plan also provides performance indicators against which SETAs must performance against 2020 and beyond.

2.4.4. National Skills Accord

Since the inception of the National Skills Accord of 2011, and in response to it, 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.

2.4.5. 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 SIPs are presented by the DHET. CATHSSETA has identified the following four occupations, which will be addressed by supporting learners through WIL and internship programmes: Environmental Manager; Programme or Project Administrator's Assistant; Truck Driver and Handyman (persons).

2.4.6. New Growth Path

The Plan sets out key job drivers (areas that have the potential to create employment) and priority sectors which will receive focus over the next few years. Tourism is one such sector 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.

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

TABLE 8: SUB-SECTORAL STRATEGIES AND PLANS

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 management development programmes to assist in this drive to train leaders and managers.
Department of Arts and Culture Strategy 2012/13 (Mzansi Golden Economy)	<p>DAC and CATHSSETA have identified a need for the provision of a co-ordinated 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.</p> <p>The heritage sector requires the development of skills for the conservation and protection of heritage estates and assets, as well as skills appertaining to 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, amongst other interventions.</p>
National Heritage and Cultural Tourism Strategy 2012	The strategy clearly illustrates the significant deficiencies of skills and qualifications available in heritage conservation and management. It 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 making a concerted effort to ensure the relevance of qualifications that cater for its sub-sectors. These efforts are also aimed at encompassing elements of tourism in order to deepen understanding of the relationship between the sectors of the Arts, Culture and Heritage, and the Tourism sector.
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 the 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 Skills Development initiatives.
National Climate Change Adaptation Strategy, 2019	<p>This strategy stipulates that government must ensure that a holistic understanding of climate change and related issues are included in all relevant aspects of formal education curricula.</p> <p>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, in order to encourage students and scholars to research and study climate change. The role that CATHSSETA can play is in the</p>

TABLE 8: SUB-SECTORAL STRATEGIES AND PLANS

National Plans or Strategies	Implications for Skills Planning
	development and review of relevant qualifications, as well as in the funding of post-graduate scholars who will conduct research into the sub-sector.
Department of Environmental Affairs Strategy, 2019	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 to develop training initiatives.
Hospitality	
National Development Plan 2030	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.
Immigrations Regulations Act of 2002	Amendments to the Immigrations Regulations Act of 2002 resulted in new visa regulations being implemented in 2015. This brought about the repeal of the quota for exceptional skills work permits and the introduction of the 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 who have the critical skills needed that are likely to advance national interests.
Sectoral Determination 14: Hospitality	Sectoral determination for the Hospitality sector requires that the minimum wage offered by employers with 10 or less employees, be R2959.35, and that, for employers with more than 10 employees, be R3298.52. For CATHSSETA, this translates into a need to ensure that funding criteria is in line with the Department of Labour in terms of 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. 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 within the NSDS III.

TABLE 8: SUB-SECTORAL STRATEGIES AND PLANS

National Plans or Strategies	Implications for Skills Planning
Sport, Recreation and Fitness	
National Sport and Recreation Plan (NSRP), 2012	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 educational 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 national federations, and also on the training of coach-developers as facilitators, assessors and moderators.
Sports Tourism Strategy	The aim is to broaden capacity-building initiatives within the sports industry to encompass elements of Tourism, so as to deepen the understanding of the Sports Tourism element in sports development. CATHSSETA will work with its partners, such as the 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 will ensure that these volunteers are trained for the success of international sporting events in South Africa.
Travel and Tourism	
National Tourism Sector Strategy, 2020	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 to offer training programmes that are aligned to the needs of the sector, with the emphasis being on developing and improving skills within the sector.
Tourism Human Resource Development Strategy (THRD) Strategy 2017- 2027	The THRD Strategy is aligned to both the National Tourism Sector Strategy 2020 (NTSS) and to the 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 the strengthening of "soft skills", in collaboration with other actors, such as Umalusi, TVET Colleges and others.
National Rural Tourism Strategy, 2012	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 for rural development

TABLE 8: SUB-SECTORAL STRATEGIES AND PLANS

National Plans or Strategies	Implications for Skills Planning
	initiatives, through special projects, as well as extending its operational presence across the various regions.
Tourism Act, 2014	The Act regulates the Tourist Guide profession, and acknowledges the value and importance of the Tourist Guide 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 Guide sector. CATHSSETA can also assist with the development of Curricula and the implementation of RPL pilot projects, especially on Tourist Guides, as outlined by the THRD Strategy.

2.5 CONCLUSION

This chapter has identified factors that are driving change in the sector, such as the COVID-19 pandemic, 4IR, Globalisation, and the Green Economy, and the influence which these have on skills demand and supply. Changes in occupational patterns and structures are reflected in the profile of the skills that are required by employers in the sector. This reveals a need for human resources with increased proficiency in the use of technology, and greater cross-cutting industry skills and knowledge. The 4IR 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.

CHAPTER 3: OCCUPATIONAL SHORTAGES AND SKILLS GAPS

3.1. INTRODUCTION

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

- Occupational shortages and skills gaps;
- Extent and nature of supply; and
- Sectoral Priority Occupations and Interventions list (previously 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 DHET, 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, number of enrolments and graduations, as well as other supply-side information. Qualitative methods employed include focus group sessions, consultative sessions with industry stakeholders and key informant responses 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. SECTORAL OCCUPATIONAL DEMAND

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 to fill. The table below depicts the identified HTFVs by sub-sector. Not all sub-sectors had occupations vacant for longer than a year, as a result the list is extended to include occupations vacant for a period of 6 months to a year. The HTFVs listed are classified from 1 to 3 according to degree of scarcity, by employers who submitted the information.

TABLE 9: HARD-TO-FILL-VACANCIES (HTFVS) PER SUB-SECTOR

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Arts, culture, and heritage	2019-333903	Sales Representative (Business Services)	2	Lack of candidates with the required work experience
	2019-121905	Programme or Project Manager	2	Lack of suitably-qualified candidates
	2019-132401	Supply and Distribution Manager	2	Salary considerations
	2019-511301	Gallery or Museum Guide	2	Qualification required
	2019-652302	Fitter and Turner	12	Salary considerations Geographical location of the position is not favourable/remote

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Conservation	2019-213307	Park Ranger	6	Lack of candidates with the required work experience
	2019-121206	Health and Safety Manager	2	Lack of suitably-qualified candidates
	2019-513101	Sommelier	2	Lack of candidates with the required work experience
				Geographical location of the position is not favourable/remote
	2019-342302	Outdoor Adventure Guide	2	Lack of suitably-qualified candidates
	2019-211205	Climate Change Scientist	2	Lack of candidates with the required work experience
	2019-141101	Lodge Manager	2	Lack of candidates with the required work experience
	2019-242210	Business Administrator	11	Lack of candidates with the required work experience

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Gaming and Lotteries	2019-541402	Alarm\Security or Surveillance Monitor	34	High staff turnover
				Geographical location of the position is not favourable/remote
	2019-421202	Casino / Gaming Dealer	265	High staff turnover
				Geographical location of the position is not favourable/remote
	2019-143102	Gaming Manager	12	Lack of candidates with the required work experience
	2019-242211	Internal Auditor	13	High staff turnover
				Lack of candidates with the required work experience
	2019-143101	Racing Betting Branch Manager	10	Lack of candidates with the required work experience
	2019-541902	Emergency Service and Rescue Official	5	High staff turnover

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Hospitality	2019-811201	Commercial Cleaner	8	Lack of candidates with the required work experience
				High staff turnover
	2019-343401	Chef	98	Lack of candidates with the required work experience
				High staff turnover
				Geographical location of the position is not favourable/remote
	2019-422206	Call or Contact Centre Agent	6	High staff turnover
	2019-141201	Café (Licensed) or Restaurant Manager	7	Lack of candidates with the required work experience
	2019-513202	Barista	6	Lack of suitably-qualified candidates
	2019-252301	Computer Network and Systems Engineer	6	High staff turnover
	2019-515101	Hotel Service Manager	15	Lack of candidates with the required work experience
				High staff turnover
	2019-243204	Event Producer	20	High staff turnover
	2019-732101-1	Fast Food Delivery Driver	50	Lack of suitably-qualified candidates
	2019-134915	Non-Manufacturing Operations Manager	7	High staff turnover
				Lack of candidates with the required work experience
	2019-513101	Waiter	14	Lack of suitably-qualified candidates
				High staff turnover

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Sport, recreation and fitness	2019-342204	Football Coach	3	Lack of suitably-qualified candidates
	2019-342301	Fitness Instructor	50	Lack of suitably-qualified candidates
	2019-143108	Indoor Sports Centre Manager	2	Salary considerations
	2019-143108	Golf Course Manager	5	Lack of candidates with the required work experience
	2019-143107	Fitness Centre Manager	9	Lack of candidates with the required work experience
Travel and tourism	2019-122101	Business Development Manager	9	High staff turnover
	2019-251102	Data Scientist	2	Lack of suitably-qualified candidates
	2019-422102	Travel Consultant	44	Lack of candidates with required work experience
				Salary considerations
	2019-431101	Accounts Clerk	8	Lack of candidates with the required work experience

Source: CATHSSETA WSP data, 2020/21

Arts, Culture and Heritage: Currently, Fitter and Turners have been identified as occupations in highest demand in the sub-sector due to geographical location of the position and salary considerations; followed by Gallery or Museum Guides, Supply and Distribution Managers, Programme or Project Managers, and Sales Representatives.

Conservation: The highest number of vacancies in this sub-sector are those of Business Administrators and Park Rangers. This is due to the lack of work experience, followed by Health and Safety Managers, Waiters specialising as Sommeliers and Outdoor Adventure Guides, Climate Change Scientists and Lodge Managers.

Gaming and Lotteries: The sub-sector has the highest number of HTFVs in the area of Gaming Workers and Betting Agency Managers as a result of high staff turnover and the lack of work experience, respectively. This is followed by Racing Betting Branch Managers and Emergency Service and Rescue Officials.

Hospitality: Chefs, Delivery Drivers and Event Producers, have the highest degree of scarcity, largely due to the lack of suitably-qualified candidates, a lack of work experience and the geographical location of the organisation. Café (Licensed) or Restaurant Managers, Commercial Cleaners, Hotel Service Managers, Call or Contact Centre Agents, Baristas, Computer Network and Systems Engineers, Waiters and Non-manufacturing Operations Managers were also reported as HTFVs.

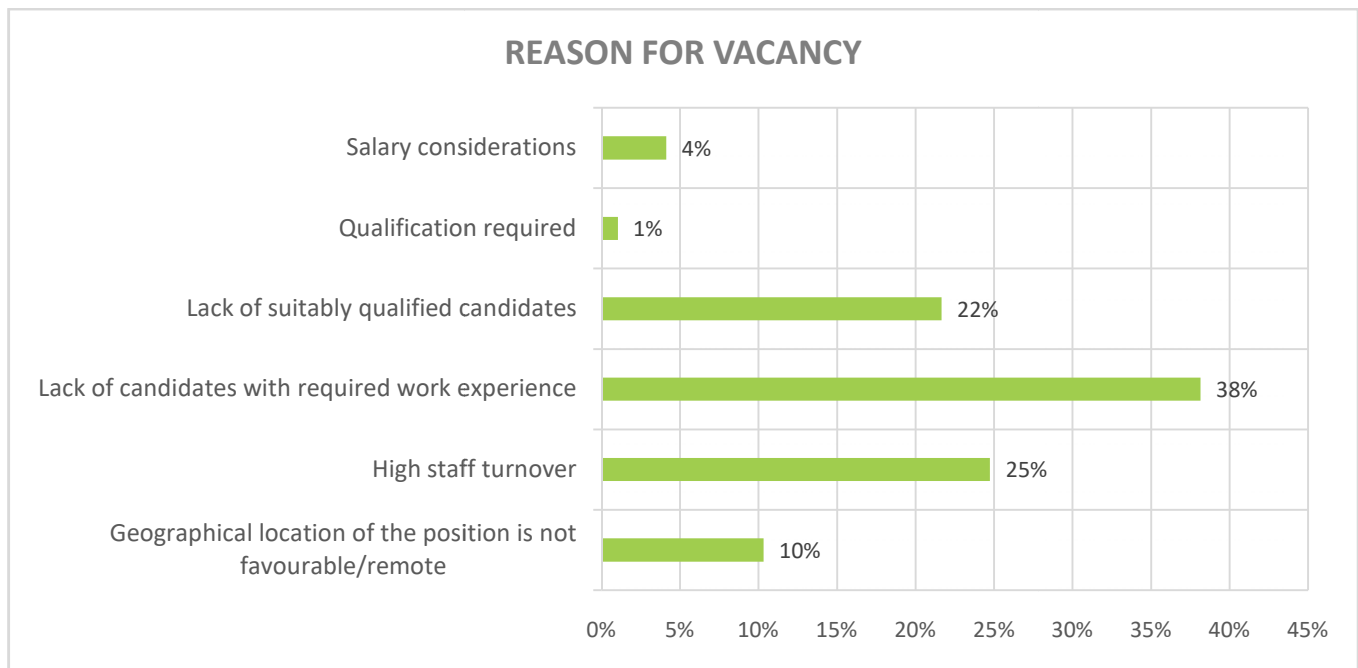
Sports, Recreation and Fitness: Has a shortage of Fitness Instructors and Fitness Centre Managers. This is largely due to lack of experience and the lack of suitably-qualified candidates. Sports Coach, Indoor Sports Centre Manager and Golf Course Manager were also identified as HTFVs.

Travel and Tourism: The sub-sector has a shortage of Travel Consultants due to lack of work experience and inadequate salaries. This is followed by Business Development Managers, Accounts Clerks as well as Data Scientists.

3.2.2. Reasons for Hard-to-Fill-Vacancies

The previous section detailed reasons vacancies remain unfilled for lengthy periods per sub-sector. Figure 12 below, indicates the sector's overall reasons for hard-to-fill occupations.

FIGURE 11: REASONS FOR VACANCY



Source: CATHSSETA WSP data, 2020/21

38% of employers indicated that the main reason vacancies are difficult to fill is due to a lack of candidates with the requisite experience. This is particularly the case in the Conservation, Gaming and Lotteries, Hospitality, and Travel and Tourism sub-sectors. This is followed by higher staff turnover rate, as the second reason vacancies are hard to fill. Thirdly, 22% of employers rated “lack of suitably qualified candidates as a reason for inability to fill vacancies.

3.2.3. Skills Gaps at Major OFO Group Level

Skills gaps refer to specific key or generic and ‘top-up’ skills which an employee requires to carry out tasks competently. Key or generic skills include cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, ICT skills and skills that have to do with working in teams. Occupationally-speaking, specific ‘top-up’ skills are those required for performance within that occupation in order to fill a ‘skills gap’ that might have arisen as a result of a changing technology or the introduction of new forms of technology. The most common skills gaps are indicated for each OFO major Group Level in table 9.

TABLE 10: SKILLS GAPS PER MAJOR OFO GROUP LEVEL

Major Occupations	Top 3 Most Common Skills Gaps	Number of Skills Gaps
Managers	New work processes	339
	Technological changes	230
	New job tasks	248
Professionals	New work processes	248
	Technological changes	223
	Lack of relevant experience	181
Technicians and Associate Professionals	New work processes	268
	Technological changes	207
	New job tasks	194
Clerical Support Workers	New work processes	285
	New job tasks	230
	Technological changes	220
Service and Sales Workers	New work processes	288
	Lack of relevant experience	206
	New job tasks	202
Skilled Agricultural, Forestry, Fishery, Craft and related	New work processes	186
	Technological changes	172
	Lack of relevant experience	145
Plant and Machine Operators and Assemblers	New work processes	165
	Technological changes	129
	Lack of training	119
Elementary Occupations	New work processes	289
	New job tasks	226
	Lack of training	215

Source: CATHSSETA WSP data, 2020/21

Based on the Mandatory Grant data, the most common skills gaps across the majority of occupational groups is: knowledge on new work processes; new job tasks; and technological changes. Stakeholder consultations need to be held to establish the reasons behind the selected skills gaps. However, the identified skills gaps do point to technological advancements and changes, which demand that both employers and employees keep abreast of new developments in the sector.

3.3. EXTENT AND NATURE OF SUPPLY

In order to determine skills supply 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, below.

TABLE 11: EDUCATION PROFILE OF EMPLOYEES PER SUB-SECTOR			
Sub-sector	Educational level	Employees	Percentage
Arts, Culture and Heritage	AET	3	0.1%
	NQF 1	89	4%
	NQF2, 3	68	3%
	NQF4	1 411	64%
	NQF 5, 6	273	12%
	NQF7,8,9,10	363	17%
	Total	2 207	
Conservation	AET	98	1%
	NQF 1	6 873	39%
	NQF 2, 3	955	5%
	NQF 4	3 291	18%
	NQF 5, 6	5 494	31%
	NQF 7, 8 , 9, 10	1 131	6%
	Total	17 842	
Gaming and Lotteries	AET	18	0.1%
	NQF 1	431	1%
	NQF 2, 3	1 484	5%
	NQF 4	22 580	76%

TABLE 11: EDUCATION PROFILE OF EMPLOYEES PER SUB-SECTOR

Sub-sector	Educational level	Employees	Percentage
	NQF 5, 6	3 794	13%
	NQF 7, 8 , 9, 10	1 389	5%
	Total	29 696	
Hospitality	AET	543	0.5%
	NQF 1	6 611	6%
	NQF 2, 3	12 002	10.1%
	NQF 4	82 158	69%
	NQF 5, 6	14 164	12%
	NQF 7, 8 , 9, 10	2 996	2%
	Total	118 474	
Sport, Recreation and Fitness	AET	108	1%
	NQF 1	614	4%
	NQF 2, 3	970	6%
	NQF 4	11866	75%
	NQF 5, 6	1 564	10%
	NQF 7, 8 , 9, 10	790	5%
	Total	15 912	
Tourism and Travel Services	AET	8	0.1%
	NQF 1	505	3%
	NQF 2, 3	632	4%
	NQF 4	9 114	57%
	NQF 5, 6	4 334	27%
	NQF 7, 8 , 9, 10	1 331	8%
	Total	15 924	

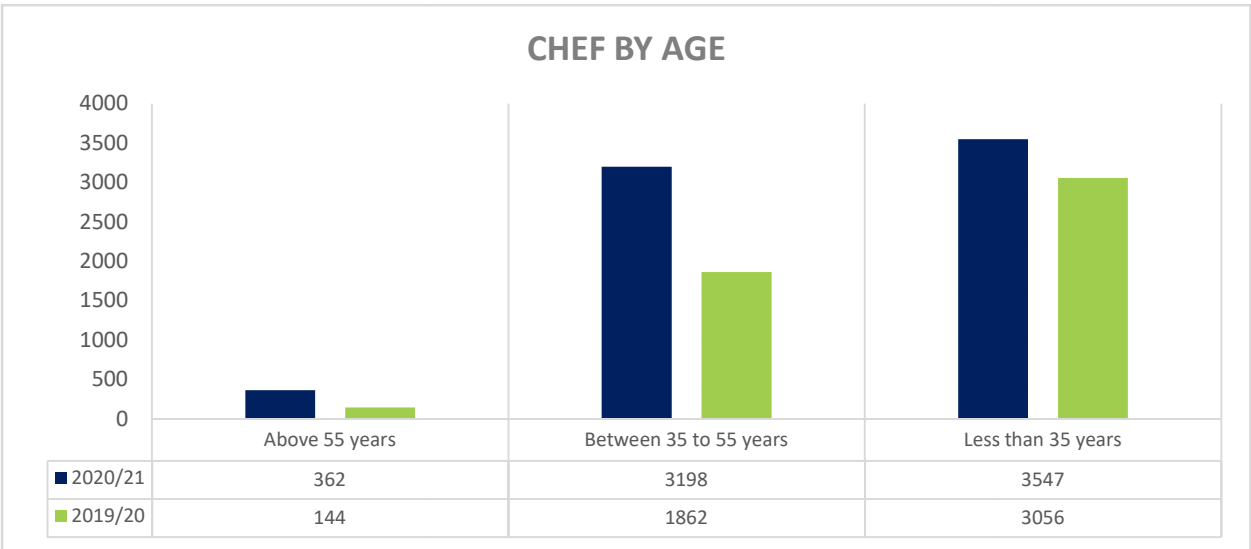
Source: CATHSSETA WSP data,2020/21

An analysis of the educational profile of the sector illustrates that the highest level of education for the majority of employees in the sector (65%) is NQF level 4 – which is the equivalent of a National Certificate/Matric. This is followed by employees within the middle level skills band i.e. NQF level 5 and 6, at 15%. The high occurrence of employees at the lower to middle level skills category is consistent with the types of positions that employees occupy in the sector, where the majority of employees fall into Elementary, Service and Sales, as well as Clerical Support to the OFO major groups.

Out of the six CATHSSETA sub-sectors, Conservation is the only sub-sector wherein the highest proportion of employees (39%) possess an NQF level 1 qualification. This is consistent with the overall employment profile of the sub-sector, where the majority of employees occupy elementary positions. While Conservation has the highest proportion of employees falling into the lower skills levels, the sub-sector also has the highest number of employees with a post-graduate qualification. The Arts, Culture and Heritage, Gaming and Lotteries, Sports, Recreation and Fitness, and Hospitality sub-sectors have the highest percentage of employees in the middle skills category.

Artisans within the CATHSSETA sector fall into a multitude of trades. Some of these include Chef, Butcher, Confectionery Baker, Tailor, Toolmaker and Welder trades. However, the only trade currently registered under CATHSSETA is that of Chef. An analysis of this occupation is illustrated in figures 13 and 14 below, which analyses the occupation according to age group, race and gender demographics.

FIGURE 12: DEMOGRAPHIC ANALYSIS OF THE CHEF TRADE BY AGE GROUP

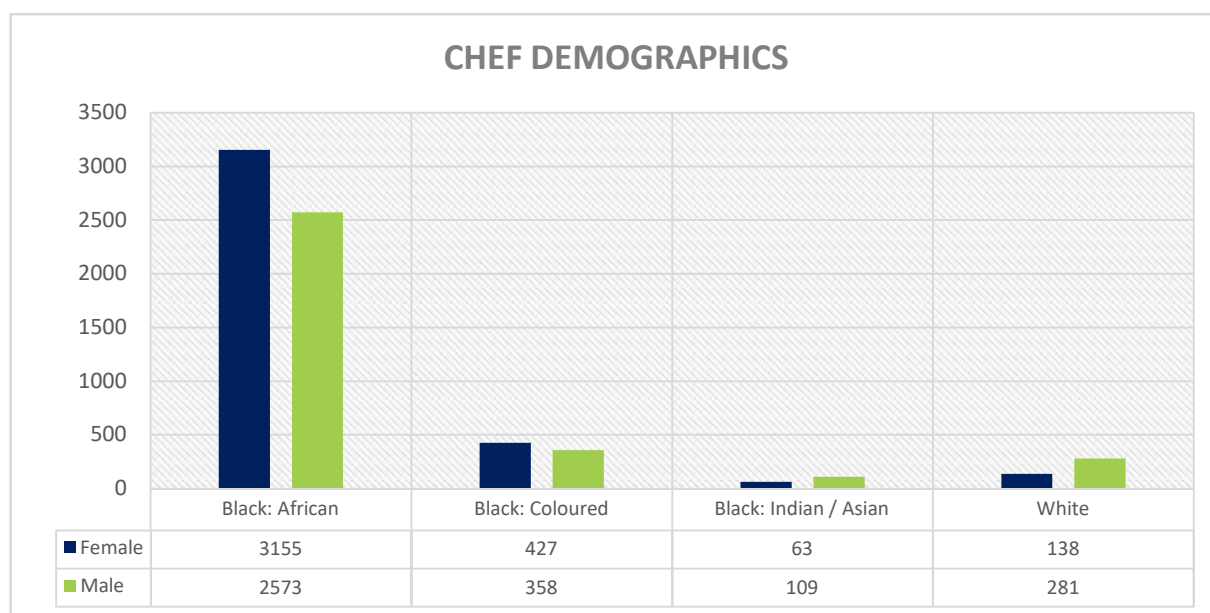


Source: CATHSSETA WSP data 2020/21

Based on Mandatory Grant data received from employers, the total number of Chefs employed in the sector has increased from 5 062, in 2019/20, to 7 107, in 2020/21. In previous years, the number of Chefs in the sector was decreasing, largely attributed to an ageing workforce, where a high proportion of Chefs were above the age of 55 years. Results from the current year illustrate that there has been a steady increase in the number of Chefs between 35 to 55 years compared to the previous years.

In terms of race and gender, there are no significant changes from the 2019/20 figures indicating 74% of Chefs in the sector as African. In the current year, 80% of Chefs in the sector are African, followed by 11% Coloured, 6% White, and 2% Indian/Asian.

FIGURE 1: DEMOGRAPHIC ANALYSIS OF THE CHEF TRADE BY RACE AND GENDER



Source: CATHSSETA WSP data 2020/21

3.3.2. State of Education and Training Provision

Higher Education Institution (HEI) data, sourced from DHET, was analysed for the 2018 and 2019 period. The 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, whilst Sport, Recreation and Movement, and Mind-Body Therapy account for the lowest number of enrolments and recorded graduates. Reasons could be increased tuition fees, the missing middle, alternative provisions or steep entry requirements. The table below presents the total number of enrolments and graduates in 2018 and 2019. Overall, data shows that there was over a 60% increase in the number of enrolments in 2019.

TABLE 12: HEI ENROLMENTS AND GRADUATIONS PER SUB-SECTOR PER QUALIFICATION AREA

Sub-sector	Qualifications*	NQF Levels	2018		2019	
			Total Enrolment	Total Graduates	Total Enrolment	Total Graduates
Arts, Culture and Heritage	Dance	5-10	828	92	297	73
	Design and Applied Arts	5-10	5 455	828	3 485	908
	Drama/Theatre Arts	5-10	3 338	545	2 882	606
	Film/Video and Photographic Arts	5-10	844	333	1 254	335
	Fine and Studio Art	5-10	7 101	844	3 895	710

TABLE 12: HEI ENROLMENTS AND GRADUATIONS PER SUB-SECTOR PER QUALIFICATION AREA						
Sub-sector	Qualifications*	NQF Levels	2018		2019	
			Total Enrolment	Total Graduates	Total Enrolment	Total Graduates
	Music	5-10	200	710	3 156	584
	Visual Performing and Arts, Other	5-10	57	20	32	15
Conservation	Botany/Plant Biology	5-10	997	432	2 230	481
	Zoology/Animal Biology	5-10	768	351	2 224	490
	Ecology, Evolution, Systematics and Population Biology	h5-10	1 625	411	1 746	549
Hospitality	Food Science and Technology	5-10	2 106	554	2 210	534
	Hospitality Administration/ Management	5-10	729	1656	8 645	1456
	Foods, Nutrition and Related Services	5-10	411	322	1 488	303
Sport, Recreation and Fitness	Parks, Recreation and Leisure Facilities Management	5-10	440	729	3 409	761
	Movement and Mind-Body Therapies and Education	5-10	329	166	46	6
Travel and Tourism	Business Administration, Management and Operations	5-10	18 813	16 681	87 379	18 266
	Entrepreneurial and Small Operations	5-10	1 565	592	3 392	577
			45 606	25 266	127 770	26 654

Source: DHET HEMIS data, 2019

Contrary to the increased number of enrolments, one of the biggest challenges to accessing higher education in South Africa is funding and high learner dropout rates. This is consistent with the results presented in the table above which illustrates that graduate figures are less than 50% of the enrolment rate.

TVET graduates in particular struggle to gain workplace-based experience and ultimately find employment post graduation. There is evidence of misalignment between course content and the skills needs of the industry. This is in part attributable to a limited or total lack of engagement. In order to align certain courses with current trends and industry developments, there is a growing need to revise the course content of certain Travel and Tourism, Hospitality and Conservation courses offered at TVET Colleges. For example, the effects of the 4IR and the emergent trends and occupations need to be taken into account. As a result, CATHSSETA needs to play a more active role in assisting the sector with aligning skills development institutions with current trends and future skills needs. (THRD, 2017). Another very important source of skills for the sector is industry itself, as in-house training and work-shadowing are both practical, job and workplace-specific, and combine training with work experience, which is considered important by employers.

The current Global Health challenge has catapulted e-learning as a necessary alternative to traditional forms of education. To mitigate the spread of the Corona virus in South Africa, the National COVID-19 Risk-Adjusted Strategy required all South African educational sites to temporarily close. E-learning has been introduced as a necessary alternative to reduce lost time during the academic year. As a result, higher education institutions have resorted to emergency remote teaching and learning programmes. The digital divide between students from different backgrounds cannot be denied and the ability for students to participate in this alternative is dependent on the learners' technological abilities and access to the necessary resources and connectivity. E-learning has however triggered innovative approaches to higher education provision, as universities continue to make efforts to keep academic programmes running.

The general challenges associated with skills development among time-constrained, owner-operated enterprises must be seen to apply to the sector as a whole, due to its overwhelming SMME profile. A defining feature of the tourism industry is that it comprises multiple small players, constituting about 94% of enterprises in the industry. This is a challenge in terms of addressing the Human Resource Development (HRD) needs of workers in the sub-sector and it's possible that this has also contributed to the poor HRD practices in the industry.

Training capacity in the Sports, Recreation and Fitness sub-sector is mainly provided by universities and universities of technology HEIs. While HEIs offer a variety of degrees and diplomas relevant to the SRF sub-sector, it must be noted, there are no accredited programmes in TVET Colleges relevant to

this sub-sector. Besides formal education institutions, accredited by the Council on Higher Education (CHE) and Umalusi, CATHSSETA has accredited private providers to offer SRF learning programmes. However, the need to increase the number of these providers remains, as there are very few accredited training providers, or none, in certain provinces. 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 exponentially in recent years, however graduates are generally viewed as not meeting employer expectations. The perception is that there is a mismatch between the skills and the academic knowledge of graduates exiting institutions, and the competencies required to 'get the job done'. In addition, they were of the view that there is a lack of clear learning pathways and articulation for TVET qualifications. 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 their qualifications and industry requirements, employers perceive graduates as being of little benefit to the workforce. They see 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, in order to enable graduates to gain the level of skills required in the industry. The need to intensify Internships in particular is supported by findings from the 2016 Impact Assessment Study which indicated that, of the learners surveyed, 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 (2016) found that, although there is a mismatch between industry needs and academic qualifications, most of the graduates interviewed had been employed. Of the graduates sampled in the Arts, Culture and Heritage sub-sector, 85% were employed, of which, 82% were employed in the relevant industry. However, employment tended to be on a freelance basis due to the part-time nature of the jobs in this sub-sector. The only full-time employment opportunities were 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 all sampled graduates secured employment related to their qualification. This sub-sector is dominated by volunteers and graduates competing for available job opportunities. Though the labour market has

recognised Sports, Fitness and Recreation as a career path, the prospects for young graduates remain grim. Due to their lack of experience, sport organisations do not recognise the potential of young graduates, as opposed to older people with experience in the industry, and there is 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 qualifications, curriculum and training providers, which take the form of TVET Colleges, 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. It includes more generic 'skills' underpinning a service ethic; skills required to manage individual tourism products and service enterprises, as well as the departments and agencies supporting such enterprises; skills required to communicate effectively, both verbally and non-verbally, across cultural and language divides; and various entrepreneurial and technical skills, such as cooking.

3.4. SECTORAL PRIORITY OCCUPATIONS AND INTERVENTIONS (PIVOTAL)

CATHSSETA utilises a combination of data and labour market signals to monitor and determine occupations that are hard to fill. These inform the priority skills, the occupations of which are listed in the Sectoral Priority Occupations, formerly known as Professional, Vocational, Training and Academic Learning (PIVOTAL) list in table 12 below, as approved by the CATHSSETA AA. Some of the data and signals used and observed were:

- All enterprises submitting Mandatory Grant applications (comprising 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; and
- The pool of unemployed skilled people.

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

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

All data and input is captured using the six-digit OFO codes. Occupational shortages are identified as a function of two variables: the total number of vacancies identified, and the degree of scarcity. Occupations were identified across all six sub-sectors within the CATHSSETA scope. Occupations that were deemed to support the Green economy and the 4IR were included in the list. The quantity of Sectoral Priority Occupations was determined by tracking and listing occupations identified in the 2018

and 2019 SSP, which were added to the occupations identified in the WSP, including HTFVs. The actual quantity per occupation of Sectoral Priority Occupations, was arrived at by deducting the total number of trained learners (as per the CATHSSETA Consolidated Scarce Skills Analysis Report 2019), from the 2019/20 SSP and WSP numbers. The various CATHSSETA management and AA structures were consulted, who approved the sectoral priority occupations. Occupations that reflected over-supply, and which had been on the list for the past 10 years, were removed. Occupations were further ranked according to demand per sub-sector, in order to determine the top 10 Sectoral Priority Occupations.

3.4.1 Sectoral Priority Occupations

TABLE 13: TOP 10 OCCUPATIONS ON THE SECTORAL PRIORITY OCCUPATIONS LIST

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
Arts and Culture	Managers	2019-264201	Copywriter	Publicity Writer, Copy Editor, Advertising Writer	Bursary and Internship	7	17
	Managers	2019-251301	Multimedia Specialist	Multimedia Programmer, Animation Programmer, Computer Games Programmer, Graphical Programmer, Digital Media Specialist, Multimedia Developer	Bursary: National Diploma - Sound Technology and Production	6	14
Conservation	Professionals	2019-213307	Park Ranger	Game/Park Warden, Beach and Estuary Warden, Fish Warden, Wildlife Officer/Warden, Wildlife Conservationist	Learnerships: National Certificate - Nature Resource Guardianships Terrestrial	5	320
	Managers	2019-134901	Environmental Manager	Land Care Manager, Wild Life Management Services Manager, Pollution and Waste Manager, Agriculture and Forestry Coordinator, Water Resource Manager, Environmental Health Manager, Contaminated Sites Manager, Centralised Permits and Cites Manager, Land and Water Manager, Species Protection Manager, Conservation Science Manager, Sanitation Programme Manager, Environmental Education Manager, Wild Life Protection Services Manager, Conservation Agriculture System Manager, Water Quality Manager	Bursary/Internships and Workplace Experience	6	123
Gaming and Lotteries	Clerical Support	2019-421202	Gaming Worker	Casino Gaming Inspector, Casino/Gaming Dealer, Gaming Pit Boss, Gaming Inspector, Casino Surveillance Operator, Gaming	Learnership: National Certificate Gaming	5	252

TABLE 13: TOP 10 OCCUPATIONS ON THE SECTORAL PRIORITY OCCUPATIONS LIST

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
	Workers			Operator, Croupier, Gaming Table Operator	Operations		
	Managers	2019-143101	Betting Agency Manager	Racing Betting Branch Manager, Tab Manager	Learnership: Generic Management	5	28
Hospitality	Managers	2019-141201	Café (Licensed) or Restaurant Manager	Bistro Manager, Internet Cafe Manager, Cafeteria Manager, Catering Manager, Food Services Manager, Caterer, Restaurateur, Mess Manager, Canteen Manager, Food and Beverage Manager	Bursary and Learnership: Food and Beverage Studies/Services	6	1311
	Technicians and Associate Professionals	2019-343401	Chef	Chef de Partie, Commis Chef, Head Chef, Pastry Chef, Demi Chef, Sous Chef, Saucier, Executive Chef, Second Chef	Apprenticeship/Learnership : National Certificate - Professional Cookery	5	1281
Sport, Recreation and Fitness	Technicians and Associate Professionals	2019-342301	Fitness Instructor	Physical Training Instructor, Aerobics Instructor, Physical Fitness Trainer, Health and Fitness Instructor, Aquarobics Instructor, Gym Instructor/Trainer, Gymnasium Attendant, Physical Education Officer, Physical Activity Coordinator, Fitness Centre Worker, Fitness Consultant/Trainer/Instructor, Personal Trainer	Skills Programme: Fitness Instructor	5	692

TABLE 13: TOP 10 OCCUPATIONS ON THE SECTORAL PRIORITY OCCUPATIONS LIST

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
Tourism and Travel Services	Managers	2019-422102	Travel Consultant	Inbound Tour Manager, Travel Agent Representative, Travel Consolidator, Booking Travel Clerk, Travel Reservation Clerk, Travel Officer, Travel Arrangements Manager, Travel Agent, Travel Clerk, International Travel Consultant, Domestic Travel Consultant, Travel Wholesaler	Learnership: National Certificate - General Travel	5	717

**Subject for review once SLA targets have been approved*

Source: CATHSSETA WSP data, 2020/21

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 falls within the low to middle level range of skills, which is typical of the services industry. The supply of skills, however, necessarily takes place 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. A Sectoral Priority Occupations list, identifying the top occupations that will be addressed, was presented.

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 key partnerships with:

- Public TVET Colleges;
- Higher Education Institutions and PSET institutions;
- Public entities;
- Co-operatives, NPOs and Community-based Organisations; and
- Large employers and Industry bodies within the sector.

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

4.2. ANALYSIS OF EXISTING SETA PARTNERSHIPS

The SETA's existing partnerships are arranged into four groups which are reflected in the subsequent sections.

4.2.1. State of Existing Partnerships

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

Technical Vocational Education and Training 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 so as 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. Partnerships with TVET Colleges resulted in CATHSSETA entering into an agreement with the Chinese Culture Centre to participate in the Chinese Culture Exchange Project, whereby 112 TVET learners who completed N6 were co-sponsored in an international Work-integrated Learning (WIL) programme.

TABLE 14: EXISTING PARTNERSHIP			
Name of institution/ Partner Organisation	Nature of Partnership)	Objectives of Partnership	Value of Partnership
Majuba TVET College	Funding support	Work-integrated Learning	Links learners to the workplace and assists them to complete their qualifications.
South West Gauteng TVET College	Funding support	Work-integrated Learning	Links learners to the workplace and assists them to complete their qualifications.
College of Cape Town	Funding support	Bursary funding	To increase throughput of students registered in high-demand occupations, to provide a supply pipeline for the economy and labour market, in response to the occupations in high demand list; and To provide under-privileged and qualifying students/learners who do not have the financial support, to access Higher Education Programmes. Financial support is offered through bursary programmes. As part of the bursary programme, CATHSSETA provides tuition fees, books and a stipend for learners.
King Hintsa TVET College	Funding support	Bursary funding	
KSD Colleges	Funding support	Bursary funding	
South West Gauteng TVET College	Funding support	Bursary funding	

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.

TABLE 15: EXISTING PARTNERSHIP			
Name of Institution/ Organisation	Nature of Partnership (Start &End Dates)	Objectives of Partnership	Value of Partnership
Motheo TVET	CATHSSETA Regional Office	Services Free State and Northern Cape	Partnerships put in place to provide CATHSSETA access to the TVET environment and serve as a provincial contact centre, whilst providing the TVET College learner with access to career guides provided by the SETA.
Lovedale TVET	CATHSSETA Regional Office	Services Eastern Cape	
Northlink TVET	CATHSSETA Regional Office	Services Western Cape	
eThekweni TVET college	CATHSSETA Regional Office	Services KwaZulu- Natal	

Further partnerships with TVET Colleges exist, as illustrated in table 15 below.

TABLE 16: ADDITIONAL TVET PARTNERSHIPS			
Name of Institution/Partner Organisation	Nature of Partnership	Start Date	Objectives of Partnership
Lovedale TVET College	WIL NCV	03/06/2019	Partnerships put in place to offer Vocational Courses and Work Experience to TVET College learners.
Ikhala TVET College	WIL N6	03/06/2019	
Thekwini TVET College	WIL NCV	01/07/ 2019	
Majuba TVET College	WIL N6	01/08/2019	
Maluti TVET College	WIL N6	01/07/2019	
King Hintsa TVET College	WIL NCV and N6	01/07/2019	
Northlink TVET College	Skills programme	21/06/2019	
Mopani TVET College	Skills programme	20/03/2020	
Nkangala TVET College	WIL N6	15/03/2020	
Motheo TVET College		08/01/2019	

Higher Education Institutions (HEIs) and Universities of Technology (UoTs): CATHSSETA has partnered with four Universities, table 16. CATHSSETA funds the bursaries, which cover the cost of tuition, books and accommodation with CATHSSETA, over a period of two years.

TABLE 17: EXISTING HEI PARTNERSHIPS			
Name of Institution/ Partner Organisation	Nature of Partnership (Start &End Dates)	Objectives of Partnership	Value of Partnership
University of the Free State	For funding Bursaries	Learner support	To increase throughput of students registered in High Demand Occupations, in order to provide a supply pipeline for the Economy and Labour Market, in response to the occupations in high demand list.
Central University of Technology	For funding Bursaries	Learner support	
Tshwane University of Technology	For funding Bursaries	Learner support	
Durban University of Technology	Funding HET Placements	Internship Programmes	

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); and

Travel and Tourism: the SETA currently has a partnership with the Department of Tourism which focuses on the National Tourism Careers Expo (NTCE), collaborating on a skills audit and 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.

CATHSSETA has signed Memorandum of Understandings (MOU) with a multiplicity of partners including government departments and institutions in the various sub-sectors as reflected in table 18.

TABLE 18: EXISTING PARTNERSHIP				
Name of Institution/ Partner Organisation	Nature of Partnership	(Start & End Dates)	Objectives of Partnership	Value of Partnership
Independent Development Trust		2019 - 2022	Infrastructure Project	To support two TVET Colleges, King Hintsa and King Sabata, TVET Colleges in the Eastern Cape, with infrastructure development.
FEDHASA		2019 -2023	Bursary funding	MoU to support worker-initiated training.
Chinese Culture and International Education Centre		2018 - 2020 2019 - 2021	WIL funding	Addressing Work-integrated Learning programme for TVET Colleges.
Department of Tourism	MoA formalising Partnerships and Training Interventions including National Tourism Career Expo	2019 – 2020	Focuses on the National Tourism Careers Expo (NTCE), collaborating on a Skills Audit and a service excellence training programme. To actively participate in any initiatives that are aimed at strengthening skills development in the tourism sector, as per the CATHSSETA mandate.	Enhancement of career guidance interventions. The NTCE flagship programme has been significant in terms of profiling tourism and its value chain products as employers of choice.
Inter-SETA		2019 - 2025	Bursary funding	MoU to support SMME and cooperative development.
North West Department of Sports, Arts and Culture	Support by mobilising stakeholders		Train 50 employees in FETC: Heritage Resource Management.	The partnerships reduce the cost of training, and more learners benefit.
Department of Public Works	Focus on Hospitality and Tourism, and Sports, Recreation		Train 1 037 learners in the Expanded Public Works Programme (EPWP).	To provide training and short-term employment, with stipend, to unemployed learners.

TABLE 18: EXISTING PARTNERSHIP

Name of Institution/ Partner Organisation	Nature of Partnership	(Start & End Dates)	Objectives of Partnership	Value of Partnership
Northern Cape Department of Sports, Arts and Culture	MoA formalising partnerships and training interventions		Sectoral Training Interventions within the province.	To support CATHSSETA in reaching rural communities.

The table below provides a breakdown of partnerships between DHET, SETAs, employers and private training providers.

TABLE 19: PARTNERSHIPS WITH DHET, SETAS, EMPLOYERS, AND PRIVATE TRAINING PROVIDERS

Name of Institution/ Partner Organisation	Nature of Partnership	Start &End Date	Objectives of Partnership
Natal Museum	Internship	03/06/2019 - 31/03/2020	SETAs identify employers within their sectors, put in place partnerships to offer work experience for college learners.
Golden Horse Casino	WIL TVET N6	15/06/2019 - 31/03/2020	
Avis Rent A Car	Bursary	03/06/2019 - 31/03/2020	
Summer Season 120	Apprenticeship	03/06/2019 - 30/03/2020	
Shishangeni Lodge	Internship	03/06/2019 - 31/03/2020	
Thebe Tourism Group	Internship	03/06/2019 - 31/03/2020	
Villa Bali Boutique	WIL TVET N6	03/06/2019 - 31/03/2020	
Emerald Safari Casino	WIL University	03/06/2019 - 31/03/2020	
Mabalingwe Country Club	Learnership employed	2019/08/01	
The Ridge Casino & Entertainment	Bursary employed	2019/08/01	
Ranch Hotel Pty Ltd	Learnership employed	2019/08/01	
Garden Route Casino	Learnership employed	2019/08/01	
RH HOTELS RIDGESIDE UMHLANGA PTY LTD t/a Holiday Inn Express	Bursary employed	2019/08/01	

TABLE 19: PARTNERSHIPS WITH DHET, SETAS, EMPLOYERS, AND PRIVATE TRAINING PROVIDERS

Name of Institution/ Partner Organisation	Nature of Partnership	Start &End Date	Objectives of Partnership
Umhlanga			
Peermont Global	Learnership unemployed	2019/08/01	
Tourvest Travel Services (PTY) LTD	WIL: TVET Placement	2019/08/01	
Premier International Hotels & Resorts (Pty) Ltd. T/A Premier Hotel Cape Manor	Learnership employed	2019/06/03	

4.2.2. Successful Partnerships

There have been partnerships which have resulted in successful outcomes produced in the following areas:

Training provision: Training, through partnerships with various stakeholders, which has been successfully completed:

- The partnership with Ezemvelo KZN Wildlife, which provided training addressing Customer Care to 623 employees at NQF level 4, and 20 employees at NQF level 5;
- The partnership with the National Arts Festival, which resulted in most of the 20 unemployed learners who completed the Sound Technology skills programme for the Music Industry, being employed in full-time positions; and
- 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 enable them 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: Several Masters and PhD learners have produced research that has contributed to improved sector intelligence. Thus far, 23 recipients of bursaries (17 at Masters' level and 6 at PhD level) have completed their studies.

Department of Tourism: CATHSSETA partnered with the Department of Tourism to undertake a skills

audit as part of the review of the THRD strategy. This 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. This has been completed and upgraded to NQF level 5. CATHSSETA is also working with the SA Chef Association in developing criteria and guidelines to assist training providers in terms of consistency with assessment, when developing the Trade Test.

In the pipeline is a review of eight qualifications with QCTO. Desktop research was done to identify these occupations on the basis of the occupations in high demand list. 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, to assess why Private Colleges have no learners registered in certain qualifications.

4.2.3. Problems Experienced with Partnerships

The main challenge which the SETA has faced in promoting research at Postgraduate Level is the inability of students to keep to agreed upon research areas of study. As a result, the delivery of findings to the SETA is delayed, which limits the usefulness of the findings, given the need for recent, up to date information.

Partnerships entered into for the development and review of qualifications have also presented some challenges. Due to the voluntary nature of participation by industry, the finalisation of qualifications poses a challenge due to a number of reasons, namely, setting aside time for assigned tasks, travel and logistics, as well as delays in the signing of contracts. Sub-sector buy-in and budget constraints also pose a challenge to the finalisation of partnerships.

Partnerships with public entities are unique. Certain public entities are often reluctant to fund projects, expecting 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 faces with TVET Colleges is lack of infrastructure geared towards responding to SETA requirements, for example, lack of capacity-enabling preparation of relevant documents for programme approval. Another challenge encountered during the implementation of the programme is delays in the recruitment of learners.

4.2.4. Strengthening of partnerships

In order to strengthen partnerships, it is imperative that the SETA maintains current partnerships through focused engagements, and a clear definition of roles and responsibilities.

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

In strengthening TVET College capacity and infrastructure, the SETA plans to continue to implement capacity-building projects and initiatives that include the strengthening of TVET College human resource capability, governance structures and infrastructure. CATHSSETA entered into a MOU with the South African College Principals Organisation (SACPO) to implement the TVET lecturer development programme. 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.

4.3. PLANNED PARTNERSHIPS

The SETA is looking at forming partnerships with these entities:

TABLE 20: PLANNED PARTNERSHIPS			
Name of Institution/ Partner Organisation	Nature of Partnership (Start & End Dates)	Objectives of Partnership	Value of Partnership
King Hintsa and King Sabata TVET Colleges	2019/20 Financial Year	To fund the building of an industrial kitchen for practical's by Hospitality students studying at the TVET.	Contributes to the acceleration of skills development in rural areas.
Organised Labour	Skills Needs Analysis and Training Interventions 2019/20 – 2020/21	To identify training needs, provide training and RPL.	Supports worker-initiated Training as per NSDP outcome.

New partnerships will include extending existing partnerships with institutions involved in Work-Integrated Learning programmes, strengthening skills development initiatives, youth and women empowerment.

TABLE 21: NEW PARTNERSHIPS

Name of Institution/ Partner Organisation	Gaps that the Partnership will be addressing	Objectives of the Partnership
Chinese Culture Centre	Work-integrated Learning programme for N6 TVET learners in arts and culture.	To provide N6 Arts and Culture Learners with Arts and Entrepreneurial skills in China. The students will gain Entrepreneurial skills which will allow them to be equipped to create income opportunities within the arts and culture sector, upon their return to South Africa.
Department of Sports Department of Arts & Culture; Department of Basic Education (Free State) FEDHASA SASCOC	Initiatives aimed at strengthening skills development.	To actively participate in any initiatives that are aimed at strengthening skills development in the relevant sector, as per CATHSSETA's mandate.
Hilton Hotel	Women empowerment	To capacitate South African managers to gain international on-the-job experience and coaching that will help to develop managers into General Managers in the promotion of women empowerment within the tourism industry.

4.4. CONCLUSION

This chapter has outlined the existing partnerships that the SETA has in place, 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, especially 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 the capacitating of the TVET sector to take place.

CHAPTER 5: SETA MONITORING AND EVALUATION

5.1. INTRODUCTION

This chapter of the SSP reflects on the SETA achievement of strategic priorities, based on the previous financial year. CATHSSETA is required to monitor and evaluate learning interventions, performance, and achievement of predetermined Objectives, on an annual basis. The CATHSSETA's Monitoring and Evaluation (M&E) policy sets out SETA's monitoring and evaluation framework for managing performance, by monitoring KPIs achievements in the Annual Performance Plan.

5.2. SECTOR SKILLS PLANNING REFLECTIONS

CATHSSETA has a Unit responsible for monitoring, evaluation and reporting, within the Planning and Executive Support Department. Currently, the Unit provides evaluation reports, such as Quarterly Monitoring Reports, consolidated Scarce Skills Report, consolidated M&E reports, from Learning programmes and Annual Reports, to the Research and Planning Unit, for incorporation into the Planning Process. The unit is positioned to co-ordinate all M&E processes within CATHSSETA, from planning to reporting, covering mainly Quality Assurance, Learning programmes and Special Projects. In line with the NSDP 2030 outcomes, M&E help to provide an evidence base for CATHSSETA resource allocation decisions, and they also help to identify how challenges ought to be addressed and successes replicated. CATHSSETA intends to elevate the M&E function transversally across all programmes, in order to strengthen the management of organisational performance.

5.3. PROCESS PLAN

Research reports and tracer studies, conducted on behalf of, in partnership with, or sponsored by CATHSSETA, as per the Research Agenda, are used in planning processes. They are captured in the SSP annual updates and further cascaded into the Strategic Plan, wherever applicable. Figure 15 below illustrates the CATHSSETA Planning Process that leads to the M&E process. CATHSSETA M&E strategies must describe the approach that the institution is to follow, in order to create and operate M&E systems that produce credible, accurate information, on an ongoing basis, that will be used to improve service delivery and Governance. CATHSSETA M&E systems will be integrated with existing management and decision-making systems. M&E strategies will outline how M&E findings will inform strategic and operational planning, budget formulation and execution, as well as in-year and annual reporting.

FIGURE 14: PLANNING PROCESS



5.4. SCOPE OF MONITORING AND EVALUATION

The M&E functions are as follow:

5.4.1. Monitoring

- i. Departmental programmes and Learning programmes are monitored to ensure that they are on track – against key milestones and in terms of budget – and that, where challenges emerge, these can be identified and addressed;
- ii. Monitoring processes identify any red flags, highlight potential project risks that may emerge and which could potentially jeopardise the extent to which the project/programme will meet its intended outcomes; and
- iii. Periodic reports are analysed to feed into a more in-depth evaluation process, which focuses on understanding whether the anticipated outcomes and impact have been realised.

5.4.2. Evaluation

- i. The evaluation process supports learning, within the scope of CATHSSETA, of the ways in which Projects could be designed and refined to better meet these outcomes and support the intended impact, as outlined and identified in the SSP; and
- ii. The evaluation process also allows the CATHSSETA to consider which other projects need to be prioritised, if it is to meet its overarching strategic skills development goals for the sector, as identified in the SSP and the Strategic Plan.

5.5. PREVIOUS SSP STRATEGIC PRIORITIES

The CATHSSETA SSP 2018/19 identified the following key development priorities and actions for the sector.

TABLE 21: PREVIOUS SSP STRATEGIC SKILLS PRIORITIES

No.*	Strategic Skills Priority (SSP)	Strategic Objective in the SP	Number of KPIs in the APP	KPIs Achieved
1	Qualification review	Review qualifications for sector appropriateness	2	2
2	Training provision	Increase accessibility to accreditation; and Maintain quality assurance standards.	5	5
3	Analysis of Skills Needs	Commissioned sector research to support informed decision-making; and Develop a credible SSP.	2	1
4	Workplace-based Learning	Increased number of learners enrolled in PIVOTAL programmes.	7	5
5	TVET capacity-building	Improved capacity of TVET Colleges to deliver skills development interventions.	2	0
6	Increased Partnerships	Promoting access to the workplace through partnerships with the sector.	4	4
7	Transformation in the Sector	Number of Partnership projects implemented with associations of people living with disabilities Implemented skills development projects in rural areas for youth; Address entry-level skills of youth and adult education; and Increase support to sector organisations through skills development.	20	13
8	Addressing Occupational Shortages and Skills Gaps	Increased number of learners enrolled in PIVOTAL programmes; and Address entry-level skills of youth and adult education.	18	13

**Note: Numbering is not in order of priority*

Source: Draft Annual Report, 2019/20

5.6. STRATEGIC PRIORITIES NOT ACHIEVED

The following strategic skills priorities were not achieved in 2019/20 and the reasons for that are stated in the last column of the table.

TABLE 22: STRATEGIC PRIORITIES NOT ACHIEVED			
No.	Strategic Skills Priority (SSP)	Strategic Objective in the SP	Reasons for deviation
1	Analysis of Skills Needs	Commissioned sector research to support informed decision-making.	The CATHSSETA 2019/20 Research Agenda had 6 agenda items, 4 out of 6 agenda items were achieved.
2	Training Provision	Increased number of learners enrolled in PIVOTAL programmes; and Address entry-level skills of youth and adult education.	A total of 10 KPIs were not achieved due to the following reasons: 1) 3 KPIs were not achieved due the COVID-19 pandemic lockdown which resulted in TVET Colleges and employers not being able to report completions; 2) 6 KPIs were also not achieved due to inadequate applications, the withdrawal of some employers to implement Learning programmes, and systemic challenges; and 3) 1 KPI was not met due to reporting policy challenges.
5	TVET capacity-building	Improved capacity of TVET Colleges to deliver skills development interventions.	Annual target not achieved because a suitable training service provider could not be appointed through SCM processes.

Planned mechanisms to address Skills Priorities not achieved in the previous year are covered in detail in the table below.

TABLE 23: PLANNED MECHANISMS FOR STRATEGIC PRIORITIES NOT ACHIEVED		
No.	Strategic Skills Priority (SSP)	Planned Mechanisms to Address the Skills Priorities Not achieved in the Previous Year
1	Analysis of Skills Needs	<ul style="list-style-type: none"> Implement Skills Forecasting Study: Fourth Industrial Revolution (4IR).
2	Training Provision	<ul style="list-style-type: none"> CATHSSETA has undertaken an e-learning solution initiative to be used by sector stakeholders; Develop e-learning policy and standards to which Skills Development Providers (SDPs) should adhere; E-learning Transformation through the analysis of e-learning status quo and business model development, by October 2020; Conduct provider capacity analysis to determine how many SDPs have the capacity to provide e-learning, by November 2020; Review old and new Qualifications, by November 2020; Develop Qualifications that meet e-learning standards, by March 2021;

TABLE 23: PLANNED MECHANISMS FOR STRATEGIC PRIORITIES NOT ACHIEVED

No.	Strategic Skills Priority (SSP)	Planned Mechanisms to Address the Skills Priorities Not achieved in the Previous Year
		and <ul style="list-style-type: none"> Conduct IT system configuration to meet the e-learning policy requirements and standards.
5	TVET capacity building	<ul style="list-style-type: none"> Obtain Treasury approval to allow the South African College Principals' Organisation (SACPO) to implement the TVET lecturers' capacity-Building project on behalf of CATHSSETA; Enter into a Service Level Agreement with the South African College Principals' Organisations (SACPO), by the 31st of July, 2020; Commencement of TVET lecturers' training, by the 1st of August, 2020; and Certification of learners by the 31st of March, 2021.

5.7. NSDS III TO NSDP 2030 LINKED SSP PRIORITIES

The strategic skills priorities for 2020/2021 have been identified and mapped and linked to the NSDP 2030 outcomes.

TABLE 24: NSDS III TO NSDP 2030 LINKED SSP PRIORITIES

NSDS Goals	NSDP Outcomes	CATHSSETA linked priorities/ Revised SOs.
Goal 1: Establishing a credible institutional mechanism for Skills Planning	Outcome 1: Identify and increase production of occupations in demand	Fourth Industrial Revolution; Analysis of skills needs; and Monitoring and Evaluation.
Goal 2: Increasing access to occupationally-directed programmes	Outcome 4: Support the increase in access to occupationally-directed programmes	Learning programmes/ occupationally-directed programmes.
	Outcome 7: Encourage and support worker-initiated training	Increased partnerships to include worker-initiated interventions.
	Outcome 3: Improving the skills level of the South African workforce	Qualification review.
Goal 3: Promoting the growth of a Public FET College system, that is responsive to Sector, local, regional and national Skills Needs and Priorities	Outcome 5: Support the growth of the Public College system	Training Provision; TVET capacity-building; and Transformation in the sector.
Goal 4: Addressing the low level of youth and adult Language and Numeracy Skills to enable additional training	N/A	

TABLE 24: NSDS III TO NSDP 2030 LINKED SSP PRIORITIES

NSDS Goals	NSDP Outcomes	CATHSSETA linked priorities/ Revised SOs.
Goal 5: Encouraging better use of Workplace-based Skills Development	Outcome 2: Linking education and the workplace	Workplace-based Learning and experiential learning; and Mentoring and coaching.
Goal 6: Encouraging and supporting Cooperatives, small enterprises, Worker-initiated Interventions, NGO and Community Training Initiatives	Outcome 6: Skills development support for entrepreneurship and cooperative development	SMMEs support and entrepreneurship (informal traders).
Goal 7: Increasing public sector capacity for improved service delivery and supporting the building of a developmental state	N/A	
Goal 8: Building Career and Vocational Guidance	Outcome 8: Support career development and placement services	Priority 6: Transformation (TVET and CET capacity-building); and Priority 4: Workplace-based learning and experiential learning.

5.8. Measures to ensure that currently set priorities are met

Table 25 below provides details of planned interventions for strategic skills priorities.

TABLE 25: ACTION PLAN

Skills Priority	Programme/ Project	Achieved/In Progress	Planned Measures	Link to NSDP Outcome
Fourth Industrial Revolution	Scoping Exercise: Implications for CATHSSETA and COVID-19; and Implications for E-Learning	New	Skills identification.	UPDATED
Training Provision	Assessment QCTO (JIP)	New	Engagement with QCTO, Joint Implementation Plan.	UPDATED
Analysis of skills needs	Research Projects and Qualifications Review	Research Progress Report in the RA	Research projects articulated in the Research Agenda.	UPDATED
Increased Partnerships to include Worker-initiated Interventions	TBC	TVET Colleges Employers Universities	Organised labour engagement.	UPDATED
Transformation	Mentoring and coaching/TVET & CET capacity-building	Work Readiness Programme Workplace-Based Learning & experiential learning	New teaching and learning methods/workplaces.	UPDATED

TABLE 25: ACTION PLAN

Skills Priority	Programme/Project	Achieved/In Progress	Planned Measures	Link to NSDP Outcome
SMME Interventions and Green Economy (Resource Efficiency)	TBC	SMMEs training projects	Develop skills development strategy for SMME, entrepreneurship, new enterprises and informal traders.	UPDATED
Monitoring and Evaluation.	TBC	New	Review and elevate; and Monitoring and Evaluation.	UPDATED
Addressing Occupational Shortages and Skills Gaps through E-Learning	Learning Programmes	Learning programmes delivered in line with the e-learning policy and standards	Apprenticeship; Learnerships; WIL and Internships; Bursaries; and Skills programmes.	UPDATED
Technology Advancement to combat the impact of the Global pandemic: Coronavirus - COVID-19	TBC	New	The SETA aims to continuously engage with stakeholders, as part of the Research efforts the SETA undertakes to update the Sector information, on the following initiatives: <ul style="list-style-type: none"> – Recognition; Technology; – Virtual Reality; and – E-Learning. 	UPDATED

5.9. CONCLUSION

Chapter 5 of the SSP outlined the SETA's approach to Monitoring and Evaluation. The use of information from the previous year's Annual Report and reports from tracer studies informed research and planning. Strategic priorities outlined in the previous SSP, captured in the Strategic Plan and the Annual Performance Plan, including priorities that were not achieved. Lastly, NSDP outcomes were linked to NSDS III, previous/current priorities and actions plans were presented. The SETA needs to strengthen coordination and implementation of the M&E framework, including training of staff on implementation tools.

CHAPTER 6: STRATEGIC SKILLS PRIORITY ACTIONS

6.1. INTRODUCTION

This chapter consolidates and presents the findings from previous chapters, and reflects on priority actions for the CATHSSETA sector. 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 it 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 priorities.

6.2. KEY SKILLS FINDINGS FROM PREVIOUS CHAPTERS

The Key Findings from previous chapters have been summarised in table below.

TABLE 26: KEY FINDINGS	
CHAPTER	KEY FINDINGS
Chapter 1	<ul style="list-style-type: none"> The vast majority of entities in the sector (95%) are small entities; Overall, the country's GDP declined in 2018, and the country's economy entered a technical recession; The health of the economy has been reported to be the worst in 10 years, following the 3.2% GDP contraction in the first quarter of 2019; The economic contribution declined across all economic sectors due to the effects of the COVID-19 pandemic. All six CATHSSETA sub-sectors are negatively affected; The 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 Kwa Zulu-Natal provinces, with the Northern Cape having the least; The majority of employees in the sector are African (76%), followed by Coloured employees (11%), White (9%) and Indian/Asian (4%); Females make up 57% of employees in the sector, 46% of whom are African females; The majority of employees are employed in Service and Sales occupations (35%), followed by Elementary Workers (20%) and Clerical Support Workers (15%); The age demographics illustrated show that the majority of employees in the sector (54%) are classified as youth (less than 35 years) with over 50% of them employed at lower occupational levels; and A total of 205 317 employees are reported to be employed in the sector, reflecting an 8.36% decline from the 2018/19 number of 224 039.
Chapter 2	<p>Key Skills Change Drivers</p> <ul style="list-style-type: none"> The COVID-19 pandemic has emerged as a key skills change driver in 2020. World economies have almost collapsed as a result of this pandemic. This has resulted in job losses, retrenchments and company closures; There have been increased technological advancements across the six sub-sectors e.g. Online betting; the use of the internet for purchases; social media; mobile apps; and wearable

TABLE 26: KEY FINDINGS

CHAPTER	KEY FINDINGS
	<p>technology in sports. The implication is that functional and technical skills will have to be accompanied by technological skills;</p> <ul style="list-style-type: none"> • Globalization has brought about a more ‘sophisticated tourism market’, which can be linked to advances in technology; • Social networking, marketing, e-commerce and digital marketing have become increasingly more mainstream in their use, in order to attract and retain customers; • 4IR brings in new technologies and occupations, which will translate into new occupations, reshaping future Skills needs and education and training requirements; • As a result of changes in the sector, the demand for higher quality products and services is on the rise. This requires an enhanced skills base in order to meet the changing demand; • Employers need a more flexible skills base, which is able to adapt to competing environments; • The sector needs to invest in training Interventions and Learning programmes favorable to the emerging Green Economy. The Sector needs to find innovative and strategic ways of planning and mitigation of the effects of climate change through research and development; and investment in green qualifications; and • The key skills actions emanating from the above, translate into 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"> • A total of 33% of employers indicated that the main reason vacancies are difficult to fill is due to a lack of candidates with required experience, and 31% of employers reported that they lack suitably-qualified candidates; and • The most common skills gaps across the majority of the occupational groups is leadership, communication, customer care and management skills. <p>Skills Supply</p> <ul style="list-style-type: none"> • 80% of employees are in the middle level skills band, between NQF levels 3-6; and • The sector reports 5 062 Chefs employed in 2019/20, to 6 938 in the current year. This figure has declined from 7 634 in 2017/18 and 12 232 in 2016/17. The decline in numbers can be attributed to a number of factors, including higher demand of Chefs by other sectors, Globalisation, economic decline or technological innovation. Further research needs to be conducted to establish the real causes. <p>Supply and Demand</p> <ul style="list-style-type: none"> • 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; and • In order to bridge the skills-mismatch between graduates and job requirements, the SETA needs to form strategic partnerships with industry to ensure that industry requirements are aligned with qualifications and that providers are kept informed of these requirements.
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 PSET institutions; - Public entities; - Co-operatives, NPOs and Community-based Organizations; and - Large employers and industry bodies within the Sector. <ul style="list-style-type: none"> • Successful partnership models, which may be replicated, include qualifications review, research partnerships and career guidance events that can inform existing and potential entrants to the sector of the career opportunities and paths available; • 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;

TABLE 26: KEY FINDINGS

CHAPTER	KEY FINDINGS
Chapter 5	<ul style="list-style-type: none"> • Strategic skills priorities for the previous year were assessed, and those that were not achieved were indicated and action plans provided; • Current priorities were included, together with proposed action plans; and • The SETA needs to strengthen the coordination and implementation of the M&E framework, including the training of staff on Implementation Tools.

6.3. RECOMMENDED PRIORITY ACTIONS

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:

6.3.1. IMPLICATIONS OF FINDINGS FOR SKILLS DEVELOPMENT

The key skills implications, based on the sector profile, can be summarised as follows: composition of the sector indicates that the vast majority of entities (95%) are small (0-49), pointing to the need to support and prioritise SMME 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 African females. The majority of employees in the sector (54%) are classified as youth (under 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 has increased in line with the 2% target set by the government. Out of the six sub-sectors, Hospitality accounts for 80% of total employees with disabilities. Thus, there is a need to increase the number of people with disabilities employed across the sub-sectors.

6.3.2. IMPLICATIONS FOR SKILLS PLANNING IN THE SECTOR

The technological advancement trend is critical for both skills supply and demand, and for CATHSSETA to identify skills requirements more precisely, for purposes of qualification review and priority skills identification across the sub-sectors. The implications for future skills planning is that skills in demand will be high-level 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. Proper planning requires that sub-sector specific skills demand and supply are identified and prioritised for funding.

6.3.3. KEY SKILLS IMPLICATIONS

There is a need for the development of Entrepreneurial, ICT skills and managerial skills across the sector, particularly amongst previously-disadvantaged groups, to enable transformation in the sector. All sub-sectors need to invest more on succession planning, to facilitate the retention rate of young employees; this can be done through mentorship programmes to up skill youth in the sector and enhance collaboration between HEIs, TVET Colleges and Industry, in order to facilitate a supply and

demand pipeline of skills in the sector.

Given the political and economic uncertainties, organisations within the sector need to re-skill employees on strategic marketing and public relations interventions, to plan for, and mitigate the effects of, instability on the sector. The SETA, in partnership with sector stakeholders, needs to embark on career guidance initiatives, including career exhibitions, in order to ensure that the youth are guided to the new and emerging careers in the sector.

6.3.4. SUMMARY OF ACTIONS

Planned actions for current SETA Strategic Skills Priorities are summarised in table below.

TABLE 27: SETA STRATEGIC SKILLS PRIORITY ACTIONS

SETA STRATEGIC SKILLS PRIORITY ACTIONS		
Skills Priority	Program/Project	Planned Actions
1. Fourth Industrial Revolution	Scoping exercise: Implications for CATHSSETA	Skills identification through the Research Agenda.
2. Training Provision	Assessment QCTO (JIP)	Engagement with QCTO, Joint Implementation Plan.
3. Analysis of Skills Needs	Research Projects and Qualification Review	Research projects articulated in the Research Agenda.
4. Increased Partnerships to include Worker-initiated Interventions	TBC	Organized labour engagement.
5. Sector Transformation	Mentoring and coaching/TVET & CET capacity-building	New teaching and learning methods/workplaces, WRP.
6. SMME interventions and Green Economy (Resource efficiency)	TBC	Develop skills development strategy for SMME, entrepreneurship, new enterprises and informal traders.
7. Monitoring and Evaluation	TBC	Review and elevate Monitoring and Evaluation.
8. Addressing Occupational Shortages and Skills Gaps	Learning programmes	Apprenticeship; Learnerships; WIL and Internships; Bursaries; and Skills programmes.
9. Technological Advancement to combat the impact of the COVID-19 pandemic	TBC	The SETA aims to continuously engage with stakeholders as part of the research efforts the SETA undertakes in updating sector information on the following initiatives: <ul style="list-style-type: none"> – Recognition Technology; – Virtual Reality; and – E-Learning.

6.4. 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 and through partnerships with national departments responsible for the economic sectors. The newly aligned and merged national departments will require CATHSSETA to review partnership arrangements. The Department of Sports, Arts and Culture, Department of Tourism, Department of Environment, Forestry and Fisheries, and the Department of Trade and Industry, are custodians of the following sector strategies related to CATHSSETA:

- National Cultural Industries Skills Academy, (NaCISA);
- Mzansi Golden Economy (MGE) Strategy;
- The National Sports and Recreation Plan (NSRP 2030);
- National Tourism Sector Strategy (NTSS); and
- Tourism Human Development Strategy.

6.5. CONCLUSION

The CATHSSETA sector, with its varying sub-sectors, has been deemed a crucial driver of Skills Development within 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 amounts invested. 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 innovation are generally positive and significant.

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Annexure 1

Occupations in
High Demand



ANNEXURE 1: OCCUPATIONS IN HIGH DEMAND

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
Arts and Culture	2019 -264201	Copywriter	Publicity Writer, Copy Editor, Advertising Writer	Bursary and Internship	7	16	17
	2019-251301	Multimedia Specialist	Multimedia Programmer, Animation Programmer, Computer Games Programmer, Graphical Programmer, Digital Media Specialist, Multimedia Developer	Bursary: National Diploma - Sound Technology and Production	6	13	14
	2019-352103	Sound Technician	Video and Sound Recorder, Sound Effects Person, Re-recording Mixer, Dubbing Projectionist (Sound Mixing), Dubbing Machine Operator, Sound Editor/Mixer/Recordist/Operator/Specialist, Audio Technician, Audio Operator	Learnership	4	8	8
	2019-343203	Visual Merchandiser	Display Decorator, Window Dresser	Bursary and Internship	7	8	8
	2019-263206	Heritage Consultant	N/A	Learnerships: National Certificate: Heritage Resource Management	7	8	8
	2019-343902	Light Technician	Lighting Electrician, Lighting Operator, Lighting Technician, Lighting Assistant, Lighting Director	Learnership	4	4	4
	2019-216603	Multimedia Designer	Multimedia Artist, Instructional Designer, Digital Media Designer, Interactive Media Designer	Bursary and Internship	5	2	2

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
	2019-216601	Digital Artist	Calligrapher, Lithographic Artist, Display Artist, Advertising Artist/Designer, Lettering Designer, Art Director, Exhibition/Display Designer, Film and Video Graphics Designer, Commercial Artist, Graphic Artist, Publication Designer	Bursary and Internship	6	2	2
	2019-333903	Sales Representative (Business Services)	Sales Representative (Printing), Sales Representative (Publishing), Advertising Sales Consultant, Print Cost Estimator, Business Services Officer, Sales Representative (Advertising)	Learnership	4	2	2
	2019-121905	Programme or Project Manager	Project Director	Learnership	4	2	2
	2019-132401	Supply and Distribution Manager	Supply Chain Manager, Supply Chain Executive, Storage and Distribution Manager, Procurement Manager, Freight Forwarding Customs Clearing Manager, Acquisitions Manager, Depot Manager Supply Lead Manager, Parts Manager, Purchase Manager, Freight Manager, Goods Clearance Manager	Bursary	7	2	2
	2019-511301	Gallery or Museum Guide	Museum or Gallery Attendant, Museum Host and Tour Coordinator, Gallery Assistant	Bursary and Internship	5	2	2
	2019-652302	Fitter and Turner	Printers Mechanic, Industrial Mechanician	Bursary/Internships and Workplace Experience	4	12	12

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
Conservation	2019-213307	Park Ranger	Game/Park Warden, Beach and Estuary Warden, Fish Warden, Wildlife Officer/Warden, Wildlife Conservationist	Learnerships: National Certificate - Nature Resource Guardianships Terrestrial	5	305	320
	2019-134901	Environmental Manager	Care Manager, Wild Life Management Services Manager, Pollution and Waste Manager, Agriculture and Forestry Coordinator, Water Resource Manager, Environmental Health Manager, Contaminated Sites Manager, Centralised Permits and Cites Manager, Land and Water Manager, Species Protection Manager, Conservation Science Manager, Sanitation Programme Manager, Environmental Education Manager, Wild Life Protection Services Manager, Conservation Agriculture System Manager, Water Quality Manager	Bursary/Internships and Workplace Experience	6	117	123
	2019-211402	Hydrologist	Geophysicist, Geophysical Scientist, Physical Oceanographer, Seismologist, Marine Scientist	Bursary: Bachelor of Science Hydrology	7	10	11
	2019-335906	Environmental Practices Inspector	n/a	Learnership: National Certificate Environmental Practices	7	4	4
	2019-314102	Environmental Science Technician	Water Pollution Control Officer, Parks and Reserves Technical Officer, Naturalist, Ecological Technical Officer, Conservation Scientific Officer, Environmental Technical Officer	Bursary and Internship: National Diploma in Environmental Science	7	1	1

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
	2019-421202	Gaming Worker	Casino Gaming Inspector, Casino/Gaming Dealer, Gaming Pit Boss, Gaming Inspector, Casino Surveillance Operator, Gaming Operator, Croupier, Gaming Table Operator	Learnership: National Certificate Gaming Operations	5	240	252
	2019-342302	Outdoor Adventure Guide	Shark Swimming Guide, Snorkelling Guide, River Kayaking Guide, Diving Operator, Dolphin Swimming Guide, White-water Rafting Guide, Outdoor Adventure Leader, Hunting Guide, Kayaking Guide, Cycle Touring Guides, Team Building Operator, River Rafting Guide, Horse Riding Instructor, Mountain Guide, Adventure Tourism Operator, Hiking Guide, Adventure Safari Guide, Fishing Guide, Horse Trekking Guides, Bungee Jump Master, Sea Kayaking Guide, Outdoor Adventure Instructor, Outdoor Recreation Guide, Trekking Guide	Learnership	4	2	2
	2019-211205	Climate Change Scientist	N/A	Bursary and Internship	7	2	2
	2019-242210	Business Administrator	N/A	Learnership	4	11	11
Gaming and Lotteries	2017-143101	Betting Agency Manager	Racing Betting Branch Manager, Tab Manager	Learnership: Generic Management	5	27	28
	2019-251201	Software Developer	Software Designer, ICT Risk Specialist, Software Architect, Information Architect	Bursary and Internship	6	27	28

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
			Software, Software Engineer				
	2019-351301	Network Technician	Network Support Technician	Bursary and Internship	6	17	18
	2019-141201	Restaurant Manager	Bistro Manager, Internet Cafe Manager, Cafeteria Manager, Catering Manager, Food Services Manager, Caterer, Restaurateur, Mess Manager, Canteen Manager, Food and Beverage Manager	Bursary and Learnership: Food and Beverage Studies/Services	6	1249	1311
	2019-541402	Alarm, Security or Surveillance Monitor	Answering Service Operator, Security Monitor	Bursary/Internships and Workplace Experience	4	34	34
	2019-143102	Gaming Manager	Slots Technical Manager, Slots Manager, Gaming Promotions Manager, Gaming Administration Manager, Tables Manager, Cashier Manager Gaming Race Track Operations Manager, Gaming Project Manager	Bursary and Internship	4	12	12
	2019-242211	Internal Auditor	Information Systems Auditor, ICT Internal Auditor, Audit Consultant, Internal Auditor	Bursary and Internship	7	13	13
	2019-541902	Emergency Service and Rescue Official	Emergency Response Officer, Mine Rescue Service Worker, Rope Rescue Technician, Industrial Paramedic	Bursary and Internship	5	5	5
Hospitality	2019-343401	Chef	Chef De Partie, Commis Chef, Head Chef, Pastry Chef, Demi Chef, Sous Chef,	Apprenticeship/Learnership: National Certificate -	5	1220	1281

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
			Saucier, Executive Chef, Second Chef	Professional Cookery			
	2019-515101	Hotel Service Manager	Bar Manager, Hotel Chief Steward, Commissionaire Porter, Accommodation Manager, Head Housekeeper, Head / Front Office Porter (Hotel), Hotel Concierge, Front Office Manager (Hotel), Hotel Office Manager	Skills Programme	5	1152	1210
	2019-141102	Guest House Manager	Bed and Breakfast Operator	Bursary: Management Development Programme	6	501	526
	2019-141101	Hotel or Motel Manager	Lodge Manager, Boarding House Manager, Duty Manager (Hotel), Innkeeper, Hotelier, Resort Manager, Backpackers Manager, Hostel Manager	Bursary: Management Development programme	7	401	421
	2019-512101	Cook	n/a	Skills Programme: Cook Convenience/Assistant Chef	2	140	147
	2019-513101	Waiter	Drinks Waiter, Night Club Hostess, Wine Attendant, Restaurant Hostess, Food and Beverage Attendant, Silver Service Waiter, Dining Room Attendant, Maitre D, Formal Service Waiter, Lounge Assistant, Sommelier, Wine Steward	Skills Programme	5	107	112
	2019-841201	Kitchen hand	Pantry Attendant, Sandwich/Salad Preparer, Kitchen Steward, Kitchen Assistant (Non-domestic), Dishwasher	Skills Programme	2	102	107
	2019-513202	Barista	Coffee Maker	Skills Programme	5	89	93

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
	2019-311903	Food and Beverage Technician	Beverage Laboratory Technician, Distillery Technician, Brewery Technician, Gas Chromatographic, Food Laboratory Technician, Fermentation Technician, Dairy Laboratory Technician, Sugar Laboratory Technician, Food Science Technician, Brew master/Master Brewer, Milling Laboratory Technician	Bursary and Internship	6	32	34
	2019-422401	Hotel Receptionist	n/a	Skills Programme and Learnership: Hospitality Reception; WIL: Hospitality studies	5	20	21
	2019-121206	Health and Safety Manager	Safety, Health and Environmental (SHE) Manager	Bursary and Internship	5	14	15
	2019-811201	Commercial Cleaner	School Cleaner, Workshop Cleaner, Factory Cleaner/Sweeper, Water blaster, High Pressure Water Jetting Operators, Office Cleaner, Hotel/Motel Cleaner, Building Exterior/Interior Cleaner, Cleaner (Non-domestic)	Skills Programme	1	98	98
	2019-422206	Call or Contact Centre Agent	N/A	Learnership	3	6	6
	2019-252301	Computer Network and Systems Engineer	Network Programmer/Analyst, Network Engineer Computer Systems/Service Engineer, Communications Analyst (Computers), Systems Engineer, Computer Network Engineer, Systems Integrator, Network	Bursary and Internship	7	6	6

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
			Support Engineer, Computer Systems Integrator, ICT Customer Support Officer				
	2019-243204	Event Producer	Concert Promoter/Organiser, Meeting Planner Event Coordinator, Government, Protocol or Civic, Event Organiser, Event Director, Event Manager Specialist, Festival Coordinator, Conference and Event Organiser/Coordinator, Social/Life Cycle Organiser, Wedding Coordinator, Professional Conference Organiser, Sports Event Organiser	Learnership	4	20	20
	2019-732101	Delivery Driver	Light Utility Vehicle (LUV) Driver, Van Driver, Grocery Deliverer, Fast Food Delivery Driver, Driver-messenger, Taxi Truck Driver, Meals On Wheels Driver, Armoured Car Driver	Learnership	3	50	50
	2019-132102	Manufacturing Operations Manager	Industrial Production Manager, Plant Superintendent Processing Manager, Planning Manager (Manufacturing), Operations Manager (Production) Works/Workshop Manager (Manufacturing), Processing Unit Manager, Distillery Manager, Plant Manager (Manufacturing)	Bursary and Internship	5	7	7
Sport, Recreation and	2019-143107	Fitness Centre Manager	Health Club Manager, Gym Manager, Fitness Centre Administrator, Sports Club	Bursary and Internship	6	219	230

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
Fitness			Manager				
	2019-342301	Fitness Instructor	Physical Training Instructor, Aerobics Instructor, Physical Fitness Trainer, Health and Fitness Instructor, Aquarobics Instructor, Gym Instructor/Trainer, Gymnasium Attendant, Physical Education Officer, Physical Activity Coordinator, Fitness Centre Worker, Fitness Consultant/Trainer/Instructor, Personal Trainer	Skills Programme: Fitness Instructor	5	659	692
	2019-342204	Sport Coach	Diving Coach, Callisthenics Instructor, Show Jumping Instructor, Diving Instructor (Open Water), Football Coach, Martial Arts Instructor, Dive Master, Snowboarding Instructor, Water Polo Coach, Gymnastics Coach or Instructor, Tennis Coach, Athletic Coach, Snorkelling Instructor, Swimming Coach or Instructor, Polo Coach, Dressage Instructor, Squash Coach, Cricket Coach, Scuba Instructor, Surface Supply Breathing Apparatus (SSBA) Instructor, Equine Tutor/Riding Instructor, Skiing Instructor, Snow sport Instructor, Basketball Coach, Rhythmic Gymnastics Coach	Learnership: Further Education and Training Certificate: Sport Coaching: Juniors/Beginners	4	11	12

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
	2019-143108	Facility Centre Manager	Riding School Manager, Golf Course Manager, Gymnasium Manager, Sport Stadium Manager, Leisure Centre Manager, Indoor Sports Centre Manager (Squash, Tennis, Ten Pin Bowling etc), Aquatic Centre Manager	Bursary and Internship	6	2	2
Tourism and Travel Services	2019-141201	Travel Consultant	Inbound Tour Manager, Travel Agent Representative, Travel Consolidator, Booking Travel Clerk, Travel Reservation Clerk, Travel Officer, Travel Arrangements Manager, Travel Agent, Travel Clerk, International Travel Consultant, Domestic Travel Consultant, Travel Wholesaler	Learnership: National Certificate - General Travel	5	683	717
	2019-122101	Sales and Marketing Manager	Key Account Manager, Insurance Sales and Marketing Manager, Business Development Manager, Business Support Manager	Bursary and Internship	6	177	186
	2019-122105	Customer Service Manager	Client Services Advisor, Client Services Manager/Representative, Client Services Manager, Customer Services Engineer, Customer Care Manager/Representative	Skills Programme	3	53	56

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
	2019-333201	Events Manager	Functions Manager, Exhibition Organiser, Event Planner, Marketing Campaign Organiser, Conference and Event Organiser, Destination Manager, Government Protocol or Civic Event Organiser, Exhibition Director, Function Planner, Wedding Planner, Trade Fair Manager, Social/Life Cycle Coordinator, Conference Planner	Bursary and Internship	6	15	16
	2019-251102	Data Scientist	N/A	Bursary and Internship	7	2	2
	2019-431101	Accounts Clerk	Creditors Clerk, Accounts Payable or Receivable Clerk Debtors Clerk, Accounting Clerk, Account Coordinator/Controller, Billing Administrator/Representative/Officer, Assets Clerk/Coordinator, Ledger Clerk Audit Clerk, Settlement Clerk/Officer	Learnership	3	8	8
ALL	2019-862202	Handyperson	Handy Person, Hotel Yard person, Hotel Useful, Handy Man	Workplace (SIPS)	3	93	98
	2019-134903	Small Business Manager	Owner Manager, Entrepreneurial Business Manager	Bursary: Management Development programme	6	88	92
ALL	2019-441903	Program or Project Administrators	Senior Officer, Project Programme Specialist, Support Officer, Project Coordinator, Course Coordinator, Administrator, Administration Officer, Assistant Secretary of The Cabinet, Strategic Support Officer, Project	Workplace (SIPS)	5	80	84

SUB-SECTOR	OFO CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION	NQF LEVEL	QUANTITY NEEDED BY THE SECTOR	QUANTITY TO BE SUPPORTED BY SETA IN 2020*
			Corrections Operations Advisor/Coordinator, Programme/Project Coordinator, Project Planner, Project Controller, Project Advisor/Leader, Consents Officer/Clerk				
	2019-112101	Director (Organisation)	Managing Director (Enterprise/Organisation), Chief Executive Officer (CEO), Deemed (Shadow) Director, Company Director, Independent Non-executive Director, Managing Director, Senior/Lead Independent Non-executive Director, Alternative Director, Non-executive Director, Executive Director	Bursary: Business Administration	7	71	75
ALL	2019-733201	Truck Driver (General)	Lorry Driver, Freight Operator, Livestock Hauler, Dumper Truck Driver, Tilt Tray Driver, Compactor Driver (Rubbish Collection), Logging Truck Driver, Road Train Driver, Cement Mixer Driver	Workplace (SIPS)	4	36	38

**Subject for review once SLA targets have been approved*

Annexure 2

Continuous Improvement Plan



ANNEXURE 2: CONTINUOUS IMPROVEMENT PLAN

AUTHORISATION OF THE SECTOR SKILLS PLAN CONTINUOUS IMPROVEMENT PLAN

I, the undersigned, hereby approve, on behalf of the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA), the contents of the Sector Skills Plan (SSP) Continuous Improvement Plan (CIP) for the period 2021/22.

Approved By:

Signature:



Keitumetse Lebaka (Ms)
Chief Executive Officer (CEO)



David Themba Ndlhovu (Mr)
Accounting Authority Chairperson

1. INTRODUCTION

The CATHSSETA CIP aims to provide the Department of Higher Education and Training (DHET) with a guideline to the strategies that have been incorporated and employed by the SETA, in order to ensure the production of an SSP that is fully reflective of the sector. The following areas will be further expanded upon to provide details regarding the 2021/22 plans, executed for the current financial year, that are aimed at improving the quality and relevance of the SSP:

- Research Agenda and Strategy;
- Collaboration with Universities and TVET Colleges;
- Improving Data Sources;
- Organising Framework for Occupations (OFO) and Sector PIVOTAL list;
- Developing Mechanisms for Skills Planning and LMIP;
- Alignment with Government priorities;
- Research Capacity in the System;
- Career Advice System;
- The role of the AA in the Development of the SSP; and
- Stakeholder engagement in preparation of the SSP.

2. CIP MATTERS

The following table details CIP matters which the SETA has addressed during the 2020/21–2021/22 period, and plans which the SETA aims to implement in the current financial year.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
1. Research Agenda and Strategy.	<p>The CATHSSETA research agenda for the financial year 2020/21, focuses on the following topics:</p> <ul style="list-style-type: none"> Tracking and Tracing study; Skills Forecasting Study: Fourth Industrial Revolution; Research Partnerships with HEIs; Impact Assessment; and Training Analysis. 	<p>Due to COVID-19, CATHSSETA has been unable to appoint a service provider to carry out research services, as all non-essential operations in the country have been halted.</p> <p>Due to SCM related delays, CATHSSETA has to re-advertise the tender to appoint a service provider to conduct an Impact Assessment study to review the impact of CATHSSETA-funded learning interventions in terms of the NSDS III, on the intended beneficiaries.</p> <p>The SETA aims to appoint a service provider in the coming financial year</p>	<p>CATHSSETA plans to appoint service providers to conduct the following studies:</p> <ul style="list-style-type: none"> Tracking and Tracing Study; and Skills Forecasting Study: Fourth Industrial Revolution. <p>The SETA will be conducting a Training Analysis using internal research capacity to determine the number of learners trained against planned training in the previous reporting period, as per Mandatory Grant data.</p>
2. Collaboration with Universities and TVET Colleges.	<p>Of the 43 TVET Colleges across 55 campuses offering National Certificate vocational (NCV) in Hospitality and Tourism, some of the TVET Colleges have obtained approval from CATHSSETA to offer CATHSSETA-accredited NQF-aligned qualifications;</p> <p>CATHSSETA has signed MoUs with various TVET Colleges to offer Bursaries, Learnerships, Experiential Learning, and to participate in the review of sector-related Qualifications;</p> <p>The SETA is currently undergoing a process of reviewing 7 Qualifications; and</p> <p>CATHSSETA currently has no research partnerships or collaborations due to procurement processes and challenges relating to the establishment of Research</p>	<p>CATHSSETA plans to collaborate with universities through research partnerships in the 2020/21 financial year. This will increase the SETA's research capacity and improve data and research on the various CATHSSETA sub-sectors; and</p> <p>CATHSSETA established offices in the Eastern Cape, Western Cape and KwaZulu-Natal, situated in the premises of Lovedale, Northlink and Umgungundlovu TVET Colleges, respectively. These offices are fully operational and capacitated to provide support to stakeholders.</p>	<p>The SETA plans to review 10 qualifications in the current financial year; and</p> <p>As part of creating partnerships with Higher Educational Institutions, CATHSSETA will partner with selected HEIs in the necessary research areas.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
	Chairs, within the SETA context.		
3. Improving Data Sources.	<p>CATHSSETA conducts workshops on an annual basis to capacitate organisations submitting Mandatory Grant applications;</p> <p>The SETA utilises national data sources and research conducted by other government departments, national research institutions and industry publications, in order to gather information about the sector;</p> <p>The SETA also completed a research study, through which it consulted with industry stakeholders. Focus group sessions with key role-players in the various sub-sectors were conducted; and</p> <p>CATHSSETA consulted various sources, including the Higher Education Management Information System (HEMIS), maintained by the DHET, publications and reports by the World Travel and Tourism Council, National Gambling Board, South African Tourism, Stats S.A. and stakeholders from all sub-sectors.</p>	<p>In April 2020, CATHSSETA conducted online Key Informant Surveys, to solicit additional information for the 2021 – 2022 SSP update. However, DHET recently provided a revised version of the questionnaire, which the Research unit has since has distributed to sampled stakeholders; and</p> <p>Additional SSP online workshops will be conducted between June and July 2020, to verify the results of the draft SSP submitted on the 15th of July 2020. Inputs from these engagements will be incorporated into the 30th of August 2020 SSP submission of</p>	<p>There are plans to use the Regional Offices as sources of data. With funding, the Regional Offices will also be developed in order to serve as Data Collection Centres;</p> <p>Expanded Research Agenda to reflect research needs of the Sector in 2020/21;</p> <p>SETA plans to continue to produce Sector Analysis reports, which are essentially an equivalent of mini SSPs for each of the 6 CATHSSETA sub-sectors. This will ensure an even data representation across the 6 sub-sectors and it will provide the SETA with a comprehensive analysis of the Sector;</p> <p>Research and Planning Unit to disseminate the new version of the Key Informant Questionnaire with Key Role Players and uplift results to the final version of the SSP; and</p> <p>Additional SSP virtual Workshops will be conducted in July 2020, to verify the results of the draft SSP to be submitted on the 15th of July, 2020, and to solicit further information for the final draft submission. Inputs from these engagements will be incorporated in the SSP submission of the 30th of August, 2020.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
4. Organising the Framework for Occupations (OFO) and Sector PIVOTAL list.	CATHSSETA complies with the use of OFO version 2019, which is the most current version.	The use of the 2019 OFO codes is reflected in all applicable documents, including Skills in High Demand, Sectoral Priority list, as well as Mandatory Grant application data.	<p>As part of the Research Agenda for 2020/21, SETA plans to draft an OFO Handbook and mapping tables for all six sub-sectors;</p> <p>The undertaking of an OFO mapping exercise to map out all occupations that fall under the 6 CATHSSETA sub-sectors will assist internal and external stakeholders in identifying CATHSSETA OFO codes;</p> <p>The Research and Planning Unit conducted a Baseline Study in February 2020 to find out to what extent the CATHSSETA Sector understands the purpose of the OFO; and</p> <p>The team used the platform to inform stakeholders about the importance of submitting the correct OFO codes, and to capacitate stakeholders on the OFO Guide. Furthermore, the exercise was used as a scoping exercise to clearly define the scope of the CATHSSETA OFO Handbook for 2020-2025, which will be developed in the 2020/21 Financial Year. However, due to the COVID-19 pandemic, this Research Agenda item might be deferred to the next Financial Year, due to budgetary constraints.</p>
5. Developing Mechanisms for Skills Planning and LMIP.	<p>CATHSSETA has developed and employs various mechanisms for Skills Planning, including increased partnership, stakeholder consultations, increased research initiatives to assess skills requirements of the Sector and the impact of learning interventions;</p> <p>SETA identified various platforms to disseminate research recently undertaken</p>	Internal stakeholders, including the relevant Board Structures, will be consulted for their input into the SSP.	<p>Consult and solicit input through the relevant Board Structures; and</p> <p>Participate in Mandatory Grant workshops.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
	<p>in the Sector; and</p> <p>Internal stakeholders are consulted for their input, which also involves translation of the Skills Development Priorities into Key Performance Indicators (KPIs) for the SETA.</p>		
6. Alignment with Government priorities.	CATHSSETA's strategic priorities are aligned and developed in line with the Primary Guiding Priorities of the Department of Higher Education and Training (DHET), as well as taking into consideration sub-sector strategies and plans relevant to each of the sub-sectors.	<p>Key Policy drivers have been identified and considered in the 2021/22 SSP, which include the National Development Plan, the White Paper for Post-School Education and Training, Sector Education and Training (SETA) Grant Regulations and the National Skills Development Plan (NSDP);</p> <p>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 (THRD) Strategy, the Lotteries Act 32 of 2013, and the Department of Environmental Affairs (DEA) Strategy; and</p> <p>These Government priorities and strategies have been taken into consideration in developing the final CATHSSETA 2021–20225 SSP Priorities.</p>	<p>CATHSSETA continuously reviews all relevant strategies and plans and utilises all updates/changes to guide the development of SETA's priorities; and</p> <p>Upon approval of the Tourism Human Resource Development Strategy, CATHSSETA will identify and address the priorities that are pivotal to achieving the objectives of the Strategy.</p>
7. Research Capacity in the System	The CATHSSETA Research Unit resides within the Executive Support Department and is headed by a Research and Planning Manager together with support staff.		As part of increasing research capacity and in order to improve data sources, CATHSSETA will be creating partnerships with Higher Education Institutions. CATHSSETA will partner with selected HEIs in the necessary areas.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
8. Career Advice System.	<p>Each CATHSSETA sub-sector prepares Career Guides in order to inform potential learners of qualifications, Skills Programmes and Learnerships available, as well as the entry-level requirements for each occupation;</p> <p>During the last three years, CATHSSETA has aimed to reach potential learners, in order to disseminate information on Learning Programmes;</p> <p>SETA participates annually in national events, such as, the National Tourism Council Expo and Africa Travel Indaba;</p> <p>CATHSSETA, in partnership with the Department of Tourism (DT) and a host Provincial Tourism Department, host the Annual National Tourism Careers Expo (NTCE) which creates a highly interactive platform for the promotion and identification of tourism careers, job and entrepreneurial prospects.</p>	<p>Career Guides for all 6 sub-sectors were distributed in June 2019;</p> <p>A total of 20 Career Guidance Interventions were attended by CATHSSETA in 2019/20; and</p> <p>Regional Offices are also geared to offer career guidance at TVET Colleges.</p>	<p>A total of 20 Career Guidance events are planned for the 2020/21 Financial Year; and</p> <p>Plans are underway for the annual NTCE. The annual NTCE, which will now be held virtually, is scheduled to take place in November 2020.</p>
9. The role of the AA in the Development of the SSP.	<p>In April 2020, DHET appointed a new Board Chairperson, and Board members, with a mandate to give strategic direction to the business affairs of CATHSSETA;</p> <p>Relevant Board structures, such as the Governance and Strategy Committee, have also been established. The role of the Governance and Strategy Committee</p>	<p>The AA endorses the final SSP as per recommendations by the relevant committees.</p>	<p>The Governance and Strategy Committee and the Board, are integral in providing relevant sector-specific insight to the CATHSSETA, and will continue to provide input on the first and final draft of the SSP.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
	<p>is to provide expert advice on the Sector, to facilitate and enable broad sub-sector specific stakeholder consultation and participation, and to give advice on priority skills' requirements for sub-sectors. The Governance and Strategy committee was consulted to provide input into the SSP; and</p> <p>The first draft of the SSP will be submitted to the Board and G&S Committee for approval.</p>		
<p>10.Stake-holder engagement in the preparation of the SSP.</p>	<p>Stakeholders are consulted as part of internal research and/or research studies that have been commissioned from the service providers;</p> <p>In-depth interviews were conducted with the Key Role Players in the various sub-sectors. Industry consultations also took place through Focus Group sessions;</p> <p>Key Informant telephonic interviews (to evaluate skills' needs and priority interventions) – 60 sampled employers in the 6 sub-sectors (as opposed to the 10 recommended by DHET) will be conducted post the first draft SSP submission;</p> <p>The Research and Planning Unit will conduct an Online Survey post the first SSP draft submission in order to disseminate the findings of the SSP and to</p>	<p>Additional Stakeholder Consultation sessions will be held online, in July 2020, to verify preliminary SSP draft findings and to solicit further input for the final 2021/22 SSP; and</p> <p>The Labour Union report has been submitted for approval.</p>	<p>SETA aims to continuously engage with stakeholders as part of the research efforts that SETA undertakes in the updating of sector information; and</p> <p>The Unit will host virtual Research Consultative workshops with each of the nine Provinces in order to verify preliminary findings and to solicit further inputs post the first SSP draft submission.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
	<p>take comments on the draft SSP; and</p> <p>Research and Planning conducted desktop and telephonic research on the extent of involvement of Labour Unions in the six CATHSSETA sub-sectors.</p>		

3. CONCLUSION

This document has outlined the CIP matters and plans of the SETA in order to address the issues identified. SETA has made significant progress in stakeholder engagements for all the sub-sectors, during the consultation period prior to the first and final draft submissions of 2020. This has also improved data sources. The appointment of a Research Partnership is underway and we expect this partnership to improve SETA's research capacity further. The SETA has put in place Governance structures, including a Board comprising of Government, sub-sector, employer and Labour Organisation representatives. This SSP was presented to the Board and its sub-committees for input and approval.

Annexure 3

Research Agenda



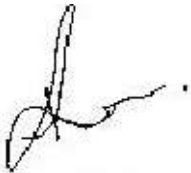
ANNEXURE 3: RESEARCH AGENDA

AUTHORISATION OF THE RESEARCH AGENDA

I, the undersigned, hereby approve, on behalf of the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) the contents of the draft Research Agenda for the 2020/2021 period.

Approved By:

Signature:



Keitumetse Lebaka (Ms)
Chief Executive Officer (CEO)



David Themba Ndlhovu (Mr)
Accounting Authority Chairperson

ACRONYMS & ABBREVIATIONS

APP	Annual Performance Plan
CATHSSETA	Culture, Arts, Tourism, Hospitality And Sport Sector Education and Training Authority
DHET	Department of Higher Education and Training
ETQA	Education, Training and Quality Assurance
4IR	Fourth Industrial Revolution
HEI	Higher Educational Institution
NSDP	National Skills Development Plan
NSDS	National Skills Development Strategy
OFO	Organising Framework for Occupations
PFMA	Public Finance Management Act
PSET	Post-School Education and Training
SDA	Skills Development Act
SP	Strategic Plan
SSP	Sector Skills Plan
ToR	Terms of Reference
TVET	Technical and Vocational Education and Training
UoT	University of Technology

1. INTRODUCTION

CATHSSETA is a statutory body, established through the Skills Development Act of 1998. It is a Schedule 3(a)-listed public entity, in terms of the Public Finance Management Act (PFMA) (Act No. 1 of 1999, as amended), and it is accountable to the Department of Higher Education and Training (DHET). CATHSSETA conducts its activities within the following six sub-sectors:

- Arts, Culture and Heritage;
- Conservation;
- Gaming and Lotteries;
- Hospitality;
- Sport, Recreation and Fitness; and
- Travel and Tourism.

Research is a key component in providing evidence to inform decision-making, policy review and strategy formulation, and in order to improve systems and services within the SETA. This Research Agenda seeks to respond to the Outcomes and Principles of the National Skills Development Plan (NSDP 2030).

The NSDP underpins the following principles: (1) To situate the NDSP within an integrated PSET system; (2) To contribute to the country's socio-economic development objectives; (3) To advance an equitable and integrated system; (4) To promote greater inclusivity and collaboration; (5) To focus on a support system for learners and employers; (6) To place strong emphasis on accountability; (7) To understand the demand for skills; (8) To steer supply: qualifications and provision; and (9) To steer supply funding mechanisms.

This Research Agenda also seeks to respond to the outcomes of the NSDP, which are: (1) To identify and increase the production of occupations in high demand; (2) To link education and the Workplace; (3) To improve the skills level of the South African workforce; (4) To increase access to occupationally-directed programmes; (5) To support growth of the public college institution type, as a key provider of skills required for socio-economic development; (6) To support skills development for entrepreneurship and cooperative development; (7) To encourage and support worker-initiated training; and (8) To support career development services.

The core function of the Research, Planning and Performance unit is to uplift the research and skills planning activities of CATHSSETA, with the aim of directly contributing to the establishment of a reliable institutional mechanism for skills planning both for our sector and our country.

The Unit plays an integral role in gathering statistical data and other relevant information about the labour market, skills needs and training provision. Such information is essential in planning, in order to meet the country's skills needs and to guide investment in the provision of education and training. The

Unit is further responsible for producing the Strategic Plan (SP), Annual Performance Plan (APP) and Sector Skills Plan (SSP), as well as all research studies, the establishment of research partnerships, the coordination of research conferences and all skills development and planning activities, from the 1st of April, 2020 onwards.

2. THE IMPORTANCE OF RESEARCH

The SSP is the key research output of CATHSSETA. The SSP assists in outlining the occupational shortages list in the CATHSSETA sector which is prioritised in the scoping of projects on an ongoing basis. The SSP is also the foundation on which the SP and APP of the SETA are developed. The SSP is submitted, together with the SP and APP, as an annexure of the SETA documentation tabled in Parliament annually. The DHET SSP Framework and Requirements require the following from the SETA SSPs:

- i. Authoritative and focused research on the state of the skills market;
- ii. Production of skills intelligence to support growth and development;
- iii. Consistent, rich and comparable understanding within the different economic sectors;
- iv. Participation by stakeholders in the development process;
- v. Evidence-based research; and
- vi. Actionable interventions that make a difference to skills planning.

Thus, all research conducted or commissioned by CATHSSETA is intended to feed into the SSP for strategic planning that outlines key strategic interventions to address identified skills needs and constraints for effective recruitment, utilisation and skills development. Table 1 below outlines the Research Agenda items that CATHSSETA intends to conduct in 2020.

Name of Study	Purpose of the Study	Main Objectives of Study	Research Mechanism	Valid for the Period
The Extent of active labour unions in the CATHSSETA sub-sectors.	<p>The Research and Planning unit was requested by the office of the CEO to conduct desktop research on the extent of involvement of labour unions in the six CATHSSETA sub-sectors. During the NSDS III period, labour unions have been envisioned as critical networks for organisations in facilitating the education and training needs of their members and other workers to suit their needs in a manner that is also beneficial to the South African economy;</p> <p>As we transition into the NSDP, the plan places even greater emphasis on bridging the gap between the employer, SETA and the labour unions in terms of outcome 7 (Encourage and support worker initiated training); and</p>	<ol style="list-style-type: none"> 1. To assess to what extent are labour unions active in the six CATHSSETA sub-sectors; 2. How many are active and have recognition agreements with employers; 3. How many are involved or are benefitting from CATHSSETA funding; 4. Who are the majority unions active in the different CATHSSETA subsectors; and 5. What are the training needs of the unions: 	Desktop research (internal study)	1 November 2019 – 31 March 2020

Name of Study	Purpose of the Study	Main Objectives of Study	Research Mechanism	Valid for the Period
Sectoral Analysis of COVID-19 in the CATHSSETA sub-sectors.	To give a brief overview of the effects of COVID-19 on the six CATHSSETA sub-sectors.	<ol style="list-style-type: none"> 1. To understand how each sub-sector of the CATHSSETA is affected by the surge and spread of the COVID-19 pandemic; 2. To understand how businesses and stakeholders within the CATHSSETA sub-sectors will be affected; 3. To understand the threat of business closing down and resultant job losses; 4. To give an overview of the government's response to the pandemic to guide how CATHSSETA can respond to assist its stakeholders; 5. To outline the different resources available including relief funds set up to assist those businesses that are struggling; and 6. To understand the extent of the impact of the pandemic on the small enterprises and the risk to their survival. 	Desktop research (internal study)	1 April 2020 – June 2020
Tracking and Tracing study.	The primary focus of the study is to understand the outcomes of Workplace-Based Learning (WBL), through the tracking and tracing of learners supported by CATHSSETA. The main purpose of the study will be to provide the SETA with information concerning activities of learners who have completed CATHSSETA programmes. Tracer studies are designed to determine whether or not a programme is achieving its mission and to assist in demonstrating programme outcomes.	<ol style="list-style-type: none"> 1. To determine the destination of learners who have completed Learnerships, Internships and Apprenticeships; 2. To understand the factors associated with employment/unemployment; 3. To understand the intricacies of articulating qualifications into occupations; 4. To determine the nature of employment of those learners who receive employment; and 5. To pilot a survey on the perceptions of employers about the value of Learnerships, Apprenticeships and Internships. 	Research Commissioned	1 st September 2020 – 31 st September 2021

Name of Study	Purpose of the Study	Main Objectives of Study	Research Mechanism	Valid for the Period
Skills Forecasting Study: Fourth Industrial Revolution (4IR).	We need further research on the impact of the 4IR on the six CATHSSETA sub-sectors. How will the 4IR affect jobs in the sector and what are the future skills employers should be planning for? What jobs will be lost? How do we re-skill employees affected by the disruption? How can we support employers?	<ol style="list-style-type: none"> 1. To determine the impact of the 4IR on the six CATHSSETA sub-sectors; 2. To discover which future occupations emerge from the study; 3. To find out how employers can plan and prepare for the disruption. 	Research Commissioned	1 st July 2020 – 30 th December 2020
Higher Education Institution (HEI) Partnership by RFQ	As part of creating partnerships with HEIs, the CATHSSETA will partner with selected HEIs in the specific areas.	The SETA has entered into a partnership with University of the Witwatersrand (WITS) to research the Gaming and Lotteries sub-sector. As part of the SSP findings, this sub-sector has consistently been reported as lacking in sufficient information to inform skills planning	Research Commissioned	1 st August 2020 – 31 st January 2020
Impact Assessment	The purpose of this project is to conduct an Impact Assessment Study to review the impact of CATHSSETA-funded learning interventions in terms of the NSDS III, on intended beneficiaries (it is expected that the NSDS III transformational imperatives will be used as indicators on this project). The overall objective of the study is to evaluate the effectiveness of implementation of CATHSSETA learning programmes, and to measure the impact on programme beneficiaries for the period 2015/16 to 2018/19.	<ol style="list-style-type: none"> 1. To assess the impact of CATHSSETA Learnerships, Bursaries, Internships, Artisans, Skills Programmes and WIL interventions, on Programme beneficiaries, for the period 2015/16 to 2018/19; 2. To ascertain the impact of CATHSSETA interventions in addressing NSDS III Goals and Imperatives; 3. To evaluate the socio-economic status of beneficiaries, following intervention/support from CATHSSETA; 4. To assess the employment status of CATHSSETA beneficiaries, including an assessment of the promotion and/or absorption rate of beneficiaries into the labour market; 5. To determine the completion rate of Learnerships, Bursaries, Internships, Artisans, WIL interventions and Skills Programmes; 	Research Commissioned through tender	1 January 2021 – 31 st March 2022

		6. To evaluate the alignment of the supply and demand of skills in the labour market, within CATHSSETA sub-sectors; 7. To assess the relevance of qualifications and services rendered by CATHSSETA; 8. To assess the impact of training interventions on employers in the various sub-sectors, within the scope of CATHSSETA; 9. To assess whether CATHSSETA interventions have positively impacted the lives of beneficiaries, and what the social impact has been on their families and their social environment		
Training Analysis	The aim of this report is to provide an analysis of the training achieved by the sector through a comparison between the training planned in the previous reporting period (i.e. 2017) and the training achieved within the current reporting period (i.e. 2018).	To determine the number of learners trained, against planned training in the previous reporting period, as per Mandatory Grant data	Internal Research	1 st April 2020 – 31 March 2021

3. PURPOSE OF THE RESEARCH AGENDA

The Research Agenda sets out the research needs of CATHSSETA for the period from the 1st of April, 2020, to the 31st of March, 2021. The purpose of the Research Agenda is to help organise and prioritise research requests, and to improve the quality of the data and information available within the CATHSSETA sector. It provides a mechanism for building research capacity, as well as a guide for the allocation of resources for research and the strategic actions that will be undertaken to achieve the stated goals.

4. THE CONCEPT OF RESEARCH

For the purposes of the Research Agenda, the term “research” is taken to mean rigorous and systematic enquiry and analysis. As such, research may be empirical or theoretical, quantitative or qualitative and applied or basic.

5. THE NEXUS OF RESEARCH POLICY

The relationship between research and evidence based policy decision making is a complex one. Apparently, there is more of an indirect influence of on policy, process and practice. Research provides much-needed insight into the CATHSSETA sector, its workings and skills requirements. There is the need for a sustained dialogue between researchers and the users of research, in cultivating a practice of employing research-based evidence in the policy process.

6. CATHSSETA AND THE RESEARCH COMMUNITY

The nature of research may vary in complexity and scale. CATHSSETA aims to achieve the priorities of its Research themes/topics through the implementation of the following actions:

- 6.1. Commissioned research: Research commissioned through the appointment of research partners, with Terms of Reference specified by CATHSSETA, as part of the research theme/topic outlined in this Strategy;
- 6.2. Research Partnerships: Research projects undertaken in partnership with other public entities or government departments aligned with CATHSSETA’s research priorities;
- 6.3. Postgraduate Research Partnerships: Partnerships with public South African Universities by means of Memoranda of Understanding which outline both research collaboration areas and research grants. Postgraduate students from the identified universities will receive research grants to carry out research in areas pertaining to skills development and training, as well as to broader topics relevant to the CATHSSETA sector. CATHSSETA research partnerships will focus on proposing and supporting a university-based research programme that will:
 - Refine and, where necessary, develop new methods for collecting sector skills information that can be used on an ongoing basis for improved skills planning;
 - Gather and analyse Sectoral information in order to establish baselines or updates on current information, using rigorous processes that can then be applied, on an ongoing basis, for

improved skills planning;

- Study particular issues that are currently proving to be bottlenecks in our understanding, and provide practical frameworks, guidelines or 'maps', wherever appropriate;
- Evaluate pilot skills development initiatives in order to inform further roll-out, adaption or step-changes;
- Produce practical reports (in addition to academic theses) in order to inform sector skills development initiatives;
- Contribute to the strengthening of recognised Centres of Expertise in Human Capital Development within the respective sub-sectors; and
- Contribute to the building of a cadre of high-level Human Capital Development Skills Specialists in the country to seed the expansion of Human Capital Development Expertise into sector organisations and universities.

7. RESEARCH PRIORITIES

The 2019/20 SSP has identified the following key skills development priorities for the sector:

- i. Qualification review;
- ii. Training provision;
- iii. Technological advancement;
- iv. Analysis of skills needs;
- v. Workplace-based learning and experiential learning;
- vi. Mentoring and coaching;
- vii. TVET capacity building;
- viii. Increased partnerships; and
- ix. Transformation in the sector.

In addressing these priorities, the Research Agenda comprises the following seven (7) themes/topics that have been aligned to the key imperatives of the White Paper on Post-School Education and Training, and the DHET's Research Agenda. The listed themes/topics are complementary and are not exhaustive:

- 7.1. The Extent of active labour unions in the CATHSSETA sub-sectors;
- 7.2. Sectoral Analysis of COVID-19 in the CATHSSETA sub-sectors;
- 7.3. Tracking and Tracing study;
- 7.4. Skills Forecasting Study: Fourth Industrial Revolution;
- 7.5. Research Partnerships with HEIs;
- 7.6. Impact Assessment; and
- 7.7. Training Analysis.

8. RESEARCH FUNDING AND PROCUREMENT

- 8.1. Research partnerships are critical in meeting CATHSSETA's research priorities. CATHSSETA will explore and initiate partnerships with Researchers and the area of research, so as to meet the research needs of the sector.
- 8.2. To support the objectives of the Research Policy, a research grant shall be awarded to a specialised unit or faculty of a public university or a University of Technology (UoT), in order to conduct sector-based research for CATHSSETA;
- 8.3. Research funding shall be sourced from the CATHSSETA Discretionary Grant;
- 8.4. Research projects shall be funded within minimum and maximum thresholds, subject to budgetary availability;
- 8.5. Funding of research shall be for research projects commissioned by CATHSSETA; and
- 8.6. CATHSSETA shall issue the Terms of Reference (ToRs) for any research required, in terms of the PFMA and supply chain management processes for public entities. These ToRs serve as guidelines, establish the minimum requirements for research projects as well as research costs to be covered by CATHSSETA.

9. CONCLUSION

This Research Agenda has been developed with the aim of addressing and supporting the eight NSDP outcomes and the nine NSDP Principles, in order to set up a credible mechanism for skills planning for the CATHSSETA sector. The purpose is both to strengthen the organisation's research capacity and to ensure that CATHSSETA serves as the repository of skills development knowledge in the sector. The achievement of these research priorities, through the approaches stated above, will enable CATHSSETA to be acknowledged as the credible authority that it rightfully is, in skills planning and development in the sector.

Annexure 4

Cover Letter



Postal Address
P.O. Box 1329, Rivonia,
2128, South Africa

Physical Address
01 Newtown Avenue,
Killarney, Johannesburg,
2193

Contact
Call Centre: 0860 100 221
Telephone: 011 217 0600
Fax: 011 783 7745



ANNEXURE 4: COVER LETTER

31 August 2020

Department of Higher Education and Training
SETA Support Directorate
123 Francis Baard Street
Pretoria

Attention: Ms Weziwe Sikaka
Acting Director: SETA Support and Learnerships

Dear Ms Sikaka

Re: CATHSSETA Sector Skills Plan Update 2021-22

We, the undersigned, on behalf of the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) submit to the Department of Higher Education and Training (DHET) the SETA's Final Sector Skills Plan (SSP) for the period 1 April 2021 to 31 March 2022. The SSP has been prepared in accordance with the DHET SSP framework and requirements guidelines for submission including the National Skills Development Plan (NSDP) 2030.

The shockwave of COVID-19 pandemic across the world has shocked many economies and governments across the globe as no one predicted or even prepared for it. Given the type of sub-sectors the CATHSSETA operates in, we find ourselves as one of the economic sectors hardest hit and most negatively affected by the COVID-19 pandemic.

Postal Address
P.O. Box 1329, Rivonia,
2128, South Africa

Physical Address
01 Newtown Avenue,
Killarney, Johannesburg,
2193

Contact
Call Centre: 0860 100 221
Telephone: 011 217 0600
Fax: 011 783 7745



All the six CATHSSETA sub-sectors have been negatively affected by the COVID-19 lockdown. The once booming tourism industry has come to a halt. Travel and Tourism has been forced to close shop for now. Sports and Recreation is barely surviving as all sporting activities have been either cancelled or postponed. The Arts and Culture sub-sector has also been negatively affected as all types of productions were halted until it is safe to do so. The conservation sector which relies heavily on sectors like travel and tourism and hospitality have also closed down. The hospitality sub-sector, which is our biggest sub-sector is also closed down until further notice. The Gaming and Lotteries sub-sector has seen a shift as the lockdown levels are eased in order to open the economy and casinos allowed to operate. Horseracing and other related activities except for the online gambling. President Ramaphosa announced the easing of lockdown level 3 to level 2 on 15 August 2020, the economy is widely opening for most sectors to operate especially fitness clubs and the selling of alcohol and tobacco products. This will affect the hospitality and tourism industry positively as restaurants will now be allowed to serve alcohol as the economy recovers slowly.

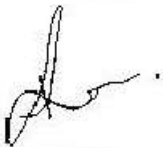
The CATHSSETA Continuous Improvement Plan (CIP); OFO Based Sectoral Priority (PIVOTAL) List; Research Agenda; and Mandatory Grant (MG) application data accompany this submission. The findings presented in this SSP were collected using improved data sources such as the Workplace Skills Plan data and secondary data sources such as DHET publications and PSET reports.

The SETA completed four internal studies in the previous financial year, namely Extent of Labour Union Participation in the Sector, the Organising Framework for Occupations (OFO) Baseline study, the effects of COVID-19 on the six CATHSSETA sub-sectors and Training Analysis Report.

Virtual consultative sessions with stakeholders took place in July and August 2020 as the DHET COVID-19 key informant survey was implemented with a sample of employers. These sessions have been used to validate findings highlighted in the draft SSP.

This final SSP has also taken into consideration the recommendations and comments received from the DHET SSP evaluation process.

Yours sincerely,

A handwritten signature in black ink, appearing to be "K. Lebaka", written over a horizontal line.

Keitumetse Lebaka (Ms)

Chief Executive Officer (CEO)

A handwritten signature in black ink, appearing to be "D. Ndlhovu", written over a horizontal line.

David Themba Ndlhovu (Mr)

Accounting Authority Chairperson

Tel: (011) 217 0600
Fax: (011) 783 7745

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