



RESEARCH ON THE IMPACT OF COVID-19 ON CATHSSETA SUB-SECTORS AND ITS IMPLICATIONS FOR SKILLS DEVELOPMENT

Final Research Report

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List of Acronyms

AMCEN	African Ministerial Conference on The Environment
AI	Artificial Intelligence
B&B	Bed and Breakfast
BASA	Business And Arts South Africa
CSO	Civil Society Organisation
CCI	Cultural And Creative Industry
CATHSSETA	Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority
DSAC	Department Of Sports, Arts and Culture
DBE	Department Of Basic Education
DFFE	Department Of Forestry, Fisheries and The Environment
DHET	Department Of Higher Education and Training
DSI	Department Of Science and Innovation
DSBD	Department Of Small Business Development
DBSA	Development Bank of Southern Africa
ERRP	Economic Reconstruction and Recovery Plan
EWT	Endangered Wildlife Trust
GDP	Gross Domestic Product
GGR	Gross Gaming Revenues
IDR	Indonesian Rupiah
ICT	Information and Communications Technology
IT	Information Technology
ILO	International Labour Organisation
IUCN	International Union for Conservation of Nature

MS	Microsoft
MGE	Mzansi Golden Economy
NQF	National Qualifications Framework
NSDP	National Skills Development Plan
NSDS	National Skills Development Strategy
NSF	National Skills Fund
PCR	Polymerase Chain Reaction
PSET	Post School Education and Training
PESP	Presidential Employment Stimulus Programme
PFMA	Public Finance Management Act
RPC	Regional Performance Centres
SSP	Sector Skills Plans
SMS	Short Message Service
SDF	Skills Development Facilitators
SEDA	Small Enterprise Development Agency
SMME	Small, Medium and Micro Enterprises
SA	South Africa
SACO	South African Cultural Observatory
SANBI	South African National Biodiversity Institute
SANParks	South African National Parks
TVET	Technical And Vocational Education and Training
TERS	Temporary Employer/Employee Relief Scheme
UFC	Ultimate Fighting Championship
UIF	Unemployment Insurance Fund
UK	United Kingdom

UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United World Tourism Organisation
WIL	Work Integrated Learning
WHO	World Health Organisation
WSP	Workplace Skills Plan

1 Executive Summary

This report presents the findings and recommendations from the research project on the impact of COVID-19 on the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (“CATHSSETA”) sub-sectors and its implications for skills development (“The Project”).

1.1 Project Background and Objectives

The COVID-19 pandemic resulted in the South African government enforcing a hard lockdown on the nation in March 2020. The pandemic and subsequent lockdown had adverse effects on the economy, including on service delivery by entities within the CATHSSETA sub-sectors. Given that these businesses rely primarily on physical interaction, travel, close contact (in the form of sports) and attendance at events, the sub-sectors have been some of the worst hit by the COVID-19 pandemic.

CATHSSETA sub-sectors constitute a large share of the overall number of Small, Medium and Micro Enterprises (“SMMEs”) in South Africa. SMMEs, in turn, contribute to 42% of the country’s Gross Domestic Product (“GDP”), highlighting the significant role they play in economic development (CATHSSETA, 2019). The majority of small businesses, however, did not have the financial capacity to deal with the economic and financial challenges faced as a result of the restrictions imposed during the COVID-19 pandemic. Research found that during the first five months of the national lockdown in 2020, existing debts and a lack of cash reserves resulted in the closure of 42.7% of small businesses in South Africa (BusinessTech, 2020). It was, therefore, critical to understand the role of SMMEs and their contribution to the overall GDP of the economy, as well as their access to economic and skills development, and how they adapted to the effects of the pandemic.

Consequently, in order to provide further insight into how SMMEs have dealt with the pandemic and the skills emerging as a result of the pandemic, this research study was conducted to unpack the impact of COVID-19 on CATHSSETA’s sub-sectors, their economic performance, and the implications on skills development.

Some of the key objectives of the study included determining and analysing the short to medium term effects of COVID-19 on businesses, including the impact on economic performance and related market trends and the recommended recovery plans for the sector; identifying emerging trends in education and training; identifying the impact of COVID-19 on existing skills; analysing access to education and training opportunities during and post COVID-19; assessing the applicability of the Economic Reconstruction and Recovery Plan (“ERRP”) and the Economic Recovery Skills Strategy; and projecting how vaccination will affect sub-sectors with strong linkages in international markets.

1.2 Research Methodology

The sections below illustrate the process followed whilst collecting, capturing, and analysing data for the Project on the impact of COVID-19 on CATHSSETA’s sub-sectors.

1.2.1 Conceptual Approach

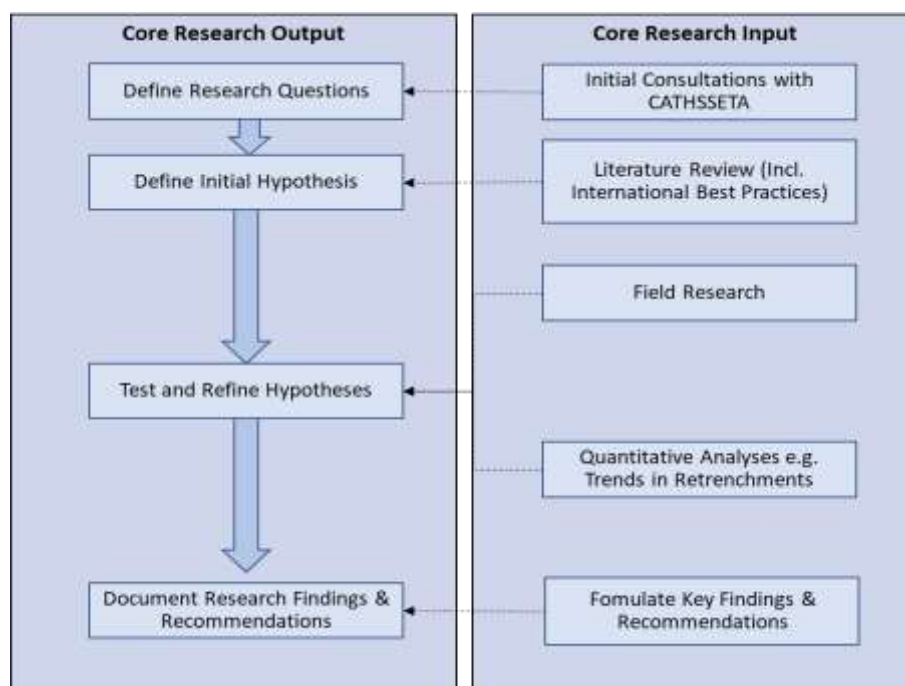
The approach adopted for this Project was premised on establishing fundamental principles for the Research Topic. These principles included:

- Defining the specific research questions to be investigated for the topic
- Defining initial hypotheses through desktop research., such as, “The impact of COVID-19 on retrenchments within relevant sub-sectors.”
- Developing recommendations to assist CATHSSETA to play a strategic role in guiding the relevant sub-sectors in navigating the emerging developments within the sector landscape, given the social and economic impact of COVID-19.

The research approach involved both qualitative and quantitative data sources. This was to ensure the development of key findings and recommendations that were sound and could be defended.

The above is summarised by the figure below.

Figure 1-1: Conceptual Approach



1.2.2 Summary of Research Undertaken

The research undertaken for this project included desk-based research and field research. The desk-based research included a review of relevant literature regarding the impact of COVID-19 on CATHSSETA sub-sectors, including the impact of COVID-19 on occupational patterns and skills development as well as the recovery measures implemented to assist the sub-sectors mitigate the impact of the pandemic. Field research undertaken included focus groups, in-depth interviews, and online surveys.

The table below provides an overview of the field research undertaken during the course of the Project.

Table 1-1: Field Research Undertaken

Stakeholder Type	Number of Planned Interviews, Focus Groups and Surveys	Number of Completed Interviews, Focus Groups and Surveys
In-depth Interviews		
Employers	12	13
Skills Development Facilitators ("SDFs")	6	7
Training Providers	3	3
Industry Experts	3	3
Total Interviews	24	26
Focus Groups		
Employers	1 with 12 participants	1 with 6 participants
SDFs & Training Providers	1 with 12 participants	1 with 8 participants
Learners	1 with 12 participants	1 with 14 participants
Total Focus Groups	3 with 36 participants	3 with 27 participants
Online Surveys		
Employers	379	160
SDFS		148
Training Providers		36
Learners		289
Total Surveys	379	633
Overall Total	439	686

Survey links were distributed to the entire database of relevant stakeholders via email and through the use of bulk SMSes. Overall, a total of 686 interviews, focus groups and surveys were conducted.

1.3 How to Read and Interpret Survey Results

As explained in Section 1.2 quantitative results were obtained through online surveys. The survey questions were predominantly based on a Likert scale. An example of a Likert scale used in this report is the scale used to measure the extent of a state, ranging from “not at all” to “extensively” (see below), for instance, the extent to which respondents believed that COVID-19 negatively affected businesses in the sub-sector(s) in which their businesses operate.

Table 1-2: Likert Scale

Likert Scales of Extent				
Not at All	Minimally	Significantly	Substantially	Extensively

The scale provided in the table above, represents the different levels of extent that a respondent may select to indicate their opinion or attitude towards the subject matter, in this instance, the extent to which they were impacted by the COVID-19 pandemic. If denoted on an ordinal measurement scale, ‘Not at All’ would represent 1 and ‘Minimally’ would represent 2. ‘Significantly’ would represent 3, while ‘Substantially’ would represent 4. ‘Extensively’, would represent a numerical value of 5 (Derrington, 2022). The use of an ordinal scale allows for the ordering of response options without establishing the degree of variation between them (QuestionPro, 2022). Instead, the scale indicates that each response option denotes an extent greater than the previous option on the scale. That is to say, ‘Substantially’ denotes an extent greater than ‘Significantly’, whilst ‘Extensively’ denotes the greatest impact or strongest perception.

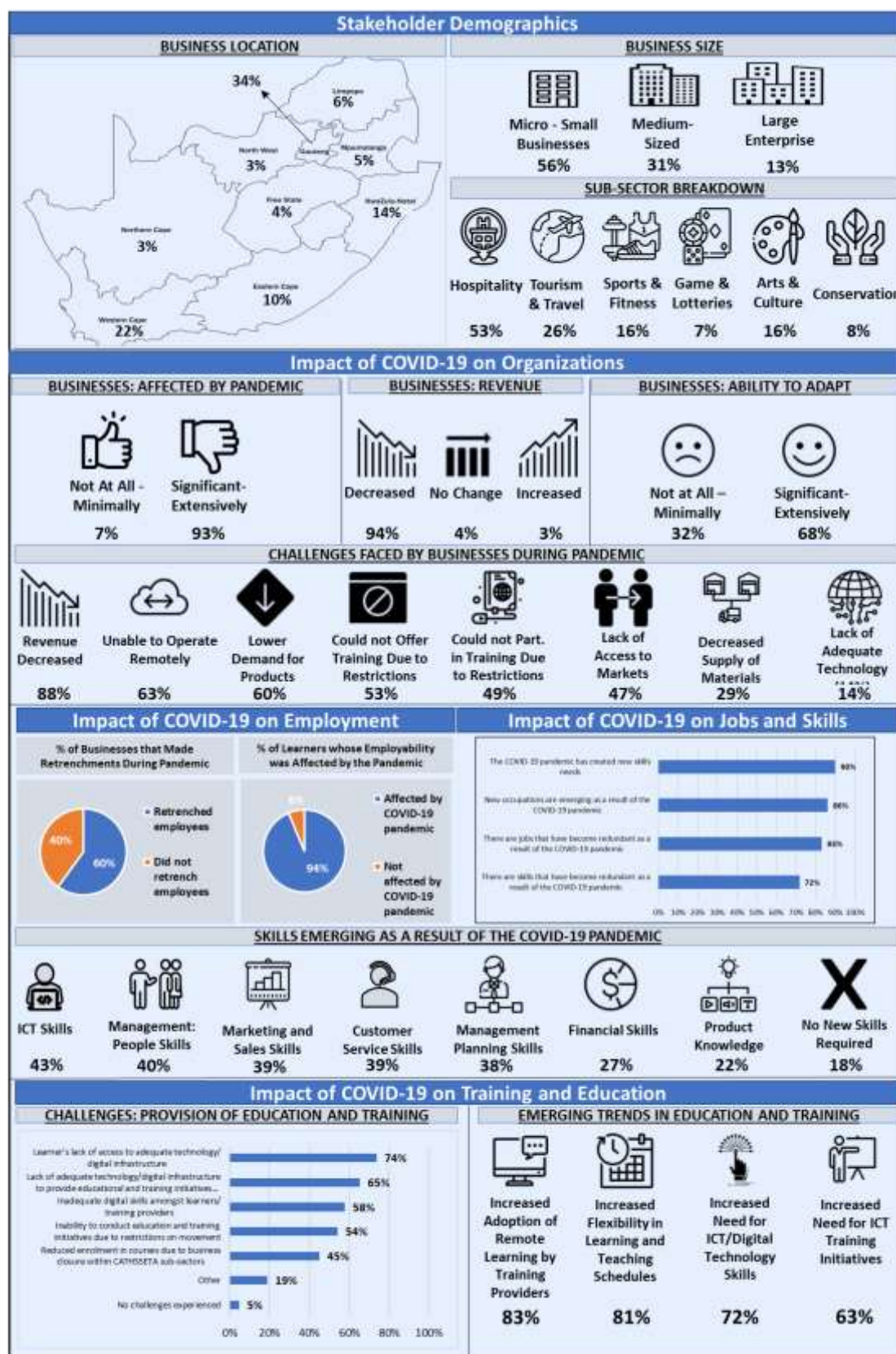
The majority of the graphs presented throughout this report measured the percentage of respondents who selected a specific option/s over the total number of respondents for that question. Graphs were presented as a sum of the negative responses compared to the sum of the positive responses (i.e. the sum of “Not at all” to “Minimally” compared to the sum of “Significantly”, “Substantially” and “Extensively”).

In instances where respondents were requested to indicate the extent to which they agree with a statement, a Likert scale ranging from “Strongly disagree” to “Strongly agree” was applied, for instance, the extent to which stakeholders believed that training providers were adequately capacitated to provide training on emerging skills. Results were presented as the sum of positive responses (i.e. the sum of ‘Neither agree nor disagree’, ‘Agree’, and ‘Strongly Agree’).

1.4 Research Findings

The dashboard below provides a high level overview of the findings from the project. The dashboard provides an overview of the impact of COVID-19 on businesses and employment, as well as on jobs and skills. Additionally, it looks at the access to and provision of education and training during the pandemic.

Figure 1-2: Summary Dashboard



1.4.1 Stakeholder Demographics

Section 5.1 provides an overview of the demographics of the stakeholders that participated in the survey. The data collected included representation from employers/businesses, training providers, SDFs and learners across the six CATHSSETA sub-sectors, as well as the nine provinces of South Africa. A large proportion of respondents (34%) were from the Gauteng province. The sub-sector with the highest representation across the different stakeholder types was the Hospitality sub-sector, with training providers, employers and SDFs representing 50%, 56% and 52% of respondents, respectively.

With regard to the learners that participated in the survey, 77% indicated that they were enrolled in CATHSSETA-funded learning programmes at the time of the survey, with the majority (53%) of these learners being enrolled in learnerships. Additionally, the majority of learners (69%) indicated that they were unemployed.

The size of the businesses that were surveyed was determined based on the number of employees in the business. It was noted that 56% were classified as micro to small enterprises (up to 50 employees), 31% were classified as medium-sized enterprises (51 – 250 employees) and 13% were classified as large enterprise (more than 250 employees). Among these businesses, it was noted that 45% were operating normally, 51% were operating at reduced capacity, and only 1% were temporarily closed. A sub-sector analysis of the results indicated that the Gaming and Lotteries sub-sector constituted the largest proportion of respondents (58%) that indicated that their businesses were operating at reduced capacity. Furthermore, it was found that the Tourism and Travel Services sub-sector was the only sub-sector in which respondents (8%) indicated that their businesses had temporarily closed.

1.4.2 Impact of COVID-19 on Businesses

Section 5.2 explores the impact of the COVID-19 pandemic on businesses within the CATHSSETA sub-sectors. It provides an overview of the impact that the pandemic had on businesses, including the impact on revenue and on remote working. The study found that, overall, 93% of businesses were negatively impacted by the pandemic, with 94% of businesses indicating that their revenues decreased as a result of the COVID-19 pandemic. A sub-sector analysis of the survey data indicated that 100% of businesses in the Conservation sub-sector experienced a decrease in revenue.

With regard to remote working, the study found that the majority of businesses (67%) had less than 5% of their workforce working remotely. Additionally, the majority of businesses (76%) were of the view that post the COVID-19 pandemic, less than 5% of their workforce would continue to operate remotely.

In order to gain a deeper understanding of the impact of the pandemic on businesses, respondents were requested to indicate the benefits and challenges that their businesses experienced as a result of the COVID-19 pandemic. It was found that 58% of businesses did not experience any benefits. However, those that did, cited benefits such as reduced operational costs that resulted in increased savings; an increase in the productivity levels of employees; and improvement in employees' work-life balance. With regard to challenges, it was found that 63% of businesses faced

challenges such as the inability to operate remotely, whilst 60% faced decreased demand for products offered.

Despite the challenges faced, 68% of stakeholders noted that they were able to significantly to extensively adapt to the pandemic, with 57% of respondents indicating that they received support from the government and/or the private sector. 72% of businesses indicated that this support took the form of financial support. Furthermore, respondents were requested to indicate how long they believed it would take businesses in the CATHSSETA sub-sectors to recover from the impact of the pandemic. It was found that 56% of respondents were of the view that it would take more than 18 months for their businesses to recover from the COVID-19 pandemic. Additionally, 73% of respondents indicated that key to recovery would be increased access to funding opportunities.

1.4.3 Impact of COVID-19 on Employment

Section 5.3 provides an overview of the impact of COVID-19 on employment within the CATHSSETA sub-sectors, as well the impact on learners' ability to find employment.

The study found that 60% of surveyed businesses retrenched employees as a result of the COVID-19 pandemic, with 36% indicating that they retrenched between 6% and 25% of their workforce. It was found that the majority of businesses (83%) in the Tourism and Travel Services sub-sector retrenched employees as a result of the pandemic, followed by 75% of businesses in the Sports, Recreation and Fitness sub-sector. On the other hand, 89% of respondents indicated that their businesses did not plan to make further retrenchments in the short to medium term, noting that they were not experiencing financial difficulties at the time of the study and were optimistic about their growth prospects. It was found that only businesses in the Sports, Recreation and Fitness (25%) Tourism and Travel Services (17%), Gaming and Lotteries (9%) and Hospitality (9%) sub-sectors planned on retrenching employees in the short to medium term.

In addition to the above, it was found that the majority of learners (94%) indicated that their ability to find employment had been affected by the pandemic. Some learners were of the view that they were not able to find employment due to a lack of job opportunities as a result of businesses closing or retrenching employees during the pandemic.

1.4.4 Impact of COVID-19 on Jobs and Skills

Section 5.4 provides insights into the impact of COVID-19 on the job and skills market, existing skills gaps, as well as skills that are emerging within the CATHSSETA sub-sectors, as a result of the COVID-19 pandemic.

It was found that the majority of respondents were of the view that new occupations and skills have emerged as a result of the COVID-19 pandemic. Some of the emerging skills that were identified by respondents included ICT skills (43%), people skills (40%), and marketing and sales skills (39%). It was found that the COVID-19 pandemic, coupled with the Fourth Industrial Revolution ("4IR"), has resulted in the need for ICT skills and advanced technological knowledge within businesses in the CATHSSETA sub-sectors. The increased adoption of technology and the need for

digital upskilling were identified as change drivers that may influence skills development within the sector. In addition to the above, the section explores some of the skills gaps that have been exacerbated as a result of the COVID-19 pandemic. Respondents were of the view that some of the skills gaps that have been exacerbated by the COVID-19 pandemic include customer service (42%), emotional intelligence (38%), and communication skills (31%).

1.4.5 The Impact of COVID-19 on Training and Educational Initiatives

Section 5.5 explores the impact of COVID-19 on training and educational initiatives. It provides an overview of the impact COVID-19 had on the ability of businesses to provide training; the challenges faced by training providers when providing training, the challenges faced by learners when accessing education and training; as well as the extent to which learners and training providers were able to adapt to the challenges.

The study found that 61% of respondents were unable to provide training during the pandemic due to challenges such as learners' lack of access to adequate technology/digital infrastructure and inadequate digital skills amongst learners/training providers. The respondents indicated that some of the further challenges they experienced included the lack of adequate technology/digital infrastructure to provide educational and training initiatives online (65%).

Additionally, learners were requested to indicate the challenges they experienced when attempting to access education and training. Some of the challenges that were reported included restrictions on movement (65%) and a lack of adequate technology/digital infrastructure (33%).

In addition to the above, the section provides findings related to the emerging trends in education and training during the COVID-19 pandemic. It was found that 81% of respondents observed an increased flexibility in learning/teaching schedules, while 63% observed an increased need for ICT training initiatives.

1.4.6 Projected Impact of Green Pass Certificates on Businesses

Section 5.6 provides the expected impact that Green Pass Certificates will have on businesses within CATHSSETA sub-sectors. This impact was determined using an economic forecasting model.

The forecast indicates that the implementation of Green Pass Certificates is expected to have a positive impact on businesses within the Tourism and Travel Services, Gaming and Lotteries and Sports, Recreation and Fitness sub-sectors, with increases of 30%, 11% and 7% in customers visiting these businesses anticipated, respectively. The Arts, Culture and Heritage sub-sector is expected to experience a 3% increase in customers. Contrastingly, the forecast indicates that the implementation of Green Pass Certificates will result in a 28% decrease in customers in the Hospitality sub-sector, while a decrease of 3% is anticipated in the Conservation sub-sector.

1.5 Recommendations

Section 6 details the key findings identified from the Project as well as the recommendations related to these key findings. Positive key findings, framed as lessons learned, are also included in this section.

1.5.1 Lessons Learned

Lessons learned highlight key positive practices/ positive findings across the various areas of focus of the study. Various strategies that were adopted by stakeholders in response to the COVID-19 pandemic are provided in this section. For example it was found that businesses from the Hospitality sub-sector were able to adapt to the pandemic by providing training on COVID-19 protocols to staff, following protocols and restructuring of their restaurants to meet social distancing requirements. These findings along with the recommendations may be used to inform support measures that are offered to businesses across the CATHSSETA sub-sectors.

Table 1-3: Lessons Learned

Focus Area	Lesson Learned
Benefits Experienced as a Result of the COVID-19 Pandemic	Organisations that experienced benefits as a result of the COVID-19 pandemic cited benefits such as reduced operational costs that resulted in increased savings; an increase in the productivity levels of employees; and an improvement in employees' work-life balance
	It was noted that as a result of the pandemic, some organisations had the opportunity to explore innovative avenues to conduct their business activities more efficiently in the long run. For instance, several training institutions developed and introduced online learning platforms to provide access to their learners
	Some organisations that experienced employee resignations during the pandemic noted that fewer staff were required to conduct operations such as finance related duties, thus identifying inefficiencies that the business was previously unaware of and reducing company costs
Recovering from the Impact of COVID-19	Respondents who believed that their businesses would be able to recover from the challenges faced during the pandemic, in the short term, indicated that they had put measures in place to facilitate this recovery. Examples of the measures put in place included reducing their booking rates to encourage travellers to visit their businesses once lockdown restrictions were lifted.
	Key support that was provided in order to assist businesses recover from the pandemic included financial relief such as UIF, TERS, and bank loans, as well as the relaxation of regulations, such as those regarding the renewal of licences for liquor traders.
Adapting to Challenges Caused by the	It was found that businesses from the Hospitality sub-sector were able to adapt to the pandemic by providing training on COVID-19 protocols to staff, following protocols and restructuring their restaurants to meet social distancing requirements.

Focus Area	Lesson Learned
COVID-19 Pandemic	It was found that other businesses were able to adapt to the pandemic by modifying their business models. Respondents from the Arts, Culture & Heritage sub-sector indicated that they hosted outdoor and virtual events in an attempt to adapt to the pandemic, while businesses from the Gaming and Lotteries sub-sector were able to adapt by shifting to online platforms for the placement of bets and playing of lotteries. Businesses from the Tourism and Travel Services sub-sector were able to adapt by targeting domestic travellers instead of international ones
Impact of COVID-19 on Retrenchments	Some stakeholders, such as those from the Hospitality sub-sector were of the view that no additional retrenchments would be required in the short to medium term as they are optimistic about performance and are not currently experiencing financial challenges.
	It was found that none of the businesses that were surveyed planned to retrench more than 50% of their employees in the short to medium term. This is an improvement from the 22% of businesses that retrenched more than half of staff during the pandemic.
Impact of COVID-19 on Ability to Provide Training	Training providers noted that in order to accommodate learners who did not have access to technology/digital infrastructure, printed learning material was provided. In addition, support was made available to learners through communication platforms such as WhatsApp.
Training on New Emerging Skills	A representative from a training institution noted that their organisation conducted research, planning and established policies that would enable them and ensure they were equipped to conduct training on emerging skills
Impact of COVID-19 on the Access to Education and Training	It was found that some learners were able to adapt to the challenges faced while accessing education and training during the COVID-19 pandemic, due to measures that were put in place to assist them. These included being assigned mentors to provide assistance with the use of digital platforms and establishing a helpdesk to offer support on IT related queries
Emerging Trends in Education and Training	It was found that some organisations supplemented their online training initiatives with in-person training in order to accommodate trainees who did not have the resources to participate in online training. Face-to-face training was conducted at least once per week and course material was printed out and distributed to trainees

1.5.2 Recommendations

Section 6.2 provides recommendations based on the key findings stemming from this project. Key findings and recommendations are grouped according to key emerging themes .

The themes that emerged from the study included:

- The inability of businesses to operate due to COVID-19 lockdown restrictions

- Perceived challenges in finding employment amongst learners
- Loss of revenue and a lack of customers as a result of the COVID-19 restrictions
- Employee retrenchments as a result of the COVID-19 pandemic
- Inadequate ICT infrastructure and knowledge regarding how to use digital technologies, impacting the access to and provision of training; and business operations
- The key support required by businesses as a result of the COVID-19 pandemic (e.g. financial support) and the support required by businesses in order to recover from the effects of the pandemic
- Increased demand for digital skills and the adoption of online technology
- Perceived lack of available funding; and financial constraints impeding the ability to provide training
- Emerging skills that were identified as a result of the COVID-19 pandemic (including; risk management, strategic planning, ICT skills, financial skills, marketing and sales skills, disaster recovery, and business rescue)
- The impact of Green Pass Certificates on CATHSSETA Sub-sectors
- Stakeholders' lack of knowledge with regard to the ERRP

The recommendations for the abovementioned emerging themes are presented in the Section 6.2.

2 Introduction

This report presents the findings and recommendations from the research study conducted to analyse the impact of COVID-19 on the CATHSSETA sub-sectors and its implications for skills development (“the Project” or “the Study”).

The report begins by providing an overview of the project background and approach. This is followed by a description of the research methodology adopted for the study and a description of the challenges that were encountered during the project.

Primary and secondary data were analysed to offer the insights contained in this report. Data collected and analysed included both quantitative and qualitative data. Qualitative data was sourced through comments made by stakeholders in surveys, in-depth interviews and focus groups, whilst quantitative data was based on survey results.

The following table provides an outline of the sections contained in this document.

Table 2-1: Section Outline

Section	Content	Description
Section 2	Introduction	This section provides the background to the project, as well as the context within which it was conducted. Additionally, it describes the scope and objectives of the project.
Section 3	Research Methodology	This section provides a description of how the project was completed, highlighting the research that was undertaken and the key limitations experienced.
Section 4	Literature Review	This section provides an overview of the major themes identified from the desk-based research.
Section 5	Research Findings	This section presents the overall findings from the primary research and the key findings across each focus area.
Section 6	Key Findings and Recommendations	This section highlights the positive practices, key findings, and recommendations that CATHSSETA may consider going forward.
Section 7	Identified Funding/Training Opportunities and Emerging Skills	This section provides an overview of the funding/training opportunities as well as the emerging skills identified through the research project.
Section 8	Conclusion	This section provides a conclusion to the findings and the report.

2.1 CATHSSETA Overview

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 1 of 1999 as amended) and is accountable to the National Department of Higher Education and Training (“DHET”). CATHSSETA conducts its activities within the following six sub-sectors (CATHSSETA, 2021):

- **Arts, Culture and Heritage**

The Arts, Culture and Heritage sub-sector encompasses the production of arts, crafts, the dramatic arts, entertainment, the preservation of historical sites and buildings, the management and operation of museums, cultural and heritage activities, music and theatre, as well as arts councils and their activities.

- **Conservation**

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

- **Gaming and Lotteries**

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

- **Hospitality**

The Hospitality sub-sector comprises of hotels, motels, guest houses and bed and breakfasts, the management and operation of game lodges, caravan parks and camping sites, restaurants, fast food establishments, take-away restaurants, caterers and catering services, timeshares and bioscope cafes.

- **Sport, Recreation and Fitness**

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

- **Tourism and Travel Services**

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

The table below provides an overview of the number of entities that were registered with CATHSSETA per sub-sector as of 2021 (CATHSSETA, 2021).

Table 2-2: Number of Entities Registered with CATHSSETA

Sub-sector	Small (1 - 49)	Medium (50 – 149)	Large (150+)	Number of Entities Registered with CATHSSETA
Hospitality	26 288	1010	240	27538
Tourism and Travel Services	4565	70	45	4680
Sport, Recreation and Fitness	3488	78	26	3592
Arts, Culture and Heritage	1888	42	6	1936
Conservation	1809	37	8	1854
Gaming & Lotteries	1136	87	140	1363
Total	39174	1324	465	40963

(CATHSSETA, 2021)

Within these sub-sectors, CATHSSETA is responsible for the:

- Development of a Sector Skills Plans (“SSP”) within the framework of the NSDP
- Implementation of the SSP
- Development and administration of Learnerships
- Supporting the implementation of the National Qualifications Framework (“NQF”)
- Conducting Quality Assurance of sector learning interventions
- Disbursement of levies collected from employers in their sector

2.2 Project Background

The COVID-19 pandemic resulted in the South African government going into a hard lockdown in March 2020. The pandemic and subsequent lockdown had adverse effects on the economy, including service delivery by entities under the CATHSSETA sub-sectors. Some of the challenges faced by businesses during the pandemic included closures (permanent and temporary), job losses, reduced revenue, and repurposing of businesses to ensure survival. Given that businesses in the CATHSSETA sectors rely primarily on physical interaction, travel, close contact (in the form of sports) and attendance at events, the sub-sectors have been some of the worst hit by the COVID-19 pandemic.

Small, Medium and Micro Enterprises (“SMMEs”) in South Africa contribute to 42% of the country’s Gross Domestic Product (“GDP”), highlighting the significant role they play in economic development (CATHSSETA, 2019). Furthermore, the CATHSSETA sectors constitute a large share of the overall number of SMMEs in South Africa, indicating that SMMEs in the CATHSSETA sectors contribute largely to the overall GDP of the economy. However, the majority of small businesses did not have the

financial capacity to deal with the economic and financial challenges faced as a result of the restrictions imposed during the COVID-19 pandemic. Research found that during the first five months of the national lockdown in 2020, existing debts and a lack of cash reserves resulted in the closure of 42.7% of small businesses in South Africa (BusinessTech , 2020). It is, therefore, critical to understand the role of SMMEs and their contribution to the overall GDP of the economy, as well as their access to economic and skills development, and how they adapted to the effects of the pandemic.

Demand and supply of skills within the CATHSSETA sector were also greatly impacted by the pandemic. According to CATHSSETA's Sector Skills Plan (2019), the SETA had already identified 4IR, globalisation, legislative considerations and the green economy as key skills change drivers within its sub-sectors, however, it is believed that this list of key skills change drivers should be revised as a result of the COVID-19 period, as it has resulted in an overall increase in demand for new skills such as ICT Management, and mobile technologies.

Consequently, in order to provide further insight into how SMMEs have dealt with the pandemic and the skills emerging as a result of the pandemic, this research study was commissioned to unpack the impact of COVID-19 on CATHSSETA's sub-sectors, their economic performance, and the implications on skills development.

2.2.1 Project Objectives

The objectives of this research study included:

- Determining and analysing the short to medium term effects of COVID-19 on the sector and the recommended recovery plans within each sub-sector
- Analysing the impact of COVID-19 on economic performance and related labour market trends in the sector
- Identifying developing/emerging trends in education and training as a result of COVID-19
- Understanding the impact of COVID-19 on SMMEs in the sector
- Analysing the impact in relation to existing skills and possible skills gaps in the sector
- Assessing the applicability of the ERRP, and the Economic Recovery Skills Strategy in response to COVID-19 and the implementation progress in relation to CATHSSETA and its sub-sectors
- Analysing short to medium term intended and unintended consequences of resources and relief funds allocated to assist the sector
- Analysing access to education and training opportunities during and post COVID-19; and projections on how vaccination will affect sub-sectors with strong linkages in international markets

2.2.1.1 Key Questions

The table below provides an overview of the key research questions answered by this research, as well as the sections in which these questions have been addressed.

Table 2-3: Key Research Questions

Research Questions	Research Findings	Sections
How has COVID-19 affected CATHSSETA sub-sectors?	The study found that the majority of businesses across CATHSSETA sub-sectors faced challenges such as loss of revenue; the inability to operate due to restrictions on movement; employee retrenchments; and the inability to provide training during the COVID-19 pandemic.	4.2 & 5.2 – 5.4
What are the short to medium term effects of COVID-19 on the sectors?	The study found that the COVID-19 pandemic necessitated businesses to adapt their operating models in order to survive the pandemic. This included the shift to online platforms within both businesses and education and training initiatives.	4.2 & 5.2 – 5.4
How has COVID-19 affected SMMEs operating in CATHSSETA sub-sectors?	It was found that the majority of businesses had to cease/pause operations as a result of the COVID-19 pandemic. Existing debts and a lack of cash reserves resulted in the closure of 42.7% of small businesses in South Africa. The restrictions on movement that were in place during the COVID-19 lockdown led to some businesses working remotely.	4.2 & 5.2 – 5.5.2
What are the adaptive requirements needed by the CATHSSETA sub-sectors to recover from COVID-19?	It was found that businesses across CATHSSETA sub-sectors required increased access to funding opportunities and assistance in order to transition to online training to adapt to and recover from the COVID-19 pandemic.	5.2.5
What is the progress on the implementation of sub-sector recovery plans?	At the time of compiling this report, not all CATHSSETA sub-sectors had developed sector specific recovery plans. The recovery plans that were identified included those for the Conservation, Sport, Recreation and Fitness, Arts, Culture and Heritage, and Tourism and Travel Services sub-sectors.	4.4
How can the sector and CATHSSETA implement the Economic Reconstruction and Recovery Plan (“ERRP”) to revive CATHSSETA sub-sectors?	<p>The study found that the successful implementation of the ERRP would require the participation of various organisations across both the public and private sector and that some key interventions, would need to be put in place for the ERRP to be implemented successfully. These include:</p> <ul style="list-style-type: none"> • Infrastructure Development and Delivery • Localisation of Industries • Energy Security • Green Economy Interventions • Strengthening Food Security 	4.4 & 6.2

Research Questions	Research Findings	Sections
	The study found that stakeholders within the CATHSSETA sub-sectors appeared to have limited to no knowledge of the ERRP. It was therefore, recommended that CATHSSETA create awareness of the ERRP amongst its stakeholders to encourage businesses to develop an understanding of the ERRP and understand the role they can play in order to support the recovery of the economy.	
How have occupational patterns and skills provision changed as a result of emerging trends induced by COVID-19 for each of the sub-sectors?	Research identified several factors that contributed to the increase in unemployment during the COVID-19 pandemic. It was found that some companies were unable to undergo the digital transition to remote working as their business model was dependent on physical interactions with customers. Additionally, it was found that the shift to online learning during the pandemic, coupled with the Fourth Industrial Revolution, resulted in an increased demand for digital skills. However, the adoption of these digital technologies and the automation of business activities has resulted in other jobs and skills becoming redundant. It was also found that the COVID-19 has resulted in the emergence of certain jobs and skills that would enable companies to assess the impact of future risks on their businesses, such as risk management, strategic planning and decision making.	4.3; 5.3 - 5.5
Using an economic forecasting model, what impact will green pass vaccination have on CATHSSETA sub-sectors?	The economic forecasting model on the projected impact of Green Pass Certificates indicated that the implementation of Green Pass Certificates is anticipated to have a negative impact on the Hospitality and Conservation sub-sectors. It was found that the implementation of Green Pass Certificates would result in a decrease in the number of customers that visit establishments in these sub-sectors (e.g., restaurants, hotels, wildlife parks, zoos, etc.) and consequently result in a decrease in the economic performance of these sub-sectors. However, sub-sectors such as Sports, Recreation and Fitness; Gaming and Lotteries; Arts, Culture and Heritage and Tourism and Travel Services are expected to benefit from the implementation of the Green Pass Certificates, with an expected increase in the number of customers in these sub-sectors and ultimately an increase in GDP contribution.	5.6
How has COVID-19 affected education and training provision in the CATHSSETA sub-sectors?	As a result of the restrictions on movement that were in place during the COVID-19 pandemic, the majority of education and training initiatives were accessed online. The transition to online learning resulted in training providers facing challenges while providing education and training. These included learners' and	4.3. & 5.5

Research Questions	Research Findings	Sections
	training providers' lack of access to digital equipment, high data costs, learners' low levels of competency with regard to digital skills.	
What are the skills implications of COVID-19 on CATHSSETA sub-sectors?	<p>The restrictions on movement necessitated a shift to online learning to ensure the continuation of skills development within South Africa. However, skills provision was impacted by a lack of digital infrastructure to conduct or participate in online training; and a lack of funding for training institutions. It was found that there was a need to upskill lecturers on online teaching during the COVID-19 pandemic. Furthermore, training providers had to adapt their programmes in order to transition to online platforms.</p> <p>It was found that several skills were identified as emerging across the different sub-sectors as a result of the pandemic. Some of the skills included skills such as ICT skills, financial skills, marketing and sales skills, disaster recovery and business rescue skills.</p>	4.3 & 5.4
What are the short to medium term intended and unintended consequences of resources and relief funds allocated to assist the sector?	The majority of respondents in the study noted that they received financial support and during the pandemic. These allowed some businesses to settle salary payments for their employees and stay operational during the COVID-19 pandemic. It was noted that limited unintended benefits were realised during the COVID-19 pandemic.	5.2

2.2.2 Project Scope

The scope of work included the below areas of research, which were aligned to the aims and objectives of the project:

- Exploring and documenting the economic and social impact of COVID-19 on the CATHSSETA sub-sectors
- Examining the overall impact of COVID-19 on CATHSSETA's sub-sectors and its implications for skills development
- Appraising all CATHSSETA strategy documents and all relevant policy documents
- Identifying gaps between the results of the study and CATHSSETA's strategy, including recommendations on how identified gaps can be closed.

3 Research Methodology

The sections below illustrate the process followed whilst collecting, capturing, and analysing data for the research on the impact of COVID-19 on CATHSSETA sub-sectors.

3.1 Conceptual Approach

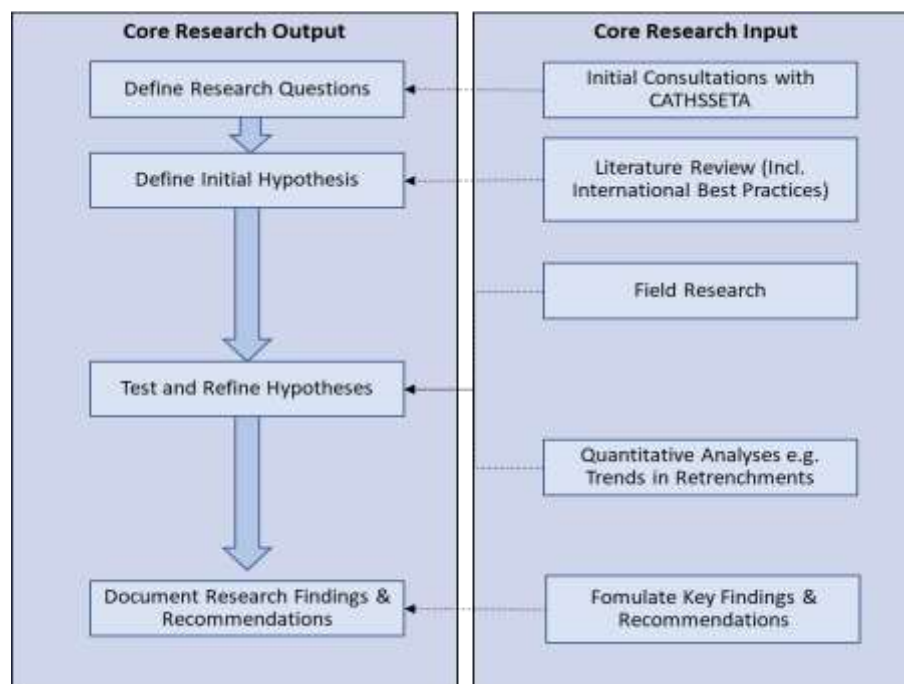
The approach adopted for this project was premised on establishing fundamental principles for the Research Topic. These principles included:

- Defining the specific research questions to be investigated for the topic
- Defining initial hypotheses through desktop research, such as, “The impact of COVID-19 on retrenchments within relevant sub-sectors.”
- Developing recommendations to assist CATHSSETA play a strategic role in guiding the relevant sub-sectors in navigating the emerging developments within the sector landscape, given the social and economic impact of COVID-19.

The research approach involved both qualitative and quantitative data sources. This was to ensure the development of key findings and recommendations that were sound and could be defended.

The above is summarised by the figure below.

Figure 3-1: Conceptual Approach



3.2 Sampling Approach

The following section provides an overview of the sampling methodology that was adopted for the data collection phase of the study.

3.2.1 Sampling Size and Confidence Levels

The population size for a study is typically the number of participants or units in an area. Contrastingly, the sample size is the group selected to be surveyed from the population. Random sampling ensures each unit or participant has an equal chance of being selected to form the sample size. A random sampling approach was adopted in order to select the sample to be surveyed as part of the study.

The following formula was used to increase confidence levels while simultaneously ensuring a decreased margin of error.

$$s = \frac{X^2 NP(1 - P)}{ME^2(N - 1) + X^2 P(1 - P)}$$

Where:

s = Sample Size

X^2 = Chi-square value at 1 degree of freedom and relevant confidence level

N = Population Size

P = Population Portion (Assumed to be 0.6)

ME = Margin of Error Percentage

The table below provides an indication of the sample size that was determined for this Project, based on a 95% confidence level and 5% margin of error.

Table 3-1: Required Sample Size

Stakeholder Types	Population Size	Representative Sample	Confidence Interval	Margin Error
Businesses, Training Providers, SDFs and Learners	26 153	379	95%	5%

As can be seen in the table above, the contact databases that were provided by CATHSSETA consisted of a total population of 26 153 stakeholders. At a 95% level of confidence and 5% margin of error, a sample size of 379 stakeholders was determined.

3.2.2 Sampling Methodology

Simple random sampling and purposive sampling were utilised to select the sample to be used in this study. In simple random sampling, each person or organisation, also known as a unit, has an equal chance of being selected from the population size. For this reason, this sampling method was used when determining a sample database for telephonic interviews and focus groups. Purposive sampling, on the other hand, is a form of non-probability sampling in which researchers rely on their own judgment and knowledge when selecting members of the population to participate in their study. This

sampling method was adopted when selecting samples to obtain additional response from specific CATHSSETA sub-sectors.

The above-mentioned sampling methods have numerous advantages in data collection. With simple random sampling, the typical aim is to reduce biases, resulting in a highly representative sample being drawn from the population.

The key advantages of purposive sampling include the opportunity provided to the researcher to select all parties relevant to the study, the ability to target niche demographics to obtain specific data points and the information collected generally having a low margin of error.

While the overall methods detailed above provided an array of benefits, the nature of surveys meant that there were several limiting factors that affected the results that were gathered. These factors included aspects such as inaccuracies of databases used to obtain individual details (e.g., incorrect email addresses).

3.3 Summary of Research Undertaken

The research undertaken for this project included desk-based research and field research. Field research undertaken included focus groups, in-depth interviews, and online surveys.

3.3.1 Desk-Based Research

The desk-based research included a review of relevant literature regarding the impact of COVID-19 on CATHSSETA sub-sectors, including the impact of COVID-19 on occupational patterns and skills development as well as the recovery measures implemented to assist the sub-sectors mitigate the impact of the pandemic. This included a review of documents including, but not limited to:

- CATHSSETA, 2020. Discretionary Grants Policy
- CATHSSETA, 2021. SSP 2020/21 – 2024/25
- Department of Sports, Arts and Culture, 2021. A-Z of the Relief Plan from the Department of Sports, Arts and Culture (“DSAC”)
- Department of Tourism, 2020: Tourism Relief Fund for SMME
- Department of Tourism, 2021: Tourism Sector Recovery Plan: COVID-19 Response
- Department of Higher Education and Training, n.d. Social impact of the COVID-19 pandemic on youth in the Post School Education and Training (“PSET”) Sector in South Africa
- South African Government, 2020. The ERRP
- The National Skills Development Plan (“NSDP”), 2019.

A full list of references can be found in Section 8.

3.3.2 Fieldwork Undertaken

The following methods were used to collect primary data for this study:

- Online Surveys

- In-depth Interviews
- Focus Groups

The participants of the study from which primary data was collected were categorised into five stakeholder types:

- **Employers:** These included owners of businesses of varying sizes across all CATHSSETA sub-sectors. Examples of some of the Employers that participated in the surveys, interviews and focus groups included owners of hotels, restaurants, casinos, travel agencies, sports organisations, game reserves and theatres.
- **SDFs:** These included individuals who operate within organisations within the CATHSSETA sub-sectors, whose duties include but are not limited to; assisting in the development of Workplace Skills Plans (“WSP”); advising employers on the implementation of the WSP; and producing annual training reports. These individuals also serve as liaisons between businesses and CATHSSETA (JT&A, 2021).
- **Training Providers:** These included various CATHSSETA accredited training providers, universities and TVET colleges that provide occupational skills training; technical, vocational and occupational skills training; and higher education and training (CATHSSETA, 2021).
- **Industry Experts:** These included key stakeholders that were equipped with vast experience in their respective fields/sub-sectors. Examples of industry experts that were interviewed included a Deputy Director within the Cultural Development Unit of the DSAC with 23 years of experience in the Arts, Culture and Heritage sub-sector; a Chief Operations Officer of an organisation in the Tourism and Travel Services sub-sector, with a proven track record of over 20 years’ experience in tourism; and a Manager within a Gambling, Liquor and Tourism Authority with over 9 years’ experience.
- **Learners:** These included learners that were currently or previously enrolled in CATHSSETA-funded learning programmes at the time the research study was conducted.

The table below provides a breakdown of the field research that was undertaken during the course of the Project.

Table 3-2: Field Research Undertaken

Stakeholder Type	Number of Planned Interviews, Focus Groups and Surveys	Number of Completed Interviews, Focus Groups and Surveys
In-depth Interviews		
Employers	12	13
SDFs	6	7

Stakeholder Type	Number of Planned Interviews, Focus Groups and Surveys	Number of Completed Interviews, Focus Groups and Surveys
Training Providers	3	3
Industry Experts	3	3
Total Interviews	24	26
Focus Groups		
Employers	1 with 12 participants	1 with 6 participants
SDFs & Training Providers	1 with 12 participants	1 with 8 participants
Learners	1 with 12 participants	1 with 14 participants
Total Focus Groups	3 with 36 participants	3 with 27 participants
Online Surveys		
Employers	379	160
SDFS		148
Training Providers		36
Learners		289
Total Surveys	379	633
Overall Total	439	686

Survey links were distributed to the entire database of relevant stakeholders via email and bulk SMSes. Overall, a total of 686 interviews, focus groups and surveys were conducted.

Key to the study was to ensure representation across the various CATHSSETA sub-sectors. The table below provides a breakdown of the sub-sector representation across the interview participants.

Table 3-3: Interview Breakdown

Sub-Sector	Category			
	Employers	SDFs	Training Providers	Industry Experts
Sports, Recreation & Fitness	2	1	1	-
Conservation	2	1	-	-
Gaming & Lotteries	2	1	-	1
Hospitality	4	2	1	-
Tourism & Travel Services	2	2	1	1
Arts, Culture & Heritage	2	1	-	1
Total	14*	9*	3	3

**The totals above may not match the total interviews as some stakeholders interviewed represented 2 sub-sectors.*

3.3.2.1 Surveys

Quantitative data was obtained through online surveys. This method of survey distribution was chosen as it offers several advantages over telephonic surveys, namely lower costs, convenience for respondents, design flexibility, and automation and real time access to results (Gingery, 2011).

The surveys were designed based on the need to obtain specific information required by the study. The primary goal of the surveys was to gain insight into the extent to which the COVID-19 had negatively impacted CATHSSETA's sub-sectors. Questions in the survey were predominantly based on a 5-point Likert scale (with 5 denoting the most positive response and 1 indicating the most negative response). The Likert Scale is discussed further below. Open-ended questions were also included within the survey in order to provide further depth and understanding.

Overall, 633 survey responses were received from employers, SDFs, training providers and learners. This resulted in a confidence level of 95% and margin of error of 4%.

3.3.2.2 Interviews

The purpose of the in-depth interviews was to generate qualitative data that would lend depth to the quantitative data generated by the surveys. Interview questions were derived from preliminary research, the Project's objectives and through consultations with the CATHSSETA Project Team. The key stakeholder groups identified for interviews were employers, SDFs, training providers and industry experts.

Overall, 26 in-depth interviews were conducted with stakeholders.

3.3.2.3 Focus Groups

Virtual focus groups were undertaken to source data and information from relevant stakeholders. The purpose of these focus groups was to gain an understanding of the key areas of interest and enhance the qualitative view of the data. Focus groups took the form of a facilitated session focused on key discussion points that allowed for better participation.

Overall, 3 focus groups, with a total of 27 participants, were conducted via Microsoft ("MS") Teams. Focus groups were conducted with the purpose of further exploring certain areas of the study in order to adequately address the objectives of the study. In order to ensure representation, focus group invitations were distributed to stakeholders across all sub-sectors.

Qualitative data, in the form of quotes and observations from in-depth interviews and focus groups were included in the findings section of this report in order to substantiate the survey findings. To protect the anonymity of stakeholders that participated in the research study, names of individuals or the organisations that they represented were omitted from the comments included.

3.4 How to Read and Interpret Survey Results

As explained in Section 3.3, quantitative results were obtained through electronic surveys. The survey questions were predominantly based on a Likert scale. Likert-type or frequency scales use fixed choice response formats and are designed to measure attitudes or opinions (Bowling, 1997). An example of a Likert scale used in this report is the scale used to measure the extent of a state, ranging from "not at all" to "extensively" (see below), for instance, the extent to which respondents believed that COVID-19 negatively affected businesses in the sub-sector(s) in which their businesses operate.

Table 3-4: Likert Scale

Likert Scales of Extent				
Not at All	Minimally	Significantly	Substantially	Extensively

The scale provided in the table above, represents the different levels of extent that a respondent may select to indicate their opinion or attitude towards the subject matter, in this instance, the extent to which they were impacted by the COVID-19 pandemic. If denoted on an ordinal measurement scale, 'Not at All' would represent 1 and 'Minimally' would represent 2. 'Significantly' would represent 3, while 'Substantially' would represent 4. 'Extensively', would represent a numerical value of 5 (Derrington, 2022). The use of an ordinal scale allows for the ordering of response options without establishing the degree of variation between them (QuestionPro, 2022). Instead, the scale indicates that each response option denotes an extent greater than the previous option on the scale. That is to say, 'Substantially' denotes an extent greater than 'Significantly' whilst 'Extensively' denotes the greatest impact or strongest perception.

The majority of the graphs presented throughout this report measure the percentage of respondents who selected a specific option/s over the total number of respondents

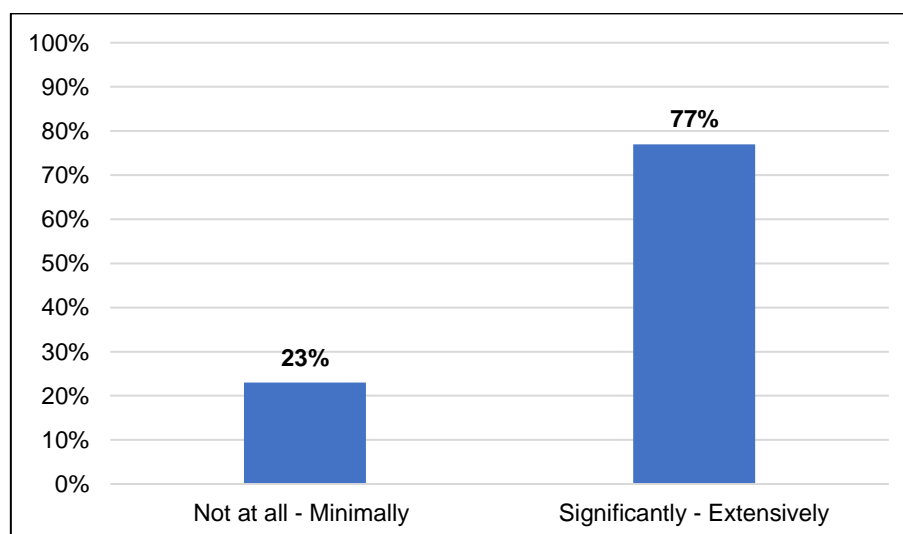
for that question. The figure below presents an example of how the survey results were analysed:

Figure 3-2: Illustrative Sample Survey Results

To what extent was your organisations negatively affected by the COVID-19 pandemic?	
Not at all	10%
Minimally	13%
Significantly	15%
Substantially	17%
Extensively	45%

To ease readability, graphs were presented as a sum of the negative responses compared to the sum of the positive responses (i.e. the sum of “Not at all” to “Minimally” compared to the sum of “Significantly”, “Substantially” and “Extensively”). These results were then presented graphically, as follows:

Figure 3-3: Illustrative Sample Graph

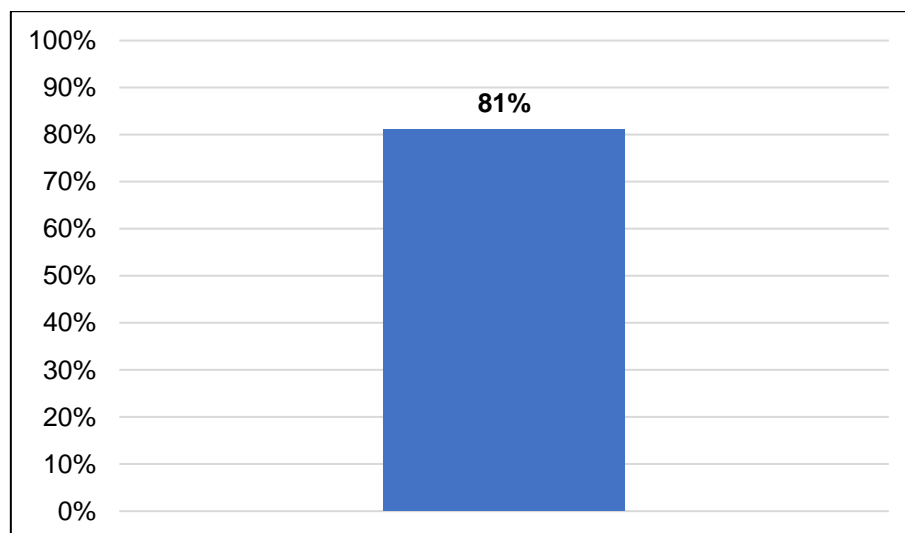


In instances where respondents were requested to indicate the extent to which they agree with a statement, a Likert scale ranging from “Strongly disagree” to “Strongly agree” was applied, for instance, the extent to which stakeholders believed that training providers were adequately capacitated to provide training on emerging skills.

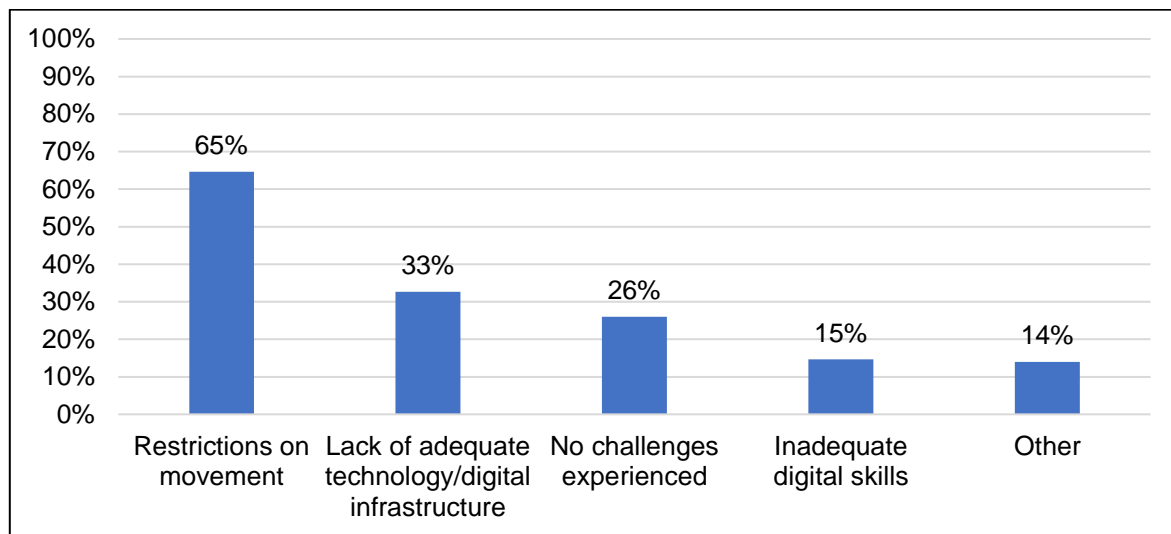
Figure 3-4: Illustrative Sample Survey Results 2

To what extent do you believe that training providers are adequately capacitated to provide training on new emerging skills as a result of COVID-19	
No new skills	4%
Strongly disagree	4%
Disagree	11%
Neither agree nor disagree	28%
Agree	38%
Strongly agree	16%

Results were presented as the sum of positive responses (i.e. the sum of 'Neither agree nor disagree', 'Agree', and 'Strongly Agree'). The figure below provides an illustrative example of how results were presented.

Figure 3-5: Illustrative Sample Graph 2

Where "Other" was provided as an option to respondents, respondents who selected this option were requested to provide further detail. The figure below provides an illustrative example of a question which included "Other" as a response option.

Figure 3-6: Illustrative Sample Graph 3

Specific to the example above, some of the comments noted by respondents who selected “other” as an option were as follows:

“Data was a problem during the pandemic. I was a student during that period, and I couldn’t afford data all the time for the online classes”

(Learners Focus Group, 2022)

3.4.1 Economic Forecasting Model

Using an economic forecasting model, the research study sought to explore the projected impact of Green Pass Certificates on businesses across the CATHSSETA sub-sectors. The following section details the process followed whilst collecting, capturing, and analysing data in order to develop the economic forecast.

3.4.1.1 Methodology

In order to develop the economic forecasting model, the following key assumptions were made:

- It was assumed that in this model, Green Pass Certificates would be granted to individuals who have been fully vaccinated
- *Ceteris Paribus* was assumed (i.e., all other variables remain constant)
- It was assumed that a change in the number of customers visiting businesses in the CATHSSETA sub-sectors is directly proportional to the revenue of these businesses, which, in turn, impacts the businesses’ contribution to the economy (i.e., GDP)

In order to gather data to inform the model, electronic surveys were developed and distributed to customers and employers within the CATHSSETA sub-sectors. The following sub-sections provide a summary of the approach that was followed to collect data from stakeholders.

3.4.1.2 Customers

In order to determine the impact of vaccination policies on customers in the CATHSSETA sub-sectors, a list of proxy establishments representing each of these sub-sectors was determined. Following this, a survey was drafted, requesting respondents to indicate which of these establishments they had visited over the past two years and which establishments they were more likely or less likely to visit should Green Pass Certificates be implemented. The table below presents the list of proxy establishments that were determined.

Table 3-5: Proxy Establishments

Sub-sector	Establishments
Sports, Recreation & Fitness	Stadiums; Gyms; Recreational Centres
Hospitality	Restaurants/Bars; Hotels/B&Bs/Lodges
Conservation	Wild life Parks; Game Farms; Botanical Gardens; Aquariums; Zoos
Tourism & Travel Services	Car Rental Companies; Tour Operators; Travel Agencies
Gaming & Lotteries	Casinos; Racecourses
Arts, Culture & Heritage	Theatres; Art Galleries; Museums; Festivals; Heritage Sites

A social media campaign was launched on 23 March 2022 in order to collect input from the public. Using a confidence level of 95% and a 5% margin of error, it was determined that a sample size of 385 respondents would be required to ensure representativeness. A total of **1476 survey** responses were obtained from customers.

3.4.1.3 Employers

Online surveys were drafted and distributed to employers provided in the contact databases, with the exception of respondents who had declined to participate in the research study.

This survey required respondents to indicate the CATHSSETA sub-sectors to which their businesses most closely aligned and whether they believed they would experience an increase or decrease in customers should Green Pass Certificates be implemented. They were further asked to indicate by what percentage they believed the number of customers would increase or decrease.

Surveys were distributed to a total population of 666 respondents. Using a confidence level of 90% and a 10% margin of error, it was determined that a sample size of 62 respondents would be representative of the population. A total of **77 survey responses** were received from businesses across CATHSSETA sub-sectors.

3.4.1.4 Data Analysis

The results of the survey were analysed in order to gain an understanding of whether the number of customers that visit businesses across CATHSSETA sub-sectors were anticipated to increase or decrease should Green Pass Vaccination Certificates be implemented. The model assumed that an increase or decrease in the number of customers would impact the revenue of businesses and consequently impact their GDP contribution. The findings of the economic forecasting model are presented in section 5.6 of the report.

3.5 Research and Methodological Limitations

A number of limitations were experienced during the data collection phase of the project. These included:

- Difficulty in sourcing secondary information for the literature review on the impact of COVID-19 on the CATHSSETA sub-sectors and how businesses across the sub-sectors have adapted during the pandemic in South Africa, owing to a lack of research studies conducted and published thus far. In order to overcome this challenge primary research was conducted in an attempt to fill these gaps.
- Difficulty in scheduling telephonic interviews and focus group with businesses, due to the absence of phone numbers in the contact database provided. In order to overcome this challenge, emails were sent out to a sample of businesses from all CATHSSETA sub-sectors to invite them to conduct interviews and participate in the focus group via MS Teams.
- Challenges in securing adequate survey responses for training providers and businesses. Additional contact details were requested from CATHSSETA in an attempt to increase responses from these stakeholders. In addition, up to 3 emails prompts were sent out to the stakeholders to remind them to complete the surveys. Three bulk SMS prompts were also sent out to stakeholders for whom mobile numbers were available.
- Challenges with incorrect or non-operational email addresses in the contact databases, which compromised the number of responses received for the surveys that were distributed.
- Challenges in securing adequate responses from businesses in the Gaming and Lotteries and Conservation sub-sector during the collection of data for the Economic Forecasting Model. In an attempt to overcome this, additional research was conducted to secure phone numbers for businesses in these sub-sectors. These stakeholders were contacted and requested to conduct the survey telephonically.
- Larger proportion of survey responses received from the Gauteng province. The study found that the highest proportion of respondents (34%) were from the Gauteng province. These results were substantiated by findings in CATHSSETA's 2020/21- 2024/25 SSP which indicated that 33% of CATHSSETA registered entities were from the Gauteng province. It was also

found that the majority of stakeholders listed in CATHSSETA's contact databases were based in Gauteng.

4 Literature Review

The section below provides key insights from the desktop research undertaken. The section begins by describing the impact of COVID-19 both globally and in the South African context, prior to detailing the impact of COVID-19 on individual CATHSSETA sub-sectors. This section also outlines the impact that COVID-19 has had on skills development, as well as providing an overview of some of the recovery plans that have been developed by the South African government in response to the COVID-19 pandemic. Furthermore, this section explores the impact of vaccination on access to markets and education and training initiatives, and outlines some of the international best practices with regard to businesses who have introduced measures in an attempt to mitigate the impact of the COVID-19 pandemic.

4.1 The COVID-19 Context

Since the emergence of the pandemic, several governments across the world were forced to implement lockdowns and impose restrictions on movement in an effort to limit the spread of the virus. This led to the COVID-19 pandemic not only being a health emergency but also a global economic and social crisis (Judit Simon, 2021). The impact of COVID-19 on South Africa followed a similar trend. The first case of COVID-19 in South Africa was reported on the 5th of March 2020. By the 12th of March 2020, the number of confirmed COVID-19 cases had increased rapidly to 921 cases. This rapid increase subsequently led to the declaration of a National State of Disaster by the President of the Republic of South Africa, in which restrictions were implemented as part of a National Lockdown to limit the spread of the virus. These included travel restrictions, lockdowns, banning of large gatherings, and the closing of schools and businesses that were regarded as non-essential.

In order to assess the impact of the pandemic on the economy, Redflank (2020) conducted the BeyondCOVID Impact Survey with over 4 000 businesses, including SMMEs, across the country. The survey measured several indicators such as the operational status of businesses during the COVID-19 pandemic, retrenchment rates, as well as skills gaps arising across several industries, including CATHSSETA sub-sectors. The survey found that sub-sectors such as Accommodation and Food, were severely impacted by the COVID-19 pandemic and faced permanent closure, while 50% of businesses in the Entertainment and Recreation sub-sector had to close temporarily. It was further found that 93% of businesses in the Tourism, Accommodation and Food sub-sectors, as well as 87% in the Entertainment and Recreation sub-sectors had experienced a decrease in revenue by the third quarter of 2020. In addition, 68% of businesses in the Tourism, Accommodation and Food sub-sector had retrenched employees. Similarly, 57% of businesses in the Arts, Entertainment, Recreation, and Sport had to retrench staff (BeyondCOVID, 2020).

Despite the initial impact of COVID-19, the South Africa economy began to recover during the first half of 2021 following the easing of the COVID-19 lockdown restrictions. The National Treasury (2021) reported that GDP was forecasted to grow by 5.1% in 2021 as domestic economic activity recovered more rapidly than anticipated, attributed to factors such as an increase in commodity prices and global demand for local goods. This included improved performance in exports of commodities such as agriculture (with the Agriculture sector expanding by 8.3% in the first half of 2021 when compared

to 2020), and mining production (which increased by 25.2% in the first half of 2021 when compared to the same period in 2020). This was a result of higher global prices and increase in demand (National Treasury, 2021).

4.2 The Impact of COVID-19 on CATHSSETA Sub-Sectors

As discussed above, COVID-19 had an immense impact on the South African economy. The enforced lockdowns implemented during the pandemic put additional strain on an already fragile South African economy. The restrictions on movement also had a disproportionate impact on businesses within the CATHSSETA sub-sectors, given the reliance of these businesses on the movement of individuals (e.g., the tourism sub-sector being reliant on the physical movement of tourists) (South African Government, 2020). The sections below provide further detail into some of the effects of the COVID-19 pandemic on each of the CATHSSETA sub-sectors.

4.2.1 Arts, Culture and Heritage

The Arts, Culture and Heritage sub-sector is broad and varied, and includes businesses in performing arts (live music, dance, theatre etc.), visual arts (photography, painting, sculpture, etc.), heritage (museums, galleries, heritage sites etc.), music production, television, radio, and cinema. On a global scale, the Cultural and Creative Industry (“CCI”) was negatively impacted by the COVID-19 pandemic. UNESCO (2021) found that countries where substantial revenue losses were reported included South Africa (-38%), the United Kingdom, (-30%), and the United States (-27%). When comparing the impact of COVID-19 on CCIs from different countries, across continents, it is clear that experiences were similar across national and international borders. The primary contributor to the losses was restrictions on movement that were imposed by various countries, including South Africa, in order to limit the spread of the virus. Although live performance sub-sectors were directly affected, all businesses within the sub-sector – such as museums, recording studios, and art galleries – were impacted to some extent (SACO, 2021).

The impact of COVID-19 on the Culture, Arts and Heritage sub-sector is particularly concerning, given the contributions of the sub-sector towards the South African economy prior to the COVID-19 pandemic. In a 2020 study conducted by the South African Cultural Observatory (“SACO”), it was revealed that the Culture, Arts and Heritage sub-sector contributed approximately 1.5% to South Africa’s GDP, amounting to a monetary contribution of R74.39 billion. In terms of the sub-sectors’ contribution to employment, the study indicated that cultural and creative economy employment accounted for an estimated 7% of all the jobs in South Africa, amounting to approximately 1.14 million jobs¹ (SACO, 2021).

While there is no comprehensive data available on the impact of COVID-19 on the Culture, Arts and Heritage sub-sector in terms of the sub-sectors’ current GDP contribution, there have been attempts to estimate the potential impact of the pandemic on its economic contribution. Based on these estimates, it was revealed that the sub-sectors’ contribution to the GDP shrunk by R42.2 billion in 2020 (approximately 50%). While there was a slight improvement in 2021, it is estimated that the sub-sector’s contribution will only revert to pre-COVID-19 levels in 2022. The

¹ Based on employment data gathered from CCI’s in 2017.

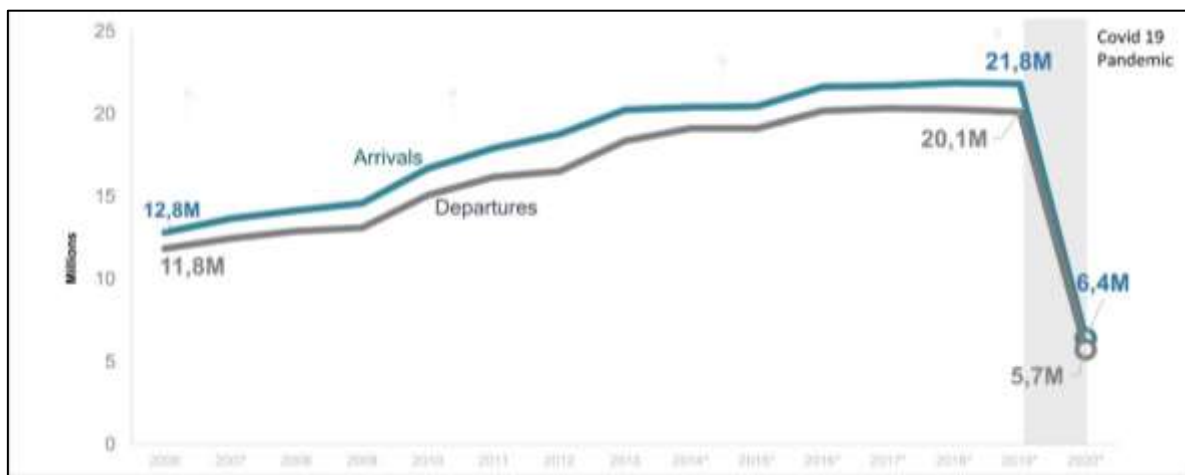
sub-sector contributed 50% less to the South African GDP when compared to 2019, primarily due to the COVID-19 related lockdowns. While the sub-sectors' contribution improved slightly in 2021, contributing 5.6% more to GDP than the previous year, the impact on the sub-sector is evident (SACO, 2021).

4.2.2 Tourism and Travel Services

Traditionally, the Tourism and Travel Services sub-sector has been difficult to define, given that the industry encompasses a variety of businesses, including hospitality (lodging and accommodation; food and beverages), transport, tourist attractions, and travel companies (Statista, 2021). Prior to the COVID-19 pandemic, the Tourism and Travel Services sub-sector accounted for 10% of the global GDP and employed over 320 million people worldwide, making it one of the most critical sub-sectors of the global economy (Economics Observatory, 2021). This is reflected in the pre-COVID-19 statistics with regard to the contribution of the sub-sector towards the broader South African economy. Statistics from 2017 show that the sub-sector directly accounted for 2.8% of the South African GDP and employed over 722 013 people (StatsSA, 2018).

Given the reliance of the Tourism and Travel Services industry on the movement of individuals, the sub-sector has been one of the most severely impacted globally by restrictions on movement (Economics Observatory, 2021). The outlook for the sub-sector in South Africa followed a similar trend. For example, airlines significantly reduced their operations and many tourist attractions were either closed or operating below capacity. The BeyondCOVID study found similar insights, indicating that during the second quarter of 2020, only 2% of businesses in the sub-sector were operating with increased capacity during the COVID-19 pandemic, while 4% were conducting business activities as usual. The majority of businesses (60%) were operating at reduced capacity, while 27% were closed temporarily. Not all businesses were able to adapt to the implications of the COVID-19 pandemic, as can be seen by the 7% of businesses who closed permanently.

Furthermore, the Department of Tourism (2021) indicated that approximately R52 billion was lost with regard to the overall quantity of goods and services produced between mid-March to the end of May 2020. The department further indicated that there was an approximate 75% reduction in revenue for the Tourism and Travel Services sub-sector in 2020, putting R149.7 billion in output, 430 000 jobs and R80.2 million in foreign receipts at risk (BeyondCOVID, 2020). One of the indicators of the economic state of the Tourism and Travel Services sub-sector is the number of foreign arrivals to South Africa. As such, a decrease in foreign arrivals, in most cases, results in a decrease in revenue for businesses across the sub-sector. The figure below shows the sharp decrease in foreign arrivals into South Africa in 2020.

Figure 4-1: Overall Number of Travellers (Arrivals and Departures)

Source: Statistics South Africa (2021)

According to Statistics South Africa (2021), foreign arrivals dropped from just over 21.8 million in 2019 to just less than 6.5 million in 2020. By February 2021, international tourist arrivals in South Africa had decreased by 88.7% when compared to the same month in 2020 (Department of Tourism, 2021). However, the easing of restrictions on movement led to some improvements in the sector. A comparison between the movements in November 2020 and November 2021 found that the number of arrivals and departures had increased for both domestic and foreign travellers. Stats SA (2021) reported that foreign arrivals increased by 143.4% in November 2021 compared to the same period in 2020, while departures increased by 139.1%. Among domestic travellers, the volume of arrivals increased by 84.3% in November 2021 compared to November 2020, while departures increased by 93.8%. However, following the discovery of a new COVID-19 variant, the Omicron, travel bans were imposed on South Africa and neighbouring countries, particularly by the UK. This led to a mass cancellation of flights to South Africa in December 2021, with bookings decreasing by 85% compared to the month before (Daniel, 2022). As a result, South Africa's tourism and hospitality sector lost R1 billion in cancelled bookings. While there appears to be inadequate statistics specifically detailing the economic impact of COVID-19 on the South African Tourism and Travel Services sub-sector in monetary terms, it is safe to assume that the decrease in foreign arrivals impacted the ability of businesses within the Tourism and Travel Services sub-sector to generate revenue.

4.2.3 Hospitality

The Hospitality sub-sector is closely linked to the Tourism and Travel Services sub-sector, consisting of businesses in lodging and accommodation, food and drink services, and event planning services. Prior to the COVID-19 pandemic, the Hospitality sub-sector was one of the fastest growing sub-sectors and was regarded as a significant contributor to the South African economy. This was primarily due to the contributions of the various segments that fall within the Hospitality sub-sector. One of the main industries within the broader Hospitality sub-sector is the restaurant and fast-food industry. Statistics show that restaurants represent the largest industry within the Hospitality sub-sector, providing 45 000 jobs, translating to around 7.6% of total employment within the Hospitality sub-sector (Olowoyo, et al., 2021).

Given the restrictions on movement imposed in response to the COVID-19 pandemic, the demand for services such as restaurants, travel services and hotels declined. In addition to reduced demand for said services, the sub-sector was not allowed to operate during the initial stages of the national lockdown, a limitation which impacted the revenue generating ability of businesses within the sub-sector. These limitations primarily occurred during alert level 5 of the national lockdown, which was particularly harsh on non-essential businesses across all sectors of the economy. However, the gradual re-opening of the South African economy – i.e., the decision to move South Africa to alert level 4 and subsequently level 3, meant that certain activities were permitted within the Hospitality industry.

It is estimated that approximately 1.6 million jobs may be lost in South Africa in 2021 as a result of the enforced lockdowns, with the majority of these losses occurring within the Hospitality industry. The hotel industry was expected to lose over 500 000 jobs. In May 2020, Stats SA reported that all accommodation types recorded large negative year-on-year growth in income from accommodation (Business Tech, 2021). Income from accommodation decreased by 77% from March to May 2020 when compared with March to May 2019. Despite this decrease, a statistical release by Stats SA (2021) indicated that total income for the tourist accommodation industry increased by 83.6% in November 2021, when compared to the same period in 2020. This was as a result of an increase in the number of accommodation bookings from tourists following the easing of lockdown restrictions.

Furthermore, the Department of Tourism (2021) indicated that 30% of South African restaurants had already closed permanently. In terms of income generated by the food and beverages industry, statistics show that this amount decreased by 24.6% in February 2021 when compared to February 2020. The largest decrease was recorded for catering services (-50.3%); bar sales (-49.3%); and restaurants and coffee shops (-31.4%) (CATHSSETA, 2021). On the other hand, takeaway and fast-food outlets, recorded a positive growth of 9.3% in October 2020 and a 0.1% increase in February 2021 (Department of Tourism, 2021). The decrease in income generated by the food and beverage sub-sector is particularly concerning given that in January 2019 alone, the sale of food at restaurants, coffee shops and fast-food outlets contributed R4.7 billion to the economy of South Africa (Olowoyo, et al., 2021).

4.2.4 Gaming and Lotteries

The Gaming and Lotteries sub-sector consists of casino gambling outlets, limited pay out machines (“LPMs”), sports betting outlets, bingo lounges and lottery services (CATHSSETA, n.d.). According to a sector analysis study conducted by CATHSSETA (2021), despite trends indicating a general drop in the number of gambling outlets within the Gaming and Lotteries sub-sector between 2016 to 2020, there were positive signs in terms of operational performance. Gross gaming revenues (“GGR”) also improved across the sub-sector as a whole during this period. While casinos lost around 1.4% in revenue between 2019 and 2020, bingo outlets (+14.6%), LPMs (+9.9%) and sports betting (+21.3%) recorded improvements in revenue during the same period (CATHSSETA, 2021). The above improvements with regard to the overall gaming revenue are an indication that the sub-sector was in a strong position to continue contributing to the South African economy prior to the pandemic. Additionally, during this period, the South African gambling industry was a multi-billion-rand sector

(National Gambling Board, 2020). In the 2019/20 financial year, bets wagered (i.e., turnover) reached R452 billion, while gross gambling revenue amounted to R32.7 billion.

However, the COVID-19 pandemic plunged gambling revenue growth into the negative in the 2020/21 financial year and presented the traditional gambling industry with losses of over R10 billion as gross gambling revenue decreased to R23.3 billion. In addition to a loss of revenue, a further R1 billion was lost by government due to the lack of collection of gambling taxes from the industry (National Gambling Board, 2020). This amounts to an approximate 33% decrease in taxes collected, (National Gambling Board, 2020).

While the hard lockdown forced all non-essential businesses to cease operations and operate remotely, which included the services offered by the South African Lottery operator, Ithuba Holdings RF (Proprietary) Limited, the operator was able to mitigate the impact of the COVID-19 pandemic by leveraging the electronic drawing system and animated draw shows that they had previously migrated to. This enabled the lottery and other draw services to adapt to a fully remote draw procedure relatively swiftly, thus allowing them to continue operating during lockdown (World Lottery Association, 2021). To date, the remote working model remains in operation for the company with all draws being conducted remotely and most staff members working from home. Despite this success, Ithuba noted that the financial year ending in March 2021 was the most challenging year that the company has had to face, given the impact of the COVID-19 pandemic on the company's business model and wider economy. For the 2020/21 financial year, Ithuba reported an overall decline in sales of 8.5% when compared to the 2019/20 financial year (World Lottery Association, 2021).

With regard to instant games, due to the shift to digital channels, as well as the preference of retailers to remove paper and minimise COVID-19 risks at the point of sale, Ithuba removed all instant games from retail stores. Furthermore, COVID-19 restrictions limited the number of players and shoppers in stores at any one time for certain casinos and smaller gaming houses, which further curtailed lottery retail activity. As a result of this, instant sales decreased 26.9% in the 2020/21 financial year. Additionally, with regard to sports-based games, research has indicated that sales of sports betting products declined by 12% for the 2020/21 financial year (World Lottery Association, 2021).

4.2.5 Conservation

South Africa is one of the most biodiverse countries in the world due to its species diversity, rate of endemism and diverse eco-systems (SAHunters, 2020). As such, the South African Conservation sub-sector is diverse and is characterised by several distinct sub-sectors. This includes sub-sectors such as non-timber forest products, wildlife filming and photography, wildlife trade, hunting, eco/wildlife tourism, fisheries, and wildlife hunting (SAHunters, 2020). It is important to note that the conservation sub-sector shares close links with the Tourism and Travel Services sub-sector, given the conservation sub-sectors' reliance on foreign visitors.

Across Africa, wildlife tourism represents approximately one third of tourism and travel revenue. In the South African context, van der Merwe (2021) notes that tourism related

to wildlife and biodiversity generated direct spending of R31 billion in the South African economy in 2015, with domestic tourism accounting for 52% (R16 billion) and foreign tourism accounting for 48% (R15 billion). In terms of GDP contribution, the sub-sector contributed R14.8 billion to the South African GDP in 2015, amounting to approximately 0.4% of the country's GDP (van der Merwe, et al., 2021). From an employment creation perspective, the sub-sector accounted for more than 88 000 direct jobs².

The links between the Conservation and Tourism and Travel Services sub-sectors have meant that the Conservation sub-sector has been disproportionately impacted due to the restrictions on movement. As such, the conservation sub-sector has experienced staggering financial losses. Specifically, the sub-sector relating to wildlife tourism was impacted to a greater extent than other sub-sectors within conservation given that hunting and ecotourism was brought to complete standstill (van der Merwe, et al., 2021). This is particularly concerning, given that wildlife is the leading source of tourist revenue in South Africa, through photographic safaris and hunting expeditions. According to van der Merwe (2021), wildlife is one of the primary tourist attractions for individuals visiting South Africa from abroad. In terms of financial loss, many public and private businesses operating within the wildlife tourism sub-sector of the broader conservation sector experienced substantial losses, particularly through the cancellation of wildlife tours and hunting expeditions. The table below details the financial losses experienced by private game farms due to cancellation of certain activities across South Africa for the period spanning March to May 2020.

Figure 4-2: Financial Losses Due to Cancellation of Safaris and Hunting Expeditions (March to May 2020)

Province	Percentage cancellations	Average financial loss (ZAR)	Number of game farms	Total losses (ZAR million)
Eastern Cape	83.31%	R1 643 452	175	R287.6
Gauteng	68.57%	R950 000	159	R151.1
Western Cape	72.19%	R517 273	88	R45.5
Northern Cape	78.88%	R1 887 407	90	R169.9
Free State	83.00%	R764 031	137	R104.7
KwaZulu-Natal	85.36%	R3 022 222	84	R253.9
Mpumalanga	76.50%	R1 589 286	71	R112.8
North-West	75.09%	R2 556 545	179	R457.6
Limpopo	73.85%	R3 926 847	771	R3 027.6
Average/Total	77.42%	R1 873 007	1754	R4 610.6

Source: van der Merwe et al (2021)

As can be seen in the table above, on average, more than 77% of bookings were cancelled across all nine provinces. Provinces that experienced the highest cancellation rates were KwaZulu-Natal (85.36%), the Eastern Cape (83.31%) and the Free State (83%). The overall average financial loss recorded was R1.873 million due to these cancellations, with farms in Limpopo and KwaZulu-Natal experiencing an average loss of greater than R3 million. The total loss of revenue between March and May 2020 was R 4.611 billion.

The substantial decrease in revenue experienced during this period also impacted the employment capabilities of the wildlife tourism sub-sector. The extent of the impact on employment is detailed in the table below.

² It is important to note that the 88 000 relates to direct employment by businesses within the conservation sector, and not indirect employment, given that wildlife tourism also benefits other industries, such as airlines, hotels and public infrastructure.

Figure 4-3: Impact of COVID-19 on Game Farm Employees (March to May 2020)

	Average number of employees	Percentage on reduced wages	Percentage on unpaid leave	Percentage made redundant	Total number of employees affected
Eastern Cape	20.43	34.45%	16.55%	13.76%	2 315
Gauteng	14.71	25.00%	14.29%	17.86%	1 337
Western Cape	9.06	5.00%	11.25%	3.00%	153
Northern Cape	13.09	27.29%	16.40%	23.15%	788
Free State	10.85	33.55%	22.98%	22.08%	1 168
KwaZulu-Natal	30.81	64.00%	44.07%	31.62%	3 615
Mpumalanga	13.70	41.60%	31.11%	24.44%	945
North-West	17.12	33.44%	19.18%	16.60%	2 121
Limpopo	12.99	28.63%	16.50%	14.08%	5 928
Average/Total	15.86	32.55%	21.37%	18.51%	18371

Source: van der Merwe et al (2021)

As can be seen in the table above, the average game farm employs 16 people, with game farms in KwaZulu-Natal employing an average of 31 people. For the sub-sector as a whole, 32% of employees across the country received reduced wages, 21.37% had to take unpaid leave and 18.51% of employees were laid off. In total, more than 18 000 employees within the wildlife tourism sub-sector were negatively affected by the lockdown restrictions.

4.2.6 Sports, Recreation and Fitness

Traditionally, sports and recreational activities were seen as a predominantly social activity, with people engaging in such activities for social reasons. However, there has been a gradual shift in thinking as sport has become more professionalised, with many sporting businesses across the world now being regarded as business entities as opposed to being classified as social institutions (Moyo, et al., 2020). As a result of this professionalisation and sporting organisations being regarded as businesses, the sport industry has become a significant part of the global economy. The recognition of sport as a significant contributor to the economy has influenced the perception of sport in many developing countries, such as South Africa. In South Africa the sport, recreation and fitness sub-sector contributed substantially to the South African GDP. The total revenue of the sub-sector was projected to reach R6.9 billion in 2021 (CATHSSETA, 2021).

While the sub-sector is usually unaffected by external factors, the sub-sector has been severely handicapped by the COVID-19 pandemic. The sub-sector is seen as being a critical contributor to economic and social development, however, the impact of COVID-19 has meant that millions of jobs are at risk globally. These risks apply not only to sports professionals, but also to individuals employed by retail and sporting services industries connected with various global sporting leagues and events, employees in the tourism and travel services industry, transportation industry, as well as broadcasting (CATHSSETA, 2021).

The fitness sub-sector was also severely handicapped by the COVID-19 pandemic. This is evident in the decrease in membership and loss of revenue for South Africa's largest health club chain, Virgin Active. According to Business Tech (2021), globally, the total group membership of Virgin Active decreased by 25%, while the total number of active members decreased by 30%. In the South African context, Virgin Active South Africa reported a total membership base of 557 000 by the end of December 2020. When compared to the membership base of 685 000 in September 2020, representing a decrease in membership of approximately 19% (Business Tech, 2021).

From a financial perspective, research has indicated that Virgin Active in South Africa experienced decreases in revenue of approximately 46% when compared to 2019 revenue, primarily due to the fact that no revenue was generated during closure periods, given that health club memberships were put on freeze and no membership fees were collected (Business Tech , 2021).

While there is limited research available on the impact of COVID-19 on the South African fitness sub-sector as a whole, it is evident that the sector was severely affected by the COVID-19 pandemic. It is safe to assume that while a major group such as Virgin Active may have had the ability to sustain their businesses, smaller operators, such as studio gyms and private gyms, did not have the same resources to help sustain their businesses, particularly during the initial stages of the COVID-19 lockdown.

4.3 Impact of COVID-19 on Skills Development

COVID-19 has had a significant impact on the skills development landscape in South Africa, affecting the organisational patterns of workplaces and training providers in a very short period. This has put pressure on the majority of businesses and their employees to adjust their work patterns (Matli, 2020). A study conducted by News24 (2021) found that most employees have now become accustomed to working from home as opposed to commuting to an office on a daily basis.

The sections below unpack the impact of COVID-19 on skills development within the CATHSSETA sub-sectors by exploring the change drivers as well as how the COVID-19 pandemic has affected organisational patterns, skills provision, the access to education and training opportunities during and post-COVID-19, as well as emerging trends in education and training as a result of the COVID-19 pandemic.

4.3.1 Impact of COVID-19 on Occupational Patterns and Skills Provision

This section provides an overview of the impact of COVID-19 on organisational patterns and skills provision, as well as skills shortages that have arisen as a result.

4.3.1.1 Impact of COVID-19 on Occupational Patterns

Occupational trends have been greatly affected by sectors having to either down-scale their operations or cease operating altogether during the pandemic. The situation in South Africa was further exacerbated by the technical recession the country faced in 2019 before the crisis began. As such, employment levels were already vulnerable. Furthermore, in the period since 2017, the South African labour force has increased at a higher rate than total employment, leading to an increase in the unemployment rate. The emergence of COVID-19, thus, only served to worsen the impact on the country's employment rate (ILO, 2020).

The unemployment rate in South Africa increased from 30.1% at the beginning of 2020/21 to 34.4% in the second quarter of 2021, representing a 3.3% increase in unemployment since COVID-19 first emerged in South Africa (BusinessTech, 2021). The CATHSSETA 2020/21 - 2024/25 SSP, found that amongst all the CATHSSETA sub-sectors, venue-based sub-sectors such as the 'Arts, Culture and Heritage', and 'Tourism and Travel Services' sub-sectors have been amongst the hardest-hit by the pandemic. Employment numbers in both sub-sectors have been decreasing for two

years in a row from 2019/20 to 2021/22, with the 'Arts, Culture and Heritage' sub-sector losing 71.9% of employees, and the Tourism and Travel sub-sector losing 44.3% of employees. Two other sub-sectors, the 'Gaming and Lotteries' sub-sector (-27.2%) and the 'Hospitality' sub-sector (-24.2%) also recorded similar trends. The 'Conservation' sub-sector had an overall decline in jobs of 0.7%, having increased by 5.0% in 2020/21 before beginning to decline in 2021/22. Only the 'Sports, Recreation and Fitness' sub-sector experienced an upsurge of employees in the last 2 years, with an overall increase of 7.8% despite the number declining by 3.4% in the 2021/22 year (CATHSSETA, 2021).

The increase in the unemployment rate had not been even across genders and population groups. During the second quarter of 2021, the unemployment rate for males increased by 4.1% (from 28.3% to 32.4%) while that of females increased by 4.4% (from 32.4% to 36.8%). The unemployment rate was highest amongst black women, at a rate of 41.0%, while it was lowest amongst white women (at 8.2%) (StatsSA, 2021).

Research identified several factors that contributed to the increase in unemployment during the COVID-19 pandemic. It was found that some companies were unable to undergo the digital transition to remote working as their business model was dependent on physical interactions with customers. As a result, restrictions on movement meant that these either had to down-size their workforce or cease operating. This, in turn, resulted in a higher unemployment rate within the country (BusinessTech, 2021). One of the factors that contributed to the increases in unemployment was retrenchment, mostly influenced by low or no economic growth (BeyondCOVID, 2020). The retrenchments may be attributed to many jobs, such as client information and customer service workers, administrative and executive secretaries, and business services and administration managers, becoming redundant within the South African economy, as a result of the COVID-19 pandemic (WEF, 2020). A study conducted by the World Economic Forum ("WEF") (2020) on the future of jobs globally found that 37.5% of companies indicated that certain jobs had become redundant as a result of companies looking to restructure their businesses. Retrenchments and planned retrenchments were explored as part of the field work and are explored further in Sections 5.3.1.

Conversely, studies found that the COVID-19 pandemic accelerated the adoption of digital technologies and jobs/skills that had emerged as a result of the 4IR (Kostern, 2020). Some of the roles that have become necessitated by the COVID-19 pandemic included roles such as process automation specialists, data analysts and scientists, management and organisational analysts, business development professionals, compliance officers and artificial intelligence ("AI") learning specialists. These are mostly influenced by the increasing adoption of cloud computing, big data and e-commerce among businesses, requiring a workforce with the necessary digital skills (WEF, 2020). Section 5.4 provides an overview of the impact of COVID-19 on jobs and skills within the CATHSSETA sub-sectors, including what skills gaps have been exacerbated as a result of the pandemic. The section also explores jobs that are becoming redundant as well as emerging skills.

4.3.1.2 Impact of COVID-19 on Skills Provision

The restrictions on movement have necessitated a shift to online learning to ensure the continuation of skills development within South Africa. As a result, digital transformation has been accelerated considerably, requiring institutions that would have otherwise taken years to migrate to digital technology to instead do so in a matter of weeks (Mail & Guardian, 2020). Allais (2021) noted that this digital transformation has led to a marginalised access to skills training. Some of the greatest challenges of the transition to online learning include that only a few vocational institutions had the facilities required for online learning during the COVID-19 pandemic in 2021, while only a few students had the prior educational background or necessary facilities, such as a quiet working space, to be able to study digitally. Some students did not have access to digital devices, could not afford the high data costs, or did not have the necessary digital skills and so were excluded from learning (Landa, et al., 2021). This was further explored as part of the primary data gathering, with the findings from fieldwork being presented below.

Additionally, the ILO (2021) indicated that several enterprises, where students would have otherwise conducted their placements, closed down during the pandemic, which meant apprenticeships and work-based learning were suspended. TVET institutions face a challenge in ensuring that practical skills, such as laboratory and workshop-based modules, continue to be provided during the pandemic as these are not easily deliverable through remote channels (ILO, 2021).

Skills provision was also impacted by a lack of funding during the pandemic. As part of the tax relief offered to companies, a four-month holiday on skills development levy contributions from companies was announced and set to begin on 1 May 2020 (SARS, 2021). As a result, R6.1 billion in skills levies that would have otherwise been collected and contributed to the skills system were placed on hold, resulting in fewer funds available for skills training (Allais, 2021).

4.3.2 Access to Education and Training Opportunities During and Post COVID-19

Access to education and training during the COVID-19 pandemic has been a challenge for numerous skills seeking students as a result of the lack of mobility and subsequent digital migration. In particular, a lack of access to key resources, including computers and data, required for remote working has presented the greatest challenge (Landa, et al., 2021). South Africa has one of the highest data costs worldwide, which as a result, creates challenges in implementing digital learning as some students cannot afford the high costs, particularly in the rural areas (Matlali, 2020). Students who could not afford the computers and data were, thus, excluded from training programmes, while, for those who could afford the devices, digital literacy proved to be another challenge and students were not able to efficiently operate their digital devices while working remotely (Landa, et al., 2021).

Between 18 June 2020 and 18 September 2020, the DHET conducted a study to determine the social impact of COVID-19 on youth in the PSET sector across the nine provinces in South Africa to provide Higher Health with evidence on the education-related, physical and psychological effect of the COVID-19 pandemic on students in order to inform government responses. The study focused on youths between the

ages of 18 and 35 years who were either in some form of educational training or were enrolled in a tertiary institution (DHET, n.d.). This study found that the key challenges faced by students in their pursuit to access education were the loss of study time and not having the financial resources to purchase study material, with 57.9% and 55.8% of students consulted indicating this, respectively. A further 40.1% indicated that lack of funds for food affected their learning while only 7.5% of the students indicated that they faced no challenges at all during the pandemic. (DHET, n.d.).

Participants in the survey, particularly TVET and universities of technology students, also indicated that they encountered difficulties communicating with their institutions. However, the report also highlighted that over 80% of students at universities and universities of technology received institutional support in the form of data bundles and data-free access to websites. As a result, these students were able to access virtual learning. Contrastingly, it was found that significantly fewer TVET students (38.1%) indicated that their institution provided them with the resources to conduct virtual learning. Furthermore, among private colleges, less than 20% of students were provided with data bundles and data free-access to websites. However, the study found that over 90% of students at private colleges were able to access virtual learning (DHET, n.d.).

4.3.3 Emerging Trends in Education and Training Due to COVID-19

COVID-19 has led to the emergence of new trends in education and training by institutions of higher learning as well as skills providers. These new trends include the adoption of ICT, as well as distance learning. This section explores how these trends are impacting education and training during the pandemic, as well as how these can benefit the sector.

4.3.3.1 Information and Communication

The prevalence of remote working during the pandemic resulted in an increased need for ICT training initiatives (Mail & Guardian, 2020). ICT became an increasingly emerging trend in education and training as learners were forced to undertake learning from their homes following the announcement that schools and institutions of higher education would be closed for contact classes from 30 June 2021 (Allais, 2021). As such, the role of ICT in facilitating learning is increasing as it enables the access and sharing of information through multi modal communication styles (Majumdar, n.d.).

However, the pandemic exposed a lack of access for South Africans to internet and the digital devices required to either work or study remotely, as well as the need for increased initiatives in advancing ICT training and usage (Ahmed, 2020). Increased training and usage would provide options that practical skills providers such as TVETs, whose curriculum includes internships and apprenticeships, could adopt to still be able to deliver on their mandates. Additionally, it would allow learners who were unable to physically participate in workplace placements to participate remotely (ILO, 2021). ICT usage could also influence organisational patterns where, as reported in the Mail & Guardian (2020), companies have started introducing online apprenticeships and recruitment initiatives.

4.3.3.2 Distance Learning

The transition to distance learning is an area that, prior to the pandemic, had not been considered by most institutions, and was especially not prevalent in TVET colleges. The major reason cited for this was that these institutions provide practical skills training normally conducted in laboratories and workshops, or through work-based learning (ILO, 2021). However, a study by the ILO, UNESCO and the World Bank (2021) on the impact of COVID-19 on skills development, involving respondents from 126 different countries around the world, found that since the start of the pandemic, skills providers were increasingly adopting distance learning, similar to ICT. Innovations such as virtual practical training using simulators and virtual or augmented reality software were implemented by some institutions in countries where the required resources were available, and these have been made possible by ICT. Distance learning has allowed skills providers and facilitators to continue to deliver skills development despite the impact of the pandemic (Kara, 2021). Mpungose (2020) indicated that the provision of free data, free physical resources such as laptops, and free online resources is the best approach to enhancing remote learning as it contributes to the mitigation of digital inequalities and enables effective communication between learners and skills providers.

However, not all skills providers were able to adopt a distance learning approach. The transition to remote learning remained a challenge for those who were yet to adopt innovative approaches, including TVETs due to the practical nature of their training (ILO, 2021).

4.4 Recovery Plans

At a national level, a disaster recovery plan is a formal document developed by a particular country to provide detailed information on how to respond to unplanned incidents, such as natural disasters. In the South African context, the government has developed the ERRP and the Economic Reconstruction and Recovery Skills Strategy in response to the impact of the COVID-19 pandemic and skills development. These plans are discussed in detail in the sections below.

4.4.1 Economic Reconstruction and Recovery Plan

As a result of the severe economic impact of COVID-19 in South Africa, inequality was expected to widen and poverty to deepen. The SA Government (2020) explains that the ERRP is aimed at stimulating equitable and inclusive growth. The ERRP has three phases, namely, 'engage and preserve', 'recover and reform', and 'reconstruct and transform' (SA Government, 2020).

- **Phase 1: Engage and Preserve-** focuses on macro-economic interventions in an attempt to ensure social stability and food security through targeted support for employment preservation, SMMEs, vulnerable households, firms and financial systems.
- **Phase 2: Recover and Reform-** focuses on restarting the economy while controlling health risks to avoid a total collapse in employment, investment, and production.

- **Phase 3: Reconstruct and Transform-** focuses on enhancing public employment programmes through interventions including SMME development, the rolling-out of infrastructure and the localisation of industries.

The SA Government (2020) believed that some key interventions, not limited to particular phases of the plan, but rather to the implementation of the plan as a whole, would need to be put in place for the ERRP to be implemented successfully. These key interventions include (SA Government, 2020):

- Infrastructure Development and Delivery
- Localisation of Industries
- Energy Security
- Green Economy Interventions
- Strengthening Food Security.

4.4.1.1 *Applicability of the Economic Reconstruction and Recovery Plan to CATHSSETA Sub-Sectors*

The South African government, through the ERRP, acknowledged that the Tourism, Cultural and Creative industries were among the hardest hit by COVID-19. The Tourism industry is described as being a 'growth focal point' due to the sub-sectors' ability to absorb varying skills levels through employment (SA Government, 2020). Furthermore, it was noted that the potential success of the sub-sector has positive implications for the general South African economy, given that tourism has close linkages to other sectors of the economy, such as hospitality and conservation (SA Government, 2020).

As a result of the importance of the Tourism, Cultural and Creative sub-sectors, efforts aimed at ensuring these sub-sectors' recovery and growth formed an integral part of the overall reconstruction and recovery effort. With regard to the Tourism sub-sector, the government introduced the tourism sector recovery plan. The recovery plan is a response by the sector and its partners to the effects and challenges brought about by the COVID-19 pandemic. The plan is aligned to the ERRP and acknowledges the need for targeted, coordinated action in order to mitigate the impacts of COVID-19. It also sets the sector on the most optimal path to recovery, transformation and long-term sustainability (Department of Tourism, 2021). The recovery plan is explored further in Section 4.4.1.4

In addition to developing interventions aimed at reviving the Tourism sector, the government has also developed interventions aimed at providing support to the Cultural and Creative industries. Government has indicated that interventions will be introduced to facilitate the development of online platforms in order to enable the distribution of cultural and creative products. Linked to the development of online platforms will be further interventions related to strengthening the online dissemination of cultural and creative products such as music, film and design through the introduction of appropriate incentives. The government further emphasises that in order to alleviate the demand and supply side constraints in the Cultural and Creative industries, focus will be placed on the following focus areas (South African Government, 2020):

- Stimulation of demand
- Audience development and consumption
- Supporting the development of local content; including digital content; and
- Developing cultural value adds to the tourism packages and enhancing the profile of coordinated value proposition

The ERRP also outlines particular interventions that would need to be put in place for the ERRP to be implemented successfully. These include interventions which focus on increasing employment opportunities within various sectors, including those under CATHSSETA's scope. For example, as part of the proposed 'Mass Public Employment Interventions', the ERRP notes that there is a need to increase investment in employment creation through public employment programmes that have the potential to create jobs in the shorter term. In order to facilitate the creation of jobs, the South African government has allocated approximately R100 million to job creation and job retention. The ERRP notes that this is part of an employment stimulus, "based primarily on direct public investment in employment" in order to counteract anticipated job losses (South African Government, 2020). According to the ERRP, the stimulus would enable the creation of a cumulative 2.5 million jobs by the end of 2021/22 and approximately 5 million jobs by 2023/24.

The mass public employment plan cuts across various sectors of the economy and spheres of government and aims to build on existing Expanded Public Works Programme initiatives and the implementation of the Presidential Youth Employment Intervention (South African Government, 2020). The following initiatives to boost mass employment creation will be implemented across departments³:

- The creation of 50 000 new job opportunities in environmental programmes
- The creation of 14 000 new jobs opportunities in community forestry
- Support for 34 070 livelihoods in the creative, cultural and sporting sector (including grant funding and protection of vulnerable posts in cultural institutions)
- Support to 5000 young entrepreneurs and micro-enterprises

4.4.1.2 Implementation Progress

The government is reliant on collaboration between various government departments and contributions of social partners from the private sector for the successful implementation of the ERRP. Overall, there is an agreement between all social partners on the steps that need to be taken in order to revive the South African economy and set it on a new, accelerated and inclusive growth path. In order to set the economy on this new growth path, the government identified three priority focus areas. These are (South African Government , 2020):

- Aggressive infrastructure investment
- Employment orientated strategic localisation, reindustrialisation and export promotion and

³ Interventions relating to the Conservation and Sports, Recreation and Fitness sub-sectors only were listed, given the objectives of this report.

- Enabling conditions and a supportive policy environment.

In order to achieve the objectives of the ERRP, various measures have been implemented, with each measure relating to a specific strategic intervention. For example, in order to achieve the objectives of the intervention related to 'protecting the supply base' through market entry facilitation programmes, the government has requested that businesses who demonstrate the potential to positively impact their local economy (through the implementation of innovative projects) apply for various forms of support from the government. Successful businesses/projects will then be exposed to various opportunities for funding and/or investment promotion platforms. Other examples are the development of the 'Infrastructure Maintenance Programme' in order to ensure that state owned attractions are properly maintained, or the development of the domestic tourism campaign in order to 'reignite the domestic tourism market'.

The table below maps the progress made for each of the ERRP's strategic interventions.

Table 4-1: ERRP Implementation Progress

Intervention	Funding	Impact	Resp.	0-6 months	6 – 12 months (+)	Progress
Protect the supply base through, market entry facilitation programmes to stimulate investment	Current budget of responsible department	Increase diversification of South Africa's product offering	Dept. of Tourism, Private Sector	X		<ul style="list-style-type: none"> • The department received 34 projects from various provinces. • One project in the Eastern Cape met the criteria for distressed high-impact projects, while two other projects require additional information on their impact in the municipal economy before they are considered for inclusion • The database of high impact distressed tourism establishments/ properties/ projects has six projects that are already taken to investment promotion platforms • The department expects these establishments to sign letters of intent in order to be included in the investment mobilisation efforts
Rollout a maintenance programme for state owned attractions	Current budget of responsible department	Protection of the tourism supply base	Dept. of Tourism, Owning entities	X		<ul style="list-style-type: none"> • Approximately 580 participants continued with maintenance work on state owned attractions in February 2021. This programme is currently being implemented in 19 South African National Parks • The draft concept document for the expansion of the programme and identification of sites has been completed • The Department finalised and signed a contract with the DBSA to act as an Implementing Agent to support infrastructure maintenance programme of Provincial state-owned attractions

Intervention	Funding	Impact	Resp.	0-6 months	6 – 12 months (+)	Progress
						<ul style="list-style-type: none"> Infrastructure Maintenance Programme implemented in three national parks: Marakele, Addo and Karoo National Parks
Reignite the domestic tourism market	Current budget of responsible department	Increase in the number of domestic holiday trips	Dept. of Tourism, SA Tourism	X		<ul style="list-style-type: none"> Deputy Minister took the domestic tourism campaign to the Bojanala District, in the Northwest Province on 09-10 February 2021, in an attempt to promote domestic tourism The Minister took the domestic tourism campaign to Gqeberha (Eastern Cape), ZF Mgcawu district (Northern Cape), Cape Winelands district (Western Cape), Mopani District (Limpopo), and Johannesburg Soweto (Gauteng) Draft review of the Development and Promotion of Tourism in South Africa was developed Domestic Tourism Scheme was implemented
Implement norms and standards to create consumer confidence.	Current budget of responsible department	Consumer confidence for on biosafety	Dept. of Tourism, Private Sector	X		<ul style="list-style-type: none"> In February 2021 the draft Norms and Standards were still open for public comments with closing date being the 1 April 2021
Facilitate re-entry into the regional and international markets	Current budget of responsible department	Increase in international tourist arrivals	Dept. of Tourism, SA Tourism, DIRCO, DHA		X	<ul style="list-style-type: none"> Information yet to be published
Continue to rollout e-visa programme	Current budget of responsible department	Increase the ease of travel to South Africa	DHA, Dept. of Tourism		X	<ul style="list-style-type: none"> Information yet to be published
Protection of aviation capacity through operations (Ensure Bilateral Agreements are reviewed)	Current budget of responsible department	Improved visitor experience Increase in the number of domestic holiday trips Increase in international tourist arrivals	DOT, DPE, Dept. of Tourism		X	<ul style="list-style-type: none"> Information yet to be published

Intervention	Funding	Impact	Resp.	0-6 months	6 – 12 months (+)	Progress
		Increase ease of connectivity to destination South Africa				
Facilitate transformation through implementation of tourism equity fund	Current budget of responsible department	Improved transformation levels in the sector in terms of management control, skills development, enterprise and supplier development and socio-economic development	Dept. of Tourism, DFIs		X	<ul style="list-style-type: none"> Information yet to be published.
Build a bidding pipeline for future conference and mega events	Current budget of responsible department	Increase in international tourist arrivals.	Dept. of Tourism, SA Tourism Provincial, and Cities Convention Bureaus		X	<ul style="list-style-type: none"> Information yet to be published

Source: Parliamentary Monitoring Group (2021)

4.4.1.3 Economic Reconstruction and Recovery Skills Strategy

Skills development was recognised as being one of the key enablers of the ERRP, with the government highlighting the importance of appropriate skills development interventions in order to respond to the COVID-19 pandemic. As such, the ERRP skills strategy was developed after the ERRP, with the primary purpose being to ensure that there are adequate skills available to support the implementation of the ERRP in a manner that not only creates opportunities for new entrants to the labour market but supports the sustainability of existing jobs (Mvalo, 2021). Additionally, the skills strategy is focused on "ensuring that the PSET system, in conjunction with key government departments and other stakeholders, will respond to the new demands which are being created in the economy" (Mvalo, 2021).

The ERRP skills strategy details skills interventions that are categorised into two dimensions. The first dimension covers interventions that are focused on the provision of targeted education and training programmes while the second dimension relates to interventions focused on enabling and supporting education to work transitions.

On the 1st of September 2021, the DSI and DHET held a meeting with the National Assembly Committee on Higher Education, Science and Training where it was stated that due to financial constraints and reduced funding allocations, the outcomes outlined in the ERRP skills strategy would only be realised in the medium or long term. PMG (2021) elaborates that “SETAs had expected to receive R19.4 billion for the financial year ending March 2021, but due to the skills development levy holiday as part of the government's tax relief measures, revenue had declined to only R12.4 billion.”

4.4.1.4 Sector Specific Recovery Plans

While the ERRP provides a broad plan, which focuses on all sectors across the economy, it is important to understand what specific recovery plans each CATHSSETA sub-sector has, in order to understand the interventions being implemented in a specific sub-sector to revive its economy. It is important to note that, at the time of compiling this report, not all CATHSSETA sub-sectors had developed sector specific recovery plans. As such, the section below details the recovery plans for the Conservation, Sport, Recreation and Fitness, Arts, Culture and Heritage, and Tourism and Travel Services sub-sectors.

- **Conservation**

While there is no specific recovery plan developed for the Conservation sub-sector, the Department of Forestry, Fisheries and the Environment (“DFFE”) has outlined some of the ways in which they will attempt to revive the conservation sub-sector. DFFE noted that at a continental level, South Africa, as the president of the African Ministerial Conference on the Environment (“AMCEN”), convened a virtual meeting in May 2020 to discuss a proposed green stimulus programme (DFFE, 2020). The green stimulus programme is aimed at supporting the continents response to COVID-19 in a more green and sustainable manner. The programme is intended to bring about a common and unifying continental response by enhancing cooperation and partnerships between and among African governments, non-state actors, intergovernmental organisations and the private sector in support of a comprehensive green recovery for Africa (DFFE, 2020).

Furthermore, DFFE has proposed that South Africa embraces a ‘nature positive future’ which will have several advantages. Firstly, DFFE notes that embracing a ‘nature positive future’ will ensure that new jobs are created in new industries, which will offer potential for the creation of new enterprises using new technologies. Secondly, through the development of new industries, businesses in South Africa who are the catalysts for the development of new industries, will have access to dedicated international ‘green funds’. These funds will offer a source of investment for the new industries. Furthermore, with regard to alternative funding instruments, the DFFE notes that green bonds⁴ are traditionally cheaper than traditional bonds, which is

⁴ A green bond is a funding instrument designed specifically to support climate-related of environmental projects.

beneficial for businesses within the green economy. Finally, DFFE noted that “investment in green and sustainable solutions offers opportunities to promote South Africa’s long term economic competitiveness and climate resilience” (DFFE, 2020).

In addition to the above, DFFE noted that in order to facilitate economic recovery, attention must be focused on stabilising industries hit hardest by the pandemic. Within the context of DFFE, this relates to stabilising nature-based tourism. In order to stabilise these economies, DFFE revised their budget to allocate R39 million to the iSimangaliso Wetland Authority (iSimangaliso) and R961 million to the South African National Parks (“SANParks”) (DFFE, 2020). To secure the financial viability of the conservation sub-sector, DFFE has ensured that capital spending in all of South Africa’s conservation entities is postponed until a suitable alternative source of funding is identified. Furthermore, budgets initially allocated towards capital spending will be reallocated to prevent job losses and to ensure that all of South Africa’s conservation entities have adequate human resources to continue with the valuable work performed by these entities, including anti-poacher and ranger services, wildlife management and the extensive programmes of scientific research coordinated by the South African National Biodiversity Institute (“SANBI”) (DFFE, 2020).

For non-governmental organisations in the conservation space, DFFE has adopted a two-pronged approach in order to assist these organisations. The first phase of the approach is focused on the establishment of a ministerial task team to assist with resource mobilisation for conservation COVID-19 responses. This task team consists of experts from diverse backgrounds in order to assist with the identification of innovative approaches to sustainable funding for the conservation sub-sector. While the initial focus of the task team will be on responding to the effects of COVID-19, the task team will also consider longer term sustainable funding mechanisms and models for the sector (DFFE, 2020).

The second aspect of the approach focuses on DFFE’s work with the International Union for Conservation of Nature (“IUCN”) and the Endangered Wildlife Trust (“EWT”). Through this work, DFFE has established a number of working groups, with the aim of developing recommendations on how to structure the post-COVID-19 recovery of the biodiversity and conservation sub-sector (DFFE, 2020).

- **Sports, Recreation and Fitness / Arts, Culture and Heritage**

The Department of Sport, Arts and Culture (“DSAC”) has implemented a number of relief fund measures for the Sports, Recreation and Fitness and Arts, Culture and Heritage sub-sectors, amounting to just under R700 000 000, benefitting approximately 65 000 individuals (South African Government News Agency, 2021). These interventions were implemented in partnership with the DSBD, the Presidential Employment Stimulus Programme (“PESP”) as well as the solidarity fund. These measures were aimed at providing relief to individuals within the sport and recreation sub-sector, specifically, athletes as well as coaches and technical support who were confirmed participants in events that were cancelled due to the COVID-19. The measures were also aimed at providing relief to businesses and freelancers within the arts and culture sub-sector that had to cancel events that would have occurred had it not been for the COVID-19 national lockdown, such as plays and/or live performances (DSAC, 2021).

Furthermore, it was noted the department received R655 million from National Treasury as part of the PESP (South African Government News Agency , 2021). To date, R472 million has been disbursed to retain and/or create 42 624 jobs.

Additionally, the department has continued to partner with Business and Arts South Africa (“BASA”) in offering the Debut Fund Programme. This programme targets emerging artists’ working in all disciplines across all provinces who are between the ages of 18-35 years old. The debut programme aims to equip beneficiaries with enterprise development skills. The programme also provides artists with opportunities to pitch for funding from alternative sources to further support their ventures (DSAC, 2021). The department has also partnered with SACO to give 800 participating artists’ skills that will allow them to benefit from the opportunities presented by the Fourth Industrial Revolution, such as digital and/or online marketing skills. This project has recently commenced and has also been made possible by the PESP funding. The department noted that 716 artists from six different provinces have registered for the programme, with each artist getting a monthly stipend of R6 500 for the duration of the programme (South African Government News Agency , 2021).

Furthermore, in July 2021, the department issued an open call for businesses within the industry to apply for the Mzansi Golden Economy (“MGE”) funding. The MGE is a strategy adopted by the department in order to ensure that the cultural industries are repositioned in order to respond to the impact of COVID-19 in an effective manner. This is done through the provision of funding to projects that can potentially contribute to economic growth and job creation during COVID-19. Examples of some of these projects are highlighted below (South African Government News Agency, 2021).

- The ‘cultural events initiative’ provides funding for big cultural events in different cities and towns across South Africa. These events provide platforms for artists and performers to showcase their talent and earn a living. It also provides a secondary and supportive employment for support staff responsible for managing these events.
- The ‘sourcing enterprise initiative’ sources goods and services from suppliers for events, shows, conferences and exhibitions
- The ‘public art project initiative’ considers proposals from artists who can do public art performance, such as street theatre and dance, outdoor mural artists and sculptors. The department has been funding such projects, which offer employment opportunities to visual artists
- The ‘touring venture initiative’ provides funding for art exhibitions, plays and public art performances that need to be taken to different cities.

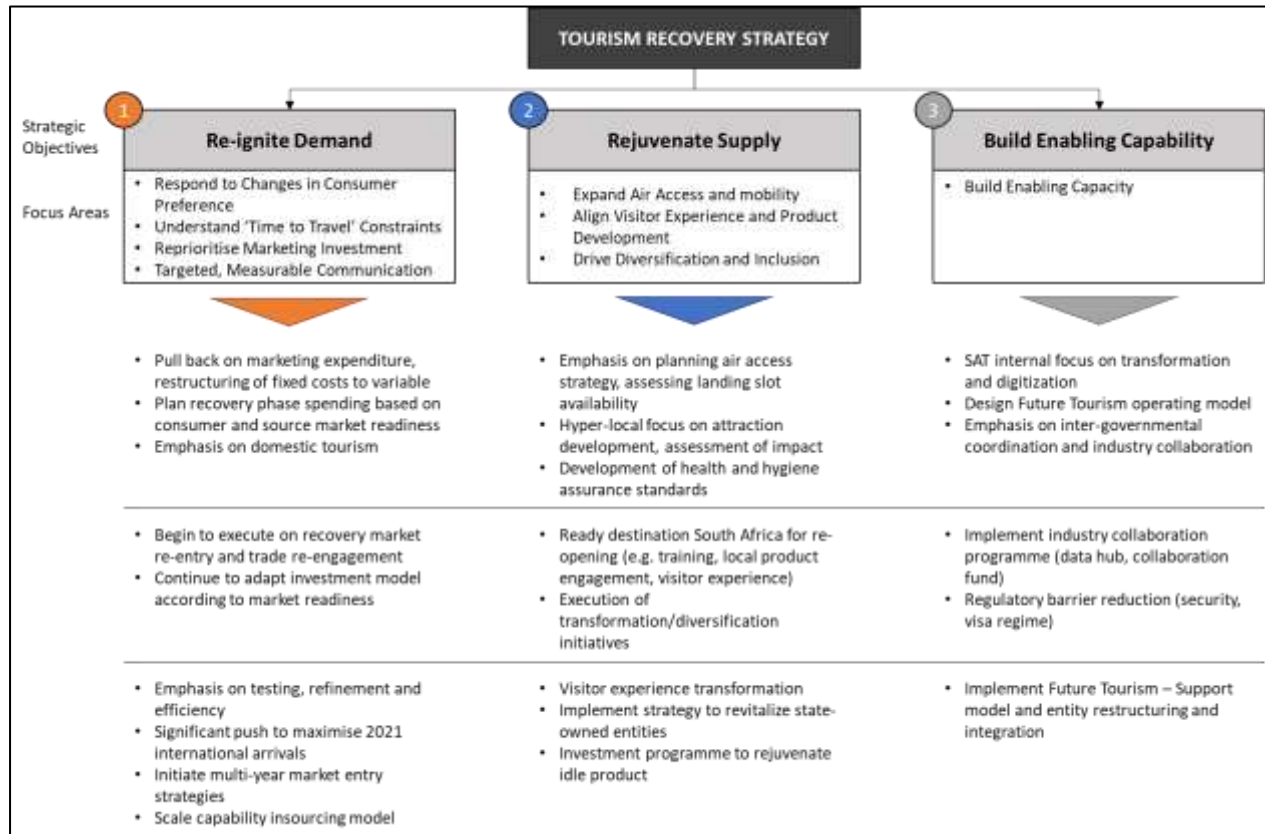
- **Tourism and Travel Services and Hospitality**

As mentioned in Section 4.4.1.1, the South African government introduced the Tourism Sector Recover Plan as a response to the effects and challenges brought about by COVID-19. Through this recovery plan, South Africa will adopt an integrated approach to tourism recovery while drawing lessons from global best practices working with multilateral institutions and platforms such as the African Union’s (“AU”) specialised technical committee on transport, transcontinental and interregional infrastructure, energy and tourism; the World Travel and Tourism Council (“WTTC”),

the United Nations World Tourism Organisation (“UNWTO”) and the G20 Tourism Agenda (Department of Tourism, 2021).

The recovery plan identified three recovery phases, as illustrated in the figure below (South African Government, 2020):

Figure 4-4: Government's Tourism Recovery Strategy



Source: South African Government (2020)

The Tourism Recovery Strategy also includes cooperation with neighbouring tourist destinations to develop a ‘regional value proposition’ for tourists, in order to increase the number of tourists to the Southern Africa region. Furthermore, the South African government has indicated that immediate measures will be implemented in order to protect the ‘supply side capacity’ of the tourism sub-sector (South African Government, 2020). These measures include:

- **Financial interventions:** This measure is focused on the establishment of the Tourism Relief Fund and the Tour Guide Fund.
- **Safety Protocols:** This measure is focused on the development and implementation of globally recognised biodiversity protocols.
- **Capital investment:** This measure is focused on launching an investment and market entry facilitation programme to stimulate capital investment, sector transformation and product diversification which is built into the tourism infrastructure pipeline.

In line with these immediate measures, the Department of Tourism will continue to work with other government departments in order to build on the progress made with

regard to increasing ease of access into South Africa for the purposes of invigorating the international tourist market (South African Government, 2020). Measures that will be implemented in order to increase ease of access into South Africa include the e-visa programme and visa waivers, where possible. The e-visa programme is aimed at increasing ease of access into South Africa by making the process of applying for a visa to the country more digitalised and convenient for potential foreign tourists. The implementation of the e-visa programme will significantly reduce the amount of time and administrative requirements required for visitors to enter South Africa (Business Tech, 2021).

Furthermore, given that the majority of businesses in the Tourism sub-sector are SMMEs, some of the short-term measures that have been introduced are the Tourism Relief Fund and the Tour Guide Fund. Both of these funds are primarily aimed at providing financial support to SMME's in the Tourism sector and wildlife tourism sub-sector (South African Government, 2020).

The following strategic interventions will be implemented in order to support the revival of the sector (Department of Tourism, 2021):

1. Implement norms and standards for safe operation across the tourism value chain in order to enable safe travel and to rebuild traveller confidence
2. Stimulate domestic demand through targeted interventions and campaigns
3. Strengthen the supply side through resource mobilisations and investment facilitation
4. Support for the protection of core tourism infrastructure and assets
5. Execute a global marketing programme to reignite international demand
6. Tourism regional integration
7. Review the tourism policy to provide enhance support for sector growth and development.

The plan also outlines key enablers which include forming targeted, strategic partnerships between government and key role players in industry, partnering with relevant departments to ensure improved travel facilitation through measures such as e-visas, increased tourist safety, quicker processing times with regard to tour operator licenses, distribution of the COVID-19 vaccine to frontline workers, attainment of population immunity, participating in global efforts to facilitate safe travel and stimulating domestic demand through government expenditure (Department of Tourism, 2021).

It is expected that the interventions and enablers described in the plan will facilitate the preservation of R189 billion, assisting the sector in recovering its 2019 output and employment levels, as well as positioning the sector for long-term sustainable growth. Furthermore, it is noted that the plan can potentially reduce the exacerbating impact of COVID-19 on unemployment by 125 000 jobs (Department of Tourism, 2021).

4.5 Impact of Vaccination on Access to Market, Education and Training

According to the WHO (2020), vaccination is a simple, safe, and effective way of protecting a person against harmful diseases, before they come into contact with the diseases. A vaccine uses a person's body's natural defences to build resistance to specific infections and makes their immune system stronger.

The rapid spread of COVID-19 across the world created the need for a global effort to develop and distribute an effective vaccine in an attempt to provide immunity against the virus and limit its spread. Several governments, multilateral organisations and private firms have since spent billions of dollars and utilised available resources to develop vaccines to combat COVID-19 (Felter, 2021). Bloomberg (2021) reported that as of the 7th of December 2021, more than 8.23 billion doses of vaccines had been administered across 184 countries in the world, proclaiming the global vaccine rollout as the biggest vaccination campaign in history.

4.5.1 Vaccination Rollout in South Africa

On the 3rd of January 2021, the South African Government announced the vaccine rollout strategy that would be implemented in order to curb the spread of COVID-19. The rollout strategy involved the selection of vaccines based on their safety and efficacy, ease of use, storage, distribution, supply sustainability and cost; and the adoption of a three-phase approach with the aim of vaccinating 67% of the population by the end of 2021 in order to achieve herd immunity (South African Government, 2021). The three-phase approach entailed:

- Phase 1: Vaccination of frontline healthcare workers as a first priority
- Phase 2: Vaccination of essential workers, persons in congregate settings, persons over 60 years and persons over 18 years with co-morbidities
- Phase 3: Vaccination of persons older than 18 years, targeting 22 500 000 of the population

A national rollout committee was established by the government to oversee the effective implementation of the vaccine rollout strategy in both the public and private sectors (South African Government, 2021). By the 1st of December 2021, 17.26 million South Africans had received at least one dose of the COVID-19 vaccine (Our World in Data, 2021).

The targeted immunisation of 67% of South Africans in order to achieve herd immunity has proved difficult to accomplish. Felter (2021) explains that the spread of new strains of the virus and public hesitation regarding vaccines are some of the reasons why certain countries have only managed to vaccinate small fractions of their populations. South Africa (25.0%) still lags behind the worldwide average (42.7%) with respect to the percentage of the population that is fully vaccinated (Our World in Data, 2021).

According to The New York Times (2021), South Africa's relatively low vaccination numbers may be attributed to the following factors:

- Long waiting period for the vaccines to arrive due to wealthier countries monopolising vaccines

- Neglected and underfunded public health infrastructure slowing the delivery of vaccines, especially to rural areas, where storage and staffing problems are common
- Distrust of governments and medical authorities, especially among rural and marginalised communities
- Misinformation circulating on social media
- Holding of regular briefings on television and in English, when radio remains the most powerful medium and most South Africans do not speak English as their mother tongue
- Online registration systems leaving out millions who do not have regular access to the internet
- Difficulty getting to vaccination sites.

A study conducted by Cooper, et al. (2021) concluded that communication campaigns (and other forms of community engagement that are responsive to vaccination concerns and associated information needs) could help build people's confidence in the safety and effectiveness of the vaccines. Nonetheless, the study further informed that appropriate forms of communication around the safety and efficacy of COVID-19 vaccines are not enough to build people's confidence in the vaccines. Strategies to address the hesitancy toward, and promote acceptance of, COVID-19 vaccines must involve more than information; and factor in individual experiences as well, i.e., the fact that people develop their own beliefs through their life experiences and that culture, personal background, education, class, religion, and political leanings all shape people's reactions to the facts supplied to them.

Building people's confidence in COVID-19 vaccines in South Africa also needs to form part of broader development and trust-building measures that focus on relationships, transparency, participation, and justice. For example, strong leadership and clarity around responses to the COVID-19 pandemic, including but not limited to vaccines, is important. The involvement and participation of senior government officials in the COVID-19 vaccination programme is also crucial. Here, non-governmental and civil society organisations as well as influential faith and cultural leaders, could play a crucial role in motivating communities toward accepting the COVID-19 vaccination (Cooper, et al., 2021).

At the time of the study, research on the impact of the vaccine rollout on CATHSSETA sub-sectors was limited. However, the research that was published indicated that high vaccination rates were a key factor in boosting travel confidence – which was a positive sign for the Tourism and Travel Services sub-sector. According to eHotelier (2021), 54% of Europeans intended to book a trip once they had been fully vaccinated against COVID-19. Furthermore, research has indicated that approximately 49% of people were of the view that receiving the COVID-19 vaccine is an important factor with regard to these individuals resuming recreational travel (eHotelier , 2021).

4.5.2 The Green Pass Certificate

According to The Knesset, cited by Kamin-Friedman & Raz (2021), the Green Pass was introduced in Israel with a dual purpose in mind: to allow (following the third

COVID-19 wave) and to maintain (in the wake of the fourth wave) the opening of the economy, the education system, and the cultural sphere with a minimum risk of elevating morbidity, as well as to encourage vaccination.

As of March 2021, Israeli law required the presentation of a Green Pass certificate as a precondition for entering certain businesses and public spheres. Entitlement to a Green Pass certificate is granted to Israelis who have been vaccinated with two doses of the COVID-19 vaccine, who have recovered from COVID-19, or who are participating in a clinical trial for vaccine development in Israel activity (Kamin-Friedman & Raz, 2021).

The Green Pass certificate allows its holder to confirm their immunisation status and take part in various activities such as cultural and sports events, conferences, gym classes and workouts, exhibitions, swimming in public swimming pools, hotel stays, eating out at restaurants, and visiting tourist attractions, which have all been closed in Israel intermittently since April 2020. The Green Pass is essential for retaining immune individuals' freedom of movement and for promoting the public interest in reopening the economic, educational, and cultural spheres of activity (Kamin-Friedman & Raz, 2021).

On the 6th of August 2021, Italy introduced the Green Pass certificate. This gathered different reactions from citizens, igniting protests against the implementation of the Green Pass in some groups, while concurrently leading to an increase in bookings for vaccination appointments by those who were in favour of the Green Pass (Wanted in Rome, 2021). The implementation of the Green Pass was regarded as a crucial measure to keep businesses operational in Italy amid the resurgence of COVID-19 cases. To enforce its implementation, employers around the country were required to ensure that customers were in possession of Green Pass certificates. Wanted in Rome (2021) added "in the event of a violation, both the owner and the customer could face fines of between €400 and €1,000. If the offence is repeated three times, on three separate days, the business could be shut for up to 10 days".

The use of Green Pass certificates has since been adopted by several European countries under different names, namely, Austria, Belgium (COVID Safe Ticket), Cypress (Coronapass or Safe Pass), Germany, Greece (Greek COVID Pass), and Hungary (Euronews , 2021). Some of these countries have introduced rules that differ slightly from other countries pertaining the certificates. For example, In Belgium, the possession of a COVID Safe Ticket exempts attendees of outdoor events from wearing masks or social distancing. Despite the differences in implementation and the naming in different countries, the Green Pass certificate serves a common purpose of facilitating movement of citizens and the reopening of the economy within these countries (Euronews , 2021).

According to an article published in the Guardian (2021), if the primary aim of implementing the Green Pass certificate was to increase the number of people getting vaccinated, then the Green Pass has proven to be an effective solution in some countries (The Guardian, 2021). It was further noted that the Green Pass certificate was particularly effective at boosting vaccination rates in vaccine hesitant countries, such as France. According to the Guardian (2021) 60% of French citizens were unsure as to whether they would get vaccinated against COVID-19 or not in December 2020.

However, since President Emmanuel Macron's announcement of the use of Green Pass certificates in the country in mid-July 2021, over 13 million people have got their first dose of the vaccine (The Guardian, 2021).

At the time of this study, Green Pass certificates had not yet been implemented in South Africa. However, this study sought to determine the potential impact of Green Pass Certificates on CATHSSETA sub-sectors in South Africa, if they were to be implemented. In order to determine the potential impact of Green Pass certificates on CATHSSETA sub-sectors an economic forecasting model was developed. The results of this model are presented in Section 5.6.

4.5.2.1 Impact of Vaccination on Access to Markets

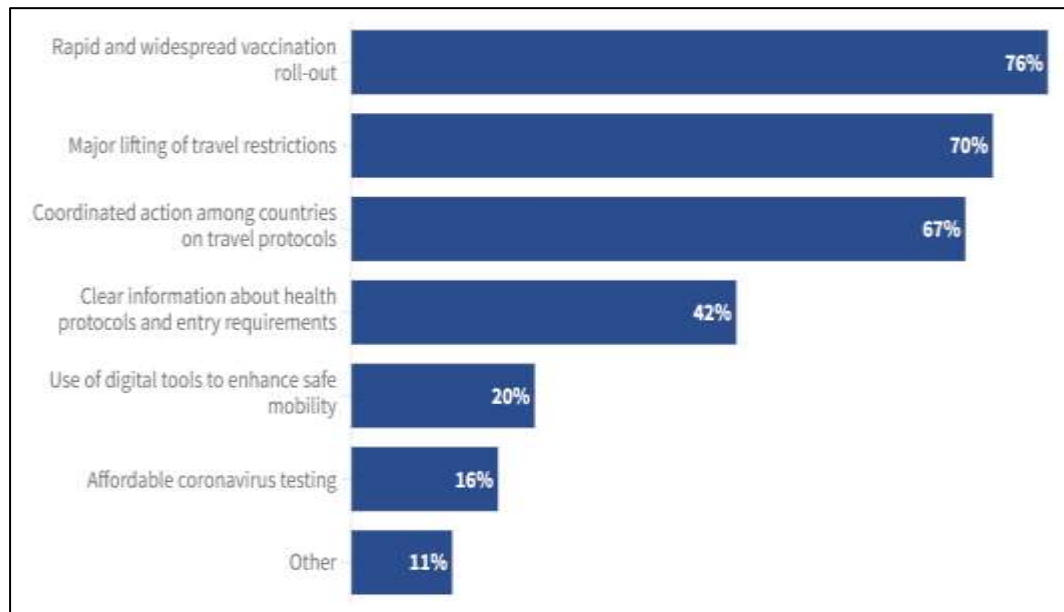
The COVID-19 pandemic has negatively impacted businesses' access to markets, due to the strict limitations that were imposed on the movement of individuals, in order to limit the spread of the virus. In addition to businesses being forced to cease operations, these restrictions also meant that there were no customers for businesses to sell their goods and/or services to. As highlighted previously, the rapid and effective implementation of a national vaccine rollout is, therefore, deemed as an integral part of the economic recovery process across various countries. Munro (2021), citing research by PwC and Business for SA, expounded that while successfully vaccinating 70% of adult South Africans is estimated to cost R13.5 billion, the monetary benefit that these vaccinations will have on the economy will dwarf the initial cost, with estimations indicating that vaccinations can boost economic growth by 2.5% over a five-year period. The eradication of infectious diseases, such as COVID-19, is anticipated to present economic benefits such as boosting business and customer confidence leading to the reopening of businesses; an increase in tax revenue as the economy recovers; and improved balance of resources as the focus shifts from fighting COVID-19 towards reviving the economy (Munro , 2021).

Munro (2021) found that there has been an increase in activity in the leisure and hospitality, and entertainment and tourism sub-sectors in countries that have made significant strides in vaccinating their populations. In particular, the effective distribution of vaccines in the United States has resulted in a notable increase in airline travel, with the number of daily passengers almost reaching pre-pandemic levels⁵. Similarly, several islands in the Caribbean, as well as countries in Europe, Africa, Asia and the Pacific reported an increase in tourist arrivals in 2021, with numbers rising towards pre-pandemic levels. UNWTO (2021) elaborates "the relaxation of travel restrictions for vaccinated travellers, coupled with progress made in the roll-out of COVID-19 vaccines, contributed to lifting consumer confidence and gradually restoring safe mobility in Europe and other parts of the world".

In September 2021, the UNWTO conducted a global survey among its UNWTO Panel of Tourism Experts on the impact of COVID-19 on tourism and the expected time of recovery (United Nations World Tourism Organization, 2021). Notably, rapid, and widespread vaccination roll-out was considered the main factor that could contribute to an effective recovery of international tourism, as can be seen in the figure below.

⁵ In the USA, the number of passengers using airports daily fell from 2.3 million (prior to the COVID-19 pandemic) to around 100 000 during the worst of the lockdown. The current number of passengers using airports daily, post-vaccine rollout, is approximately 2 million.

Figure 4-5: UNWTO Survey - Factors Influencing the Effective Recovery of International Tourism



Source: UNWTO (2021)

Despite the apparent correlation between vaccination rates and an increase in international tourism, many countries' travel restrictions are influenced by the UK "Red List," which is a list of destinations the UK government has defined as particularly high-risk for new and emerging strains of coronavirus (Financial Times , 2021). South Africa has been on the Red List twice to date, resulting in several countries issuing a travel ban on South Africa and surrounding countries, irrespective of vaccination. On 26 November 2021, South Africa was re-added to the Red List due to the emergence of the Omicron variant, despite instances of the variant emerging in other countries (Financial Times , 2021).

In the United Kingdom, the vaccination of a significant share of the population has resulted in the easing of restrictions to allow citizens to attend sporting events, concerts and conferences (Munro , 2021). Similarly, tourists and residents of Belgium are permitted to attend outdoor events of 1 500 people or more provided that they apply for a COVID Safe Ticket, prior to attending the event. To be eligible for the ticket, individuals are required to have been vaccinated for two weeks and have a negative COVID-19 test. Possession of the ticket exempts individuals attending these events from wearing masks or adhering to social distancing (Euronews , 2021). These measures have boosted confidence among business owners, event organisers and customers and has ultimately contributed to the recovery of the sector through ease of access to these markets and increased economic activity.

4.5.3 Projected Impact of Vaccination on Education/Training

Professor Martin Gustafsson, a senior researcher at the Department of Basic Education, stated that 50,000 fewer students could be enrolled across the entire education system in 2022 as a result of the COVID-19 pandemic and the associated lockdowns. The department estimated that learners in disadvantaged communities

lost a year's worth of learning in 2020 due to a lack of teaching contact time and a rotational learning system (Business Tech, 2021).

While several schools have incorporated online and digital learning platforms for students, the biggest challenge lies in making these platforms accessible for students⁶. Vaccination, therefore, plays a pivotal role in ensuring that there is increased access to education where remote learning is not yet accessible for students and/or feasible for institutions to implement (Global Partnership for Education, 2021). The WHO, cited by the Global Partnership for Education (2021), recommended that placing teachers on the priority list for receiving COVID-19 vaccines was an important step to reopening schools safely, as the safe reopening of schools would be critical to stem the loss of learning and ensure that an entire generation would not be left behind.

By the end of November 2021, five universities, namely; the University of the Free State, Rhodes University, University of Cape Town, University of the Western Cape, and University of the Witwatersrand, decided to implement mandatory vaccination for the registration for all students, as well as for staff working on campus, service providers and visitors. The University of Free State Rector and Vice-Chancellor Professor Francis Petersen stated that the policy implies that the university does not force anyone to be vaccinated, but that the institution has the right to require vaccination if a person wants to access its premises, in order to protect staff and students (Mahamba, 2021).

For those who are unable to take the vaccine due to medical or other legitimate and justifiable grounds, a recommendation for an exemption application process and an alternative health status process was approved. All exempted applications are planned to be evaluated by a team comprising of university officials and medical professionals. If the exemption is successful, then the student or staff member may be required to produce a negative COVID-19 test result on a weekly basis. This would be at the cost of the student, staff member, visitor or service provider concerned in specific circumstances (Mahamba, 2021).

4.6 International Best Practices

This section seeks to explore how international businesses, as well as businesses in CATHSSETA sub-sectors such as Tourism and Travel, Hospitality (including the food industry), and Sports and Recreation have adapted to the implications of COVID-19. Understanding how various businesses across the globe have responded to the COVID-19 pandemic is important as it provides businesses with guidance regarding interventions that may be adopted in order to assist them adapt to the pandemic.

4.6.1 Food Industry

Nedbank (2020) found that high-end restaurants, both local and abroad, that only offered table service prior to the pandemic, resorted to selling food as takeaways during the COVID-19 period in an attempt to generate income. This was implemented as a response to the COVID-19 lockdown regulations that restricted food services to drive-throughs, delivery, take-out and curb-side pick-ups (CDC, 2021). Fine-dining restaurants, such as the Johannesburg based DW Eleven-13 restaurant went from

⁶ Section 4.3.2 details access to education and training opportunities during and post COVID-19, and Section 4.3.3 details emerging trends in education and training due to COVID-19.

“serving meals that cost in the thousands, to delivering high-value comfort food personally” (Nedbank, 2020). This approach was adopted by numerous renowned restaurants in South Africa, such as, Test Kitchen and Wolfgat, in order to stay operational during the pandemic (Nedbank, 2020).

Several top chefs in the country initially rejected the idea of selling takeaways, stating that as fine-dining establishments, this was outside of their niche. However, loss of revenue as a result of a decrease in customers during the pandemic necessitated the reinvention of the business models for these businesses (Nedbank, 2020). Restaurants that were successful in shifting their operations to takeaway/delivery-only ascribed their success to the implementation of strategies such as the adjustment of operating schedules and employee roles, re-imagined dining rooms, new/limited menus and online ordering.

4.6.2 Hospitality Sub-Sector

As detailed in previous sections, the hospitality sub-sector faced a number of challenges as a result of COVID-19. Due to travel restrictions, the influx of international travellers in South Africa decreased tremendously. For several establishments in the sub-sector this meant that they had to close their operations temporarily or permanently and had to find ways to adapt to the situation.

On the 29th of April 2021, TimesLive (2021) reported there had been signs of recovery in domestic tourism in South Africa, with the country seeing a notable increase in accommodation bookings by local travellers during the months of February, March and April of 2021. Companies in the South African hotel and accommodation industry, such as ANEW, adopted new technology that involved the migration to a cloud-based property management system, which offered guests a seamless integration into the booking process including reservations, checking in and out and room service (ANEW Hotels and Resorts, 2021). The use of automated, cloud-based systems aimed to improve the guest experience while assisting the company adhere to health and safety protocols. By limiting physical interaction between staff and guests, the establishment was able to curb the spread of the virus. ANEW Hotels and Resorts (2021) elaborates that consumers have become more conscious about safety and hygiene protocols and, as a result, they expect businesses to have adequate measures in place. Therefore, it is important to encourage education on health and safety in businesses in the sector and harness available resources, such as technology, to create an environment that adheres to health and safety regulations (ANEW Hotels and Resorts, 2021). These aforementioned measures allowed ANEW Hotels and Resorts to sustain their business' operations during the pandemic.

4.6.3 Sports, Recreation and Fitness Sub-Sector

Internationally, USA sports organisations such as the Ultimate Fighting Championship (“UFC”), were among the first organisations to resume activities in the midst of the pandemic. The organisation undertook the necessary precautions in order to successfully organise and conduct live action events. This included COVID-19 testing for all fighters, production personnel, attending media members and other participants (Morgan, 2020). Additionally, the organisation conducted daily medical screenings and followed safety protocols such as social distancing and the mandatory wearing of masks. Morgan (2020) added that the UFC incurred substantial expenses as a result

of these measures and a loss in revenue due to inability to sell tickets, however, the adopted measures contributed to the revival of the sporting event. Despite the loss of revenue due to the inability to sell tickets during lockdown, the organisation was able to bolster turnover from sources such as pay-per-view buys and television services where customers could pay a subscription fee in order to gain access to UFC broadcasts. It was reported that the UFC 249 event of May 2020 attracted more than 700 000 viewers through paid subscriptions (UFC, 2020). The increased number of viewers during the lockdown allowed the UFC to generate revenue through these televised broadcasts and mitigate the effects of the COVID-19 lockdown.

In Canada, several sports organisations made the decision to temporarily close their programs and facilities following the announcement of the COVID-19 pandemic and subsequent lockdown in March 2020. As the restrictions were eased and these organisations were allowed to reopen, they adopted measures such as limiting sporting programs to outdoor facilities in order to encourage social distancing; increasing the sanitising of members and equipment to reduce the likelihood of transmission; and providing different platforms (such as social media platforms) for members to socialise and communicate with sport organisations (Sport Information Resource Centre, 2021). Furthermore, sport organisations in Ontario were able to receive federal and/or provincial wage subsidies and loans, due to the loss of income experienced during the pandemic. Some community sport organisations (“CSO”) were able to request direct or easily accessible rent relief arrangements to allow for the continued use of municipal facilities. SIRC (2021) explains that the CSOs in the Ontario community maintained close relationships with their corresponding municipalities and the ability of these organisations to adapt during the pandemic was facilitated by the support from municipal governments. SIRC (2021) asserts that “sport decision makers should have a clear understanding of the environment in which they operate—including knowledge of the key systems and stakeholders. Creating and maintaining strong relationships with key stakeholders can result in support to the organisation in difficult times”.

4.6.4 Tourism and Travel Services Sub-Sector

In Indonesia, the negative impact of the COVID-19 pandemic was experienced by a multitude of businesses in the tourism sector. These businesses either lost income, closed their businesses or sought alternative occupations (Kristiana, et al., 2021). The sector required support from key role players such as government and tourism departments in order bolster resilience within the sector and ensure the sustainability of businesses during crisis conditions such as the COVID-19 pandemic. In an effort to mitigate the impact of the pandemic, the Indonesian central government developed the Pre-Employment Card Program, which, Kristiana, et al. (2021) describes as “a training fee assistance program and incentives for workers, job seekers, micro and small business owners who have lost their jobs and/or experienced a decrease in purchasing power due to the COVID-19 pandemic”. The Pre-Employment Card Program combined temporary social assistance with skills development and was established as part of an extensive economic stimulus package which aimed to provide support to workers who were laid-off without or with reduced wage payments during the COVID-19 pandemic (SPEC , 2020). Additionally, the program aimed to develop new skills, enhance the skills of the active workforce, increase the productivity

and competitiveness in the labour market and support entrepreneurship development. According to SPEC (2020), participants of the program received the following:

- A training fee in the form of digital money amounting to Indonesian Rupiah ("IDR") 1 000 000
- Monthly assistance of IDR 600.000 per month for 4 months to provide subsistence; and
- An incentive fee of IDR 150,000 in the form of digital money for completing evaluation surveys

Since its inception, 11% of the first 1.2 million participants of the program have found new employment, mostly as SMME entrepreneurs. SPEC (2020) notes that despite the program improving skills across the sector, some participants found it difficult to find jobs as businesses that were largely impacted by the pandemic could not hire new employees due to financial constraints. SPEC (2020) expands on some of the challenges encountered by the programs, stating that with a limited budget of IDR 20 trillion and a maximum participants quota of 5.6 million people, the program was unable to meet the constant high demand for the program that was evidenced by the high number of registrants.

Additionally, the Kotawaringin Barat Regency Government provided a social assistance program, funded from the Regional Government Budget, allowing for the distribution of food supplies to tourism workers; issuing certificates to businesses that demonstrated adherence to safety and hygiene protocols; and advocated for the reopening of the tourism sector with the central government (Kristiana, et al., 2021). The Tourism Department of Kotawaringin Barat Regency has also encouraged the training of tourism workers, including tourism destination management training, tourist guide training, homestay management training, conducting online business development, and providing marketing support. These efforts allowed the tourism sector to reopen during the pandemic, however, to ensure the sustainability of the sector, more government participation is required in order to develop strategies that will effectively build resilience in the tourism sector.

5 Research Findings

This section provides the research findings of the study including stakeholder demographics and the impact of COVID-19 on businesses, employment, jobs, skills and training and educational initiatives. The section also provides a breakdown of the challenges faced as a result of the pandemic, how businesses within CATHSSETA sub-sectors have been able to adapt to these challenges and further support required to recover from the pandemic. Lastly, the section provides an overview of the anticipated impact of Green Pass Certificates on CATHSSETA sub-sectors.

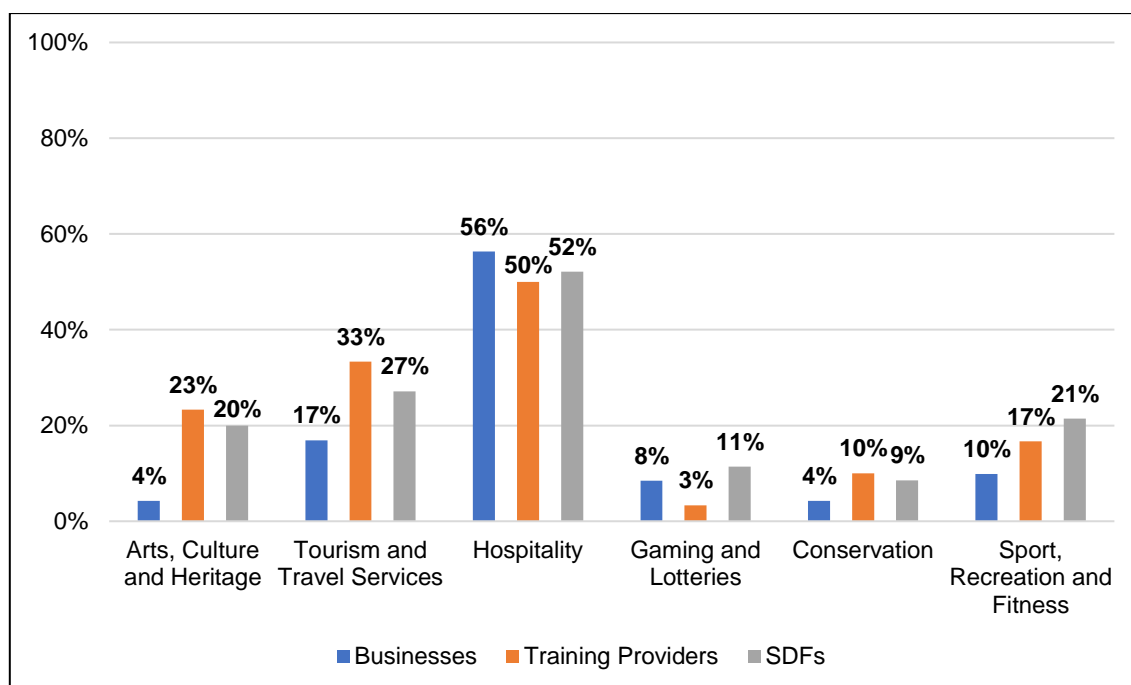
5.1 Stakeholder Demographics

The key demographics explored in this study included the CATHSSETA sub-sector to which survey respondents most closely aligned to, as well as the provinces in which the stakeholders are located. For employers, the study further explored the sizes of their businesses, as well as their operating status. For learners, enrolment in CATHSSETA-funded learning programmes and employment status were explored. Overall, the stakeholders surveyed in the study included employers, training providers, SDFs and learners. The results are presented in the following section.

5.1.1 CATHSSETA Sub-Sector

This section provides a breakdown of the CATHSSETA sub-sectors to which training providers, businesses and SDFs believed their businesses are most closely aligned to.

Figure 5-1: CATHSSETA Sub-sectors



Note: Percentages in the above graph may not add up to 100% due to rounding off. Additionally, respondents were allowed to select more than one option.

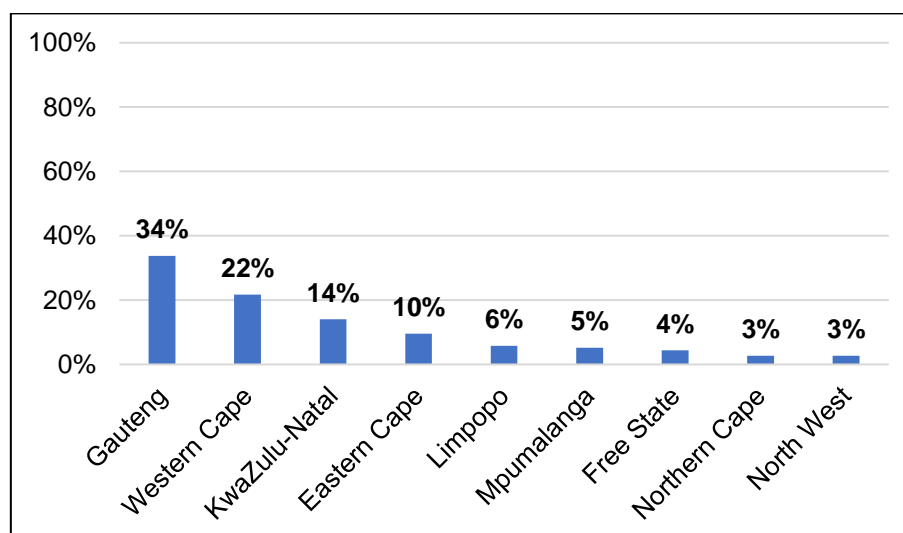
As seen in the figure above, the Hospitality sub-sector was represented by the majority of respondents across businesses (56%) SDFs (52%), and training providers (50%) . This was followed by the Tourism and Travel Services sub-sector, with stakeholder

representation comprising of 17% businesses, 33% training providers, and 27% SDFs. The sub-sector that had the lowest representation across all stakeholder types was the Gaming and Lotteries sub-sector, with 8% of businesses, 3% of training providers and 11% of SDFs.

5.1.2 Geographical Location

The figure below provides an overview of the provinces in which the surveyed businesses are located.

Figure 5-2: Geographical Representation



Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

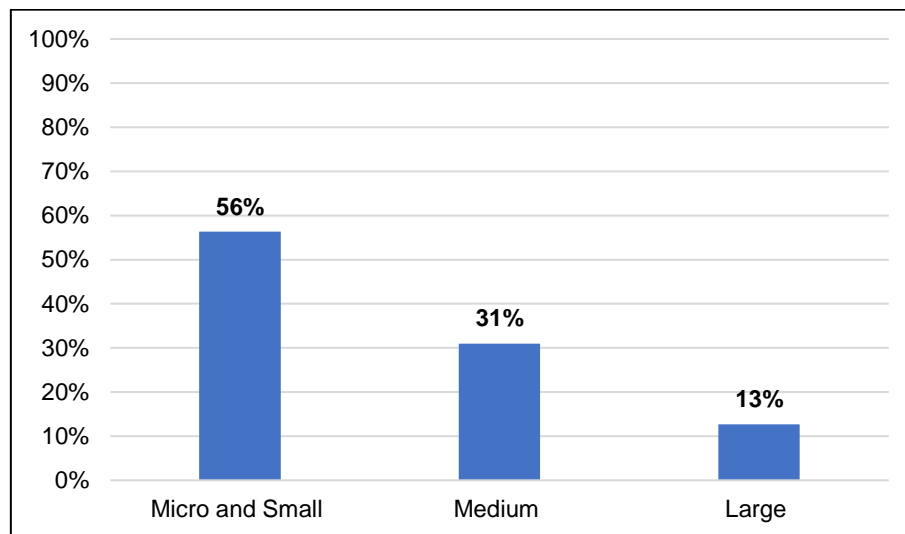
As can be seen above, the majority of respondents (56%) surveyed indicated that they were located in either Gauteng or the Western Cape. Furthermore, 14%, 10% and 6% of respondents indicated that they were located in KwaZulu-Natal, the Eastern Cape and Limpopo, respectively. The remaining respondents indicated that they were either located in Mpumalanga (5%), Free State (4%), Northern Cape (3%) or the North West (3%).

5.1.3 Business Demographics

The section below provides a breakdown of businesses that participated in the survey according to size of the businesses as well as their operating status.

5.1.3.1 Size of Organisation

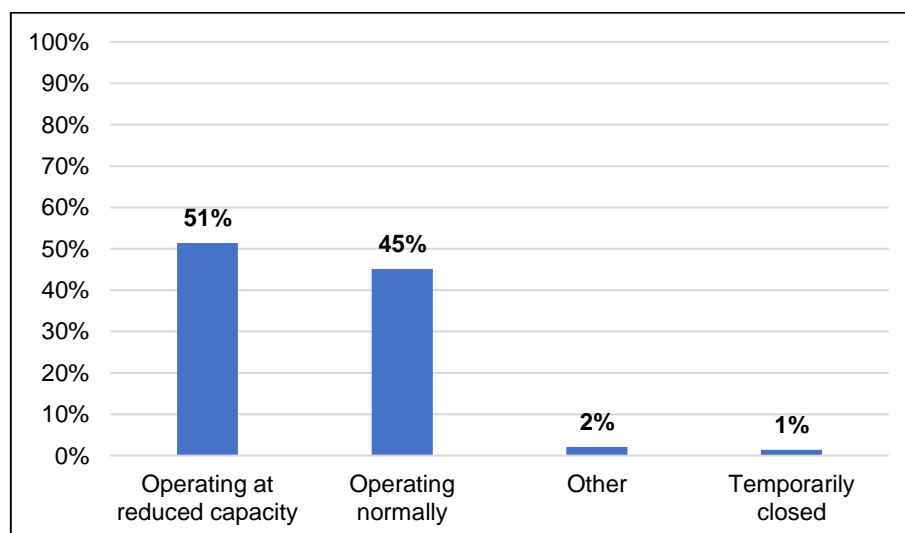
In order to understand the size of the businesses included in the survey, businesses were categorised according to the number of employees in the businesses. The business sizes represented in the below graph include micro to small enterprises (up to 50 employees); medium-sized enterprises (51 – 250 employees) and large enterprises (more than 250 employees).

Figure 5-3: Size of Organisation

As can be seen above, the highest number of responses (56%) were received from micro and small enterprises. 31% of the respondents noted that they employed between 51 to 250 employees and therefore, represented medium-sized enterprises. 13% of respondents represented large enterprises.

5.1.3.2 Operating Status

In order to gain a better understanding of the impact of COVID-19 on the operations of businesses, respondents were requested to indicate the operating status of their enterprises. These results are illustrated in the figure below.

Figure 5-4: Businesses Operating Status

Note: Percentages in the above graph may not add up to 100% due to rounding off

As can be seen above, the majority of respondents (51%) indicated that their business was operating at reduced capacity, while 45% indicated that they were operating normally. Only 1% of the respondents who participated in the survey indicated that their business was temporarily closed, while no respondents indicated that they had to permanently close their businesses.

2% of respondents indicated that their business's operating status was 'Other'. Among the respondents who selected the 'Other' option, a employers indicated that they were operating with the minimum number of employees required physically in the office, with other employees working remotely.

"[My business has] skeleton staff in the office [while] other [staff members] are working from home."

(Employers Survey, 2022)

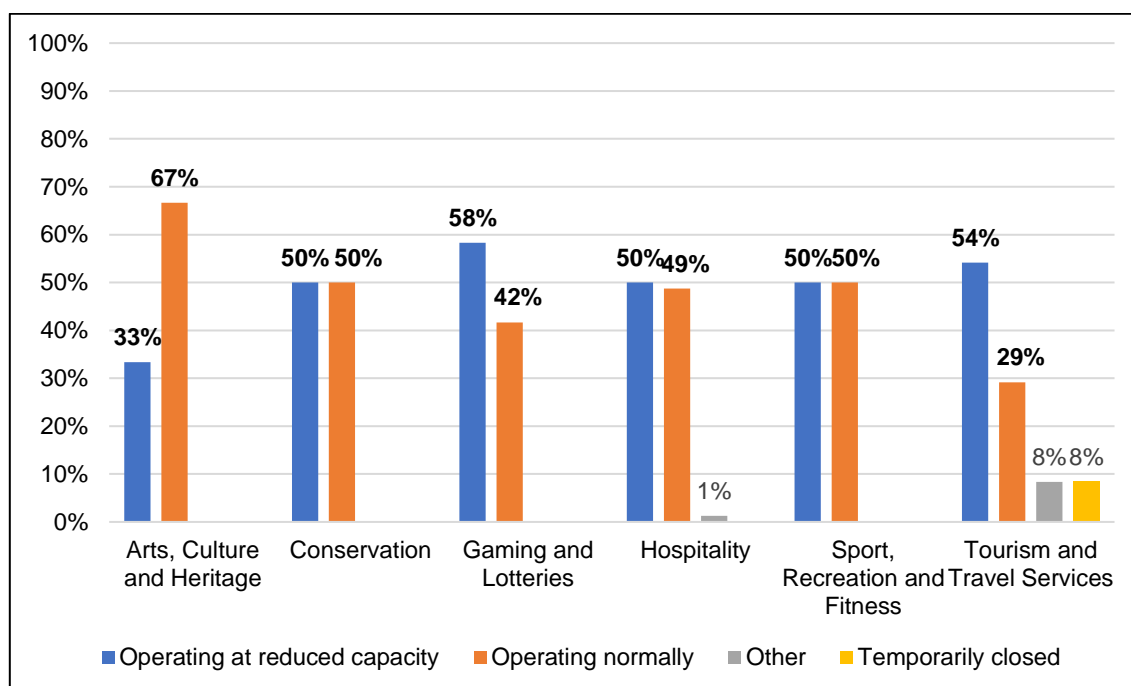
Other respondents indicated that they were operating normally with employees working on a rotational schedule.

"[We are] working 100% but on [a] rotation basis."

(Employers Survey, 2022)

The figure below illustrates a breakdown of the operating status of businesses per CATHSSETA sub-sector.

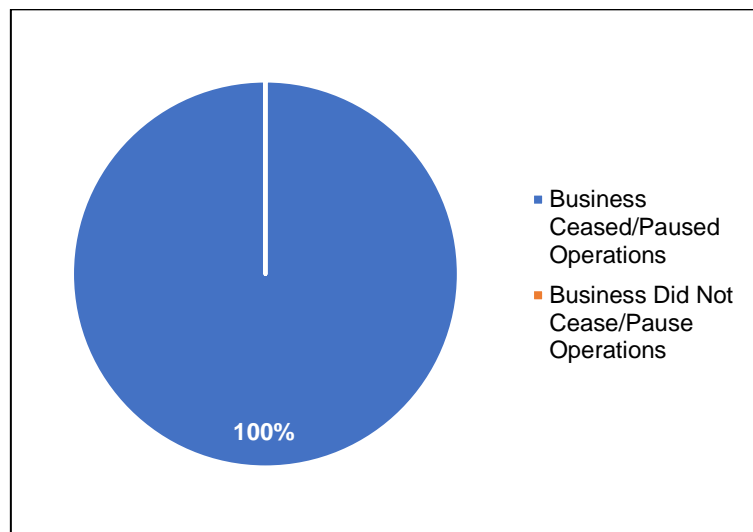
Figure 5-5: Sub-sector Analysis of Businesses' Operating Status



As can be seen in the figure above, the majority of respondents (67%) from the Arts, Culture and Heritage sub-sector indicated that their businesses were operating normally at the time of the study. 58% of respondents from the Gaming and Lotteries sub-sector indicated that their businesses were operating at reduced capacity. Furthermore, it was found that the Tourism and Travel Services sub-sector was the only sub-sector across which respondents (8%) indicated that their businesses had temporarily closed, at the time of the study.

Respondents who indicated that their business is temporarily closed were requested to indicate whether their operations had ceased/paused as a result of the challenges faced during the COVID-19 pandemic. The results are illustrated in the figure below.

Figure 5-6: Proportion of Businesses that Ceased/Paused Operations as a Result of the COVID-19 Pandemic



As can be seen in the figure above, all of these respondents indicated that their businesses had to cease/pause operations as a result of the challenges faced during the COVID-19 pandemic. Desk-based research highlighted that some companies either had to down-size their workforce or cease operating, due to their business models being dependent on physical interactions with customers, thus, limiting their ability to undergo the digital transition to remote working (BusinessTech, 2021).

Some stakeholders from the Hospitality sub-sector who participated in the study indicated that many hotels had to close down during the pandemic, noting that theirs only survived as they are part of a bigger group of hotels.

“I know a lot of hotel groups that had to close permanently but because we are quite a large group, the hotels that did manage to get an income were able to carry the other hotels through the lockdown.”

(SDFs Interview, 2022)

Other stakeholders within the same sub-sector indicated that they eventually had to sell off their hotel to another group as a result of their new business model, which targeted domestic tourists, not being successful.

“Our challenges included cancellations mainly with international guests. So, we opted for local tourists at a much cheaper rate. But it wasn’t ideal because it came with issues, some of them did not respect the property. At the end we ended up selling the hotel to another hotel group.”

(Employers Focus Group, 2022)

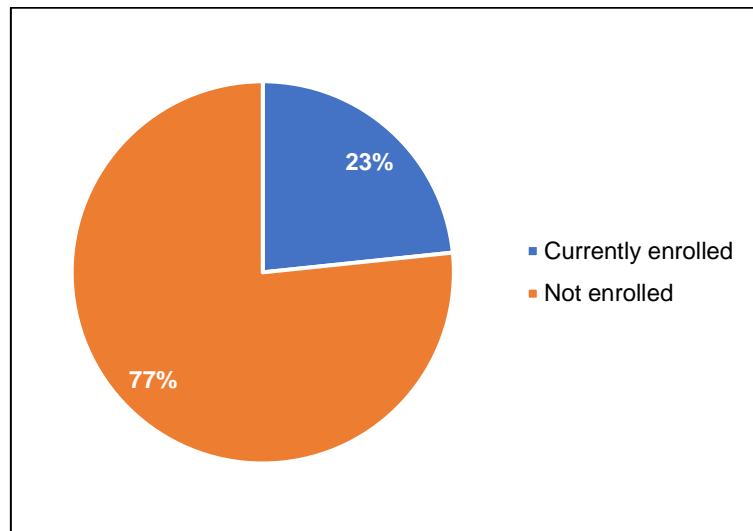
5.1.4 Learners

The following section provides an overview of learners enrolled in CATHSSETA-funded programmes, the type of learning programmes they are/were enrolled in, as well as their employment status.

5.1.4.1 Enrolment in CATHSSETA-Funded Learning Programmes

Learners were requested to indicate whether they are currently enrolled in a CATHSSETA-funded learning programme. The results are illustrated in the figure below.

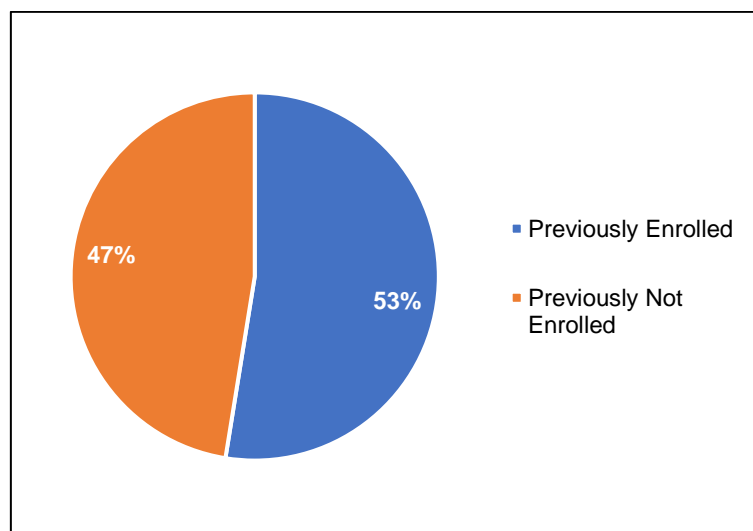
Figure 5-7: Proportion of Learners Currently Enrolled in CATHSSETA-funded Learning Programmes



As depicted in the figure above, only 23% of surveyed learners informed that they are currently enrolled in a CATHSSETA-funded learning programme while 77% indicated that they are currently not enrolled in any programme.

Learners who indicated that they are currently not enrolled in CATHSSETA-funded learning programmes were requested to indicate whether they were previously enrolled in CATHSSETA-funded learning programmes. The results are illustrated below.

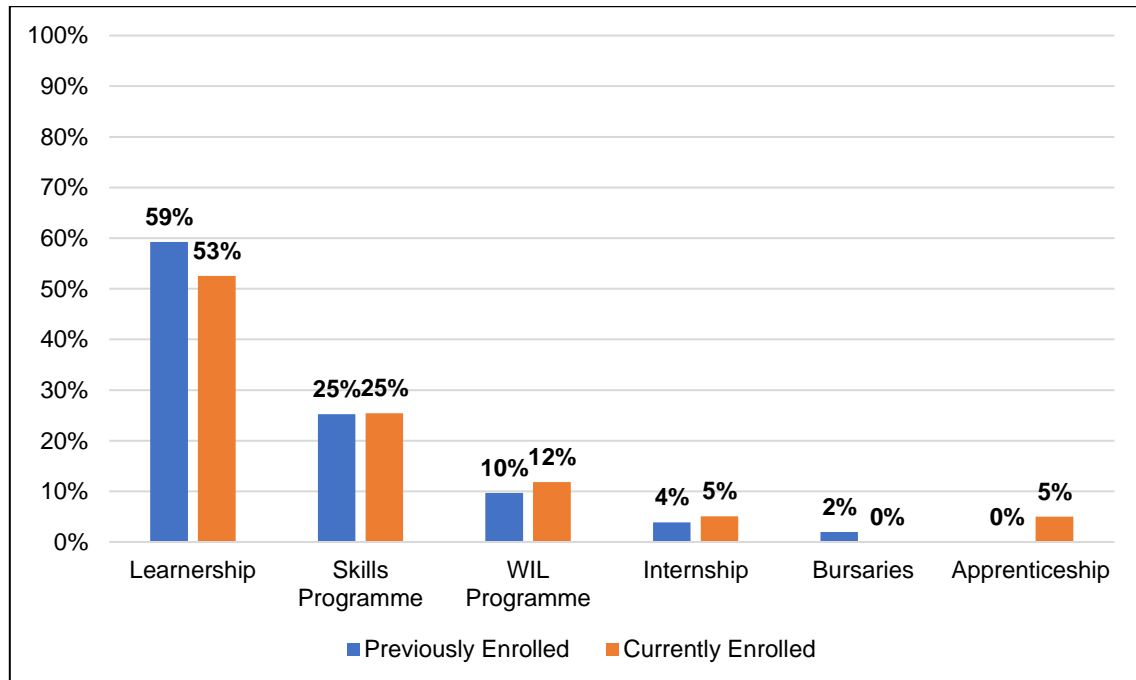
Figure 5-8: Proportion of Learners that were Previously Enrolled in CATHSSETA-funded Learning Programmes



As depicted in the figure above, 53% of the respondents indicated that they were previously enrolled in CATHSSETA-funded learning programmes.

Survey respondents were further requested to indicate the type of learning programme that they are currently, or were previously enrolled in. The results are illustrated in the figure below.

Figure 5-9: Type of CATHSSETA-funded Learning Programmes that Learners were/are Enrolled In

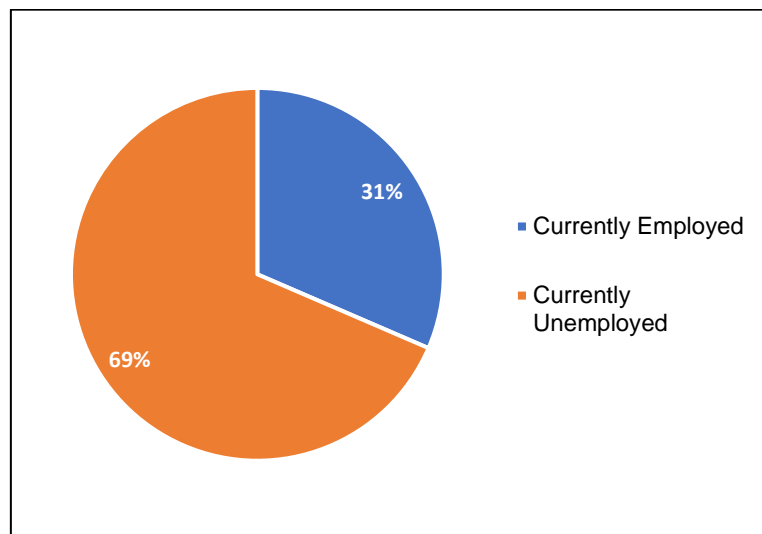


As depicted in the figure above, the percentage of learners previously enrolled in CATHSSETA-funded learnerships was 59%, whilst the percentage of learners currently enrolled in learnerships was 53%. 25% of respondents were previously enrolled in skills programmes, whilst the same percentage of respondents were currently enrolled in skills programmes. While no learners that responded are currently enrolled in bursary programmes, 2% indicated that they were previously enrolled.

5.1.4.2 Employment Status

Survey respondents were requested to indicate whether they were employed during the pandemic. The figure below illustrates these results.

Figure 5-10: Learners' Employment Status



As can be seen in the figure above, 69% of the learners that participated in the survey indicated that they were not employed during the pandemic.

"I was not employed during or before the pandemic... I am in the process of looking for a job, but it has been really difficult."

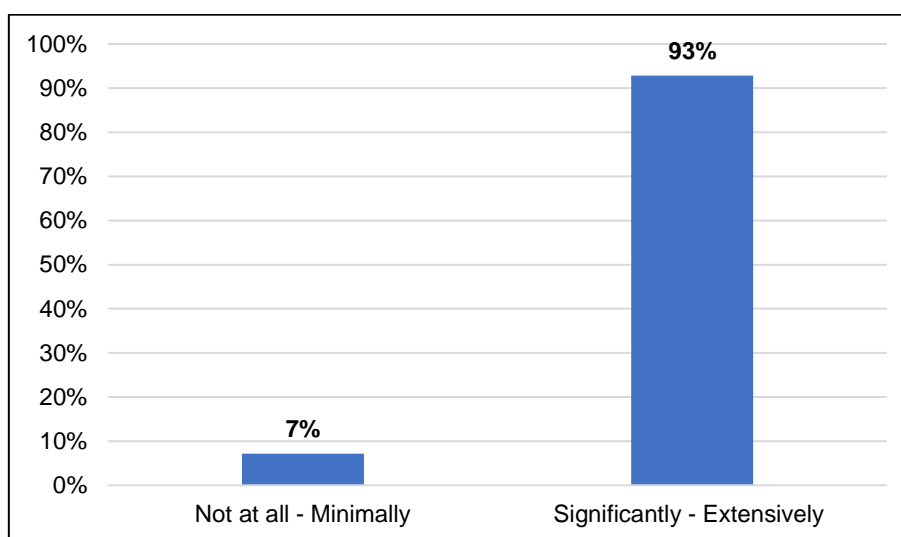
(Learners Focus Group, 2022)

Contrastingly, 31% of respondents indicated that they were employed during the pandemic.

5.2 Impact of COVID-19 on Businesses

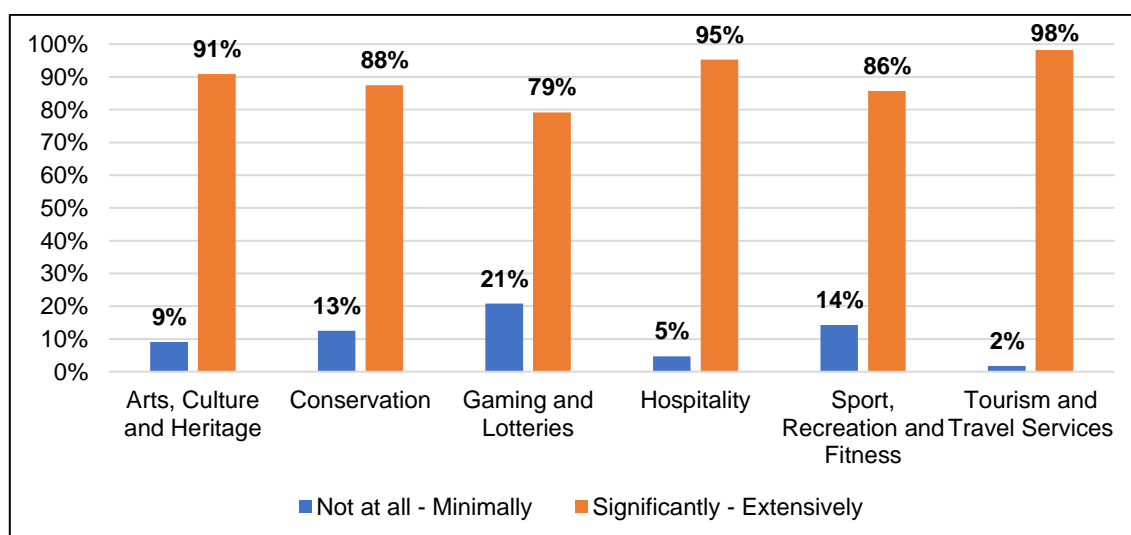
The following section explores the impact of the COVID-19 pandemic on businesses across the CATHSSETA sub-sectors. It provides an overview of the impact that the pandemic had on businesses' revenue and working conditions. Additionally, it explores the benefits and challenges that were experienced by businesses as a result of the pandemic; whether businesses have been able to adapt to the COVID-19 pandemic; and the support they require to recover from challenges faced.

The figure below illustrates the extent to which SDFs and employers believed that COVID-19 had negatively affected their organisation.

Figure 5-11: Extent to which COVID-19 Negatively Affected Businesses

As can be seen above, 93% of respondents indicated that the COVID-19 pandemic had affected their businesses either significantly, substantially or extensively. It was found that only 7% of businesses were either affected minimally or not at all by the COVID-19 pandemic.

In order to further unpack the impact of COVID-19 on businesses, survey results were analysed at the sub-sector level. The results are illustrated in the figure below.

Figure 5-12: Extent to which COVID-19 Negatively Affected Businesses in CATHSSETA Sub-Sectors

Note: Percentages in the above graph may not add up to 100% due to rounding off

As can be seen in the figure above, the majority of respondents in each of the CATHSSETA sub-sectors indicated that their business was negatively affected by the COVID-19 pandemic.

Overall, it can be seen that businesses from the Tourism and Travel Services and the Hospitality sub-sectors were the hardest hit by the pandemic, with 98% and 95% of businesses, respectively, indicating that they were negatively affected by the pandemic. It was reported that businesses in these sub-sectors were unable to

operate during the COVID-19 pandemic, as business activities came to a halt during the national lockdown. This affected businesses' revenue as a result of the cancellation of client bookings.

"We are in the travel industry, so we were hit the hardest as all travel and accommodation came to a halt, so we had zero income for that period of hard lockdown. We also had cancellations of all the initial bookings that happened. It was devastating."

(Employers Interview, 2022)

Industry experts that were consulted during the study attested to the detrimental impact that the COVID-19 pandemic had on businesses in the Travel and Tourism sub-sector. It was added that tour operators were unable to conduct business for over a year and had to issue refunds to customers following cancellations of bookings.

"The COVID-19 pandemic destroyed them, very much. We work with tour operators and products. The tour operators did not have any business for 18 months and had to refund people because of cancellations on bookings."

(Industry Experts Interview, 2022)

With regard to the impact of the pandemic on the Sports, Recreation and Fitness sub-sector, 86% of respondents from the sub-sector indicated that their business was impacted significantly to extensively. As per the desk-based research, it was noted that establishments such as gyms had to close during the pandemic. In an attempt to attract customers, gym owners reduced their monthly fees, however, it was found that stakeholders could still not afford the reduced cost.

"My organisation stood still because the gyms closed. Our big ones such as Virgin Active were also closed, so nothing really happened during that period. [Customers'] affordability was a problem. Even if we asked a small fee, it was still difficult at the time because nobody knew how to budget or what could happen during the COVID-19 period."

(Employers Interview, 2022)

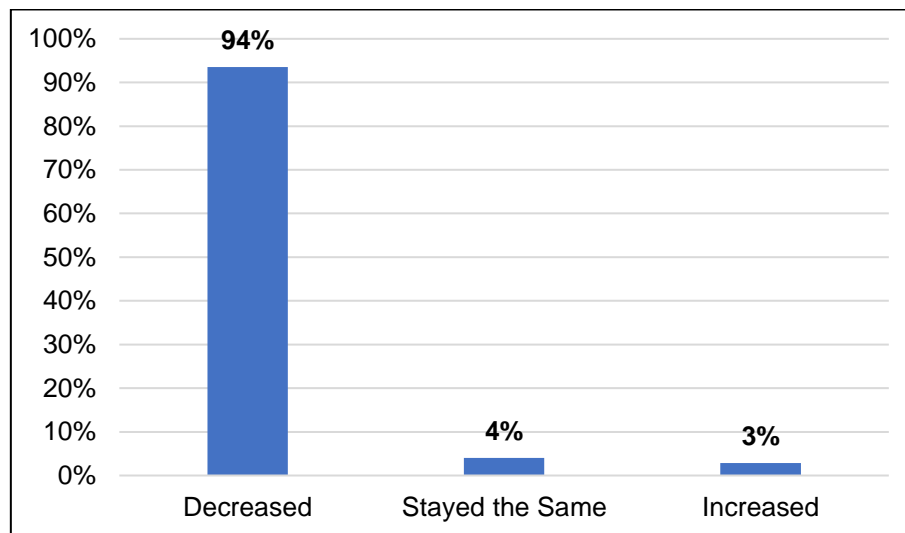
Key Finding

Overall, 93% of respondents indicated that they were negatively impacted by the COVID-19 pandemic. Businesses in the Tourism and Travel Services and Hospitality sub-sectors were the hardest hit during the pandemic with businesses in the Tourism and Travel Services sub-sector and the Hospitality sector indicating that they were not able to operate during the hard lockdown and had to cancel/refund bookings, whilst businesses in the Sports, Recreation and Fitness sub-sector, such as gyms, were unable to operate during the COVID-19 pandemic despite reducing their monthly subscription fees.

5.2.1 Impact of COVID-19 on Revenue

In order to understand the impact of COVID-19 on businesses within the CATHSSETA sub-sectors, respondents were requested to indicate the extent to which their businesses' revenues had increased, decreased, or stayed the same. The figure below illustrates the results.

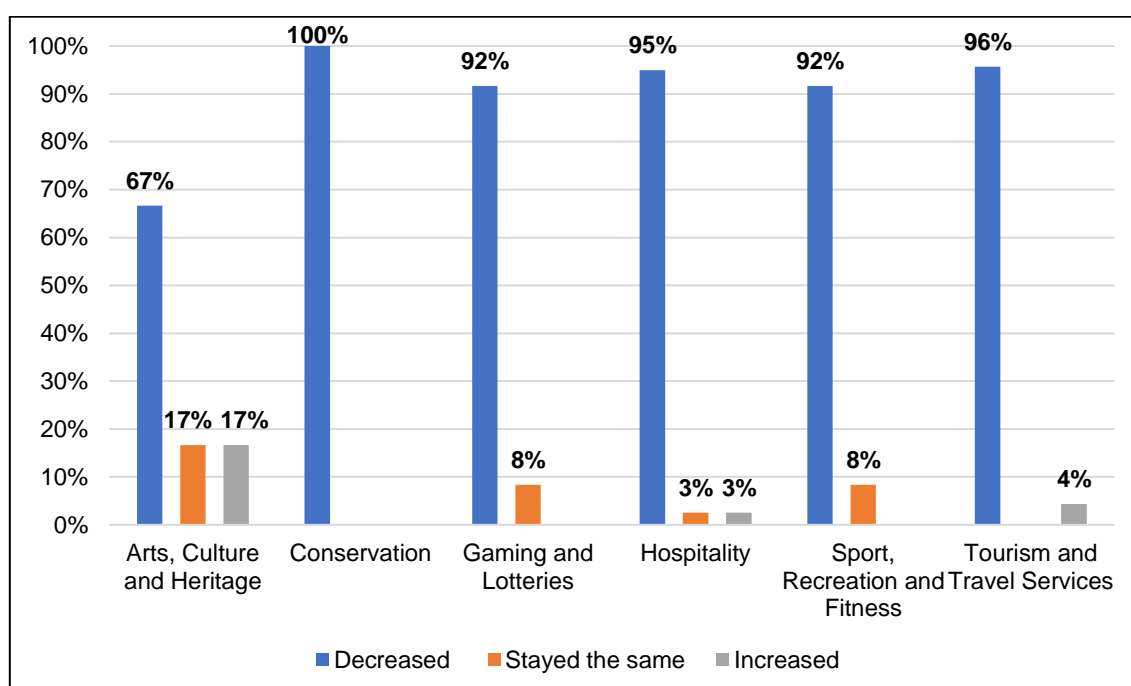
Figure 5-13: Extent to which Businesses' Revenue Increased or Decreased



Note: Percentages in the above graph may not add up to 100% due to rounding off

As can be seen above, 94% of respondents across all CATHSSETA sub-subsectors indicated that their business' revenue decreased as a result of the COVID-19 pandemic. Furthermore, 4% of respondents reported that their revenue stayed the same, while only 3% of respondents indicated that their business' revenue increased.

In order to gain an in-depth understanding of the impact of COVID-19 on businesses' revenue, the survey results were analysed at a sub-sector level to indicate the impact of the COVID-19 on revenue per sub-sector. The results are illustrated in the figure below.

Figure 5-14: Extent to which Businesses' Revenue Increased or Decreased per Sub-Sector

Note: Percentages in the above graph may not add up to 100% due to rounding off

As can be seen in the figure above, businesses in the Conservation (100%), Tourism and Travel Services (96%) and Hospitality (95%) sub-sectors reported minimal to significant decreases in their revenue as a result of the COVID-19 pandemic. Contrastingly, businesses that reported an increase in their revenue included 17% from the Arts, Culture and Heritage sub-sector, 3% from the Hospitality (3%) sub-sector and 4% from the Tourism and Travel Services sub-sector.

Industry experts noted that some businesses in the Conservation sub-sector were not able to generate an income for the past 2 years, and, as such, loan repayment reliefs were granted by the banks. However, given that the lockdown restrictions are being eased, banks are now requesting payments. The businesses, however, are unable to meet the repayments, as a result of their decreased revenue.

“Conservation income streams have dried up. Businesses having been without any solid income for over two years and have gotten payment holidays from their banks, and banks are now saying since we are coming out of the pandemic, funds need to be paid back.”

(Industry Experts Interview, 2022)

One of the respondents from the Gaming and Lotteries sub-sector, a supplier of gambling machines, disclosed that their organisation was unable to generate revenue during the COVID-19 pandemic, due to their customers closing.

“We supply gambling machines to destination based, licensed establishments. When the companies shut down, they lost revenue, so they could not pay any of their creditors. They did not have any money to get anymore products from us. We saw a decline revenue, so that impacted us from a cash flow perspective.”

(Employers Interview, 2022)

The restrictions on movement that were in place during the COVID-19 pandemic also had a negative impact on businesses in the Tourism and Travel Services sub-sector, whereby 96% of respondents reported a decrease in revenue as a result of the COVID-19 pandemic. Respondents indicated that their company was negatively impacted by the loss of international clients, such as those from the UK, due to the closing of the borders.

“The tourism sector got a hard knock, our company mainly takes clients from the UK and unfortunately when the borders were closed, we had little income.”

(Employers Interview, 2022)

Key Finding

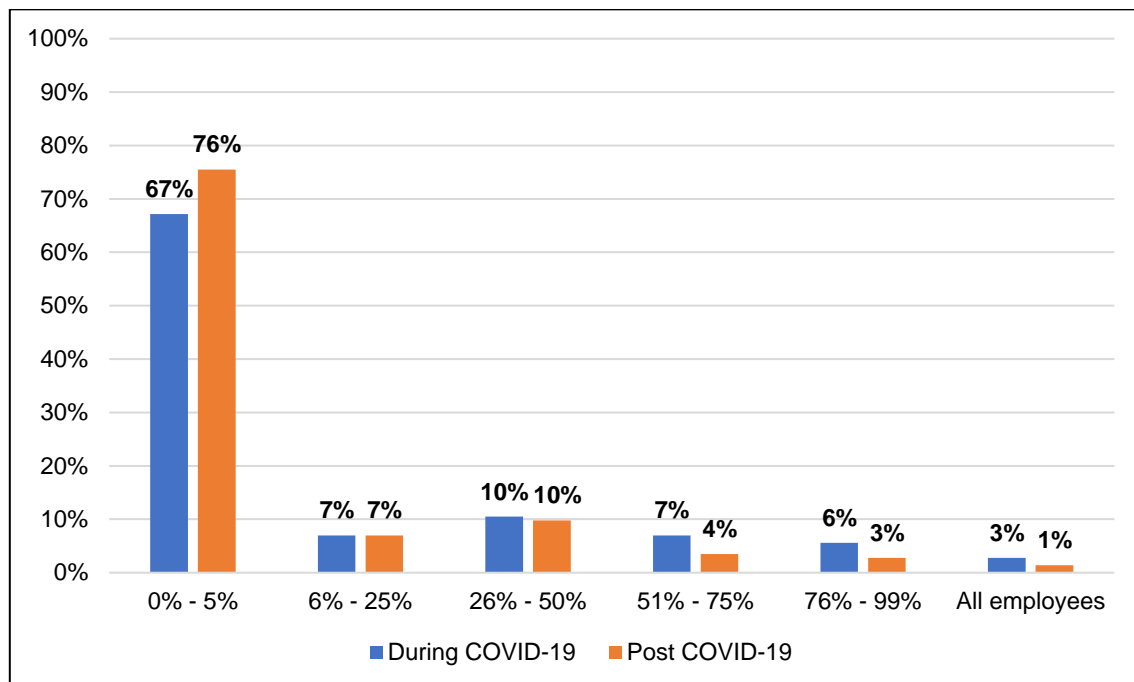
The COVID-19 pandemic impacted the revenue of businesses across all CATHSSETA sub-sectors significantly. It was found that in five of the six CATHSSETA sub-sectors, more than 90% of respondents reported minimal to significant decreases in their revenue. In the Tourism and Travel sub-sector this decrease appeared to be attributed to a lack of international visitors.

5.2.2 Impact of COVID-19 on Remote Working

Desk-based research highlighted that many businesses were working remotely during the pandemic as a result of restrictions on movement, with many employees indicating that they had become accustomed to the new approach (News24, 2021).

This study sought to determine what the impact of COVID-19 was on remote working during and post the pandemic. Stakeholders were requested to indicate the proportion of their employees that were working remotely during the pandemic, as well as the proportion that were expected to continue working remotely after the pandemic. The figure below illustrates the results.

Figure 5-15: Percentages of Employees Working Remotely during the Pandemic Compared to Employees Expected to Continue Working Remotely Post the COVID-19 Pandemic



Note: Percentages in the above graph may not add up to 100% due to rounding off

As can be seen above, the majority of businesses (67%) currently have between 0% and 5% of their employees working from home, while 76% expect the same proportion of employees to continue working from home post COVID-19. The percentages of respondents with between 6% and 50% of their employees currently working from home and those expecting the employees to continue working from home post COVID-19 remained constant at 17%. Furthermore, the percentages of respondents expecting more than 51% of their employees to continue working from home post COVID-19 decreased to 8%, from the 16% of employees that were working from home during COVID-19.

These findings were corroborated by stakeholder interviews, where it was noted that several businesses' employees have returned to the workplace and remote work is only considered upon special requests from staff.

"Everyone is back at work, not working remotely unless there is a special request from the staff, which has not happened yet."

(Employers Interview, 2022)

Some respondents indicated that the transition to working from home had resulted in their businesses not being able to conduct some operations, such as assessments, as these were required to be conducted physically.

“We still have SETAs who are not back to work. Since they are working from home, it has been very slow from us... The pandemic was here but the contract did not change. We still had to look for work placements. We must physically go to table assessments, or learners would not have assessments anymore.”

(SDFs & Training Providers Focus Group, 2022)

Key Findings

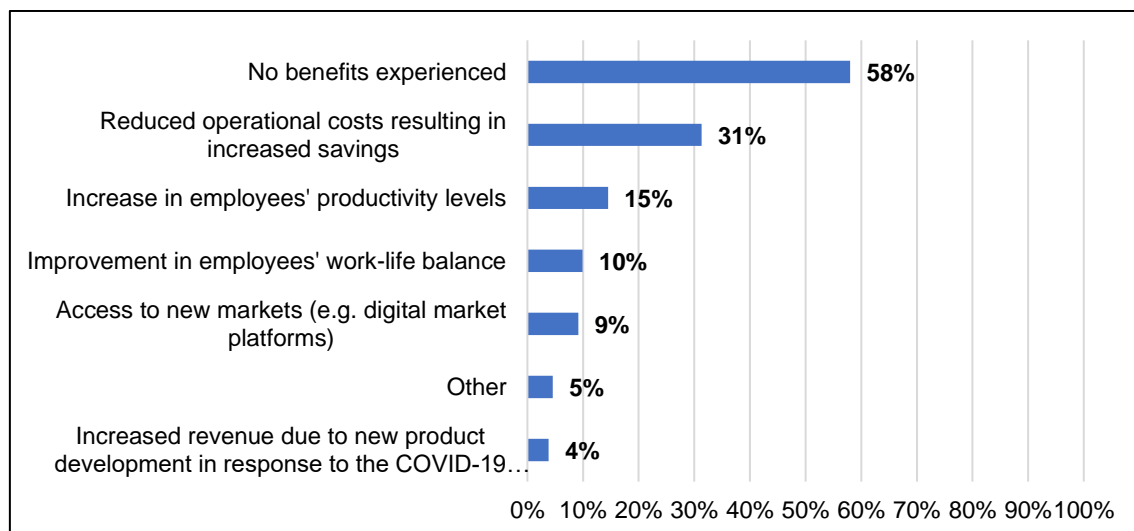
It was found that the majority of businesses (67%) only have 0% - 5% of their workforce currently working remotely with remote work only being considered upon special requests from staff in certain businesses. It was further noted that the majority of businesses (76%) expect only 0%-5% of their workforce to continue working remotely post the COVID-19 pandemic. This indicates that businesses in the CATHSSETA sub-sectors may prefer to operate with employees on site. This may be as a result of the nature of their operations which require physical interactions.

5.2.3 Benefits Experienced as a Result of the COVID-19 Pandemic

Despite the negative impact of COVID-19 on the global economy, it was noted in the Literature Review that some businesses from different sectors had experienced certain benefits as a result of the pandemic (Swiss School of Business Research, 2021).

Respondents in this survey were requested to indicate the benefits observed by their businesses during the pandemic. The results are illustrated in the figure below.

Figure 5-16: Benefits Experienced as a Result of the COVID-19 Pandemic



Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As can be seen in the figure above, 58% of respondents indicated that their businesses did not experience any benefits as a result of the COVID-19 pandemic.

“None [were experienced].”
(Employers Survey, 2022)

On the other hand, 31% of respondents noted that their organisation experienced reduced operational costs resulting in increased savings. This was supported by consulted respondents who elaborated that their businesses were able to reduce expenses such as travel and accommodation given that fewer employees underwent training during the pandemic.

“We benefitted in training less people as we saved money in the travel, and accommodation costs.”
(SDFs & Training Providers Focus Group, 2022)

15% of respondents indicated that they experienced an increase in employees’ productivity levels as a result of working from home. Stakeholders were of the view that most companies had transitioned to remote working and experienced benefits as a result.

“Most companies have moved to working from home and have found that it is working better for them.”
(Learners Focus Group, 2022)

A stakeholder indicated that during lockdown they received a number of resignations from employees, which resulted in the reallocation of tasks to remaining employees. As a result, it was brought to the organisation’s attention that the department could deliver the same amount of work with fewer personnel, which was a benefit the organisation would not have realised prior to the lockdown.

“I think ever since we started working from home, in our Finance department we do not need as many positions as we thought we did. We lost two or three people through resignations in our finance department during lockdown and the department has not been increased with more people, but they are still managing. Although we do not want to overload the staff that we do have, but I think we can manage with these people and before lockdown we would not have been able to come to this realisation.”
(SDFs Interview, 2022)

Moreover, 9% of the respondents indicated that they benefited from the access to new markets. Some stakeholders stated that their organisation adopted cost-effective online tools which they believed would benefit their organisation in the long term, for instance, the use of online platforms.

“For us we started futureproofing using available and cost-effective online tools...we started to develop platforms accessible to learners and started loading training online to allow learners to do the training directly themselves.”
(Employers Focus Group, 2022)

Stakeholders were of the view that, while onsite training is still required, the pandemic has presented businesses and training providers with the opportunity to transition to new and innovative approaches to conducting work and learning.

“COVID has taught us new ways of doing things – there is now remote learning... COVID has come up with an innovative way of training. Onsite training cannot be avoided, e.g., tour guides, they have to go outside to work. But for non-contact training like reading and writing then online saves a lot for the provider as well.”

(Employers Focus Group, 2022)

It is also to be noted that 5% of respondents believed that they experienced ‘Other’ benefits as a result of the COVID-19 pandemic. When prompted, respondents from the Gaming and Lotteries sub-sector indicated that their organisations experienced an increase in their operations (number of betting tickets sold) during the lockdown period.

“Before, people did not bet that much, but now because of access to internet and staying at home, there was an increase in my number of tickets...”

(Employers Survey, 2022)

Positive Practices

- Businesses that experienced benefits as a result of the COVID-19 pandemic cited benefits such as reduced operational costs that resulted in increased savings; an increase in the productivity levels of employees; and an improvement in employees’ work-life balance.
- It was noted that as a result of the pandemic, some businesses had the opportunity to explore innovative avenues to conduct their business activities more efficiently in the long run. For instance, several training institutions developed and introduced online learning platforms to provide access to their learners.
- Some businesses that experienced employee resignations during the pandemic noted that fewer staff were required to conduct operations such as finance related duties, thus reducing company costs.

Key Findings

It was found that the majority of surveyed businesses did not experience any benefits as a result of the COVID-19 pandemic.

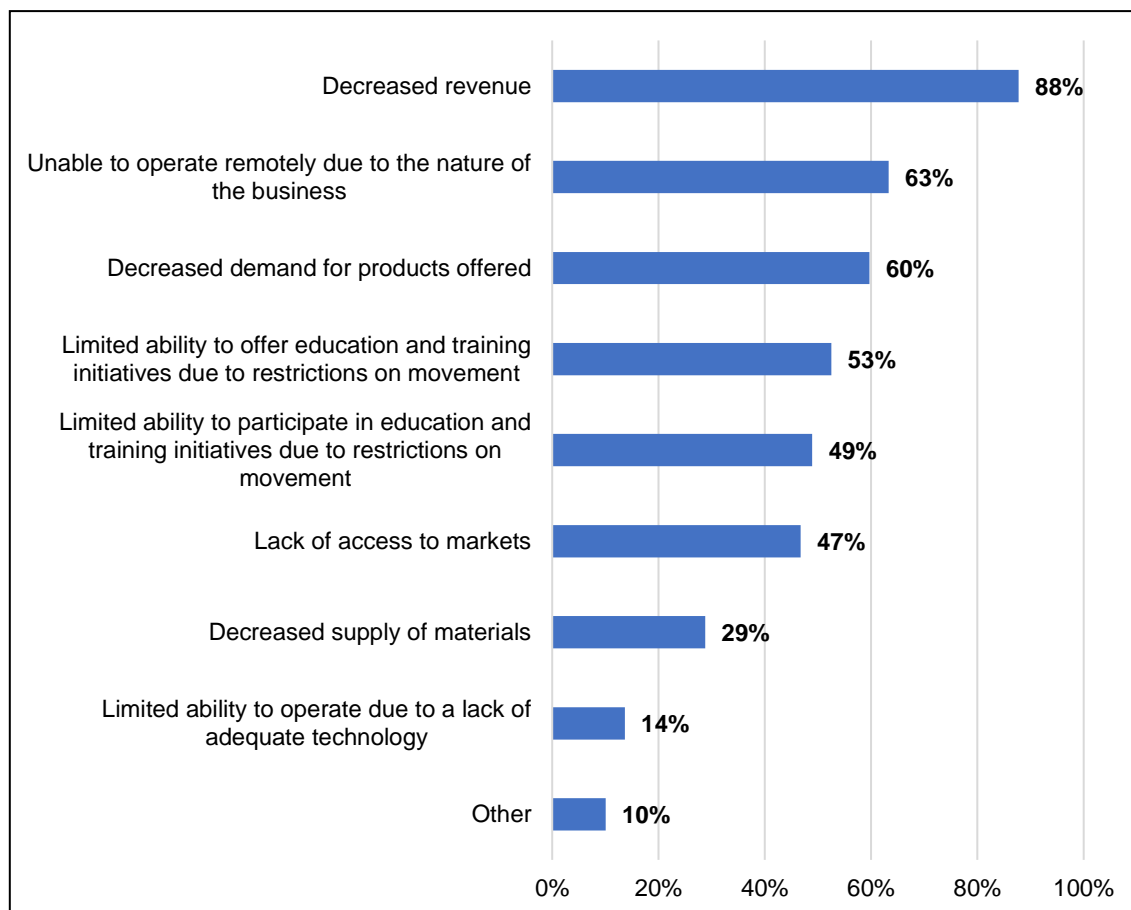
5.2.4 Challenges Faced as a Result of the Pandemic

This section provides an overview of the challenges faced by businesses during the COVID-19 pandemic, as well as an overview of the perceived time it would take for businesses to recover from the impact of the pandemic.

5.2.4.1 Challenges Faced by Businesses During the Pandemic

The figure below provides a breakdown of the challenges faced by businesses during the pandemic.

Figure 5-17: Challenges Experienced by Businesses during the COVID-19 Pandemic



Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As can be seen in the figure above, 88% of respondents indicated that their business experienced decreased revenue during the pandemic. Stakeholders from the Gaming and Lotteries sub-sector were of the view that they experienced a decline in their revenue as their customers had closed their establishments as a result of a loss of revenue.

“We supply gambling machines to destination based, licensed establishments. When the companies shut down, they lost revenue and they could not pay any of their creditors... So, we saw a decline revenue.”

(Employers Interview, 2022)

60% of respondents indicated that their businesses experienced a decrease in demand for products offered. Stakeholders from the Tourism and Travel Services sub-sector indicated that some businesses ceased operations due to the decreased demand in the market.

“I have seen several people, in fact a provider under CATHSSETA scope in Pretoria, completely shut down their travel consultant training academy because there was lack of demand.”

(Training Provider Interview, 2022)

A further 53% of respondents indicated that their business had limited ability to offer education and training initiatives due to restrictions on movement. Some stakeholders from the Sports, Recreation and Fitness sub-sector indicated that the training they had planned had to be moved online, however, they could not find any assessors to conduct virtual assessments.

“We had training planned but it had to be moved online. Some tutors were not comfortable tutoring online. So, I think those are the skills that are needed, to be able to tutor online. We could not find assessors that could assess online.”

(Training Provider Interview, 2022)

49% of stakeholders indicated that they had limited ability to participate in education and training initiatives due to restrictions on movement. A representative from the Sports, Recreation and Fitness sub-sector indicated that Regional Performance Centres’ (“RPC”) coaches could not operate to their maximum capacity due to closure of schools.

“Yes, when COVID hit, we had a period of 3 months when we worked remotely, that was quite challenging. When we returned to the office, the hubs and RPC coaches could not function so well as schools were closed at the time.”

(Employers Interview, 2022)

Additionally, 29% of respondents indicated that there was a decreased supply of materials, which according to some respondents, was a result of reduced supplier schedules and routes.

“Suppliers’ reduced schedules and routes [reduced our supply].”

(Employers Survey, 2022)

10% of respondents indicated that they experienced ‘Other’ challenges. These included challenges such as the inability to trade due to lockdown regulations.

“We were legally unable to trade due to lockdown rules.”

(Employers Survey, 2022)

In the Sports, Recreation and Fitness sub-sector, a key lockdown regulation which disrupted the operations of businesses included the restrictions imposed on spectators’ attendance at sports events.

“Restrictions on the industry whereby no spectators were allowed to sports events. Now with changed legislation only spectators that are vaccinated may attend.”

(Employers Survey, 2022)

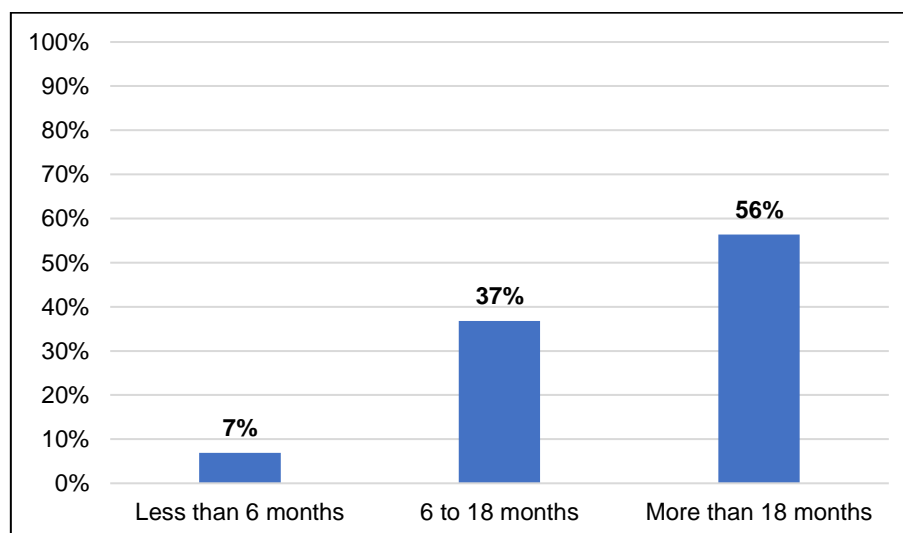
Key Finding

- It was found that the majority of stakeholders experienced challenges during the pandemic. Some stakeholders, including those within the Gaming and Lotteries and Tourism and Travel Services sub-sectors, experienced a loss of revenue due to a loss of customers, as well as declines in demand and supply for products offered.
- It was noted that school closures during the pandemic negatively impacted the ability of RPC coaches within the Sports, Recreation and Fitness sub-sector to operate at maximum capacity. Additionally, it was found that assessments in the Sports, Recreation and Fitness sub-sector could not be conducted due to a lack of assessors to conduct them virtually.
- Some respondents indicated that they experienced challenges related to COVID-19 regulations, including the inability to operate as well as restrictions on movement.

5.2.4.2 Recovering from the Impact of COVID-19

The graph below provides a breakdown of how long stakeholders believed it would take businesses in the CATHSSETA sub-sectors to recover from the impact of the pandemic.

Figure 5-18: Time Required for Businesses to Recover from the COVID-19 Pandemic



The majority of respondents (56%) indicated that businesses would require more than 18 months to recover from the impact of the pandemic. Stakeholders from the Hospitality sub-sector indicated that businesses would not recover unless there is an increase in customers in their hotels. They further added that they require the assistance of the local tourism agencies to boost activities in their hotels.

“But basically, we need business. We need our local tourism agencies to bring in business from other provinces to our hotels.”

(SDF Interview, 2022)

Some stakeholders from the Hospitality sub-sector believed that re-advertising cancelled tenders would present them with the opportunity to increase revenue and hence, recover from the challenges faced during the pandemic.

“If cancelled catering tenders could be advertised, then there could be an opportunity to recover.”

(Employers Survey, 2022)

37% of respondents indicated that their businesses would require between 6 to 18 months to recover from the impact of the pandemic. When prompted to expand on how they believed businesses could recover from the pandemic in the medium-term, some respondents from the Gaming and Lotteries and Tourism and Travel Services sub-sectors indicated that financial assistance would be key.

“I think financial relief would help as a lot of businesses are micro in nature. They rely on day-to-day finances to survive.”

(Industry Expert Interview, 2022)

In addition to the above, stakeholders from the Arts, Culture and Heritage sub-sector were of the view that recovery in the short to medium term may be achieved by adopting new avenues to marketing, such as the use of technology to produce professional videos that would be posted on virtual platforms, which may also allow businesses in their sub-sector to reach a wider audience.

“Technology should be one of the avenues that we explore. Trying to get our content on video, professionally, and allowing theatre to reach wider audiences.”

(Employers Interview, 2022)

It can also be seen that only 7% of respondents indicated that their businesses would require less than 6 months to recover from the impact of the COVID-19 pandemic. These respondents were requested to outline the measures that their businesses had already put in place to recover in the short term (0 - 6 months). Some respondents indicated that as soon as lockdown restrictions were eased and staff were allowed to return to work, they brought their employees back on reduced working hours, in an attempt to recover their revenue.

“As soon as we were allowed to start opening the businesses, we brought our staff back. There was still curfew but to recoup our revenue and to get staff earning a salary again we brought them back on reduced hours so they can earn an income.”

(SDF Interview, 2022)

Other stakeholders indicated that they reduced their rates in order to encourage domestic tourists to visit their destinations.

“We have had to discount our rates to encourage the local South African market to travel to our destinations.”

(Employers Interview, 2022)

Positive Practice

Respondents who believed that their businesses would be able to recover from the challenges faced during the pandemic, in the short term, indicated that they had put measures in place to facilitate this recovery, this included reducing their booking rates to encourage travellers to visit their businesses as soon as lockdown restrictions were lifted.

Key Findings

- It was found that the majority of stakeholders, including representatives from the Hospitality sub-sector, expect their businesses to fully recover from the impact of the pandemic in the long term. These stakeholders were of the view that assistance would be required from local tourism agencies to boost the number of customers visiting hotels. They also believed that tenders which were cancelled as a result of pandemic should be re-advertised. These measures may give businesses an opportunity to increase their revenue and recover from the challenges faced.
- Some respondents were of the view that it would take 6 to 18 months for their organisation to recover from the impact of the pandemic. Stakeholders indicated that increased financial support may assist with this recovery. Other stakeholders, from the Arts, Culture and Heritage sub-sector, believed that exploring new marketing avenues such as the use of online platforms to publish their professional videos would allow their business (theatres) to reach wider audiences and would ultimately help them recover from the impact of the pandemic.

5.2.4.2.1 The Economic Reconstruction and Recovery Plan

In Section 4.4.1, it was indicated that the South African government introduced the ERRP in an attempt to stimulate equitable and inclusive growth. This was in response to the expected increase in inequality and widening of poverty as a result of the pandemic.

During interviews and focus groups, stakeholders were requested to indicate whether they were aware of the ERRP and what contribution they believe businesses within CATHSSETA sub-sectors could make to the implementation of the ERRP.

Interviews and focus groups revealed that the majority of stakeholders, such as those from sub-sectors including the Sports, Recreation and Fitness and Conservation sub-sectors, appeared not to be familiar with the ERRP. A stakeholder from the Hospitality sub-sector indicated that they had limited knowledge with regard to the ERRP but was of the view that businesses within the Hospitality sub-sector did not benefit from the plan.

“I have heard of some stuff related to this, even though not very specific. Businesses within the hospitality sector do not get the relevant support but should be at the forefront of economic recovery.”

(Employers Interview, 2022)

This was supported by another stakeholder from the Gambling and Lotteries sub-sector who was of the view that the ERRP only caters for some sub-sectors, specifically Tourism and Travel Services, and not others such as the gambling and liquor industries.

“Yes, it only caters for the tourism sector, because that is where bulk of the GDP money comes from, but gambling and liquor has no reliefs, so those guys will continue to suffer as they are seen as sin tax.”

(Industry Expert Interview, 2022)

Despite the above, one stakeholder from the Arts, Culture and Heritage sub-sector indicated that they were in partnership with others partners within the CCIs in an attempt to mobilise investments and resources to support the craft sector.

“From our side, we are in partnership with other partners in the CCIs to work on mobilising investments and resources into high impact interventions to support the craft sector.”

(Industry Expert Interview, 2022)

Key Findings

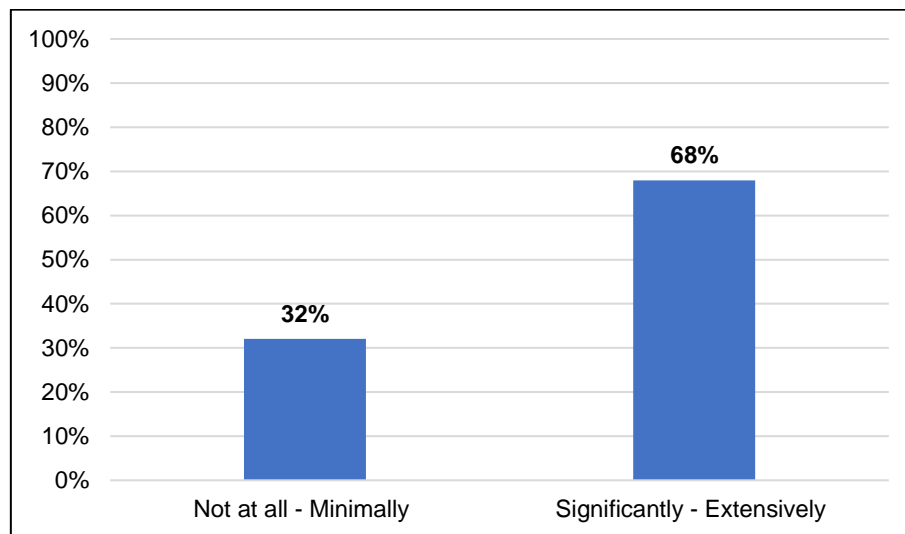
It was found that stakeholders from sub-sectors such as Hospitality, Sport, Recreation and Fitness and Conservation appeared to have limited to no knowledge with regard to the ERRP.

5.2.5 Adapting to Challenges Caused by the COVID-19 Pandemic

The following section provides an overview of the extent to which businesses across CATHSSETA sub-sectors were able to adapt to the COVID-19 pandemic. Additionally, it explores the support that businesses require to recover from the COVID-19 pandemic; as well as the support that has been provided by Government or Private Sector during the pandemic.

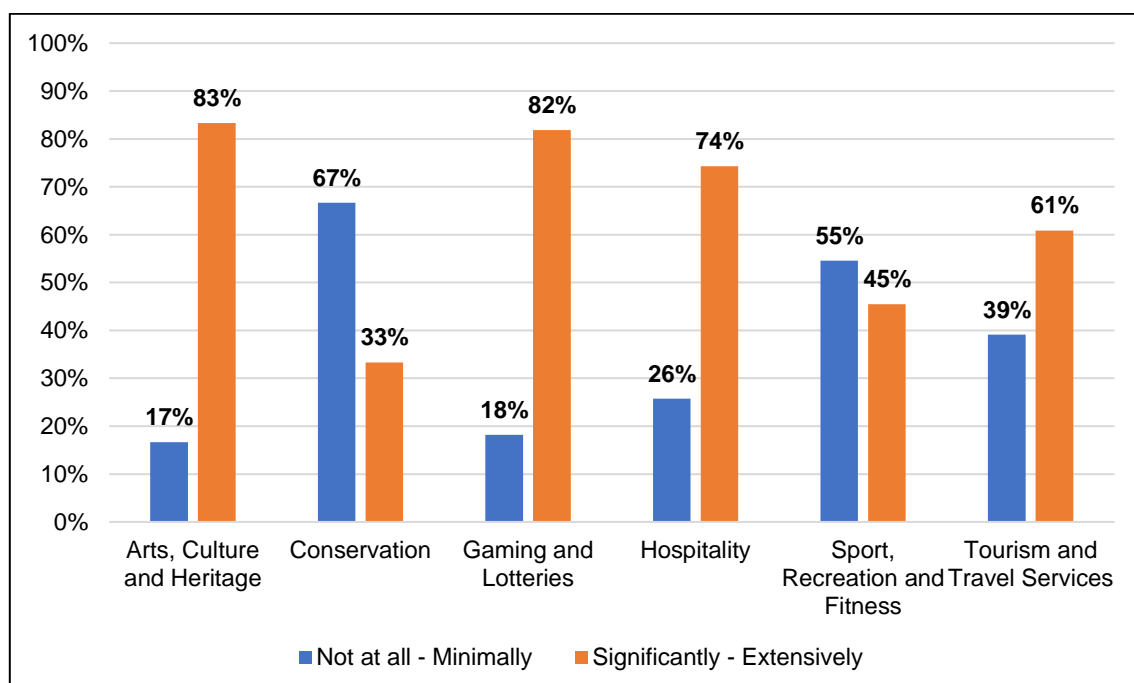
5.2.5.1 Businesses' Ability to Adapt to the Pandemic

Respondents were requested to indicate to what extent their business was able to adapt to the COVID-19 pandemic. The results are presented in the figure below.

Figure 5-19: Extent to which Businesses were Able to Adapt to the Pandemic

As can be seen above, 32% of respondents indicated that their businesses were not able to adapt to the pandemic at all or were only able to adapt to a minimal extent. Contrastingly, 68% of respondents indicated that their businesses were able to significantly to extensively adapt, to the COVID-19 pandemic.

To gain a better understanding of the above, an analysis of the extent to which businesses were able to adapt to the COVID-19 was conducted at sub-sector level. The figure below illustrates these findings.

Figure 5-20: Extent to which Businesses in CATHSSETA Sub-Sectors were Able to Adapt to the Pandemic

As can be seen above, the majority of respondents in the Arts, Culture and Heritage (83%); Gaming and Lotteries (82%); Hospitality (74%); and Tourism and Travel

Services (61%) sub-sectors indicated that their businesses were able to adapt to the COVID-19 pandemic.

A respondent from the Hospitality sub-sector noted that it was challenging for their business to adapt to the pandemic. Nonetheless, they were able to adapt by providing training to staff on relevant COVID-19 procedures, ensuring that all protocols were followed and restructuring their restaurant to meet social distancing requirements.

“Yes, we had to [adapt], our doors are still open. We trained staff on all of the COVID-19 procedures and we followed all protocols, restructured the restaurant to meet social distancing requirements and so forth. It was a huge challenge and required a change of thinking.”

(Employers Interview, 2022)

Furthermore, a respondent from the Arts, Culture and Heritage sub-sector noted that their business adopted several strategies in order to adapt to the COVID-19 pandemic. This included the hosting of outdoor and virtual events.

“We have reopened our galleries and have incorporated more outdoor events and tried things we do not typically do. We will keep doing such events, and virtual ones until the pandemic falls away.”

(Employers Interview, 2022)

A respondent from the Gaming and Lotteries sub-sector indicated that their business was able to shift to an online system, with employees working from home.

“Everything is shifting online but home based. I am able to do it [gambling and lotteries] online, but my guys that used to come to the office now work at home. I think it easier to manage online than it is to manage physical employees.”

(Employers Interview, 2022)

Furthermore, respondents from the Tourism and Travel Services sub-sector indicated that they were able to adapt by shifting their target market from international tourists to domestic travellers, although they still experienced revenue losses.

“We pivoted quite quickly to focus on more domestic travel and products, but we did lose a great deal of revenue.”

(Employers Interview, 2022)

The results of the survey also indicate that 45% of respondents from the Sports, Recreation and Fitness sub-sector were able to adapt to the pandemic. A stakeholder indicated that the football industry was able to adapt to the pandemic by introducing a “bubble” where athletes and other members of staff would be isolated from other members of society and still be able to play. Additionally, athletes are required to be tested for COVID-19 before every match.

“When lockdown started, our players had to go into what is called a ‘bubble’ for the rest of the season, which was an expensive exercise as there were no fans coming into the stadium. We are now at a point where we can move a bit, but every time there is a match players need to be tested.”

(SDFs Interview, 2022)

The results further indicate that majority of surveyed businesses from the Conservation sub-sector (67%), were either unable to adapt or adapted minimally to the COVID-19 pandemic. A respondent from the Conservation sub-sector indicated that their business was not able to adapt to the pandemic owing to a lack of ICT resources and their organisation not being ready to change its operating methods.

“The organisation was not ready to adapt to new ways of doing things and also [a] lack of ICT resources made it difficult for the organisation to adapt.”

(Employers Survey, 2022)

Positive Practices

- It was found that businesses from the Hospitality sub-sector were able to adapt to the pandemic by providing training on COVID-19 protocols to staff, following protocols and restructuring their restaurants to meet social distancing requirements.
- It was found that other businesses were able to adapt to the pandemic by modifying their business models. Respondents from the Arts, Culture & Heritage sub-sector indicated that they hosted outdoor and virtual events in an attempt to adapt to the pandemic, while businesses from the Gaming and Lotteries sub-sector were able to adapt by shifting to online platforms for the placement of bets and playing lotteries. Businesses from the Tourism and Travel Services sub-sector were able to adapt by targeting domestic travellers instead of international ones.

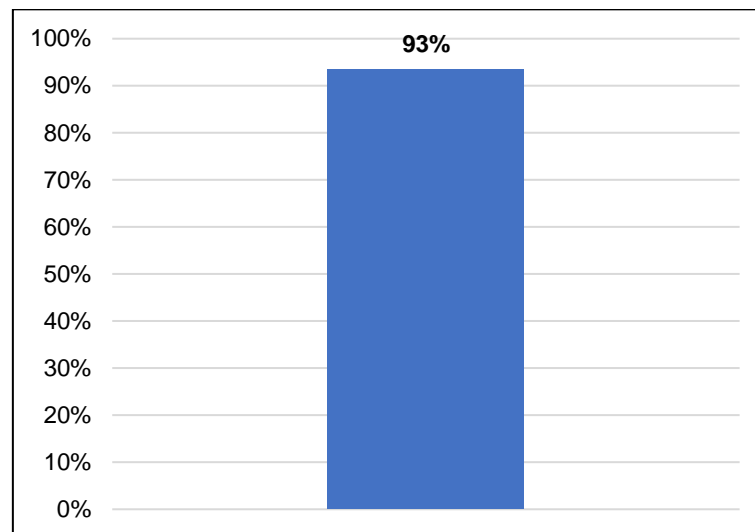
Key Findings

It was found that the majority of Businesses in the Conservation and Sport, Recreation and Fitness sub-sectors were not able to adapt to the pandemic. A stakeholder from the Conservation sub-sector indicated that their organisation was unable to adapt to the COVID-19 pandemic due to a lack of ICT resources and their organisation not being ready to adopt new methods of operating.

5.2.5.2 Support Required to Recover from the Impact of COVID-19

Respondents were requested to indicate the extent to which they believed that acquiring the relevant support would enable their business to adapt to and recover from the COVID-19 pandemic. The results are illustrated in the figure below.

Figure 5-21: Extent to which Businesses Agree that Acquiring the Relevant Support would Enable them to Adapt to and Recover from the COVID-19 Pandemic



As illustrated in the figure above, 93% of businesses agreed that acquiring relevant support would enable their businesses to adapt to and recover from the COVID-19 pandemic. This was supported by a respondent from the Sports, Recreation and Fitness sub-sector who believed that acquiring support may enhance their business's operation. It was further added that receiving information regarding the available support would allow their business to work towards receiving available support.

"Of course, if we can get information about getting support then we can get going on that and improve operations."

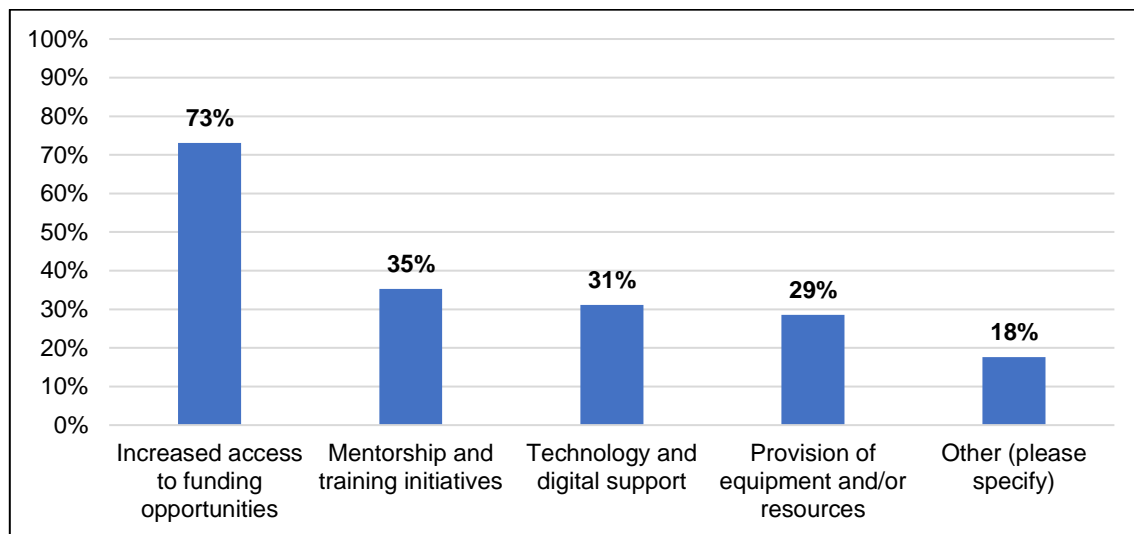
(Employers Interview, 2022)

Stakeholders from the Arts, Culture and Heritage sub-sector were also of the view that COVID-19 had resulted in their experience being rendered no longer useful and so acquiring relevant support would allow them to adopt measures to swiftly react and adapt to events such as COVID-19.

"I think so, it would make us nimbler. COVID-19 just rendered our 40 years' experience obsolete. So, we need to develop a second model that potentially [helps us] adapt to catastrophic events like COVID-19."

(Employers Interview, 2022)

Furthermore, respondents were requested to indicate the type of support that would enable their organisation to adapt to and recover from the COVID-19 pandemic. The results from the survey are illustrated in the figure below.

Figure 5-22: Support Required by Businesses to Recover from the COVID-19 Pandemic

Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As can be seen in the figure above, overall, 73% of respondents across CATHSSETA sub-sectors reported that increased access to funding opportunities would enable their business to recover from the COVID-19 pandemic. This was followed by 35% who indicated that they required mentorships and training initiatives, and 31% who required technology and digital support.

Furthermore, 29% indicated that their business required the provision of equipment and/or resources, while 18% indicated that their business required 'Other' support. These respondents were requested to expound on their response. Some respondents from the Tourism and Travel Services sub-sector were of that view that Polymerase Chain Reaction ("PCR") test requirements for international arrivals should be eased in order to encourage international tourists to visit South Africa.

"We need all regional borders to drop PCR test requirements for international arrivals."

(Employers Survey, 2022)

"Lifting of visitor testing restrictions [would] make it easier for tourists to come to SA."

(Employers Survey, 2022)

The results above were analysed at a sub-sector level in order to explore the support required by each CATHSSETA sub-sector. The results are provided in the table below.

Table 5-1: Support Required by CATHSSETA Sub-Sectors

Support Required	Arts, Culture and Heritage	Conservation	Gaming and Lotteries	Hospitality	Sport, Recreation and Fitness	Tourism and Travel Services
Increased access to funding opportunities	27%	55%	33%	41%	32%	38%
Mentorship and training initiatives	20%	9%	0%	21%	14%	24%
Technology and digital support	27%	27%	33%	15%	21%	9%
Provision of equipment and/or resources	20%	9%	11%	15%	32%	6%
Other	7%	0%	22%	8%	0%	0%

As can be seen above, the support most required by the Conservation (55%), Hospitality (41%), Sport Recreation and Fitness (32%) and Tourism and Travel Services (38%) is increased access to funding opportunities, while the support most required by the Arts, Culture and Heritage (27%) and Gaming and Lotteries sub-sectors (33%) is also increased access to funding opportunities as well as technology and digital support.

This was supported by a respondent from the Hospitality sub-sector who explained that small businesses, did not have the necessary financial resources to adapt and operate during the pandemic.

“I think there are a lot of smaller not so well-established businesses who did not have the necessary [financial] resources to get through the pandemic. So yes, some financial backing would be very much needed.”

(Employers Interview, 2022)

A respondent from the Tourism and Travel Services sub-sector also added that their business was in need of financial support.

“I think financial support is the most ideal form of support.”

(Employers Interview, 2022)

14% of respondents in the Sports, Recreation and Fitness sub-sector indicated mentorships and training initiatives as a form of support required by their organisation. One of the respondents explained that there is a need for workshops to ensure that stakeholders have adequate information regarding the pandemic.

“From a medical perspective, if we could have workshops informing the people more as most people are ignorant about COVID-19, so that we can get more information even for our players to take back home.”

(Employers Interview, 2022)

It was noted that 15% of respondents from the Hospitality sub-sector were of the view that businesses require technological and digital support, while a further 15% of respondents indicated that there is a need for equipment and/or resources. One of the respondents noted that their organisation required assistance to be able to transition to an online approach and implement new teaching methods.

“I think the support would be an assistance in terms of a change to the approach in how we conduct training because it is all contact training. Other institutions have contact based and online based training. We are still trying to get into the space of online training.”

(Employers Interview, 2022)

Key Findings

- Several respondents across different sub-sectors indicated that their businesses required increased access to funding opportunities in order to adapt to and recover from the COVID-19 pandemic.
- Some respondents from the Sports, Recreation and Fitness sub-sector were of the view that there is a need for workshops to provide more information to workers about COVID-19.
- It was noted that businesses within the Hospitality sub-sector require assistance with regard to transitioning to online training in order to enable them to recover from the COVID-19 pandemic.
- Respondents from the Tourism and Travel Services sub-sector were of the view that PCR test requirements for international arrivals should be eased in order to make it easier for international tourists to visit to South Africa.

5.2.5.3 Support Provided to Businesses by Government or Private Sector

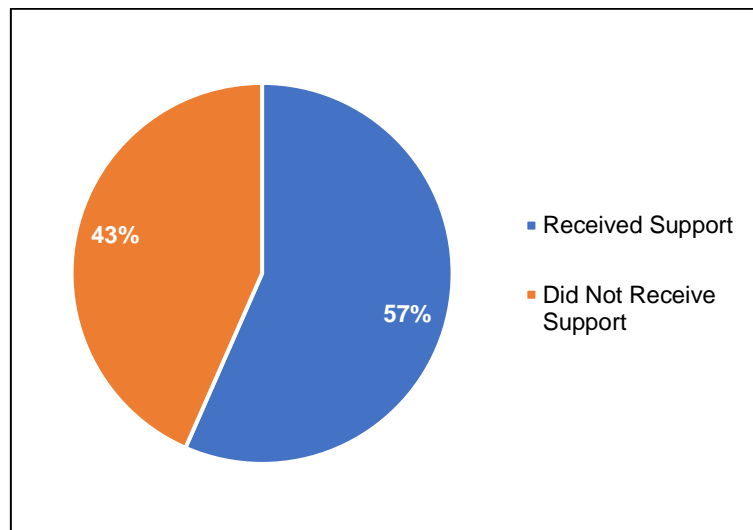
It was identified in the Literature Review that the government and private sector introduced and offered various forms of support to businesses across different CATHSSETA sub-sectors during the pandemic. The government in particular offered support through channels such as the Tourism Relief Fund and the DSAC Relief Fund. The Tourism Relief Fund offered a once-off grant to businesses within the Tourism sub-sector, capped at R50 000 (Department of Tourism, 2020). The DSAC Relief Fund, on the other hand, was established with the aim of supporting artists, athletes and technical personnel affected by the COVID-19 pandemic and was worth a total of R150 million. The fund was limited to beneficiaries within the Sports sub-sector who derive their income solely from specific sporting codes such as the South African Sport for the physically disabled, netball, and gymnastics (SANews, 2020).

Within the private sector, support was offered by businesses such as the BASA Artist Relief Grants. These funds provide support to the industry either financially, or in other forms such as through the provision of business skills and marketing expertise. Financial support was offered to individual South African artists diagnosed with and/or being treated for COVID-19. Artists experiencing a loss of income as a result of the impact of COVID-19 were also supported, with preference given to artists hospitalised as a result of being infected by the virus (BASA, 2021).

Further to the above, it is crucial to understand whether stakeholders have the required knowledge on the available support and if they were able to acquire any form of support from the government and the private sector during the pandemic, as well as what the intended and unintended consequences of this support was.

The figure below illustrates the proportion of surveyed stakeholders who received support from either the government or the private sector during the pandemic to those who did not receive any support.

Figure 5-23: Proportion of Surveyed Stakeholders who Received Support from Government or Private Sector

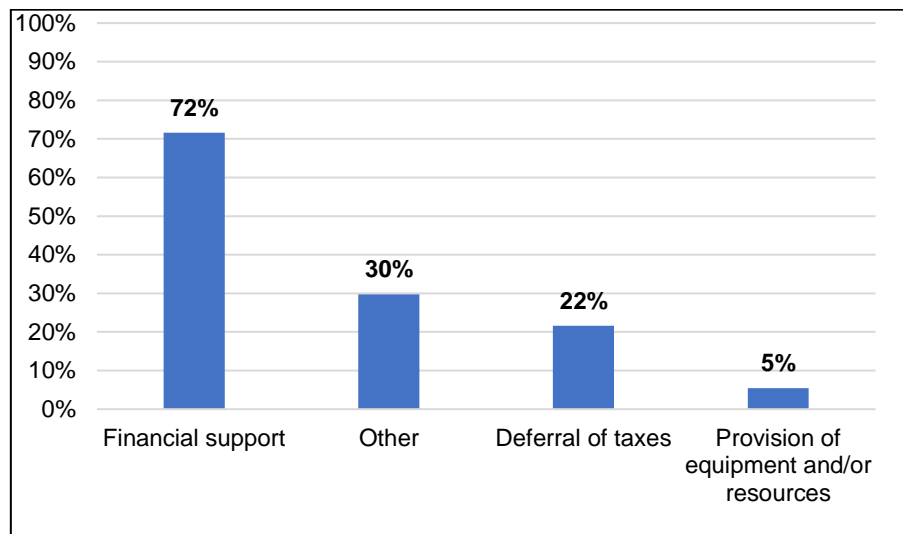


As can be seen in the figure above, 57% of respondents indicated that they received support either from the government or from the private sector, while 43% did not receive any support. Stakeholders indicated that businesses within some sub-sectors, such as those in the Tourism and Travel Services sub-sector, received support, while industries such as liquor outlets did not.

“The liquor sector did not get any relief from government... Tourism has received some sort of relief.”

(Industry Experts Interview, 2022)

Further to the above, stakeholders who indicated that they received support were requested to indicate the support that they received from either the government or the private sector. The figure below illustrates these results.

Figure 5-24: Support Provided by Government or Private Sector

Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As can be seen in the figure above, 72% of respondents indicated that they received financial support during the pandemic. Stakeholders from sub-sectors including the Tourism and Travel Services sub-sector indicated that they received financial support from the government through the Temporary Employer/Employee Relief Scheme (“TERS”) facilitated by the Unemployment Insurance Fund (“UIF”). It was further added that through the support provided under TERS, businesses were able to settle salary payments for their employees during the pandemic.

“The support we received was TERS from the UIF. All of the employees who remained had to take salary cuts, and the TERS payment assisted the company as it supplemented the salaries.”

(Employers Interview, 2022)

Some stakeholders from sub-sectors such as the Hospitality, Tourism and Travel Services, and the Arts, Culture and Heritage sub-sectors, indicated that they received support from the private sector in the form of a loan from the bank.

“...we also got a loan from a local bank in [sic] the private sector.”

(Employers Interview, 2022)

30% of stakeholders indicated that their businesses received ‘Other’ support from the government. When requested to provide further detail, a respondent indicated that they received support through a business interruption insurance claim.

“[We received support through a] Business interruption [sic] insurance claim.”

(Employers Survey, 2022)

Furthermore, a representative from the Gaming and Lotteries sub-sector indicated that a provision was introduced to assist liquor traders who were experiencing financial

challenges. This provision provided liquor traders with the flexibility of not having to renew expired liquor licenses during the lockdown period.

“[Instead of suspending] liquor licenses that expired between 2019-2021, [licence holders] were given benefit of a doubt, [with the government] having put in place a provision that allows for leeway of companies to not renew licenses for the affected timeline during COVID-19, but with a penalty [imposed] that does not exceed the total amount that you need to pay.”

(Industry Expert Interview, 2022)

In addition to the consequences noted above, respondents were requested to indicate any unintended consequences that their businesses experienced as a result of the support they received during the COVID-19 pandemic. This was to determine any benefits or negative implications that may have not been anticipated by the recipients of the relief support. It was noted that not many unintended benefits were realised however, some respondents noted certain negative implications that were realised. One stakeholder mentioned that they were offered contracts for training during the COVID-19 pandemic, yet when the contracts ended they were still required to make payments to learners.

“We had to pay youth even though we were out of contract. I [cannot] think of any other unintended consequences because that was the major headache. The issue is that we did work out of contract and that was work we could not avoid’

(Employers Focus Group, 2022)

Other respondents mentioned that their organisation only received TERS payments in the early months of 2020 and did not receive any payments further.

“We did apply for TERS and received a payment in the early months of 2020. I do not think it continued into 2021, they stopped it”

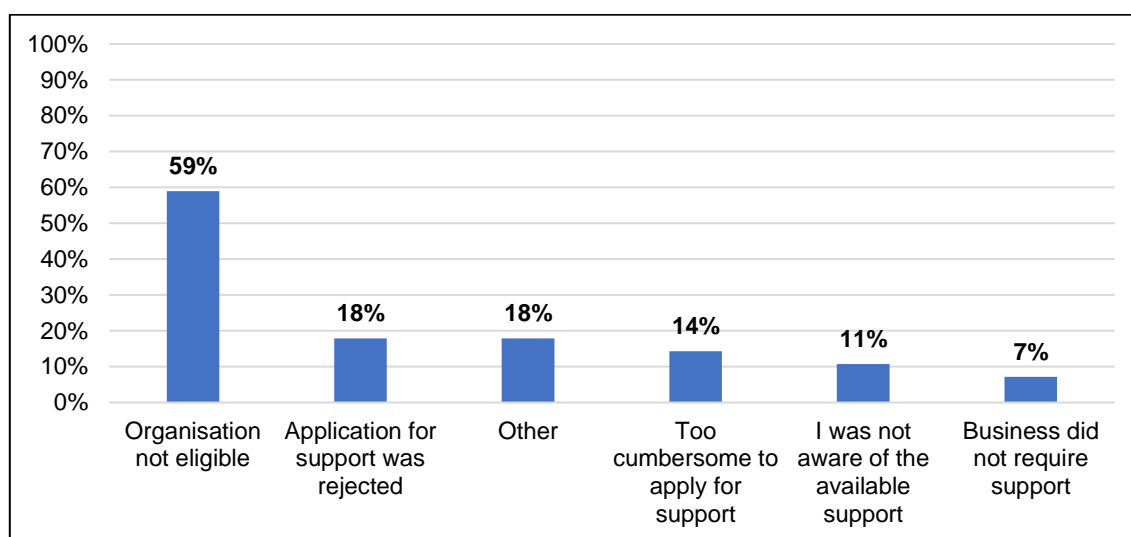
(Employers Focus Group, 2022)

Conversely, 43% of respondents indicated that they did not receive any support from government or the private sector during the pandemic. Some stakeholders from the performing arts and live music industry indicated that they were only provided with grants they were already being allocated prior to the pandemic.

“No, [we received] just our normal grants.”

(Businesses Owners Interview, 2022)

In an attempt to understand why these respondents did not receive support from the government and/or private sector during the pandemic, respondents were asked to indicate the rationale behind them not being granted support. The figure below provides a breakdown of their responses.

Figure 5-25: Perceived Rationale Behind Businesses not Receiving Support

Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As can be seen above, 59% of respondents indicated that they did not receive any support as their businesses were not eligible to benefit from the existing support programmes. Stakeholders from the Hospitality and Tourism and Travel Services sub-sectors indicated that they were not eligible as their sector was not part of the prioritised areas eligible to receive support.

“We are in the Hospitality and Tourism sub-sectors and are a training institution. Our applications were unsuccessful, and I think one of the reasons was that the prioritised areas were out of the sector. When I enquired, they said they used industry needs to get a priority list of what should be funded.”

(Employers Focus Group, 2022)

Additionally, 18% of stakeholders indicated that their applications for support were rejected. In order to be able to pay salaries to their employees, businesses in sub-sectors such as the Gaming and Lotteries indicated that they had applied for TERS, however, their application was unsuccessful.

“I had to apply for TERS. I emailed them. In the meantime, I had to pay my staff with whatever I had in my bank account and credit card with the expectation that TERS would come through for me. But I did not get it.”

(Employers Interview, 2022)

Furthermore, 11% of stakeholders indicated that they were not aware of any available support. Some stakeholders from the Hospitality sub-sector were of the view that they were not aware of the available support specific to their field and could not apply for the ones that were aware of given that they believed they were not suitable for their field.

“I would say there was no support specific to our field that we knew of. The support that was available, we knew how to apply for it, but we did not feel there were any specific to our field.”

(Employers Interview, 2022)

Stakeholders from the Arts, Culture and Heritage sub-sectors indicated that they never received any feedback regarding their previous discretionary grant (“DG”) applications or any communication with regard to further support offered for recently accredited skills development providers.

“No one communicated with regard to [the] outcomes of [our] previous DG application or any support for recently accredited skills development providers.”

(Training Provider Interview, 2022)

18% of respondents cited ‘Other’ as the reason for them not receiving any support. Some stakeholders from the Conservation sub-sector indicated that they were not aware of how the allocation process was facilitated and, thus, were not aware of the factors that led them to not receiving any support.

“The problem is, we do not know how labour was doing this because we did the application procedure online. We have not been assisted even now. There has not been any communication since.”

(Employers Interview, 2022)

Key Findings

- It was found that financial relief was provided to some businesses through the UIF, TERS, and bank loans.
- Other support provided included the relaxation of regulations, such as those regarding the renewal of licences for liquor traders.
- Businesses that did not receive support during the pandemic cited reasons such as their business not qualifying for support, their applications being unsuccessful and a lack of knowledge regarding the support available.

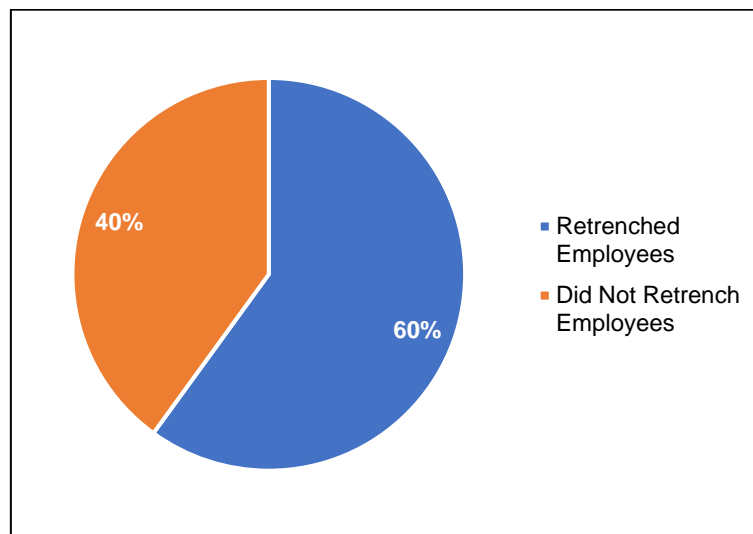
5.3 Impact of COVID-19 on Employment

This section provides an overview of the impact of COVID-19 on employment within the CATHSSETA sub-sectors as well as the impact on learners’ ability to find employment during the pandemic.

5.3.1 Impact of COVID-19 on Retrenchments

The following section explores the impact of COVID-19 on labour market trends across CATHSSETA sub-sectors, by assessing the proportion of businesses that retrenched employees during the pandemic and those that plan on conducting retrenchments in the short to medium term as a result of the COVID-19 pandemic. As such, the figure below illustrates the proportion of businesses that retrenched employees as a result of the pandemic.

Figure 5-26: Proportion of Businesses that Retrenched Employees as a Result of COVID-19



As seen in the figure above, 40% of the respondents indicated that their business did not retrench employees as a result of COVID-19. This included businesses from the Gaming and Lotteries sub-sector.

“Not one! And at that moment I had more, I never lost one. The one guy who turned 65 retired. But I ever lost anyone.”

(Employers Interview, 2022)

Contrastingly, 60% of respondents indicated that their businesses retrenched employees as a result of the pandemic. Stakeholders, such as those from the Hospitality sub-sector, indicated that jobs that required physical interactions, such as housekeeping were not required during the pandemic and were therefore the ones most affected by the retrenchments.

“...but what I can say is that because of COVID-19, we are not able to interact face-to-face, so most of the retrenchments are related to face-to-face jobs.”

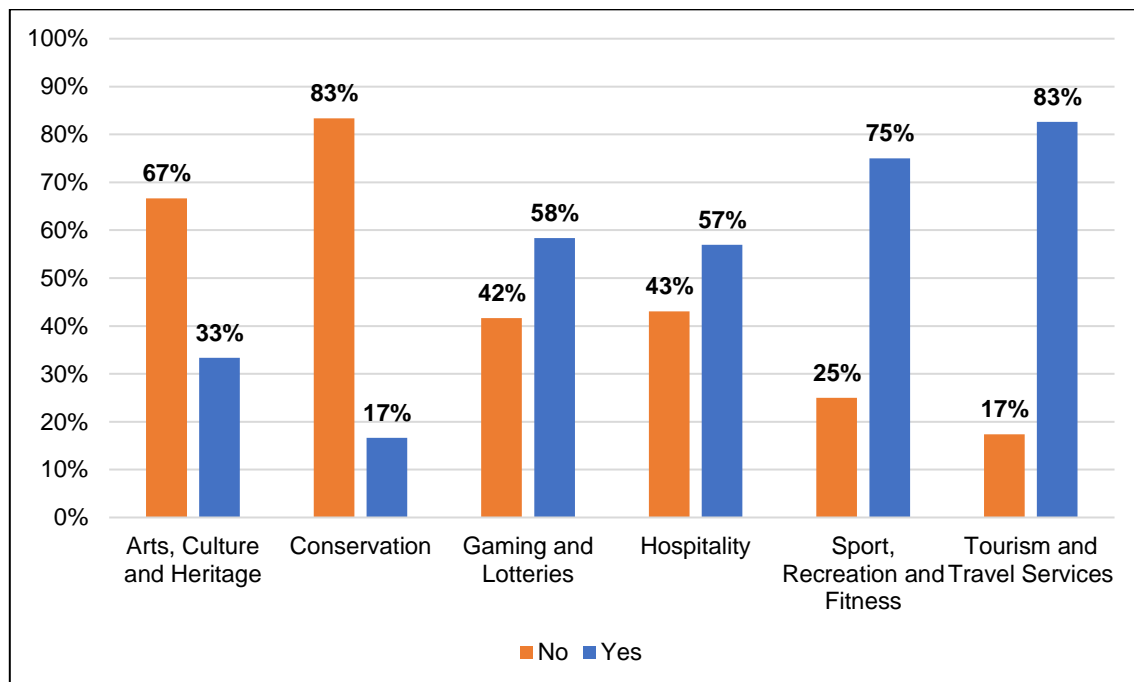
(SDFs Interview, 2022)

“We had to retrench members of housekeeping to survive.”

(Employers Interview, 2022)

In order to gain an in-depth understanding of the impact of COVID-19 on employment within CATHSSETA sub-sectors, the results were analysed at sub-sector level. The figure below depicts the results of the in-depth analysis conducted.

Figure 5-27: Sub-sector Analysis of Businesses that Retrenched Employees as a Result of the COVID-19 Pandemic



As illustrated in the figure above, the majority of respondents in the Sport, Recreation and Fitness (75%) and in the Tourism and Travel Services sub-sectors (83%) indicated that their businesses had retrenched employees as a result of the COVID-19 pandemic. This was supported by a respondent from the Tourism and Travel Services sub-sector who noted that their business had to adopt measures such as reducing wages and retrenching staff in order to ensure the survival of the business during the COVID-19 pandemic.

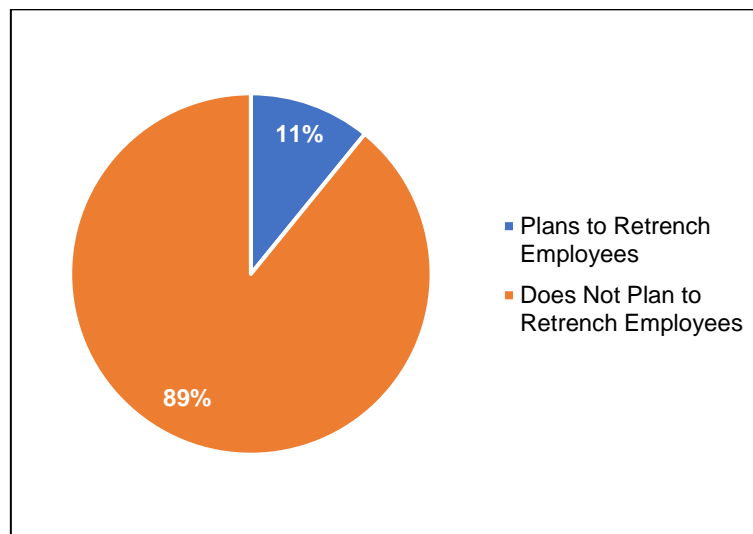
“The tourism sector got a hard knock, our company mainly takes clients from the UK and unfortunately when the borders were closed, we had little income. We had to cut wages and retrench staff to survive.”

(Employers Interview, 2022)

Furthermore, it was found that the majority of respondents from the Conservation (83%) and Arts, Culture and Heritage (67%) sub-sectors noted that their businesses did not retrench employees as a result of the COVID-19 pandemic.

Survey respondents were further requested to indicate whether their businesses planned to retrench any employees in the short to medium term. The results are illustrated in the figure below.

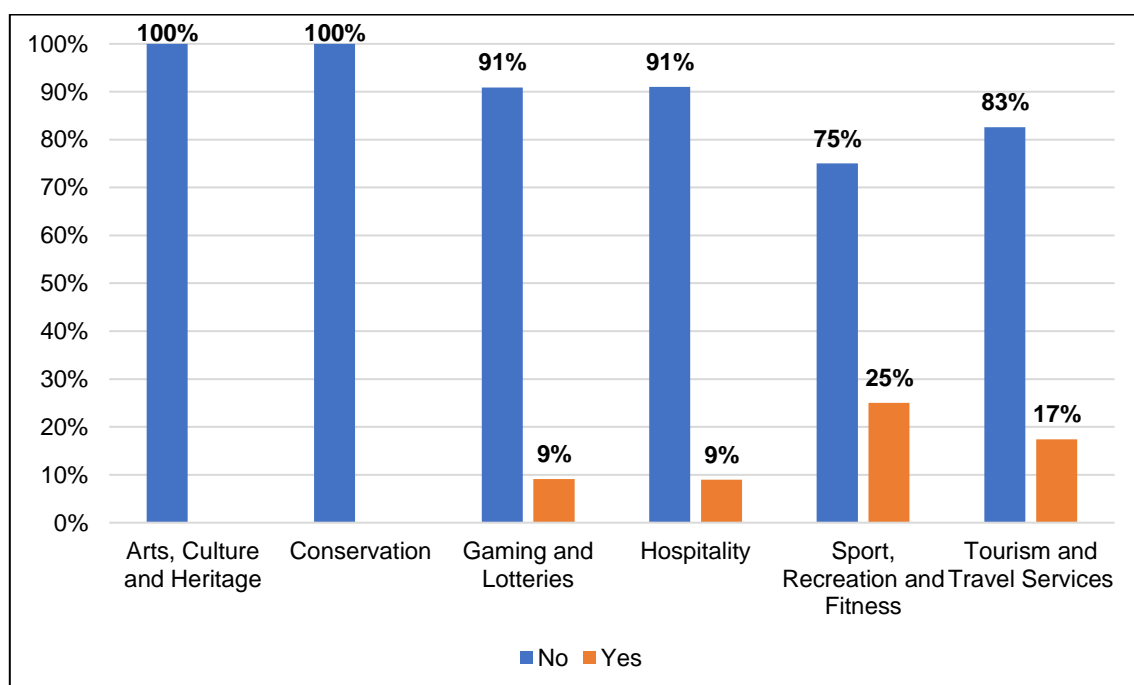
Figure 5-28: Proportion of Businesses that Plan to Retrench Employees in the Short to Medium Term



As can be seen in the figure above, the majority of respondents (89%) indicated that their businesses did not plan to retrench additional employees in the short to medium term. Only 11% of respondents indicated that they planned to retrench employees in the short to medium term.

The above results were analysed at a sub-sector level, the results of which are illustrated in the figure below.

Figure 5-29: Sub-sector Analysis of Businesses that Plan on Retrenching Employees in the Short to Medium Term



As illustrated in the figure above, the majority of respondents across all sub-sectors indicated that they did not plan on retrenching employees in the short to medium term. A stakeholder from the Arts, Culture and Heritage sub-sector indicated that their

business was not experiencing financial challenges at the time of the study and therefore did not intend to retrench employees in the next 6 to 18 months.

“No, not at the moment. We are still head above water, and we hope it remains that way.”

(Industry Experts Interview, 2022)

Furthermore, a stakeholder that represented the Tourism and Travel Services sub-sector indicated that their business would not be retrenching employees in the future due to their new operating model which focuses on appointing employees on a contractual basis.

“We are not planning on making any more retrenchments. We are not looking for permanent work anymore. We will implement contract work going forward.”

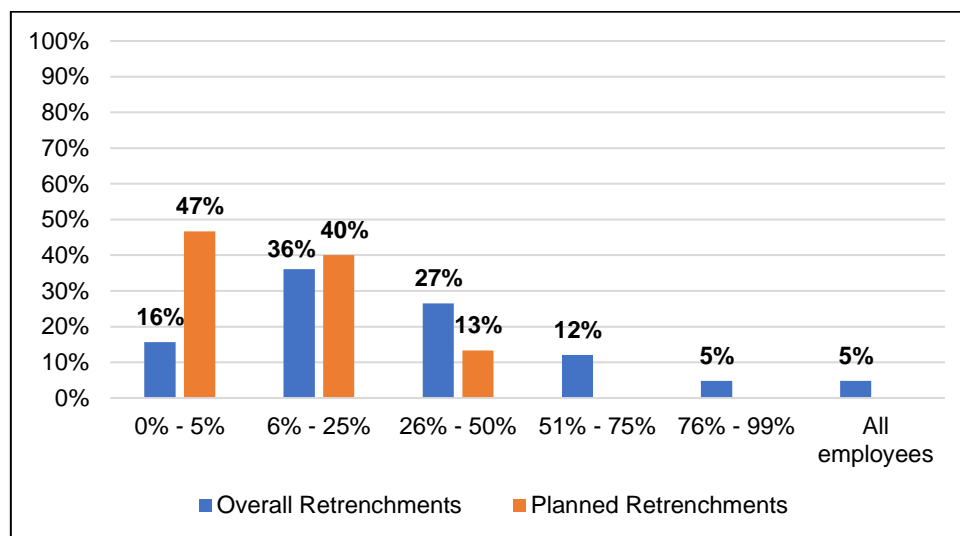
(Employers Interview, 2022)

Furthermore, it can be seen that only 9% of respondents representing the Gaming and Lotteries and Hospitality sub-sectors stated that they intend to retrench employees in the short to medium term. The low level of planned retrenchments may be attributed to respondents indicating that they were optimistic about their growth prospects and were thus not planning to retrench any employees.

“No, we are at an optimal operational level and in a cautiously optimistic growth space, so definitely no. There are no further plans to retrench anyone.”

(Employers Interview, 2022)

The respondents who indicated that their businesses had retrenched employees due to the pandemic, were further requested to indicate the percentage of employees that had been retrenched. Similarly, those who indicated that their business intended to retrench employees in the short to medium term, were requested to indicate the percentage of employees they planned to retrench. The figure below provides a comparison of the results.

Figure 5-30: Comparison of Current and Planned Retrenchments as a Result of COVID-19

Note: Percentages in the above graph may not add up to 100% due to rounding off

It can be seen that the majority of respondents (79%) indicated that their business retrenched less than 50% of their employees as a result of the pandemic, whilst 22% of respondents indicated that their business retrenched more than 51% of their employees. Respondents from the Gaming and Lotteries and Tourism and Travel Services sub-sectors were among those respondents who indicated that their businesses retrenched 50% of their employees.

“We retrenched 50% of our employees.”

(Employers Interview, 2022)

Stakeholders from the Tourism and Travel Services sub-sectors indicated that the retrenchments were necessitated by a loss of revenue during the pandemic.

“It was terrible, we had to retrench half the team. It was shocking. We lost all sort of revenue for a while.”

(Employers Interview, 2022)

36% of respondents indicated that they had retrenched between 6% and 25% of their employees, with 40% of respondents indicating that they planned to retrench the same percentage in the short to medium term. Among the businesses that retrenched up to 25% of their employees was a business owner in the Hospitality sub-sector who indicated that they underwent restructuring of the organisation which led to them retrenching 24% of their personnel.

“We went into an operational restructure in July 2020. Which was initially initiated in May 2020. We reduced our staff count by 24%.”

(Employers Interview, 2022)

Despite 11% of respondents indicating that they planned to make further retrenchments, it was found that none of the businesses surveyed intended on retrenching more than 50% of their employees in the short to medium term.

Positive Practices

- Some stakeholders, such as those from the Hospitality sub-sector were of the view that no additional retrenchments would be required in the short to medium term as they are optimistic about performance and are not currently experiencing financial challenges.
- It was found that none of the businesses that were surveyed planned to retrench more than 50% of their employees in the short to medium term. This is an improvement from the 22% of businesses that retrenched more than half of staff during the pandemic.

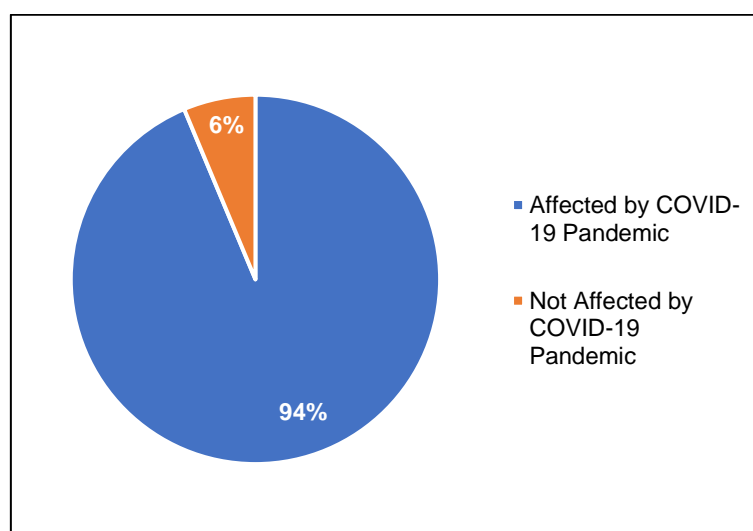
Key Findings

- It was noted that 60% of businesses retrenched employees as a result of the COVID-19 pandemic. Reasons for retrenchments included a decrease in the business' revenue and customers, as well as decreased demand for certain face-to-face roles, such as housekeeping in the Hospitality sub-sector.
- It was found that some businesses were not planning further retrenchments due to a shift in their operating model whereby employees would be appointed on a contractual basis rather than a permanent basis.

5.3.2 Impact of COVID-19 on Ability to Find Employment

As depicted in section 5.1.4, 77% of surveyed learners indicated that they were unemployed at the time of the survey. These learners were requested to indicate whether or not the COVID-19 pandemic affected their ability to find employment. The results are presented in the figure below.

Figure 5-31: Proportion of Learners whose Ability to Find Employment was Affected by the Pandemic



As can be seen in the figure above, the majority of respondents (94%) indicated that their ability to find employment had been affected by the pandemic. Only 6% of respondents indicated that their ability to find employment had not been affected by the pandemic.

Some learners indicated that the difficulty in finding employment increased during the pandemic due to the ceasing of operations in the Hospitality sub-sector.

“As the hospitality industry got quiet during the pandemic getting a job became more difficult.”

(Learners Focus Group, 2022)

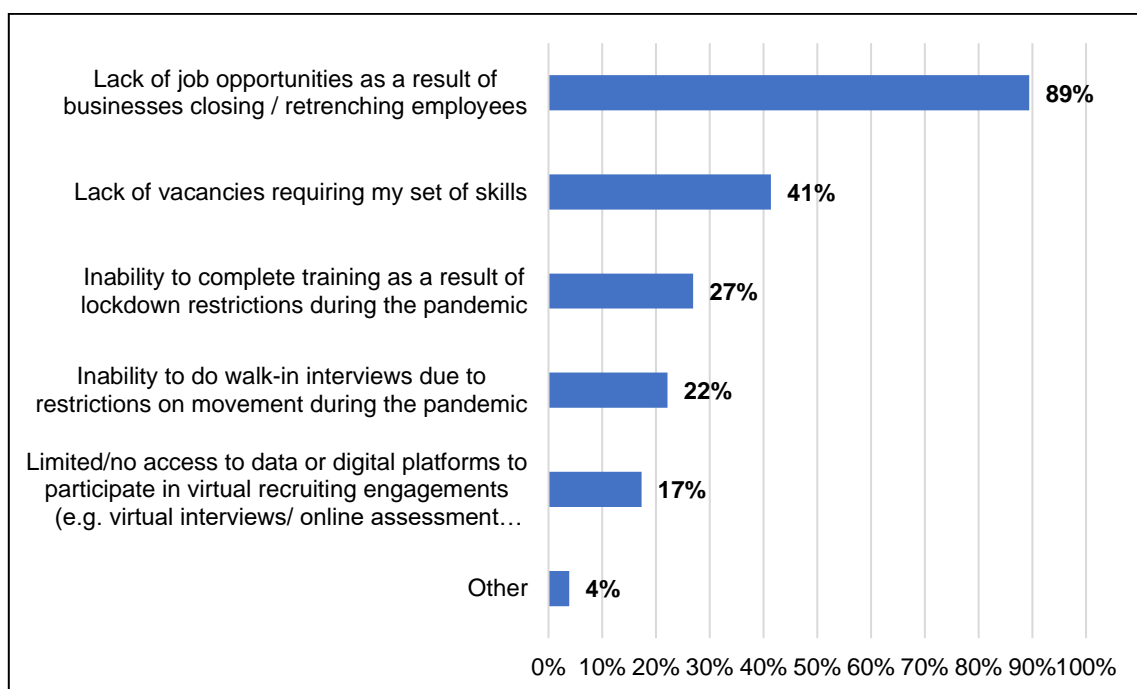
Learners also indicated that operations within the Sports, Recreation and Fitness sub-sector had not resumed to full capacity which made it difficult for them to find employment.

“It is difficult to get a job at the moment because the sports sub-sector has not fully reopened.”

(Learners Focus Group, 2022)

Respondents were further requested to indicate the ways in which the pandemic had affected their ability to find employment. The figure below illustrates the results.

Figure 5-32: Ways in which COVID-19 Affected Learners' Ability to Find Employment



Note: Percentages in the above graph may not add up to 100% because respondents were allowed to select more than 1 option

As seen in the figure above, the majority of respondents (89%) indicated that they were not able to find employment due to a lack of job opportunities as a result of businesses closing or retrenching employees.

“I was searching for a job for months and months and I realised I could not find any.”

(Learners Focus Group, 2022)

This is supported by the finding in section 5.3.1, whereby it was found that 60% of the surveyed businesses had retrenched employees during the pandemic.

In addition, learners were of the view that companies were not willing to expand their staff count due to financial constraints.

“Companies [were] not willing to take in more staff, due to financial constraints.”
(*Learners Survey, 2022*)

41% of respondents indicated that there was a lack of vacancies requiring their sets of skills, with consulted learners noting that there appeared to be fewer job opportunities available during the pandemic.

“Less posts were available during the pandemic.”
(*Learners Focus Group, 2022*)

A further 27% of learners indicated that their ability to find employment was affected by an inability to complete training as a result of lockdown restrictions. A stakeholder from the Hospitality sub-sector reported that several learners were unable to complete training as a result of the challenges faced by the business in implementing COVID-19 health and safety protocols, and a lack of available training providers. It was added that despite having signed employment contracts, learners could not complete their employee onboarding process as they were unable to complete their training.

“We had 80 learners in the Eastern Cape, and that had to stop in the midst of the [training] programme in order to assess the impact of COVID-19. Our challenge was that the health protocols were very slow. Learners had signed employment contracts but had not been absorbed into labour. We had 80 employed people who needed training, but no one could take responsibility for the training.”
(*Employers Focus Group, 2022*)

Only 4% of learners indicated that the pandemic affected their ability to find employment in ‘Other’ ways. When prompted, these respondents cited delays in obtaining their certificates from training institutions as a key reason.

“[I have not been able to find employment] due to delays [in obtaining] certificates.”
(*Learners Survey, 2022*)

This was further supported by a learner that was consulted in a focus group, who noted that they had not received their certificate following the completion of a learnership programme and this has made it difficult for them to find employment.

“I completed my learnership and I still have not received my certificate. This has made looking for a job more difficult.”
(*Learners Focus Group, 2022*)

Key Findings

It was noted that the ability of learners to find employment during the pandemic was affected by multiple factors including the freezing of recruitment processes from businesses' side, inability of learners to complete their practical training as a result of restrictions on movement, and delays in receiving certificates from CATHSSETA for completed courses.

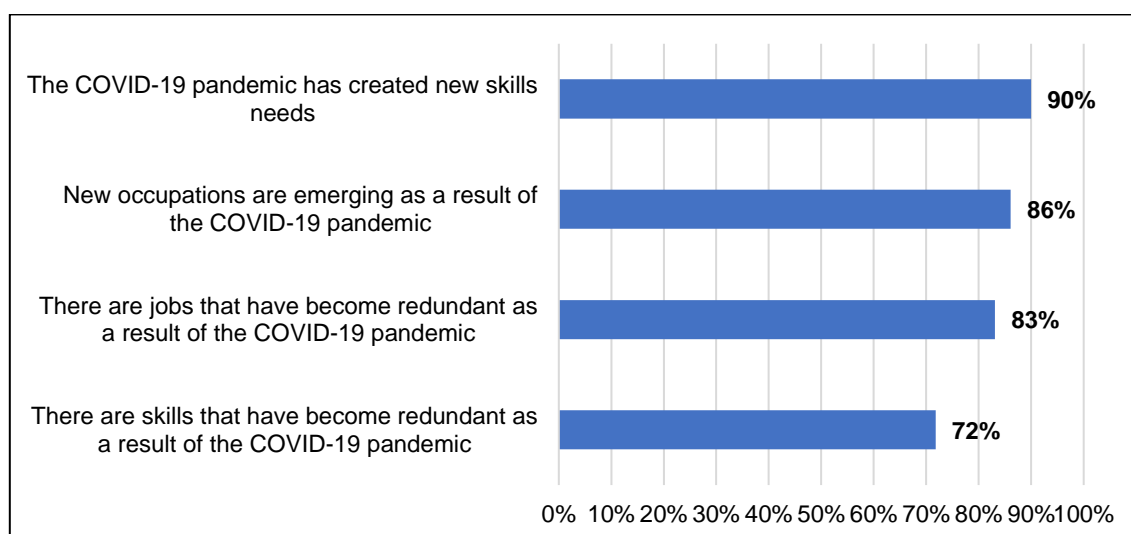
5.4 Impact of COVID-19 on Jobs and Skills

This section provides an overview of the impact of COVID-19 on the jobs and skills market and existing skills gaps, as well as the skills that are emerging within the CATHSSETA sub-sectors as a result of the pandemic.

5.4.1 Impact of COVID-19 on Jobs and Skills Market

In order to assess the impact of COVID-19 on the jobs and skills market, SDFs, learners and training providers were requested to indicate the extent to which they agreed that new occupations and skills had emerged as a result of the pandemic. Additionally, the respondents were requested to indicate the extent to which they agreed that there were jobs and skills that had become redundant. The figure below demonstrates these results.

Figure 5-33: Extent to which Respondents Agree that Jobs/Skills have Emerged/Become Redundant



As can be seen in the figure above, the majority of respondents (86%) agreed that new occupations were emerging as a result of the pandemic, while 90% agreed that the pandemic had created new skills. An industry expert representing the Tourism and Travel Services sub-sector, was of the view that jobs that would enable companies to assess the impact of future risks on their businesses were emerging, such as risk management.

“From a senior point of view, I would say risk management, jobs like that, that need you to consider what can potentially happen to a business in the future in case something like COVID-19 happens, strategic planning [and] decision making.”

(Industry Experts Interview, 2022)

Other stakeholders were of the view that digital skills required for the transition from traditional learning to online were emerging.

“Skills needed to change our training provision to online digital skills.”

(SDFs Interview, 2022)

The majority of stakeholders were also of the view that there were skills (72%) and jobs (83%) that had become redundant as a result of the pandemic. A stakeholder from the Tourism and Travel Services sub-sector was of the view that the automation of tasks and adoption of online processes were responsible for the redundancy of certain jobs and skills within their organisation.

“In our business specifically, some jobs have become redundant because we have been able to automate some processes. But that has been fairly limited and that is only from an administrative and financial point of view.

(Employers Interview, 2022)

Similarly, a respondent from the Hospitality sub-sector added that the adoption of digital technology has rendered some jobs or skills redundant.

“In a way yes [there are jobs or skills that have become redundant], especially as we are leaning into the 4IR, the traditional way of doing things has changed. For example, COVID-19 has pushed us to go digital, and many things need to be upgraded. I would say skills would need to be developed.”

(SDFs Interview, 2022)

Other stakeholders were of the view that, rather than jobs becoming redundant, the number of people required to conduct specific tasks was diminishing as a result of operational difficulties.

“Yes, it might not be that the specific job is redundant, but the number of people needed decreases as a result of operational difficulties brought about by COVID-19.”

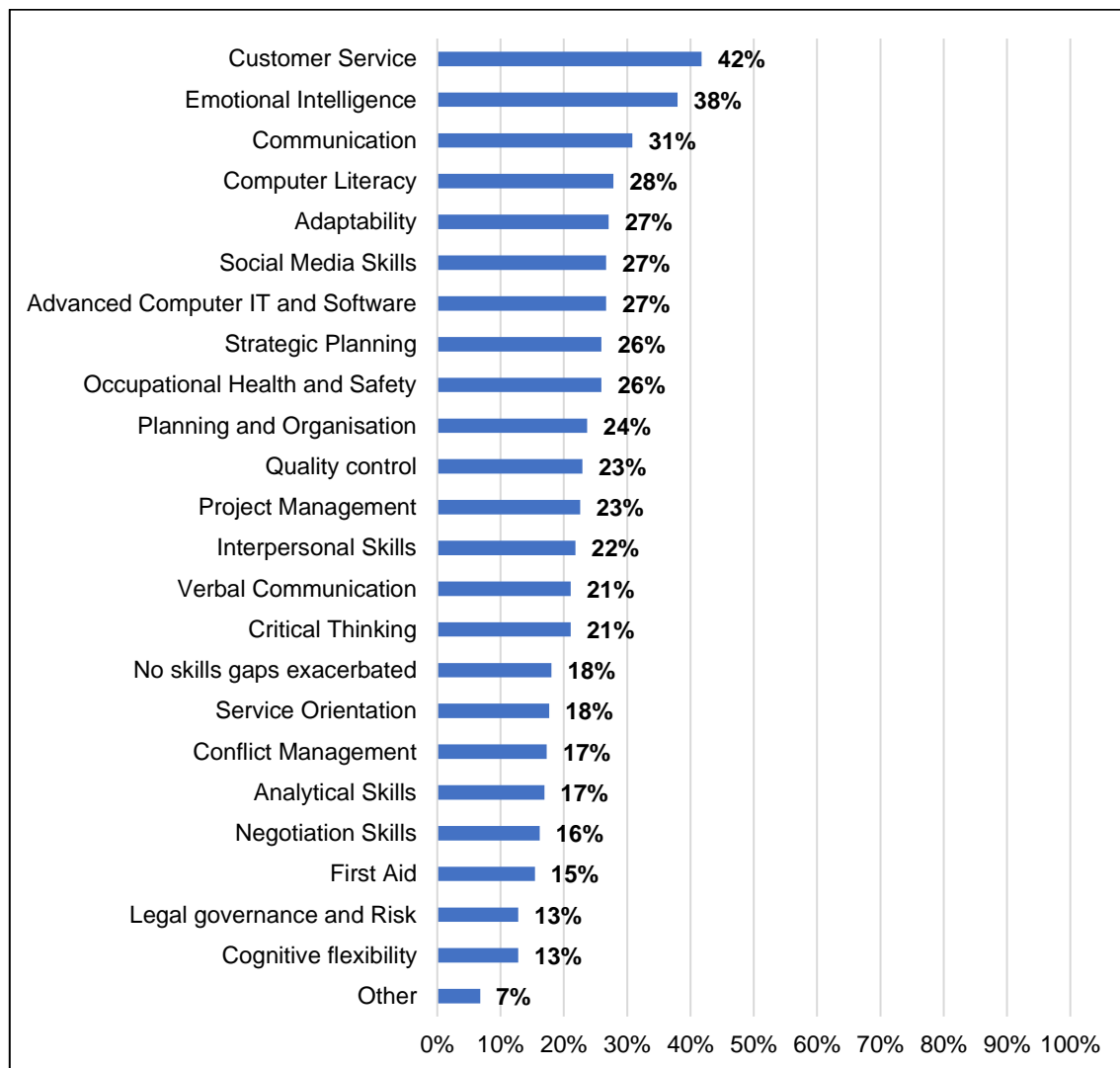
(SDFs Interview, 2022)

Key Findings

- Stakeholders in the Hospitality and Tourism and Travel sub-sectors noted that the shift to online learning during the pandemic, coupled with the Fourth Industrial Revolution, has resulted in an increased demand for digital skills. However, stakeholders noted that the adoption of these digital technologies and the automation of business activities has resulted in other jobs and skills becoming redundant.
- Some stakeholders from the Tourism and Travel Services sub-sector, were of the view that COVID-19 has resulted in the emergence of jobs and skills that would enable companies to assess the impact of future risks on their businesses, such as risk management, strategic planning and decision making.

5.4.2 Impact of COVID-19 on Existing Skills Gaps

In order to determine the impact of COVID-19 on existing skills gaps within the CATHSSETA sub-sectors, respondents were requested to indicate the existing gaps which they believed had been exacerbated. The results are illustrated in the figure below.

Figure 5-34: Skills Gaps Exacerbated by COVID-19

Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As can be seen in the figure above, 42% of stakeholders were of the view that skills gaps have been exacerbated in customer service, 38% believed the gaps to have been exacerbated in emotional intelligence, while 31% believe the gaps to have been exacerbated in communication skills. The least number of stakeholders believed that skills gaps had been exacerbated in first aid (15%), legal governance and risk and cognitive flexibility (13% each). It is worth noting that 18% of stakeholders were of the view that no skills gaps were exacerbated, while 7% indicated 'Other' skills gaps have been exacerbated. When prompted to expand on their responses, respondents indicated 'Other' skills gaps such as counselling and trauma debriefing as well as skills gaps with chefs.

"[Skills gaps in] counselling and trauma debriefing [have been exacerbated]."
(SDFs Survey, 2022)

“Skills gaps with chefs [have been exacerbated].”
(SDFs Survey, 2022)

The results above were analysed at a sub-sector level in order to explore the perception of respondents regarding the skills gaps that have been exacerbated per CATHSSETA sub-sector. The results are provided in the table below.

Table 5-2: Exacerbated Skills per CATHSSETA sub-sector

Skills	Arts, Culture and Heritage	Conservation	Gaming and Lotteries	Hospitality	Sport, Recreation and Fitness	Tourism and Travel Services
No skills gaps exacerbated	2%	3%	7%	4%	2%	3%
Analytical Skills	4%	3%	1%	4%	2%	3%
Cognitive flexibility	2%	0%	3%	3%	2%	3%
Advanced Computer IT and Software	4%	9%	9%	5%	5%	4%
Computer Literacy	6%	9%	2%	5%	6%	4%
Customer Service	7%	3%	10%	8%	9%	8%
Negotiation Skills	3%	3%	1%	3%	3%	4%
Quality control	4%	6%	2%	4%	5%	4%
Project Management	6%	9%	4%	3%	5%	4%
Occupational Health and Safety	4%	6%	7%	5%	5%	5%
Adaptability	5%	9%	8%	4%	5%	6%
Legal governance and Risk	1%	0%	4%	2%	3%	3%
Communication	7%	12%	8%	5%	5%	6%
Conflict Management	4%	3%	1%	3%	4%	3%
Critical Thinking	5%	3%	3%	3%	4%	5%
Strategic Planning	5%	6%	4%	5%	5%	5%
Social Media Skills	7%	3%	3%	6%	5%	3%
Service Orientation	4%	0%	2%	3%	3%	3%
First Aid	3%	3%	0%	3%	3%	3%
Planning and Organisation	4%	3%	5%	5%	6%	4%
Interpersonal Skills	3%	3%	3%	5%	6%	3%
Verbal Communication	2%	0%	4%	5%	2%	4%

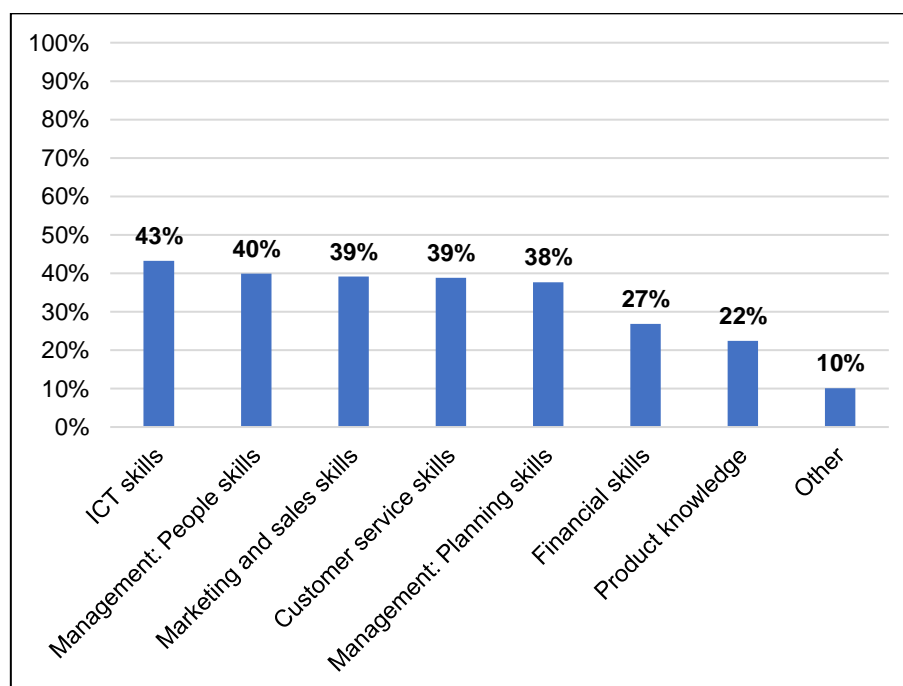
Skills	Arts, Culture and Heritage	Conservation	Gaming and Lotteries	Hospitality	Sport, Recreation and Fitness	Tourism and Travel Services
Emotional Intelligence	5%	6%	8%	8%	6%	7%
Other	4%	0%	0%	1%	0%	2%

As can be seen in the table above, the skills gaps most exacerbated across the various sectors included communication skills in the Conservation sub-sector (12%), customer service skills in the Gaming and Lotteries (10%), Sport, Fitness and Recreation (9%) and Tourism and Travel Services sub-sectors (8%), customer service and emotional intelligence skills in the Hospitality sub-sectors (8%) and communication and customer service skills in the Arts, Culture and Heritage sub-sector (8%).

5.4.3 Emerging Skills and Change Drivers

It was noted in Section 5.4.1 that 90% of respondents believed that new skills needs have emerged as a result of the pandemic. Respondents were requested to indicate what skills they believed would be required by their businesses as a result of the COVID-19 pandemic. This also allowed for the determination of the change drivers that may be influencing occupational patterns across the CATHSSETA sub-sectors. The figure below provides a breakdown of these results.

Figure 5-35: Skills Emerging as a result of COVID-19



Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option.

As can be seen in the figure above, the emerging skills that were identified by respondents included ICT skills (43%), people skills (40%), marketing and sales skills (39%), customer service skills (39%) and planning skills (38%).

The results above were further analysed at a sub-sector level in order to explore respondents' perception regarding the skills gaps that are emerging in each of the CATHSSETA sub-sectors. The results are provided in the table below.

Table 5-3: Emerging Skills per CATHSSETA sub-sector

Sub-sector	Arts, Culture and Heritage	Conser- vation	Gaming and Lotteries	Hospitality	Sport, Recreation and Fitness	Tourism and Travel Services
Financial skills	16%	7%	9%	9%	9%	10%
Customer service skills	11%	7%	11%	15%	16%	16%
Marketing and sales skills	17%	0%	11%	13%	16%	16%
ICT skills	21%	33%	21%	13%	18%	15%
Management: Planning skills	12%	27%	11%	15%	16%	12%
Product knowledge	9%	0%	4%	8%	9%	10%
Management: People skills	9%	7%	17%	16%	14%	10%
Other	3%	0%	2%	3%	0%	5%

The table above provides a breakdown of the skills that are deemed as emerging by respondents across different sub-sectors. It can be seen that the skills identified as emerging by the highest proportion of respondents within the Arts, Culture and Heritage (21%), Conservation (33%), Gaming and Lotteries (21%) and Sport Recreation and Fitness (18%) were ICT skills. The need for ICT skills and advanced technological knowledge within businesses in the CATHSSETA sub-sectors has been identified as a change driver that influences skills development within the sector. This is support by CATHSSETA (2021) which expounds that the COVID-19 pandemic has resulted in an increased dependence on technology to ensure the survival of businesses and skills related to ICT such as social networking, e-commerce, and digital marketing, as these have played an important role in minimising the impact of COVID-19 in businesses.

This sentiment was further echoed in interviews and focus groups, with a stakeholder from the Arts, Culture and Heritage sub-sector indicating that ICT skills, along with other skills such as skills related to intellectual property, design, marketing, and advertising emerged during the pandemic.

“I think [that there are new skills emerging as a result of COVID-19]. Particularly [in] ICT, intellectual property, design, marketing, and advertising.”

(Industry Experts Interview, 2022)

In addition to the above, ICT skills were identified as emerging in the Literature Review with research noting that the shift to remote working and learning had necessitated this. ICT, which also includes access to high-speed broadband internet, was found to

be a major facilitator of working and learning initiatives during the pandemic as people were forced to undertake these activities from their homes (Ahmed, 2020).

The highest number of respondents in the Hospitality sub-sector identified people skills (16%) as emerging, while those in the Tourism and Travel Services identified customer service and marketing and sales skills (16% each). A training provider from the Tourism and Travel sub-sector indicated that there was a demand for social media training in order to enhance businesses' reputation in the market.

"Then similarly, with the lodges and traditional places that relied on their reputation; we started getting requests for social media training from them. We started to see how people are trying to change how they market their establishment, to the point that some lodges created budgets for social media."

(Training Providers Interview, 2022)

Furthermore, several respondents across the different sub-sectors identified 'Other' skills as emerging. When asked to expand on this, stakeholders indicated that skills in health and safety emerging.

"Health and safety [skills are emerging]."

(Employers Survey, 2022)

This was corroborated by stakeholders representing the Gaming and Lotteries sub-sector, who indicated skills such as disaster recovery, business rescue and COVID-19 compliance inspectors as emerging.

"Yes, I see [skills emerging in] Disaster Recovery, Business Rescue, COVID Compliance Inspectors, and a lot of IT technicians."

(Industry Experts Interview, 2022)

It was noted that some respondents were of the view that no new skills had emerged within their sub-sector as a result of the pandemic. Respondents from the Hospitality sub-sector indicated that they had not observed any new skills emerging within their industries.

"I would say there are not any. I have not noticed any within skill needs in our industry."

(SDFs Interview, 2022)

Key Findings

- It was noted that several skills were identified as emerging across the different sub-sectors. These included skills such as ICT skills, financial skills, marketing and sales skills, disaster recovery and business rescue skills. Additionally, stakeholders indicated that the need for jobs such as COVID-19 compliance inspectors was also emerging.
- A training provider from the Tourism and Travel Services sub-sector identified the need for social media training within several businesses in the sub-sector, that would enable the businesses to effectively market their products and services.

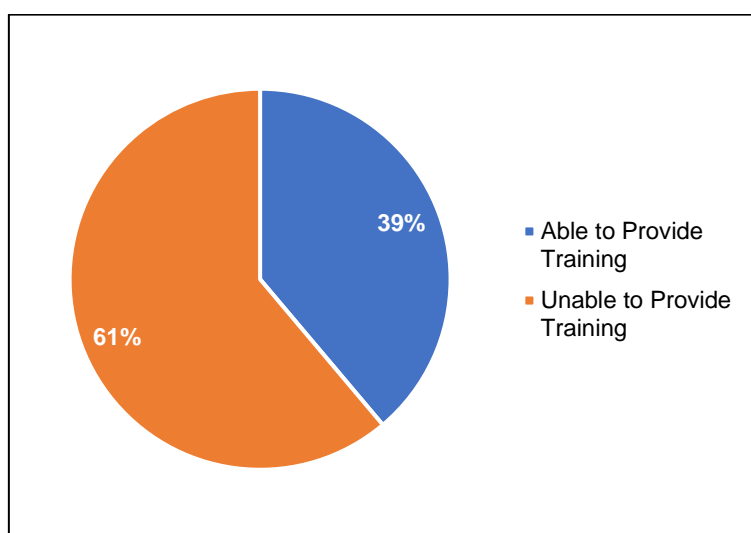
5.5 The Impact of COVID-19 on Training and Educational Initiatives

The following section explores the impact of COVID-19 on training and educational initiatives.

5.5.1 The Impact of COVID-19 on Ability to Provide Training

Stakeholders were requested to indicate whether they were able to provide training during the pandemic. The figure below illustrates the proportion of stakeholders that indicated that their organisation was able to provide training during the pandemic, against those who indicated that they were not able to.

Figure 5-36: Proportion of Stakeholders who were able to Provide Training during the Pandemic



It can be seen in the figure above that the majority of respondents (61%) indicated that their businesses were not able to provide training during the pandemic. Stakeholders were of the view that, while their business was operational during the pandemic, training was restricted by a lack of funding.

“With COVID, even though they were open, training did not happen like it was supposed to due to the lack of funds.”

(Employers Interview, 2022)

“But within the Hospitality [sub]-sector, our training was stopped because of the pandemic. The training budget was affected as well.”

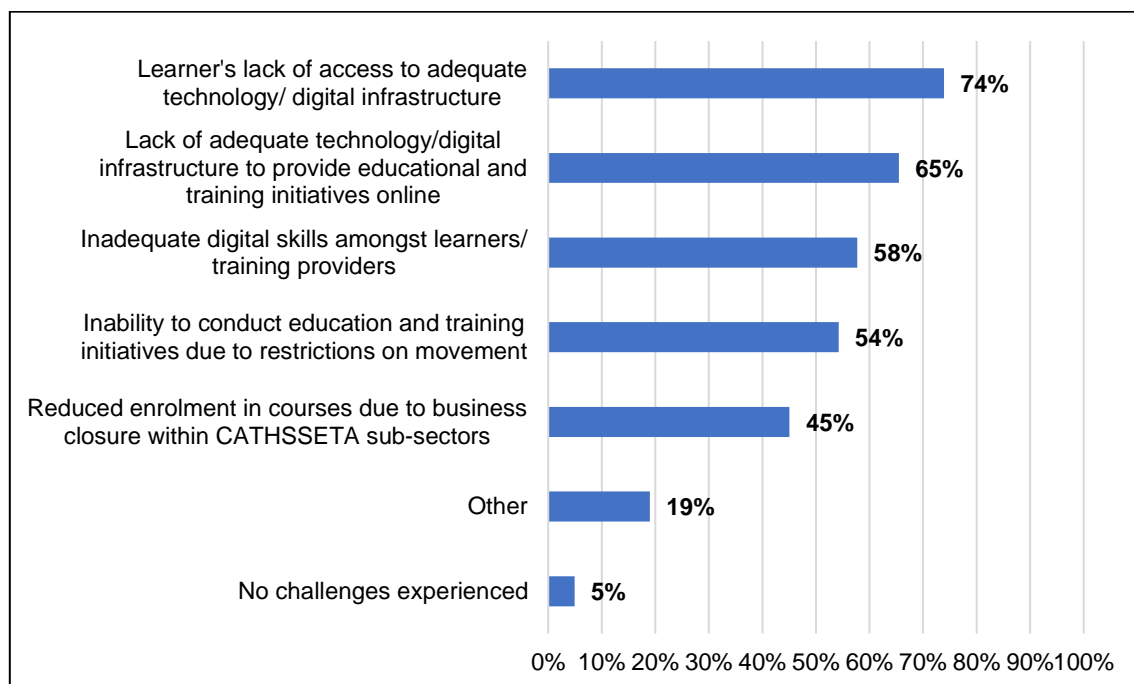
(Employers Interview, 2022)

Key Findings

It was found that the majority of businesses could not provide training to their employees during the pandemic, with stakeholders noting that this was mainly due to financial constraints.

To further unpack why stakeholders were unable to provide training, respondents were requested to indicate the challenges experienced by SDFs and training providers while attempting to provide education and training initiatives during the pandemic. The results are presented in the figure below.

Figure 5-37: Challenges Experienced when Attempting to Provide Education and Training During the Pandemic



Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As can be seen in the figure above, 74% of respondents indicated that learners experienced a lack of access to adequate technology/digital infrastructure which impeded stakeholders' ability to provide training during the pandemic. Some stakeholders were of the view that alternative arrangements had to be explored to ensure learners with no access to computers or smartphones were able to have access to training.

“Some of them do not have access to computers or smartphones so they could not access online training and we had to make separate arrangements for them.”

(SDFs Interview, 2022)

A stakeholder from the Tourism and Travel Services sub-sectors added that some of the arrangements that were made for students included the printing of learning material and setting up a WhatsApp group to provide support to them.

“We printed as much learning material as possible, so that everyone could leave with as many modules printed out. We also had WhatsApp support groups to help.”

(Training Providers Interview, 2022)

A further 65% of respondents indicated that they experienced a lack of adequate technology/digital infrastructure which hampered their ability to provide education and training initiatives online. Stakeholders indicated that they did not have adequate equipment, such as laptops, and due to their financial condition, they were not able to purchase the equipment required to enable them to conduct training. Consequently, they had to reduce the number of learners they provided training to.

“Yes, we are facing funding challenges, and we do not have laptops. We are using only one laptop. We do not have funding to buy more laptops. Those are the challenges to be able to keep up, and we had to reduce the number of children that we are used to.”

(SDFs Interview, 2022)

Additionally, 58% of respondents indicated inadequate digital skills amongst learners/training providers as a challenge. Some stakeholders were of the view that their learners had low levels of competency with regard to digital skills.

“Our learners have a low competency rate.”

(Training Providers Interview, 2022)

54% of respondents indicated that they were unable to conduct education and training initiatives due to restrictions on movement, with stakeholders noting that learners were not able to access workplaces to conduct their practical assignment.

“The only challenge was that learners were not able to enter the workplace to do their practical work.”

(SDFs Interview, 2022)

19% of respondents indicated that ‘Other’ challenges were experienced when attempting to provide education and training during the pandemic. Some learners indicated that high data costs were a major challenge experienced, resulting in learners having to spend significant amounts on the purchase of data.

“Yes. I sometimes could not afford data...”

(Learners Survey, 2022)

Positive Practice

Training providers noted that in order to accommodate learners who did not have access to technology/digital infrastructure, printed learning material was provided. In addition, support was made available to learners through communication platforms such as WhatsApp.

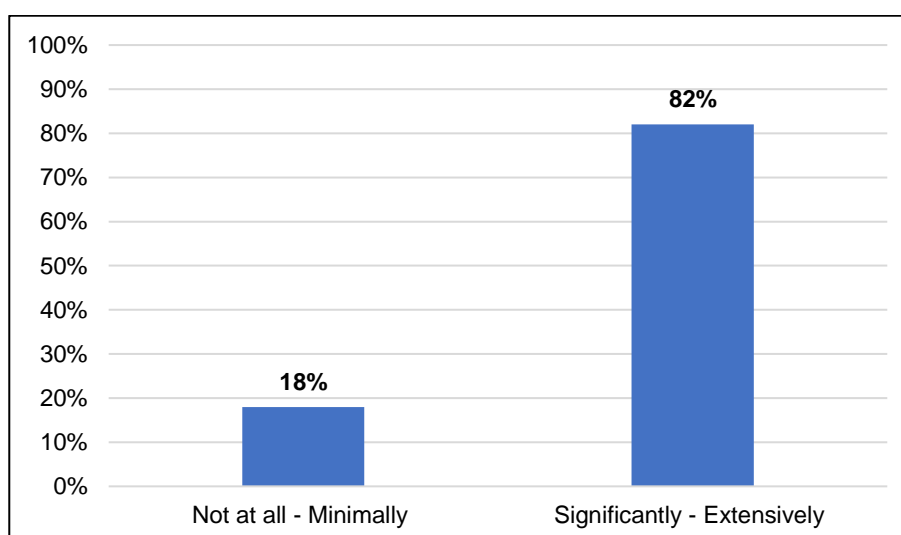
Key Finding

The key challenges experienced while providing education and training included learners' and training providers' lack of access to digital equipment, high data costs, learners' low levels of competency with regard to digital skills.

5.5.2 The Impact of COVID-19 on Businesses' Training Budget

Respondents were requested to indicate to what extent the pandemic had negatively affected their business' training budget. The results are illustrated in the figure below.

Figure 5-38: Extent to which the COVID-19 Pandemic Negatively Affected Businesses' Training Budget



As can be seen in the figure above, 82% of respondents indicated that their business' training budget was significantly to extensively affected by the COVID-19 pandemic. Respondents from sub-sectors such as the Tourism and Travel Services sub-sector stated that their business' training budget had decreased given that they had fewer employees during the pandemic.

"Training budgets have dropped. Firstly, we do not have as many employees as before. We had to let some people go in order to survive."

(Employers Focus Group, 2022)

In addition, stakeholders indicated that they had to re-allocate their training budget to ensure the survival of the business during the pandemic. For instance, owners indicated they had utilised their training budget to establish the IT infrastructure required for remote working.

“But even what we had as a training budget had to be redirected to pivot the business. Much of the funding went to infrastructure related to IT for example, in order to respond to the environment. But after that you would have no money left for training.”

(Employers Focus Group, 2022)

Additionally, 18% of respondents indicated that their business’ training budget was affected minimally, or not affected at all by the COVID-19 pandemic. It was noted that some businesses in the Gaming and Lotteries sub-sector had sufficient training budget during the COVID-19 pandemic, which may have been attributed to the stakeholders receiving funding for training from alternative sources.

“We had sufficient training budget. The Gambling Board does not rely on CATHSSETA for financial support related to training.”

(Employers Focus Group, 2022)

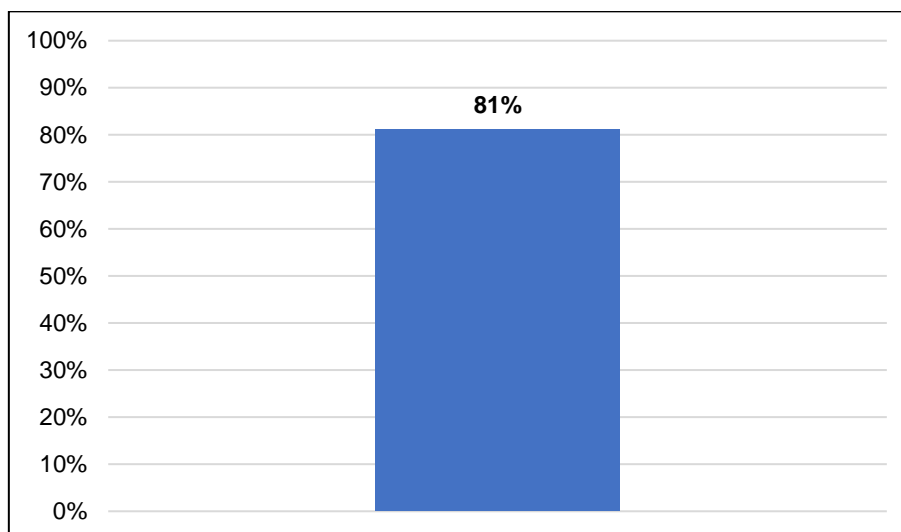
Key Findings

It was found that the majority of businesses’ training budgets were negatively affected by the COVID-19 pandemic. Some of the reasons cited by stakeholders included having fewer members employed during the pandemic and businesses re-allocating their training budget to other areas, such as the establishment of IT infrastructure, to ensure the survival of their business during the pandemic.

5.5.3 Training on New Emerging Skills

As highlighted in section 5.4.3, respondents believed new skills such as ICT skills, people skills, marketing and sales skills and planning skills have emerged as a result of the pandemic. It is, therefore, crucial to understand whether training providers are adequately equipped to provide training on these new skills to ensure that these skills gaps are filled in the market. SDFs, training providers and learners were requested to indicate the extent to which they believed that training providers were adequately capacitated to provide training on new emerging skills. The results of the survey are illustrated in the figure below.

Figure 5-39: Extent to which Respondents Agreed that Training Providers are Adequately Capacitated to Provide Training on Emerging Skills



As illustrated in the figure above, the majority of respondents (81%) agreed that training providers are adequately capacitated to provide training on new emerging skills. This was supported by learners who indicated that they believed training providers have the requisite knowledge, personnel and equipment to conduct training initiatives.

“Training providers have the necessary knowledge, people, and equipment to be able to carry out training initiatives.”

(Learners Focus Group, 2022)

Additionally, a respondent from the Hospitality sub-sector added that their business conducted research, planned and established policies that would enable them to conduct training on emerging skills.

“I think so. We had a couple of key people that had taken the reins during the lockdown and did a lot of research, planned, and put policies into place in order to train people once they started coming back to work.”

(SDFs Interview, 2022)

Contrastingly, some stakeholders from the Arts, Culture and Heritage sub-sector, were of the view that training providers were not adequately capacitated to provide training on new skills. This was attributed to a lack of technological skills and a lack of the necessary equipment required to adopt methods such as online training.

“No, I do not think so. This is a very important point. We need to also change the way our educators and facilitators do their work, because we are in 4IR and there [are a] number of elders at schools or tertiary institutions that are still struggling with technology. There is a school in Mpumalanga, that I also work with. That school does not have computers and students there will never be able to practice becoming computer literate. Some interventions are needed as the people do not have the technical skills or the necessary equipment to equip them.”

(SDFs Interview, 2022)

Positive Practices

A representative from a training institution noted that their organisation conducted research, planning and established policies that would enable them to conduct training on emerging skills.

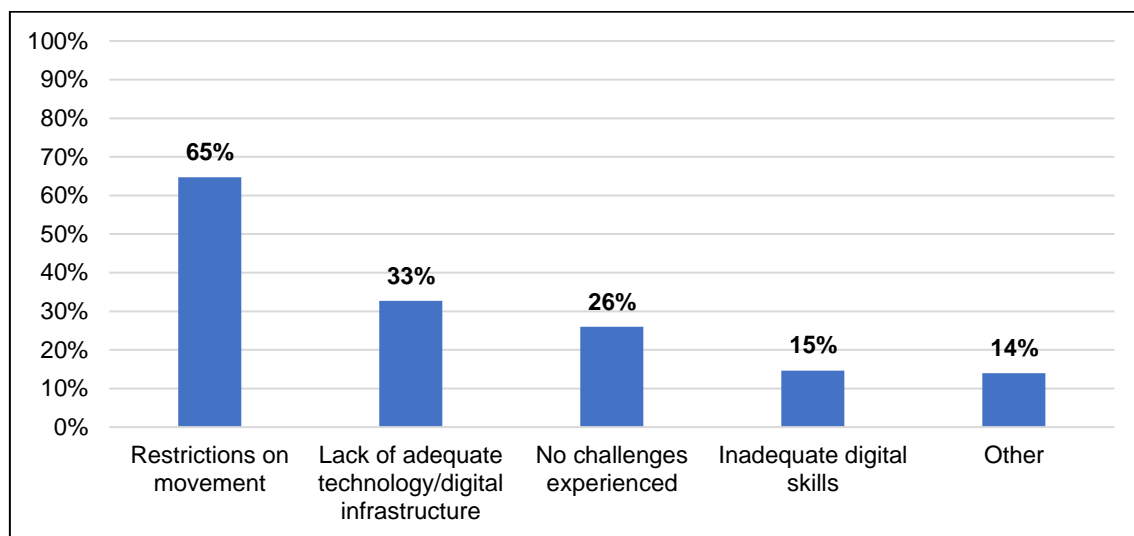
Key Findings

The majority of respondents were of the view that training providers are adequately capacitated to provide training on emerging skills. However, some respondents in the Arts, Culture and Heritage sub-sector were of the view that some training providers lacked the necessary digital equipment, such as computers, and digital skills to effectively conduct training. The lack of ICT resources and digital skills is regarded as a limitation by respondents, particularly due to the increased adoption of online learning that has been necessitated by the COVID-19 pandemic.

5.5.4 The Impact of COVID-19 on Access to Education and Training

The following section seeks to explore the impact of COVID-19 on the ability of learners to access education and training during the pandemic and the extent to which they were able to adapt to the challenges faced while attempting to access education and training.

Learners were requested to indicate the challenges that they experienced while attempting to access education and training during the COVID-19 pandemic. The results are illustrated in the figure below.

Figure 5-40: Challenges Faced by Learners when Attempting to Access Education & Training

Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As illustrated in the figure above, 65% of respondents indicated that a key challenge they faced while attempting to access education and training was the restrictions on movement that were put in place as a result of the national lockdown. For some learners, this meant that they did not have access to educational or training institutions.

“We were not allowed to enter some premises due to COVID-19 restrictions”
(Learners Survey, 2022)

Other learners added that classes would often be postponed due to imposed lockdown levels, resulting in restrictions on the number of people allowed into indoor spaces.

“Whenever we wanted to attend class, it would be postponed due to the country going on another lockdown level that prohibits a gathering of more than 50 people in a room”
(Learners Survey, 2022)

33% of respondents indicated that they faced challenges such as lack of adequate technology/digital infrastructure. Learners indicated that they could not afford the mobile data required to access education and training virtually and in several instances the data purchased was not sufficient.

“Data was a problem during the pandemic. I was a student during that period, and I could not afford data all the time. Most of the times we ran out of data before the month ended.”
(Learners Focus Group, 2022)

In addition to the above, a learner added that their mobile data would often be depleted prior to them being able to complete their online examinations.

“Data ran out before I could complete my online exam for NQF2 apprentice field guide and the network was not friendly in my second attempt.”

(Learners Focus Group, 2022)

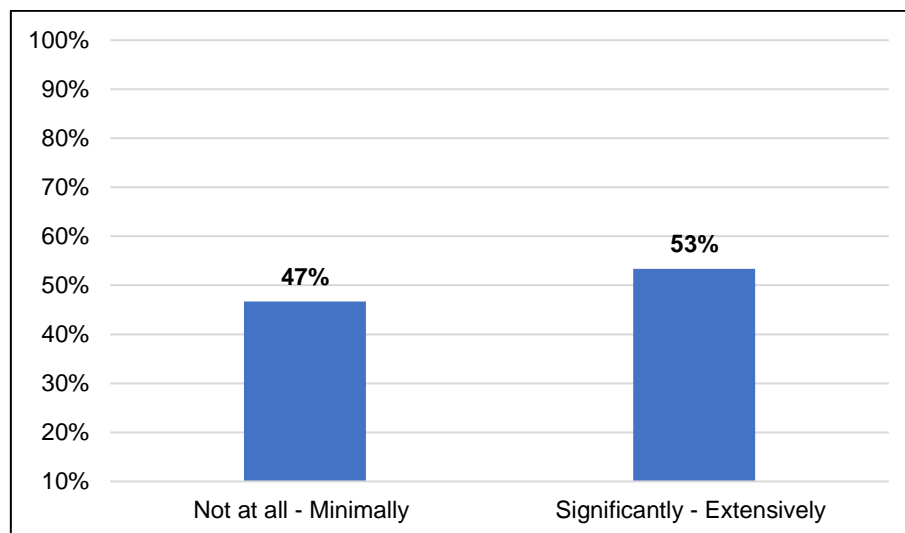
It was noted that 14% of respondents indicated that they experienced ‘Other’ challenges. Among these respondents, some indicated that they could not afford the data required to access the online training.

“[I had a challenge with] data not being affordable.”

(Learners Survey, 2022)

In addition to the results above, respondents were requested to indicate the extent to which they were able to adapt to the challenges they faced while attempting to access education and training during the COVID-19 pandemic. The results are illustrated in the figure below.

Figure 5-41: Extent to Which Learners were able to Adapt to the Challenges Faced



As illustrated in the figure above, 47% of respondents were able to adapt minimally or not at all to the challenges they faced. Contrastingly, 53% of respondents indicated they were able to adapt significantly to extensively to the challenges faced during the COVID-19 pandemic.

One of the respondents, from the Conservation sub-sector, indicated that several measures were put in place in order to assist learners adapt to the challenges they faced during the COVID-19 pandemic. These included assigning mentors to learners to assist with them with using digital platforms and establishing a helpdesk to offer support on IT related queries.

“Learners were assigned mentors to help learners with the transition to technological learning. Our IT department set up a helpdesk to offer support on IT related things. The helpdesk was online – we used the same platform where we provide the mentoring programme. Each learner was assigned to a mentor, and they knew how to contact their mentor. The learners adapted to the environment incredibly well.”

(SDFs & Training Providers Focus Group, 2022)

Positive Practice

It was found that some learners were able to adapt to the challenges faced while accessing education and training during the COVID-19 pandemic, due to measures that were put in place to assist them. These included being assigned mentors to provide assistance with the use of digital platforms and establishing a helpdesk to offer support on IT related queries.

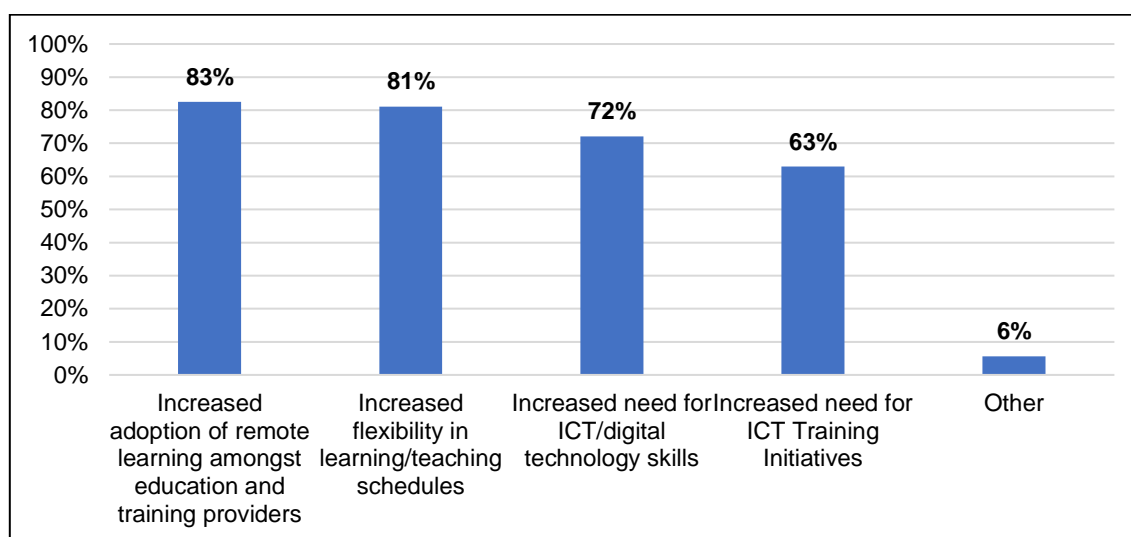
Key Findings

- It was found that learners faced challenges such as being unable to attend classes due to the restrictions on movement that were in place during the national lockdown.
- Some learners indicated that they could not afford the mobile data required to be able to attend online classes and, in some cases, it was found that the mobile data was not sufficient and would deplete prior to learners taking their online examinations.

5.5.5 Emerging Trends in Education and Training

Desk-based research highlighted that some of the emerging trends in education and training included the transition to distance learning and the adoption of ICT in training initiatives as a result of remote working (Mail & Guardian, 2020). The transition to distance learning was necessitated by restrictions on movement as a result of the impact of the pandemic and has increasingly been adopted by skills providers in an attempt to continue providing training to learners (ILO, 2021). ICT has been a major factor in the transition by facilitating learning across multi modal communication styles (Majumdar, n.d.).

To further understand the trends that were emerging in education and training as a result of the pandemic, survey respondents were requested to indicate what new trends they believed had emerged. The figure below illustrates the results.

Figure 5-42: Emerging Trends in Education and Training

Note: Percentages in the above graph may add up to more than 100% because respondents were allowed to select more than one option

As demonstrated in the graph above, 83% of respondents were of the view that there has been an increased adoption of remote learning amongst education and training providers. This is followed by increased flexibility in learning/teaching schedules (81%); an increased need for ICT/digital technology skills (72%) and an increased need for ICT training initiatives (63%).

These results were echoed by respondents from the Hospitality sub-sector, who indicated that their business has transitioned to online training supplemented by in-person training in order to accommodate trainees who do not have the resources to participate in online training. It was added that provisions are made for trainees to attend face-to-face training at least once per week and the organisation prints course material and distributes it to members who do not have computers or tablets.

“Education is going more online, but it is not for everyone, we have hybrid methods of training to meet the needs of different people who have different access to different resources. Innovation has gone into how we deliver training; our online trainings are supplemented by face-to-face training. Even the way you deliver the material has changed. We need to make provisions for the guys to come for face-to-face training at least once per week as they do not understand everything delivered online. We still print materials to drop off at our members, as not everyone has tablets, laptops, and computers”

(SDFs Interview, 2022)

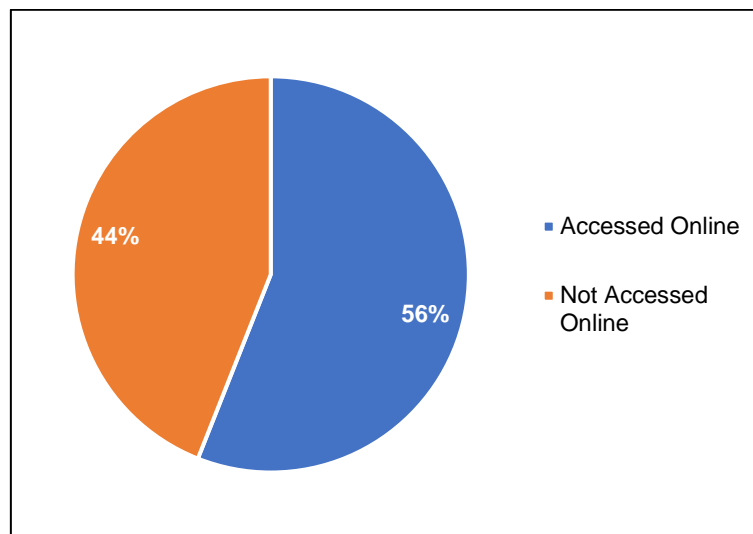
Another respondent added that they had to transition to online learning, as a result of the pandemic and the restrictions imposed. The respondents, thus, had to learn new ICT/digital technology skills and adapt their programmes accordingly.

“We went to online learning during the pandemic, we had to work with new systems and platforms. These were new skills we all had to learn... we had to adapt programs, and think broader on how to develop our learning material. We had e-assessments and e-verifications - we had to do everything online”

(SDFs & Training Providers Focus Group, 2022)

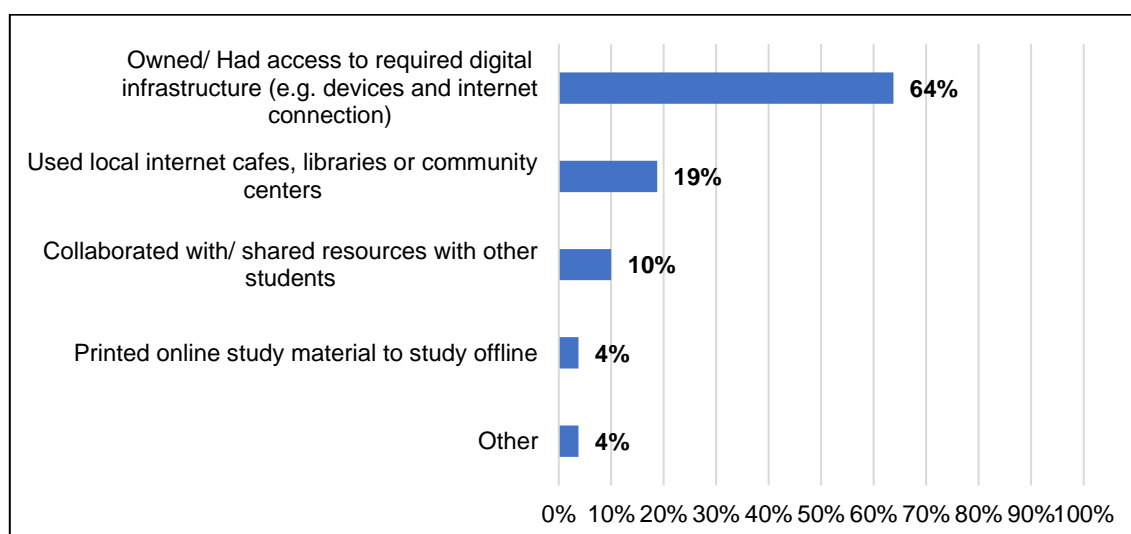
Further to the results above, the study sought to explore the proportion of educational initiatives that were accessed through online platforms during the COVID-19 pandemic. The results of the survey are illustrated in the figure below.

Figure 5-43: Proportion of Educational Initiatives Accessed Online



As depicted in the figure above, when learners were requested to indicate whether the training and educational initiatives they accessed during the COVID-19 pandemic were accessed online, 56% of respondents indicated that they were, while 44% responded that they were not.

It was found in the literature review that there was a lack of access to internet and the digital devices required to either work or study remotely for South Africans. It also highlighted the need for increased initiatives in advancing ICT training and usage (Ahmed, 2020). The study sought to explore the platforms that were used by learners to access online training or educational initiatives, in order to determine the proportion of learners that had access to the required digital infrastructure. Therefore, respondents were requested to indicate which platforms they used to access online training/educational initiatives during the COVID-19 pandemic. The results are illustrated in the figure below.

Figure 5-44: Platforms used to Access Online Training/Educational Initiatives

Note: Percentages in the above graph may not add up to 100% due to rounding off

As can be seen above, 64% of respondents indicated that they owned/had access to the required digital infrastructure (e.g., devices and internet connection) to access online educational initiatives. Additionally, 19% indicated that they used local internet cafes, libraries or community centres, 10% collaborated with/shared resources with other students, while 4% noted that they printed online study material to study offline. A further 4% of respondents indicated that they used “other” platforms to access online training/educational initiatives. When prompted to specify the platforms they used, a respondent indicated that they used their work computer.

“[I] used my work [sic] computer.”

(Learners Survey, 2022)

Positive Practices

It was found that some businesses supplemented their online training initiatives with in-person training in order to accommodate trainees who did not have the resources to participate in online training. Face-to-face training was conducted at least once per week and course material was printed out and distributed to trainees.

Key Findings

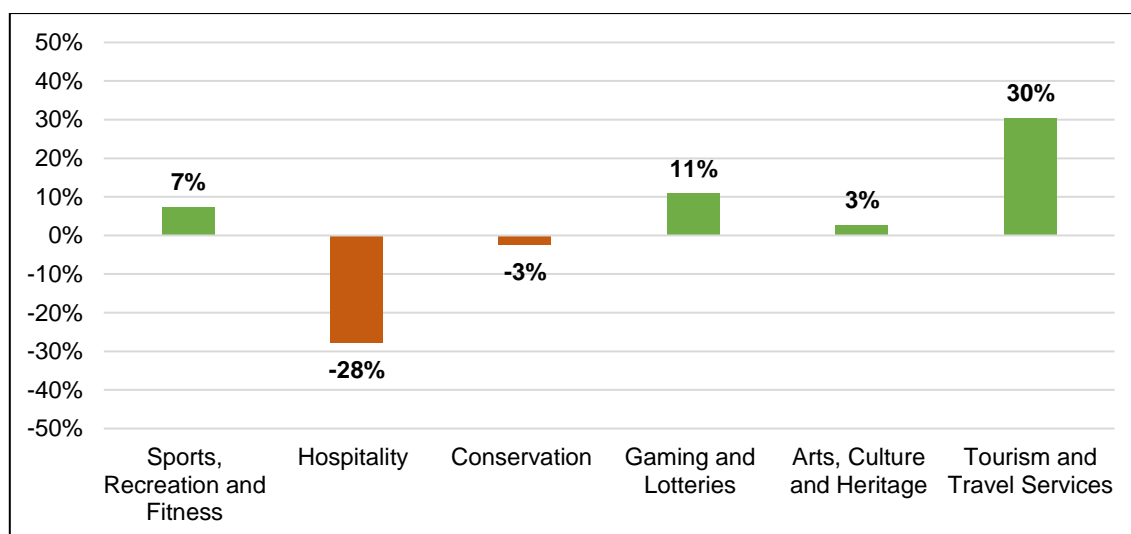
- It was found that there was a need to upskill lecturers on online teaching during the COVID-19 pandemic. Furthermore, training providers had to adapt their programmes in order to transition to online platforms.
- It was found that only 56% of the training offered during the pandemic was accessed through online platforms by learners.

5.6 Projected Impact of Green Pass Certificates on CATHSSETA Sub-Sectors

Section 4.5.2 of this report provided a summary of the desk-based research that was conducted on the implementation of Green Pass Certificates in different countries. The research found that the Green Pass Certificate was considered effective at boosting vaccination rates in vaccine hesitant countries, such as France (The Guardian, 2021). However, it was noted that there were a lack of available studies that detailed the impact of Green Pass Certificates on the economy of countries that had implemented the policy. Subsequently, as discussed in Section 3.4.1, an economic forecasting model was developed to determine the potential impact of Green Pass Certificates on CATHSSETA sub-sectors. The following sections provide an overview of the findings regarding how Green Pass Certificates are expected to impact businesses in CATHSSETA sub-sectors.

The expected impact of Green Pass Certificates on the CATHSSETA sub-sectors was assessed using the number of customers that visit certain establishments in the CATHSSETA sub-sectors as a proxy. The model looked to understand whether the number of customers visiting certain establishments would increase or decrease should Green Pass Certificates be implemented. The results of this analysis are illustrated in the figure below.

Figure 5-45: Projected Impact of Green Pass Certificates on Percentage of Customers Visiting Businesses in CATHSSETA Sub-sectors



As can be seen in the figure above, the implementation of Green Pass Certificates is expected to result in an increase in the number of customers that visit businesses in the majority of CATHSSETA sub-sectors. It is estimated that the implementation of Green Pass Certificates will result in a 30% increase in customers in the Tourism and Travel Services sub-sector, followed by 11% in the Gaming and Lotteries sub-sectors. These results were echoed in interviews and focus groups, where a respondent from the Tourism and Travel Services sub-sector was of the view that vaccinations or mandatory vaccination regulations have been deemed as a necessary measure, particularly by customers, to enable them to travel internationally.

“We are a travel company, and when we think about international travel, there is talk of vaccine passports, or to be vaccinated when you have to travel. So I think it is necessary [in this] industry, especially from an international travel perspective, and we are seeing it in member behaviours when our members were very open with us about not wanting to take the vaccine, but then international travel opened again, and they took the vaccine as one of those necessary steps that you need in order to travel.”

(Employers Survey, 2022)

In addition, businesses in the Sports, Recreation and Fitness sub-sector are expected to experience a 7% increase in customers, while those in the Arts, Culture and Heritage sub-sectors are expected to experience a 3% increase. This was supported by a respondent from the Sports, Recreation and Fitness sub-sector who was of the view that vaccination or mandatory vaccination policies will have a positive impact on their business.

“It will be a good thing to have, as a lot of business will require that. I think it will have a positive impact.”

(Employers Survey, 2022)

Contrastingly, the forecast indicated that businesses in the Hospitality sub-sector, such as, restaurants, bars, hotels, etc., are expected to experience a 28% decrease in customers under the implementation of Green Pass Certificates. While businesses in the Conservation sub-sector appear to be likely to experience a 3% decrease in customers.

The above analysis of the overall change in customers in CATHSSETA sub-sectors was used as a proxy to forecast the impact of Green Pass Certificates on the GDP contribution of each of the CATHSSETA sub-sectors. As discussed in section 3.4.1, the model was developed on the assumption that a change in the number of customers within a sub-sector would directly affect the GDP contribution of that sub-sector, as a result of the potential increase or decrease in economic activity. CATHSSETA sub-sectors that are expected to experience an increase in the number of customers are subsequently expected to experience an increase in GDP contribution. Similarly, sub-sectors that are expected to experience a decrease in customers are expected to experience a decrease in GDP contribution.

The following table provides the latest GDP contribution (in billion rands) for each CATHSSETA sub-sector, against which the forecasted GDP contribution values were measured.

Table 5-4: Latest GDP Contribution of CATHSSETA Sub-sectors

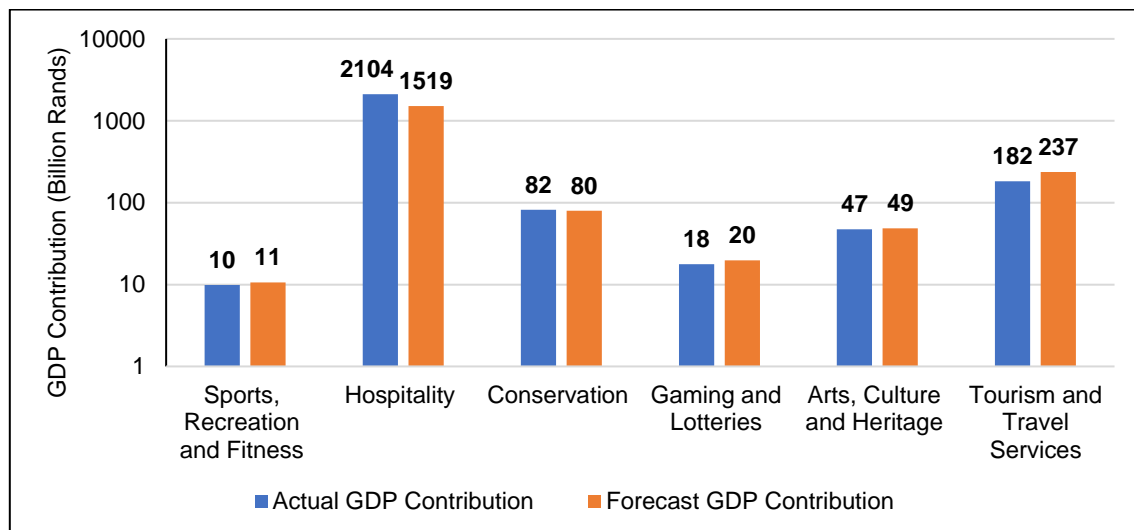
Sub-sector	GDP Contribution (Billion Rands)
Sports, Recreation and Fitness	10
Hospitality	2104

Sub-sector	GDP Contribution (Billion Rands)
Conservation	82
Gaming and Lotteries	18
Arts, Culture and Heritage	47
Tourism and Travel Services	182

Sources: (Statista, 2020); (CATHSSETA, 2020); (SACO, 2022); (NGB, 2021)

In order to determine the impact of Green Pass Certificates on businesses in CATHSSETA sub-sectors, the GDP contributions in the above table are presented alongside the forecasted GDP contribution. The results of the analysis are illustrated in the figure below.

Figure 5-46: Projected Impact of Green Pass Certificates on GDP Contribution of Business in CATHSSETA Sub-sector



As can be seen in the figure above, the implementation of Green Pass Certificates is expected to result in a significant decrease in the GDP contribution of the Hospitality sub-sector, with the forecasted values indicating a decrease from R2,1 trillion to R1,5 trillion in the sub-sector's GDP contribution. The Conservation sub-sector's GDP contribution is expected to decrease by approximately R2 billion. Contrastingly, the Tourism and Travel Services sub-sector is expected to experience a significant increase of R55 billion in GDP contribution under the implementation of Green Pass Certificates. The remaining CATHSSETA sub-sectors are also expected to see an increase in GDP contribution, with the Sports, Recreation and Fitness' GDP contribution expected to increase from R10 billion to R11 billion; and the Gaming and Lotteries and Arts, Culture and Heritage sub-sectors expected to increase by R2 billion, each.

Key Findings

The economic forecasting model on the impact of Green Pass Certificates indicated that the implementation of Green Pass Certificates is anticipated to have a negative impact on the Hospitality and Conservation sub-sectors. It was found that the implementation of Green Pass Certificates would result in a decrease in the number of customers that visit establishments in these sub-sectors (e.g., restaurants, hotels, wildlife parks, zoos, etc.) and consequently result in a decrease in the economic performance of these sub-sectors. However, sub-sectors such as Sports, Recreation and Fitness; Gaming and Lotteries; Arts, Culture and Heritage and Tourism and Travel Services are expected to benefit from the implementation of the Green Pass Certificates, with an expected increase in the number of customers in these sub-sectors and ultimately an increase in GDP contribution.

6 Key Findings and Recommendations

The section below provides an overview of the lessons learned from the COVID-19 research study across the various areas of focus of the study. Furthermore, this section provides an overview of the key findings from the study, as well as the proposed recommendations relating to these key findings.

6.1 Lessons Learned

Lessons learned highlight key positive practices/ positive findings across the various areas of focus of the study. Various strategies that were adopted by stakeholders in response to the COVID-19 pandemic are provided in this section. For example it was found that businesses from the Hospitality sub-sector were able to adapt to the pandemic by providing training on COVID-19 protocols to staff, following protocols and restructuring of their restaurants to meet social distancing requirements. These findings along with the recommendations may be used to inform support measures that are offered to businesses across the CATHSSETA sub-sectors.

Table 5-5: Lessons Learned

Focus Area	Lesson Learned
Benefits Experienced as a Result of the COVID-19 Pandemic	Organisations that experienced benefits as a result of the COVID-19 pandemic cited benefits such as reduced operational costs that resulted in increased savings; an increase in the productivity levels of employees; and an improvement in employees' work-life balance
	It was noted that as a result of the pandemic, some organisations had the opportunity to explore innovative avenues to conduct their business activities more efficiently in the long run. For instance, several training institutions developed and introduced online learning platforms to provide access to their learners
	Some organisations that experienced employee resignations during the pandemic noted that fewer staff were required to conduct operations such as finance related duties, thus identifying inefficiencies that the business was previously unaware of and reducing company costs
Recovering from the Impact of COVID-19	Respondents who believed that their businesses would be able to recover from the challenges faced during the pandemic, in the short term, indicated that they had put measures in place to facilitate this recovery. Examples of the measures put in place included reducing their booking rates to encourage travellers to visit their businesses once lockdown restrictions were lifted.
	Key support that was provided in order to assist businesses recover from the pandemic included financial relief such as UIF, TERS, and bank loans, as well as the relaxation of regulations, such as those regarding the renewal of licences for liquor traders.
Adapting to Challenges Caused by the COVID-19 Pandemic	It was found that businesses from the Hospitality sub-sector were able to adapt to the pandemic by providing training on COVID-19 protocols to staff, following protocols and restructuring their restaurants to meet social distancing requirements.
	It was found that other businesses were able to adapt to the pandemic by modifying their business models. Respondents from the Arts, Culture & Heritage sub-sector indicated that they hosted outdoor and virtual events in an attempt to adapt to the pandemic, while businesses from the Gaming and Lotteries sub-sector were able to adapt by shifting to online platforms for the placement of bets

Focus Area	Lesson Learned
	and playing of lotteries. Businesses from the Tourism and Travel Services sub-sector were able to adapt by targeting domestic travellers instead of international ones
Impact of COVID-19 on Retrenchments	<p>Some stakeholders, such as those from the Hospitality sub-sector were of the view that no additional retrenchments would be required in the short to medium term as they are optimistic about performance and are not currently experiencing financial challenges.</p> <p>It was found that none of the businesses that were surveyed planned to retrench more than 50% of their employees in the short to medium term. This is an improvement from the 22% of businesses that retrenched more than half of staff during the pandemic.</p>
Impact of COVID-19 on Ability to Provide Training	Training providers noted that in order to accommodate learners who did not have access to technology/digital infrastructure, printed learning material was provided. In addition, support was made available to learners through communication platforms such as WhatsApp.
Training on New Emerging Skills	A representative from a training institution noted that their organisation conducted research, planning and established policies that would enable them and ensure they were equipped to conduct training on emerging skills
Impact of COVID-19 on the Access to Education and Training	It was found that some learners were able to adapt to the challenges faced while accessing education and training during the COVID-19 pandemic, due to measures that were put in place to assist them. These included being assigned mentors to provide assistance with the use of digital platforms and establishing a helpdesk to offer support on IT related queries
Emerging Trends in Education and Training	It was found that some organisations supplemented their online training initiatives with in-person training in order to accommodate trainees who did not have the resources to participate in online training. Face-to-face training was conducted at least once per week and course material was printed out and distributed to trainees

6.2 Key Findings and Recommendations

The table below provides an overview of the key findings of the project as well as the recommendations. Key findings were categorised according to the key emerging themes that were identified, while recommendations were provided based on the emerging themes. Recommendations were formulated based on findings and recommendations from previous research studies, additional desk based research and insights gathered from stakeholders through qualitative research. It is worth noting that the recommendations proposed are intended to provide insight on findings that are within or related to CATHSSETA's scope, and therefore, a more focused list of key findings is provided in the table below.

Table 5-6: Key Findings and Recommendations

Focus Area	Key Findings	Recommendation
Businesses' inability to operate due to COVID-19	Overall, 93% of respondents indicated that they were negatively impacted by the COVID-19 pandemic. Businesses in the Tourism and Travel Services and Hospitality sub-sectors were the hardest hit during the pandemic with	<ul style="list-style-type: none"> CATHSSETA should consider conducting training workshops aimed at improving the capabilities of businesses with regard to remote working and how to effectively transition to remote working in order to

Focus Area	Key Findings	Recommendation
lockdown restrictions	businesses in the Tourism and Travel Services sub-sector and the Hospitality sector indicating that they were not able to operate during the hard lockdown and had to cancel/refund bookings, whilst businesses in the Sports, Recreation and Fitness sub-sector, such as gyms, were unable to operate during the COVID-19 pandemic despite reducing their monthly subscription fees.	<p>develop resilience within the sub-sectors. These training workshops can provide a platform for businesses that were able to adapt to the COVID-19 pandemic to share success stories and potentially assist those businesses that were unable to operate during the COVID-19 pandemic.</p> <ul style="list-style-type: none"> Furthermore, CATHSSETA should ensure that social media and digital skills training are made accessible to businesses who require assistance in order to be able to transition to remote working, as well as, to ensure that businesses are adequately capacitated for the 4IR
	Respondents from the Tourism and Travel Services sub-sector were of the view that PCR test requirements for international arrivals should be eased in order to make it easier for international tourists to visit to South Africa.	<ul style="list-style-type: none"> In addition, CATHSSETA may consider offering courses on crisis and risk management for businesses. These courses should assist businesses learn how to develop risk management plans based on lessons learnt from the COVID-19 pandemic. This may enable businesses to minimise the effects of any future stresses and allow them to restore business operations more efficiently. Businesses that primarily conduct their operations on-site should consider encouraging workers to get vaccinated in order in order to facilitate the transition of workers back to offices while prioritising health and safety. Alternatively, businesses may be encouraged to explore the adoption of a hybrid work approach, which offers employees the flexibility of working on-site and remotely. Businesses and employees can agree rotation schedules which would ensure that an adequate number of employees required to conduct on-site operations are available. With regard to travel requirements to enter South Africa, it was announced on 23 March 2022 that vaccinated visitors would no longer be required to submit a negative PCR test result at points of entrance. Unvaccinated guests, however, would still need to provide a PCR test result. As found in the study, less stringent requirements may encourage more individuals to visit South Africa. Further to this, local tourism agencies and tourism establishments should ensure that their marketing strategies place emphasis on the new travel requirements.

Focus Area	Key Findings	Recommendation
Perceived challenges in finding employment	It was noted that the ability of learners to find employment during the pandemic was affected by multiple factors including the freezing of recruitment processes from organisations' side, inability of learners to complete their practical training as a result of restrictions on movement, and delays in receiving certificates from CATHSSETA for completed courses.	<ul style="list-style-type: none"> CATHSSETA should consider conducting a study to further determine the challenges that are faced by learners who have completed CATHSSETA-funded learning programmes when seeking employment. The study should focus on understanding whether the skills that learners obtain from CATHSSETA-funded learning programmes are still relevant and aligned to the skills required by the labour market, considering particularly, the skills that are emerging and the jobs that are becoming redundant as a result of the pandemic. With regard to the perceived delays in receiving certificates, CATHSSETA, as well as accredited training providers and assessors, should ensure that stakeholders understand the timelines associated with receiving certification for completed courses. This will allow stakeholders (especially learners) to manage their expectations. CATHSSETA may also consider conducting a root cause analysis to determine the reasons behind challenges faced in distributing certificates to learners.
Loss of revenue and lack of customers as a result of the COVID-19 restrictions	<p>It was found that the majority of stakeholders experienced challenges during the pandemic. Some stakeholders, including those within the Gaming and Lotteries and Tourism and Travel Services sub-sectors, experienced a loss of revenue due to a loss of customers, as well as declines in demand and supply for products offered</p> <p>Some businesses in the Tourism and Travel sub-sector noted that the challenges they faced necessitated their business to adopt measures such as reducing wages and retrenching some employees</p> <p>The COVID-19 pandemic has impacted the revenue of businesses across all CATHSSETA sub-sectors significantly. It was found that in five of the six CATHSSETA sub-sectors, more than 90% of respondents reported minimal to significant decreases in their revenue. In the Tourism and Travel sub-sector this decrease appeared to be attributed to a lack of international visitors.</p>	<ul style="list-style-type: none"> It was found that support interventions such as the Tourism Relief Fund were available for organisations in the Tourism and Travel sub-sector. The CATHSSETA, in collaboration with government and/or relevant private financing institutions should consider providing similar subsidies to businesses in other sub-sectors, that were/ are unable to operate or generate revenue during the COVID-19 pandemic. This may assist businesses across all sub-sectors cover their costs, such as rent, to stay operational. For businesses that had to retrench employees or reduce wages as a result of the inability to generate revenue, CATHSSETA should consider providing information regarding available relief funds, such as TERS, to businesses across all CATHSSETA sub-sectors. This information can be made available and updated periodically on the 'News' page of the CATHSSETA website

Focus Area	Key Findings	Recommendation
Employee Retrenchments	It was noted that 60% of businesses retrenched employees as a result of the COVID-19 pandemic. Reasons for retrenchments included a decrease in the business' revenue and customers, as well as decreased demand for certain face-to-face roles, such as housekeeping in the Hospitality sub-sector.	<ul style="list-style-type: none"> Businesses that rely on on-site business activities who have the ability to operate remotely and are still struggling due to the pandemic, should be encouraged to adapt their business models to explore innovative ways of conducting business under the current environment. This can involve the adoption of digital technology to market their business and sell their products. For those businesses who need additional support to transition to the new way of working, CATHSSETA may consider providing training to equip them with the required knowledge (e.g., implementing e-learning) and skills (e.g., social media skills, virtual advertising skills) to adapt their business models. Businesses in the Hospitality sub-sector, such as hotels and B&Bs, that had to retrench employees whose jobs required face-to-face engagements (i.e., housekeeping), may adapt their housekeeping protocols to enable them to retain/re-hire employees and accommodate guests. For example, establishments such as hotels/guesthouses/B&Bs could offer guests the option to opt in or opt out of housekeeping services, to make provision for guests that prefer limited physical interactions. This may assist with increasing the demand for these roles, thus allowing businesses to re-employ the retrenched employees on a part-time basis, until the establishments are operating at full capacity again. Where it is financially viable, businesses may consider other alternatives to retrenchments. For example, the study found that some businesses negotiated salary reductions with employees and reduced working hours as an alternative to retrenchments.
	It was found that some organisations were not planning further retrenchments due to a shift in their operating model whereby employees would be appointed on a contractual basis rather than a permanent basis	
Inadequate ICT infrastructure and knowledge regarding how to use	The key challenges experienced while providing education and training included learners' and training providers' lack of access to digital equipment, high data costs, learners' low levels of competency with regard to digital skills	<ul style="list-style-type: none"> CATHSSETA could consider lobbying relevant government organisations and private institutions to provide funding and resources to educational/training institutes to facilitate the transition to online training. Focus can be placed on organisations that offer training in rural

Focus Area	Key Findings	Recommendation
digital technologies impacting access to and provision of training; and business operations	Some learners indicated that they could not afford the mobile data required to be able to attend online classes and, in some cases, it was found that the mobile data was not sufficient and would deplete prior to learners taking their online examinations.	<p>areas where there is lack of ICT infrastructure. This may contribute to the mitigation of the digital divide within the sector and allow for the adoption of the 4IR.</p> <ul style="list-style-type: none"> Educational/training institutes could be encouraged to form partnerships with internet service providers that could provide learners with affordable data options, particularly those with limited or no access to the internet. Additionally, educational/training institutes could work with internet service providers or mobile operators to explore the option of not applying data charges on specific educational web portals where study material is accessed by learners (i.e., Zero-rating)
	It was found that the majority of Businesses in the Conservation and Sport, Recreation and Fitness sub-sectors were not able to adapt to the pandemic. A stakeholder from the Conservation sub-sector indicated that their organisation was unable to adapt to the COVID-19 pandemic due to a lack of ICT resources and their organisation not being ready to adopt new methods of operating	<ul style="list-style-type: none"> Educational/training institutes should look to include downloadable content on their web portals. This will allow learners who do not have reliable internet connectivity to download course material and access it at any time. This can include, for example, recordings of lectures. It was found that some respondents in the study received grants from organisations such as Google, which provided their business with access to online learning environments, which enabled the beneficiaries to adopt digital technologies for training. CATHSSETA should ensure that businesses across its sub-sectors are aware of these opportunities and actively apply for this form of support. To address the lack of knowledge regarding the use of digital / online learning platforms, training providers could offer support to learners by establishing helpdesks or having dedicated IT departments that provide assistance on IT related queries. Assistance can also be provided through communication platforms such as WhatsApp to make it accessible to more learners. In addition to above, educational/training institutions should ensure that learners are aware of the support channels available. This could be done by emailing students information on available support and providing information during classes.

Focus Area	Key Findings	Recommendation
Support Required by Businesses	Several respondents across different sub-sectors indicated that their organisations required increased access to funding opportunities in order to adapt to and recover from the COVID-19 pandemic.	<ul style="list-style-type: none"> To address the lack of financial support provided to businesses, CATHSSETA could conduct workshops that place focus on capacity building and compliance training. This may ensure that businesses are compliant and are in good standing when applying for funding, thereby increasing their chances of receiving financial support. In order to ensure that businesses are aware of the funding opportunities that are available to them, CATHSSETA may consider proactively communicating critical information, regarding funding opportunities, to businesses via email or through their website. CATHSSETA could also consider conducting customised workshops with different sub-sectors to provide them with information on specific funding opportunities available to them (e.g., workshop with Sports, Recreation and Fitness sub-sector's representatives to discuss support available in their sub-sector)
	Some respondents from the Sports, Recreation and Fitness sub-sector were of the view that there is a need for workshops to provide more information to workers about COVID-19	
	Businesses that did not receive support during the pandemic cited reasons such as their business not qualifying for support, their applications being unsuccessful and a lack of knowledge on the support available	
	It was found that the majority of stakeholders, including representatives from the Hospitality sub-sector, expect their organisations to fully recover from the impact of the pandemic in the long term. In order to facilitate this recovery, stakeholders noted that assistance would be required from local tourism agencies to boost the number of customers visiting hotels. They also believed that tenders which were cancelled as a result of pandemic should be re-advertised.	
Increased demand for digital skills and the adoption of online technology	Stakeholders in the Hospitality and Tourism and Travel sub-sectors noted that the shift to online learning during the pandemic, coupled with the Fourth Industrial Revolution, has resulted in an increased demand for digital skills. However, stakeholders also noted that the adoption of these digital technologies and the automation of business activities has resulted in other jobs and skills becoming redundant	<ul style="list-style-type: none"> CATHSSETA's SSP for 2020/21–2024/25 recognises e-learning and digital transformation as priorities within its sub-sectors. As parts of its planned actions, CATHSSETA should ensure that research is conducted to explore financial or non-financial support that can be offered to businesses and training institutes to facilitate the adoption of online technologies and promote digital skills. CATHSSETA may also create awareness around existing upskilling initiatives across its sub-sectors. For example, the study found that some businesses in the Arts, Culture and Heritage sub-sector have established incubation programmes with a focus around upskilling individuals
	It was noted that businesses within the Hospitality sub-sector require assistance with regard to transitioning to online training in order to enable them to recover from the COVID-19 pandemic	

Focus Area	Key Findings	Recommendation
	It was found that there was a need to upskill lecturers on online teaching during the COVID-19 pandemic. Furthermore, training providers had to adapt their programmes in order to transition to online platforms.	<p>on the use of technology, social media, web development, etc., in order to increase access to markets and help businesses adapt to the COVID-19 pandemic. CATHSSETA may consider promoting these initiatives by making information available on their website or part of their newsletter.</p> <ul style="list-style-type: none"> • The CATHSSETA SSP for 2021/22 – 2024/25 highlights the need to acknowledge short courses as legitimate forms of learning. As such, in order to prioritise digital upskilling, short courses that focus on ICT skills should be made available to learners and training providers. Additionally, ICT skills can also be included as an introductory module in other CATHSSETA courses. • In addition to above, CATHSSETA should ensure that accredited training providers include an introductory module in their courses to assist learners with the adoption of digital technology. The module should focus on the fundamental introductory knowledge (e.g., navigating online learning portal, sending emails and understanding components of a computer) required to successfully access virtual training initiatives.
	It was found that assessments in the Sports, Recreation and Fitness sub-sector could not be conducted due to a lack of assessors to conduct them virtually	
	Some respondents were of the view that it would take 6 to 18 months for their organisation to recover from the impact of the pandemic. Stakeholders indicated that exploring new marketing avenues such as the use of online platforms to publish their professional videos would allow their business (theatres) to reach wider audiences and would ultimately help them recover from the impact of the pandemic.	
Perceived lack of available funding; and financial constraints impeding ability to provide training	It was found that majority of businesses could not provide training to their employees during the pandemic, mainly due to financial constraints	<ul style="list-style-type: none"> • CATHSSETA should ensure that organisations are aware of the procedures to follow and requirements to meet when applying for Mandatory Grants. Information regarding the benefits of the Mandatory Grants and the requirements for receiving the grants can be made easily accessible on the CATHSSETA website. This may assist businesses understand the potential funding avenues available for training. • Businesses should conduct research to explore funding opportunities that are available for training. Similarly, trainees should be encouraged to actively apply for scholarships or bursaries.
	It was found that the majority of businesses' training budgets were negatively affected by the COVID-19 pandemic. Some of the reasons cited by stakeholders included having fewer members employed during the pandemic and businesses re-allocating their training budget to other areas, such as the establishment of IT infrastructure, to ensure the survival of their business during the pandemic	

Focus Area	Key Findings	Recommendation
Emerging Skills	<p>The skills that were identified as emerging as a result of the COVID-19 pandemic included;</p> <ul style="list-style-type: none"> • Social media training to enable businesses to effectively market their products and services; • Risk management; • Strategic planning; • Decision making; • ICT skills; • Financial skills; • Marketing and sales skills; • Disaster recovery; and • Business Rescue. <p>Stakeholders noted that jobs such as, COVID-19 compliance inspectors appeared to be emerging</p> <p>The majority of respondents were of the view that training providers are adequately capacitated to provide training on emerging skills. However, some respondents in the Arts, Culture and Heritage sub-sector were of the view that training providers are not adequately capacitated as some lacked the necessary digital equipment such as computers, while the staff did not have the requisite digital skills</p>	<ul style="list-style-type: none"> • The CATHSSETA SSP 2021/22 – 2024/25 recognises the emergence of new skills and occupations and highlights the need to conduct career guidance initiatives to guide the youth to emerging occupations across its sub-sectors. The emerging skills and jobs highlighted in this study should, therefore, be considered by CATHSSETA along with those found in the SSP to inform the SETA's planned actions. For instance, focus may be placed on encouraging businesses to undertake social media/digital marketing training. This may enable businesses to leverage digital technologies to market their products and services on online platforms. • CATHSSETA should ensure that training providers are equipped to provide training on emerging skills. The SETA may consider conducting a study to further determine whether training providers are adequately capacitated to provide training on emerging skills and where the potential gaps may be. CATHSSETA can use these findings to determine the support that can be provided to training providers to ensure they are adequately capacitated to provide training on emerging skills.
The projected impact of Green Pass Certificates on CATHSSETA Sub-sectors	<p>The economic forecasting model on the impact of Green Pass Certificates indicated that the implementation of Green Pass Certificates is anticipated to have a negative impact on the Hospitality and Conservation sub-sectors. It was found that the implementation of Green Pass Certificates would result in a decrease in the number of customers that visit establishments in these sub-sectors (e.g., restaurants, hotels, wildlife parks, zoos, etc.) and consequently result in a decrease in the economic performance of these sub-sectors. However, sub-sectors such as Sports, Recreation and Fitness; Gaming and Lotteries; Arts, Culture and Heritage and Tourism and Travel Services are expected to benefit from the implementation of the Green Pass Certificates, with an expected increase</p>	<ul style="list-style-type: none"> • Businesses in the Sports, Recreation and Fitness; Gaming and Lotteries; Arts, Culture and Heritage, and Tourism and Travel Services may consider implementing vaccine mandates for their businesses, such as requiring customers to provide proof of vaccination to enter the establishment • Alternatively, businesses may consider communicating with customers on the measures taken by the businesses to ensure a safe guest experience. Businesses may provide a summary of their health and safety measures on their websites, social media pages and around the establishment. This is intended to encourage customers to visit the establishment should they feel safe.

Focus Area	Key Findings	Recommendation
	in the number of customers in these sub-sectors and ultimately an increase in GDP contribution.	
The ERRP	It was found that stakeholders from sub-sectors such as Hospitality, Sport, Recreation and Fitness and Conservation appeared to have limited to no knowledge with regard to the ERRP.	<ul style="list-style-type: none"> • CATHSSETA should create awareness of the ERRP amongst its stakeholders. This can be done by publishing information on the ERRP, as well as Sector Specific Plans on its platforms. The published information should aim to encourage businesses to develop an understanding of the ERRP and understand the role they can play in order to support the recovery of the economy. • In addition, workshops could be conducted with businesses to provide them with interactive platforms to share the assistance they may require to be able to contribute to the implementation of the ERRP.

7 Identified Funding/Training Opportunities and Emerging skills

The following section provides a list of the funding opportunities and relief funds that were identified through the study, that contributed to the recovery of some of the businesses across CATHSSETA sub-sectors. Additionally, the section provides a list of skills that have emerged as a result of the COVID-19 pandemic that CATHSSETA may consider in addition to the skills gaps identified while compiling the organisation's SSP.

During the desk-based and fieldwork research undertaken during the study, funding opportunities and relief funds that were available to stakeholders during the COVID-19 pandemic were identified in the study. These included:

- Tourism Relief Fund
- DSAC Relief Fund
- BASA Artist Relief Grants
- UIF COVID-19 TERS

In addition to the above, several skills were deemed to be emerging by stakeholders who participated in the study. It was recommended in the study that workshops and training initiatives on some of these skills may enable businesses to adapt to and recover from the COVID-19 pandemic. These included:

- Social media skills
- ICT skills
- Risk management skills
- Strategic planning skills
- Decision making skills
- Financial skills
- Marketing and sales skills
- Disaster recovery skills
- Business Rescue skills
- Customer service skills
- COVID-19 compliance related skills

8 Conclusion

The purpose of this study was to understand the impact of COVID-19 on CATHSSETA's sub-sectors and its implications on skills development. The study revealed a range of key findings including that, the majority of businesses across CATHSSETA sub-sectors faced challenges such as loss of revenue; the inability to operate due to restrictions on movement; employee retrenchments; and the inability to provide training during the COVID-19 pandemic. Despite these challenges, a large proportion of businesses (68%) were able to adapt to the pandemic, while others reported that support measures such as increased access to funding opportunities, would enable them to adapt and recover from the COVID-19.

The study found that 94% of respondents across all CATHSSETA sub-sectors indicated that their businesses experienced a decrease in revenue as a result of the COVID-19 pandemic. It was noted that the only sub-sectors in which respondents indicated that their businesses experienced an increase in revenue were the Arts, Culture and Heritage sub-sector (17%), Hospitality (3%) and Tourism and Travel Services sub-sector (4%).

The study further assessed the impact of COVID-19 on remote working, in which it was found that the majority of businesses (67%) only have 0% - 5% of their workforce currently working remotely with remote work only being considered upon special requests from staff in certain businesses. It was further noted that the majority of businesses (76%) expect only 0%-5% of their workforce to continue working remotely post the COVID-19 pandemic.

Additionally, the study sought to determine some of the benefits that were experienced by businesses as a result of the COVID-19 pandemic. It was found that the majority of businesses (58%) did not experience any benefits as a result of the COVID-19 pandemic. Businesses that experienced benefits as a result of the COVID-19 pandemic cited benefits such as reduced operational costs that resulted in increased savings; an increase in the productivity levels of employees; and an improvement in employees' work-life balance. In contrast, businesses that faced challenges during the COVID-19 pandemic cited challenges such as loss of revenue due to a loss of customers, as well as declines in demand and supply for products offered.

The COVID-19 pandemic had several implications on employment across different sub-sectors, with the majority of organisations (60%) having retrenched employees at the time the study was conducted. It was found that the majority of businesses (83%) in the Tourism and Travel Services sub-sector retrenched employees as a result of the pandemic, followed by 75% of businesses in the Sports, Recreation and Fitness sub-sector. Furthermore, the study assessed the impact that the COVID-19 pandemic had on learners' ability to find employment. Learners indicated that they faced several challenges while attempting to find employment, which included the ceasing of recruitment processes from organisations' side and the inability of learners to complete their practical training as a result of restrictions on movement. In addition, the study found that the emergence of ICT jobs and skills, and an increased adoption of 4IR and remote learning were identified as change drivers that have influenced occupational patterns. These change drivers have also presented the need for training on digital

technologies and the provisioning of adequate ICT infrastructure across CATHSSETA sub-sectors.

Furthermore, it was found that training, and educational initiatives were negatively impacted by the COVID-19 pandemic with the majority of organisations (61%) reporting that they were unable to provide training during the pandemic. It was also found that 82% of respondents indicated that their business' training budget was significantly to extensively affected by the COVID-19 pandemic. Key challenges faced by training providers while attempting to provide educational/training initiatives included a lack of access to adequate technology or digital infrastructure while learners indicated that challenges such as their inability to afford high data costs prevented them from accessing training during the pandemic. On another note, the increased adoption of remote learning amongst education and training providers was noted as one of the emerging trends in education and training.

The study also explored the potential impact of Green Pass Certificates on CATHSSETA's sub-sectors. It was found that the implementation of these certificates would negatively impact sub-sectors such as Hospitality and Conservation, as it is forecasted that the proportion of customers visiting establishments in these sub-sectors would decrease should they be required to be fully vaccinated to access the establishments. Other CATHSSETA sub-sectors, however, are expected to experience an overall increase in customers, which, as a result would positively impact their contribution to the economy.

In conclusion, the study highlighted the need for adequate support measures from CATHSSETA, relevant government departments and private institutes to be provided to businesses across the sub-sectors to enable their recovery from the COVID-19 pandemic. Apart from financial support, it was highlighted that businesses require workshops around COVID-19 education and ICT skills training. Furthermore, CATHSSETA is encouraged to create more awareness around the ERRP and the roles that businesses can play in its implementation, as it was found that some stakeholders are unaware of the initiative.

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