SECTOR ANALYSIS:

Hospitality, Conservation and Tourism and Travel Services sub-sectors

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SECTOR ANALYSIS: HOSPITALITY, CONSERVATION AND TRAVEL AND TOURISM SERVICES SUB-SECTORS

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SECTION 1: INTRODUCTION

1.1 Introduction and background

Tourism is a multi-sectoral industry that includes travel and tourism services, hospitality and conservation amongst others. Tourism is widely considered to be a viable vector for sustainable socio-economic development on the African continent due to the integrative nature of its value chain (forward and backward linkages with suppliers and service providers), as well as economic multiplier effect (tourism receipts, export products, employment creation, local economic development) (Matiza & Slabbert, 2019). However, considering the COVID-19 pandemic-induced moratorium on international travel, foreign arrivals dropped by 71% from 15.8 million to less than 5 million in 2020. The decrease in tourists had a significant impact on employment figures which also decreased. In 2019 the tourism industry contributed 9.3% to the total number of jobs in South Africa; this decreased to a 7% contribution in 2020 and between 7% and 7.3% in 2021 – thus decreasing from 1.51mn positions in 2019 to 1.08mn in 2021. The contribution to the Gross Domestic Product was 6.4% in 2019, 3.1% in 2020 and 3.2% in 2021 (World Travel & Tourism Council, 2022). The tourism industry has been the most brutal and fastest hit by COVID-19, but the industry's last numbers show the sector's potential in the recovery phase (OECD, 2020).

Due to the lack of income, uncertainty around the duration of the pandemic, businesses closing down, and lack of tourists, many workers in the tourism industry moved to other sectors. However, there is an urgent need to employ experienced, skilled travel professionals (Anon, 2021) or to up-skill those in all industry sub-sectors. Tourism remains a labour-intensive sector that still offers opportunities to grow the economy and provide job opportunities. Suppose the South African tourism sector is to be resilient and advanced as a catalyst for economic recovery in the South African post-COVID-19 pandemic era. In that case, fundamental changes - such as offering services that better meet contemporary tourist demand and preferences - will need to occur within the South African labour market.

One of the interventions identified in the Economic Reconstruction and Recovery Plan is mass public employment with skills development as an enabler. The key to making the right decisions in the future is the assessment of current skills across all industry sub-sectors and forecasting the future needs post-COVID-19. This will contribute to the industry's recovery and align the expectations and outputs of employers, employees, and tourists. There is currently a real need for research to provide South African tourism practitioners, education institutions, and policymakers with critical insights into the labour market. These insights will support South Africa's tourism recovery with data-driven, empirical evidence-based recommendations. Thus, the focus of the research was to determine and bridge the skills gap in the tourism industry post-COVID-19, with a specific focus on Tourism and Travel Services, Conservation and Hospitality – this report focuses specifically on the Conservation Sector.

1.2 Context and rationale of the study

The sustainable growth and development of the tourism industry depend on attracting and retaining an efficient labour market, thereby ensuring resilience. While the sheer scale and impact of the COVID-19 pandemic on the global travel and tourism industry are yet to fully unfold (McLaughlin, 2020), tourism recovery from external shocks associated with epidemics and disease outbreaks is estimated to take an average of 19.4 months. It can significantly impinge on the medium to long-term demand for travel and tourism (Global Rescue & World Travel and Tourism Council, 2019). The effect on the labour market is evident. As we advance in the industry's recovery, the look and feel of the labour market are unknown, which can contribute to a slow recovery process. It is challenging to determine the short and medium impacts of the pandemic, but it is critical for future planning.

According to Martins, Riordan and Dolnicar (2021), the vulnerability of the tourism labour force became evident during the pandemic. Several employees in the industry rely on non-standard and contingent arrangements, which lack entitlements such as annual, sick, and careers leave (Markey & McIvor, 2018; Goods, Veen & Barratt, 2019). This leads to insecurity and income instability which can negatively affect mental health and increase societal gaps (Robinson, Martins, Solnet & Baum, 2019). With tourism forming part of the high-risk job context, aspects such as exposure, risk and coping capacity are also important (Sun, Li, Lenzen, Malik & Pomponi, 2022). During the pandemic, these disadvantages were highlighted, and people questioned the long-term viability of working in the industry. A different approach is needed to ensure workforce resilience in the tourism industry.

1.2.1 Tourism development and employment growth

According to the World Travel and Tourism Council (2019), travel and tourism (T&T) contributed 8.6% to the South African economy and provided for 9.2% of total employment within the country. This direct contribution to the GDP was 3.7% in 2019 which decreased to 2.2% 2020 (SA Stats, 2023). It is forecasted that the South African Travel & tourism industry will grow at a rate of 7.6% annually over the next decade bringing the contribution to the GDP to 7.4%. (WTTC, 2022).

Regarding creating employment, the tourism industry has remained resilient despite challenging economic conditions. Tourism generated almost 32 000 new jobs in 2017 (STATS SA, 2018) which increased to 478,900 new jobs generated in 2020 (3.2% of total employment). The travel and tourism industry contributed 459 533 direct jobs in 2020 and 780 096 direct jobs in 2019. Significant job losses were experienced in road passenger transport, followed by food and beverages, accommodation and travel agencies (SA Stats, 2023). In 2018 one in every 22 working South Africans was employed in the tourism industry (SA Stats, 2019) whereas in 2019 1 in every 21 employed individuals formed part of the industry. The food and beverage serving industry is the second biggest employer, followed by accommodation in 2017. Together, these three industries contributed almost 70% to total tourism employment in 2017 (SA Stats, 2019). In 2019 the biggest contributor to direct employment was road passenger transport which include taxis and buses that move domestic and visitors across the country. The food and beverage sector contribution 19%, accommodation 15% and travel agencies 4% (SA Stats, 2021). The decrease in tourism employment in the last two years was expected given the tight restrictions that were imposed on leisure travel across the world and specific regulations (namely the temporary alcohol ban and curfew time) that reduce the enjoyment of going on holiday, even domestically (Asmal & Rooney, 2021).

With the number of international tourists visiting our shores increasing from 10,0 million in 2016 (STATS SA, 2017) to 10,3 million in 2017 (STATS SA, 2018) and 10.47 million in 2018, the tourism industry was set to remain an important driver of job growth in particular industries. However, the number of tourists decreased to 10.23 in 2019, 2.8 million in 2020 and 2.26 million in 2021 (Statista, 2023). The domestic visitors contributed significantly to tourism expenditure with 73% of the R451.5 billion. The United Nations World Tourism Organisation (UNWTO), however, expects the industry to return to pre-crisis levels only in 2023 – in the meantime, we should build resilience in the labour market.

The Micro, Small and Medium sized enterprises (SMMEs), which represents the bulk of tourism organisations (OECD, 2019), were also hit by the pandemic with little to no income, job losses and even closures. However, the organisations contribute to local economies and provide jobs so lower skilled entry-level positions which are critical moving forward. This sector in the EU also attracts young workers, acting as a first entry point to the labour market for recent graduates and a response to youth unemployment. It also offers easy employment access to vulnerable groups, such as women (almost two-thirds of the workers in the sector) and migrants (Anon, 2020). This is no different in South Africa (De Beer, 2011; Stemele, 2019). The importance of the tourism industry as an employer is clear, but the challenges facing employment are also evident.

1.2.2 Skills in the broader tourism industry

As it is known today, tourism education has come a long way. It began in Europe, where vocational schools were developed to train people in the basic management skills needed to succeed in the tourism and hospitality sub-sector (Morgan, 2004). Education and training aim to produce industry-competent employees who can satisfy the current and future needs of the industry (Baum & Szivas, 2008; Inui, Wheeler & Lankford, 2006; Wong, 2008). The tourism industry is characterised by its dynamic environment and the unprecedented transformation of the workplace caused by COVID-19 (Villar, 2020). COVID-19 sped up the ecological transition to creating a growing awareness of environmental issues and behavioural changes, as well as a more fluid concept of work based on trust between the employer and employee. Workforce needs shifted quickly and dramatically. These changes require a different skill set to take the industry forward and be more sustainable (Villar, 2020).

Various authors indicated the type of skills needed post-COVID-19, which include aspects such as adaptability, tech intelligence, emotional intelligence, continuous professional development, critical thinking, cooperation and creativity (Villar, 2020), self-awareness and self-management, communication, and innovation (Browne, 2021). There is a higher need for digital skills in the new environment due to the digitalisation of tourism services. Assaf and Tsionas (2018) stated that it is changing the industry's structure by revolutionising distribution channels, optimising the internet, facilitating price comparison, and many more. This will stay post-COVID-19. The status of digital skills in the tourism industry is still being determined across all subsectors, and economic efficiency and productivity will be lower if these skills are lacking.

Identifying current and future skills is essential; one needs to assess the transferability of skills that can be redirected during times of crisis or shifts in the economy. With the multi-sectorial tourism industry, the transferability of skills within and across sectors is worth assessing (Martins et al. 2021). Transferable skills give flexibility allowing people to move between different sectors and use available opportunities – in many cases, undervalued (Snell, Gekara & Gatt, 2016). We must redesign the workforce model whilst rebuilding the South African tourism industry.

1.3 Purpose of the study

To bridge the gaps between South Africa's tourism supply and workforce, the commissioned study sought to analyse the tourism sector (T & T services, Conservation and Hospitality) to assess the skills, skills gaps and requirements of the South African tourism sector.

1.4 Objectives of the study

The objectives related to the hospitality sub-sector include the following:

- **Identification and analysis of the critical role players**
- **Determining the hospitality sub-sector's economic performance**
- **Determining and analysing the employer profile**
- **Analysing the labour market profile and**
- **Determining the factors affecting skills demand and supply.**

SECTION 2: ECONOMIC PERFORMANCE AND LABOUR FORECASTING

2.1 Introduction

While the tourism industry has grown significantly over the past 3 decades, with international tourism increasing from a mere 1 million in 1990 to more than 10 million in 2019, the COVID-19 pandemic and the subsequent lockdown and travel restrictions had a devastating impact on the industry. As expected, the recovery is slow and by the end of 2022, tourism to sub-Saharan Africa was still 40% less compared to 2019 (UNWTO, 2023). Data from Statistics South Africa (P0351 reports) also shows that 5.5 million tourists entered South Africa during 2022, a mere 55.7% of 2019 arrivals.

Similar to other countries, domestic tourism has provided a lifeline for many South African tourism businesses during the extended pandemic. However, latest information from Statistics South Africa (P0532 report) shows the extent of loss the tourism industry had to deal with during 2020. Domestic day trips fell from approximately 83 million to less than 12.5 million between 2019 and 2020, while domestic overnight trips declined from 69 million to approximately 7.5 million trips. Domestic tourist expenditure during 2020 was approximately 10% of its 2019 value. According to Tourism South Africa statistics, the year 2021 also saw low domestic tourism numbers, but that changed drastically during 2022, with the number of trips exceeding that of 2019.

According to the World Travel & Tourism Council (2019), travel and tourism contributed 8.6% to the South African economy and provided for 9.2% of total employment within the country prior to the pandemic. Since large sections of the tourism industry, such as accommodation, food and beverage services, are labour intensive, the industry remains an important job provider in any economy. In addition, the industry is also key to the economy, since it provide opportunities to lower skilled job applicants.

As indicated in the rationale for the project, the key to making the right decisions going forward include forecasting the future needs (post-COVID-19) in order to align the expectations and outputs of employers, employees, and tourists. The success of the industry's recovery not only depends on a growth in demand, but also in securing the labour necessary to supply the products needed. Forecasting the future outlook for the industry and its subsectors are therefore critical for future planning.

2.2 Labour elasticities

A recent study by Minnaar (2017) indicated that some of the most accurate forecasts for labour demand in the hospitality industry can be generated by making use of labour elasticities. In this approach, the demand for labour (LD) depends on the demand for the good/service (Y) that it produces. In other words,

$$LD_i = f(Y_i)$$

According to economic theory, an increase in the demand for a certain good will cause an increase in production, which necessitates more labour. Therefore, a positive relationship between the demand for labour and production of goods and services is expected.

The data for the modelling were sourced from Statistics South Africa's Tourism Satellite Accounts, which divides the tourism industry into the following sub-sectors (i), among others:

- Accommodation
- Food and Beverages
- Road transport services
- Travel agencies and similar
- Sport and recreational services

The information contained in the Accounts not only include tourist demand (foreign and domestic), but also total supply as well as employment. Although the time series is relatively short, it is sufficient for basic regression analysis. The Classical Linear Regression Model was utilised, and natural logs of the variables were taken to deliver coefficients that are elasticities. The interpretation of an elasticity is as follows: it measures the percentage change in labour demand due to a 1% change in the demand for the product/service in question.

To control for outliers, dummy variables were coded and included in some (but not all) model specifications. In addition, the residuals of the models were saved and added in an error correction model specification to test the validity of the long run elasticities derived. Since the short run elasticities are not significantly different from zero, only the long-run elasticities are reported. These elasticities are significantly different from zero and the error correction term is also significant in all specifications, validating the long run elasticities.

The table below summarises the elasticities, and also indicates the average share of tourism expenditure in each sub-sector (up to 2019). This is important, since a decline (increase) in tourism, will cause a more severe decline (increase) in a sub-sector that is more dependent on tourism than in a sub-sector that is less tourism dependent.

Table 2.1: Summary of the elasticities

Sub-sector	Tourism dependence as % of total output	Labour elasticity	Speed of adjustment
Accommodation	95.7%	0.32	1.5 years
Food & Beverages	11.0%	0.63	1.3 years
Road Transport	34.7%	0.24	2.1 years
Travel Agencies & similar	97.9%	0.32	1 year
Sport & Recreational Services	28.6%	0.11	1 year

From the table it is evident that the sub-sectors that are most dependent on tourism are (i) travel agencies (97.9%) and accommodation (95.7%). The food and beverage industry is the least dependent on tourism, with only 11% of its output dependent on tourism activity. This is not surprising, since all fast-food outlets and restaurants form part of this sub-sector, and they are frequented by their respective communities.

The labour elasticities reveal that a 10% growth in demand will cause a 6.3% growth in the demand for labour in the food and beverage industry, and a 3.2% growth in the demand for labour in the accommodation and travel services industries. In addition, the 10% growth in demand will cause a 2.4% increase in the demand for labour in road transport and a 1.1% increase in labour demand for sport and recreational services.

The speeds of adjustment indicate that changes in the demand for road transport takes the longest to filter through to a change in labour demand (2 years). In all the other industries, a change in demand will lead to a change in labour demand within 1.5 years.

2.3 Forecasting economic performance in tourism-related sectors

Forecasting tourism-related expenditure during “normal” times are data- and model-driven. These model-based forecasts are not accurate in times of crisis or pandemics and require judgemental adjustments to model-based forecasts. The forecasting model developed in this section uses time series methods to model expenditure (production) during “normal” times. The time series forecasts are used as a baseline. To take account of the uncertainties surrounding the recovery from the pandemic, the baseline will be adjusted based on more recently available data, after which it will be linked with the labour elasticities and subsequent labour demand.

Since the Satellite Account indicated that only 2 sectors are heavily dependent on tourism (more than 50% of their total demand), the decision is taken to forecast sub-sector output (or economic performance) rather than tourism demand (or expenditure). The short time-series limits alternatives, but general smoothing algorithms. Various smoothing forecasts were used, and the forecasts evaluated using the Mean Absolute Error, Root Mean Square Error and Root Mean Percentage Error. The forecasts with the lowest errors were subsequently chosen as the "best" forecast up to 2025. For the various sub-sectors these best forecasts were the following:

Table 2.2: Forecast summary

Sub-sector	Smoothing forecasting method	MAE	RMSPE
Accommodation	Holt-Winters Additive	0.54	2.30%
Food & Beverages	Holt-Winters Multiplicative	18.67	1.35%
Road Transport	Holt-Winters Non-seasonal	146.46	3.92%
Travel Agencies & similar	Holt-Winters Non-seasonal	1.71	6.0%
Sport & Recreational Services	Holt-Winters Non-seasonal	4.83	1.05%

Not taking the effects of Covid-19 into consideration, the forecasting graphs of the different subsectors were as follows:

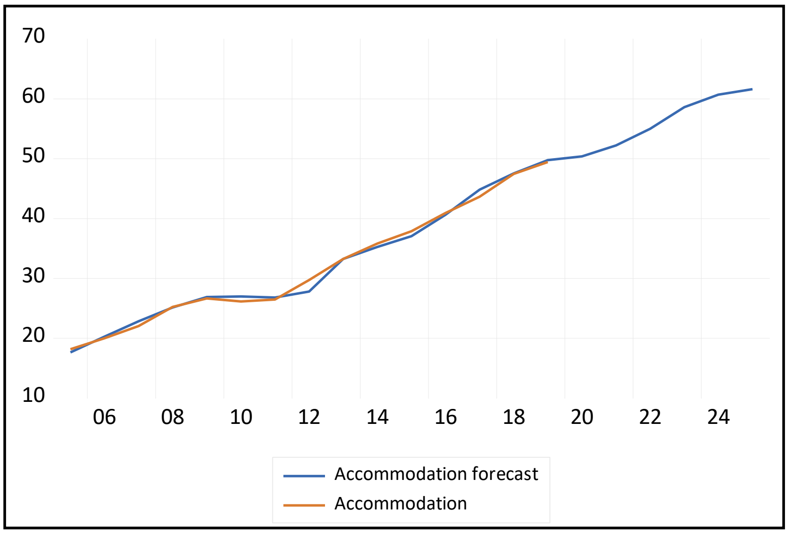


Figure 2.1: Accommodation forecast

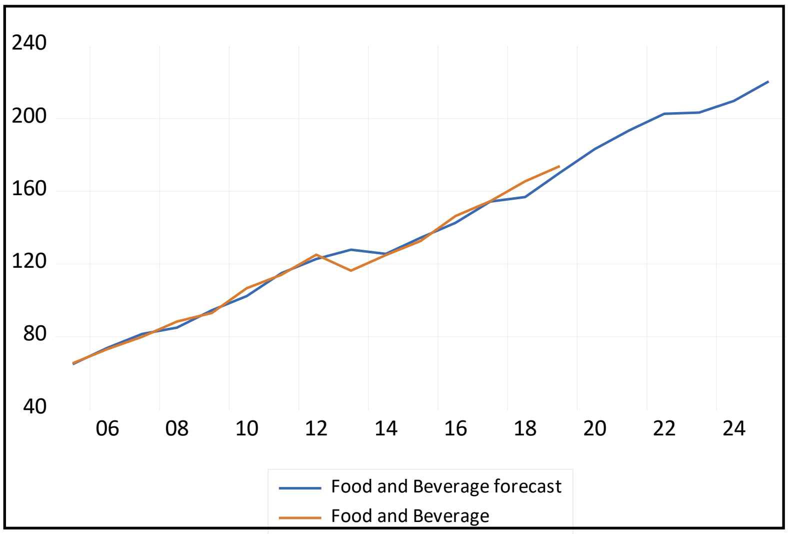


Figure 2.2: Food and Beverage forecast

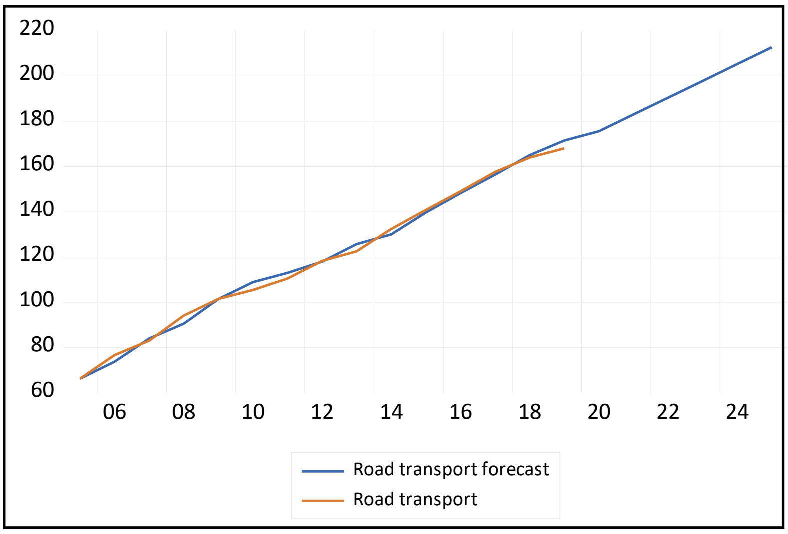


Figure 2.3: Road transport forecast

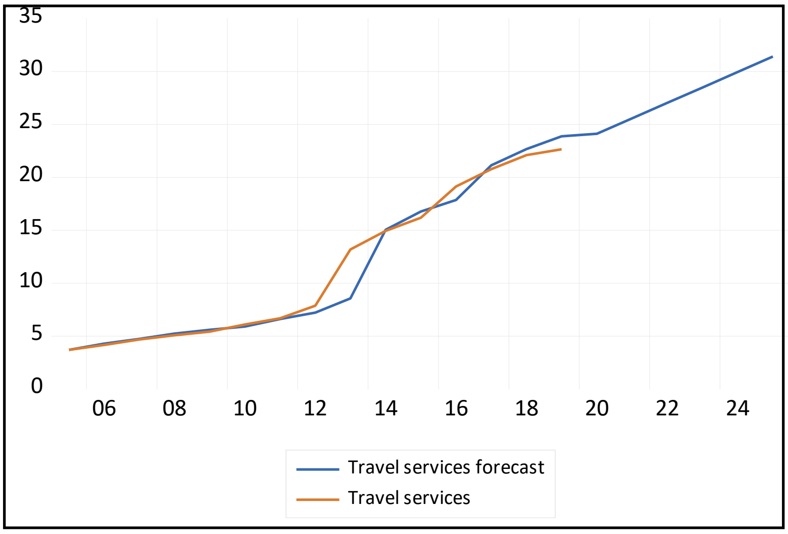


Figure 2.4: Travel services forecast

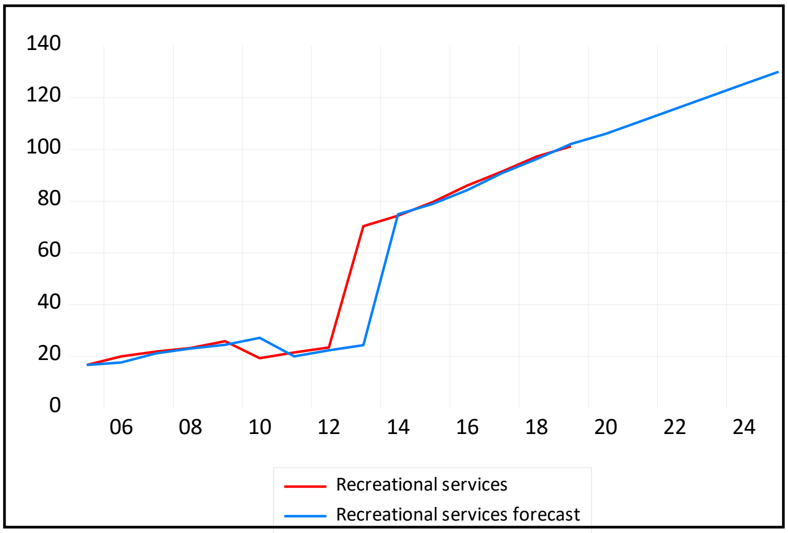
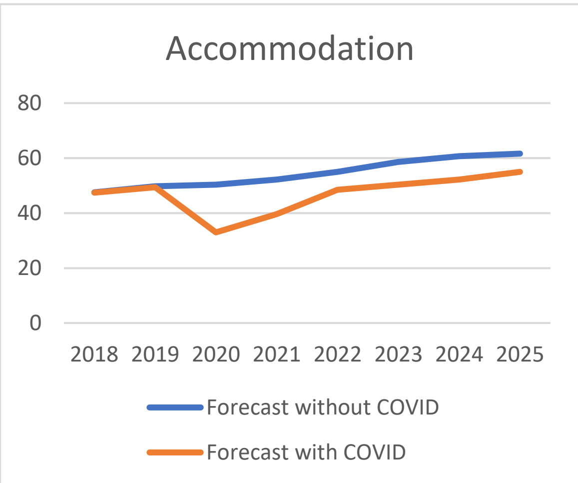
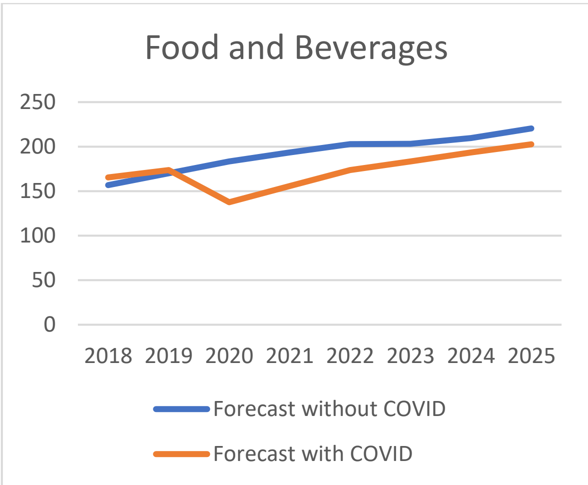
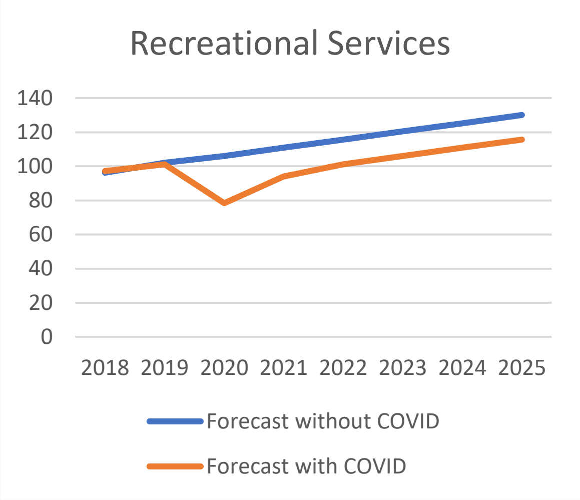


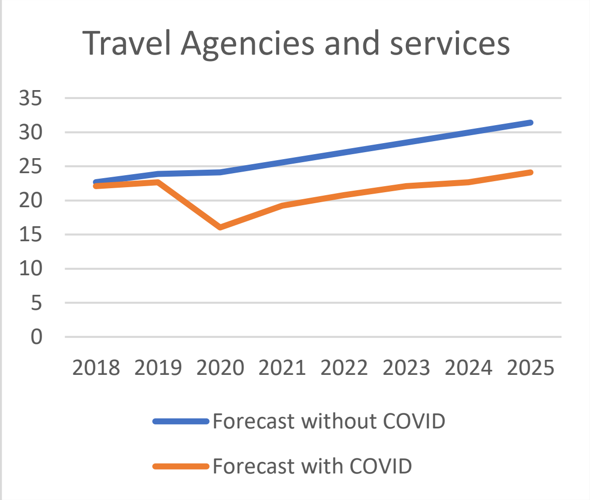
Figure 2.5: Recreational services forecast

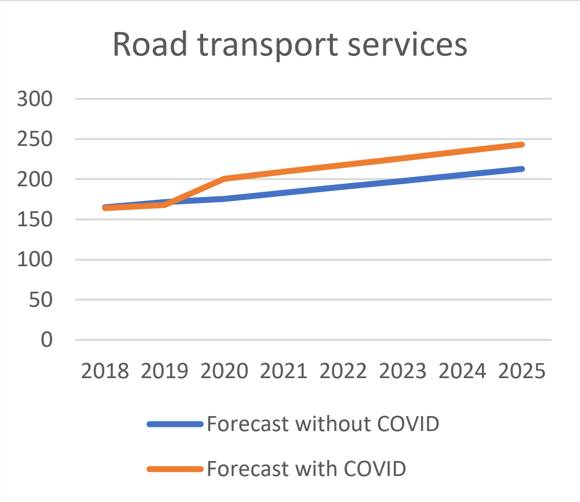
However, this does not take into account the effects of the pandemic, and with the 2020 numbers available, the forecasts are all adjusted on a judgemental basis to correct for the pandemic and its effects. To inform the recovery process, available data from Statistics South Africa for the years 2021 and 2022 were consulted and, based on the available data, the forecasts for economic performance (output) were adjusted as indicated in the graphs below.











It is evident that the, besides road transport, production in all the other tourism-related sub-sectors decreased dramatically due to the COVID-19 pandemic. The data up to 2022 also shows that recovery in many of the sub-sectors are slow, and hence full recovery to the baseline (pre-COVID) forecasts are not expected by 2025.

The economic performance (or output) forecasts of the various sectors are as follows:

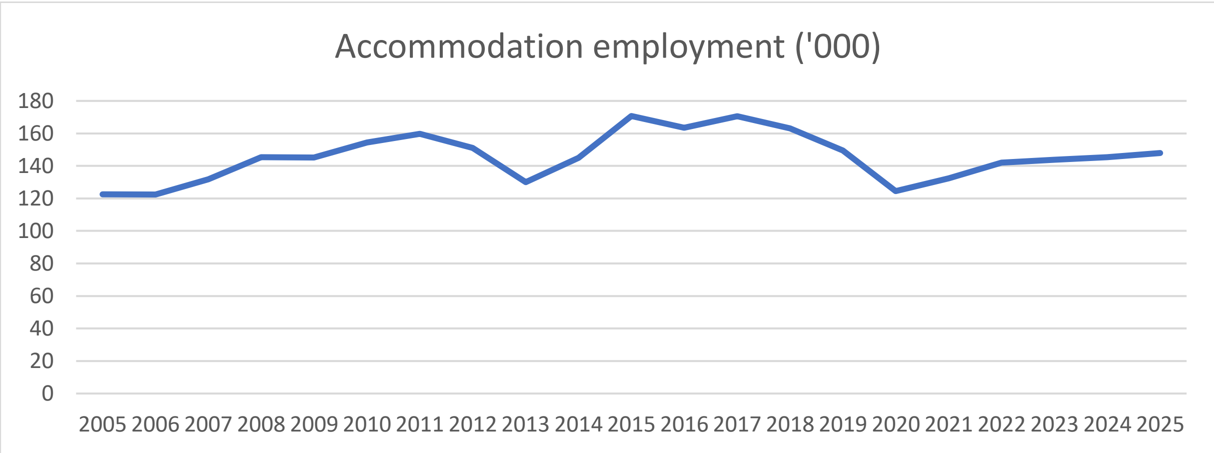
- Accommodation is expected to grow by 4% during 2023, with a slight decline in growth expected in 2024 before growing at 5.3% during 2025 again. The average 3-year growth is projected to be 4.3% per annum.
- The food and beverage sub-sector is forecasted to grow by 5.4% during 2023, 5.6% during 2024, declining to 4.7% in 2025. The average 3-year growth is expected to be 5.2% per annum.
- Sport and recreational services is forecasted to grow by an average of 4.5% per year over the next 3 years, with growth declining from 4.8% in 2023 to 4.3% by 2025.
- Travel services took a huge knock during COVID and the recovery is expected to pick up some speed during 2023, with a 6.5% growth in performance forecasted. The average growth in the

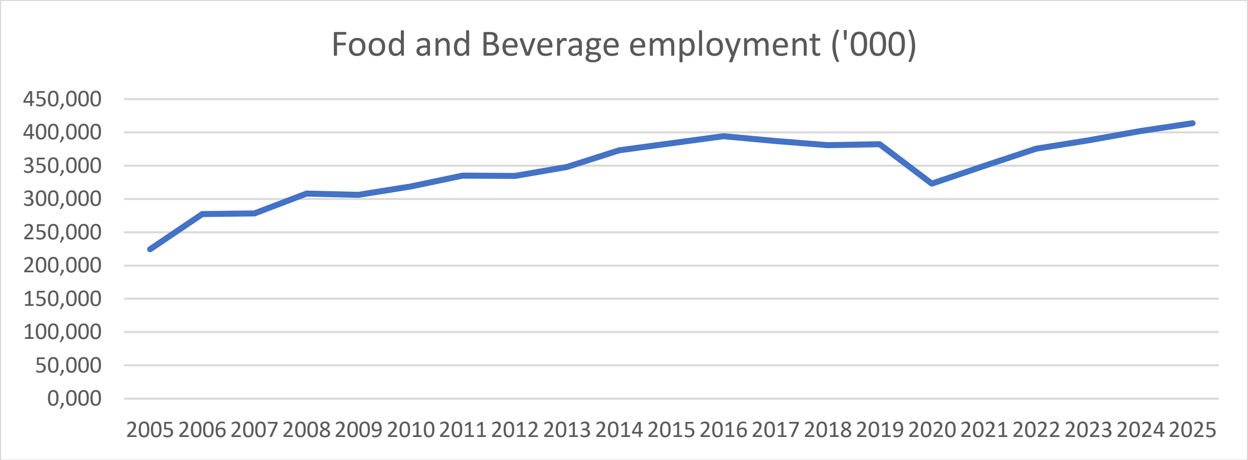
sector of the next 3 years is forecasted to be 5.1% per year, indicating lower growth rates for 2024 and 2025 compared to 2023.

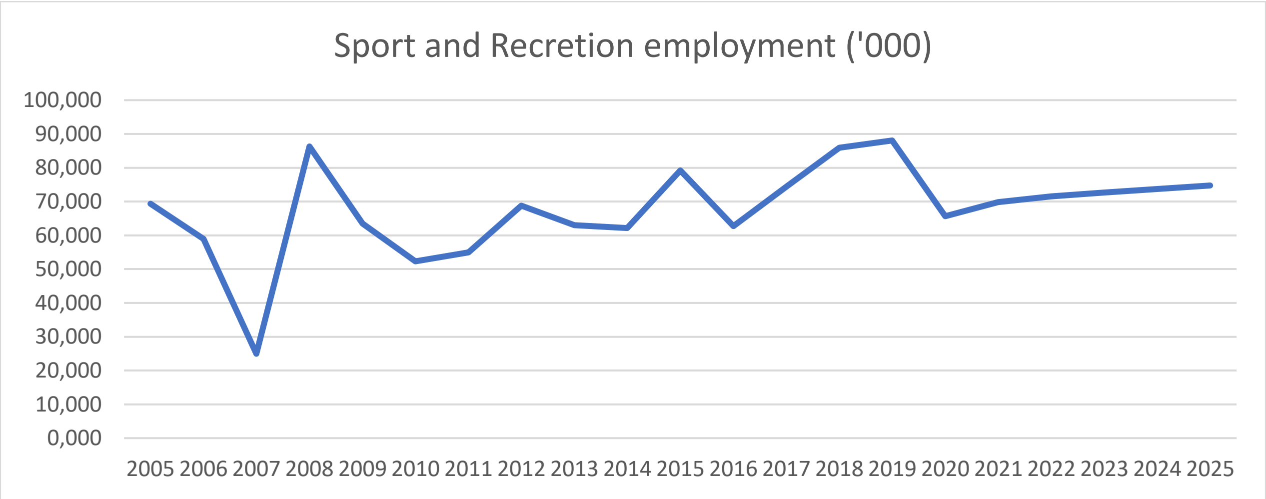
- The road transport sector has seen a positive growth during COVID, contrary to many of the other sub-sectors. Constant but slightly declining growth is expected with growth in the sector averaging at 3.8% per annum, with the highest growth rate of 3.9% expected during 2023.

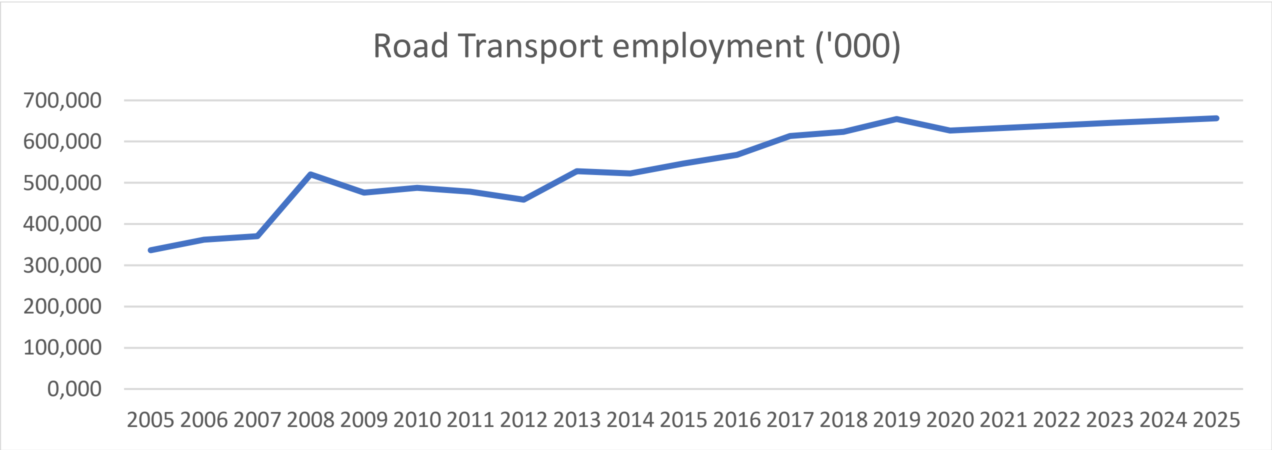
2.4 Labour demand in tourism-related sectors

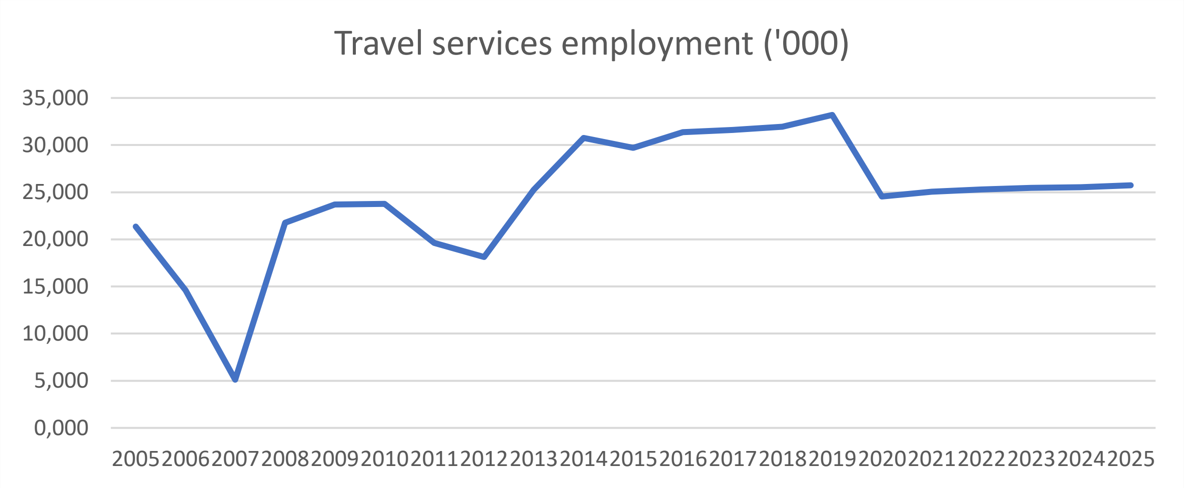
Given the elasticities derived, it is possible to link the workforce model with the forecasting model. The employment data contained in the Tourism Satellite Accounts, available up to 2020, are visually shown below, together with the forecasts generated for 2021 to 2025 for each sub-sector. It is evident that COVID-19 had a huge impact on employment in the sub-sectors that are more dependent on tourism, i.e. accommodation and travel services, compared to sectors less dependent on tourists (i.e. road transport). The slow recovery of the tourism industry also translates into a slow recovery in employment for the sub-sectors dependent on tourism. It is also clear that the negative effect of the lockdowns on the food and beverage subsector caused lay-offs during 2020, but once these restrictions were lifted, the sub-sector and subsequent employment picked up quickly.




Food and Beverage employment ('000)
450,000
400,000
350,000
300,000
250,000
200,000
150,000
100,000
50,000
0,000
2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025


Sport and Recretion employment ('000)
100,000
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0,000
2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025


Road Transport employment ('000)
700,000
600,000
500,000
400,000
300,000
200,000
100,000
0,000
2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025



The table below summarises the average annual growth in economic performance (as measured by output growth) expected for 2023 to 2025 as well as the increase in demand for labourers per sub-sector. While high growth rates of above 4% per annum are expected in most sub-sectors, the demand for labour increases by less than 2% on average per annum, except in the food and beverages sub-sector. This filters through to new labour demand due to the growth in demand for products and services within this industry. It is evident that almost 40 000 job opportunities are expected over the next 3 years in the Food and Beverage sub-sector, followed by road transport with 17 500 and accommodation, with 6 000 new opportunities over the same time period. This excludes replacement demand due to normal labour turnover, i.e. resignations and retirements.

Table 2.3: Average annual growth in economic performance

Sub-sector	Average annual output growth forecast (2023-2025)	Average annual labour demand forecast (2023-2025)	Total new labour demand (2023-2025)
Accommodation	4.3%	1.38%	5 942
Food & Beverages	5.2%	3.3%	38 425
Road Transport	3.8%	0.9%	17 450
Travel Agencies & similar	5.1%	0.6%	430
Sport & Recreational Services	4.5%	1.5%	3 166

Using the CATHSSETA Sector Skill Plan (2014) for 2014/15 to 2016/17 distribution of job opportunities within the different subsectors, one can derive the demand for labour of different categories over the next 3 years. The table below divides the new labour demand (shown above) into the various sub-categories. Note that accommodation and food and beverages are combined into hospitality in the table.

Table 2.4: New labour demand

	Hospitality	Sport & Recreation	Tourism Services
Managers	4 338	349	67
Professionals	693	131	30
Clerical support	3 332	336	152
Elementary occupations	11 975	282	33
Plat & Machine operators	447	106	30
Service and Sales workers	17 509	413	84
Skilled agri, forestry, fishing, craft traders	266	83	2
Technical and Associate professionals	5 808	1 465	31
Total	**44 367**	**3 166**	**429**

In the Hospitality subsector, the demand is especially for service and sales workers, followed by elementary occupations, technical and associate professionals and managers. In sport and recreation services, the demand for technical and associate professionals is significant, while clerical support workers as well as service and sales workers are the main categories of demand in the tourism services sub-sector.

SECTION 3: PROJECT DESIGN AND METHODOLOGY

3.1 Methodology overview

The project was designed and implemented as a 5-month project. The study was conducted as an Exploratory Mixed Method (EMM) research designed to generate both inductive (qualitative) and deductive (quantitative) data. The mixed-methods design provided a more structured approach to the study, whereby the qualitative phase of the study was implemented concurrently with the quantitative phase, with the built-in reflexibility to modify or refine the novel measuring instruments designed to generate the required data for the study. The concurrent EMM design two-phase mixed-method approach facilitated the empirical aspect of the study to establish both subjective (qualitative) and objective (quantitative) insights. The data requirements entailed the implementation of the research project in three distinct phases:

- Phase A – Qualitative desktop research (Secondary data)
- Phase B – Qualitative empirical study (Primary data)
- Phase C – Quantitative research study (Primary data)

The three phases allowed for the triangulation of the data generated by the research, whereby Phase A methodology was a desktop study exploring the literature on all the fundamental concepts of the respective research, including reports and recovery plans, secondary information related to current and future skill needs, any reports related to the different sub-sectors, all CATHSSETA strategy documents and CATHSSETA strategy. This phase provided to have an overall picture of the current status of the industry and facilitated the development of the measuring instruments for the empirical phases. Phase A also generated insights through interactions with key informants and CATHSSETA to refine and validate the measuring instruments for the research study. Based on Phase A, the research instruments were finalised. Phases B and C subsequently collected all the required data to address the objectives of the research study.

3.2 Study areas, populations, and final sample sizes

In line with the EMM approach, qualitative and quantitative sampling approaches were applied to select the participants for the empirical phases. The universal samples for the empirical phases were,

- Phase B - tourism industry practitioners, including key informants in tourism-oriented government and quasi-government organisations, tourism enterprises in the private and public sector, academics, employees, and CATHSSETA role players.
- Phase C - based on the CATHSSETA database provided; employers and employees in all three sub-

sectors. Participants formed part of the programmes of CATHSSETA and training and education institutions from the post-school Education and Training sector. Where additional respondents were needed, they were included via convenient sampling. Sampling within each of the primary data collection phases (B and C) of the research was as follows.

- **Phase B**

Non-probability sampling was applied to sample the key informants for this qualitative phase of the research within tourism-oriented government institutions, private tourism entities, industry associations, trade unions and academia. Purposive sampling was applied to sample individuals who would contribute critical insights into sector skills within their respective purviews. Interview participants were purposively recruited through existing industry databases, professional networks, professional digital platforms such as LinkedIn, and referrals through snowball sampling. The final sample sizes for Phase B are summarised in Table 3.1.

Table 3.1: Summary of Interviewee sample

	Conservation	Hospitality	Tourism & Travel Services
Academics	6	4	6
Government and Quasi-government	6	5	5
Employers	17	18	16
Employees	7	9	12

- **Phase C**

Non-probability sampling was also applied to sample employees and employers, or the quantitative online phase of the research study. The database of CATHSSETA was used to distribute the relevant questionnaires to the selected respondents online. This was done for each tourism sub-sector under study, in order to track the number of responses better. Convenience sampling was implemented to increase the sample of participants via in-person surveys. The online option for the completion of the questionnaires was initially preferred and implemented. All attempts were made to have an equitable representation across all the sub-sectors. As indicated, a fully online approach was initially implemented, followed by a supplemental strategy which necessitated physical data collection. The final sample sizes for Phase C are summarised in Table 3.2.

Table 3.2: Summary of Survey sample

	Conservation		Hospitality		Tourism & Travel Services	
	Employers	Employees	Employers	Employees	Employers	Employees
Sample Size	7	53	73	294	17	57

[Complete Responses]

3.3 Measuring instruments and data collection

New bespoke qualitative and quantitative measuring instruments were developed for the research study (Instruments as attached as Annexures).

Data were collected as follows:

- **Phases A**

Desktop research was conducted as part of an in-depth review of secondary data and reports on South Africa's tourism workforce and, where possible, for each sub-sector. The desktop research was conducted according to the criteria developed as part of the research process. Sources of the secondary data included, but were not limited to, the:

- Economic and Reconstruction and Recovery Plan
- Economic Recovery Skills Strategy
- CATHSSETA strategy documents
- International and national tourism labour-related reports
- Multiple United Nations agency reports including UNDP, UNCTAD, UNWTO
- Relevant reports from South African Tourism and the National Department of Tourism

More significantly, desktop research was conducted to review the literature to develop the respective questionnaire(s) for the study. Relevant studies were consulted to develop the measuring instruments based on validated instruments and where needed; new instrument items were developed.

- **Phase B**

Phase B was the empirical qualitative phase of the research study. Individual interviews were critical in the generation of insights based on the opinions of the employees, employers, government officials, and academics. Experienced qualitative researchers (as well as post-graduate students in training) conducted the interviews to maximise the research value associated with soliciting information and data from key informants. To acquire a standardised set of information while allowing for the generation of additional information, a set of pre-determined semi-structured questions was utilised in the form of a discussion guide. The semi-structured nature of the method ensured that the interviewer could further probe interviewees to elaborate on their responses. Interviews were audio recorded (with the consent of respondents) for transcription to allow for free-flowing conversations throughout the process.

- **Phase C**

Phase C was the quantitative phase of the research study, running over a period of three months. Surveys were conducted concurrently for employers and employees across the sub-sectors. The respective quantitative survey(s) utilised both open and close-ended self-administered questionnaires, with responses recorded primarily on 5-point Likert scales. The questionnaires were developed from the data generated by Phase A. To conduct the respective surveys, the appropriate persons at CATHSSETA were approached to seek permission to utilise their database to distribute the questionnaires to the relevant respondents' e-mail contact details. Due to the outdated nature of the database provided, as well as apparent respondent apathy, the fully online approach was supplemented with concurrent physical surveys.

3.4 Data analysis

Data generated from all phases of the proposed research will be analysed utilising various scientific methods. Profiling the employer and labour market of each sub-sector, assessing the economic performance of the three sub-sectors, as well as identifying skills trends and sector-specific developments are critical outputs of the research study. Qualitative and quantitative analyses provided more meaningful information from the data. To draw meaning from Phase B data, context, patterns, themes and propositions were utilised. For the qualitative data, content analysis (conventional, directed & summative) was applied and drew descriptive meaning from transcriptions of the interviews. A descriptive/narrative report was compiled. Phase C data was be analysed utilising the latest version of QuestionPro data analysis. Descriptive quantitative data analysis techniques were applied.

3.5 Ethical considerations

The research study was subjected to a scientific review and ethics process at the NWU and was conducted with the strictest ethical considerations under ethics number: N W U - 0 0 5 5 2 - 2 3 - A 4 The recommendations of the Belmont Report of 1979, as well as the research ethics code of North-West University, were applied for the duration of the research study. Ethical clearance was obtained from North-West University to ensure the integrity, quality, and validity of the data generated by the research. Ethical considerations included:

- The informed, voluntary consent of all participants in the research.
- The guaranteed confidentiality and anonymity of the respondents with no personal identification information being solicited as part of the research process. Consent was requested for recorded interviews and consultative panel activities.
- The insurance of non-discriminatory behaviour towards the respondents based on their gender, ethnicity, racial orientation, or religious or political beliefs.

Generally, the researchers in the project ensured the following,

- Express consent was solicited from the database Gate Keepers (CATHSSETA), the database administrator and service provider, to survey individuals on their database.
- The study did not target any vulnerable groups and targeted individuals older than the age 18 years old.
- A consent letter was provided to the respondents online and it included essential information for participation in the study, including the ethical clearance number.
- The researchers stored the data in the appropriate data repositories of the research unit at North-West University. The online survey and interview data are held in a password-protected Google account to be set up expressly for the study.
- The data remains the property of CATHSSETA (as funder and commissioner of the research study) and the North-West University (as the service provider). The data will be accessible to the researcher and North-West University. The data will also be kept safe on TREES' secure server. Only those who are working on this project have access to the data.

Additional ethical considerations applicable to the online interviews and surveys:

- In the case that respondents were unfamiliar with computer-based methods, the procedures that were used to track the responses and preserve their confidentiality were clearly explained.
- To avoid respondents accidentally skipping a question, the online survey required participants to answer every question before the form can be submitted or go to the next page. While respondents were required to answer each question, a response option for each item that allowed the respondent to skip the item was included.
- On each online questionnaire page, an option that allowed the respondent to withdraw from the survey was included. If the respondent chose this option, all responses from that subject were

discarded.

- Some respondents may have been concerned that their answers to the online survey could be traced back to them via their e-mail address, IP address, or other information captured in the study. Respondents were reassured that no attempt would be made to capture the information they do not voluntarily provide.
- Online interviews were recorded with the respondents' consent, and the video cameras were switched off to ensure full anonymity.
- The researcher requested no e-mail addresses, and the service provider was asked to inform respondents of the study and invite them to participate electronically, such that a respondent's specific responses could not be linked back to their e-mail address.

3.6 Beneficiaries

The direct beneficiaries of the research study are CATHSSETA, as the anticipated outcomes of the study will aid South Africa's tourism policy formulation and skills-development strategies, as well as sector resilience in the face of crises. CATHSSETA, as a direct beneficiary of the study, will benefit from improved resilience within the South African labour market involved in the tourism industry through the development of reflexive sector skills plans. The indirect beneficiaries of the intended study include the consortium. The proposed study presents an opportunity for all parties involved to share expertise and develop the most appropriate models for the South African scenario. The involvement of post-graduate students builds capacity and equips these students with the skills necessary to take the tourism industry forward. It is anticipated that the research study funding will facilitate surveys for which honours and master's students may be trained and deployed as fieldworkers/interviewers in future projects.

3.7 Challenges and limitations

As can be expected with any research process, the study experienced some anticipated and unanticipated challenges and limitations:

- The CATHSSETA database on which our projected quantitative research survey sample sizes were based turned out to be outdated and of limited use to the researchers. The online survey approach had limited success due to outdated e-mail and telephone contact details for potential participants. However, a supplemental face-to-face approach was implemented to boost response statistics in each sub-sector.
- The timeline of the project was a constraint. NWU was commissioned to conduct the study in 5 months for completion by March 2023. In future, it is recommended that CATHSSETA consider

running a project of such magnitude over 1 year to allow researchers to execute the project without the pressure of short turnaround times.

SECTION 4: HOSPITALITY SUB-SECTOR REPORT

4.1 LITERATURE OVERVIEW: HOSPITALITY SUB-SECTOR

The following section address secondary information related to the hospitality sub-sector.

4.1.1 International and national coverage

Generally, a mismatch of the hospitality labour and consumer market needs, and formal skills development exists throughout the globe (Nhuta, Makuyana, Makoni & Chauke, 2015; Ra, Chin, & Liu, 2015). Such is a consequence of the characteristic of the sector to be labour intensive while recognizing and preferring in-house training to formal certified training (Nhuta et al.,2015). Within this disjoint, the hospitality research community in Africa agrees with the industry-role players and national skills reports that there is a paucity of critical skills, regardless of growth in skills development aimed at preparing workforce (learners) for jobs/occupations in the sector (Asirifi, Doku, Morrison, & Sackey, 2013; Emmanuel, 2020). The above-mentioned situation nurtures disparities that create conducive environment for employees to be vulnerable to all forms of work and workplace instabilities (Makuyana, 2014).

In the same standview, of mismatch in skills development and occupational-based career growth Olowoyo, Ramaila, and Mavuru (2021) and Duncan, Scott, and Baum (2013), observed that it is an everyday reality that the hospitality sub-sector is plagued with low wages, unfriendly long hours, unacceptable shift patterns, unequal opportunities, females always complaining about low wages when compared with their male colleagues, poor or no clearly defined career paths, improper recruitment practices, high levels of labour turnover, quiet presence of trade unions and difficulties in sourcing, recruitment (getting) and retain quality employees. One can say, it remains a problem for the industry to have a shortage of qualified personnel because formal qualification is neither acknowledged nor do role players provide genuine role-size-based labour demand for supply to address it from a systematic complementary input-output relationship between skills development and hospitality businesses (Makuyana, 2014; Nhuta et al., 2015).

Scholars like Airey (2015), Airey, Dredge, and Gross (2014), Morrison and O'Gorman (2008); Makuyana (2014), and industry role players' reports have a similar narrative that reflects the reluctancy to collaborate in alleviating the mismatches of skills development and hospitality jobs, regardless of geographical location. Research shows a trend throughout the globe to associate hospitality jobs with a transient workforce, a perceived and actual lack of formal qualifications for the majority of occupational levels, a high female ratio, limited involvement, and participation of minority groups like disabled people, and dominance of part-time and casual workers (Huang & Baker, 2021). Such nurtures a widely entrenched mindset that hospitality employment primarily consists of low-skilled jobs, negative lifestyle issues, and social stigma associated with working in this industry (Rai, Bisht, & Singh, 2021). Globally, it is observable that there is a lack of will and buy-in to collaborate among investors, industry role players, and trainers towards the joint development of a skilled, enthusiastic, and committed workforce for sustainable and resilient hospitality businesses (Baum, 2003; 2008; Kusluvan, 2003; Kusluvan & Kusluvan, 2000; Kusluvan, Kusluvan, Ilhan, & Buyruk, 2010).

From a South African context, Olowoyo et al. (2021) presented a transition within the hospitality sub-sector skills development since 1994, with a particular interest in food and beverage and the hotel industries. Of interest, Olowoyo et al. (2021) concur with the CATHSSETA SSP (2020/21-2024/25) that 90% of the hospitality industry is composed of small, micro, and medium enterprises who have employed less than ten people. At the same time, restaurants offer 7,6% (45 000 jobs) of the total employment percentage of the hospitality sub-sector in South Africa (the Republic of South Africa, Department of Tourism report, 2019). It is still being determined if the employees have formal hospitality qualifications, but Olowoyo et al. (2021) believe skilled workers can uphold the effective growth of the sector. Despite the strides by CATHSSETA to consider rural villages, towns, and small dorpies, in their coordinated training packages, concern remains on the meaningful impact and effectiveness of skills development (Nomnga, 2021; Parliamentary Monitoring Committee, 2020/2021 first quarter report; Toerien, 2020). The Parliamentary Monitoring Committee 2020/2021 first quarter report reflects that hospitality-Technical Vocational Education and Training colleges do not provide programs that prepare the qualification holders for work as they are not equipped with industry-required skill sets, even before the COVID-19 pandemic. Such concurred with Makuyana and Saayman (2018), who, like in the report, strongly recommended work-integrated learning as strategic mechanism to bridge classroom-based learning and occupational work-based competencies. The information mentioned above referred to the work-integrated learning as a Work Readiness Program that would cover aspects like Induction, Workplace Basics, Workplace Skills, People Skills, Customer Service, Finding your first job, Self-development, Business Principles, and Business acumen (simulation) (Parliamentary Monitoring Committee, 2020/2021 first quarter report).

Non-Afrocentric academic debates indicate the mismatch as stemming from the background and how hospitality training and education emerged as a brainchild of geographers and historians, who developed curriculum while undermining the industry-role players (Alexander, 2007; Airey & Tribe, 2010; Lashley, 2015; Zopiatis, & Constanti, 2007). The mindset was nurtured in hotel/hospitality schools that enabled a superior attitude among trainers/educators who kept training the workforce for the industry while they didn't have experiential work-based exposure in their career development; such is also evident in the African context (Makuyana, 2014). Subsequently, the industry-role players' mindset shifted towards training their workforce, using their business frameworks and tailored organizational standards as evidenced by hotel chain groups with hospitality/hotel schools and awarding industry-certified qualifications (Makuyana, 2014; Nhuta et al., 2015). On the one hand, it perpetuated a negative attitude among industry-role players towards academic (university) and TVET curriculum development and teaching and learning approaches (Makuyana, 2014; Parliamentary Monitoring Committee, 2020/2021 first quarter report). On the other hand, academic qualification holders who entered the industry attempted to bridge the gap without nullifying the role of academic (university) programs by introducing a transitional program that neither guaranteed employment nor certified the acquired competencies after calling it the Graduate Management Trainee program (Makuyana, 2014; Nhuta et al., 2015). Therefore, it is observable that scholarly and industry debates uphold a limited knowledge of reality-based contextualised non-academic career paths, except for Culinary Arts-Chefs (Makuyana, 2014; Parliamentary Monitoring Committee, 2020/2021 first quarter report). This implies that, on the one hand, industry and communities struggle to erase the perceived image associated with hospitality training and education as a non-job-centred qualification.

On the other hand, the same stakeholders believe one does not need a formal qualification and skills to enter the sector. Unfortunately, Parliamentary Monitoring Committee, 2020/2021 first quarter report strongly believes that hospitality programs are designed for learners without the capacity to take perceived more vital subjects like Sciences, Technology, Mathematics, and Engineering subjects, especially those with limited options after high school. Such poses a question on the ability of hospitality skills development to address emerging trends within the hospitality sub-sector in South Africa and beyond, especially in the post-COVID-19 pandemic because the health crisis brought a lot of changes in business operations and management. It is unclear how the changes might have compromised the 'human touch' that hospitality sub-sector takes pride in within their offerings.

4.1.2 Emerging trends, occupational patterns, and hospitality skills

Worldwide Hospitality and Tourism Themes (2016) documented emerging trends in the profile of current and future tourists towards wanting and expecting accurate information to guide their choices, quality experiences, experimentation, willingness to undertake active holidays with diverse and unique hospitality products, and senior citizens (ageing with time, financial resources to spend) and millennials who composes the +90% of the global statistics on guests. Nonetheless, the latter are considered digital natives, who look for authentic experiences and see themselves as travellers rather than tourists. There is also a significant difference between the needs of millennials and baby boomers as they plan to travel (Salazar, 2018). This implies the need for the research community to co-create knowledge and research initiatives to advise and enable the hospitality industry to promote and drive economic growth using the strategic collaboration that will allow inclusive skills development among the workforce and environmental sustainability. Salazar (2018) identified technology as having a big impact on how the hospitality industry is changing. For example, new trends include creating tech-savvy rooms that sometimes also include Artificial intelligence for a personalized effect and using chatbots for better online customer experiences. Cohen and Olsen (2013) agree that technological resources add to the hospitality sub-sector’s competitive performance.

Sakamoto and Sung (2018) and Wineaster (2015) documented the occupational pattern of deficits in human resource skills in accommodation and food and beverage sectors - cooks, chefs, reservation staff, food and beverage managers, and waiters/waitress. Added to the above, there are emerging technical fields such as hospitality architecture, business concept design, safety, and hygiene standards; hospitality-related technology, communication – multi-lingual and interpersonal skills (good organisational, speaking, and public relations skills); customer care; marketing and sales skills; innovation and creativity skills; leadership and managerial skills. This implies that the empirical study that would inform a future skills strategy needs to address “what skills” and “who gets access to training” and whether and how these skills impact better employment and business outcomes. Especially with the advent of the COVID-19 pandemic and the aftermath of lockdowns that exposed the hospitality sub-sector of South Africa which is already facing skills-related challenges and had made calls for innovative ways of managing the guest experience as means to differentiate the enterprises. At the same time, the government and industry share common objectives and responsibilities to nurture responsible, inclusive, and green hospitality guests. Such contexts present new opportunities that emerge from travelling as a global activity that fosters the growing importance of women, children, and disabled people within the growth of hospitality. In addition, a need to profile the ‘new’ guest, their behaviour, and emerging needs, and such calls for the co-creation of knowledge about segments by the research community in collaboration with educators/trainers and industry for the generation of meaningful insights for management and marketing strategies that can optimise skills development among the workforces.

Sakamoto and Sung (2018) raised concern that discussions and debates should also focus on hospitality skills policy, for it to cover aspects that indicates how to supply skills; at the same time pursuing to understand how the world of work operates as influenced by man-made and natural changes. These said discussions and debates should consider what generates the demand for skills in

the first place and employability of the skills to be designed and developed. Within the same lens of investigating future skills, it is vital to question how and the forms of mechanism that will nurture and make the future demand for skills present opportunities to promote the inclusive policy agenda.
On the one hand, hospitality is not an exception as the fourth industrial revolution (technological advancement) is influencing the need for new occupation-based skills for the work environment (job-roles) and businesses processes. On the other hand, such implies that HR practitioners in the sub-sector need to realign for the transition to a circular green economy work flexibility and remote work duties (hybrid working environment). Having a clear picture of the extent and ways, skills and TVET and university education provisions make appropriate responses to this challenge can enable an assessment of demand and supply for skills are in the right standing with occupational/job quality and the working conditions that influence the extent of utilisation of skills and the impact on how skills can help in co-creating better employment and business outcomes, while subsequently contributing towards building an inclusive society from a skills policy and practice perspective. Blue and Harun (2003) investigated the need for a professional hospitality language and the skills related to it. While this is not a stardardised skillset, HR managers should invest in the receptionist-guest exchange and the language associated with it. This includes cross-cultural communication and the use of foreign languages.

The raised concern applies to South Africa, too, as the hospitality industry jobs now demand formal and higher levels of education and training instead of acquiring skills informally while being on the job only. In lower-middle-income countries, the level of education of the workforce remains low, and a considerable proportion of jobs are held by persons who do not have the skills and education deemed necessary for the job (ILO, 2014). It is observable that there is a rising demand for STEM skills, emotional intelligence, learnability and adaptability, and green skills for the hospitality sub-sector worldwide and South Africa is not an exception. In all the envisioned occupational changes, inequality and poor employment prospects among disadvantaged groups have hardly improved (ILO, 2018c). Hence, the need to question the role that skills development (supply) and the jobs that demand the skills have in bringing about an inclusive society (ILO, 2016). Hence a call for a skills policy that can guide collaborations between the research community, educators/trainers and industry towards establishing skills for the future growth of the sub-sector.

South African hospitality sub-sector still has personnel with formal tertiary qualifications who either do not stay for long-time in the industry or may, at times decide not to work in the industry due to work and workplace’s lack of decency and wellness. Such makes the sector to have high staff turnover, wastage of invested resources in skills development, and a lack of retaining trained and experienced personnel (Nyathela-Sunday et al., 2022). Due to the desire maximize human capital exposed to them, there is a trend among the industry-key role players to fill up with diverse groups of individuals with different qualifications and cultures, resulting in an economic contribution from the high population of migrant labour (whether temporary or permanent) (OECD/ILO, 2018; Mara, Govender & Makka, 2021). The results are that the sector is littered with low-paying job opportunities (Nyathela-Sunday et al., 2022). The question emerges, 'how skills and knowledge development can be positioned from policy to practices addressing future quality of occupational and competencies demand and supply?' (Hospitality outlook, 2014; Nyathela-Sunday et al., 2022). This implies for CATHSSETA to consider short-term and long-term competencies in line with learnability and adaptability. Within this stand view, it is vital for CATHSSETA to begin to incorporate the view of the UNWTO (2020) report that accessible tourism is a game changer that would need skills and knowledge beyond in-house training for the access-need market segments. Accessible tourism considers the hospitality sub-sector to be inclusive of all people including ageing, people with disabilities, and pregnant because people are acquiring impairments from different causes such as incidents, accidents, medical/health conditions and those who acquired impairments at or during birth. Therefore, CATHSSETA should plan workforce/skills development while considering inclusion at workplace and destinations.

Of late, a need to incorporate disabled youth and women in rural and urban emerged as a platform to co-create inclusion and accessibility from a systemic lens to address inclusion in hospitality-sector skills development and labour and consumer markets (Agyei-Quartey, 2020; ILO, 2006; ILO, 2013; see also Figure 1). Nomnga (2017) encourages woman to take part in training and embrace education, especially in technology as it is part of the globalised hospitality environment. According to ILO (2010), and WTO and ILO (2013), there is a change towards going green which has influenced guests towards preferring veganism, vegetarianism, and being conscious of the carbon footprint, among other hospitality-related contributions towards impacting climatic changes, risk, health, and safety issues in hospitality establishments, day travel for business, meetings and outdoor recreation and leisure and usage of artificial intelligence in the sector (Mordor Intelligence, 2020). Within such context, CATHSSETA can learn from the six analytic stages for ILO-Skills for Trade and Economic Diversification (Figure 4.1) to engage the industry continuously, analyse and model the demand and supply by occupational categories. accordingly

STAGE 1 /
Sector Position and Outlook

The first stage of STED is to analyze a sector's current position and outlook as well as external factors that are likely to affect its progress in the future. The results are discussed with stakeholders in order to develop an ambitious but realistic growth scenario for the medium term, based on the following questions:

- Business as usual: What would be a realistic growth trajectory based on existing products and existing markets?
- More of the same: How can export growth for existing products be stepped up, and what would be a realistic target?
- Upgrade: Is there room to develop new products, access new markets, improve quality and branding, increase value addition, etc.?

STAGE 2 /
Business Capability Implications

The second stage identifies gaps between the business capabilities that firms in the sector have now and the business capabilities they will need in order to achieve the outcomes envisaged in the growth scenario from Stage 1. For example:

- What capabilities will firms need in order to develop new products in line with regulations and consumer tastes in foreign markets?
- What will they need to be able to do in areas such as logistics, sales, marketing and channel management in order to develop new export markets?
- What will a business in the sector have to be able to do better in its operations in order to become more competitive on cost and quality?

STAGE 3 /
What Type of Skills?

Improving business capabilities is not just about skills. It is also about technologies, processes, strategies, financing, business culture and other factors within and outside a firm. However, any capability improvement will also have significant implications for skill demand. These are analyzed in Stage 3. The results point to the types of skills that will be important to deliver the medium term growth scenario. In addition, Stage 3 also identifies existing gaps in skills in all areas of relevance to firms (Box 2).

STAGE 4 /
How Many Workers by Skill Type?

Companies hire workers, not skill-sets. In order to develop useful policy recommendations, anticipated developments in skills requirements are translated into demand for workers based on the sector's current occupational structure and the expected demand for new skills. The result is a picture of expected demand for workers by each relevant skill type.

Subject to data availability, this stage can include quantitative modelling that delivers indicative numbers for labour demand by detailed occupational categories (Box 3).

STAGE 5 /
Skill Supply Gaps

Stage 5 matches the results from the previous stage with an assessment of the skills currently provided by the education system, on-the-job training, migration, etc. The purpose is to identify gaps between skill supply and demand now and in the future.

The analysis also covers the institutional set-up of the education system and available mechanisms for skills anticipation in order to identify potential institutional causes for skills mismatch.

STAGE 6 /
Proposed Responses

The results of STED are concrete recommendations at the policy, institutional, and enterprise level. Policy recommendations typically cover the development of specific curricula or training programs, labour market policies that improve job matching, as well as the overall incentive system (taxes, subsidies, etc.) for innovation and skill formation. Policy recommendations also cover ways to enhance coherence between trade, investment, development, and skills policies.

At the institutional level, recommendations may suggest ways to enhance the relevance of training and educational institutions for the sector's needs, for example by improving dialogue with employers. In addition, the creation or improvement of permanent institutional arrangements for skills anticipation might be recommended.

At the enterprise level, critical factors for skills development, such as in-house training, labour turnover, and mechanisms for social dialogue on training needs and delivery, are considered and improvements are recommended where necessary.

BOX 2: Firm Level Analysis

Analysis of business capabilities (Stage 2) and types of skills needed (Stage 3) in STED takes account of all areas of activity within a firm.

Figure 4.1: ILO-Skills for Trade and Economic Diversification

4.1.3 Key role players

The hospitality sub-sector comprises a web of interconnected (main-role players) stakeholders whose needs and desires are essential to yield optimal results. These are presented in Figure 4.2. According to Figure 4.2, the role players contribute to the hospitality sub-sector's success in different but complementary ways. The guests/travelers are the consumers of the co-created hospitality services and products. At the same time, the suppliers constitute the supply network of resources that are utilised as input into the hospitality system. The employees are the human capital that coordinates, co-creates and manages the experiences and interactions of the stakeholders within the hospitality system. In this context, management and professional associations like the Chefs Association has been incorporated into the employee category. Investors/shareholders/entrepreneurs are the individuals or groups who identify an idea or invent/conceptualise it, innovate, and enable creativity through funding the hospitality business programs, activities, implementation plans, and operations through a formal hospitality organisation that takes into account and creates value for all stakeholders.

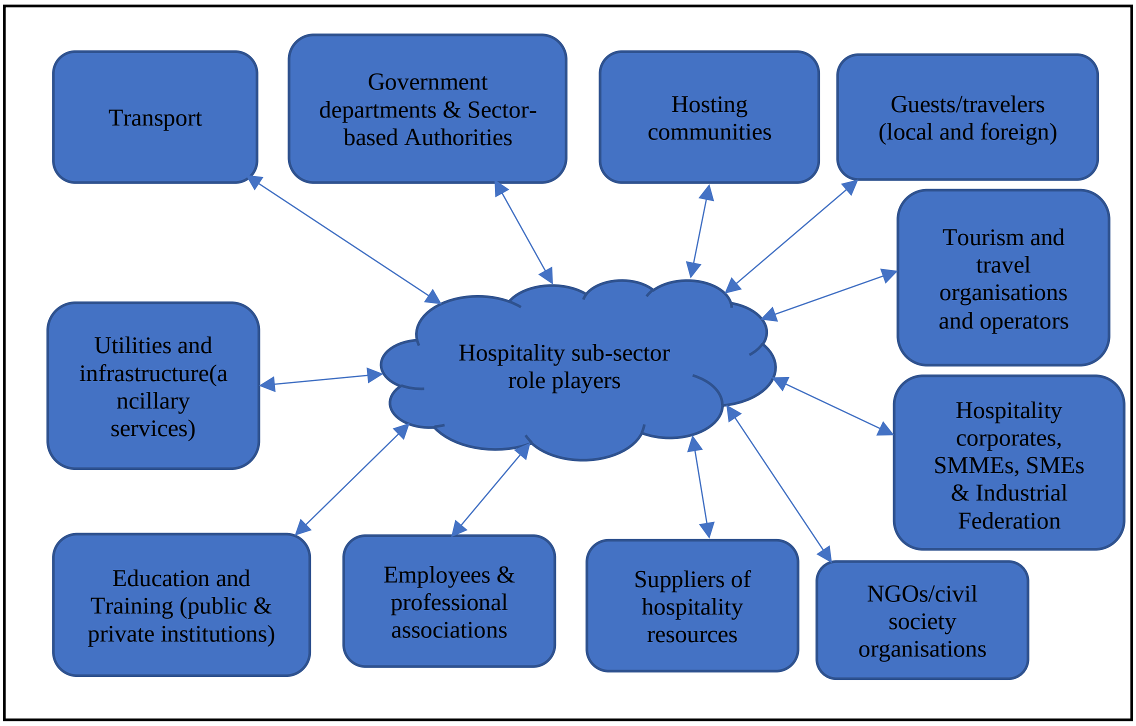


Figure 4.2: Role players in the hospitality sub-sector

The hosting communities entail the local indigenous and non-indigenous various population groups who are located in places where the hospitality operational activities are hosted or occur. The hospitality industry is composed of corporates, small and medium enterprises that to a larger extent are influenced by the employer stakeholder, namely the Federated Hospitality Association of Southern Africa. The Civil society/Non-profit organisations in most cases are pressure groups to further a socio-economic-related cause that the hospitality sub-sector would be contributing to either directly or indirectly, such as the South African Disability Alliance that advocates for universal design and accessibility and have a representative seat in the Department of Tourism-Transformation Committee. Public and private education and training providers are responsible for equipping and preparing the human capital with knowledge and skills to serve all the needs of the stakeholders within the hospitality system.

The role of government departments, public institutions, and other governmental regulatory institutions is centred on policy formulation, strategic planning and creating an environment that enables the implementation and regulated sustainable hospitality growth. Such is set at national, provincial, and district/local community levels. On the one hand, government departments like the DHET, and sector-education and training authorities like CATHSSETA play a regulatory role both for industrial sustainable growth through systematic coordination and planning the process and making decisions for the future preparation, involved in implementing decisions and monitoring the outcomes in the sector-based skills development. On the other hand, the Department of Tourism plays an oversight role through a set of rules, regulations, guidelines, directives, and development/promotion objectives and strategies that provide a framework within which the collective, as well as individual decisions directly affecting long-term tourism development and the daily activities within a destination, are taken.

Added to the above, other role-players which are found in the categories mentioned above like other government departments, are explained in detail in Figure 4.3 and 4.4.

Department	Role	Role in CATHSSETA & NSDP outcomes
• Department of Higher Education and Training, Department of Sports, Arts and Culture • Department of Tourism • Department of Environment, Forestry and Fisheries • Department of Employment and Labour • The Department of Trade and Industry	• Higher education and training, skills development • Policy and regulation within the sports, arts and culture sectors • Policy and regulation, which is, among others, a national tourism sector strategy • Policy and regulation • Policy and regulation • Policy and regulation, the custodian of the Industrial Policy Action Plan (IPAP)	• Skills development policy and regulation, planning for higher education and training, Co-operation and resources; research development and support; and socio-economic innovation • Contributes to the SETA administration fee; National Cultural Industries Skills Academy, NaCISA, is a special-purpose vehicle of the department to support the Mzansi Golden Economy (MGE) strategy through skills development. The National Sports and Recreation Plan (NSRP 2030) advocates for accredited education and training programmes • Contributes to the SETA administration fee; and through the National Tourism Sector Strategy (NTSS) advocates for tourism human development strategy • Instrumental in driving the environment sector skills plan since 2010. • Through sectoral determination and all labour matters in the SETA workplace • Trade policy regulation and industry development, responsible for the gaming sector

Figure 4.3: Detailed government departments that are important for the Hospitality sub-sector

Source: Adopted from CATHSSETA 2020/21-2024/25 SSP

Public entity	Role	Role in CATHSSETA & NSDP outcomes
• National Skills Authority	• Provides oversight	• Monitoring and accountability
• National Skills Fund	• Funding responsibility	• Funding support to the sector
• South African Qualification's Authority	• Registers and maintains standards for qualifications	• CATHSSETA registered qualifications
• Quality Council for Trades and Occupations	• SETA qualifications authority	• Occupational qualifications; accreditation of skills development providers
• Sector Education and Training Authorities	• Facilitation of Skills development and funding	• SETA partnerships, cross-SETA MOAs for qualifications and accreditation

Figure 4.4: Public entities that operate within the Hospitality sub-sector

Source: Adopted from CATHSSETA 2020/21-2024/25 SSP

- **The role of CET, TVETs and universities in the Hospitality sub-sectors**

The DHET established nine Community Education and Training (CET) colleges in 2015 and fifty TVET which have three hundred and sixty-four campuses around the country. Of note, there are twenty-six public universities in South Africa, and of the twenty-six, only eight offer hospitality-centred degree programs.

Table 4.1: The role of CET, TVETs and universities in the Hospitality sub-sectors

CET		TVET		University		Complementary linkages within hospitality sub-sectors
Role	**Focus**	**Role**	**Focus**	**Role**	**Focus**	
Provides SETA-accredited occupational skills	Certificate, learnerships, and workplace-based training	Provide technical, vocational and occupational skills and workplace-based training	Certificates and diplomas, learnerships	Provide higher education and training	Management oriented degrees	Offer training services based on National Qualification Framework

- **The role of employer interest groups and labour unions in the Hospitality sub-sector**

In South Africa, there are a number of active employer interest groups, however, in the hospitality sub-sector, the Federated Association of Hospitality in Southern Africa (FEDHSA) and the National Employment Council for the sector stands to protect employers' interests by regulating and guiding professional standards and training as an industry representative and partner in the sector. In addition to employer interest groups, labour unions have been formed to lobby employees' interests in labour matters in commercial operations in hospitality like catering. These include the South African Commercial Catering and Allied Workers Union; the Hospitality Industries and Allied Workers Union, and the Hotel, Liquor, Catering, Commercial and Allied Workers Union of South Africa which has a representative in the CATHSSETA board.

- **The role of the role players in relation to the NSDP**

The role players contribute to the pursuit of the National Strategic Development Plan (NSDP) in different ways, but such enhance a complementary effect towards the attainment of the goals. In this sense, government departments establish regulate, govern, oversee the implementation, and monitor and evaluate the plans, while employers invest and operate hospitality operations that contribute to socio-economic growth and development. The employees and communities provide labour and services that enable the co-creation of hospitality experiences in exchange for a monetary/monetary equivalent value to sustain their household livelihoods. The public institutions including training and education, provide skills to enable sustainable and resilient human capital to keep serving the needs of the stakeholders in the sector.

4.1.4 Economic performance

Generally, high-quality skills development is subjective to a number of interacting variables that implicate the co-creation of the conducive circular socio-economic environment in context of effects of the economic-policy outlook. The high-quality skills development supports the development of workforce while incorporating variables that include the people, the state of technology, the legal, the economy, the environment, and the political context. However, it is important to note that the hospitality sub-sector plays a role in the global tourism economy. From a local perspective, the Hospitality sub-sector in statistics centred towards GDP is presented as amalgamated to 1.4% (StatsSA, 2019) before the COVID-pandemic and lockdown that induced travel bans and retrenchment/job losses as hospitality enterprises closed business. However, when compared with the rest of the South African economy, Figure 4, illustrates that trade, catering and accommodation (hospitality) as ranked 3rd.

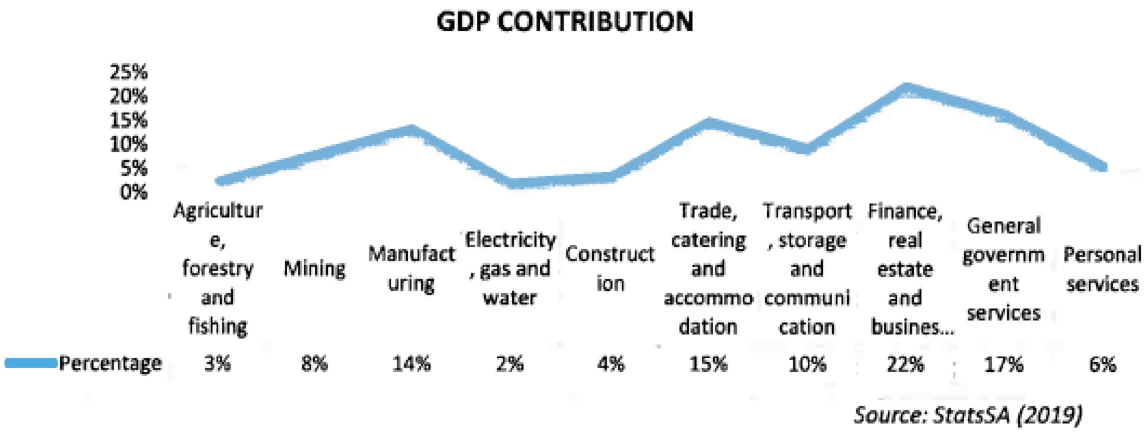


Figure 4.5: The contribution of hospitality to the overall South African economy

Source: CATHSSETA 2020/21-2024/25 SSP

Figure 4.5 shows a significant growth. Currently, the growth was disrupted by the effects of the COVID-19 pandemic and subsequent lockdown measures that brought travel restrictions and even bans from major South African international tourism markets. At the same time, the industry and even the citizens were not yet prepared and ready to sustain domestic travel for hospitality experiences. Before the COVID-19 pandemic, that is 2019, the South African tourism industry was composed of SMMEs which had 40% (+900 000) hospitality-centred enterprises (Small Enterprise Development Agency, 2019). On one hand, such comes with advantages in agility, and speed to respond to changes in the marketplace. However, on the other hand, such enterprises hardly co-create a conducive environment for an employee-centred career path as well as a lower appreciation of formal hospitality qualification that is supported by monetary and non-monetary compensation in trading time, and skills among other human capital aspects. Hence a need to explore the contribution of SMMEs from a skills development lens, which may encroach on both needs-based and conventional entrepreneurship. Currently, the hospitality sub-sector is recovering, by guest local guests are patronizing the establishments like restaurants. However, objective evaluation has not yet been comprehensive enough as a number of enterprises are still in the recovery process.

4.1.5 The outlook for the hospitality sub-sector

The outlook reflects hospitality as going through recovery, however, the discussion above brought to attention that countries where South Africa has no visa requirements like China are still calling for a reduction in travel. A culture of sharing at hospitality establishments is shifting, implying a shift towards enhancing guests’ experiences while upholding health, safety, and hygiene issues while following strictly following HACCP guidelines. Such is part of the emerging trends that hospitality organisations need to take into account, including managing customer perception, especially with the internet of things and information accessibility through social media and the internet to create a 'safe' image. Such has influenced or been influenced by a shift in consumer behaviours and consumption patterns among guests. Guests, especially seniors expect clearly communicated partnerships with medical service providers and travel insurance. In addition, accessibility issues are becoming critical as most ageing population groups (which share similar needs with disabled people) have time and resources (finance included) to travel and have longer stays, group travel and are classified under greater spenders per capital as compared to the younger generation market (Makuyana & du Plessis, 2020). Due to the COVID-19 effect, professional businesspeople are extending or mixing their stay with leisure including friends, family, and relatives, while working remotely. People are willing to pay more to stay at a nicer resort or hotel offering curated experiences and exceptional amenities. A stronger sense of community has been developed in the hospitality sub-sector and hotel conversions have been an important driver of growth across the globe, with leading hotel groups launching new brands and rebranding to widen and diversify their offering. The pandemic has also accelerated the attention on sustainability and responsible business in the hospitality industry to the extent of being willing to share their plans to offset their carbon footprint, in line with global governmental efforts, and drive best practices on responsible consumption on a hotel group level. There is improvement in hospitality sub-sector after the pandemic as indicated in Figure 4.6.

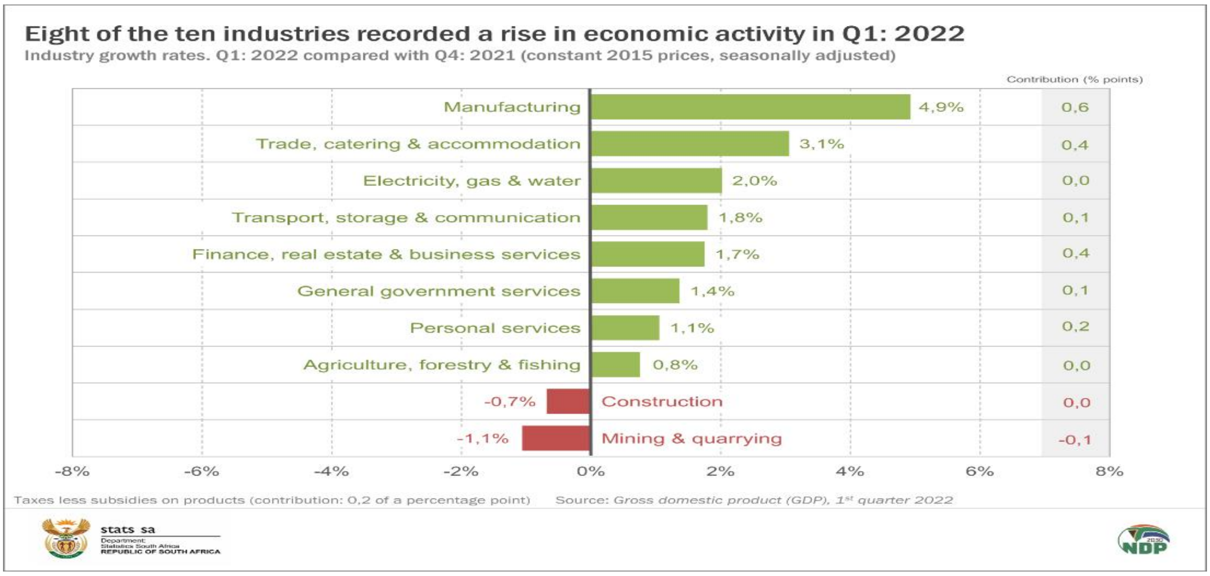


Figure 4.6: Economic activity

Source: STATS SA (2022)

Based on Figure 4.6, StatsSA (2022) ranked the hospitality sub-sector as 2nd after manufacturing. This is indicating that Hospitality sub-sector is competitive in contributing to GDP. Hence skills development policy and policy implementing partners need to collaborate with the industry to enhance training and industry (skilled labour supply and demand) input-output relationship in South

Africa.

4.1.6 Employer profile

Despite those corporates composes 10%, as employers in hospitality, they account for 1.4% of employees (employment) (CATHSSETA, 2020/21-2024/25 SSP). Nonetheless, scientifically documented statistics dating back to 2009, indicate the hospitality sub-sector as having a total of 16 444 registered employers and currently it's now at 40430 enterprises. SEDA (2021) reports 37% of trade and accommodation SMMEs have been performing in terms of start-ups and closures in South Africa. In the generalized statistics, hospitality is not adequately presented. Nonetheless, SEDA (2021) report shown in Table 2 below reflects the degree of recovery, as the average monthly sales during the first six months of 2021 are compared with those of a year earlier, as well as the pre-crisis level (from the average monthly sales during the final six months of 2019). The takeaway and fast-food subsector recovered the strongest (by 59.2%) to a level that was only 7.3% below pre-crisis monthly sales. This reflects the degree of adaptation in the tourism and hospitality industry as customers and businesses switched to takeaways. For the food and beverage industry as a whole, monthly sales averaged 25.5% below the pre-COVID-19 impact. This indicates the scope of sustained pressure on the hospitality industry, as well as some indication of the long road to full recovery. This implies the need to conduct a scientific-based audit that can establish current statistics in this regard, however, CATHSSETA (2020/21-2024/25) SSP in table 4.2.

Table 4.2: Employers in the hospitality sub-sector

SUB-SECTOR	SIZE OF ENTITY			NUMBER OF ENTITIES REGISTERED WITH CATHSSETA	% IN THE SECTOR
	SMALL (1-49)	MEDIUM (50-149)	LARGE (150+)		
Hospitality	27 575	768	391	28 734	72%

Source: adopted from CATHSSETA 2020/21-2024/25 SSP

The statistics do not indicate the geographical dispersion, of the hospitality establishments which can provide insights into contextualized skills needs because the nine provinces have different hospitality-supportive environments. Only a consolidated presentation is reflected in CATHSSETA 2020/21-2024/25 SSP.

Based on the evidence that SMMEs are presented as more employers, the Department of Tourism 2021 report on enabling SMMEs' survival/growth during and post COVID-19 reflects a framework that can guide such efforts. However, formal skills development was not adequately brought up, yet such mentoring/incubation discussions with corporates need a clear parameter that shows the benefits to be acquired by the mentoring organisations. Within this context, there is limited documentation on cooperatives in hospitality especially from a skills lens both before, during, and forecasting post-COVID-19 pandemic.

Table 4.3: Performance of SMMEs/SMEs based on sales

	Before COVID-19 July-December 2019 (R million)	**COVID-19 impact** January – June 2020 (6m % change)	**Recovery##** January – June 2021 (y-o-y % change)
Restaurants & coffee shops	3222.7	-52.6	46.3 (-30.7%)
Take-away & fast-food outlets	2055.6	-41.4	58.2 (-7.3%)
Catering services	915.5	-42.5	-10.0 (-48.2%)
Total food & beverage industry	6193.8	-47.4	41.6 (-25.5%)

Source: SEDA 2021 report

4.1.7 Labour market profile

The available statistics from CATHSSETA 2020/21-2024/25 SSP, speak of figures that are disaggregated by age, race, disability, gender, and geographical dispersion of the employees. The reflection of disability prevalence brings an interest in disability inclusion in skills development as well as preparing the industry to serve and manage disabled counterparts as both guests and employees (Makuyana & du Plessis, 2022). Such is relevant as WTO (2020) report regarded accessible tourism as a game changer for tourism recovery after the world-wide health crisis. In this regard, insights on inclusive/accessible human capital development can be obtained from Makuyana (2020). Nonetheless, CATHSSETA 2020/21-2024/25 SSP did not specify sub-sector-based role sizes but gave insight that there is no either job or job role size occupied by disabled people in the private sector. In addition, there is an underrepresentation of the said people both in public and private of the sector understudy. Mitra (2022) and Makuyana and du Plessis (2022a) believe that as long as disabled person has the capacity to handle job roles, while the work environment is inclusive; it is unnecessary to create special/ designated posts that give a ceiling for their career dreams, but affording their passion, talent, and agency to take them through the career path would be ideal. The 2% quota system on disability inclusion referred by CATHSSETA (2020/21-2024/25), applies to government and state-owned organisations, while the private sector, in general, is implicated from a Broad-Based Black Economic Empowerment (BBBEE) scorecard dimension (Makuyana & du Plessis, 2022b). Of the 2% quota for government and state-owned organisations, it remains unclear for the private sector in hospitality, hence, use their discretion and intuitive know-how in employing disabled people. That is why the majority tend to follow the learnership path as it does not guarantee employment but enables the organisation to earn BBBEE scorecard points. Furthermore, of the said 2% quota, it is unclear on the types of employment they are accessing. Hence the need for more research on disability/inclusive skills and education in the mainstream tourism sector so that both disabled and non-disabled can be equipped and prepared to join the labour market with employable competencies needed by employers (Makuyana, 2020). Unfortunately, there is a dearth of research on skill sets and development that nurtures and demystifies the nexus of characteristics of ageing, disability/ acquired impairment/health condition, and hospitality participation either as guests or employees, especially within a low-resource setting like South Africa.

The report indicates that 60% of employees in the tourism sector are found in the hospitality-sub sector (CATHSSETA 2020/21-2024/25-SSP). A lack of consistent sub-sector-based disaggregated labour market profiling exists. Such makes it unclear to trace the geographical dispersion of the labour market to the hospitality sub-sector, the occupation viz-a-vis qualification/skills possessed, and the source and type of the institution that awarded the qualification. Such makes it a challenge when designing a contextualised formal inclusive (age, gender, rural/urban, disabled included) skills development program under the CATHSSETA and their partners to supply skills and knowledge for the workforce. It is unclear on the dispersion of employment according to provinces within the hospitality sub-sector; hence it is a challenge to have a clear and objective assessment/measurement of changes/evolving trends at provincial, local or organisational levels. Though according to CATHSSETA 2020/21-2024/25 SSP, Gauteng has more employees. A general trend towards hospitality being dominated by females who usually are in non-professional and managerial positions. In the same report, it is observable that managers and professionals are occupied by white population groups, while technical and semi-professional to elementary occupations are occupied by Africans. Such trends pose the need to investigate career development, access to information, accessibility of information and resources, skills development, and types of opportunities.

Based on CATHSSETA (2020/21-2024/25-SSP), it is unclear on the skills and educational levels of employees in the hospitality sub-sectors. However, the report gives a generic picture based on types of occupation, which in most cases might not necessarily reflect skills and educational levels. The CATHSSETA 2020/21-2024/25-SSP reinforces the agreed position among academics, scholars, and industry-role players that hospitality prefers non- and semi-skilled to skilled and educated human resources because of the prevalence of in-house training. However, such has led to a consistent shortage of workforce, of which collaborative effort of industry and education and training would have alleviated while working together and not in 'silo'.

4.1.8 Factors affecting skills demand and supply

A plethora of interacting factors drive a disruptive change within the Hospitality sub-sector from a skills demand and supply lens. Such can include tourism shocks like natural, man-made crises and disasters like the COVID-19 pandemic that worsened the already transforming demand and supply of hospitality skills within the labour market. Based on both international and South African-based research, international organisations set the tone that guides hospitality organisations, for instance, the 17 Sustainable Development Goals (2017), which aims to bring a balance of development, humanity, and utilization of resources (natural land and marine included) for the benefit of humans. Hence, the demand and supply of hospitality skills evolve due to states' and governments' efforts to uphold the constitutional rights of all majority and minority citizens.

On the one hand, the research community in hospitality observes trends, and investigates the co-creation of knowledge that can inform the hospitality skills development landscape and the industry, especially on changes in labour and consumer markets, and the overall micro, and macro business environment. On the other hand, hosting communities and inequalities in society such as 'ill-addressed' indigeneity issues put pressure on the need to incorporate indigenous knowledge systems. Such is augmented by the need and ability to take advantage of technological advancements and transforming lifestyles within the people-environment. All this influences the development of skills that nurtures attitudes, behaviours, and perceptions that can make the hospitality industry thrive.

The section brings up the fact that the discussion on the mismatch of hospitality manpower needs and skills development has been existing as backdated to the 1970s, into the 1980s, 1990s, and now 2000s. This implies that despite emerging patterns that always implicate skills demand and supply for hospitality occupations if there is limited systematic industry-training linkages; a disjoint continue as traced to the coordination of HR practitioners' input in occupational role sizes design, and occupational skills design among skills development services providers. Unfortunately, this is a global issue that international scholarship debates and blame-shifting attitudes among industry role players and trainers perpetuates a 'them and us' system despite growth in the expertise of people who initiated skills development for the tourism and hospitality sub-sectors. Lupu, Tanase and Nica (2014) found a gap between students' perceptions and employers' perception on what is expected from an employee. This resulted in students with a tertiary education that were not equipped for the hospitality sub-sector. As a result, academia and the industry (employers) are required to work together to ensure future employees have the necessary skills. To this date, despite the evolution, the industry role players are reluctant and unwilling to appreciate and complement researchers, and educators, based on the prejudice said above; regardless of the existence of entities like CATHSSETA in South Africa. The opposite exists in the Culinary and Confectionary sections of the hospitality sub-sector because the profession emerged as a brainchild of the bakers and chefs themselves who prefer to train each other with a clear career path.

Globally, the hospitality sub-sector has adopted and adapted the usage of artificial intelligence, robotics, and global reservation systems even before the COVID-19 pandemic. COVID-19 exposed the need to adjust to hybrid approaches, re-evaluate HR management and practices, and re-evaluate and rethink robust skills that nurture sustainability and resilience whenever an unplanned development or change occurs. Such skills can leverage the state of technology, technological infrastructure, and innovation and culture toward innovative research entrepreneurship that upholds the socio-economic context of South Africa. Therefore, there is a need for a skills policy to support such while including need-based hospitality-embedded entrepreneurship as the SMMEs dominate hospitality and are consistently mushrooming. Skills supply and demand if balanced well can be a strategic pillar that enhances human capital efficacies to enable optimal usage of other forms of capital like social capital, and resources within the sub-sector. Therefore, the extant literature contributes towards establishing research gaps that can be explored using empirical methods for skills demand and supply to be addressed from a current and futuristic lens within the South African hospitality labour and consumer market context.

4.2 THE QUALITATIVE RESEARCH RESULTS

4.2.1 The hospitality sub-sector: An employer perspective

4.2.1.1 Overview of the sector and businesses interviewed

a. Background to the hospitality businesses

Table 4.4: Background to the Hospitality services business

TYPE OF BUSINESS	CODE	RESPONSIBILITIES
Owner of a guesthouse	HE1	Offering accommodation in the form of self-catering, camping and a wedding venue that can host more than 200 guests (20+ years).
General manager of a hotel	HE6	Accommodation and other services (26 years)
Owner of a restaurant	HE8	Food and beverage services (8 years)
Owner and general manager of a hotel	HE10	Accommodation and offering additional services such as a ladies and gin bar, a spa, a deli and wedding and conference

		facilities. (5 years)
Co-owner and co-chef of a restaurant and guestfarm	HE13	Accommodation and food and beverage services (2 years)
Manager and chef as a restaurant	HE17	Food and beverage services (1.5 years)
Owner of a restaurant	HE19	Food and beverage services (3 years)
Manager of a restaurant	HE21	Food and beverage services (3 years). Located on an olive farm that includes farm tours and olive tastings.
Manager of a caravan park/camping site	HE23	Accommodation but also offering self-catering cottages and an olive factory (16 years)
Owner of a restaurant	HD24	Food services and producing and selling locally brewed beer. (3 months)
Owner of a self-catering guesthouse	HE26	Offering accommodation services in the form of self-catering units (2 years)
Owner of bed and breakfast establishment	HE27	Accommodation services (23 years)
Owner of a self-catering guesthouse	HE28	Offering accommodation services in the form of self-catering units (2 years)
Assistant manager of a game lodge	HE29	Accommodation but also has a wedding venue, restaurant and spa
Owner of a bed and breakfast establishment	HE30	Accommodation services (13 years) and producing wine.

The sample of this section comprises 3 guest houses, 2 hotels, 3 take away counters/restaurants, 6 restaurants, 1 game lodge, 1 caravan park/camping site and 2 B&B accommodation establishments. The respondents have vast experience of the hospitality sub-sector which could provide depth to their answers in the interviews.

b. Changes in the sector as a result of COVID-19

From the discussion, it was clear that both positive and negative changes occurred in the hospitality sub-sector. HE24 opened their restaurant after COVID-19 while HE13 bought the restaurant/guest farm after COVID-19, thus minimising the effects of COVID-19 on their business.

The first change indicate by the participants was **changes in business models** (HE1, HE28, HE10, HE26). It was indicated that since the hospitality sub-sector came to a total standstill during COVID-19, HE1 found that tourists think differently about travel and tourists do not plan well in advance anymore. HE28 agreed that tourists now make last-minute bookings which change business operations. Similarly, hotels (HE10) received last-minute bookings and had to adjust their cancellation policies. HE10 explained that *[HE10…tourists lost trust in making advance payments]* which led to the change in policies. As part of a larger hotel group, HE6 started conducting their business online (e.g., Skype and Zoom) while difficult business decisions had to be made regarding employees and how to keep their jobs. While salaries were decreased, staff were not retrenched due to effective management. In relation to technology guesthouses also started operating on a self-check-in system to minimise contact with guests (HE26, HE28). Interesting that guests returned to the guesthouse even with no personal contact with the owner (HE26).

Form a restaurant perspective change in operations were evident (HE2, HE15). Since HE15 indicated that they sell their takeaways as either ready-to-eat food or frozen food but they had to close for two months before they could continue with production. HE2 indicated that there was a significant drop in takeaway sales which has not recovered yet. In the same sector, HE4 found that COVID-19 taught their clients more patience when waiting for their takeaways, especially in their “drive-thru” section. HE17 had to change their operating hours and added deliveries to stay in business. Both HE8 and HE21 experienced a big loss in income and still haven’t recovered their loss. This was due to expenses staying the same (e.g., salaries, rent) but no or little income was received, as well as tourists are returning slowly.

Secondly the **importance of the South African market** as consumers were realised by participants (HE6, HE26, HE28, HE10). HE6 indicated that they were receiving more visitors in the vacation months than before COVID-19. Both the guest houses (HE26 and HE28) and the hotels (HE10) experienced an increase in local tourists.

Thirdly, **changes in consumer behaviour** were noted (HE15, HE13, HE17, HE19, HE29). HE15 indicate that they had to search wider for new clients and invested in marketing. However, HE13 found that people were more informed and interested in food, resulting in a boost in sales. HE17 found that their quiet season is busier now and their busier season is even busier now – indicating changes in consumer behaviour. HE19 indicated that since they are in a small town, there were no tourists, but as the COVID-19 regulations started to decrease, business picked up *[HE19…people have an intense desire to travel, the restaurant business is still going well]*. The biggest impact of COVID-19 indicated by a game lodge (HE29), was that they had much smaller weddings. Their game drives were very popular as people wanted to be outside.

Fourthly, on a negative note **financial challenges and constraints** were mentioned by participants (HE23, HE27, HE30). HE23 found COVID-19 to be a quieter time in their personal lives’ as there were no guests, but it took a toll on them financially. However, their business has increased again. Bed and breakfast establishments (HE27 and HE30) were also closed during the peak of COVID-19. HE27 aimed to keep their staff and received assistance from UIF, but they did not contribute everything. Business has since picked up again to what it was before COVID-19. HE30 qualified to accommodate essential workers, but still had to make additional arrangements to keep their business operational.

The major themes are changes in business models, the importance of the South African market, changes in consumer behaviour and financial challenges and constraints.

c. Economic performance of the sector

Participants provided their opinion on the economic performance of the sector and possible factors that could influence growth. Firstly, it was indicated that there is **potential for economic growth in the hospitality sub-sector** (HE1, HE26, HE28, HE10, HE6, HE2, HE4, HE15, HE19, HE21, HE24). Guesthouses (HE1 and HE26) are positive about the economic performance of the hospitality sub-sector and stated that the sector is still growing - *[HE26…It is part of human nature to be out and socialising with people on different levels, and hospitality provides that opportunity]* and there is potential for growth (HE1). HE28 indicated that it is difficult to predict future reservations and income since tourists book the same day as they arrive but this influences the sector positively - *[HE28…Impulsive travellers have a positive impact on the economy]*. Hotels (HE10 and HE6) are also positive about the growth of the hospitality sub-sector. According to HE10, *[HE10…People want to travel and make up for lost time]*, but they are still uncertain about the potential for the future. HE6 is part of a large hotel group, they are positive about the economic performance of the sector because the group provides support and security.

Takeaway counters/restaurants (HE2, HE4 and HE15) all indicated positive economic growth in the food sector. HE4 indicated that there is always room for growth, and they will still grow in the future, *[HE4…If people have extra money, food is often the choice of treatment for themselves].* HE15 agree that *[HE15…People always have to eat]* and people are looking for something that is already available (e.g., fast food). HE19, HE21 and HE24 were positive towards the potential for growth.

Secondly, the economic growth of the hospitality sub-sector is **limited by financial constraints** (H8, H13, HE17, HE23). Not all restaurants were positive about the economic performance of the food sector. HE8 indicated that there is limited growth and since people are struggling financially, they would rather travel on a budget. HE13 mentioned the negative effects of increased costs such as wages and raw products. HE17 stated that since there is not a lot of support from the government, people have to create their own opportunities - *[HE17…Entrepreneurs should manage their own economic welfare. People come now to enjoy good food and not just get something in their bodies].* HE23 which manages a caravan park/camping sites indicated that since the public has less money in these economic times, they prefer more affordable accommodation, *[HE23…I think the public has less money, so they prefer cheaper options, such as for example camping and cheaper accommodation]*.

Thirdly, **external factors influencing economic performance** were indicated by participants (HE21, HE29, HE27, HE30). HE21 warned that people talk and making one mistake can have a big impact on your restaurant, *[HE21…It depends on a lot of things: Your service, the standard on your menu, how your food is prepared].* HE29 (guest lodge) explained that while there was a decline in international tourists during COVID-19, it provided them with time to renovate their offerings. As HE27 is located in a small town, it depends on what the tourists do there - *[HE27…We do our own marketing because the tourism (office) does not help].* HE30 stated that it would take time for the sector to recover after COVID-19, *[HE30…The after-wave of Covid has not passed and the weight of load shedding is adding pressure to the economic climate. People expect electricity when paying for accommodation. One should be able to provide that].*

The major themes that emerge include potential for economic growth in the hospitality sub-sector, limited by financial constraints and external factors influencing economic growth.

d. Challenges in growing the hospitality sub-sector

The challenges indicated by the participants were very diverse, but 2 aspects stood out namely competition and the effect of rising costs and financial challenges.

Firstly, **competition** was mentioned by a number of participants (HE1, HE5, HE15, HE19, HE29). HE 1 mentioned the wide range of competition (HE1) as a challenge. HE6 highlighted customers and competition, explaining that to convince previous customers to come back, they need to deliver more services than before. There is also more competition, and all the competition is in the same market (whether it is a 1 or 5 star establishment) in order to generate an income - *[HE6…You can't say anymore that you are a 3-star hotel and we only do just that. I think you can be a 3-star hotel, but you should deliver the same services as a 5-star hotel to get a bigger part of the pie]*. From a restaurant perspective HE15 and HE19 mentioned competition - *[HE19…Everyone thinks opening a restaurant is quick and easy]*. HE29 also identified competition as their biggest challenge at the game lodge. Since there is no standard of quality, many people entering the sector have the perception that anyone can manage a guest house.

Secondly, the **effect of rising costs and financial challenges** was mentioned by participants (HE26, HE17, HE8, HE15, HE17, HE29, HE23, HE30). HE26 stated the rising cost of inflation as rates cannot keep up with inflation (HE26). From a restaurant perspective HE15 mentioned increasing prices due to increasing input costs and very price-sensitive clients as challenges for their takeaway business. HE17 indicated rising food prices as a negative factor - *[HE17…Everything has become very expensive].* HE8 added that people are struggling financially, and spending money is limited. HE29 also identified the availability and access to funding is another challenge. While many caravan parks / camping sites focus on budget-friendly accommodation, HE23 stated that poor economic conditions restrict people from travelling, *[HE23…The economic condition of this country is what prevents people from coming more offer and for longer periods of time].* HE30 indicted that operating costs such as electricity is a challenge, *[HE30…Operating cost are high taking into consideration fuel and energy prices].*

Thirdly, **operational challenges** were mentioned which refer to aspects that can improve or hamper the functioning of the business (HE26, HE28, HE10, HE2, HE4, HE24, HE21, HE27). International markets have not yet returned as usual (HE28). HE26 indicated that - *[HE26…The industry cannot stay faceless, personal interaction should come back]* while HE28 added that *[HE28…The challenge is to survive the next three years until total recovery].* HE10 was still uncertain and hesitant about taking a risk to expand the hotel. However, an increase in guests has allowed them to start conversations about expanding.

HE2 was concerned about another lockdown that would have a very negative effect on their takeaway business. HE4 did not mention a specific risk but expressed relief that COVID-19 was over. HE24 experienced their biggest challenge as load-shedding, *[HE24…to beat Eskom].* HE13 explained that employee legislations are very strict and does not consider the whole industry. Family or personal problems among staff also influence their work. HE21 is constantly updating their skills, both the manager and restaurant staff, to stay competitive. As the manager teaches herself the new skills, she then teaches the employees as part of the in-house training, *[HE21…We regularly have something new on the menu. We now had our own pizza oven built].* HE27 found the red tape of municipal services as a challenge for their bed and breakfast establishment, *[HE27…We pay more just to have (access to) electricity than for what we use].*

The major themes include that hospitality sub-sector is facing various challenges that can prevent them from growing. This includes competition, the effect of rising costs and financial challenges and operational challenges. It was clear that the effect of rising cost was considered as the most concerning challenged faced by the hospitality sub-sector.

4.2.1.2 Labour-related information

a. Types of occupations/positions relevant to the hospitality sub-sector

From the discussions with the participants, it was clear that this sector **placed more value on skills than positions/occupations.** Participants indicated that positions are not the key aspect but rather the skill and ability to work with people (HS1, HE10, H26, HE29, HE23).

Secondly, this sector provides **opportunities for a variety of occupations**. It was highlighted by participants that positions necessary for successful operations are good managers (HE17, HE30, HS6), computer literacy regarding an administration position (HE10, HE6, HE28, HE29) financial background or manager (HE10, HS6, HE29, HE23) and someone that understands service delivery and could market the product (HE28, HE30). HE30 explains that the position usually comprises someone [HE30...*that can do anything and can think on their feet].* HS2 stated [HS2...*constantly have people who are graduating in the sectors who understand what it means to be a service provider and who have the ability to brainstorm with others to provide solutions*]. The sentiment was supported by HE10 who felt that employees must be able to work behind the scenes, but managers (HS8) must always be present which supports the notion that the majority indicated in 1.6.4.1.1 that owners/managers are the main role-players and positions in hospitality businesses.

Housekeeping was indicated by HE13, HE26 and HE29 as important and HE13 added [HE13...*that people should have the ability to work on their own…*]. HE19, HE29 and HE21 stated that in their business positions such as qualified kitchen staff and trained chefs are important (HE29). According to HE24 [HE24…*every position works together, and no one cannot go without the other one….*] which were supported by HE15, HE19, and also stated by HE27 that [HE27...*all staff are very important* …].

The major themes that emerge include skills are higher valued than positions and the sector provide a variety of opportunities for occupations.

b. Types of qualifications relevant to new employees

The discussions led to a clear preference for experience over qualifications however qualifications were needed in certain positions.

Firstly, **experience was considered as critical in the hospitality sub-sector**, even more important than qualifications (HE10, HE13). HS1, HS8, HE15, HE19, HE21, HE23, HE24, HE27, HS4 and HE17 indicate that no specific qualification is necessary, but the employees should at least have a matric qualification (HS6, HS2, HE26). HE10 adds they rather seek people [HE10...*that are trustworthy, professional and have good character*….].

Secondly, **qualifications are needed for selected positions** (HE29, HE6, HE19, HE28, HE1). In this sector, one can work yourself up, but for financial positions, you will need people with the relevant qualifications (HE29, HE6). From a qualification point of view, HE19 indicates that managers (HE30), marketers and financial officers should have formal qualifications. It was highlighted by participant HE28 that training in housekeeping and front-of-office is very important in their establishment, but cleaners and helpers are essential in any hospitality establishment (HE1).

The major themes that emerged are experience is considered as critical in this hospitality sub-sector and qualifications are needed for selected positions.

c. Skills needed to work in the hospitality sub-sector (pre- and post-COVID-19)

The discussions with hospitality stakeholders revealed interesting results related to skills but also characteristics with some changes noted. The following skills and characteristics were identified:

- Critical and creative thinking (HE6, HE21, HE19) [HE6...*to have people skills, be patient and to think outside the box…*] HE21 and HE19 stated that one needs to review how things are done based on experience, finding better ways to address challenges and difficult clients. Added to that, HE30 indicated that [HE30...*businesses should diversify their product and create more offerings since it will also lead to a more sustainable tourism product].*
- Health and safety awareness (HE23, HE26, HE4) (HE4 explained that [HE4...*staff had to understand the importance of personal space, privacy and confidentiality of guests….*].
- Trustworthiness (HE13, HE30, HE28)
- Having the right personality (HE19, HE26)
- People skills (HE19, HE6)

- Skills related to a specific function (HE1 indicated people are hired for a specific function such as waiters.
- Customer service (HE10)
- Loyalty (HE8)
- Work under pressure (HE8)
- Soft skills (attention to detail, being friendly and being an outgoing person that can think on their feet and communication skills are very important)
- Technology skills
- Language skills (HE17)

Although safety and security were highlighted as major changes after COVD-19 it was also mentioned by HE30 that product owners should be able to develop new products and provide more experiences to the changing market. Labour laws and new skills towards these changes from managers are necessary according to HE19. With the creation of new opportunities, staff were sometimes required to multi-skill for example HE13 stated that staff working in housekeeping had to help in the restaurant as well.

The major themes that emerge are critical and creative thinking, health and safety awareness, trustworthiness and the right personality which have people skills.

d. Readiness of employees entering the hospitality sub-sector

Participants opinions related to employees' readiness to enter the hospitality sub-sector were asked. Two major themes emerged from the discussions.

Firstly, it was realised that **future employees are not ready to enter the sector** (HE17, HE4, HE26, HE30, HE24, HE2, HE21, HE15, HE13). HE23 support the overall view of the participants that voiced their concern that students are not ready and need additional training in-house.

Secondly, **experience will add to improve the readiness of future employees** (HE13, HE27, HE29) It was mentioned by HE13 that students that hold a qualification demonstrate some book knowledge but did not have the experience to help them implement their skills. HE27 prefer appointing older staff with experience. HE29 however indicated that if new employees have a post-graduate qualification, they are ready for the workplace.

The major themes that emerge are future employees are not ready to enter the sector and experience will improve the readiness of future employees.

e. Challenges in the current labour market

On the question related to the challenges that the sector experience in relation to the labour market the following themes were developed:

Firstly, **workplace challenges** are considered as important (HE4, HD26, HE15, HE24, HE2, HE23, HE19, HE8, HE10). People do not like change and HE4 indicates that the employees in their enterprise do not take change well, it is stressful. HE26 states that fewer challenges exist with her employees that worked for more than 12 years (HE15). However, it is difficult to motivate staff to stay at an establishment when hours are very long (HE24, HE2, HE23). Daily wages and the current economic situation are adding to the challenges employers in the hospitality face (HE19, HE8, HE10).

Secondly, the **motivation of new employees is questioned** (HE29, HE17)
Some of the challenges mentioned by HE30 included the lack of experience by employees and a very small pool to recruit people from and young people tend to expect a lot but are not prepared to work for it (HE29). HE17 stated that [HE17....*people get the position but then lose interest. They see it just as a job, there is no passion or pride*…].

The major themes emerge as workplace challenges and the motivation of new employees to work in this sector is questioned.

f. Upskilling of the labour market

From the discussions there were significant support for continuous upskilling of the employees with the aim of empowering them (HE1). One theme emerged namely the need for internal and external training.

The **need and necessity for internal and external training** was noted focusing mainly on basic training (HE1, HE10, HE13, HE8, HE19, HE15, HE21, HE28, HE23, HE24). Upskilling is done in most establishments and people offer the reasons for this because they like to empower people (HE1); get motivational speakers (HE10); to provide an experience (HE13). HE6 indicate that training such as first aid, general management training and UDEMY training is organised to make sure employees receive recognition in the form of a certificate. According to HE8 [HE8…*it is important to teach individuals how* *to take responsibility, communicate effectively, how to interact with people and understand why certain things are done in a certain way…*]. Even basic training is provided such as making coffee baristas (HE19), baking courses (HE15), how to bake pizza (HE21), basic housekeeping (HE28), cleaning techniques (HE23), and beer course (HE24).

The training in various instances is very basic but some establishments are hesitant to provide training because people leave after investing in them (HE29).

The major theme that emerged relates to the need and necessity for internal and external training.

g. Support of internship program or learnership programs

On the question whether participants employ people in learnerships or internships one major theme evolved namely supportive of Internships and Learnership.

The stakeholders are **supportive of internship and learnership programs but limited participation** (H29, HE30, HE26, HE8, HE13). HE29 made use of an internship for nature conservation from Centurion Academy, but it did not work out because the work was different from was expected from the candidate. HE30 does not use the programme but will consider the possibility to engage in future. HE26 was part of the "network Tourism Programme" in the past and HE8 participated in the leadership programmes for career development received from The National Department of Tourism. Learnerships are important as it provides learners with some experience, but it also brings some academic knowledge to the current staff (HE13).

The major theme evolves around support for such programmes but there is limited participation.

4.2.1.3 CATHSSETA-related information

To assess the knowledge of participants related to CATHSSETA and relate programmes a discussion related to participation in opportunities created by CATHSSETA was done.

One theme developed form the discussions namely **no, to limited knowledge and involvement**. Participants were asked if they participate in any opportunities created by CATHSSETA, the majority (HS1, HE26, HE10, HE6, HE2, HE15, HE13, HE8, HE19, HE21, HE24, HE17, HE29, HE23, HE27, HE30) indicated that they do not. Participants HE4 and HE28 indicated that they do not know about

CATHSSETA, however, participant HE28 further states that if they knew they would make use of the opportunities if they had more information.

The major theme that emerged is no, to limited knowledge and involvement.

4.2.1.4 Involvement in the sector

a. Input to policies and strategies

In terms of active involvement in the sector's development regarding inputs to policies, development plans and workshops two themes emerged namely no involvement and limited involvement. Firstly, with regard to **no involvement** the majority of participants indicated that they are not involved or associated with the sector's development regarding inputs to policies, development plans and workshops etc. (HE1, HE26, HE2, HE4, HE15, HE13, HE19, HE21, HE24, HE17, HE29, HE23, HE27, HE30).

Secondly, **limited involvement** was noted through attendance of meetings HE28, HE10, HE6 and HE8 indicated they were involved in the sector's development regarding inputs to policies, development plans and workshops by participating in meetings.

The major themes that emerged is no involvement and limited involvement.

b. Membership of relevant associations and organisations in the sector

The discussions led to the development of one theme, namely limited involvement. HE28 indicated that they are associated with the community tourism council, HE10 indicated they are associated with bookings.com, HE6 is associated with the University of Johannesburg which bring students to complete their studies at the lodge and participate in job training and lastly, HE8 is associated with the National department of tourism for career development.

The major theme that emerged is limited involvement in associations.

4.2.1.5 Future work in the hospitality services sector and aspects to consider for development

According to the discussions with the participants the future work of hospitality is viewed from a positive perspective, quality services levels are important and the sector should face certain inhibiting factors.

Firstly, the stakeholders are **positive about the future of work in the hospitality sub-sector** (HE1, HE10, HE13, HE15, HE23). The majority of the participants are very positive about the future of and the impact of the South African tourism industry, HE1 *[HE1…there is a lot of scope for job creation…]* and HE6 [HE6…*this industry creates the most jobs. If you have passion and want to make a success it is a good sector*…]. HE10 highlighted Kruger Park as a potential job creator for hospitality employees. Participants in the restaurant sector (HE13 & HE15) are also very confident that the future of restaurants is secure because people always want to spoil themselves with food which then provide the opportunity for chefs, pastry cooks and waiters to continue working in this sector.

Secondly, **providing quality service** is important going forward (HE28, HE23, HE30, HE29). Because some businesses are very seasonal alternative products should be developed and introduced into the market (HE28) and to sustain a competitive advantage through good quality, kindness, good reception and keeping guests happy should be priorities (HE23). Guest houses according to HE28 have […*the scope to provide a personal touch, and a homey feeling and can help grow the future…*]. HE30 adds to this by stating that tourists seek a unique experience, personal attention and new adventures which gives the scope for growth in the industry. HE29 point out the developing domestic market and the possibility of the international market returning.

Thirdly, some **inhibiting factors for growth** were mentioned by participants (HE21, HE23). There is however those that are not that excited towards the future and HE21 and HE23 are concerned about the economic climate, the energy crises and the increase in prices of goods and services.

The major themes that emerged are a positive outlook on the sector, providing a quality service and inhibiting factors for growth.

4.2.2 The hospitality sub-sector: An academic perspective

4.2.2.1 Background to the involvement of academia in the hospitality sub-sector

The participants were drawn from a variety of educational institutions as can be seen in Table 4.5.

Table 4.5: Positions and duration of involvement

POSITION	CODE	DURATION OF INVOLVEMENT

Director of Tourism and Hospitality at a tertiary education institution	HA1	12 years
Executive Dean: Training and Development	HA2	20 years
Academic researcher in a tertiary education institution	HA3	8 years

Academics with significant experience in teaching hospitality related subjects participated in the interviews. They can provide perspectives over time.

4.2.2.2 The educational landscape

a. Changing educational landscape for hospitality

It is important to determine how the education landscape has changed for the hospitality sub-sector as it has an influence on future planning and development.

Three aspects were noted from the discussions namely, **changing student profile** (HA1), **changing content of programmes** (HA1), **influence of technology and keeping up with changes** (HA2). HA1 noted observing a change in the demography of the typical hospitality student, with the trend shifting toward black African females. HA1 also notes [HA1...*sort of growing debate is around decolonisation and indigenous food*]. Improvements in teaching methods and technology were also cited by HA1, for instance, menus are increasingly becoming paperless facilitated using tablets. HA2 notes a split in higher education with some institutions innovating and advancing in terms of their curriculum development and values proposition for students and the industry while some conservative institutions have been stagnant in their offering.

The major themes that emerged relates to the changing student profile, changing content of programmes, influence of technology and keeping up with changes.

b. Curriculum changes

Based on the discussions the importance of more advanced qualifications was recognised and a move towards skills-driven curriculums.

Firstly, the importance of both **advanced qualifications and occupation specific qualifications** were recognised by HA1. There was a shift from offering diplomas in hospitality management to more advanced qualifications such as a degree in food and beverage operations. Vocational diplomas and beverage operations have also allowed HA1's institution to focus on occupation-specific skills and qualifications.

Secondly, the move towards **skills-driven curriculums** was indicated by HA2. HA2 stated [HA2...*most I would say leading schools have moved away from a very content and skills-driven curriculum to more of a… 21st Century skills, communicative ability, your teamwork ability, your problem-solving ability, those soft skills*…]. Experiential learning was said to close the employability gap in the hospitality sub-sector (HA2).

The major themes that emerged include the importance of both advanced and occupation specific qualifications as well as skills-driven curriculums.

c. The effect of bodies such as the Department of Higher Education on programme development

From the discussions themes around **praise and frustration** evolved.

Firstly, praise was given to DHET that now allows research by academics to feed into the Department of Education's policy and curriculum content review (HA1). HA2 both lamented and praised the strict regulatory framework of the Department of Higher Education for being an accountability entity, but slow to change and to administer critical issues such as accreditation of programs and private institutions in particular. This is a barrier to entry for new innovative skills programs that will benefit the hospitality sub-sector with a skilled workforce (HA2).

The major themes evolve around praise and frustration.

4.2.2.3 Labour-related information

a. Qualifications and skills relevant to the hospitality sub-sector

From the discussions it was clear that there is a focus to train students for **managerial positions** (HA2) **and specific positions in the sector** (HA1). HA2's institution has traditionally offered a 3-year hospitality qualification and as a private tertiary institution, postgraduate qualifications are not economically viable. But their students have the financial and analytical abilities to be absorbed into managerial jobs faster compared to other graduates (HA2). HA2 also offers a three-year price and hospitality management degree and this give access to for example revenue management positions.

Essentially their key selling point is offering real-world learning opportunities through WIL. HA1 stated that they offer diplomas and degrees in hospitality management. It was important to them to train a person for a specific position in the hospitality sub-sector.

The major themes that emerged relate to managerial positions and specific positions in the sector.

b. Changes in skills pre- and post-COVID-19

It was clear from the discussions that COVID-19 led to changes that need to be incorporated into programmes moving forward. HA1 noted a shift towards more technical skills requirements post the pandemic. Leadership, critical thinking and problem-solving and soft skills have increased in importance in hospitality (HA1). HA1 also pointed out that [HA1…*and many times we have students coming but they don't actually have a hospitality background. We actually tell the students, even tourism students, to forget everything they taught you at school. Start from scratch*]. Problem-solving and thinking out of the box, and resilience (flexibility and adaptability) skills emerged as critical post-COVID-19 skills (HA2).

The major themes include the importance of leadership, critical thinking and problem-solving and resilience and soft skills.

c. Changes in occupations related to the hospitality sub-sector

The discussions related to changes in occupations point to the increased **multi-skilling**, the **application of technology** and **occupations becoming more entrepreneurial** in this sector. HA1 believed work-integrated-learning is no-longer adequate as placements since employees in hospitality need to be more agile now and be more generalists to fit into various roles and functions. Tech revolution and Gen Z have necessitated transition to technology and more efficient service delivery. HA2 points out that there is a definite shift towards those in their respective occupations becoming more entrepreneurial and marketing-oriented to better deal with changes in the industry and be able to innovate and exploit new opportunities.

The major themes focus on the multi-skilling, the application of technology and occupations becoming more entrepreneurial.

d. Shifts in the labour profile of the hospitality sub-sector

Different opinions were evident from the discussions related to the profile of the hospitality sub-sector. HA1 noted the hospitality sub-sector is mostly African females, however males still dominate the supervisory and managerial positions. HA2 believed hospitality in South Africa suffers from the effects of a 21-Century skills gaps and that the country is falling behind other countries in terms of equipping their graduates with the required skills for top positions in hospitality.

The major themes that emerged include glass ceiling for and the need to train 21st Century soft skills.

e. Attractiveness of the hospitality sub-sector for learners

Participants were requested to comment on the attractiveness of the conservation sector for potential learners. HA1 considered the hospitality industry to be attractive to students due to the popularity of reality shows like MasterChef. Social media has elevated some aspects of the hospitality industry. [HA1…*especially with COVID-19. I though oh where are we going to get students in for food and beverage operations. We hit our targets, even tourism. So clearly there is interest*]. HA2 admitted that lower-level jobs were not attractive for learners who would consider joining the hospitality industry. However, opportunities higher up the managerial and skilled levels were very attractive to the youth compared to other occupations, and that makes the industry attractive overall, because skills shortages mean better perks for skilled labour in hospitality.

The major theme emerged as attractiveness on higher levels of the sector.

f. Challenges in the labour market related to hospitality

On the question related to the challenges in the labour market the academics highlighted the **importance of experiential learning** and **investment in skills training**. Students from poor backgrounds need exposure with practice aspects of the hospitality industry, as they need more experiential learning (HA1). More pertinently salaries and wages in the sector need to be improved, the knowledge and skills training of graduates needs to be differentiated from low-skilled labour (HA1). The main challenge in the hospitality labour market is limited investment by government in skills development (HA2). Additionally, TVETs and HEIs need to admit their shortcomings and consult with industry in terms of the skills and skillsets required by industry because they are producing ill-equipped graduates who will remain unemployed post their qualifications (HA2).

The major themes focus on the importance of experiential learning and investment in skills training.

4.2.2.4 Future look of the hospitality sub-sector

a. Future of hospitality as part of the tourism industry

On the question related to the future of conservation as part of the tourism industry the responses were clear. HA1 stated [HA1…*you and I are always going to need a hospitality service, we always need food as we travel*…], hence at the core of the future of hospitality is good. The future of the hospitality sub-sector is bright if the government does not put barriers via misinformed policies and politics and less interventions would allow the sector to flourish (HA2). Additionally, the cost of a good qualification in hospitality is a barrier to skills development and entry, whereby private entities are very expensive and good public institutions are very competitive in terms of enrolment (HA2).

The major themes include limited government intervention and improved access to education.

b. Level of professionalisation of certain occupations in the hospitality sub-sector

Professionalisation is also highly debated in the hospitality sub-sector. HA1 indicated that a lot still needs to be done around professionalising occupations such as baristas and sommeliers. There is a gap in the FET colleges space for professionalising some aspects of hospitality that universities cannot offer - [HA1…*to address the gap is to better collaboration between industry and higher education around this sort of skilling and professionalisation around different aspects of the sector*]. Industry recognises schools more than they do qualifications as a cue for more professional skill capability (HA2).

The major themes include support for professionalism.

c. Important aspects of developing this sector

In this section the participants could indicate the aspects that are important in developing the hospitality sub-sector. HA1 believed opportunities for developing the sector were being missed due to limited return on investment of levies paid by tourism businesses. HA2 added another dimension indicating that the hospitality sub-sector [HA2…*doesn't need help developing. It needs to not be blocked*]. It is recommended that government remove the barriers and for instance through CHE, track student success and be more reflexive with their offering through public higher education institutions (HA2).

The major themes include removal of barriers to develop.

4.2.3 The hospitality services sector: South African disability alliance

4.2.3.1 Overview of the interviewees and sector

a. **Background to organisations for people with disabilities**

HD1 emerged to serve the interests of marginalised groups like short-stature for their life as equal citizens in Southern Africa. HD2 has over 100 years since it was formed as a national body, and then transformed to have an international scope which made it to have 17 national organisational-member bodies. The 17 member bodies are community-based organisations that provide residential care, day-care, protected workshops that provide skills to persons with intellectual and psychosocial disabilities. The organisation is now playing a role of advocacy from human rights lens as part of the broader services to variety of persons with disabilities based on Convention for Rights of Persons with Disabilities. The organisation considers awareness and basic education and literacy about mental health as a neglected area in disability movement. HD3 is a network for persons with disabilities in Western Cape to conduct technical accessibility advise for greater inclusion of various access-need societal and business stakeholders. HD4 is specifically concerned about autism and means to enable effective interactions and communication in both society and business environment. HD5 has more than 100 years in existence while serving the concerns of hard of hearing and blind people from advocacy to provision and facilitation in co-creating inclusive environment as well as assistive technology and education and training as schools and college levels. They are also involved in career guidance and skills development for their beneficiaries to live and contribute to the socio-economic environment as a non-profit organisation. They are 3 participants from the latter organisation.

These stakeholders are in management positions that look after advocacy, management and inclusive initiatives. Other responsibilities included education and awareness, imports, exports, distribution, marketing selection and managing cost effective and meaningful assistive technology, accessibility and policies to the fundamental preparatory phase for inclusion and not as an afterthought. However, they have acknowledged that tourism and hospitality was not yet part of their careers they have knowledge on as well as guiding their beneficiaries on, but are available to configure their content and material to incorporate characteristics of tourism, hospitality and conservation to enable inclusion and universal accessibility. What has become more important recently is people skills, empathy after getting training, engage and exposure to demystify assumptions and stigma associated with people with disabilities and alleviating of ignorance using knowledge on disability, within the tourism, conservation and hospitality contexts.

The participants have been working in the disability sector between 8 and 30 years and there are experience and knowledge related to the disability inclusion and skills needed to co-create the socio-economic and built environmental accessibility that serves workforce, tourists, entrepreneurs among other access-need population groups.

b. Changes in the sector as a result of COVID-19

Participants were requested to provide their view on the changes in the sector as a result of COVID -19. Participants from HD5 states that COVID-19 facilitated in unveiling a disconnection between tourism and disability; however, potential is yet to be explored, if stigma on blind people is unchanged by skills and knowledge, but on a positive note [HD1… *believe COVID-19 made tourism and hospitality sub-sector realise that disabled people are a market and not only a charity case*]. HD4 indicated that experts' opinions like medical practitioners and therapists have been taken with uttermost value, while overshadowing the need to engage the autistic person in coming up with interventions and approaches. [HD4… *opine that the lockdowns measures made it clear that there is need for co-creation of value through dialogues between involved people and tourism and hospitality is service and people oriented hence skills and knowledge should be informed by both experts and disabled people's voice*]. HD3 believe universal accessibility was proved to be a necessity for old people and people with disability to live with dignity while participating in tourism and hospitality as guests. [HD3… *has been providing technical support and training to corporates during the health pandemic, such can be provided to the sector in question*]. HD2 observed an increase in mental health issues at workplace and household level due to COVID-19, lockdowns and work and work space and life dynamics (stresses) on daily basis. [HD2… *reflect that tourism, hospitality and conservation material (skills and knowledge) has not yet incorporated issues and approaches that perpetuates understanding of mental health, whether as a tourist, workforce and management among other stakeholders*]. [HD1… *believes, COVID-19 helped in sensitisation of disability, this positive stance can get a feature of curriculum for skills set for back and front office as a subject(s)*]. It was indicated that it can enable organisations became more efficient and more effective, while taking advantage of technological usage as technology is key aspect for universal accessibility.

One of the most important challenges due to COVID-19 was noted as the financial constraints, restructuring of skills offerings to incorporate disability knowledge and skills and train the trainers in the sector on disability and accessibility.

c. Economic performance of the sector

The participants were requested to provide their opinion on the economic performance of the sector and indicate the factors influencing growth in this sector. The organisation where participants are situated are funded by both the government and international donors. Within the funding structure, hospitality and tourism skills development has not been considered even from CATHSSETA's funded programmes, yet accessibility has both economic and social return on investment within the transformative agenda of South Africa beyond political correctness. It is recognised across the world that hospitality and tourism organisations from education to business still regard disability and inclusion (universal accessibility) as a cost rather than investment [HD1…*indicated that accessible tourism can yield value from ageing markets especially from other countries who have the time and resources to travel to South Africa as a tourism destination*].

The main theme focused on financial difficulties and potential to yield value form ageing markets.

d. Challenges in growing the universally accessibility (disability inclusion) in the sector

The challenges in growing universally accessibility in the hospitality sub-sector were diverse. On a positive note, [HD1… *stated that the people are beginning to acknowledge barriers and where it is still a challenge which can be addressed by skills development is attitudes among personnel in the sector*]. [HD2… *indicated that mental health is assumed to be affecting certain people, yet everyone is affected in one way or the other, however coping mechanism and resiliencies vary*]. [HD3… *raised concern over lack of standardisation on accessibility in hospitality sub-sector*]. It is indicated that work output-performance in the hospitality sub-sector is influenced by skills development that nurture non-disabling interactions among diverse people.

HD4 opine that there is misinformation and misunderstanding of what autism is, and such brings fear of the unknown and are scared to serve and handle an autistic person. [HD4… *indicated a lack in listening to what an autistic person needs and follow it. People prefer to think on behalf of the person, while lack understanding of what autistic persons are capable of so often; such cuts across all disabilities. Employers and policy makers think if one has autism, he/she is not able to handle high level job; which is not always the case. Sometimes the image perpetuated by mainstream media makes people not to see the actual person, for instance the moment they disclose the autism, they struggle to even get invited for a job interview due to lack of support*].

[HD5… *considered the way tourism and hospitality sub-sector in South Africa sees disability sector and* *people with disabilities like blind people as not ideal candidate. I don't think blind people necessary think that tourism sector would be inviting because there are no opportunities for career growth for us*]. One the other hand, HD5 asserts that their organisation has not yet considered hospitality occupations, hence a challenge for the sector to understand their inclusion as compared to other industries like engineering, and IT. Therefore, HD5, concurred that they will begin to bring hospitality and tourism as a career to guide their students and beneficiaries, as well as engage curriculum design for hospitality-skewed competencies with the help of tourism/hospitality experts. This can make their students from the schools they operate/run to enter the sector in question. HD5 mentioned the need to bring the hospitality and tourism as part of the agenda at EXCO so that a consortium-based coordination amongst South Africa Disability Alliance members can be established for a well-coordinated engagement with CATHSSETA for disability inclusion skills development funded programmes that covers all types of disabilities, while integrated into tourism, hospitality context.

The major themes focused on identifying challenges and suggested on solution for a comprehensive and joint competency development for the hospitality and tourism sector.

4.2.3.2 Labour-related information

a. Types of occupations/positions relevant to persons with disabilities

On the question related to types of occupations relevant too people with disabilities it was indicated that there is no specific occupation designated for persons with disabilities, any occupation can be handled by any person, as long as environmental arrangement and competencies affords him/her opportunity to do the tasks. Therefore, the skills development should be in a practical sense that fosters accessibility and inclusivity within the team. This implies that all critical labour needs for the sector applies to workforce with disabilities.

The major theme highlighted the notion that the occupations remained the same, but a different skills set that nurtures inclusion and accessibility is needed.

b. Types of qualifications relevant to new employees

On the question related to types of qualifications it was stated that disability inclusive skill sets need to be a part of hospitality/tourism diploma, degree and certificate. Relevant support can be facilitated at the workplace as the organisations engages organisations for people with disabilities, accordingly. However, currently there are no hospitality/tourism sector-specific qualifications offered by universities, technical vocational colleges and even the organisations for people with disabilities-home grown ones. But based on the need for universal accessibility, we are getting started towards contextualising existing skills-sets made for other sectors.

The major themes indicate the need for skills-set at any-level qualifications to nurture practical approaches to hospitality/tourism theory and practise.

c. Disability-skewed skills needed for hospitality/tourism sector (pre and post COVID-19)

Participants concurred that disability inclusion is centred on universal accessibility and reasonable accommodation is essential to address individual's needs for full and effective participation. Hence, a common stand view among the participants pointed towards tourism/hospitality experts, who have focused on disability/accessible tourism to collaborate with them for each disability's (impairment-specific) relationship to tourism/hospitality from tourist to business processes like marketing, human resources, employment and workplace lens. During pre-COVID-19, some organisations followed inclusive policies by developing disability policies. More responsibility and pressure emerged from disability sector to protect rights of the vulnerable and to educate people about disability and ageing. During COVID-19 and post pandemic, working from home was preferred by significant number of workforce with disabilities as they would be in their comfortable environment and technology as well as flexible HR approaches made them more productive and confident.

Skills mentioned:

- Disability-skewed soft skills [HD1; HD2; HD3; HD4 & HD5].
- Self-awareness, emotional intelligence, and mental health [HD4].
- Hospitality and tourism-technical skills [HD5-1;2&3].
- People and communication skills [HD1; HD2; HD3; HD4 & HD5].
- Disability, accessibility, teamwork; problem-solving skills and exposure [HD1; HD2; HD3; HD4; & HD5].

d. Readiness of hospitality sub-sector to support entry of inclusive labour

It was important to determine the readiness of employees to be inclusive. It was stated that the students, industry and employees (workforce) are not ready to be inclusive as they are ignorant of disability and tourism/hospitality; worse inclusive approaches and co-creation of universal accessibility throughout the value chain. [HD1…*recommends educational institutions to keep developing knowledge and theory related to the subject matter*]. HD5 concurred that exposure in addition to practical-based knowledge and skills can make tourism stakeholders ready. [HD5…*alludes that when one acquires visual impairment, one is taught the 'art' of using other senses and assistive technology to function in the way anyone with all senses do*].

HD3 indicated that educational institutions use curriculum and not all skills can be part of the knowledge set, hence they can complement such skills, especially if CATHSSETA funds the organisations for persons with disabilities who can train both educators and industry-hospitality/tourism stakeholders while working. This will be crucial as the organisations are struggling to fend their beneficiaries due to an insufficient financial base and ability to source external funding for the sector in question.

The major theme of not ready emerged based on ignorance, limited exposure, experience and limited available skills for the sector.

e. Upskilling of the labour market

Upskilling remains an important aspect for an employee's development. All participants indicated that the current hospitality/tourism sector needs upskilling for them to be ready for all [HD1; HD2; HD3; HD4 & HD5]. The following approaches were suggested, these are not limited to in-house training, online training, guest-lecturing, training the trainers, training the workforce as spearheaded by the organisations for people with disabilities [HD1; HD2; HD3; HD4 & HD5].

The major themes that emerged included the importance of continuous upskilling using external and internal upskilling programmes.

4.2.3.3 CATHSSETA-related information

To assess the knowledge of participants related to CATHSSETA and relate programmes a discussion related to participation in opportunities created by CATHSSETA was done. Participants indicated no involvement with CATHSSETA due to the organisation being focused on disability only. It was stated that they would prefer to link with CATHSSETA for disability-technical training [HD1; HD2; HD3; HD4 & HD5]. HD1-HD5 concurred that they think this study that engaged the disability sector is the right initiative as they are ready with structured programs that needs hospitality/tourism-stakeholders and CATHSSETA's support.

The major themes emerged as no involvement with CATHSSETA but a willingness to collaborate.

4.2.3.4 Involvement in the sector

a. Input to policies and strategies

In terms of active involvement in the sector's development regarding inputs to policies, development plans and workshops all participants stated their limited involvement but expressed their readiness and willingness to do so from policy to business strategies using different approaches applicable to the hospitality/tourism stakeholders [HD1; HD2; HD3; HD4 & HD5].

The major theme that emerged focused on limited involvement but willingness to provide input.

b. Future of disability inclusion in hospitality-sector skills development

Participants indicated that little has been contributed by the disability sector but they would like to collaborate with both CATHSSETA and hospitality public and private sector towards developing, imparting and co-creating hospitality sub-sector skills that are inclusive of everyone from policy, practice and legislation.

4.2.4 The hospitality sub-sector: An employee perspective

4.2.4.1 Background to the position in the business

The participants were drawn from a variety of hospitality organisations as can be seen in Table 4.6.

Table 4.6: Position and core responsibilities

Position	CODE	RESPONSIBILITIES AND DURATION	QUALIFICATIONS
Cashier	HEe3	Serve customers (2 years)	Grade 12 and inhouse training
Junior assistant manager of a hotel	HEe7	Management responsibilities (4 years)	No qualifications – inhouse training
Head waiter	HEe9	Serving customers (8 years)	Training in events and inhouse training
Head waiter	HEe14	Serving peoples and doing some cleaning (2 years)	Training courses related to barman and waitering
Employee in a restaurant	HEe16	Serving customers (3 years)	Did not indicate
Personal assistant at a hotel	HEe11	All-rounder (5 years)	Did not indicate
Bartender	HEe18	Serves drinks at a restaurant (6 months)	Degree in human movement sciences and a degree in conservation management
Kitchen manager	HEe20	Managing activities related to the kitchen (2 years)	Inhouse training

Employee at a pizzeria	HEe22	Preparing pizzas (4 months)	Did not indicate
Front of house in a restaurant	HEe25	Welcome and placement of customers (3 months)	Training courses related to the work

The participants have vast experience in the conservation sector.

4.2.4.2 Labour-related information

a. Qualifications and training

Regarding the training of the interviewees two major themes emerged namely **limited formal qualifications** (HEe3, HEe7, HEe11) and **in-house training** (HEe3, HEe9, HEe14, HEe20, HEe25). HEe3 completed school and wanted to start working. She completed in-house training. HEe7 does not have any qualification although she studied tourism management but did not complete the qualification. HEe9 has limited training and in a different part of the sector – events. He did however receive in-house training in the coffee shop. HEe11 is a personal assistant (all-rounder) at a hotel for the past five years but has been working at this establishment for 12 years. HEe14 completed training courses related to being a barman and a waiter. HEe18 is well qualified with a degree in Human Movement Sciences and a diploma in nature conservation. HEe20 did not completed any qualifications but did some inhouse training. He has not formal qualifications of training but completed inhouse training. HEe25 does not have formal qualifications but completed training courses related to his work.

The major themes that emerged are limited formal qualifications but in-house training.

b. Appropriateness of qualifications/skills

On the question whether their participants qualifications and skills were adequate one theme emerged namely **adequate training** for the positions interviewees are holding (HEe3, HEe9, HEe18, HEe25). HEe3 stated that she is satisfied with the internal training as it directly relates to the requirements of her position – working with people, handling difficult customers etc. HEe9 indicated that he is satisfied with the training received. HEe11 has no formal qualifications but highlighted the importance of the relevant training with reference to administrative training and time-management training. HEe14 stated that the training directly links with his current position. According to HEe18 qualifications are important as it assists one in knowing what to do. The training was appropriate for HEe25 since it assisted him with management challenges.

The major theme that emerged is adequate training for the position held.

c. Feedback on training and skills

The participants were asked to provide feedback on their training and skills for which two themes emerged **adequate training** (HEe3, HEe25) and **the importance of practical training**. (HEe14, HEe18).

Firstly, participants were **satisfied with the training** received which was in-house in most cases. HEe3 stated that she is satisfied with the internal training. HEe25 is happy with the training and the outcome thereof. HEe14 indicated that the **training was appropriate** and well balanced between theory and practise. Even though HEe18 is not currently in conservation he indicated that it was a good course but there should have been more practical applications. From the time that HEe7 did study she indicated that the qualification was too broad and focused more on public relations and languages than tourism.

The major themes that emerged refers to adequate training and the importance of practical training.

d. Changes in occupations/positions due to COVID-19

The discussions related to changes in occupations and positions resulted in one theme namely **no change in positions, but the functions and responsibilities linked to the positions have changed**. HEe3 stated that her position did not change but she did not work during COVID-19. HEe7 indicated that the way one handles customers changed and one must be cautions in relation to their opinions about COVID-19. The rooms were also cleaned differently and interesting that this way of doing still applies. It was indicated by HEe9 that the coffee shop diversified during COVID-19 and that take-aways were sold. He indicated that it was a challenge to work with a mask. The procedures at the hotel changed (HEe11) and most of these still apply such as the use of sanitisers and distancing. COVID-19 lead to HEe14 giving up his position since the company wanted to down-scale their business activities. HEe18 noted the decrease in tourist numbers which is challenging for businesses relying on the hospitality sub-sector. COVID-19 was not good and HEe20 did not enjoy it to be at home she wanted to work but now it is back to normal. HEe22 is just pleased that everything is back to normal. CEe25 indicated that during COVID-19 they had to retrench people. He indicated that COVID-19 influenced planning and the way planning is done – after COVID-19 costing is done in such a way that one buys just enough stock for the business – processes have been streamlined.

The major theme highlighted that occupations did not change but certain functions did.

e. Critical core skills for the world of work

From previous discussions the importance of skills was highlighted but in this discussion for focus is on the critical core skills needed to work in the hospitality sub-sector. Form the discussion two main themes emerged namely soft skills and personal characteristics.

Firstly, **soft skills** were highlighted as important (HEe7, HEe9, HEe18). According to HEe7 it is important to be computer literate, communicate well and work together in a team. HEe9 indicated that hospitality is important in this sector even if the customers are difficult. HEe9 indicated that as a waiter one needs to give attention to detail and solve problems quickly. HEe18 stated the importance of attention to detail, time management, transparency, soft skills, listening skills and management skills.

Secondly, the importance of **certain personal characteristics** was also noted (HEe20, HEe25). HEe20 stated that honesty, respect and perseverance are important in this sector. HEe25 indicated the importance of customer services and upselling – thus working with people. HEe9 indicated that hospitality is important in this sector even if the customers are difficult.
The major themes highlighted soft skills and personal characteristics.

f. New skills needed to work in the hospitality sub-sector (pre and post COVID-19)

COVID-19 led to changes in the world of work and the needs of the workplace. The discussions led to two major themes namely, becoming an **all-rounder** (HEe14) and **financial skills** (HEe18 and HEe20).

HEe7 indicated no new skills are needed to work in the hospitality sub-sector – it is still the same. HEe14 decided to broaden his own skills and try to become an all-rounder. It is now more important to do financial management (HEe18). HEe20 identified the need to work more with finances, clients and prefer external courses to upskill. HEe22 wants to be a chef since he wants to work with food.

The most important skills that emerged are financial skills and being an all-rounder.

g. Up-skilling of the employee in the hospitality sub-sector

The discussions related to up-skilling resulted in one theme namely the **importance and need for upskilling.** HEe11 indicated that upskilling is done at the hotel – they completed coffee training, first-aid and fire drill training. He would like to do a Barista course. HEe25 stated the importance of doing refreshing courses so that employees do not forget the way of work. Upskilling is important to do the work better (HEe18).

Upskilling is not done at HEe14's employer but it is considered. HEe22 indicated that upskilling is not needed for him anymore as he knows everything about his workplace.

The major theme highlights the importance and need for up-skilling.

4.2.4.3 The future of the hospitality workplace

Regarding the future of work in the hospitality sub-sector the responses were positive revealing two themes namely a need for the services provided by the hospitality sub-sector and

Firstly, there will **always be a need for the services provided by the hospitality sub-sector** (HEe9, HEe18, Hee20, HEe22, HEe25). HEe9 indicated that the sector will continue to grow and that they should provide good food and manage the coffee shop well. HEe18 is positive about the future of the hospitality workplace. HEe20 and HEe22 are unclear about the future of the hospitality workplace but positive. HEe25 is very positive about the future of the restaurant and believes that customer service can set one apart from other restaurants – [HEe25…*because that is most important thing, without a customer you do not have a job*]. Secondly, moving forward certain **scaling-down in the future** (HEe7 and HEe11). HEe7 indicated that given the economic status of people it might become necessary for the workplace to scale down on employees and request those that are staying to work longer hours. HEe11 stated that people learnt to do more with less which might lead to job losses.

With regard to the future of work in the sector different opinions were provided related to **multi-skilling** and the **importance of customer service**. It was indicated by HEe7 that the economy plays a major role going forward. HEe11 stated that one needs to be able to multi-skill and have competencies in several parts of the business. HEe14 indicated that more competition is needed to keep all the companies on their toes. HEe22 indicated that the way clients are handled influences the future of work.

4.3 QUANTITATIVE RESEARCH RESULTS

The quantitative research results are focused on the questionnaires distributed to role-players in the hospitality sub-sector.

4.3.1 Employee responses

4.3.1.1 Employee profile

From the employee profile (Table 4.7) it was evident that respondents were mostly black South African females (70%) between 25 and 34 years of age (40%) or between 35 and 44 years of age (24%) residing in North-West and Western Cape provinces. In terms of qualification the respondents held a Grade 12 certificate and the indicated that they earn the same as an average income (29%) whilst 26% rather not say. Most of the respondents studied at Walter Sisulu University followed by the University of the Free State, the University of Pretoria, UNISA, University of Johannesburg, Durban University of Technology, Tshwane University of Technology and North-West University. There were also a higher number of respondents that completed their Grade 12 certificate as well as those that enrolled at colleges such as South Cape College, Prestige Business College, The International Hotel School and Boston City Campus.

Table 4.7: Employee profile

Demographic characteristic			**Demographic characteristic**	
Age	**Percentage**		**Citizen**	**Percentage**
18-24	17.78%		South African	**95.15%**
25-34	**40.37%**		Foreign national residing in South Africa	4.85%
35-44	**24.44%**		**Race**	
45-54	12.59%		Coloured	12.55%
55+	4.81%		Black African	**65.88%**
Gender	**Percentage**		White	20.78%
Female	**70%**		Indian/Asian	0.78%
Male	26%		**Any form of disability**	
Non-binary	4%		Yes	2.28%
Highest qualification			No	97.72%
Non-formal education	8.40%		**Monthly income**	
General Education (High School)	43.51%		Much below-average income	10.98%
Certificate	18.70%		Below average income	21.96%
Tertiary Diploma	14.12%		Same as average income	29.41%
Bachelor’s Degree	11.07%		Above average income	9.80%
Postgraduate Degree	4.20%		Much above average income	1.18%
Province			Rather not say	26.67%
Limpopo	1.76%		**Platform used to obtain information about the sub-sector**	

Free State	2.82%		Television	13.54%
North-West	**48.94%**		Print media (newspaper/magazine)	11.65%
Northern Cape	0.35%		The internet	**21.98%**
Western Cape	**33.45%**		e-Word-of-mouth (Websites, Facebook, Twitter, Instagram)	15.65%
Eastern Cape	1.41%		Word-of-mouth (friends, work colleagues)	**17.76%**
Gauteng	3.52%		Travel/trade shows	10.54%
Mpumalanga	-		Do not receive any	8.88%
KwaZulu-Natal	7.75%			

In terms of positions most of the respondents are employed in administrative positions, followed by general workers, managers and assistant managers, waiters, cashiers, chefs, cleaners and housekeeping, front office and reception positions and gardeners. They have been working in these positions on average for 42 months (3.5 years). It might be that due to COVID-19 there has been some level of stagnation where less vacancies are available, and people are hesitant to move to another position during these difficult economic times. When searching for information related to the sub-sector they consult either the Internet or hear it from friends and family.

4.3.1.2 Knowledge and skills important to the workplace

a. The importance of certain aspects related to conducting ones' work

Table 4.8: Important of work aspects

Aspects	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
To have the relevant qualification and training	3.52%	4.58%	17.25%	37.68%	36.97%	4.00
To have practical experience before commencing	2.14%	5.69%	21.35%	38.79%	32.03%	3.93
To have a mentor	3.24%	7.91%	19.78%	39.57%	29.50%	3.84
To up-skill yourself	0.71%	2.13%	10.64%	36.52%	50%	**4.33**
Sufficient resources	2.84%	1.77%	15.25%	32.62%	47.52%	**4.20**

The importance of upskilling is evident from the table (4.33) as well as having sufficient resources to conduct the work (4.20). Still important, but least important for this list having a mentor yielded a 3.84 value.

b. Importance of skills and characteristics in doing ones' work effectively

Table 4.9 summarises the skills considered to be important by employers.

Table 4.9: Importance of skills related to effective work

Skills	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Customer service skills	0.34%	1.38%	7.93%	21.72%	68.62%	**4.57**
Networking skills	0.35%	7.37%	19.30%	36.14%	36.84%	4.02
Verbal communication skills	0.35%	0.70%	4.56%	26.67%	67.72%	**4.61**
Written communication skills	0.35%	4.59%	16.25%	33.22%	45.58%	4.20
Flexibility skills	0.35%	1.05%	17.89%	30.18%	50.53%	4.30
Organisation skills	0.71%	2.85%	15.30%	32.03%	49.11%	4.26
Language skills	0.35%	1.38%	11.76%	33.56%	52.94%	4.37
Commitment	0.35%	2.44%	8.71%	27.53%	60.98%	4.46
Can-do attitude	5.65%	3.18%	10.60%	22.61%	57.95%	4.24
Multi-tasking skills	0.76%	3.79%	9.85%	29.55%	56.06%	4.36
Cultural awareness	2.15%	4.30%	27.96%	29.39%	36.20%	3.93
Technology skills	1.81%	9.42%	24.28%	27.17%	37.32%	3.89
Empathy and emotional intelligence	1.09%	3.28%	20.80%	29.93%	44.89%	4.14
Teamwork	0.70%	1.05%	7.02%	24.21%	67.02%	**4.56**
Stress management	2.86%	2.14%	15.36%	31.43%	48.21%	4.20
Time management	0.71%	0.36%	8.54%	25.62%	64.77%	**4.53**
Problem-solving	0.35%	1.06%	12.32%	30.63%	55.63%	4.40
Listening skills	0.35%	0.35%	8.87%	24.11%	66.31%	**4.56**
Digital skills	1.07%	7.12%	24.20%	29.18%	38.43%	3.97

From the skills list it was clear that verbal communication skills were rated highly (4.61), followed by customer services skills (4.57), teamwork (4.56), listening skills (4.56) and time management skills (4.53). The least important skills in the view of the respondents were technology skills (3.89) and cultural awareness skills (3.93).

c. Importance of certain characteristics in doing ones' work effectively

Table 4.10 summarises the importance of personal characteristics.

Table 4.10: The importance of personal characteristics

Skills	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Responsible	0.35%	-	10.92%	32.75%	55.99%	**4.44**
Enthusiastic	0.36%	2.51%	15.05%	36.05%	45.52%	4.24
Dedicated	-	0.35%	12.37%	33.92%	53.36%	**4.40**
Precise	-	3.97%	16.61%	32.13%	47.29%	4.23
Creative	2.86%	3.57%	19.64%	30.36%	43.57%	4.08
Innovative	-	2.90%	20.65%	32.25%	44.20%	4.18
Independent	1.78%	6.25%	18.86%	30.60%	42.70%	4.06
Sensitive	6.79%	12.50%	22.50%	22.14%	36.07%	3.68
Professional	0.70%	1.41%	5.99%	19.72%	72.18%	**4.61**

On a personal note, respondents indicated the importance of being professional (4.61), responsible

(4.44) and dedicated (4.40). The least important skill were listed as being sensitive (3.68).

4.3.1.3 The new world of work in the hospitality sub-sector: Changes in the workplace because of COVID-19

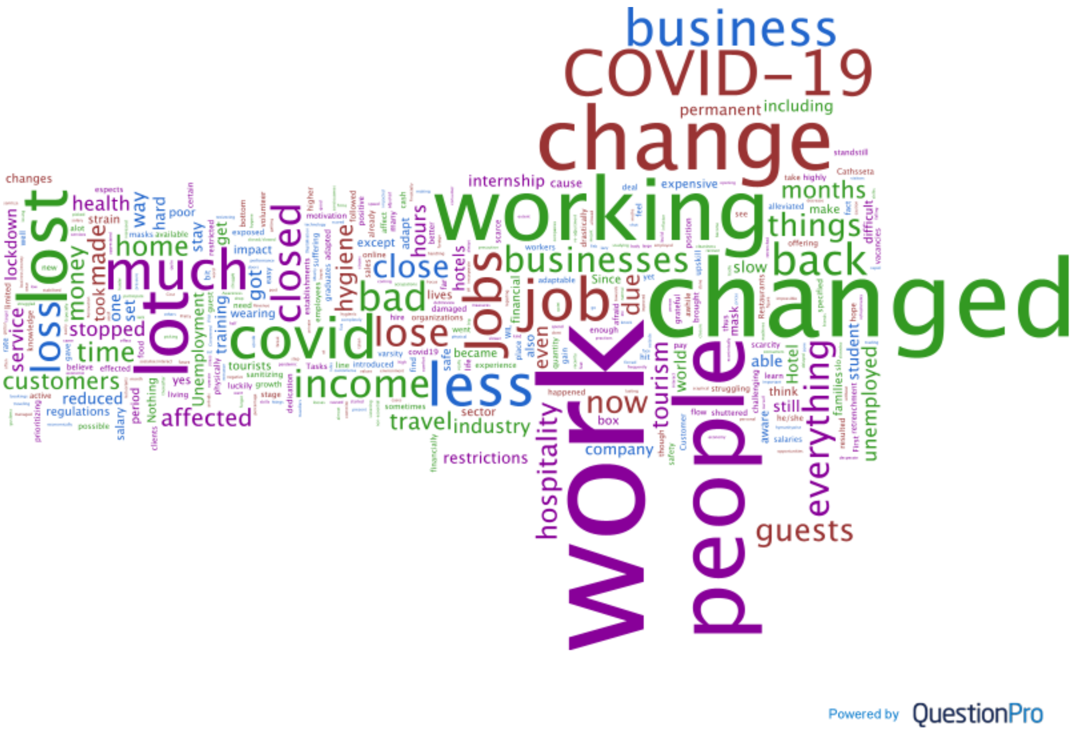


Figure 4.7: Wordcloud for changes in the workplace because of COVID-19

It is evident (Figure 4.7) from the Wordcloud related to changes in the workplace that the words work/working (58 counts), changed/change (49 counts), people (24 counts) represent the highest counts. Respondents thus recognise the changes that took place due to COVID-19. Respondents indicate the following as changes:

- No changes were experienced in the workplace
- Salary reductions
- Job losses
- Move from permanent to part-time positions
- Could not do work-integrated learning
- Lack of vacancies made it difficult to find work
- People became lazy
- Had to think out of the box / “took me out of my comfort zone”
- Could do some of the work from home
- Less visitors, less work
- Technology empowerment

4.3.1.4 Development of jobs in this sub-sector in the next few years

Figure 4.8: Wordcloud for the development of jobs in this sub-sector

The word cloud (Figure 4.8) indicated that yes (22 counts), jobs (21 counts), sector (15) and growing (13) were most mentioned by respondents. Respondents indicated that jobs will develop in the following lines:

- Move towards digital
- Equipment will improve
- New jobs are dependent on training
- Jobs are becoming more specialised and experience orientated
- Increase in skilled people

4.3.1.5 Development of new jobs in the hospitality sub-sector

Figure 4.9: Wordcloud for the development of new jobs in this sub-sector

An overwhelming 85 counted (Figure 4.9) related to the word yes was evident, this was followed by jobs (11 counts). A significant number of respondents also indicated that there will be no new jobs. Those that indicated a positive respondents identified the following related to new jobs:

- Multi-skilling will become more important
- Positions related to travel insurance will become more specialised
- Knowledge and positions related to social media
- IT and computer related jobs

4.3.1.6 Long-term employment and opportunities available in the hospitality sub-sector

Figure 4.10: Opportunities available in the sub-sector and long-term employment

On a positive note, the word yes yielded 147 counts indicated that the respondents want to work in this industry over the long term (Figure 4.10).

For those that indicated yes, the following opportunities were identified:

- The culinary experience is growing
- Enjoy working with people and contributing to their growth
- Hospitality offers different opportunities and one can move around between different departments
- There are opportunities for promotion
- There is a need to learn more about the sector
- Gaining experience to open a business in the sector
- Wanting to move into management positions
- Enjoy working in the sector
- Love the job and love working with people

For those that indicated not, the following reasons were given:

- The sector hires unqualified people and those with the qualifications do not get the work
- The working hours are too long
- There are no other jobs, so this was the only option
- The salaries and wages are too low

Overall, respondents gave a positive response in terms of working in this sub-sector but a number of respondents indicated inhibiting factors such as working hours and low salaries.

4.3.1.7 Aspects to improve in the workplace on a personal level

Figure 4.11: Aspects to improve in the workplace on a personal level

Again (Figure 4.11) there was an overwhelming number of respondents with 99 counts for the work yes indicating that there are some aspects that employees want to improve on a personal level.

The respondents indicated a need to improve the following aspects:

- Training in communication, teamwork, technology, problem solving and consumer services
- Want to become part of the management team
- There is a need for self-improvement
- Up-skilling remains important
- Improvement of salaries

4.3.2 Employer responses

The quantitative research results are focused on the questionnaires distributed to employers in the hospitality sub-sector.

4.3.2.1 Employer profile

Table 4.11 summarises the employer profile.

Table 4.11: Employer profile

Employer demographic characteristic			Demographic characteristic	
Age	**Percentage**		**Citizen**	**Percentage**
18-24	4.92%		South African	95.00%
25-34	11.48%		Foreign national residing in South Africa	5.00%
35-44	26.23%		**Race**	
45-54	29.51%		Black African	18.97%
55+	27.87%		White	63.79%
Gender	**Percentage**		Coloured	10.34%
Female	**37%**		Indian/Asian	6.90%
Male	29%		**Any form of disability**	
Did not say	34%		No	93.44%
Highest qualification			Yes	6.56%
Non-formal education	6.67%		**Monthly income**	
General Education (High School)	28.33%		Single (never married)	26.23%
Certificate	16.67%		Married	60.66%
Tertiary Diploma	16.67%		Domestic partnership	3.28%
Bachelor's Degree	15.00%		Widowed	4.92%
Postgraduate Degree	16.67%		Divorced	3.28%
Province			Separated	1.64%
Limpopo	2.74%		**Platform used to obtain information about the sub-sector**	
Free State	4.11%		Television	9.20%
North-West	32.88%		Print media (newspaper/magazine)	12.07%
Northern Cape	0.00%		The internet	28.16%
Western Cape	43.84%		e-Word-of-mouth (Websites, Facebook, Twitter, Instagram)	22.41%
Eastern Cape	2.74%		Word-of-mouth (friends, work colleagues)	16.09%
Gauteng	5.48%		Travel/trade shows	11.49%
Mpumalanga	2.74%		Do not receive any	0.57%
KwaZulu-Natal	5.48%			

From the employer profile it was evident that respondents were mostly white (63.79%), South African (95%) females (37%) between 45 and 54 years of age (29.51%). Most employers indicated possessing a general certificate as their highest qualification (28.33%) and were based in the Western Cape (43.84%) and North-West provinces (32.88%) provinces respectively. In terms of those with qualifications, the most cited institutions included University of the Free State, Nelson Mandela University, the University of South Africa, the University of Pretoria and the North-West University. In terms of positions, most of the respondents are employed in managerial positions, followed by owners and assistant managers. Most have been working in these positions on average for more than 5 years. When searching for information related to the sub-sector, they primarily consult the Internet.

4.3.2.2 Business Profile

Table 4.12 summarises the business profile of respondents.

Table 4.12: Employer business profile

Business characteristics	
Annual turnover of your business in 2021	**Percentage**
R500 000	17%
R1.5 million	11%
R3 million	8%
+R3 million	22%
Annual turnover of your business in 2022	**Percentage**
R500 000	20.00%
R1.5 million	20.00%
R3 million	16.67%
+R3 million	43.33%
Business Size (by Employees)	**Percentage**
Small: 0 - 49	70.15%
Medium: 50-149	19.40%
Large:150+	10.45%
Participation in CATHSSETA initiatives	**Percentage**
Yes	35.59%
No	64.41%

Most of the businesses surveyed reported turnover of over R3 million in 2021 (22%) and 2022 (43%), respectively, possibly indicating a recovery trend post-the-crisis. Employers were mostly small businesses by employee numbers (70.15%), with a significant proportion of them not participating in any CATHSSETA initiatives.

4.3.2.3 Knowledge and skills important to the employers in the workplace

a. The importance of certain aspects related to skills expected by employers

Table 4.13 summarises the important aspects of work.

Table 4.13: Importance of certain aspects related to conducting one's work

Aspects	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Customer service skills	-	-	4.17%	9.22%	86.11%	**4.82**
Networking skills	1.39%	8.33%	25%	27.78%	37.50%	3.92
Verbal communication skills	-	-	2.78%	19.44%	77.78%	**4.75**
Written communication skills	1.39%	5.56%	20.86%	23.61%	48.61%	4.13
Flexibility skills	-	2.78%	22.22%	19.44%	55.56%	4.28
Organisation skills	-	2.78%	13.89%	27.78%	55.56%	4.36
Language skills	-	1.41%	19.72%	19.72%	59.15%	4.37

Commitment	-	-	5.56%	22.22%	72.22%	4.67
Can-do attitude	-	1.39%	6.94%	20.83%	70.83%	4.61
Multi-tasking skills	1.39%	1.39%	12.50%	25.00%	59.72%	4.40
Cultural awareness	-	4.11%	23.29%	27.40%	45.21%	4.14
Technology skills	-	5.48%	32.88%	32.88%	28.77%	3.85
Empathy and emotional intelligence	1.39%	-	20.83%	33.33%	44.44%	4.19
Teamwork	-	1.39%	5.56%	13.89%	79.17%	**4.71**
Stress management	1.41%	-	12.68%	29.58%	56.34%	4.39
Time management	-	-	9.72%	23.61%	66.67%	4.57
Problem-solving	-	1.39%	8.33%	22.22%	68.06%	4.57
Listening skills	-	-	9.72%	18.06%	72.22%	4.63
Digital skills	-	8.35%	27.78%	27.78%	36.11%	3.92

The importance of customer service skills is evident from the table ($\bar{x}$=4.82) as well as verbal communication skills ($\bar{x}$=4.75). Still important, but least important for this list is technology skills which yielded a mean value of 3.85.

b. Most important consideration when employing someone

Figure 4.12: Wordcloud for important consideration when employing someone

In Figure 4.12, it is evident from the Wordcloud related to employers' considerations that required skills are the most prevalent consideration (17 counts), followed by team (7 counts), as well as attitude, communication and personality (6 counts each). Respondents thus consider the following:

- Dedication, honesty, loyalty, willingness
- A team player, commitment, multi-tasking skills
- The right personality
- Experience is key
- Communication, Commitment
- Skills and Commitment

- Understanding of Job and communication
- Good interpersonal relations, teamwork, motivation, communication, independence, honesty, good attitude,and general skills
- Qualifications, people/customer skills
- Human skills
- Customer skills and multi-tasking

It is evident that soft-skills are critical to employers in the hospitality sub-sector, particularly aspects such as communication and customer skills, personality traits such as good attitude and qualifications.

4.3.2.4 Business changes due to COVID-19

Figure 4.13: Wordcloud for changes in the workplace because of COVID-19

It is evident from the Wordcloud related to changes in the workplace that COVID-19 affected businesses (14 counts), staff (6 counts), and clients (4 counts) which represent the highest counts. Respondents thus recognise the changes that took place due to COVID-19. Respondents indicate the following as changes:

- More takeaways; buffet was stopped, advertise on Facebook and WhatsApp, food is now expensive due to load-shedding, new menu daily
- Hard to retrieve business, always to adapt to new planning and strategies
- Significant financial impact
- Business stood still

- Huge loss
- Revenue hasn't recovered
- More hygiene conscious. Cleanliness on yourself, cleanliness in sections.
- Business is slow, one cannot plan 3 months ahead as all bookings are what we call ''short lead time bookings''
- Training model adapted and virtual training offered

The pandemic instigated changes in the hospitality sub-sector. Despite job and income losses, there are some green shoots based on paradigm shifts such as technology adoption.

4.3.2.5 Occupations/jobs evolving in your sector. New types of occupations/jobs developing in this sector in the next few years

Figure 4.14: Wordcloud for the occupation evolution in the sub-sector

Illustrated in Figure 4.14, the word yes yielded (7 counts) and jobs (6 counts), Respondents indicated that jobs will develop in the following lines:

- Need for jobs but costs are too high to create jobs
- New employees improved exceptionally well due to teaching them new skills
- Internet based marketing
- Not sure still recovering from COVID
- Training in-house
- Small development and the sector is promising

- Depending on the recovery rate
- Not really excepts for the ones that are already existing
- Perhaps in marketing area, social media, online presence
- Moving to digital jobs
- Sustainability Manager/Officer position due to the increasing workload of monitoring and reporting on our sustainability
- Using technology and app-based tools, the need for IT personnel
- There are lack of qualified chefs and Chefs that embrace technology
- Digital marketing
- Technical skills

There is a keen sense that the evolution of the hospitality sub-sector is predicated on the assimilation of new skills in the sector. Employers acknowledge this, citing digital and technical skills in roles such as social media, digital marketing and IT roles.

4.3.2.6 The future of the hospitality sub-sector in South Africa

Figure 4.15: Wordcloud for the future of the hospitality sub-sector in South Africa

Respondents indicated the importance of people (7 counts) to the future of the hospitality sub-sector. There is a good (6 counts) outlook on the sector. A significant number of respondents also indicated growth (6 counts). Those that indicated positive respondents identified the following the future of the sector:

- If hospitality receives more acknowledgement there will be a bright future
- Good, with no load-shedding and no ANC
- Growing
- Positive growth in the country and s few selected provinces
- Growth and great employer of South Africa

Respondents are overall positive about the future of hospitality, albeit the challenges cited that include load-shedding and political issues.

4.3.2.7 Scope of business

Figure 4.16: Wordcloud for the Scope of business

Key words extrapolated suggest respondents were in accommodation (13 counts), catering and restaurant (7 counts), and training (6 counts).

Scope of business response was a follows:

- Accommodation, catering, conferencing, Functions, Weddings
- Accommodation
- Hospitality and catering
- Guesthouse
- Entertainment and events
- Bistro

- Food, beverage, functions and events
- Viticulture and winemaking, with sales and tasting to the public
- Hospitality students are trained
- Safari hospitality business offering luxury accommodation and activities to international and local guests
- Game lodge on a private concession in the Kruger National Park, providing accommodation, meals and activities (game drives and walks)
- Training in the Hospitality & Tourism sectors
- Fish & Chips take-a-away chain
- Restaurant franchise group
- Luxury game lodges
- Enjoy working with people and contributing to their growth

Overall, respondents and their scope of business represent the broad spectrum of the hospitality sub-sector.

4.3.2.8 Participation in CATHSSETA initiatives

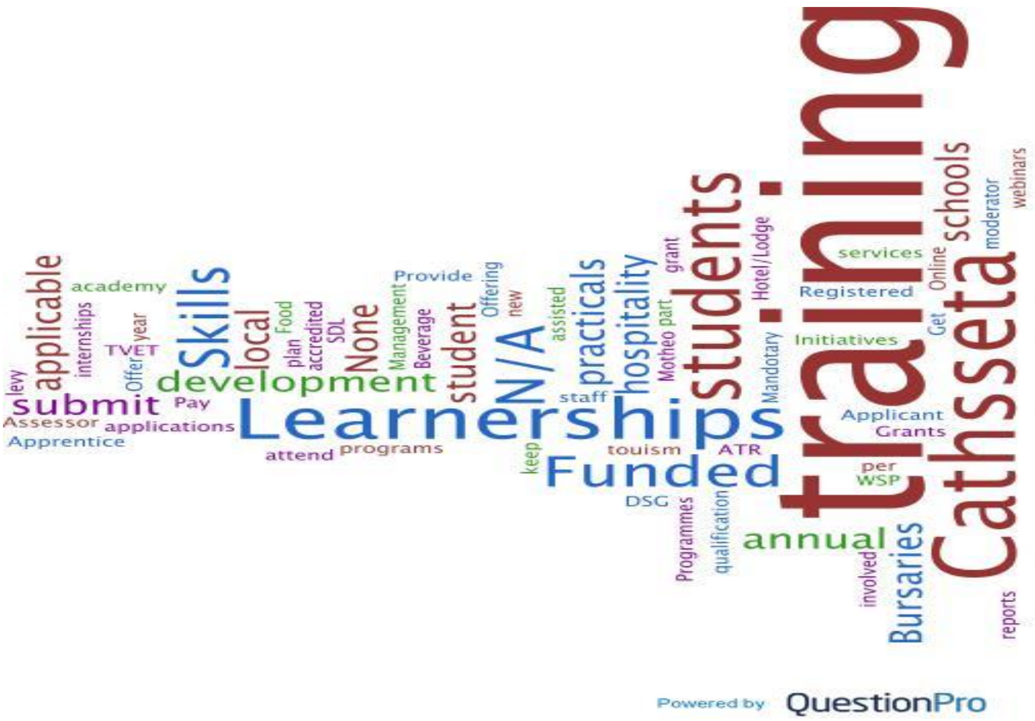


Figure 4.17: Wordcloud for the participation in CATHSSETA initiatives

The words training (10 counts), learnerships (4 counts) and students (4 counts) indicate extent of participation of respondents in CATHSSETA initiatives as employers. The respondents indicated the following aspects:

- Get students for training from local schools or hospitality schools to do practical
- Provide student internships
- Training students
- Food & Beverage services Offering student training
- Mandatory Grants
- Our training is accredited with CATHSSETA
- We have our own training academy Apprentice Learnerships Bursaries Skills programs
- We attend webinars and have assisted with the development of the new Hotel/Lodge Management qualification
- Pay skills levy and submit an annual training plan
- We submit annual WSP and ATR reports to CATHSSETA as part of our training and development of our staff
- DSG Applicant, Registered Assessor and moderator with CATHSSETA

Respondents indicate that they are aware of some CATHSSETA initiatives and participate primarily in leadership and providing students with practical skills via experiential learning.

4.3.2.9 Involvement in discussions related to policies

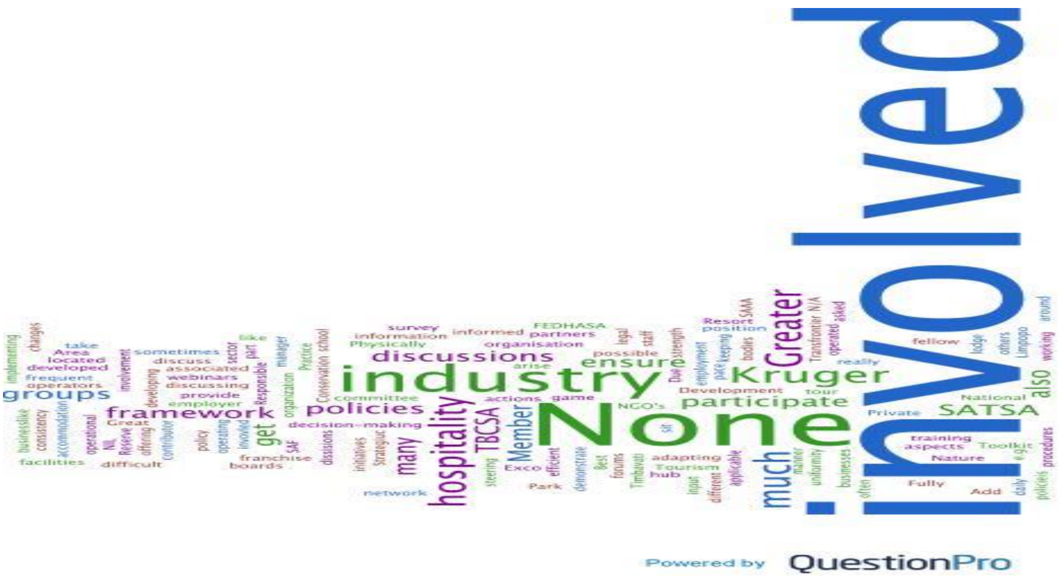


Figure 4.18: Wordcloud for the involvement in sector related to policies

Most respondents indicated no participation in sector policy formulation processes. However, some did, thus the word involved with 18 counts and none with 8 counts. Respondents indicate that:

- Most hospitality businesses do not get involved in discussing policies - we only get informed about the changes
- Not involved
- No involvement
- None, we are a franchise
- We are involved in the framework associated with the Greater Kruger National Park and the Great Limpopo Transfrontier Conservation Area
- Discussions with employer organization and TBCSA
- Due to the having our own training school we are involved in many different aspects of the industry and sit on many boards, forums and information groups
- We are involved through FEDHASA
- Not involved much around policy, but we are a contributor to the network of the game lodge sector of the industry and we participate with industry bodies like SATSA and TBCSA

While most respondents were not involved in policy formulation, those that were indicated that they do so mainly through their federations or associations which include FEDHASA, SATSA and TBCSA.

4.3.3.10 Sector organisations and association membership

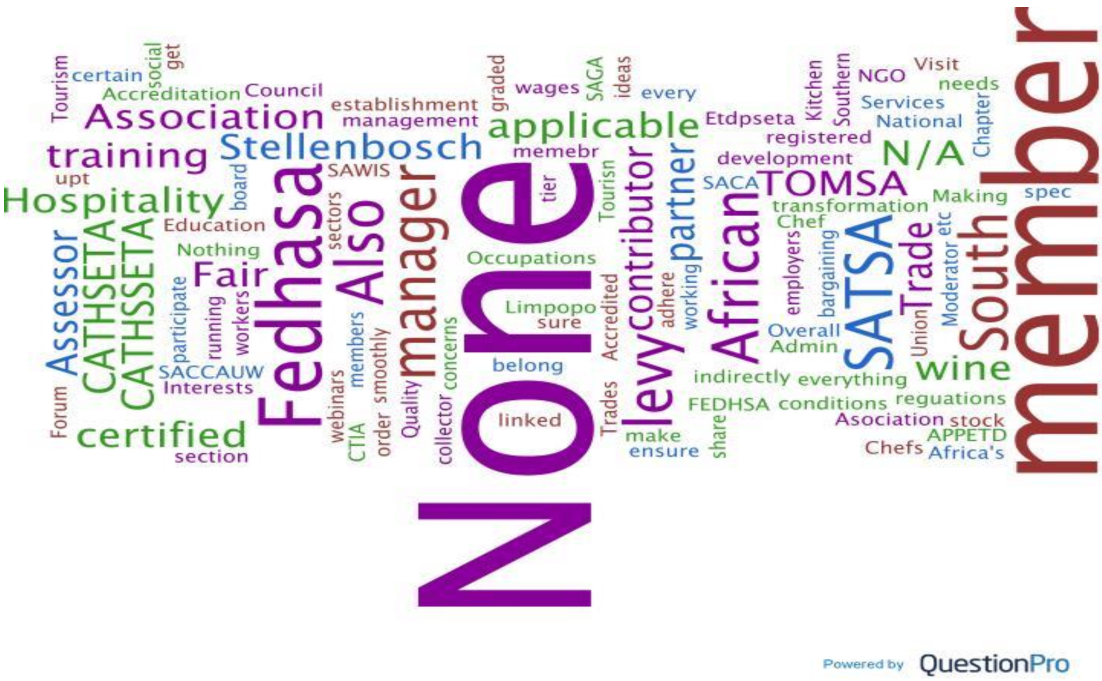


Figure 4.19: Wordcloud of sector organisations and association membership

The prevalent words from the Wordcloud are none (11 counts) and member (7 counts). Individual responses suggest no membership, However, those that indicated membership indicated:

- None
- Hospitality
- South African Chefs Association/ South Africa's Education Forum/ Quality Council for Trades & Occupations
- SAWIS
- Union - SACCAUW
- As an NGO we belong to Visit Stellenbosch, and we are their social development partner. We are also indirectly linked through training partner CTIA
- Southern African Tourism Services Association (SATSA) - Limpopo Chapter
- FEDHASA
- SATSA and Fair-Trade Tourism.

a. Additional thoughts

Figure 4.20: Wordcloud of Additional thoughts of respondents

When solicited for any additional thoughts, the Wordcloud indicates words such as sector (12 counts), tourism (7 counts) and local (5 counts). Some key responses however included,

- The need to pay good staff wages
- Negative effect of the economy and loadshedding on business

- Infrastructure challenges, including roads and security
- Unemployable labour due to the lack of ability in basic subjects like maths and English as employers would prefer to hire people from our local communities
- Foreign tourists are becoming easy targets for criminals, once our country gets a bad name tourism will suffer.
- Government must be engaged to educate South Africans on the importance of tourism and the potential to employ or young job seekers.
- Formal qualifications are nice, but the most important attributes are personal ones, you can teach skills but you can't teach attitude.
- The tourism sector in South Africa is extremely diverse and not fully understood by policy makers and government. The sector strategies should be looked at in a more granular way by dividing the sector into more manageable categories
- The diversity of the tourism sector makes it a complex sector to apply broad strokes policies to and, therefore, deeper engagement with the private sector in each of the myriad of sub-sectors should be more positively sought by government bodies and policy makers.
- The holistic development and transformation of persons with disabilities and persons who are under employed by rendering accredited training and work placement services to them through the following activities
- To provide education and training services to persons with disabilities order to promote their economic, independence, human dignity and self-realisation
- To conduct any fundraising activities in order to obtain financial and other support to develop, promote and extend the Company’s objectives.

4.4 DISCUSSION OF THE RESULTS

The results of the interviews were captured in the previous section. In the following section attention is given to the integrated discussion of the results from the qualitative and quantitative results.

4.4.1 Employee and employer profile

From the employee profile it was evident that respondents were mostly black South African females (70%) between 25 and 34 years of age (40%) or between 35 and 44 years of age (24%) residing in North-West and Western Cape provinces. In terms of qualification the respondents held a Grade 12 certificate and the indicated that they earn the same as an average income (29%) whilst 26% rather not say. Most of the respondents studied at Walter Sisulu University followed by the University of the Free State, the University of Pretoria, UNISA, University of Johannesburg, Durban University of

Technology, Tshwane University of Technology and North-West University. There were also a higher number of respondents that completed their Grade 12 certificate as well as those that enrolled at colleges such as South Cape College, Prestige Business College, The International Hotel School and Boston City Campus. In terms of positions most of the respondents are employed in administrative positions, followed by general workers, managers and assistant managers, waiters, cashiers, chefs, cleaners and housekeeping, front office and reception positions and gardeners. They have been working in these positions on average for 42 months (3.5 years). It might be that due to COVID-19 there has been some level of stagnation where less vacancies are available, and people are hesitant to move to another position during these difficult economic times. When searching for information related to the sub-sector they consult either the Internet or hear it from friends and family.

From the employer profile it was evident that respondents were mostly white (63.79%), South African (95%) females (37%) between 45 and 54 years of age (29.51%). Most employers indicated possessing a general certificate as their highest qualification (28.33%) and were based in the Western Cape (43.84%) and North-West provinces (32.88%) provinces respectively. In terms of those with qualifications, the most cited institutions included University of the Free State, Nelson Mandela University, the University of South Africa, the University of Pretoria and the North-West University. In terms of positions, most of the respondents are employed in managerial positions, followed by owners and assistant managers. Most have been working in these positions on average for more than 5 years. When searching for information related to the sub-sector, they primarily consult the Internet. Most of the businesses surveyed reported turnover of over R3 million in 2021 (22%) and 2022 (43%), respectively, possibly indicating a recovery trend post-the-crisis. Employers were mostly small businesses by employee numbers (70.15%), with a significant proportion of them not participating in any CATHSSETA initiatives.

The effect of COVID-19 is evident in the responses of the participants (Table 4.13). The pandemic influenced the running of hospitality business and changed the business models as it has been applied. The hospitality sub-sector was closed for some time and could only operate with permission. However, initiatives were taken by serving take-away food and even frozen food to the customers. Unfortunately, many people lost their jobs and the hospitality business had to do more with less staff which seems to be continuing currently – this has a significant effect on the number of job opportunities available. The use of technology such as self-check in systems streamlined thus business but also negatively influences job opportunities.

Table 4.13: Understanding the status of the hospitality sub-sector

EMPLOYER VOICE			EMPLOYEE VOICE
Changes in the sub-sector	**Economic performance of the sub-sector**	**Challenges in growing the sub-sector**	**Changes to the workplace**
• Changes in business models • The importance of the South African market • Changes in consumer behaviour • Financial challenges and constraints • Financial effect • Hard to retrieve business • Business is slow	• Potential for economic growth in the hospitality sub-sector • Limited by financial constraints • External factors influencing economic growth.	• Competition • The effect of rising costs and financial challenges • Operational challenges	• Salary reductions • Job losses • Move from permanent to part-time positions • Technology empowerment

The hospitality also deals with a "new" customer whose behaviour changed. Pre-COVID-19 people make bookings well in advanced and planned their trips and holidays meticulously. However, with the uncertainty experienced in the last few years customers tend to make last minute bookings as if they want to make sure that the trip can continue – the creates uncertainty for the industry now know for sure what their occupancy will be in an upcoming week. Both businesses and visitors lost money during COVID-19 and given the economic circumstances the customer holds on to his money before making a booking – this creates challenges for the sector. It is however important that the sector is prepared for the changed customer and handle them differently. It was also realised that customers want to explore, get out of their houses which creates opportunities for the hospitality sub-sector. The South African market showed their resilience over the last two years with their support for local businesses and products. This is an opportunity to be exploited by the sector not only now but also for the long-term. Taking the current economic conditions into account is also important.

One cannot review changes in the sector without discussing the financial challenges and constraints experienced by the hospitality sub-sector. The effect of a complete lockdown is devastating, and those losses cannot be recovered. The sector has not fully recovered and is still subjected to factors such as seasonality, smaller events and economic difficulties. One should optimise the opportunities that reveals itself with every phase of the recovery process. The employers are however positive about the economic performance outlook of the sector and are aware of the need for people to utilise the services and offerings of this sector taking into account customers limited budget. Eating out and staying over in accommodation for the purposes of leisure is not a necessity. Added to this the sector are worried about factors beyond their control such as load shedding, limited support from the government, costs of labour, raw products and the effect of inflation, which pose as a serious threat to the sectors development and growth.

The majority of the participants highlighted the influence of the competition and that it is not enough to be average today. One needs to stand out amongst the competition to be chosen by the consumer – this adds significant pressure to the current offerings of the hospitality sub-sector. The latter points to the delivery of quality service for which training can be offered to the sector, especially with the new customer in mind. It was clear that the hospitality sub-sector is facing a number of challenges of which some they can control, and some are beyond their direct control, but their positive outlook is encouraging.

Table 4.14: Education and training related to the hospitality sub-sector

EMPLOYER VOICE	EMPLOYEE VOICE	ACADEMIC VOICE
		Changes in the educational landscape
		• Changing student profile • Changing content of programmes • Influence of technology • Keeping up with changes
Types of qualifications and importance aspects when employing a person	**Qualifications and training and appropriateness of these**	**Qualifications**
• Experience is critical • Qualifications are needed for selected positions • Dedication • Honesty • Loyalty • Teamplayer • Right personality	• Limited formal qualifications • Significant in-house training • Link between training and a specific position and organisation	• Towards offering experiential post-graduate qualifications • Soft-skills • Technical skills
Skills and characteristics	**Skills and characteristics**	**Skills and characteristics**
• Critical and creative thinking, • Health and safety awareness • Trustworthiness • The right personality • Customer services • Verbal communication	• Soft skills • Personal characteristics • Financial skills • All-rounder • Verbal communication skills • Customer service • Teamwork • Listening • Time management	• Leadership • Critical thinking • Problem-solving • Resilience • Soft-skills

	• Professional • Responsible • Dedicated	
Up-skilling	**Up-skilling**	**Curriculum changes**
• Need and necessity for internal and external training.	• Importance of and the need for up-skilling	• Need for occupation-specific skills and qualification curriculum • Soft-skills • Move towards experiential learning
		Role of the Department of Higher Education in the development of programs
		• Praise • Frustration

It is important that there is harmony between the education offering by academic institutions and what is needed to work in the hospitality sub-sector. From the academic point of view (Table 4.14), it was interesting to hear that there is a need to change programmes and adapt to the changing need of the industry. In the same line the cumbersome processes to make changes put the academic in a reactive position whereas these institutions should be proactive in their academic offerings. The pandemic clearly sped up the application of technology at training institutions which creates opportunities for new developments. However, in the process of teaching online the development of certain soft skills was left behind due to the medium not lending itself to the development of these skills. Significant investment will be needed here. The profile of students is changing with more black female students that studied towards a qualification in the hospitality sub-sector – this is a positive transformation picture. It was also mentioned that it is difficult to keep these candidates as they are in demand. Regarding content changes of programmes there is a need for more localised content to suit the needs of the sector in South Africa – this might bring a unique flavour to the offering by the industry and improve their competitiveness.

The views around qualifications amongst the different stakeholders were very similar. For the hospitality sub-sector it was clear that certain positions, higher in the sector, requires qualifications but that there are lower-level positions that do not require any training to enter the sector. For these candidates in-house training is offered. The importance of experiential training as part of a qualifications was highlighted by most stakeholders. The fact that potential employees can enter the sector without any qualifications is both an opportunity and career limiting. It is an opportunity to enter the work-of-work but only completing in-house training does not open opportunities to other organisations which might require more formal qualifications – thus many employees stagnate at a specific organisation and in a specific position. External training is important as it broadens the world of the employees can create more opportunities.

In all the discussions the importance of skills for the hospitality sub-sector was mentioned. Some stakeholders consider skills more important than qualifications for certain positions. Even though the topic of skills were asked it seems that certain personal characteristics are also important when working in the hospitality sub-sector. With regard to skills the importance of critical thinking and problem-solving were evident and it is required that these employees must be able to think on their feet. Soft-skills play a major role in the hospitality sub-sector and needs in-depth training. Added to the skills it was clear that one needs to have certain personal characteristics to flourish such as trustworthiness, outgoing personality, someone that want to work with people and can put themselves and their needs second to that of the customer. Although all stakeholders support in-house training the importance of up-skilling was also noticed – this relates to both internal and external training but again internal training seems to be stronger. This is a significant gap that can be addressed the CATHSSETA.

Table 4.15: Understanding the workplace

EMPLOYER VOICE	EMPLOYEE VOICE	ACADEMIC VOICE
Types of occupations in the hospitality sub-sector	**Changes in occupations in the hospitality sub-sector**	**Changes in occupations in the hospitality sub-sector**
• More value is placed on skills than on positions • Opportunities for a variety of occupations • Need for jobs but the cost to create them are too high • More internet-based marketing and more digital positions • Dependent on the recovery rate	• Occupations are the same, but functions and responsibilities changed • Move towards digital • Equipment will improve • Jobs are more specialized • New jobs will require multi-skilling • Travel insurance might bring new jobs	• Multi-skilling • The application of technology • Occupations becoming more entrepreneurial
Readiness of students/learners to enter the workplace	**Long-term employment**	**Attractiveness of the workplace**
• Future employees are not ready to enter the sector • Experience will improve the readiness of future employees	• Positive about long-term employment because of the passion for the sub-sector • There are opportunities for growth • Want to move to management positions	• More attractive on higher levels in the sector
Challenges in the labour market		**Challenges in the labour market**
• Workplace challenges • Motivation of new employees to work in the sector is questioned		• Importance of experiential learning • Investment in skills training.
		Changes in labour profile

		• Glass ceiling for females • The need to train 21st Century soft skills
Future of work in the hospitality sub-sector	**Future of work in the hospitality sub-sector**	**Future of work in the hospitality sub-sector**
• Positive outlook on the sector • Providing a quality service • Deal with inhibiting factors for growth • More acknowledgement of the sector will result in a bright future • It is growing • Limit the effect of politics	• Always a need for the services provided by the hospitality sub-sector • Scaling-down in the future • Multi-skilling • Importance of customer service • Nee training in communication, teamwork and technology • Want to be part of the management team in the future	• Limited government intervention • Improved access to education.
		Towards professionalisation
		• Support for professionalisation

The results related to the workplace (Table 4.15) revealed the following findings. The employers valued skills more than positions and occupations. It is more important to employers that employees can do specific things for example service the customer in the restaurant than dealing with strategic matters. Probably the bulk of positions in the hospitality sub-sector require specific skills. It was however, noted that this sector provides opportunities for a variety of occupations at different levels. The employees indicated that their occupations remained the same but that their roles and responsibilities changed after COVID-19 which is related to less employees working in the business as well as the influence of technology. With less employees working in the sector it became more important to be multi-skilled and able to assist with various tasks.

From an academic point of view the influence of technology in future occupations was highlighted which was also influenced by the pandemic. The question is now whether academic institutions are ready to incorporate such technology in their curriculums so that it can benefit the students and the workplace. The academics emphasised the importance of training students to be entrepreneurial in what they do – this country needs more people that can create their own businesses and, in that way, provide job opportunities for others.

The employers stated that the students and learners are not ready to enter the sector as they lack practical experience. This is often because every product owner has different skills required connected to their operations and could add to the perception that graduates are not ready. Added to that they also currently lack soft-skills, normally developed through face-to-face interactions. In most cases students need additional inhouse training to get the new employee on par with the organisation. It is needed to unpack the inhouse training to determine whether these courses are tailor-made to the characteristics and way of work of the organisation or whether these courses are focusing on skills and content that should have formed part of formal qualifications. This can assist academic institutions in tailoring offerings to address the needs of the industry. When reviewing the attractiveness of the hospitality it was stated that it is not attractive at the lower levels due to poor salaries but also an over-supply of potential employees of which some does not fit the requirements of the sector. If South Africa is serious about the contribution of this sector to the economy, it is time that basic entry requirements are set for different occupations in the sector. The effect of programmes such as Master Chef has assisted in improving the attractiveness of this sector as an employer.

From an employer perspective several challenges were noted related to the labour market. Again, the issue of a lack of experience was noted here by employers and academics and also that the pool of adequate people that want to work in this sector is decreasing. It is not about passion anymore but just about having a job. If this is the attitude it will show in the interaction with customers and tourists which affects the image and brand of South Africa as a tourism destination negatively. From the academic point of view there was a recommendation that the Government should invest in in-depth skills training for this sector as that will improve service levels but also provide employees with some form of skills training that will assist in climbing the career ladder. It was mentioned that the labour profile is changing but that women reach a class ceiling in the sector. This is also a reason for some of them to leave the sector.

Even though there are several aspects to address there is a positive outlook on the sector by employers. These employers are thus still focused on building their businesses and service customers as well as possible. Emphasis was placed on providing a quality service as that will be an important factor in customer decisions. The sector as aware of creating unique experiences to win over the customer. This is also an opportunity to address by providing online courses to address service quality. On the other hand, the sector is aware of the effects of load shedding, price increases, and the current economic circumstances. These factors are making survival of business difficult. There are a number of innovative ideas to decrease these effects, but it becomes more challenging. Employees however indicated that given what happened during the pandemic business might continue to scale-down their activities which will result in job losses, but they also realise the importance of the services delivered by the hospitality sub-sector and the need for these services. In terms of the future of work academics requested limited government intervention in their activities. The need for access to education was noted even if it can be access to basic courses that will give higher access to the sector. The notion to professionalise certain occupations in this sector was also supported by the academic participants. This will contribute to the attractiveness of the sector and build the image of the hospitality sub-sector as a good employer.

Table 4.16: General aspects

EMPLOYER VOICE	EMPLOYEE VOICE	ACADEMIC VOICE
CATHSSETA		
• No, to limited knowledge and involvement • Employers are involved with training as the main aim		
Internship and learnership programmes		
• Support but limited participation		
Sector Involvement		
• *Participation in policy and strategy review* • No involvement • Limited involvement • *Membership of organisations* • Limited involvement in organisations		
Other comments	**Other comments**	**Other comments**
• Review wages of staff • Negative effect of loadshedding and infrastructure and these types of aspects need review • Criminal activity is problematic	• None	• Removal of barriers to develop • Reflexive higher education institutions • Student tracking as part of feedback mechanism

The employers indicated no to limited knowledge and involvement with CATHSSETA, but they indicated that they are willing to participant where possible. This is an opportunity for CATHSSETA to contribute towards the improvement of certain skills in the hospitality sub-sector. Added to this the participants support internship and learnership programmes but have limited participation in such – this is also an opportunity to collaborate with the seta. The hospitality sub-sector shows limited involvement in policy and strategy review activities and limited involvement with national sector related organisations. On a last note, academic participants indicated the importance of removing barriers that will improve growth and development. Higher education institutions should reflect on their programmes with insights from the industry.

4.5 RECOMMENDATIONS RELATED TO THE RESULTS

The following recommendations are made:

- The value of the hospitality sub-sector was recognised in the results. However, the image of the sub-sector needs attention since it was clear that some people enter this sub-sector when they do not get other work and easily move to other sectors. Employers are thus continuously investing in new employees with limited loyalty.
- Although access to working in this sub-sector at the lower-entry positions is considered easy this in itself creates challenges for employees not being able to move up on the career ladder and those working in the sub-sector not really wanting to work there. Some form of access, could be the completion of a free online course related to the sub-sector, should be applied. A perfect choice for this type of course would be service delivery. This will make a significant contribution to the sector not just the hospitality sub-sector. This can be a game-changer for the sector.
- There is an interesting interplay between employers indicating that students/learners are not adequately trained and the sector employing unskilled people. People applying with qualifications seems to be less desirable for positions than those without qualifications. One then wonders whether willingness to pay fair salaries are not the driving force behind appointments rather than knowledge and skills. It is recommended that a salary audit is done to determine the average salaries for different positions in the sub-sector.
- A stronger collaboration should be established between the sector, CATHSSETA and training institutions. CATHSSETA could facilitate this collaboration towards a stronger workforce and sub-sector to create synergy in the sector and ensuring the sector develops a competitive advantage with a skilled workforce.
- Most employees were trained in-house but did not receive certified recognition. These kinds of recognition add pride to their work which in turn develop into loyal employee. This can bridge the

concern that employees are just working for the money and not because they are passionate about this sub-sector. The hospitality sub-sector is people focused, driven by people who should be passionate about service delivery and promoting South Africa a tourist destination and the various products associated with it. If employees are not fairly promoted and paid it can pose a threat for service delivery and the sustainability of our country's competitiveness advantage.

- It was determined that occupations did not change but the roles and responsibilities linked to these occupations did change and it will be valuable to map these occupations with the new roles and responsibilities – salaries can also be added to this exercise.
- The importance of selected skills such as soft-skills was determined in the results, especially post-COVID-19. CATHSSETA can play a role in developing such courses to assist the complete sector in improving the soft-skills of employees and students/learners.
- CATHSSETA could promote the culture of learning in the sector. Employers should be motivated to encourage employees to ask questions, share ideas, and seek out new learning opportunities, to help employees grow and develop in their careers and provide exceptional service to guests.
- It was clear from results that technology was an important tool to be used by the sub-sector and the visitor after Covid 19. Online training modules or virtual reality simulations could help employees learn new skills and master different scenarios. These initiatives could be driven by government because of the cost implication for employers but will benefit the sub-sector.
- Although the industry is still in recovery, prices showed a significant increase especially in the hospitality sub-sector. Employees' salaries should be linked to these increases. It could be regulated if a skill chart could be developed for the sector whereby a minimum wage can guide the payment of employees. Loyalty, performance, pride, and drive should be promoted by financially acknowledging the employees in this sub-sector.
- A campaign to promote the domestic travels could sustain the benefits gained from this market during COVIE-19 which also promote nation pride and the indirect marketing globally of the tourism industry.
- It is strongly recommended that CATHSSETA do a roadshow to introduce their role and activities to the sector who are not participating in programmes and activities of this organisation. There is a willingness to participate but knowledge about CATHSSETA is limited. This can be a game-changer.

SECTION 5: TOURISM AND TRAVEL SERVICES SUB-SECTOR REPORT

5.1 LITERATURE OVERVIEW

The following literature review in the developmental phase enabled the development of the research instruments:

5.1.1 Aspects related to the tourism and travel services sub-sector

With the advent of the COVID-19 pandemic, limiting travel and human interaction, economies worldwide, particularly the tourism and travel industry, were grossly affected. South Africa was no exception. Regardless of the dip in economic performance and employment contribution by the tourism industry in the years 2020 to 2021, owing to the COVID-19 pandemic, the United Nations World Tourism Organisation noted a 57% return to pre-pandemic levels of tourism for the first seven months of 2022 and further envisaged a 65% recovery by year-end. With the apparent resurgence of the tourism industry on the horizon, which comes with the employment of new and once laid-off employees (albeit in different environments and conditions), emphasis ought to lie in auditing and developing employee skillsets requisite for the new dawn.

5.1.2 International and national coverage

The performance of the international tourism and travel industry can be measured by through various indicators such as international tourist arrivals, tourism revenue, and employment generated. In recent years, the industry has been growing steadily, with international arrivals reaching 1.5 billion in 2019, a 4% increase from the previous year. Tourism revenue has also been increasing reaching US$1.7 trillion in 2018, representing, a 4% increase from the previous year. In terms of employment, the industry is a significant employer, generating over 319 million jobs globally in 2018 (WTTC, 2022a).

However, the COVID-13 pandemic has had a significant negative impact on the performance of the industry. International tourist arrivals declined by 73% in 2020 compared to the number of international tourist arrivals which was recorded in the previous year. This has resulted in substantial loss of tourism revenue, employment, and skills because some skilled employees were killed by the pandemic (Rogerson & Rogerson, 2021). Nonetheless, with the gradual easing of travel restrictions and rollout of vaccines, the tourism and travel industry is expected to recover, albeit slowly, in the coming years. The pandemic has highlighted the need for the industry to be more resilient and adaptable to future disruptions.

The tourism and travel industry is a major contributor to the South African economy, accounting for around 8.6% of the country's GDP and providing employment for approximately 1.5 million people. In recent years, the industry has been performing well. The international arrivals increased from 10.2 million in 2017 to 10.5 million in 2018, and tourism revenue reached ZAR273 billion in 2018, a 2.8% increase from the previous year.

However, the COVID-19 pandemic has had a severe impact on the South African tourism and travel industry. In 2020, international tourist arrivals decline by 71% compared to the previous year, resulting in a significant loss of revenue and employment in the industry. The country's strict lockdown measures and travel restrictions also had a significant impact on domestic tourism as well.

The South African government has introduced various measures to support the recovery of the industry. Some of these measures include the Tourism Equity Fund, which provides financial support to tourism businesses. The government has also introduced the Safe Travels Stamp, which aims to promote safe travel in the country and rebuild consumer confidence.

5.1.3 Emerging trends, occupational patterns, and hospitality skills

In general, the skills needed for the present and future ought to deal with the: technology drive; transition to green economies; rapid changing and fluidity of environments; unpredictability; and less job security. Accordingly, there is a weighted emphasis on people who can work with ever-advancing technologies, rapidly changing environments and people who will be ever-willing to adjust themselves through upskilling or reskilling, where possible.

One key trend in the skills required for the present and future tourism and travel sub-sector is the need for multiple broader skills. Technological innovation has led to an increased demand for high-level skills and education. With technology comes a need for a workforce that can operate the new systems, solve problems, and maintain balance simultaneously. This makes multi-skilling important. The need for handling multiple tasks in a job environment ultimately broadens the job and skill requirements. It is disheartening to note, however, despite the surge in demand for higher skills, small differences in remuneration exist between those with higher skills and those without. This demotivates the development of higher skills in the industry.

Another new trend in global skills demands lies in the rising demand for employees who are well conversant with science, technology, engineering, and mathematics (STEM) skills and emotional intelligence. The tourism and travel sub-sector is no exception. The drivers for such skills have been computerisation, automation and technological advances, and growth in research and development figments of organisations. Regardless of the growing demand in STEM for skills, argue that there remains a short supply, particularly in most middle-income economies.

Green jobs are also identified as an area in which new skills are required. With the tourism and travel sub-sector's success linked to the general health of the environment, the sector must foster resilience and adaptation toward climate change. The greening of economies will require highly skilled jobs in environmental awareness. To this end, there is need for the creation of specific strategies to align education and training initiatives with those of the environment and climate change actions. This will eventually produce the critical skills requisite for a greener industry sector. As such, there is a need to reorient and incorporate green skills into existing qualification programmes. Examples of green skill qualifications include Green Process Design, Carbon Footprint Management, and Sustainability Management.

Another trend lies in the rise in demand for soft non-cognitive skills in current and future jobs. While the relevance of soft skills such as teamwork, communication, problem-solving, and in a workplace has long been heralded, its importance has recently been re-highlighted in the wake of increasing job uncertainty, and the need for multi-skilling. Soft and non-cognitive skills help workers foster flexibility and adapt rapidly to events. In this regard, two critical skills are highlighted: learnability (the ability to adjust existing skills or acquire new ones to suit new job requirements) and adaptability (the ability to align skills with unforeseen or unexpected job market changes). Learnability will allow for the upgrading of skills as the technological changes continuously require; for example, adaptability will make it easier to cope with what comes with one's development in response to changes in the labor market.

5.1.4 Key role players

The tourism and travel sub-sector is complex and intricate. It is not a stand-alone industry, it is made of different industries on which its survival depends. Key stakeholders in the tourism and travel industry may include government departments at different levels, local communities, individuals, private businesses, tourists, and non-governmental organisations. Stakeholders are individual people or a group of people who are affected by or can affect activities of an organisation (Freeman, 1984). The success of the tourism and travel industry, therefore, is determined by the health of the relationship between a tourism organisation and its stakeholders. Tourism stakeholders are divided into three groups: primary, secondary, and external stakeholders (United Nations Development Programme [UNDP], 2013). The three groups of key stakeholders in the tourism and travel industry are depicted in Figure 5.1.

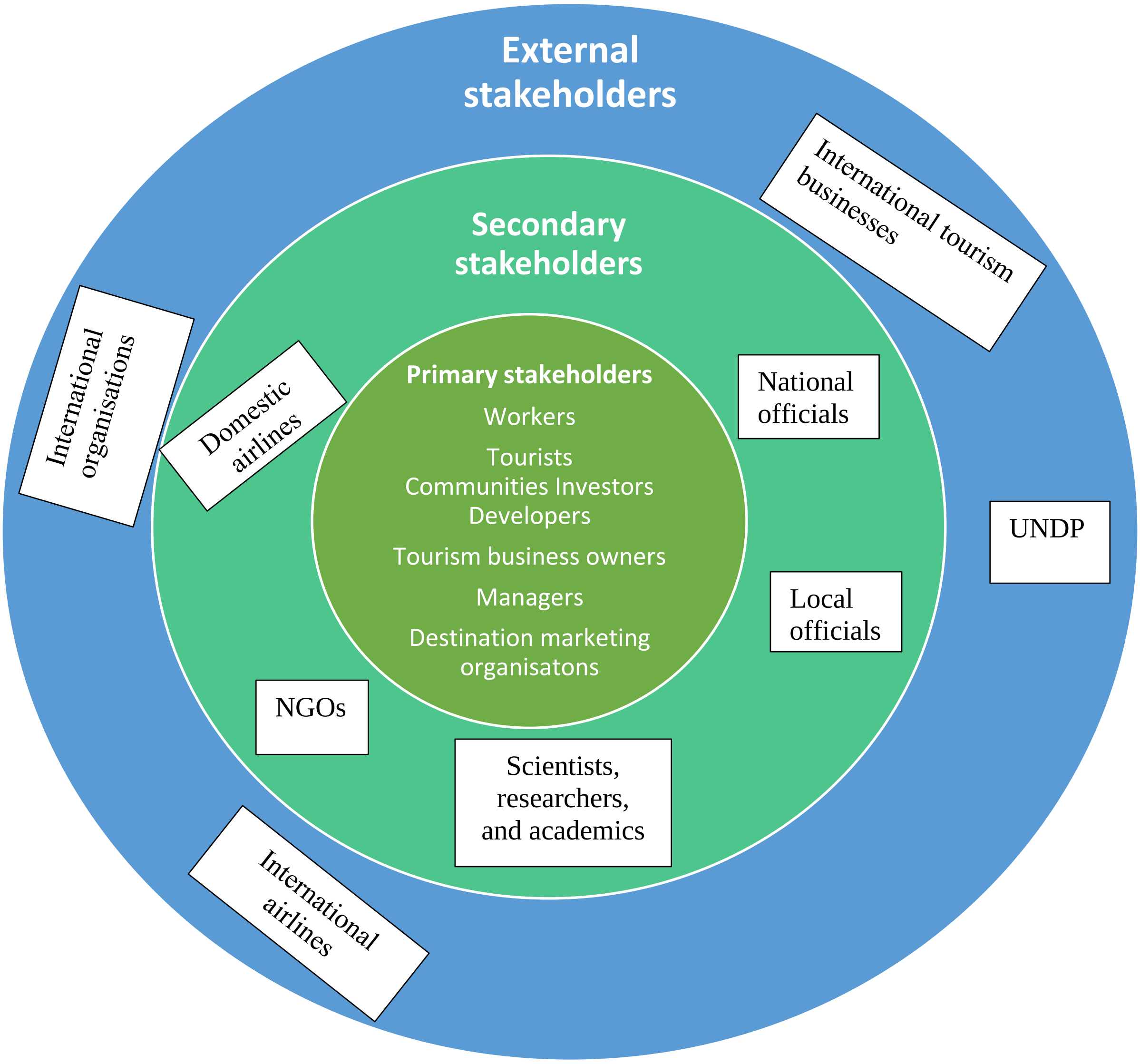


Figure 5.1: Three groups of key stakeholders in the tourism and travel industry

Source: Adapted from UNDP (2013)

5.1.5 Economic performance

The tourism and travel sub-sector is a major contributor to the global economy in spite of challenges such conflicts, terrorism, and pandemic facing the industry. Prior to the COVID-19 pandemic, the travel and tourism industry had experienced uninterrupted growth for more than a decade, and it one of the largest and fast-growing industries in the world (International Labour Organisation [ILO], 2022), making a massive contribution to the global economy. Prior to COVID-19, the contribution of the industry to global gross domestic product (GDP) was hovering above 10%. To be specific, the industry generated approximately 10.3% of the global GDP in 20919, but the industry performed poorly in the following years due to the COVID-19 pandemic. The industry was one of hardest hit industries by the pandemic. In 2020, tourism lost US$4.9 trillion, which was almost half (50.4%) of the revenue it generated in the previous year (WTTC, 2022b).

However, there is hope that the industry will return to its normalcy. Evidence shows that tourism is recovering from the pandemic, the number of international travelling is gradually increasing, translating that tourism receipts are also increasing. In 2021, tourism recorded 6.1% to the global economy compared with 5.3% which was reported in 2020 (WTTC, 2022b). South Africa's tourism and travel industry is also experiencing the same trend; the number of international tourist arrivals has been on rise since 2021. The total contribution of tourism and travel to South Africa's economy declined from US$27.4 billion (6.4% of South Africa's GDP) which was recorded in 2019 to US$12.2 billion (3.1% of South Africa's GDP) in 2020 and increased to US$13.2 billion (3.2% of South Africa's GDP) in 2021 (WTTC, 2022c). The current electricity crisis facing the country, however, is more likely to hamper the recovery of tourism and the country's economy.

5.1.6 The outlook for the tourism and travel sub-sector

The hospitality sub-sector is one the key drivers of the tourism and travel industry and the economy globally, and it is often associated with the provision of services such as accommodation, food and beverage to customers (Kansakar,Munir & Shabari, 2019). Many people view the sector as playing an essential role in promoting tourism and economic development, as it can create employment opportunities and generate revenue for local economies.

However, some individuals may have negative perceptions of the sector, particularly in areas such as customer service, quality of products, and pricing, hance a growing interest on investing in innovation in the sector (Dzhandzhugazovaa, Blinova, Liubov & Romanova, 2016). These negative perceptions can arise from personal experiences or from reports in the media of poor service, hygiene, or unethical practices. Additionally, concerns over the environmental impact of the sector, particularly in areas such as waste and energy consumption may also influence perceptions.

Nonetheless, the hospitality sub-sector remains a vital part of many economies worldwide and continues to evolve to meet changing consumer demands and expectations. Many businesses in the sector are implementing sustainable practices and adopting technologies to enhance the customer experience and reduce environmental impact. These efforts can help to improve the overall perception of the sector and create a more positive image for customer and communities alike.

5.1.7 Employer profile

The tourism and travel sector is one of the largest employers in the world, supporting almost 10% (1 in every 10 jobs) of global employment. In 2019, the industry supported 333 million jobs across the world, but more than 62 million people lost their jobs in 2020 because of the unprecedented COVID-19 pandemic, which galvanised governments across the world to restrict domestic and international travel, attempting to stop the spread coronavirus (WTTC, 2022b). Tourism businesses such accommodation establishments, bars and restaurants, travel agencies, tour operators, parks, and entertainment closed to comply with government's lockdown regulations. The industry is slowly recovering from the pandemic, but some tourism businesses, particularly small, micro, and medium-sized businesses closed their doors forever. They lost income during lockdown because they had to pay employees and other expenses during lockdown. There is no doubt that the closure of some tourism businesses adversely affected employment in the industry. However, there are no statistics indicating the extent to which each sub-sector of the tourism and travel industry was affected by the COVID-19 pandemic.

The tourism and travel industry encompasses several sub-sectors like accommodation, food and beverage services, travel agencies, tour operation companies, transportation services, natural and cultural attractions sites, and entertainment (Aynalem, Birhanu & Tesefay, 2016). The contemporary statistics related to employment in each sub-sector, however, are limited. This scarcity of statistics may be linked to the intricacy of the industry. Statistics released in 2018 by Statistics South Africa (STATS SA) reveal that the biggest employer in South Africa's tourism and travel industry was road transport passenger sub-sector with 30% of all tourism related employment. The food and beverage serving sub-sector was the second biggest employer in the country supporting 20% of the total employment in the industry. It was followed by the accommodation sub-sector contributing 19%. The fourth employer was retail trade tourism products, which contributed 15% to tourism's total employment. Travel agencies and air passenger transport each employs 4% of the total number of people working in the tourism and travel industry. Other sub-sectors employ 8% (STATS SA, 2018).

5.1.8 Labour market profile

Under the identification of skills development as a strategic development of world economies, the International Labor Organisation contends that there has been a record number of investments in skills worldwide. As pointed out in the opening section of this paper, the tourism and travel sub-sector in South Africa provides for the multiplication of employment opportunities. However, a closer look at the employment patterns and quality of skills possessed by the workforce depicts a gloomy picture.

Most employees within the industry have got low-level skills, they hardly advance their skills after employment and there are few career progression paths. Lack of tourism skills and education as an impediment to the industry's success. The South African economy and the labor market have high demand levels for higher-level skills and an excess supply of low-level skills.

The tourism and travel sub-sector is characterised by comparatively low entry barriers, with the work being associated with low remuneration, extended work hours, seasonality/temporality and high levels of staff turnover. This could provide valuable insight into the reason behind the poor skills and skills development opportunities within the sector. There are glaring mismatches between industry needs and skills education and training outcomes. This implies a need for more harmony between the tourism industry's requirements and the design of programmes that offer tourism and travel skills training. This invariably spells out the need for a skills strategy and the alignment of sector education and training programmes with that of the needs of the industry; the creation of career progression paths; and improved labor market access.

A skills strategy ought to go beyond just identifying the skills and the people who need training; it should be able to assess whether such skills will lead to improved business and employment opportunities. Such a strategy should be informed by, and will only succeed if there is, an appreciation of the skills from the demand side that considers the different work conditions and the need to respond to different changes and disruptions.

Improving a country's human capital skills should not only focus on the investment in people's capabilities and their development but also on the sustainability of the work itself and the working environment. The solutions to these challenges, as alluded to above, should be holistic in addressing the demand side issues of labor to eliminate mismatches as a result of industry's non-involvement in skills development as well as the supply issues of labor (low skills and poor education) within the tourism and travel sub-sector.

Through partnerships of the industry with the technical vocational educating training (TVET) institutes and the skill sector authorities that oversee them, labour market information (LMI) that captures the present and anticipates the future skillsets required by the industry, can easily be transformed to inspire the development of robust and competent training programmes that address the needs of the sector. Furthermore, partnerships between the industry and TVET will allow for the seamless integration of the school-to-work transition, inspired by opportunities accorded to learners for activities such as apprenticeships, on-the-job training, and internships.

5.1.9 Factors affecting skills demand and supply

Whereas the supply of skills will always be the mainstay of skills policies, equal attention is required to understand the proponents of skills demand in a workplace if the value is to be added to the jobs. The purpose of a better understanding of the skills demand and supply dynamics is to inform planning, training and education better and assist people with their educational and career options.

Skills demand estimation involves the analysis of four critical related areas: economy state, labour force, current skill demand and future skill demand. Economy state investigates economic performance, diversification, export growth, and the savings and investment culture. An analysis of the labour force categorises the employed and the unemployed according to gender, age, race, and level of education. Similarly, the analysis of current skill demand assesses occupations with high demand, perceptions of employers, skills requisite for growth initiatives, and the age profiles of employees; gender and the age profile of workers within the sector, and skill changes in occupations. Future skill demands are mainly analysed through forecasts and projections based on envisaged industry developments and technological advancements.

Figure 5.2 illustrates the optimum interaction of skills demand and supply in the context of the economic conditions and labour force for guidance in developing an informed skills policy.

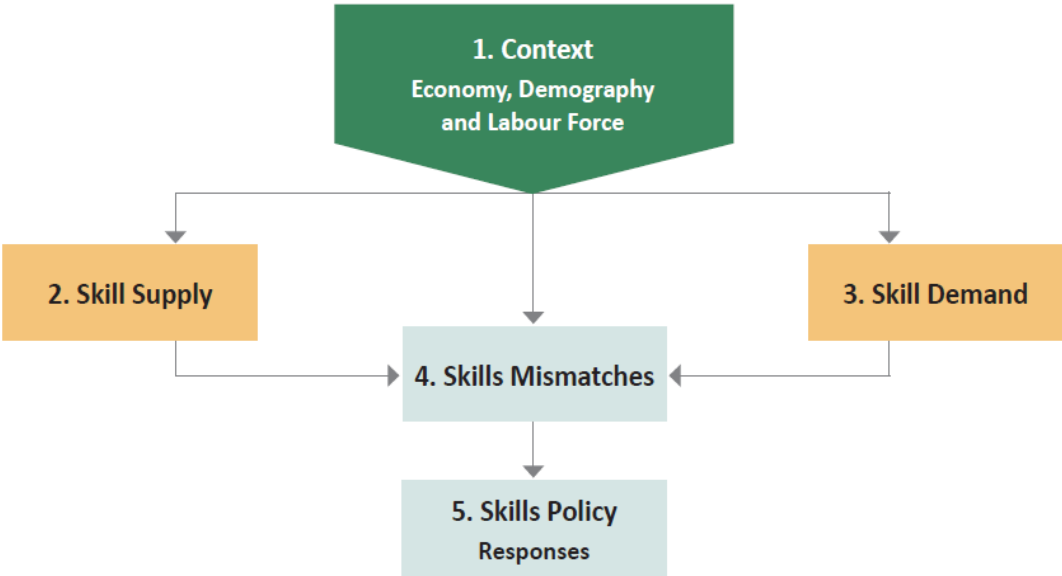


Figure 5.2: Framework for the analysis of skills supply, demand and mismatches

In the South African context, the supply of skills to the tourism and travel sub-sector, just like other sectors of the economy, is mainly driven by schools, TVET colleges, and universities. While there has been an analysis of enrolments, and completion rates, including gender, age and race trends of the critical supply institutions (schools, TVET, and universities) for the general industries in South Africa there has not been any that focuses on the tourism industry and its sub-sectors.

Regarding skills mismatches, there are limited data from South African organisations, the tourism and travel institutions included, to give a complete picture of the nature of skills gaps employers in the country grapple with. Nonetheless, from the analysis of skills supply and skills demand, one can classify skill mismatches into three main categories: demand mismatch (which looks at the economy needs, the jobs being created, skills set, and the employees' expected skill sets); education supply mismatch (when the supply of skills from the educational institutions fail to respond to the industry's skills demand); and qualification-job mismatch (when the qualifications of skilled employees do not align with the skill sets required in the sectors they are absorbed into) .

5.2 THE QUALITATIVE RESEARCH RESULTS

5.2.1 The tourism and travel services sub-sector: An employer perspective

5.2.1.1 Overview of the tourism and travel services business

a. Background to the tourism and travel services business

The participants were drawn from a variety of tourism and travel services organisations as can be seen in Table 5.1.

Table 5.1: Type of business and core responsibilities

TYPE OF BUSINESS	CODE	RESPONSIBILITIES
Tour operating company	TE3	Managing the company that focuses on adventure experiences and skills training (8 years)
Travel management company	TE4	Arranging events and tours (18 years)
Travel agency	TE5	Delivery travel services to the government (10 years)
Event management company	TE6	Focusing on corporate events and weddings (8 years)
Large convention centre	TE7	Hosting of conferences and other types of events (14 years)
Tour operating company	TE8	Specialising in safari tours, education and leisure tours (9 years)
Entertainment business	TE9	Providing entertainment services to customers (6 years)
Travel agency	TE10	Providing travel related services
Function venue	TE11	Offers event services as well as accommodation (6 years)
Travel management company	TE12	Deals with business travel, events, conferences and exhibitions (12 years)

Based on the credentials of the interviewees, it is clear that they have vast experience in the sector and have been in operation for between 6 and 18 years. There are also a variety of different types of businesses operating in this sector providing a broader view to the questions asked.

b. Changes in the sector as a result of COVID-19

Based on participants responses to the changes in the tourism and travel services sector three themes emerged of which technology is the strongest.

Firstly, **technology affected and changed this sector** significantly (TE4, TE5, Te6). TE4 indicated the development of technology for business purposes during the pandemic; it allowed for an improvement in service delivery and efficiency – [TE4…*it was not a good experience, but it has sort of created the opportunity to come up with new ways of improving the business*]. It was also indicated that digital technology is playing a pivotal role where both tourists and tour operators are equipped with the latest technology. TE5 stated that [TE5...*we were a bit comfortable*] but the pandemic fast-tracked these developments. The fast development of technology, however, empowers the business and it is important to keep abreast of what is happening in terms of technology. TE6 stated that [TE6…*COVID-19 brought a whole shift very quickly*]. The importance of technology in this change process and the fact that one must use technology to its fullest potential was highlighted – virtual tours and snippets of the tourism product were mentioned (TE9)

Secondly, **business models changed** due to the pandemic (TE9, TE6, TE7). All activities in the sector came to a halt and then they had to make plans to continue, which was then done through online events, then there was a shift to hybrid events and back to physical events (TE9) - the challenge is that the sector is unsure of what the customer wants now and even the customer is unsure – [TE6…*now anything goes*]. TE7 stated that COVID-19 killed the industry during the lockdown period and since the recovery started, the business shifted due to people's reluctance to attend events. There was a shift towards online and hybrid events, but this is a challenge with the business set up for physical events and having people on-site. The recovery is, however, quicker than expected.

TE3 indicated that it affected mostly the hospitality side of the business and staff got very sick. TE5 indicated that the pandemic affected the sector, especially in terms of international travel. The importance of domestic travel has been realised.

TE9 stated that in general, there was an increase in the number of women involved in the sector and the number of youth that entered the sector. Regarding COVID-19, it was stated by TE9 [TE9… *we just need to be adaptable to change*]. TE12 indicated that a lot of time was spent on administration around refunds, cancellation processes and exchange processes during the pandemic. The company focused on keeping the staff by diversifying its services and the platforms where these services are available.

Thirdly, **changing consumers and expectations** were noted (TE8, TE10, TE11). TE8 indicated that the biggest challenge is to convince people to travel again, given the economic difficulties people are facing. TE10 indicated that business is slow in the recovery phase and that traveling is happening on a tight budget and smaller scale. According to TE11 the size of events has decreased, and the tourist/client has changed – they are now focusing on experiences and value for money. These tourists want more value and better experiences than before COVID-19.

The major themes that emerged are technology that affected and changed this sector, change in business models and changing consumers and their expectations.

c. Economic performance of the sector

The participants were requested to provide their opinion on the economic performance of the tourism and travel services sector and indicate the factors influencing growth in this sector. From the discussions three themes emerged.

Firstly, the **value of the tourist market** (TE3, TE4, TE6, TE8, TE9 and TE10). TE3 stated that due to the pandemic, people wanted to use their time while they have it and so domestic tourism increased significantly – [TE3...*so before something can happen, they should take the opportunity to travel*]. The economic prospects of tourism will remain relevant, according to TE4. There was an increase in tourist numbers at the end of last year and the beginning of this year and even though safety has become a big concern, it does not stop most tourists travelling to South Africa. On a positive note, TE6 stated that there is still money to be spent in this sector and people are following a bucket list approach – previously, they thought a certain trip was too expensive, but now they do the trip because they are afraid there might not be such an opportunity again – [TE6… *I think what drives growth is people's need to fulfill themselves and the things they want to do*]. It was indicated by TE8 that travel is increasing again but stated that there should be more advertisements of different destinations and what is offered. TE9 mentioned the support given by government to provide funding and create opportunities for international and national collaborations as well as the establishment of relationships that will reap benefits. TE10 indicated that smaller tourist groups lead to a smaller income, and this is where they are now.

Secondly, certain factors, be it internal or external, are **inhibiting growth** (TE6, TE7, TE11). TE6 indicated that the growth is good but skewed. Before COVID-19, supply was high, but now several establishments have closed. If one searches for alternative establishments to host events, one might have 2-3 options where previously one had 7 options -this is affecting the value chain and provision of adequate services. TE7 stated that poor communication was a challenge during COVID-19, with businesses not understanding how the industry would be revived after the pandemic. The lack of a clear strategy for the revival of business travel to South Africa is a challenge and influence economic performance. It was also stated that there needs to be clear communication with the industry to understand their needs. TE11 feels that the economy is recovering and there are new entrants to the market.

Added to the above TE5 questioned the environment of growth, focusing on policies, land ownership, the ability of people to create new ideas, and the availability of capital to develop businesses and entrepreneurial skills. These aspects refer to support for this sector to grow.

The major themes that emerged include the value of the tourist market and inhibiting.

d. Challenges in growing the tourism and travel services sector

The challenges indicated by the participants were very focused.

Firstly, participants highlighted **infrastructure** (roads and loadshedding) as a significant challenge (TE3, TE5, TE4, TE5, TE7, TE8). TE3 indicated that the government's focus on the tourism industry to be government-led, private-sector-driven and community based is not working given the state of infrastructure. Poor road conditions are a major challenge for tours operators (TE3, TE5). TE4 stated that the infrastructure in South Africa has been deteriorating – roads have not been maintained in the last 10-15 years in North West – this creates damage to vehicles which costs the operator additional money to repair. One cannot take tourists to villages and communities since the infrastructure is non-existing and the safety of tourists is a concern (TE5). TE8 indicated road infrastructure as a major challenge in the industry. TE7 highlighted infrastructure and, more specifically, ESKOM as a challenge in doing business. TE5 mentioned two major challenges for this sector, namely safety and loadshedding. The latter is hampering businesses, in the case of a travel agency when they are busy with an online booking and loadshedding starts, everything is cancelled. The cost of putting up solar panels is just too high – [TE5…*we know that we are having these challenges, but like I say, we remain optimistic that we will overcome*].

Secondly, certain **external factors** are considered as challenges. It was stated that crime rates, petrol prices, recklessness on the road, and the economy of the country are major challenges for tour operators (TE3). It was also mentioned that the so-called 'fly by nights' are a major problem taking people's money without service delivery [TE3… *companies who take advantage of existing clientele*]. TE9 mentioned two challenges, the first one being taxi drivers that operate illegally as tour operators and tourist guides that operate illegally. The monitoring and policing of these elements are important. TE6 stated that the biggest challenge is to figure out what people want because [TE6…*it is not business as usual*]. Some people want to come together again, but others do not, and it will be a challenge to get these people out of their homes to travel again. The overall economy of South

Africa was mentioned as a challenge (TE11) since people lost their jobs, which influences their spending. These external factors relate to the application of laws and processes but also the understanding of the demand better.

The following themes emerged, namely infrastructure and external factors.

5.2.1.2 Labour-related information

a. Types of occupations/positions relevant to the tourism and travel services sector

From the discussions a variety of occupations or positions occurred. The importance of management, finances and administration was themed.

Emphasis was placed on marketing and advertising by TE3. In a travel company, positions related to services, customer services, customer care, business development and financial management are important (TE4). TE4 stated [TE4...*constantly have people who are graduating in the sectors who understand what it means to be a service provider*..]. TE5 is a small company and thus their most important positions are the director and the marketer but mentioned that the [TE5...*heart of the company is the financial manager*]. For TE6 it is important to have an event manager and an employee that is strong in administration. TE7 stated that in his business positions such as banqueting, beverage and bar managers are important as well as chefs and the sales staff – this business is however self-contained and does all maintenance inhouse.

For TE8 some of the core positions in his business are the administrator, the receptionist and the financial manager. According to TE11 sales and marketing are the most important positions currently and having knowledge related to technology was highlighted. It was stated that the sector now needs employees with a certain skill level, experience and knowledge to take the sector forward.

The major theme that emerged is related to management, finances, marketing and administration.

b. Types of qualifications relevant to new employees

From the discussions it was clear that this sector requires qualifications at different levels and experience.

Firstly, the sector requires qualifications at different levels (TE4, Te5, Te6, TE8, TE9). TE4 stated that one should at least hold a diploma or a degree because everybody needs to [TE4... *consider this profession as a serious profession*]. They do make provisions for people without these types of qualifications as well. TE5 stated the importance of employees with diplomas or degrees in tourism or tourism management. For TE6, qualifications are important, but she is looking for someone who studied tourism or hospitality management because they have a background in terms of how the industry works but experience is more important – [TE6… *I did not necessarily employ what I learned during my qualifications;…qualifications are important as it put you in a different mindset*]. From a qualification point of view TE8 stated that all people need to have training, but for the financial position and the tourism position, the person should have a diploma or a degree. TE9 also stated the important of a diploma and a degree as that gives the student access to business management skills which he considers very important.

Secondly, the importance of **practical experience** is important. (TE7, TE11). TE7 stated that experience is more important than qualifications. In this sector, one can work her/himself up, but for financial positions, you will need people with the relevant qualifications. Also emphasis was on the importance of incentivising the industry that is investing in their staff and equipping them with skills to succeed in the sector – [TE7… *I focus on people that want to learn*]. TE11 stated that university students have limited work experience, whereas students from colleges come better prepared than university students.

TE5 alluded to the fact that they need a person with a good attitude and personality to fit in – [TE5...*this is a 24/7 type of sector*].

The major themes that emerged are relevant qualifications and practical experience.

c. Skills needed to work in the Tourism and travel Services sector (pre and post COVID-19)

The discussions revealed a very specific list of skills important in the tourism and travel services sector. Some of these skills related to **dealing with the customers** (TE3, TE4, TE5, TE7), some related to dealing with **soft-skills** (TE4, TE5, TE6, TE9) and **technology skills** (TE9, TE4).

TE3 indicated that employees need to understand target marketing and know how it should be done (TE3). After COVID-19, the importance of safety, and health and safety became more apparent. According to TE4 emotional intelligence, customer service and being able to work with people are important. It is also important to understand the needs of the customers – this leads to loyal customers, [TE4...*also provides an everlasting experience for our clients, they can always come back to us*]. TE4 stated that one needs to review how things are done on a continuous basis, finding better ways to address challenges. It was stated that technology, the ability to operate online tools and software, is now a new skill set that will take businesses forward. TE5 indicated the ability to work with people, be a good communicator, and negotiator, think on your toes and be flexible. Additionally, be customer service oriented, being a team player and leadership. It was also indicated that the new cohort of young employees is a challenge since they just do the work and do not do the work as if it is their own company. Additionally, it was indicated that businesses should diversify their product and create more offerings since it will also lead to a more sustainable tourism product.

TE6 stated that common sense is the most important skill. This is followed by critical skills, attention to detail, being friendly and being an outgoing person that can think on their feet. TE7 indicated that interpersonal and conflict management skills are important – a strong personality, the ability to plan and execute the plan – [TE7…*you've just got to be an all-round operator, in this industry, you have to be a doer*]. TE8 indicated that the industry is very broad, but being able to serve as a tourist guide, in general, was considered as important. It was also indicated that the staff had to learn how to work with a mask and still be presentable and approachable to guests. TE9 stated that interpersonal, business management, entrepreneurial and communication skills are very important, as well as knowledge of technology. It was also stated that post-COVID-19, the importance of adaptability and technology has increased – [TE9… *if there is a second pandemic, you will know how to do it*]. TE11 indicated [TE11…*customer service skills are number one*]. It was added that technology skills are very important in this new world of work.

The following themes emerged, namely dealing with consumers, soft-skills and technology.

d. Readiness of employees entering the conservation sector

Participants opinions related to students/learners' readiness to work effectively in the sector were asked.

The first theme that emerged from this discussion relates to **future employees not ready to enter the sector**. TE4 indicated that not all students are ready since they do not see this sector as a serious sector – [TE4...*I think a lot of people do not treat it with respect*]. TE5 indicated that she is [TE5...*extremely worried about the learners*] and that they are not ready. When they arrive for integrated learning experiences, they only want to do certain things and therefore, their attitude is a problem. TE6 stated [TE6… *honest opinion, not, due to the lack of the practical element*]. One should add a practical element so that students understand how the work at tertiary institutions ties in with practice. One might be taught a specific process, but it can be applied differently to different situations – students are not ready for that. She also mentioned the importance of understanding the online environment in this sector as part of the new skill set. TE8 stated that students are not ready since they are not always ready to meet "reality" and in some cases, they adapt slowly to the expectations of the workplace. TE3 stated that the students are ready to operate in the tourism and travel services sector. It is, however, an eye-opener for them – [TE3… *now you are dealing practically with people, with clients and all these things*].

The second theme that emerged from the discussions relates to **the importance of practical experience**. TE7 highlighted the importance of experience and training the individual until they have the right skill set for the work – there is a difference between practice and theory. The workplace requires an individual that can think on their feet and operate under pressure. TE9 indicated that students have the theoretical background, but they still need integrated learning spaces to get exposure to practise. TE11 stated that students are not ready since [TE11… *they do not truly understand what the industry entails*]. Practical exposure during studies is very important.

The major themes that emerged include students unprepared for the workplace, a lack of practical experience and reality shock.

e. Challenges in the current labour market

On the question related to the challenges that the sector experience in relation to the labour market the following themes were developed:

Firstly, **job delivery and expectations related to it** (TE4, TE6, TE8, TE11). Some of the challenges mentioned by TE4 included inconsistent job delivery and people not taking the job seriously. TE6 stated that the current labour market is interesting – people get the position but then lose interest and leave even if they do not have another opportunity. One of the challenges mentioned by TE8 is that it is difficult to find people with experience that one can afford and if you have somebody and that have been trained, they move to another company – thus, keeping experienced staff is a challenge. A major challenge mentioned by TE11 is the lack of experience.

Secondly, **readiness of the business to employ** (TE5, TE6, TE7). Recovering from COVID-19 TE5 indicated that they do not employ any additional people currently but will do that later when business is better. TE7 stated that the sector lost much experience people, with people leaving the sector and not returning. A systematic re-employment strategy will be followed to ensure [TE7… *that my skills pool does not get diluted to the extent that it affects the quality of my product]*. It was indicated that when employees start in a position, they want to be the manager, but they have never worked in this sector or position – get upset if they are corrected in their work. TE6 stated [TE6…*finding decent people is a challenge*].

The major themes that emerged include job delivery and expectations and readiness of the business to employ.

f. Upskilling of the labour market

From the discussions there were significant **support for continuous upskilling** of the labour market which can be external or internal training (TE3, TE4, TE5, TE6, TE7, TE8, TE9, TE11). Some upskilling is done in cooperation with the tourism association (TE3). Upskilling is supported by TE4, who mentioned short courses and providing the employees with the tools of trade tailor-made for this business. These are considered longer-term investments to benefit the activities of the company. TE5 supported upskilling by using online skills development training and also courses and workshops offered by local municipalities. TE6 stated that [TE6… *you can never be stagnant, you must always develop new skills because there is always something new happening*].

TE7 is a firm believer of upskilling and training programs are constantly running – either internal or external programs. Succession planning is also important and part of the planning process. Upskilling is supported by TE8, but they do not provide training. They participate in external training programmes offered by the National Department of Tourism and other organisations. It was stated by TE9 that he supports upskilling in the form of workshops and training that are well-suited for the type of business. TE11 also emphasised the importance of upskilling but referred to cross-training and cross-functioning – thus, an employee can also assist in other departments if needed.

The following themes emerged namely continuous upskilling.

g. Support of internship programs or learnership programs

On the question whether participants employ people in learnerships or internships one theme emerged.

Those that indicated yes, mentioned the following aspects (TE4, TE6, TE8, TE7, TE9, TE11). TE4 does accommodate learners and he mentioned that a learnership or internship spreads the work, especially during peak season – he calls this a [TE4...*win-win situation*]. TE6 did make use of the learnership programme when she was situated in Johannesburg, but due to the current location she cannot do that now. She, however, stated the importance of learnership. She does not feel that this programme assists in the growth of her business, but it contributes to the growth of learners.

TE7 stated that pre-COVID-19 they were taking learners in, but during the recovery phase, they do not do it. Learnerships are important as it shows the learners how the sector operates, but it also brings some academic knowledge to the current staff. TE8 indicated that they had received interns and the major benefit to the company is that these students come with new knowledge and share that, on the other hand, they get exposure to the industry. TE9 does employ people from the community but not through an internship or learnership programme – more service providers. TE11 hosted university students in the business, which assisted in the transferring of skills and knowledge and empowered the students. On the other hand [TE11…*also contributes a lot, having a bigger team to execute the work and it also relieves you somehow of your wage bill as well*].

TE5 indicated that they do not participate in learnerships or internship programs.

The major themes emerged include supportive of internships and learnerships.

5.2.1.3 CATHSSETA-related information

To assess the knowledge of participants related to CATHSSETA and relate programmes a discussion related to participation in opportunities created by CATHSSETA was done.

The first theme that emerged from the discussion relates to, **no, to limited knowledge and participation** (TE3, TE4, TE5, TE6, TE7, TE8, TE9). It was stated by TE3 that they never had an opportunity to participate in learnerships and other programs from CATHSSETA. TE4 indicated no participation in CATHSSETA programmes due to a cumbersome process, although he did try at some time. TE5 has never participated in any CATHSSETA programmes. TE6 has not participated in any CATHSSETA programmes and stated [TE6…*so no I am like, is it because I do not look in the right places? Or is it because they do not put themselves out into the right places?*]. TE7 stated that they do not participate in CATHSSETA programs since they are focused on the recovery phase – it is on the radar. For TE8 it was clear that they have not participated in CATHSSETA programmes but more in programmes offered by the National Department of Tourism. TE9 indicated an awareness of the CATHSSETA programmes but no participation due to a perception of age restrictions. TE11 indicated that she participates if there are calls from CATHSSETA. TE3 indicated that they do place students in their business. It was indicated that human resources are needed in this sub-sector and in that regard, students already have an idea of what is happening in the industry and thus businesses do not need to start from the beginning with them.

The major theme emerged as no, to limited knowledge of and participation in CATHSSETA-related programmes.

5.2.1.4 Involvement in the sector

a. Input to policies and strategies

In terms of active involvement in the sector's development regarding inputs to policies, development plans and workshops one theme emerged namely **active participation through local associations and organisation** (TE3, TE4, TE5, TE7, TE8, TE9). TE3 indicated that he had been involved in these initiatives through member associations. He also participates in workshops and community outreach programmes. TE4 indicated that he has been invited to participate in workshops and meetings and works closely with government. It was indicated by TE5 that they participate in opportunities where discussions are happening around policies – especially on local level – [TE5…*it is critical for us to be given an opportunity to actually partake and to influence policies that are definitely going to be affecting our businesses*]. TE7 stated that he is involved in local organisations, who request input from members, and this was especially done during COVID-19. TE8 indicated involvement and input through local and provincial tourism associations and departments. TE9 stated that as a tourist guide, he participates in these initiatives when requested and indicated the importance of participation. TE6 and TE11 are not involved in any activities related to policies and strategies.

The major theme that emerged is active participation through local organisations and upon request.

b. Membership of relevant associations and organisations in the sector

The discussions led to the development of two themes, namely involvement on a national level, and involvement on a local level.

Firstly, involvement on a national level relates to **membership of major organisations** (TE4, TE7, TE11) TE4 stated involvement with ASATA and SATSA. TE7 is part of the African Exhibition Association and the SA Events Council. TE11 indicated involvement in the South African Township Association

Secondly, involvement on a local level relates to **membership of local organisations** (TE3, TE8, TE11) TE3 stated involvement with local tourism associations and organisations. TE5 is involved in Women in Tourism Association, the Tourism Association in Mahikeng and North-West Tourism Business Owners. TE8 and TE11 are actively involved with local tourism associations. TE11 indicated involvement in the Women in Tourism Association. TE6 does not form part of any associations reason being favouritism – people operate with kickbacks, and she is against that way of work.

The major theme that emerged is active involvement in several associations.

5.2.1.5 Future work in the tourism and travel services sector

a. The future work in the tourism and travel services sector

It was emerged in the discussions that participants are positive about the tourism and travel sub-sector as one participant called it an everlasting type of industry.

Firstly, **optimistic about the future of the tourism and travel services sub-sector** (TE3, TE4, TE5, TE7, TE9). TE3 is very positive about the future of and the impact of the South African tourism industry – [TE3… *probably as the best destination, the whole of Africa at some point*]. TE4 state that [TE4... *tourism is an everlasting sort of industry that will continue to be here*]. It is important to build on what there is and ensure that it becomes a sustainable industry. Regulation, however, was mentioned as a challenge with so many businesses operating illegally and scamming clients. TE5 provided a positive outlook for this sector if [TE5…*things change, and we have more people traveling*]. TE7 stated that [TE7…*it can only get better because, quite honestly, it can't get worse*]. He is very positive about the future of this sector and industry and indicated that it is important to increase the visibility of what SA offers both locally and internationally – so people see that SA also offers business travel opportunities. TE9 is very positive and feels that the training and development will pay off at some time.

Secondly, **investment in staff** were evident as a strategy for the future (TE8, TE11). The future world of work in this sector needs to be driven by practical training so that the visitor and their needs are understood. For TE8 the future world of work lies with technology, as he indicated that it is important to capacitate the staff with skills related to the online environment and virtual platforms. TE11 stated that upskilling and cross-functioning are important in this sector and that one needs to be innovative regarding operations going forward.

The major themes that emerged are an optimistic outlook about the future of the sector and investment in staff.

b. Other comments

The participants highlighted the following aspects that they consider as important in developing this sector:

The importance and the lack of domestic tourism and tourism in communities were highlighted by TE3. The opportunities for tourism in communities should be further explored and developed. TE5 focused on the development of local tourism – [TE5…*believing in what we have in our space*]. She indicated that people travel for experience and the industry should be creative – [TE5… *experiences that will talk to the tourists*]. TE8 highlighted the importance of the hidden gems in South Africa and that more should be done to showcase these gems to different markets – especially in the rural areas.

TE4 mentioned the success of other countries in terms of tourism and stated that tourism in South Africa could assist in reducing unemployment and growing the economy.

TE6 stated that there is a number of people in the sector that does not fit and that hurts the sector. She indicated that it is a tough sector.

TE7 recommended that the sector provides input to strategies as they have experience and knowledge and have been working in this sector for a long time – that all sectors of the industry sit together and exchange ideas around growth. TE11 indicated that there should be better cooperation and coordination between national, provincial and local authorities to make this sector and industry work. It is important that people understand the difference that tourism can make for the country and the economy.

The major themes that emerged relate to the development of local tourism and improved cooperation between government levels.

5.2.2 The tourism and travel services sub-sector: An academic perspective

5.2.2.1 Background to the academia interviewed

The participants were drawn from a variety of educational institutions as can be seen in Table 4.

Table 5.2: Positions and duration of involvement

POSITION	CODE	DURATION OF INVOLVEMENT
Lecturer at a Higher Institution of learning	TA1	Did not state
Senior Lecturer at a Higher Institution of learning	TA2	13 years
Lecturer at a Higher Institution of learning	TA3	18 years
Lecturer at a Higher Institution of learning	TA4	25 years
Senior Lecturer at a Higher Institution of learning	TA5	20 years
Head of the department at a Higher Institution of learning	TA6	15 years

Academics with significant experience in teaching tourism and travel related subjects participated in the interviews. They can provide perspectives over time as well as deep insights.

5.2.2.2 The educational landscape

The educational landscape was influenced by a number of external factors of which COVID-19 was the most significant. It is important to determine how the educational landscape has changed as that influences future planning and development.

a. Changing educational landscape for tourism and travel services

From the discussions two themes emerged.

Firstly, the **changing teaching landscape** was identified (TA2, TA3). TA2 indicated that the landscape has already changed due to COVID-19 with online classes and a changing macro environment. He stated that there will be more changes due to the ever-evolving sector of tourism and travel services. Some of the changes in the process include the decolonizing of higher education, the focus of universities on quantity and the move towards the acknowledgement of tourism as university subject. According to TA3 the landscape has moved to an online environment where technology plays an important role. Courses such as Marketing should adapt their content to adhere to the needs of the industry.

Secondly, the **importance of being relevant** was recognised (TA4, TA5). It was indicated by TA4 that it was realised how important it is to keep the curriculum updated and keep constant contact with the industry. Events are part of an ever-changing environment, and remaining relevant is critical. TA5 stated that the landscape changed in terms of offerings and in the case of her institution, they had to adapt qualifications to the new NQF framework.

TA1 stated that the training offered by different institutions varies and that leads to different outcomes – the student is the end product, but they differ between the institutions once they complete their qualifications. He also highlighted the gap in training soft skills and people skills during COVID-19 and stated that it would have an influence on the sector. TA6 indicated that technology brought a number of changes which had to be adopted in the curriculum as well as a demand for soft skills.

The major themes that emerged relate to the changing teaching landscape and the importance of being relevant.

b. Curriculum changes

Based on the discussions with the participants the importance of **re-curriculation** was realised (TA1, TA5). TA1 stated that the online environment of teaching created new opportunities and going forward. It was also indicated that one should find a balance between the online and contact environments – [TA1… *this will give us a more rounded graduate in the end who can handle different environments*]. According to TA5 curriculums were changed before COVID-19 and had to be adapted post-COVID-19 again to fit the current needs of the market, namely technology and soft skills for the students. Discussions with advisory boards and industry leaders influenced the content of the new curriculums.

The major theme that emerged relates to re-curriculation.

c. The effect of bodies such as the Department of Higher Education (DHET) on programme development

From the discussions themes around **difficult process to change programmes** emerged (TA1, TA2, TA4, TA5, TA6). According to TA1 [TA1…*it (DHET) plays a big role because those guys are the ones that dictate how you design your cost, the credits…*]. It was stated that it is difficult to add content to an academic programme that is new, unique, and important to the students. Furthermore, it was also indicated that the stringent processes limits ones' creativity. According to TA2 [TA2… *we cannot do anything without getting permission and approval from them* (DHET)]. The tourism and travel sector is however, changing, and programmes need to transform based on what is happening in real life. TA4 also indicate the difficulty of the process when accrediting a qualification with DHET. This was supported by TA5 who indicated that it is a tedious process to go through and it takes a long time to complete, by then one has to make additional changes again. TA6 argued that a programme cannot be changed easily when there is an urgent need for changing it. They must go through the processes to ensure that the programmes remain relevant. However, TA3 is of the opinion that the institution is not influenced by the Department of Higher Education.

The major theme revolves around a difficult process to change programmes.

5.2.2.3 Labour-related information

a. Qualifications and skills relevant to the tourism and travel services sector

From the discussions certain programmes and skills emerged.

Firstly, the **availability of high-level qualifications** for this sector was clear:

- Offering BA and BCom degrees in Tourism and certain diplomas. Some of these qualifications include practical components and others do not (TA1).
- TA2's institution offers the complete spectrum of qualifications in tourism management. Programmes are developed in such a way that they focus on entrepreneurship.
- Programmes related to tourism, tourism marketing and hospitality are offered by TA3's institution include diplomas and advanced diplomas.
- TA4 offers at her institution a diploma in event management which provides students with tools and skills to work in various subsectors of events. Work-integrated learning is a valuable part of this diploma.
- TA5's institution offers post-graduate diplomas to doctoral qualifications, whereas TA6 offers a range of qualifications up to a PhD in Tourism Management. Interestingly, many students continue with their honnors degree and grow into academia.

Secondly, the **professional skills, professional attributes and soft skills** were indicated as important, and these skills are listed below:

Professional skills:

- Business survival skills in difficult times (TA1)
- Problem solving skills (TA1, TA4, TA5)
- Technology skills (TA2, TA3, TA6)
- Social networking skills (TA2).
- Service excellence (TA3)
- Diversity management (TA3)

Professional attributes:

- Patience (TA4)
- Creativity (TA4, TA5))
- Perseverance (TA4)
- Teamwork (TA4)
- Innovative (TA5)
- Organised (TA6)
- Self-driven and self-promotion (TA6)

Soft skills:

- Communication skills (TA1, TA2, TA3, TA5).
- Leadership (TA5)
- Time management (TA5)
- Multi-tasking (TA5)
- The ability to handle pressure (TA1, TA2)
- Interpersonal skills (TA2, TA3)
- People skills (empathy, flexibility and adaptability) (TA1, TA5)

The major themes that emerged relate to availability of high-level qualifications, professional skills, professional attributes and soft skills.

b. Changes in skills pre- and post-COVID-19

Based on the discussions with the academics certain changes were noted. Firstly, there is a need to **improvement of digital skills** (TA3, TA2, TA4, TA5). In a post-COVID-19 context, TA3 and TA5 highlighted the relevance of digital skills for marketing. TA2 and TA4 mentioned the importance of technology skills moving forward. Skills related to industrial revolution are important and there is a bigger emphasis on sustainable travel (TA5).

Secondly, the **well-being of the employees** was highlighted (TA3, TA2), TA3 indicated that employees now need more emotional support than before COVID-19. TA2 also mentioned being resilient and looking after the mental health and well-being of staff.

Overall, it was indicated by TA1 that COVID-19 taught the sector to be more adaptable, creative, innovative and collaborative. For TA4, the focus post-COVID-19 is on collaboration between different role players, risk management, safety and technology. Additionally, it was stated that the audience has changed with much higher expectations than pre-COVID-19. TA3 highlighted the relevance of people being more health conscious. The continuation of hybrid events is also on the table, with some events going 50/50 in terms of physical and online attendance – this changes the dynamics of events and how one interacts with the audience. These changes will have an effect on how the product is packaged and might require a rethink of strategies in this sector.

The major themes include the well-being of employees and an improvement of digital skills.

c. Changes in occupations related to the tourism and travel services sector

The tourism and travel services sub-sector are exposed to changes in occupations due to **technology** as the first change (TA3, TA1, TA5). Technology will bring about certain changes and some occupations might fall away, for example a travel agency might not be needed anymore unless they create a value proposition for the tourist [TA1…*people do their own bookings]*. There is a shift in occupations, with several occupations moving solely to the online environment (TA3). TA5 indicated that the sector could not ignore Artificial Intelligence. There are various opportunities for new types of occupations in the online environment if one thinks about artificial intelligence, virtual tours, hybrid products etc.

Secondly, **occupations remain the same**, but the world of work changed (TA2, TA5). According to TA2 the occupations remains the same but there must be more flexibility in the workplace. There might not be a change in occupations, but the events sub-sector lost hands-on experience and knowledge with experts that moved to other industries, thus leaving a gap in the workforce. To a certain extent, one needs to build this expertise again, but students are sceptical about working in this sub-sector due to what happened during COVID-19. TA5 stated [TA5…*I do not necessarily think that occupations will change but the role that you need to fulfil within that occupation will definitely change*]. Technology is now more important than before COVID-19. The specifications of a position might change but not the position.

Thirdly, there are a **variety of occupations** in the tourism and travel services sub-sector (TA5, TA6). According to TA5 [TA5…*the occupations are quite endless when it comes to that because they also have the various genres of events*]. Some occupations include sports event managers, event managers, professional conference organisers and working at destination marketing companies. TA6 mentioned occupations such as tour operators, event management, hotels etc. and employees that need to be multi-skilled.

The major themes involve technology changes occupations, occupations remained the same, but role and responsibilities changed and there are a variety of occupations available.

d. Shifts in the labour profile of the tourism and travel services sub-sector

The results yielded support for two main themes namely competency with technology and soft-skills.

Firstly, there is a need for employees with expertise in **technology** (TA2, TA6). For TA2 there is a need for people with better technology skills – companies are looking for younger employees that possess this skill. There is also a move towards more short-term contract positions – thus a person is not permanently employed but contracted to deliver certain work. TA6 also indicated the need for people with technology skills and that understand the sector.

Secondly, the interviewees indicated the **importance of certain personal characteristics** for the workforce (TA5, TA6). TA5 stated that transformative skills are needed as well as self-confidence, communications skills, and flexibility. It was indicated by TA6 that there was a massive shift – it is not about marks anymore but about someone who is confident, reliable, resilient and adaptable. This links with the importance of face-to-face training of soft-skills – critical to any training programme.

Thirdly, **the brain-drain** (TA4, TA5) is a cause for concern for this sub-sector. TA4 stated that with the number of people that left this sub-sector there is a need for short courses and certification to train people to fill the gaps. TA5 indicated the 'brain-drain' in the South African context where the sector lost valuable skills and knowledge.

Pre-COVID-19 the industry needed people that could handle big groups and mass tourism was important, but now, post-COVID-19, there is a need for people that can manage smaller travel groups (TA1).

The major themes that emerged include confidence with technology, personal characteristics and the 'brain drain'.

e. Attractiveness of the tourism and travel services sector for learners

From the discussions one theme emerged namely **optimistic but sceptic** at the same time. TA1 indicated that the sector is still attractive, but due to poor salaries, the students must be taught how to become entrepreneurs – they should create work for others. TA2 stated [TA2*… it will always be attractive if you have a destination that has got the potential that South Africa has*]. People are however cautions towards this sector after COVID-19 due to its unpredictable nature. Given the number of applications received by the institutions of higher learning it was indicated that the sector is still attractive (TA3). TA3 indicated that there will always be a need to travel either for business or leisure. TA4 stated [TA4…*I think it is definitely attractive, because the event sub-sector will always remain a dynamic and exciting sector, but there is scepticism*]. Students struggle to find placements and the sub-sector wants experienced staff. TA5 agreed that the sub- sector is still attractive with high enrolment figures, but whether it was the student's first choice of study is unknown. Post-COVID-19 being resilient, adaptable and taking initiative became more important. TA6 stated that the sector took a hard knock which is reflected in the enrolment statistics for tourism because of the uncertainty of the sector.

The major theme related to attractiveness evolved around optimistic but sceptic.

f. Challenges in the labour market related to the tourism and travel services sub-sector

On the question related to the challenges in the labour market the academics provided diverse responses.

The **balance between experience and theoretical knowledge** was stated by TA2 who indicated that there is a lack of quality and quantity training – [TA2…*many people are working in the sector but they are not educated in the sector*]. They have practical experience but no theoretical base which creates challenges for promotion or moving to other organisations. They also do not possess the soft skills and technical skills that are needed to operate in the sector.

Seasonality remains a challenge (TA1). From the employees' perspective, one only has employment during peak-season and from an employers' perspective, one only makes money during the peak season and it is a struggle to keep a reliable workforce over time.

Career choice was mentioned as a challenge. TA2 stated that studying tourism is most of the time not a persons' first choice – so these students/learners [TA2… *do not have the same drive, they do not have the same passion; just doing their job for having a job*].

Full recovery is a challenge with a **decrease in the number of people travelling** and also a significant decrease in jobs in the sector (TA3). It was stated that there's a **lack of skills in the sector**, such as information technology skills which are needed in the recovery phase. TA4 indicated [TA4…*an evacuation of our skills and experienced staff that had been in the sector and now we have the void*]. Succession was mentioned by TA5 as a challenge. She stated that the sector needs to train the youth whilst the older generation can still do this but also that the sector transforms to skilled employees. **Low salaries** are a challenge (TA6) with people moving to other sectors but also that younger people get the position due to their social media and technology skills – [TA6… *they are looking for young and* *innovative, fresh thinkers out of the box*].

The major themes focus on the balance between practical experience and theoretical knowledge, seasonality, career choice, lack of skills in the sub-sector and low salaries.

5.2.2.4 Future look of the tourism and travel services sector

a. Future of tourism and travel services as part of the tourism industry

On the question related to the future of conservation as part of the tourism industry the responses were clear. Firstly, the **importance of collaboration** (TA2, TA4) was stated. TA2 stated a positive outlook for the sector and emphasise the importance of collaboration with the sector. It was indicated by TA4 that this is a collaborative effort to get the sub-sector back on its feet.

Secondly, there is **a positive outlook related to growth** (TA1; TA3). based on the opinions of the interviewees. TA1 is very positive about the future of this sector in the tourism industry. There is potential for growth and the past few years led to the development of fresh ideas going forward. TA3 indicated that the [TA3…*future is very, very bright*]. This sub-sector is creating significant value for the tourism industry and so one needs to grow it for the future. TA6 indicated that the sector will grow but a different profile of tourists might develop. It might also be that people stay longer in South Africa since they can work remotely. The digital nomad visa is a wonderful idea as it will also people to say longer, work from here while travelling. These are the new trends in the tourism industry that the sub-sector can exploit.

Challenges such as infrastructure, corruption, safety and security should be addressed. TA5 mentioned the importance of sustainable practices that are not a greenwashing exercise.

The major themes include collaboration and positive outlook related to growth.

b. Level of professionalisation of occupations in the tourism and travel services sector

It was clear from the responses that there is overwhelming **support for professionalisation**. Professionalism will be a challenge in this sector since there is no public body that controls measures in this regard- [TA1…*private individuals are doing their own things in their own time*]. TA2 supports the professionalisation of certain occupations in the sector. TA3 stated that with some occupations such as tourist guides one might take the route or professionalisation. There is a definite move in the events sub-sector to move closer to professionalisation. Depending on one's training, work experience, education and work ethics one can be certified as an Event Practitioner or certified as an Event Professional. TA6 indicated that professionalisation will influence the quality offered in the sub-sector and consider it necessary.

The major theme includes support for professionalisation.

c. Important aspects of developing this sector

In this section the participants could indicate the aspects that are important in developing the tourism and travel services sub-sector. It was stated by TA1 that the sub-sector needs to diversify otherwise it will stagnate and visitors will lose interest – [TA1…*you cannot diversify unless you think out of the box*]. The involvement of the government was stated as important as well as the development of rural tourism (TA3). Collaboration was highlighted by TA4 and TA5 as important in moving this sub-sector forward. TA6 stated that institutions should create awareness about what this sub-sector entails since several learners do not get exposure to travel at home or at school.

The major themes include rural development, collaboration and exposure to the industry.

5.2.3 The tourism and travel services sector: A government and quasi-government perspective

5.2.3.1 Background to the involvement of government in the tourism and travel services sector

The participants were drawn from a variety of government and quasi-government organisations as can be seen in Table 5.3.

Table 5.3: Position and core responsibilities

POSITION	CODE	RESPONSIBILITIES AND DURATION
General Manager	TQG1	Managing a non-profit industry association (4 years)
Chief Executive Officer	TQG2	Managing a major tourism association
Chief Executive Officer	TQG3	Managing a major tourism association
Personnel Officer	TG1	Economic Development Programme
Tourism development manager	TG2	Provincial Government Department (5 years)
Health and safety officer	TG3	Provincial Tourism Organisation (3 years)

The participants have vast experience in the tourism and travel services sub-sector.

5.2.3.2 The tourism and travel services landscape

a. Changes in the labour landscape and occupations

It is important to understand the labour landscape and possible changes to this environment and therefore the discussion focused on possible changes in the landscape. Firstly, the importance of **appropriate training** was emphasised. TQG2 indicated that more specialised skills would be needed going forward. It is important to find a balance between practical and theoretical skills. TQG3 indicated that the labour landscape changed [TQG3…*it has changed significantly*]. TG3 indicated that the government need to provide more support related to skills training. TG1 indicated that technology and the online environment had changed the labour landscape and anyone entering the sector and industry must have knowledge and skills in this regard. TG2 indicated that the fourth industrial revolution brought significant changes with aspects such as digital marketing now being more important than ever. She also stated that the content in curriculums should be relevant to what is happening in the sector today.

Secondly, **loss of time and expertise** was deducted from the discussions. TQG1 stated the slow recovery of the sub-sector as a challenge. The sub-sector lost experience and knowledge and is struggling to appoint people with the necessary skills and experience again. TQG3 stated that the industry should recover first and thereafter, occupations will be reviewed.

TQG3 stated that when people enter the tourism industry, they want to travel but there are only a few people that actually travel whilst working in this industry – it is important that people understand the landscape of tourism in terms of the complete value chain. This leads to **unrealistic expectations**.

The major themes that emerged are relevant training and loss of time and expertise and unrealistic expectations .

b. Development or accreditation of qualifications in the tourism and travel services sub-sector

Based on the responses from the interviewees it was clear that all participants **support training** and/or are involved in **creating opportunities** for stakeholders to be trained. It can also be deducted that these participants and their organisations do not do accreditation of qualifications.

TQG2 indicated that they do development in terms of unskilled community members where they partner with organisations to assist in the training – rural incubator programme and entrepreneurship programmes. The association runs a number of initiatives related to training. TQG3 are involved in internships; they do not do training or accreditation. It provides additional resources to the company and adds experience to the curriculum vitae of the learner/student. TG1 does not present any training but realise the need for that. TG2 is not involved in accreditation but in the training of SMMEs by accredited service provides. Internal training was mentioned by TG3 but also external training by specific service providers.

The major theme that emerged is a need for and support of training.

c. Type of skills needed to work in the tourism and travel services sub-sector

From the discussions reference was made to:

Higher level expertise: financial management, strategic management; labour relations (TQG2), entrepreneurial skills are important so that people can establish their own businesses – [TG2…*establish their own businesses, other than looking for jobs from the government].* **Basic skills:** soft skills with reference to communication skills (TQG3) and problem-solving skills (TG3).
Personal characteristics: having the right attitude (TQG3).

TG1 stated that social media plays an important role in the sector and employees need to know how to utilise this tool to be present and visible. It is also important to stay in touch with clients and business contacts. TG3 stated that knowledge is needed related to compliance in terms of health and safety to protect both employees and visitors.

The major themes that emerged are higher level expertise, basic skills and personal characteristics.

d. Changes in skills pre- and post-COVID-19

On the topic of skills opinions were raised around **higher order skills** and **basic skills.**

Firstly, with regard to **higher level expertise** (TQG3) it was stated by TQG3 that knowledge and experience in account management and sales, yield management, ability to operate in a digital space, social media are important. Added to this he indicated the importance of employees understanding their role in making the event a success - [TQG3…*more importantly when people arrive at the* *establishment, people who are friendly to understand that the customer who just arrived is the one that pays the salaries*]. There is a gap in the events sub-sector related to technical skills and skills needed by the professional conference organiser and the one event organiser – transforming from a 300-exhibitor event to a 5000-exhibitor event (TQG2).

Secondly, with regard to **basic skills** TQG3 stated the importance of communication skills. After COVID-19 TG2 indicated the importance of digital skills and to familiarise oneself with the digital world.

The major themes that emerged include higher level expertise and basic skills.

e. Changes in occupations related to the tourism and travel services sub-sector

In the discussions related to occupations it was noted that the **optimisation of skills** is important in the future. It is the opinion of TQG3 that there might not be new occupations, but there might be a shift with companies determining how they can maximize the skills that are available internally. TQG1 indicated that occupations related to customer service and communications are very important.

New occupations will demand **higher levels of creativity** for example TG1 mentioned the creation of virtual tours as an important consideration moving forward – people can be in the comfort of their own home and enjoy destination experiences. Employees are needed to create this content and distribute globally.

TG2 stated that positions such as an information officers might not be needed any more since all the information is available online. TQG2 also indicated that occupations would change but did not state which changes she foresees. TG3 stated the challenges related to retrenchments which limits the workplace and now employees need to do more than pre-COVID-19. In the current operations the businesses are focused on ensuring safety of tourists.

The major themes that emerged include optimisation of skills and new occupations will demand higher levels of creativity.

5.2.3.3 Labour-related information

a. Changes to the labour profile related to the tourism and travel services sub-sector

On the question related to the changes to the labour profile two themes emerged namely well-equipped students to enter the industry and a changing business environment.

Firstly, **well-equipped students** (TQG2, TQG3) are needed to enter the industry. TQG2 stated that there are changes to the labour profile. Students enter with a good theoretical background but lack practical industry skills. TQG3 stated that employees would need to do multiple things – multiple skills. Even though technology is growing, and robots can provide certain services, there will always be a human element linked to this sector.

Secondly, the **business environment has changed** which demands different behaviour from employees (TG1, TG2). TG1 indicated that the balance between domestic and international tourists is new to some tourism products. Employees must ensure both target markets are happy and get what they pay for. It is interesting that at some accommodation establishments meal vouchers are given to the guests since they do not have people preparing food at the establishment anymore (TG2) – those employees are not needed and need to find work somewhere else. There are thus less people working at such an establishment which changes roles and responsibilities.

The major themes that emerged include well-equipped students and a changing business environment.

b. Attractiveness of the tourism and travel services sector to students and learners

The majority of the participants indicated that the sub-sector is not attractive to students and learners (TQG2, TQG3, TG2). TQG2 indicated that the sector is not attractive due to the number of jobs that were lost and the recovery of the sector – new business models are needed, and businesses need to deal with constant changes. TQG3 indicated that the sector is not attractive to learners and students, with several graduated tourism students that are unemployed. On the other hand, there are students that did not study tourism but are working in this environment – depending on the requirements for the position. The latter was supported by TG1. TQG3 stated [TQG3…*a lot of young people do it as a default]*. A number of positions are available in rural areas which are not attractive to young people. TG2 indicated that it is not attractive since 80% of people that completed their training cannot find positions in the sector. Only TG3 indicated that the sector is still attractive as it is an exciting sector to work in.

The major themes that emerged include unattractive sector and available positions in rural areas.

c. Challenges related to labour in the tourism and travel services sub-sector

The discussion revealed two themes.

Firstly, the **loss of expertise** due to COVID-19 was evident (TQG2, TG2, TG3). One of the challenges mentioned by TQG2 was the difficulty of luring people with significant experience back to the sector – lost people with between 15 and 20 years of experience, which is hard to replace. It was stated that retrenchments are a challenge as well as businesses that closed (TG2). TG3 indicated that the lack of a structure related to human resources in the sector makes recruitment difficult.

Secondly, the **unrealistic expectations of young people** entering the sub-sector. It was stated by TQG3 that young people do not want to work for lower salaries. He added [TQG3… *that everyone will go to the university, …, and then they want to be managers*]. TG1 indicated that there are companies that employ foreign nationals, and this creates challenges.

The major issues that emerged loss of expertise and unrealistic expectations of young people.

5.2.3.4 The future of tourism and travel services

a. The future of tourism and travel services as part of the tourism industry

Participants were positive about the future of the sub-sector with diverse ideas. TQG2 stated that the future lies in domestic tourism, and it is now important to review domestic tourism and determine how it can be more cost-effective and accessible. TQG3 indicates that [TQG3... *the future is bright*]. There was a positive outlook regarding the number of tourists, especially if crime can be managed. TG1 state that being driven by nature-based tourism is to the benefit of the country and this should be the focal point. The destination experience is different every time you visit a nature-based attraction. South Africa is cost-effective and seen as a value-for-money destination. There is an opportunity to introduce new attractions. TG2 stated that it is difficult for airlines since the economic crises but sectors like hospitality will flourish. She indicated a bright future for conservation as well since – [TG2…*conservation is believed to be the solution to the global climate crises. So, the more we conserve means that the more tourism will benefit through conservation*]. TG3 stated the need to train employees and upskill them in aspects such as marketing and infrastructure maintenance.

The major themes that emerged include domestic tourism, development of new attractions and the development of nature experience.

b. The level of professionalisation of certain occupations in the tourism and travel services sub-sector

On the discussions around professionalisation it was clear that this idea is supported. TQG2 indicated that the level of professionalism in the sector is high. It was indicated by TQG3 that those that want to work in the industry hold high levels of professionalism, but those that do not want to be in this industry lack this approach - especially young people. TG1 highlighted the current professional offerings in South Africa but also asked questions about benchmarks for the sector and to whom we benchmark. The standards, however, need to be regulated to ensure excellence in service delivery.

The major theme that emerged are good fit with the sector lead to high levels of professionalism.

c. Aspects to consider as important in developing the tourism and travel services sub-sector

Participants shared a variety of ideas on what should be done to develop the sub-sector. The main idea focusses on the need for new developments. TG1 indicated that SA could learn from neighbouring countries such as Kenya and Egypt and what they offer in terms of the sector. Emphasis was placed on the further development of township tourism and how tourists should be encouraged to make the township a first stop where they can not only do tours but also use restaurants and accommodation and thus spend more money in the area. TG2 indicated that conservation should be developed and supported as well as heritage and communities. TQG2 stated that communication is a major challenge – carefully consider how experiences are sold. She also indicated limited interaction with CATHSSETA although there is a willingness to work together.

The major theme that emerged include the need for new developments.

5.2.4 The tourism and travel sub-sector: An employee perspective

5.2.4.1 Overview of the status of the tourism and travel services sub-sector

a. Background to the position in the business

The participants were drawn from a variety of organisations as can be seen in Table 5.4.

Table 5.4: Position and core responsibilities

POSITION	CODE	RESPONSIBILITIES AND DURATION	QUALIFICATIONS
General Manager	TEe1	Managing all the operations (5 years)	In-house training in event management for 1 year
Financial Director	TEe2	Managing all finance related matters (2 years)	Degree in Accounting Sciences
Founder of the company	TEe3	-	Engineering Qualification
Chief Executive Officer	TEe4	Overseeing all aspects of the business	B Com in Economics
Microcontroller	TEe5	Did not indicate	Degree
Concierge	TEe7	Did not indicate	None
Tour guide	TEe8	Facilitating tours round SA	Certificate as a tour guide
Beverage controller	TEe9	Currently managing beverages at a private game reserve	None
Public relations officer	TEe10	Marketing, mentorship and training	Inhouse training with SATOUR
Marketing Destination officer	TEe11	Marketing activities	National Diploma in public relations

The participants have vast experience in the tourism and travel services sub-sector. It is also noted that for the higher-level positions more formal qualifications were obtained. There are cases where employees did not have any formal or information training.

5.2.4.2 Labour-related information

a. Qualifications and training

TEe1 did a formal one-year in-house training in event management with the organization FWA. TEe2 has a degree in accounting science and completed his/her articles with KPMG and BDO. The person is currently studying MBA and he/she may complete the programme in one year. TEe4 has a BCom in economics and one NDP. TEe5 has a degree from NWU. TEe8 has a certificate as a tour guide. TEe10 completed an in-house course in Tourism Marketing with SATOUR in 1976. It was preparation for promoting South Africa as a desired destination to overseas markets. TEe11 has ND in Public Relations. Then, he/she did journalism.

The major themes that emerged are diverse qualifications and not all are directly related to this sub-

sector.

b. Appropriateness of qualifications and skills

On the question whether their participants qualifications and skills were adequate to their positions two themes emerged namely the value of qualifications and the value of practical experience.

The **equal importance of qualifications and practical experience** (TEe1, TEe2, TEe3, TEe4, TEe7, TEe8, TEe9, TEe10, TEe11) was indicated. TEe1 affirmed that he had the skills and knowledge necessary for the work. TEe2 said the industry is complex and there is a difference between the knowledge acquired at a higher learning institution and practice in the industry. Thus, one must apply ones' mind to apply the knowledge and skills learned through further education. TEe3 is not doing what is related to his qualifications, he relies on the experience he gained. TEe4 indicated that a person can get the basic knowledge with the practice when he is in the position. TEe7 is confident that the knowledge and skills completed were suitable for the work as he expressed that he managed to work overseas and also gained international exposure.

TEe8 admitted that his qualification equipped him with relevant skills for the work. He mentioned that the people should focus on life-long learning in this sub-sector (TEe9). TEe10 acknowledged that the qualifications equipped him with the necessary skills for the work, but he added that his many years of experience helped him improve the skills. TEe11 feels like he works in the tourism industry because of the relevant knowledge and skills he acquired from further training as he expressed: [TEe11…*I moved into journalism, from journalism I went into corporate marketing, Ok. And then corporate marketing I was like, you know what, I am interested in tourism, and tourism is basically marketing another product. So, I really do feel that you know, my PR was a good foundation for myself*].

The major themes from the discussions is equal importance of qualifications and practical experience in this sub-sector.

c. Feedback on training and skills

The participants were asked to provide feedback on their training and skills from which two themes were identified namely expansion of the qualification and the importance of practical experience.

Firstly, participants supported current content but also **recommended additional content** (TEe1, TEe2). TEe1 feels like more can be done, especially management-related training such as project management. TEe2 holds a Bachelor's in accounting and suggests that knowing costing techniques is important in the tourism industry – [TEe2…s*o this industry is very cost driven as much as this revenue, your margins only come through by you managing your costs. So proper cost management training or quote needs to be stressed as to how you can actually utilise it in real life situations*].

Secondly, the **importance of practical experience** was emphasised (TEe3, TEe5, TEe10, TEe11). TEe3 has engineering qualifications but grew into managerial positions due to job training and small courses. TEe5 suggested that students be exposed to the hospitality industry for at least six months for them to be prepared. TEe10 believes that training institutions prepare students to enter the industry, but they have a lot to learn once they start interacting with clients. Similar to this learning while at real work, TEe11 feels that they should have been exposed to real work to gain experience and confidence – [TEe11…a*nd they'd really, really, really don't actually give you the realistic sense of what you are going to be jumping into. So, when I got my first job to assist conference project manager, and I was like, oh my gosh, it was I was in cold water. I was like, oh, is this hear it means work? I was so unprepared; I was very unprepared. And so, if I just feel that, you know, maybe they should have exposed us to maybe job shadowing, or tie assignments to the practical world*.

TEe8 is a qualified tour guide in Eastern Cape. He feels like offering online classes would be beneficial because some people cannot afford to attend classes every day. It was recommended that training institutions should encourage students to consider being rangers as a career instead of focusing mostly on hospitality (TEe9).

The major theme is related to recommendations on additional content to qualifications as well a practical experience.

d. Changes in occupations/positions due to COVID-19

The discussions related to changes in occupations and positions resulted in two themes namely changing business operations and survival actions.

Firstly, due to the effect of COVID-19 some **business operations had to change**. TEe2 who is the financial director acknowledged that COVID-19 changed a lot of things in the industry and mentioned he was lucky to have joined the industry before COVID-19. Because he knows how the industry was doing financially pre-COVID-19. After COVID-19 the business is run slightly differently – [TEe2…*The mix of how we employ or deploy skills and resources had to change your delivery and food costs. All of that had to be looked at supplies so that you can get to a position where you are not spending more than* *what you*]. TEe1 says that most clients are struggling to come back, and the company used to have many functions, but they are now reduced to almost half due to COVID-19. TEe8 changed many things including the number of customers that could attend events.

Secondly**, business survival techniques** were mentioned. TEe3 said that the business did not have an income for about 18 months, but it survived. TEe4 said that COVID-19 made businesses think innovatively and think outside the box to ensure that they generate more income. Businesses also focused on technology and other strategies that help businesses to survive in the circumstances like COVID-19.

According to TEe10, COVID-19 affected the sub-sector to the extent that some travel suppliers did not survive. TEe11 who works in a tourism-related association said that the number of members declined more than half from 100 to 45. Some of their members have closed doors, others do not want to pay a membership fee as it is seen as a luxury.

The emerging themes are changed business operations and business survival techniques.

e. Critical core skills for the world of work

Participants had diverse but also overlapping opinions related to general skills and sub-sector skills needed.

General skills needed:

- Soft skills (TEe2) – kind, good listening skills (TEe3), emotional intelligence, strong self-efficacy, and confidence – [TEe2…So*, I think, yeah, soft skills and critical thinking over and above your financial or educational knowledge is key]*.
- Conflict management (TEe1)
- People skills (TEe4, TEe8)
- Communication skills (TEe5, TEe7, TEe8, TEe9)
- Teamwork (TEe7)
- Analytical and critical thinking skills (TEe9)
- Interpersonal skills (TEe9, TEe10)

Sub-sector related skills needed:

- Project management (TEe1)
- Technical skills (TEe2)
- Customer service (TEe2)
- General management (TEe4)
- Financial management TEe4)
- Human Resources management (TEe4)
- Marketing management (TEe11)

The major themes that emerged is general skills with reference to soft skills and communications skills and sub-sector related skills with reference to a management focus.

f. New skills needed to work in the tourism and travel sector (pre- and post-COVID-19)

Participants were asked to name any new skills that might be needed to work in the tourism and travel service subsector. A variety of skills are mentioned below with only one overlap namely marketing skills. It was clear that life-long learning is important in this sub-sector.

TEe1 feels that financial management and project management skills are important. TEe2 wants to acquire emotional intelligence skills for himself because it will help him in interactions with clients and staff members. TEe4 mentioned that he has been in his current position for a long, but he learns new things all the time. He recommends that a person has to keep up with legislation, health, and safety protocols. It was added that one must check up with technology and have networking skills. Interestingly, TEe5 mentioned the need of using all of South Africa's official languages because a client may call in any language of their choice. He added that there is also a need for marketing skills. TEe10 emphasizes that employees must update their marketing and sales skills for them to respond to the market, which constantly changes. The skills mentioned by TEe11 are communication, interpersonal, and public speaking.

The needed skills in the sub-sector include marketing management among other management functions and the importance of this being a process of lifelong learning.

g. Up-skilling of the employee in the tourism and travel sector

The discussions around up-skilling focused on internal and external up-skilling.

Firstly, **internal upskilling** is supported by the majority of participants. TEe1's organisation provides employees with training opportunities sometimes if they are not busy. TEe4 mentioned that training on teamwork is provided to keep staff positive. But the organization focuses much on training related to strategic planning and financial planning. TEe5 said that training on handling client's complaints is provided.

Secondly, **external up-skilling** is also supported by the majority of participants. TEe2 is doing an MBA, which is a formal qualification so he can get a clear understanding of how to run a business. His organisation also provides employee opportunities to acquire different skills like project management, marketing, and sales. Some employees went to university to study for a degree. Speaking foreign languages such as Spanish and Swahili is seen as a new skill that is needed in the tourism industry because some tourists are non-English speaking (TEe7). This participant said that his organisation offers English, Spanish, and Swahili classes, and he can speak Spanish and Swahili.

Unfortunately, TEe8's organisation is a small one, it does not upskill its staff. TEe11's organisation makes a great contribution to skills development as it gives students internships. Giving students the training, they need, is the way the organization pays back to the community.

The major themes focus on internal upskilling and external upskilling.

5.2.4.3 The future of the tourism and travel workplace

a. The future of work

Regarding the future of work the responses were overwhelming positive with two major themes namely a positive outlook on the future of the sub-sector and challenges to overcome in the future world of work.

Firstly, a **positive outlook** from the employees is satisfying (TEe1, TEe2, TEe3, TEe4). TEe1 is not worried about the future of work because people are starting touring, and he believes that touring will get bigger and bigger in the near future. He added that he sees himself as part of the industry as he is growing with the tourism industry. As an accountant working in the tourism industry, TEe2 feels safe, and not worried about losing his job even though he joined the tourism industry by mistake. He said that accounting skills are still needed in the tourism industry, unlike other industries which can outsource an accountant at a cheaper rate than hiring a full-time person. But the tourism industry cannot outsource someone who comes and do the work of this nature of the industry. TEe3 sees tourism as a huge industry that has the potential to contribute to GDP and create jobs. The participant believes that the tourism industry can expand. TEe4 believes that South Africa's tourism has a lot of potential because it has diverse products with good weather. TEe7 has no doubt that the future of the tourism industry is bright, and it will be a major driver of the economy. Similarly, TEe8 said that the tourism industry is expanding, and he plans to expand his business to townships. TEe10 sees tourism as a major contributor to the country's GDP and the creation of job opportunities.TEe11 also believes that the tourism industry has a bright future because it has a lot to offer as expressed below – [TEe11…*You know, South Africa, a lot of people love our climate because there are so many things to do, There are so many packages, there are so many ideas that we can make them work in order to get money into the country*].

It is true that there are certain **challenges** that the sub-sector needs to address (where possible). TEe4 indicated that critical problems such as load shedding and poor infrastructure need to be fixed. TEe9 is worried that the industry may experience a shortage of qualified employees because students may lose interest in the industry as expressed below [TEe4…I *feel like we may end up not having more students interested in the industry because of two things that I've realized. One, we have the mentality that the industry is not calling because most people are qualified to do what they learned at school, they actually do it. Number two, the youth currently is more focused on monetary benefits than building their career]*. The participant added that students have the idea that the sector is an industry with no growth. Consequently, the participant suggested that the industry must shift the demand, or demand for people who are more focused on a career in the tourism industry.

The major themes that emerged are a positive outlook for the sub-sector and the need to address certain challenges.

b. Other aspects stemming from involvement in the sub-sector

The participants could indicate any other aspects related to the development of the tourism and travel services sub-sector and the ideas are diverse. Participants are recommending creation of events, the improvement of collaboration between stakeholders and the promotion of new careers in this sub-sector.

TEe1 sees the protection of natural resources and the environment as important in developing the tourism and travel sector. TEe2 believes that improving communication. Another important aspect in developing the tourism industry according to TEe4 is the collaboration between cities and provincial governments to avoid hosting big events at the same time. The participant also suggests that organizing big events in major cities would boost the industry. TEe7 believes that creating opportunities for young people, providing them with resources, and opening doors for them are critically important to tourism. Currently, this one is lacking in tourism. TEe9 suggests that the tourism industry should promote new careers instead of focusing on traditional ones like travel agencies and tour operators. TEe10 believes that the tourism industry has the potential to expand and create many jobs. According to TEe11, infrastructure is important in tourism development, but most tourism infrastructure is ailing, especially roads that are full of potholes. Another important aspect is supporting students to get experiential training. College and university students need to be given opportunities, so they gain work experience.

Other aspects considered to be important include creation of events, the improvement of collaboration between stakeholders and the promotion of new careers in this sub-sector.

5.3 QUANTITATIVE RESULTS

The quantitative research results are focused on the questionnaires distributed to role-players in the tourism and travel services sub-sector.

5.3.1 Employee responses

5.3.1.1 Employee profile

Table 5.5 summarises the employee profile of respondents.

Table 5.5: Employee profile

Demographic characteristic			Demographic characteristic	
Age	**Percentage**		**Citizen**	**Percentage**
18-24	16.33%		South African	**97.92%**
25-34	57.14%		Foreign national residing in South Africa	2.08%
35-44	14.29%		**Race**	
45-54	2.04%		Coloured	24.49%
55+	10.20%		Black African	57.14%
Gender	**Percentage**		White	18.37%
Female	**71%**		Indian/Asian	-
Male	29%		**Any form of disability**	

Non-binary	-		Yes	2.08%
Highest qualification			No	97.92%
Non-formal education	6.25%		**Monthly income**	
General Education (High School)	14.58%		Much below-average income	15.91%
Certificate	18.75%		Below average income	22.73%
Tertiary Diploma	37.50%		Same as average income	18.18%
Bachelor's Degree	10.42%		Above average income	18.18%
Postgraduate Degree	12.50%		Much above average income	-
Province			Rather not say	25.00%
Limpopo	1.82%		**Platform used to obtain information about the sub-sector**	
Free State	5.45%		Television	11.43%
North-West	18.18%		Print media (newspaper/magazine)	13.57%
Northern Cape	-		The internet	25.00%
Western Cape	45.45%		e-Word-of-mouth (Websites, Facebook, Twitter, Instagram)	15.71%
Eastern Cape	23.64%		Word-of-mouth (friends, work colleagues)	18.57%
Gauteng	5.45%		Travel/trade shows	13.57%
Mpumalanga	-		Do not receive any	2.14%
KwaZulu-Natal	-			

From the employee profile it was evident that respondents were mostly black (57%), South African (97%) females (71%) between 25 and 34 years of age (57%) working in Western Cape (45%) and Eastern Cape (23%) provinces. In terms of qualification, the respondents held a Tertiary Diploma (37%) and indicated that they earn below the average income (16%) whilst 25% rather not say. Most of the respondents studied at Walter Sisulu University followed by the University of the Free State, Nelson Mandela University, University of South Africa, University of Venda, and the North-West University. There were also a higher number of respondents that enrolled at colleges such as Swiss Hotel School, Prestige Business College, Vuselela TVET and MSC College. In terms of positions, most of the respondents are employed in administrative positions, followed by driver, tourism officer manager, intern, student assistant, client liaison, and sand kills developments programme admin. They have been working in these positions on average for 42 months (3.5 years). It might also be attributed to COVID-19, like in other sectors, since there has been some level of stagnation where less vacancies are available, and people are hesitant to move to another position during these difficult economic times. When searching for information related to the sub-sector, they primarily consult the Internet.

5.3.1.2 Knowledge and skills important to the workplace

a. The importance of certain aspects related to conducting one's work

Table 5.6 summarises employee aspects considered to be important.

Table 5.6: Importance of certain aspects related to conducting one's work

Aspects	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
To have the relevant qualification and training	-	7.27%	12.73%	43.64%	36.36%	4.09
To have practical experience before commencing	3.57%	7.14%	16.07%	44.64%	28.57%	3.88
To have a mentor	5.45%	1.82%	14.55%	43.64%	34.55%	4.00
To up-skill yourself	1.79%	-	8.93%	44.64%	44.64%	**4.30**
Sufficient resources	1.79%	-	16.07%	35.71%	46.43%	**4.25**

The importance of upskilling is evident from the table ($\bar{x}$=4.30) as well as having sufficient resources to conduct the work ($\bar{x}$=4.25). Still important, but least important for this list having practical experience before commencing work yielded a mean value of 3.88.

b. Importance of skills in doing ones' work effectively

Table 5.7: Importance of skills related to effective work

Skills	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Customer service skills	-	3.51%	8.77%	29.82%	57.89%	4.42
Networking skills	1.82%	1.82%	10.91%	30.91%	54.55%	4.35
Verbal communication skills	-	1.82%	3.64%	32.73%	61.82%	**4.55**
Written communication skills	-	5.36%	12.50%	28.57%	53.57%	4.30
Flexibility skills	-	5.56%	12.96%	35.19%	46.30%	4.22
Organisation skills	-	-	22.22%	31.48%	46.30%	4.24
Language skills	-	-	11.11%	42.59%	46.30%	4.35
Commitment	-	-	7.27%	27.27%	65.45%	**4.58**
Can-do attitude	-	-	7.27%	32.73%	60.00%	4.53
Multi-tasking skills	-	-	16.67%	29.63%	53.70%	4.37
Cultural awareness	3.64%	3.64%	12.73%	38.18%	41.82%	4.11
Technology skills	1.82%	1.82%	20.00%	29.09%	47.27%	4.18
Empathy and emotional intelligence	-	1.82%	23.64%	38.18%	36.36%	4.09
Teamwork	-	-	8.93%	33.93%	57.14%	4.48
Stress management	1.82%	-	14.55%	32.73%	50.91%	4.31
Time management	-	-	9.09%	34.55%	56.36%	4.47
Problem-solving	-	-	9.09%	29.09%	61.82%	**4.53**
Listening skills	-	-	7.27%	29.09%	63.64%	**4.56**
Digital skills	1.82%	3.64%	16.36%	32.73%	45.45%	4.16

From the skills list (Table 5.7) it was clear that commitment was rated highly ($\bar{x}$=4.58), followed by listening skills ($\bar{x}$=4.56), verbal communication skills ($\bar{x}$=4.55) and problem-solving skills ($\bar{x}$=4.53). The least important skills in the view of the respondents were cultural awareness skills ($\bar{x}$=4.11) and digital skills ($\bar{x}$=4.16).

c. Importance of certain characteristics in doing ones' work effectively

Table 5.8: The importance of personal characteristics

Skills	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Responsible	-	-	5.45%	29.09%	65.45%	**4.60**
Enthusiastic	-	1.85%	18.52%	31.48%	48.15%	4.26
Dedicated	-	1.82%	7.27%	36.36%	54.55%	**4.44**
Precise	-	1.82%	12.73%	25.45%	60.00%	**4.44**
Creative	-	11.11%	14.81%	27.78%	46.30%	4.09
Innovative	-	5.45%	16.36%	27.27%	50.91%	4.24
Independent	-	5.45%	16.36%	30.91%	47.27%	4.20
Sensitive	-	9.09%	23.64%	36.36%	30.91%	3.89
Professional	-	-	7.14%	25.00%	67.86%	**4.61**

On a personal note, respondents indicated (Table 5.8) the importance of being professional ($\bar{x}$=4.61), responsible ($\bar{x}$=4.60), dedicated ($\bar{x}$=4.44) and precise ($\bar{x}$=4.44). The least important skill was listed as being sensitive ($\bar{x}$=3.89).

5.3.1.3 The new world of work in the travel and tourism services sub-sector

Figure 5.3: Wordcloud for changes in the workplace because of COVID-19

It is evident (Figure 5.3) from the Wordcloud related to changes in the workplace that the word work (16 counts), and changed/change (12 counts) represent the highest counts. Respondents thus recognise the changes that took place due to COVID-19. Respondents indicate the following as changes:

- No changes were experienced in the workplace
- Salary reductions
- Job losses
- Salary cut/ Employees cutoff
- Loss of work
- Lost jobs & lives
- the way we communicate, a lot of people were unable to provide for their families
- work online
- Had to think out of the box / “took me out of my comfort zone”
- Could do some of the work from home
- Less visitors, less work
- Technology empowerment

5.3.1.4 Development of jobs in this sub-sector in the next few years

Figure 5.4: Wordcloud for the development of jobs in this sub-sector

The word jobs yielded 7 counts and tourism 6 counts (Figure 5.4), Respondents indicated that jobs will develop in the following lines:

- Move towards digital

- Equipment will improve
- New jobs are dependent on training
- Jobs are becoming more specialised and experience orientated
- High skills
- Gradual development
- Tremendous industry growth
- Increased reliability on tourism and hospitality-related jobs due to increased poverty and less jobs

5.3.1.5 Development of new jobs in the travel and tourism services sub-sector

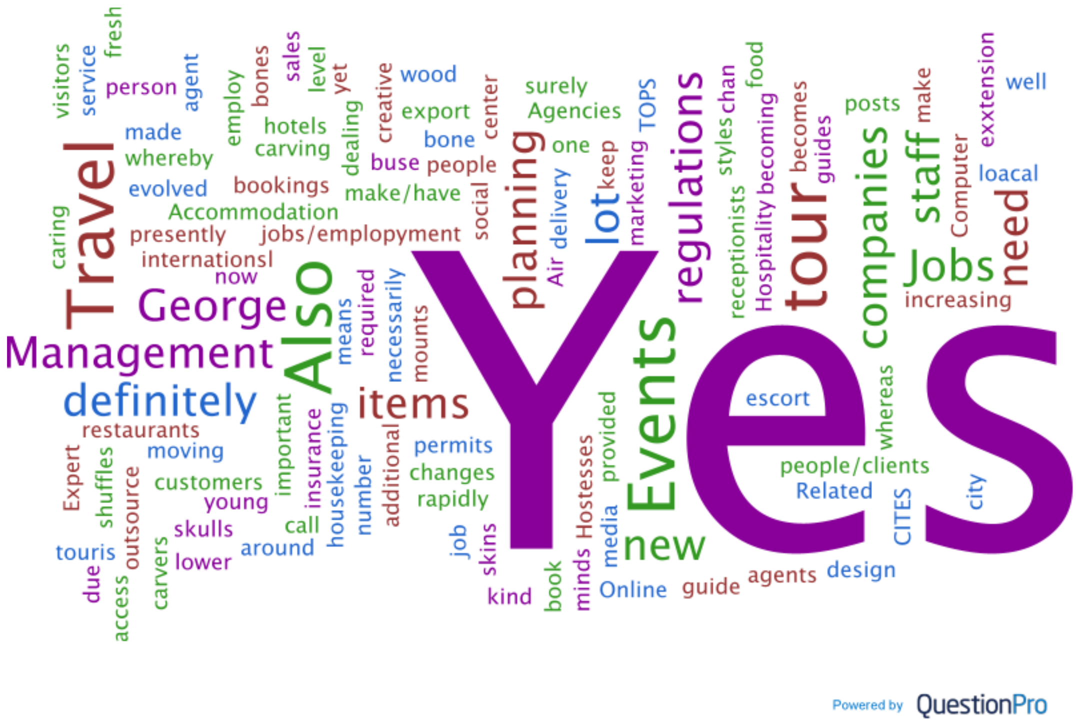


Figure 5.5: Wordcloud for the development of new jobs in this sub-sector

Respondents (Figure 5.5) indicated support for the word yes with 19 counts. A significant number of respondents also indicated that there will be no new jobs. Those that indicated a positive respondents identified the following related to new jobs:

- Positions related to travel insurance will become more specialised
- Knowledge and positions related to social media
- IT and computer-related jobs
- Hospitality services
- Housekeeping and receptionists, as well as marketing and social media

- Travel agencies, air hostesses, events management and planning, accommodation
- As this industry evolves and regulations change, new jobs will be created and others becoming more important
- IT and Computer Related Jobs

5.3.1.6 Long-term employment and opportunities available in the travel and tourism services sub-sector

Figure 5.6: Opportunities available in the sub-sector and long-term employment

On a positive note, the word yes yielded 30 counts indicated that the respondents want to work in this industry over the long term (figure 5.6).

For those that indicated yes, the following opportunities were identified

- The culinary experience is growing
- Enjoy working with people and contributing to their growth
- Hospitality offers different opportunities and one can move around between different departments
- There aComputer learning/training wan't part of the job but I improved
- Open my own establishment

For those that indicated not, the following reasons were given:

- The sector hires unqualified people and those with the qualifications do not get the work
- The working hours are too long
- There are no other jobs, so this was the only option
- The salaries and wages are too low
- No, because of my age
- There isn't much room for growth on the corporate ladder
- I enjoy the job, but the salary makes me feel stuck in life

Overall, respondents gave a positive response in terms of working in this sub-sector but a number of respondents indicated inhibiting factors such as working hours and low salaries.

5.3.1.7 Aspects to improve in the workplace on a personal level

Figure 5.7: Aspects to improve in the workplace on a personal level

The word yes, yielded 14 counts indicating (Fgure 5.7) that there are some aspects that employees want to improve on a personal level in the workplace. The respondents indicated a need to improve the following aspects:

- Marketing skills
- Communication skills
- Client satisfaction
- Computer literacy
- Management
- Up-skilling remains important

5.3.2 Employer responses

The quantitative research results are focused on the questionnaires distributed to employers in the travel and tourism services sub-sector.

5.3.2.1 Employer profile

Table 5.9 summarises the socio-demographic profile of respondents.

Table 5.9: Employer profile

Employer demographic characteristic		Demographic characteristic	
Age	**Percentage**	**Citizen**	**Percentage**
18-24	-	South African	100.00%
25-34	26.67%	Foreign national residing in South Africa	-
35-44	6.67%	**Race**	
45-54	33.33%	Black African	7.14%
55+	33.33%	White	71.43%
Gender	**Percentage**	Coloured	7.14%
Female	53%	Indian/Asian	14.29%
Male	24%	**Any form of disability**	
Did not say	23%	No	78.57%
Highest qualification		Yes	21.43%
Non-formal education	-	**Monthly income**	
General Education (High School)	13.33%	Single (never married)	14.29%
Certificate	26.67%	Married	50.00%
Tertiary Diploma	40.00%	Domestic partnership	14.29%
Bachelor's Degree	13.33%	Widowed	7.14%
Postgraduate Degree	6.67%	Divorced	14.29%
Province		Separated	-
Limpopo	-	**Platform used to obtain information about the sub-sector**	
Free State	-	Television	12.24%
North-West	17.65%	Print media (newspaper/magazine)	14.29%
Northern Cape	-	The internet	22.45%
Western Cape	52.94%	e-Word-of-mouth (Websites, Facebook, Twitter, Instagram)	18.37%
Eastern Cape	5.88%	Word-of-mouth (friends, work colleagues)	14.29%

Gauteng	17.65%		Travel/trade shows	16.33%
Mpumalanga	-		Do not receive any	2.04%
KwaZulu-Natal	5.88%			

From the employer profile (Table 5.9) it was evident that respondents were mostly white (71.43%), South African (100%) females (53%) and were aged 45 years old and above (66%). Most employers indicated possessing a Tertiary Diploma as their highest qualification (40%) and were based in the Western Cape (52.94%) and North-West (17.65%) and Gauteng provinces respectively. In terms of those with qualifications, the most cited institutions included University of Stellenbosch and Nelson Mandela University. Other respondents attended colleges, namely, The Nature College, Prisa, DEMELIN, Richards Bay College, Cape Town Academy, Imperium University, Damelin, Namnithi TVET. In terms of positions, most of the respondents are employed in managerial positions, followed by owners and assistant managers. One respondent was a skills development facilitator. Most have been working in these positions and in business on average for more than 3 years. When searching for information related to the sub-sector, they primarily consult the Internet.

5.3.2.2 Business Profile

Table 5.10 is the business summary of respondents.

Table 5.10: Business profile

Business characteristics	
Annual turnover of your business in 2021	**Percentage**
R500 000	21.43%
R1.5 million	28.57%
R3 million	14.29%
+R3 million	35.71%
Annual turnover of your business in 2022	**Percentage**
R500 000	13.33%
R1.5 million	40.00%
R3 million	13.33%
+R3 million	33.33%
Business Size (by Employees)	**Percentage**
Small: 0 - 49	66.67%
Medium: 50-149	20.00%
Large:150+	13.33%
Participation in CATHSSETA initiatives	
Yes	46.15%
No	53.85%

Most of the businesses surveyed (Figure 5.10) reported turnover of over R3 million in 2021 (35.71%), while the majority (40%) reported an annual turnover of R1.5 million in 2022, respectively, possibly indicating a slumping trend post-the-crisis. Employers were mostly small businesses by employee numbers (66.67%), with a significant proportion of them not (53.85%) participating in any CATHSSETA initiatives.

5.3.2.3 Skills important to the employers in the workplace

Table 5.11 summarises the importance of certain aspects related to skills expected by employers.

Table 5.11: Importance of certain skills related to conducting one's work

Aspects	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Customer service skills	-	11.79%	-	5.88%	82.35%	4.59
Networking skills	6.25%	-	31.25%	18.75%	43.75%	3.94
Verbal communication skills	-	-	-	18.75%	81.25%	**4.81**
Written communication skills	-	-	25%	18.75%	56.25%	4.31
Flexibility skills	-	6.25%	6.25%	18.75%	68.75%	4.50
Organisation skills	-	6.25%	6.25%	50.00%	37.50%	4.19
Language skills	-	-	5.88%	47.06%	47.06%	4.41
Commitment	-	-	6.25%	6.25%	87.50%	4.81
Can-do attitude	-	-	-	6.67%	93.33%	**4.93**
Multi-tasking skills	-	-	6.25%	31.25%	62.50%	4.56
Cultural awareness	-	5.88%	11.70%	35.29%	47.06%	4.24
Technology skills	-	36.25%	25%	31.25%	37.50%	4.00
Empathy & emotional intelligence	-	-	18.75%	25%	56.25%	4.38
Teamwork	-	-	-	37.50%	62.50%	4.63
Stress management	-	-	18.75%	37.50%	43.75%	4.25
Time management	-	-	6.25%	12.50%	81.25%	4.75
Problem-solving	-	-	-	25.00%	75.00%	4.75
Listening skills	-	-	-	12.50%	87.50%	**4.88**
Digital skills	6.25%	6.25%	25.00%	12.75%	43.75%	3.88

As shown in Table 5.11, the importance of can-do attitude is evident from the table ($\bar{x}$=4.93) as well as listening ($\bar{x}$=4.88) and verbal communication ($\bar{x}$=4.81) skills. Still important, but least important for this list is technology skills which yielded a mean value of 3.88.

5.3.2.3 Most important consideration when employing someone

Figure 5.8: Wordcloud for important consideration when employing someone

It is evident from Figure 5.8 that the Wordcloud related to employers' considerations that required attitude are the most prevalent consideration (4 counts), followed by skills (3 counts), as well as experience (2 count). Respondents thus consider the following:

- Certification and personality type
- Must be presentable and well-spoken with exceptional IT skills
- Experience and knowledge
- Team player, winning attitude, Time management, customer care, flexibility and Language skills
- Experience
- Attitude

It is evident that soft-skills are critical to employers in the travel and tourism services sector, particularly aspects such as IT skills, personality traits such as good attitude and certification.

5.3.2.4 Business changes due to COVID-19

Figure 5.9: Wordcloud for changes in the workplace because of COVID-19

It is evident from Figure 5.9, the Wordcloud related to changes in the workplace that COVID-19 affected businesses (2 counts) and income (2 counts) which represent the highest counts. Respondents thus recognise the changes that took place due to COVID-19. Respondents indicate the following as changes:

- Less walk-in business
- Less employees that have more skills across various departments
- Information centres were closed down
- Back-office team is currently able to work remotely on a twice a week basis.
- The whole sector had to re-adapt and think of innovate ideas
- Not enough staff members
- Difficult to get qualified staff in this sector as the best have left the industry and we need people with experience

The pandemic instigated changes in the travel and tourism services sector. Despite job and income losses in the sector, post-the-pandemic experienced staff member numbers are limited indicating some skills shortages.

5.3.2.5 Occupations/jobs evolving in your sector. New types of occupations/jobs developing in this sector in the next few years

Figure 5.10: Wordcloud for the occupation evolution in the sub-sector

The Wordcloud (Figure 5.10) safety yielded (3 counts) and adapt (1 count), Respondents indicated that jobs will develop towards safety and adaptability in the following lines:

- Many more marketing and social media related
- No unfortunately not in my business
- Visitor Safety within the destination and Community
- Allocating more tourism safety monitors
- No, just the way that the different job positions had to adapt and evolve
- Not sure as for now there is not enough motivation and security in this industry

There is a keen sense that the evolution of the travel and tourism services sector, like other sectors is predicated on the assimilation of new skills in the sector. Employers acknowledge that safety and security is now more critical, while also citing marketing and social media as being important.

5.3.2.6 The future of the travel and tourism services sector in South Africa

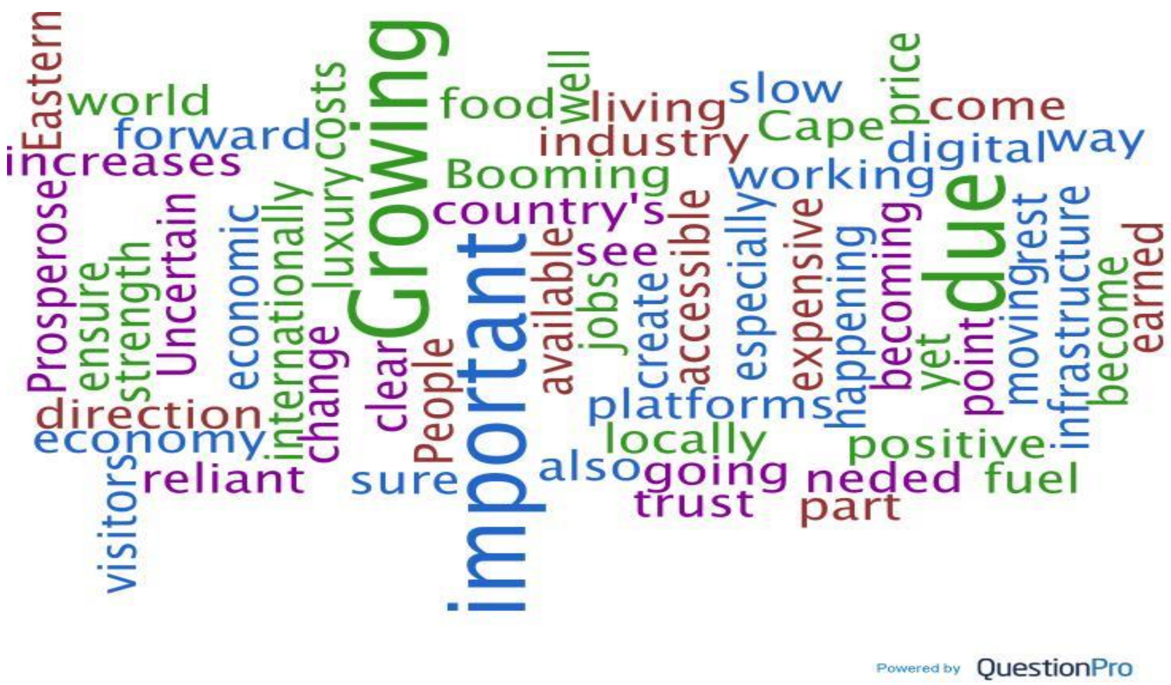


Figure 5.11: Wordcloud for the future of the travel and tourism services sector in South Africa

Respondents indicated growth (2 counts) in the future of the travel and tourism services sector. Accessibility is also noted (1 count). Respondents identified the following the future of the sector:

- Booming
- Growing
- Not very positive due to price increases in fuel and food and living costs
- The industry moving into the digital direction
- Very important part of the economy but also reliant on the rest of the country's infrastructure working well
- Uncertain due to what is happening all over the world

Respondents are mixed about the future of travel and tourism services sector. With growth moderated by economic challenges and uncertainty.

5.3.2.7 Scope of business

Figure 5.12: Wordcloud for the Scope of business

Key words extrapolated (Figure 5.12) suggest respondents were in destination-related businesses (6 count), tourism (4 count), and hunting (3 count). Scope of business response was a follows,

- Pleasure cruises
- Car rental
- Tour packages
- Tourism information, marketing, research, destination development
- Park
- Game Farm, Safari business (includes hunting and photographic safaris),
- Agricultural, Game and Guesthouse
- Cape Town Tourism
- Travel Management Company
- Destination management services
- Travel Agency
- Making Garments , Traditional wear , bead work

Overall, respondents and their scope of business represent the broad spectrum of the travel and tourism services sector.

5.3.2.8 Participation in CATHSSETA initiatives

Figure 5.13: Wordcloud for the participation in CATHSSETA initiatives

The words training (2 count), and development (1 count) indicate extent of participation of respondents in CATHSSETA initiatives as employers. The respondents indicated the following aspects:

- CATHSSETA guide
- In-service training for students
- Training and development
- Learnerships

Respondents indicate that they are aware of some CATHSSETA initiatives and participate primarily in learnership and providing students with practical skills via experiential learning.

5.3.2.9 Involvement in discussions related to policies

Figure 5.14: Wordcloud for the involvement in sector related to policies

Most respondents indicated no participation in sector policy formulation processes. However, some did, thus the word involved with 4 counts. Respondents indicate that:

- Not involved at all
- Cape Town Tourism's CEO served on the South African Tourism Board
- Not too involved

While most respondents were not involved in policy formulation, those that were indicated that they do so mainly through their direct involvement in boards.

5.3.3.10 Sector organisations and association membership

Figure 5.15: Wordcloud of sector organisations and association membership

The prevalent words from the Wordcloud (Figure 5.15) are member (5 count), SATSA (3 count) and member (3 count). Individual responses suggest membership of established South African and international associations, as respondents indicated:

- SATSA member
- None
- Cape Town Tourism partners with FEDHASA, SATSA, ASATA and the United Nations World Tourism Organisation
- Association for Skills Development in South Africa (ASDSA)
- IATA - member ASATA

Most of the respondents indicated being a part of South African associations. With a minority indicating that they were not affiliated to any organisation.

a. Additional thoughts

Figure 5.16: Wordcloud of Additional thoughts of respondents

When solicited for any additional thoughts, the Wordcloud (Figure 5.16) indicates words such as industry (3 count), becoming (3 count) as future reference and changes (1 count). Some key responses however included,

- Ever-changing
- The Tourism industry is a fast growing and constantly evolving.

- This industry has become very difficult to manage due to constant changes and happenings all over the world
- Not many people are motivated to enter the industry any more
- Always stay innovative and respect your culture

Respondents identify challenges associated with global forces, and that post-the-pandemic not may people want to enter the travel and tourism services sector as the sector has become more difficult to manage.

5.4 DISCUSSION OF THE RESULTS

5.4.1 Employee and employer discussions

a. Understanding the status of the tourism and travel services sub-sector

In the post-COVID-19 environment many changes (Table 5.12) took place which influenced the tourism and travel services sub-sector. The effect of technology in this changing environment was clear. Especially, in the case of events where hybrid events took over the sector for some time and the question is whether these hybrid events will stay or whether the sub-sector should move back to face-to-face meetings and functions. The human element however remains important in this sub-sector. Business in this sub-sector had to change their business models to survive which meant presentation of smaller events and focusing more on the needs of the customer. There was a realisation of a new customer but who this new customer is and what they expect is unknown. In relation to the economic performance of the sector there is optimism about the domestic market and the possibilities around this, almost new, market. One opportunity is the fact that people want to travel after COVID-19 and this need should be unpacked and capitalised on. As an inhibiting factor the lack of a clearly communicated recovery strategy was challenging and this made the recovery process much more difficult. This should not happen again, and the sub-sector should be prepared for such unfortunate events. Even with the positive outlook employers are worried about the effect of poor infrastructure on tourists choices, supported by most participants. An intervention is needed between the tourism sector and other relevant sectors to resolve this problem as it will deter people from travelling. Another concern is the poor monitoring and policing of illegal operators – they take business away from those operating according to the rules and regulations.

Table 5.12: Employer voice

EMPLOYER VOICE		
Changes in the sector	**Economic performance of the sector**	**Challenges in growing the sector**
• Technology that affected and changed this sector • Change in business models • Changing consumer and their expectations	• Value of the tourist market • Inhibiting aspects	• Infrastructure • External factors

Table 5.13: Education and training related to the tourism and travel services sub-sector

EMPLOYER VOICE	EMPLOYEE VOICE	GOVERNMENT AND QUASI-GOVERNMENT VOICE	ACADEMIC VOICE
			Changes in the educational landscape
			• Changing teaching landscape • Importance of being relevant
Types of qualifications	**Qualifications and training and appropriateness of these**	**Development/Accreditation of qualifications**	**Qualifications**
• Higher level qualifications • Practical experience • Attitude • Qualifications are linked to the type of position	• **Equal importance of qualifications** • **Practical experience in this sub-sector** • **Recommendations on additional content to qualifications**	• There is a need for and support of training in this sector	• **Availability of high-level qualifications** • **Professional skills, professional attributes and soft skills.**

Skills	Skills	Skills	Skills
• Dealing with customers • Soft-skills • Technology skills		• Higher level expertise • Basic skills • Personal characteristics	• Well-being of employees • Improvement of digital skills
Up-skilling	**Up-skilling**		**Curriculum changes**
• Support for continuous upskilling • Long-term investment in staff	• **Internal up-skilling** • **External up-skilling**		• Re-curriculation • Consult with the relevant role players
			Role of the Department of Higher Education in development of programs
			• Difficult process to change programmes

Participants (Table 3.13) in academia noted significant changes in the educational landscape. The online environment created opportunities for higher education institutions. With the lack of standardised qualifications in this sub-sector it was noted that students that study the same type of degree might have different skills and knowledge levels after completing their qualifications – this issue should be addressed by writing minimum content requirements for certain programmes. With the changing sub-sector landscape, it was realised that one needs to adapt to remain relevant to the subsector. Continuous communication with the industry will bridge the gap between what is offered at institutions and what is needed by the sub-sector.

All the stakeholder groups indicated the importance of practical experience and the value it holds for both the organisation and the student. In some cases it is seen as equal to formal qualifications. The relevance of training, skills and certain personal characteristics is also noted – the sub-sector wants a well-rounded employee that knows how to behave, how to communicate, how to solve problems and how to work with the new technology. The need for higher level qualifications was stated and one should investigate the articulation options of careers in this sub-sector. There is however a place for different skill levels at tourism and travel businesses. In all the discussions with the different stakeholder groups the importance of training was realised.

One of the most important skills sets to be developed now is technology skills – all stakeholder groups indicated the importance of this. This should reflect in formal and informal training programmes. People skills and working with customers were also indicated by the participants but interesting there was also mention about the well-being of employees after COVID-19. Due to limited staff in the businesses, the current staff are working harder and handling more than pre COVID-19. Soft-skills is a burning issue also in this sub-sector and should be a focus point for CATHSSETA moving forward. There are always positive reactions towards up-skilling and most stakeholders support this, whether it is internal or external. One should however be careful in terms of the content so that it provides for career progression and not stagnation. Employers see up-skilling as a longterm investment, but they are also hesitant to promote training as the people leave the business once the training is complete.

Table 5.14: Understanding the workplace

EMPLOYER VOICE	EMPLOYEE VOICE	GOVERNMENT AND QUASI-GOVERNMENT VOICE	ACADEMIC VOICE
		Changes in the labour landscape	
		• Appropriate training • Loss of time and expertise • Unrealistic expectations when entering the sub-sector	
Types of occupations in the tourism and travel services sector	**Changes in occupations in the tourism and travel services sector**	**Changes in occupations in the tourism and travel services sector**	**Changes in occupations in the tourism and travel services sector**
• Management • Finances • Marketing • Administration	• Changed business operations • Business survival techniques • Marketing management • Being a life-long learner	• Optimisation of skills • New occupations will demand higher levels of creativity	• Technology changes occupations • Occupations remains the same but roles and responsibilities changed • A variety of occupations are available
Readiness of students/learners to enter the workplace		**Attractiveness of the workplace**	**Attractiveness of the workplace**
• Not ready to enter the workplace • Importance of practical experience		• Unattractive sub-sector • Available positions in rural areas	• Optimistic but sceptic
Challenges in the labour market		**Challenges in the labour market**	**Challenges in the labour market**
• Job delivery and expectations • Readiness of the business to employ		• Loss of expertise in the sub-sector • Unrealistic expectations of young people	• Balance between experience and theoretical knowledge • Seasonality

• Lack of experience • Finding the right person Employees are not serious about their work			• Career choice • Lack of skills in the sub-sector • Low salaries
		Changes in the labour profile	**Changes in labour profile**
		• Well-equipped students • Changing business environment to operating in.	• Confidence with technology • Personal characteristics • The 'brain drain'
Future of work in the tourism and travel sub-sector	**Future of work in the tourism and travel sub-sector**	• **Future of work in the tourism and travel sub-sector**	• **Future of work in the tourism and travel sub-sector**
• Optimistic about the future of the sector • Investment in staff	• **Positive outlook** • **Need to overcome challenges**	• Develop domestic tourism • Development of new attractions • Development of nature experiences	• Collaboration • A positive outlook related to growth • Utilising the trends in tourism can benefit the sub-sector
		Towards professionalisation	**Towards professionalisation**
		• Currently high level of professionalism if the position fits the employee	• Support for professionalisation

According to the government stakeholder groups (Table 5.14) the labour landscape has changed significantly. One of the biggest concerns is the exodus of people that has been working in the sub-sector for many years. This led to a gap in knowledge which might take years to rebuild. Added to this the recovery process is slow and it might take another year to get through this. One of the most significant comments made refer to the expectations of people entering the industry which is a mismatch with what they should do – the leads to conflict, people moving to other opportunities which weaken the sub-sector. Practical training can address this challenge. The discussions around occupations resulted more into the knowledge that is needed to work in the industry which can be linked to certain positions. There were clear indications of business management content to be included in training as well as teaching students how to survive and what to do when such a devastating event such as COVID-19 strikes. It could be deducted that occupations did not change but the role and functions linked to these positions did change. It is time to optimise the skills inhouse to deliver an improved product or experience to the customer. It is needed that this sub-sector unpacks the new roles and responsibilities since technology directly influence the changes. In this ever-changing sector employees will be life-long learners.

With the positive outlook of the sub-sector, it is disappointing to see that employers feel employees are not ready to enter the workplace and that this sub-sector is seen as an unattractive sector to work. The readiness issues can be solved through practical experience which is highly recommended for all training programmes. It was also noted that the young people are not interested to work in this sub-sector in rural areas – where there are positions available. They want to work where they have access to what they need. A strategy to move people back to rural areas and develop this is critical. Given what happened during COVID-19 there are high levels of scepticism related to tourism as a viable industry. One should create awareness and build the image of the sector by highlighting its contribution to the economy etc. A significant challenge to address is the attitude of employees working in the sub-sector not really being proud of what they do -this filter through to the customer which is unacceptable. This sector also needs to deal with seasonality. Another aspect that needs some further investigation is salaries and this sub-sector also pays low salaries which is one of the reasons why people leave the sector. In general (Table 5.15) the participants are positive about the future of this subsector but also cautions of the external factors that might hinder growth. It is already evident in the sector and it was stated here that the domestic market plays an important role in the recovery strategy and one should formulate long-term strategies to keep the domestic tourist market close.

Table 5.15: General aspects

EMPLOYER VOICE	EMPLOYEE VOICE	GOVERNMENT AND QUASI-GOVERNMENT VOICE	ACADEMIC VOICE
CATHSSETA			
• no to limited knowledge and participation			
Internships and Learnership programmes			
• Supportive of internships and learnerships			
Sector Involvement			
• *Participation in policy and strategy review* Active participation through local organisations upon request • ***Membership of organisations*** Membership on a national level Membership on a local level			
Other comments	**Other comments**	**Other comments**	**Other comments**
• Development of local tourism • Improved cooperation	• **Improve collaboration** • **Creation of events** • **Promotion of new careers**	• **New developments are needed in the sub-sector** • **Development of township tourism**	• **Rural development** • **Collaboration** • **Awareness of this sub-sector at school level**

For the participants that formed part of the interviews CATHSSETA as an organisation is unknown to them. Limited awareness leads to limited participation. Given the services delivered by CATHSSETA this sector should benefit from opportunities. The sector advocated for practical training and also indicated here that they support these initiatives – some investment should be made to make CATHSSETA a household name. The participants are participating but are willing to participate more where needed.

5.5 RECOMMENDATIONS RELATED TO THE RESULTS

The final recommendations integrate all the results according to the objectives. The integrated stakeholder view provides insights to major issues in the sub-sector but also insights to issues previously unknown. This is an opportunity to iron out challenges and create solutions.

- This sub-sector is not back to a new normal with events not happening as before and tour operators not functioning as before. They are dependent on the decisions made by the tourists and visitors. In these cases, one should emphasise the value of face-to-face meetings and conferences as well as in person tours – the experience should be promoted to potential tourists and clients. It might now be the right time to attract big events to SA as globally people want to be outdoors.
- The limited information or knowledge that the participants have about CATHSSETA should be addressed – this can be done by means of a roadshow.
- This sector should unpack their offering. For example, in the case of events it is important to determine the value, preference and sustainability of hybrid events. What does this the client want in this new world?
- Training is needed for the subsector specifically related to training in technology as this is required by both the consumer and the supplier.
- The importance of practical experience is also noted here. CATHSSETA can consider setting up a work-integrated-office from which students are placed according to the specifications of their degrees. This will be a game changer for both the sector and the employers.
- In this sub-sector it is also important to be well-rounded in terms of knowledge, experience and personal characteristics. With personal characteristics being important, potential employees must carefully consider whether this is their career choice. The ideal is to train only those that are really interested, as this is not a nice-to-have type of situation.

SECTION 6: THE CONSERVATION SUB-SECTOR REPORT

6.1 LITERATURE OVERVIEW FOF THE CONSERVATION SUB-SECTOR

6.1.1 Aspects related to the conservation sub-sector

South Africa is the third most biodiverse country in the world, with an amazing wealth of biodiversity and ecological infrastructure (DEA, 2018; Driver & Mukhadi, 2019). Biodiversity encompasses "businesses and other economic activities that either directly depend on biodiversity for their core business or that contribute to the conservation of biodiversity through their activities" (The Department of Environmental Affairs (DEA), 2015). A total land area of 224,640 km^2 is a marine and coastal protected area. The country has 53 forest nature reserves, 1,611 protected areas, 22 national parks, 39 marine protected areas, 5 natural world heritage sites, 23 Ramsar sites, 9 UNESCO MAB-Biosphere reserves, 6 Transfrontier parks/conservation areas, and 8,48 percent of the land is for terrestrial protected areas (African Leadership University School of Wildlife Conservation (ALUSWC), 2020). South Africa has seven percent of the world's reptiles, birds, and mammals, 10 percent of the world's plants, and 15 percent of the world's coastal marine species (DEA, 2018). Therefore, the country has 404 reptile species, 125 amphibian species, 336 mammal species, 732 bird species, 658 freshwater fish species, and 13,000 marine fish (ALUSWC, 2020). The country's biodiversity is exceptional as it is characterized by a wide variety of ecosystem types, high species richness as well as high levels of endemism. Biodiversity in South Africa also benefits the economy, society, and human well-being, and such benefits depend on intact ecosystems, healthy species populations, and genetic diversity (The South African National Biodiversity Institute (SANBI), 2019).

6.1.2 International and national coverage

There are four different types of conservation: (i) environmental conservation, which refers to work related to maintaining natural resources through sustainable methods such as replanting trees, energy conservation, and educating others on the importance of environmental care and raising awareness about climate change; (ii) animal conservation which entails protecting endangered species in the wild. It mostly involves safeguarding animals, their environments, and natural habitats. Usually, it involves observing and identifying as well as keeping animals in controlled environments until they are ready to be rehabilitated; (iii) marine conservation which involves the preservation of oceans, including the different species and ecosystems within them; and (iv) human conservation which involves safeguarding local communities from the influence of western culture so as to protect indigenous people's culture (Oyster Worldwide Limited, 2022).

6.1.3 Emerging trends, occupational patterns, and skills required to support the conservation sub-sector

Driver and Mukhadi (2019) posit that biodiversity-related jobs can be grouped into two broad categories (i.e., those that contribute to conserving biodiversity and those that utilize biodiversity) and five sub-categories, as shown in Figure 6.1. A1 jobs are directly involved with conserving biodiversity assets (both ecosystems and species) and entail management of protected areas and conservation areas as well as efforts to conserve particular species. Efforts to mainstream biodiversity in planning and decision-making in biodiversity-priority areas outside protected areas are also included (Driver & Mukhadi, 2019). A2 jobs aim to restore ecosystems' function to improve their ability to generate and deliver valuable services to people. Examples include removing invasive alien plants to improve water supply and agricultural productivity, as well as restoring wetlands to improve water quality and prevent flooding. Natural resource management activities that contribute to maintaining healthy ecosystems are also included in this sub-section (Driver & Mukhadi, 2019).

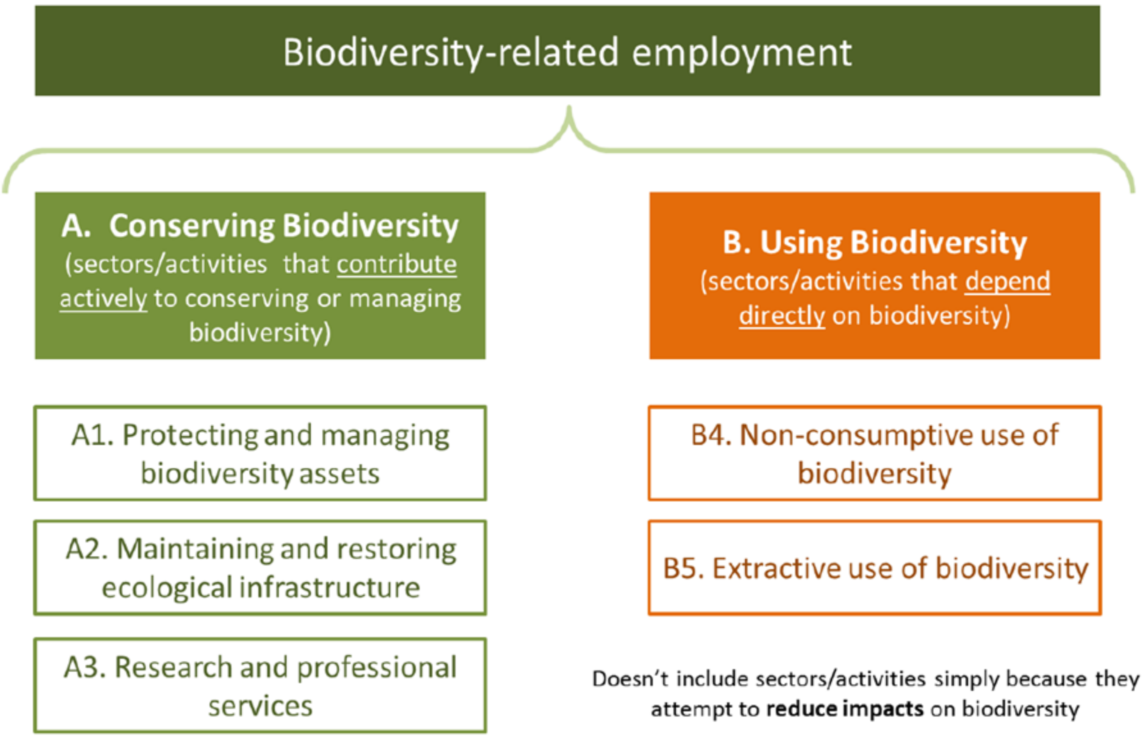


Figure 6.1: Biodiversity-related employment

Source: Driver & Mukhadi (2019, p. 10)

A3 jobs contribute to the knowledge of biodiversity, forming the foundation for effective biodiversity management and innovation in biodiversity management and sustainable use. This is done at universities, other research institutions, biodiversity consulting services, and biodiversity information management (Driver & Mukhadi, 2019). B4 jobs depend on the enjoyment of biodiversity and not the extraction or consumption of biodiversity assets. Examples include nature-based tourism, some adventure sports, and the production of media and art related to biodiversity. Such activities occur inside or outside protected areas (Driver & Mukhadi, 2019).

B5 jobs depend on the direct extraction or consumption of biodiversity in the form of indigenous species or ecosystems, either for profit or subsistence. Examples are game ranching and hunting (Driver & Mukhadi, 2019). To ascertain the number of people undertaking biodiversity-related jobs in all five sub-categories in South Africa, Driver and Mukhadi (2019) used data collected by three different methods (administrative data, existing sector estimates, and survey data from the Quarterly Labour Force Survey) and each method had different results. Therefore, they recommended a national indicator of biodiversity-related employment which will be able to give one figure of the actual number of people involved in biodiversity-related employment. Nevertheless, ALUSWC's (2020) research revealed that recreational fishing directly supports 94,000 employment opportunities, while ecotourism creates 88,000 jobs. Hunting which provides employment for both skilled and unskilled people, especially in rural areas where there are few other employment opportunities, directly creates 65,000 jobs. SANBI (2019) states that although more than 418 000 jobs in South Africa are believed to be directly related to biodiversity, this figure is most likely an underestimate as every job dedicated to conserving biodiversity (e.g. in protected areas) has at least five other jobs that depend directly on biodiversity use. Most of the jobs are in various sectors that include fisheries, wildlife ranching, biodiversity-based tourism, traditional medicine, and indigenous tea production (SANBI, 2019). Figure 6.2 shows the number of biodiversity-related jobs in South Africa in 2019.

Figure 6.2. Number of biodiversity-related jobs in South Africa

Source: SANBI, 2019, p. 3

UNISA (2018) defines skills as abilities one has developed and can use effectively. Green Matter (2012) argues that it is difficult to pinpoint and quantify skills needed for the biodiversity sector due to a number of reasons: (a) organisations use a variety of titles for the same occupations; (b) the use of vacancy data to determine scarce skills is complicated due to the fact that some vacancies remain unfilled because of budgetary constraints, not necessarily because the skills are not available in the country; (c) in other cases there may be skills needs that are not reflected as vacancies because organisations have not (yet) created the necessary positions; and (d) conducting demand side or skills needs surveys involves a complex, expensive methodology.

Green Matter (2012) gives a distinction between absolutely scarce skills (where South Africa does not have enough people who can perform these tasks), and relatively scarce skills (where there may have competent and qualified people, but positions still remain unfilled). Usually, absolute scarcity occurs when there is a new or emerging occupation in which there are not enough skilled people or there are no people in the pipeline to replace those who leave. On the contrary, relative scarcity occurs when qualified people in the market exist but are not prepared to work in particular jobs, or locations; when there are insufficient numbers of black South Africans to meet equity targets; and when students are in the pipeline but are not yet experienced enough to fill vacant positions. However, DEA (2018) compiled a list of skills required by each of the three sub-sectors of the sector (Figure 6.3).

Although the DEA (2018) did not indicate which of the above are scarce skills, Green Matter (2012) identified the following as scarce skills in biodiversity:

- Curators of biodiversity collections
- Ecologists, especially in marine but also aquatic and terrestrial systems.
- Engineers (civil) with biodiversity specialism.
- GIS specialists and GIS technicians
- Lawyers with an environmental specialism.
- Monitoring specialists, species protection officers, and inspectors.

Figure 6.3: Skills required to support the sector

Source: DEA, 2018

- Policy developers and analysts; urban and regional planners with biodiversity insight.
- Resource economists with a biodiversity-related specialism
- Social scientists specialising in the environment; Intellectual property & indigenous biodiversity knowledge specialists.

- Soil scientists.
- Statistical ecologists & modelers
- Taxonomists, systematists for marine and terrestrial systems
- Biodiversity monitors in marine and other ecosystems
- Protected area managers
- Social ecologists
- Wildlife veterinarians.

Martin (2021) states that working in African wildlife conservation requires specific skills, experience, and personal characteristics. Therefore, Oyster Worldwide Limited (2022) provided a list of four other skills that they deem critical for one to land a job in conservation.
These include:

- *Identification skills* to identify different plant and animal species. This can be helpful in species-focused surveys or different types of community conservation work. Employers of field-based workers are always on the lookout for people with extensive knowledge, as being able to identify subjects quickly and accurately as this prevents unnecessary project delays. Of late, there have been various apps that can be used on the go, which can help with complex identification.
- *Communication skills* for presenting research, fieldwork, surveys, and observations findings to others. The responsibility of educating the local community, raising awareness, and liaising with schools comes with many roles in this sector. This means one needs to be able to listen and collaborate with others. Learning local languages, laws, and customs is also vital.
- *Mapping skills* are important as fieldwork often requires finding and recording many different locations, and knowing how to get around with a compass and map is a prerequisite. Nevertheless, with advancing technology, there are many great apps that can be used on mobile devices in the field.
- *Research skills* are vital for selecting appropriate survey methods relevant to the area of study, but also to be meticulous with data collection and logging and have good critical thinking. The best researchers pay excellent attention to detail, are great communicators, know how to implement analysis, and are able to maintain quality and safety standards.

Nevertheless, CATHSSETA (2019) identified some emerging occupations within the conservation sector, and these include Conservation Chief Information Officers; Brownfield Redevelopers; Ecological Rehabilitation Professionals; Social Media Specialists; Business Development Specialists; Technologists; Environmental Scientists; Bio Technicians; Wildlife Ranchers; Animal Attendants;

Biodiversity Planners; Conservation Scientists; Climate Awareness Educators; Environmental Disaster Responders; Green Marketers; Fish and Game Warden, Recycling Coordinator, Compliance Manager, Green Marketer, Environmental Science and Protection Technicians. Similarly, DHET & CATHSSETA (2021) also identified Biotechnician, Sustainability Manager, Environmental Economist and Biodiversity Stewardship, Wildlife Trade Economist, and Wildlife Rancher as some other emerging occupations within the sector.

Besides the emerging occupations, the conservation sector does have some hard-to-fill vacancies (HTFVs). These are defined as “occupations that take longer than a year to find suitably experienced and qualified candidates to fill” (CATHSSETA, 2019, p. 37). Such HTFVs include Park Ranger, Conservation Scientist, Zoologist, Health and Safety Officer, Biodiversity Information Management, Research and Development Manager, Adventure Safari Guide, Environmental Scientist, Marine Biologists, and Environmental Manager. Most of the reasons cited for these positions to become hard to fill are that there is a lack of suitably qualified people as well as minimum requirements (i.e. a degree and relevant work experience). Employers also require those with skills at the junior to middle management level, making it difficult for fresh graduates to take up such positions (CATHSSETA, 2019; DEET & CATHSSETA, 2021).

The Department of Higher Education and Training (DHET) (2016) recommends a dialogue between education providers and the industry to align and optimise the demand and supply of skills as skills development is brought about by education and training. The Department also bemoaned the scarce information on the number of existing jobs, newly created jobs, and of unfilled vacancies in specific sectors, which all undermine efforts to systematically assess and develop the skills base not only for South Africa but for the whole continent. This is due to the scarcity of research to provide such information. This, therefore, calls for initiatives aimed directly at improving data collection. As a strategy to ‘level the playing field’ within the tourism industry, Kaplan (2004) advocates for the state funds skills development for the poor since “the poor do not have the resources to pay their own training” (Bennell, 1999, p. 55).

6.1.4 Key role players

The conservation sector in South Africa is built on two pillars. Pillar one is state-owned land such as National parks, Provincial parks, and municipal-owned reserves. The second pillar consists of the private wildlife industry, also called game farms or private game reserves. State-owned conservation areas consist of National parks (19), Provincial parks (117), which are as follows, 21 protected areas in

Western Cape, 7 in Limpopo, 13 in Mpumalanga, 16 in North West, 34 in KZN, 6 in Eastern Cape, 3 in Free State, 9 in Gauteng 9 and 8 Northern Cape provinces. Totalling a 136-state owned protected areas. The total land just managed by SANParks is more than 4 million hectares (Van der Merwe & Saayman, 2005).

In 2000, the private wildlife industry or game farms comprise approximately 7000 privately-owned game farms in South Africa, with a total surface area of 16 million ha (Ebedes 2002), of which 5061 were exempted game farms, with a surface area of 10 364 154 ha (Erasmus 2000). Research conducted in 1993 indicated that the surface area of exempted game farms constituted 8.5 % of the total agricultural land in South Africa, which increased to 12.5% in 2000, with a total of 1.7 m head of game (Eloff 2002; Erasmus 2000). South Africa's private wildlife sector comprises three sub-sectors (Figure 6.4).

Figure 6.4: Private wildlife sector three sub-sectors

Source: DEA, 2018

The South African private wildlife economy has a unique value chain as well (Figure 6.6).

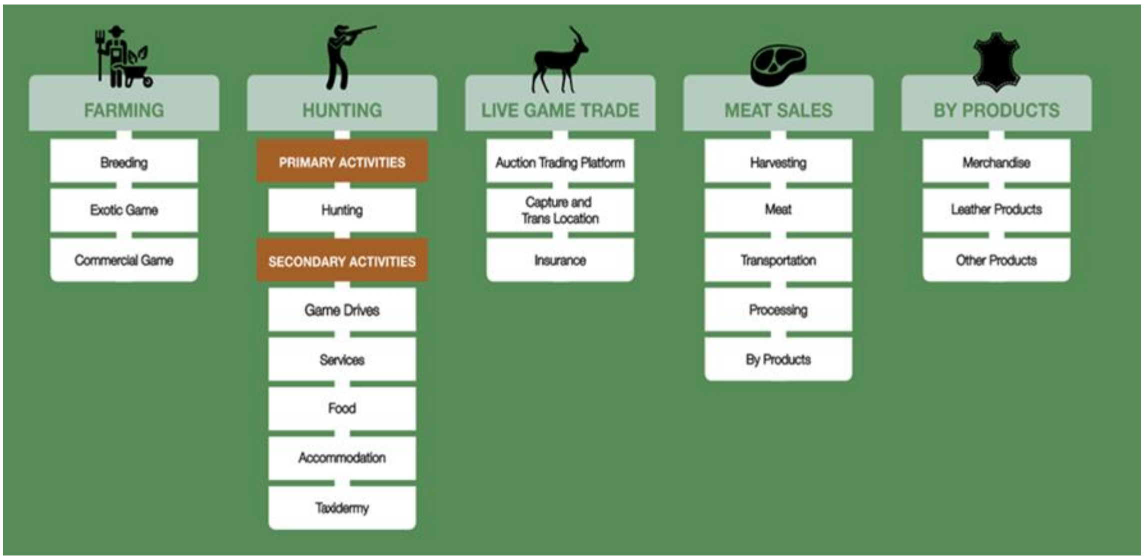


Figure 6.6: Private wildlife economy value chain

Source: Department of Forestry, Fisheries and the Environment website

The value chain is centered on game and wildlife farming or ranching activities that relate to the stocking, trading, breeding, and hunting of the game, and all the services and goods required to support this value chain (ALUSWC, 2020; Department of Forestry, Fisheries and the Environment, 2022). The key drivers of the value chain include domestic and international hunters, domestic and international photographic tourists, and growing retail market demand for wildlife products such as game meat and taxidermy products (ALUSWC, 2020). As shown by Figure 2, the sector is characterized by a combination of agriculture, ecotourism, and conservation characteristics, which results in numerous layers of complexity in terms of the management of, and legislation related to the sector.

Various institutions are responsible for managing the wildlife economy in South Africa. DEA (2016) states, "The wildlife economy is regulated by the public sector and operationalised by the private sector, with support from academic and research organisations". Therefore, more than 400 private organisations focus on conservation, wildlife, and the general environment, while more than 30 botanical and horticultural organisations concentrate on conserving the country's flora (South Africa, 2020). Research organisations also play an important role in the wildlife economy of the country. Examples include the Institute of Commercial Forestry Research, the Forestry and Agriculture Biotechnology Institute, the Council for Scientific and Industrial Research (CSIR), and the South African National Biodiversity Institute (SANBI). The government sectors provide oversight and include national and provincial departments as well as conservation agencies. Academic institutions, NGOs, research councils, and local governments are supporting sectors providing implementation support. Investors and the private sector, including banks, entrepreneurs, and private-public partnerships (PPPs), among others, are responsible for operationalization and economic development, while communities are involved in the implementation and economic development (DEA, 2016).

The South African state-owned wildlife sector consists of similar subsectors as the private but mostly excludes hunting and game meat sales. The subsectors of the state-owned wildlife industry are ecotourism/wildlife tourism, breeding, and conservation. State-owned wildlife two sectors (Figure 6.7)

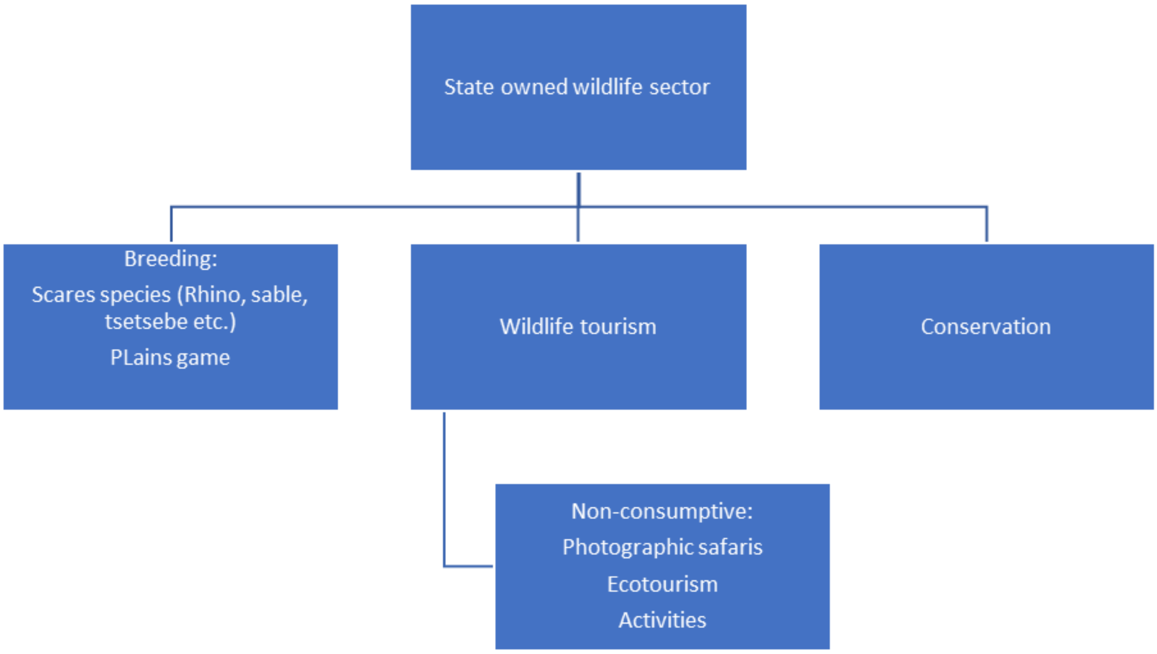


Figure 6.7: State-owned wildlife two sectors

The state-owned wildlife sector value chain is portrayed in Figure 6.7. The value chain of the state-owned wildlife sector consists of three areas, Conservation, Non-consumptive wildlife tourism, and breeding of wildlife. The key drivers of the value chain are domestic and international photographic tourists and the breeding of game. National parks host a variety of species, therefore, are well situated to sell wildlife to the private sector, as they have a fast amount of endangered and other species that are sought after by the private sector (ALUSWC, 2020). Figure 6.8 below shows the value chain of the state-owned wildlife sector.

Figure 6.8: Value chain for state-owned wildlife sector

However, the DEHT and CATHSSETA (2021) contend that the conservation sector's main key role players are: (i) National, Provincial, and Local government; (ii) Non-Governmental Organisations (NGOs); Private Reserves; and (iv) Business and Industry.

6.1.5 Economic performance

CATHSSETA (2015) and the DHET and CATHSSETA (2021) argue that it is not easy to determine the economic contribution of the conservation sector due to a lack of official statistics and the fact that where these statistics do exist, there is no differentiation between the environmental sector and its conservation sector. The DHET and CATHSSETA (2021) attribute this lack of accurate official statistics to the emergence of the green economy. South Africa does not report green jobs individually in any of its official surveys and statistics.

The wildlife economy in South Africa drives rural development and prosperity. This is due to the sustainable use of wildlife assets, the socio-economic benefits of ecotourism, co-managed conservation areas, and related ancillary services to protected areas. These include the processing of resources into secondary products that are consumed and traded domestically and internationally (DEA, 2018). The SANParks annual report of 2017/2018 states that ZAR 1.6 billion (approximately USD 120 million) was generated by seven million visitors, whereas ZAR 579 million (approximately USD 43,5 million) was generated from conservation fees and SANParks operated activities brought in ZAR 101 million (approximately USD 7.6 million). Accommodation comprising SANParks operated overnight facilities generated ZAR 718 million (approximately USD 54 million), and concession fees from private sector-operated lodges racked in ZAR 83 million (approximately USD 6.2 million). Other tourism income (i.e., cancellations, conferencing, and laundromat) generated ZAR 41 million (approximately USD 3.1 million). Game reserves make up the bulk of South Africa's tourism industry and indirectly employ 1.5 million people while contributing 7 percent of the GDP (CATHSSETA, 2019). There were notable decreases in revenues generated from these activities between 2020 and 2021 due to the COVID-19 pandemic. Thus, R618,748,000 was generated from 1,996,667 visitors, and R145,7 million was generated from conservation fees while from operated activities was R24,7 million. Accommodation, including camping, racked in R366,8 million, while retail activities generated R20,2 million, and revenue from concession operators was R17,8 million. Retail and food and beverages generated R21 million, while revenue collected from sundry sources and cancellation fees was R22,8 million respectively (SANParks, 2021).

Between 2005 and 2014, the value of South Africa's CITES exports was estimated at USD 1.1 billion. Similarly, SANParks got USD 1.3 million from selling flora and fauna (DEA, 2018). However, between 2020 and 202, R4,753 million was generated from the sales of flora and fauna (SANParks, 2021). This was also due to the effects of the COVID-19 pandemic. In 2019, hunting, which is the largest revenue contributor to the wildlife industry, generated USD 875 million (85%) from local hunters, while international hunters contributed USD 158 million (15%) to the economy. Game meat sales generated USD 56 million annually (Button et al., 2022). Wildlife products which include jewellery and curios (made from bones), wallets, handbags and shoes (made from skin), lampstands (made from horn), animal hides, and game meat, as well as wildlife filming and photography, recreational fishing, ecotourism, and wildlife ranching also contribute significantly to the economy of the country (DEA, 2018; ALUSWC, 2020). Taxidermy and tannery services contribute R580 million annually (Department of Forestry, Fisheries and the Environment, 2022). All this shows how crucial the conservation sub-sector is to the economy of South Africa. SANParks also has a wildlife economy project which involves communities in the wildlife economy through game farming, breeding, and eco-tourism (SANParks, 2019). Consequently, the Department of Forestry, Fisheries and the Environment (2022) observed that 30 percent of wildlife businesses are owned by previously disadvantaged individuals. Foreign investment is also attracted by wildlife in Africa as a whole as donors such as multilateral institutions and bilateral funding agencies to private foundations, philanthropists, zoos, and NGOs pour a lot of money into the sector (Nature, Ecology & Evolution, 2020; CATHSSETA, 2019).

Besides the revenues generated by the sector, other benefits of biodiversity include economic growth and development by providing a basis for the fishing industry, rangelands that support commercial and subsistence farming, horticultural and agricultural industries based on indigenous species, the tourism industry, locations for the film industry as well as commercial and non-commercial medicinal applications of indigenous resources (CATHSSETA, 2018; SANBI, 2019). In many rural economies, income is generated through activities such as selling reed mats, baskets, and medicinal plants, signifying the importance of biodiversity in the country. The fact that many biodiversity-related jobs are outside the urban centres and are labor-intensive makes this sector contribute immensely to rural development, poverty alleviation, inclusive growth, and labour absorption (SANBI, 2019). (2010) and CATHSSETA (2018) argue that although seldom considered, the contribution of the natural environment (i.e., ecological wage) holds substantial value. Therefore, studies on resource economics carried out in South Africa estimate the total value of ecosystem services at R73 billion per year (SANBI, 2010; CATHSSETA, 2018).

6.1.6 The outlook for the conservation sub-sector

South Africa is in the fortunate position of having a vast wealth of biodiversity assets and ecosystems, and much of it is still relatively intact (Driver et al. 2012). The National Biodiversity Assessment (NBA) of 2011 confirmed that although South Africa takes up two percent of the planet's land resource, it is home to six percent of the world's plant and mammal species, eight percent of bird species, and five percent of reptile species. South Africa also has a large range of habitats, ecosystems, and landscapes as it is made up of nine terrestrial biomes, 30 freshwater eco-regions, and six marine eco-regions. In addition, the country is home to three globally recognized biodiversity hotspots.

The main findings of the NBA of 2011 are that wetlands are the most threatened of all the ecosystems in the country, and particular management and conservation efforts must be directed toward them. The NBA also found that the rate of loss of natural habitat is higher than others in some parts of the country, and if this trend continues, there will be no natural habitat left outside protected areas by 2050 in some provinces. The drivers of biodiversity loss and ecosystem health are essentially macro-type activities involving people, are usually of a socio-economic nature, and are therefore complex (CBD 2010; WWF 2012). They include loss of natural habitat, for example, as a result of cultivation, mining, timber plantations, urban sprawl, and coastal ribbon developments; invasive alien species; over-abstraction of water and alteration of flow in the freshwater environment; overharvesting, especially in the marine environment; pollution; climate change and so forth. These drivers influence the quality of ecosystems, affect their functionality, and alter the rate at which ecosystems deliver goods and services. It has also been found that an important contributing factor to the loss of biodiversity and ecosystems is the difficulty in putting a price on the ecosystem services, which means that their value is not properly and fully taken into account in market transactions and that they are often under-valued or ignored in development planning and decision-making processes (Driver et al. 2012).

According to CATHSSETA (2019; 2015) and the DHET and CATHSSETTA (2021), the conservation sector includes hunting and trapping, activities of conservation bodies, game parks, reserves, wildlife parks, zoological establishments, and botanical gardens, as well as wildlife conservation. Nevertheless, SANBI (2019) asserts that almost half of the 1 021 ecosystem types are threatened, where estuaries and inland wetlands have the highest proportion of threatened ecosystem types. Similarly, over two-thirds of the ecosystem types in South Africa are represented in the current protected area network. This leaves 31 percent in the not protected category, and the wetland and river ecosystem types have the lowest levels of protection (SANBI, 2019). In terms of species, 14 percent of 20 401 plants are considered threatened. This includes all mammals, birds, reptiles, amphibians, freshwater fishes, and invertebrates. Of the assessed 2 911 animals, a total of 12 percent is regarded as threatened (SANBI, 2019). Sixty-three percent of the plants and 63 percent of mammals, reptiles, birds, amphibians, freshwater fishes, and butterflies are categorised as well protected (SANBI, 2019).

6.1.7 Employer profile

As reported by the DHET and CATHSSETA (2021), the conservation sector is dominated by small entities. In 2021, those small entities that employ 0-49 people were 1 221, the medium ones (50-149) were 33, and large entities (150+) were 19. However, these figures were slightly higher for the small and medium entities before the COVID-19 pandemic (i.e., Small (1 809), Medium (37, Large (8)) (CATHSSETA, 2019). In terms of the geographical layout, CATHSSETA (2015) observed that the majority of the entities in the sector were in rural areas, where 61 percent of the entities were located in rural areas and 39 percent in urban areas.

6.1.8 Labour market profile

The labour market profile outlines the number of people employed in the sector, their demographics as well as their geographic location (CATHSSETA, 2019). In 2018, the sector employed more men than women. This is attributed to the nature of the jobs (i.e. hunting, trapping, park rangers). In the same year, 11 835 Africans were employed, 1 221 Coloureds, 118 Indians, and 1 3003 Whites (CATHSSETA, 2018). Although the sector recorded the highest increase of all the tourism sub-sectors between 2014 to 2015, there were notable decreases during the Covid pandemic (DHET & CATHSSETA, 2021). The increase in the number of employees between 2014 to 2015 is attributed to the increase in 'green jobs,' particularly in natural resource management (CATHSSETA, 2015).

Like the other subsector of the tourism industry, it should be noted that the conservation sub-sector is highly vulnerable to seasonality, consequently having significant levels of job instability. Besides these, the sub-sector is also notorious for low pay, long working hours, and lack of clear career paths. The majority of the employees are also youth, making the jobs perceived as transition jobs (CATHSSETA, 2018). The majority of the employees (40%) are employed in KwaZulu-Natal, 38 percent in Gauteng, and 7 percent in Mpumalanga (CATHSSETA, 2015).

6.1.9 Factors affecting skills demand and supply

Various factors have affected the skills demand and supply of the conservation sector (CATHSSETA, 2019, DHET & CATHSSETA, 2021). These include:

(i) *The Covid-19 pandemic* – As the sub-sector entirely relies on tourism and donor funding, disruption in the travel and tourism sub-sector impacted economic performance, wildlife conservation, and trophy hunting. As the sector is more prevalent in rural areas, their livelihood was greatly affected by the pandemic.
(ii) *Technology and digital divide* – As other jobs (curators and conservation biologists) within the sector require innovative solutions for information management, there is a growing demand for cross-cutting transdisciplinary skills. Thus, there is a need for tailored professional development programmes and ICT strategies to support traditional higher education curricula. The ability to use technology employees will improve the quality of the service in the sector.
(iii) *The gig economy* – This refers to "the labour market characterised by freelance, flexible, on-demand work rather than the more traditional nine-to-five working model" (CATHSSETA, 2019, p. 28). It is made up of three main components: the independent workers paid by the gig (a task or a project) as opposed to those workers who receive a salary or hourly wage; the consumers who need a specific service; and the companies that connect the worker to the consumer in a direct manner, including app-based technology platforms. Such companies make it easier for workers to find a quick, temporary job (i.e., a gig). The gig is driven by new technologies that enable transactions directly between providers and consumers, and the difficulty of finding traditional, stable jobs 9CATHSSETA, 2019).
(iv) *Green economy* – This has contributed to substantial job creation opportunities in programmes contributing to biodiversity conservation. Thus, the sector can contribute to the Green Economy by focusing on environmental science training interventions to produce Environmental Scientists, Plant

Engineers, Sustainability Managers, Industrial Efficiency Managers, and Environmental Sustainability/Energy Consultants (CATHSSETA, 2019).

(v) Globalisation – This has given the rise in demand for skills such as customer service, and in order to provide better service to international visitors, skills that need some improvements include: the ability to speak good English, cultural awareness, intercultural skills, language skills and local knowledge (DHET & CATHSSETA, 2021).

6.2 THE QUALITATIVE RESEARCH RESULTS

6.2.1 The conservation sub-sector: An employer perspective

6.2.1.1 Overview of the business

The participants were drawn from a variety of conservation organisations as can be seen in Table 6.1.

Table 6.1: Type of business and core responsibilities

TYPE OF BUSINESS	CODE	RESPONSIBILITIES
Nature conservation organisation	CE1	Environmental management and conservation assistance to a variety of stakeholders
Private nature reserve	CE2	Managing the ecotourism value chain
Conservation foundation associated with an ecotourism product	CE3	Operating the reserve with reference to conservation practises.
Tourism business linked to a non-profit organisation	CE4	Operates in the conservation sphere (locally and in the broader region)
Game farm	CE5	Managing ecotourism activities and selling of game
Private game reserve	CE6	Provide ecotourism activities to the international market
Tourism product	CE7	Focusing on conservation and education activities
Fundraising for wildlife tourism	CE8	Sustainability and conservation manager
Game farm	CE9	Ecotourism and conservation related activities (for 12 years)
Game farm	CE10	Ecotourism and conservation related activities
Safari company	CE11	Travelling in natural areas (for 10 years)
Game reserve	CE12	Focus on marketing related activities of the game reserve (17 years)
Conservation Centre for endangered species	CE13	Taking care of endangered species, raising funds for conservation (5 years)
Game reserve	CE14	Ecotourism and conservation related activities
Eco-facility	CE16	Ecotourism related activities
Safari company	CE17	Travelling in natural areas with the South African market (14 years). He is also the Chief Executive Officer of a major wildlife association
Hunting and breeding of game	CE18	Activities related to hunting and breeding (15 years)

These stakeholders are in management positions that take care of the management and conservation of nature as well as community development efforts and ecotourism. Other responsibilities included wildlife management, research and veterinary services and since the participants are in management, it also involves typical tasks such as human resource and financial management. More recently, anti-poaching has also been added as a task. It is evident from the responses that skills related to the management of a business is important. Some of the skills that are more relevant include project management, business management, conflict resolution and other related soft skills. The participants have been working in this industry between 3 and 26 years and therefore they have experience and knowledge related to the topic investigated. It was clear from the discussions related to skills that one might need to be an "all-rounder" and be able to perform a variety of tasks in this environment.

a. Changes in the sector because of COVID-19

From the discussions, it was clear that some participants in the conservation sub-sector that some participants experienced positive changes and others negative changes because of the pandemic.

The first positive change indicated by participants was ***an elevated appreciation of nature*** due to COVID-19. It seems that people want to be outdoors and enjoy nature (CE3; CE5; CE17). CE3 stated that [CE3...*people are realising the importance of conservation areas*]. Lockdown also led to more people appreciating nature and the joy of being outdoors. CE5 indicated that COVID-19 changed peoples' attitudes to appreciate nature even more. For CE17, there was a re-awakening of the value of nature and South Africans appreciating their own country. However, with the increase in living costs, people are travelling less or spending less when travelling.

Secondly, **the importance of the South African market** as consumers of conservation efforts were realised by the participants (CE8; CE9; CE11). CE8 indicated that the market also changed, and turning to South Africans for business was necessary. CE9 explained that during COVID-19, there was a shift in their market as they focused on the international market but realised the value of local and African residents as clients – [CE9…*we got a lot of support, I do not think we could have made it through COVID, if we had not had the support of the domestic and the African market*]. CE11 indicated that one of the significant changes in their business was the move to the local market, more specifically, executive groups in the local market.

Thirdly, the **restructuring of businesses** and **new business models** were evident (CE1; CE3; CE8; CE9; CE10; CE11). Participant 1 (CE1) indicated that due to COVID-19, their business had to restructure, which was, in his opinion, good since [CE1…*COVID got us to focus*]. CE1 added that [CE1…*as a conservation consultancy and operations business, COVID-19 had a positive effect on us in the end*]. It was indicated that the organisation became more efficient and more effective. CE3 indicated that the organisation learned lessons due to COVID-19 that influence future business models. This organisation was dependent on tourism to fund specific activities which then halted. CE3 stated [CE3...*it certainly got us thinking about how we try and buffer against something like that happening again*]. It was also stated that the conservation activities continued during COVID-19, but the income stopped, which demanded higher levels of innovativeness. On a positive note [CE8... *we got very smart about working going forward*] which led to changes in how the business is managed. It was also important to distinguish between business essentials and business nice-to-haves; this added to the agility of the business moving forward. CE9 highlighted the move to local buying and strengthening of the supply chain as part of their new business model, through local products. CE9 stated [CE9… *we've got a new informal sector, community businesses that we are busy engaging with to try and integrate them into our supply chain*]. It was indicated by CE10 that during COVID-19, they had to streamline staff structures to run the operations more efficiently.

On a negative note, **financial challenges and constraints** were mentioned by participants (CE8; CE12; CE13; CE14; CE18; CE7). CE8 stated […*funding became a real challenge when your business is funded through overseas tourism*]. This business had to retrench 30% of its staff, and salary reductions were applied. CE12 stated that many businesses closed and went bankrupt. In the wildlife environment, owners took off a significant amount of game to survive, which resulted in a shortage of animals in 2021 and an increase in prices in 2022. CE14 focused on the lack of funding for conservation due to COVID-19, which influenced the cash-flow of businesses leading to businesses closing down. It was stated that [CE12… *hunting... contributes to the conservation efforts, without the hunting, there will be no conservation because very few reserves can be sustainable only by breeding or tourism*].

CE13 stated that the decrease in international tourists led to a significantly lower income for the conservation centre which affects their projects and activities – [CE13…*so you have to make your operation smaller*. *So instead of running 2-3 projects, you can now only afford to run one project*]. CE18 stated [CE18*… It's has forced us to refocus our business on aspects that produce better yields and also to look at diversifying the business into other income streams]*. CE7 stated that due to a lack of tourists, the business had to find more creative ways to continue with business such as sponsorships and fundraisers – this led to non-support for conservation programmes. CE1 also noted the absence of tourism creating an income for certain conservation areas. The pandemic thus led to different management practices It was also noted that due to the financial constraints, the sector lost its ability to educate people about the importance of conservation.

The main themes focused on an appreciation for nature, the importance of the local market for conservation, the restructuring of businesses and changes in business models, financial challenges and constraints (interaction between tourism and conservation).

b. Economic performance of the sector

The participants were requested to provide their opinion on the economic performance of the conservation sub-sector and indicate the factors influencing growth in this sector.

One of the most important aspects discussed by participants was the **effect of limited funding and dependence on external organisations and people** on the economic performance of the sector (CE3; CE1; CE4; CE7; CE13; CE16). The organisation where CE3 is situated are funded through an endowment fund and thus there was funding to continue with their activities – utilising their reserves. However, during COVID-19 the lack of income lead to conservation being an expenditure and not creating any income. Thus, during COVID-19 [CE3…*economic performance, essentially, was an expenditure, one only, there was very little revenue generation; …Conservation is a very, very expensive job*]. CE1 operates the business based on self-funded conservation projects where there was involvement from companies such as Eskom. With these organisations becoming more unstable it was decided to focus on the delivery of certain conservation services, namely fire protection services, which led to an increase in income from both national and international sources. It is recognised across the world how important conservation is but [CE4...*in terms of our government and funding for conservation in South Africa, every year, the amount of money available seems to be getting cut to our conservation agencies*]. One should realise that conservation is not just about conserving, it is about creating opportunities, livelihoods, water, looking after landscapes etc. In that regard the private sector is doing well. COVID-19 influenced the value chain – [CE7… *we had to take extra loans, …prices of certain products went up, ...places closed down, …production did not happen*]. CE13 indicated that there was no economic growth in the last few years and the centre was just stabilising. Conservation is the last cause that people support when there are for example people that do not have food. CE16 indicate that the economic performance is slow and also alluded to the fact that donations are needed to run the facility – which was difficult in the last few months. Although COVID-19 influence the economic performance it was stated that income is improving, and job creation can be significant. CE18 stated that the conservation sub-sector has a huge footprint in South Africa and there is good sustainable growth which also uplifts the surrounding areas.

Secondly the ***importance of tourism*** as a factor influencing the economic performance of the sector was highlighted (CE2; CE4; CE8; CE14). The fact that people could not support the conservation areas linked to ecotourism attractions left a huge gap in the economic performance of the sector. The growth and rebound of the sector are, however, slow (CE2). According to CE8 at soon as the borders opened business excelled [CE8...*I think that's been because foreigners have been desperate to travel*]. CE9 indicated that they cater to the higher end of the market, which is more resilient and less affected by economic stresses. It was also mentioned that people want to get into nature after the lockdown – it is as if they now know what is important in life. It seems that in many cases the tourism model is funding the conservation model and therefore CE9 caters to a small number of high-end customers, which creates income. During COVID-19 the growth was slow, and the recovery is slow, but he is positive because people are travelling again (CE14).

Thirdly, ***government processes and structures*** were indicated as a factor influencing the economic performance of the sector (CE4; CE10; CE11; CE12; CE17). It was stated by CE4 that even though money is provided by the government the pay-out process is not done on time leaving people without money. One of the biggest stumbling blocks for economic growth was mentioned as "red tape" – laws are good but there are too many conditions and permits for the industry to flourish. CE10 indicated that the growth was good over the last few years, but that government is over-regulating the industry. Given the pandemic, this tourism product should build a whole new clientele. CE11 indicated that one of the biggest restrictions in South Africa is the government in itself – he indicated that the government should partner with the private sector in moving it forward and listen to the sector with years of experience. CE12 stated that over-regulating inhibits growth in the wildlife environment. CE17 emphasised the importance of the private wildlife sector in economic performance.

The main themes focused **effect of limited funding and dependence on external organisations and people; the importance of tourism and government processes and structures.**

c. Challenges in growing the conservation sub-sector

The challenges indicated by the participants were very diverse which can also reflect personal and recent experiences working in the conservation sub-sector.

The first aspect that was mentioned relates to **finding competent future employees** (CE1; CE13). On a positive note, it was stated that the quality of students and conservationists entering the sector has improved – however, the number of students studying conservation and low entry levels to educational institutions were mentioned as challenges. Participant one stated that [CE1...*finding really competent, capable, young students that are wanting to learn is a challenge*]. It was stated by CE13 that some people working in conservation do not have the experience – this influences policy decisions. CE1 also stated that some people employed in the conservation sub-sector only work there because they could not find anything else which is problematic. Coupled to this some people in more rural areas are not aware of other careers that conservation and therefore they study it based on the information available to them – it might be that conservation is not their ultimate career choice.

The second challenge relates to **government processes and activities** (CE1; CE2; CE11; CE17; CE4; CE13). In terms of procurement, it was stated that [CE1… *I think procurement is atrocious*]. This is due to the running of tender systems, the administration and the time it takes to complete the tender. The role of government in expanding the conservation areas was also indicated as a challenge (CE2). CE11 highlighted the effect of over regulation of the government as a challenge – [CE11…*biggest industry killer is government over regulation*]. Poor legislation and a lack of understanding between conservation on public and private land was discussed. CE17 mentioned the permit system as an inhibiting factor. Participant CE17 indicated that to be a professional hunter one needs a permit which amounts to 18 permits if you want to do marketing throughout the country. Going forward political stability is a major concern as that influences the implementation of conservation activities. The significant growth of the population adds pressure to the need for water and space to grow residential areas. CE4 [… *not wanting to stop development and economic growth, but how do you safeguard nature...*]. CE13 indicated that creating space for conservation initiatives will become a challenge in the future. Added to space for conservation, CE2 mentioned the pressure to open a mine on their property.

Inability to address criminality related to conservation was seen as a major challenge (CE3; CE5; CE6) The cost of protecting Rhinos was mentioned by stating [CE3…*it takes up a quarter or more of your operational budget which is unsustainable*]. The lawlessness of the country and the inability of the government to get criminality under control is a major challenge. South Africa has very strong legislation related to conservation but there is limited follow-through to address illegal and other related activities. CE5 stated that safety is a challenge for South Africa. CE6 also referred to the challenge of addressing poaching.

The **lack of coordination between different stakeholders** was mentioned as a challenge (CE4; CE6; CE12). CE4 mentioned the lack of coordination amongst different stakeholders (working in silos) in conservation which leads to competition for funding for the same purpose. The private and public sector should support each other. CE6 indicated that unhappy communities, due to lack of involvement and coordination, make for unstable shareholders, which needs attention. CE12 indicated the wide variety of stakeholders in the conservation sub-sector, with fighting between roleplayers and the different rules and regulations applied by the provinces are challenging. It was realised during COVID-19 that the different sectors in tourism should be viewed differently when applying rules around strategies related to a lockdown – certain sectors could still operate safely, but then all were closed. Moving forward, international visitors' realisation of their carbon footprint will become more important and might influence travel decisions. SA needs to motivate that international visitors to SA contribute to the sustainability of nature and animals in this country.

Other external challenges mentioned:

Air access (available flights and routes to South Africa) (CE9), visas (CE9), load shedding (CE9; CE12); safety and security (CE9); corruption (CE12); poverty (CE14); job creation (CE14); limited conservation awareness (CE14; CE17); smaller tourist numbers to smaller provinces and the poor condition of national parks (CE6). CE17 indicated the ignorance of people not knowing what is happening in nature and how conservation works – [CE17… *for wildlife to grow outside of protected areas, it needs to have value,…if they stop people from utilising a natural resource thinking they are saving it they are actually doing the opposite*]. Education is needed – [CE17…*you cannot regulate and prohibit good management through legislation. You can only do it through education*].

The main themes focused on finding competent future employees, government processes and activities; inability to address criminality, lack of coordination between stakeholders and external challenges.

6.2.1.2 Labour-related information

a. Types of occupations/positions relevant to the conservation sub-sector

From the discussions with the participants, it was clear that this sector provides **opportunities for different skill levels** (CE1; CE2; CD9, CD10; CE11; CE13). It is important to work with well-trained and competent conservationists (CE1). CE2 does employ unskilled labour and therefore they do upskilling according to the needs of the business. It was evident that in more rural area there are limited skilled workers especially for the conservation sub-sector. CE13 indicated that since they are a non-profit organisation their budgets are limited and so they cannot afford skilled labour – [CE13…*so for us* *experience and willingness counts more marks than a diploma or a degree*].

It was clear that this sector provides **opportunities for a variety of occupations** (CE1; CE5; CE8; CD9; CE10; CE11). Further from the discussions it was clear that there are not necessarily new occupations but that the current occupations have changed, and some re-skilling is needed. In this sector it is important to have people that can handle conflict situations and lead a team (CE1). All occupations are important and have a role to play in the conservation sub-sector – from management to the person responsible for marketing, cleaning, human resources etc. CE5 emphasised the importance of good and professional guides and staff that can work in hospitality. CE8 highlighted the importance of Project managers as a critical part of conservation. CE9, CE10 and CE11 mentioned the basic occupations, for example housekeepers, gardeners and the maintenance crew that require a lower skill set whereas people working in food and beverage require a medium skill set and those in finance have a higher skill set. For game farms CE14 indicted the importance of an ecology manager and hospitality manager. CE16 stated the importance of employing someone at the ecofacility with knowledge of plants. For CE17 the front office manager/staff are the most important in the business as they first deal with the client.

The major themes highlighted the notion that the occupations remained the same, but a different skills set is needed, opportunities for different skill levels and a variety of occupations.

b. Types of qualifications relevant to new employees

It was clear from the responses that there is a place for different types of qualifications in the conservation sub-sector. The first theme that emerged relates to **higher level qualifications** (CE1; CE3; CE4; CE5; CE7; CE8; CE9; CE10; CE11; CE13; CE14; CE16).

In the line of the conservation sub-sector, the importance of holding an honours degree and higher was noted by CE1. It is relevant to be trained in project management since the new workplace requires employees to not only manage nature but also people, budgets, communities etc. CE3 stated that a qualification in conservation management, general management is important as well as administration. Depending on where one works it might also require qualifications related to infrastructure management and anti-poaching measures. CE4 stated that a diploma or degree in fields related to conservation, geology, botany and zoology is important. This was supported by CE7. CE8 stated that the Universities of Technology offer more practical qualifications, which are preferred for the conservation sub-sector. CE9 stated that for those involved in guiding and food and beverage it is important to have the right qualifications. CE10 indicated [CE10…*we will rather pay more and hire people with more experience and more qualifications*.]

CE11 indicated the importance of well-trained professional hunters (hunting industry) and the importance of having the right qualifications. He also indicated support to staff that wants to further their qualifications. In the case of the conservation centre it was indicted that it is better to work at the centre without a qualification and thereafter enrol for a qualification [CE13]. CE14 focused on the important of a diploma or a degree in the relevant field of conservation and hospitality. CE16 indicated that importance of a diploma or a degree for the conservation manager and also for the general manager. CE5 supported a conservation qualification with some experience in restaurants.

The second theme relates to **lower-level positions** (CE9; CE10)
For those in lower positions, it is more important to find someone that will fit the team – [CE9… *its more an attitude than a skill set, all the skill sets we can train once you're in the job*]. Previously CE10 employed people with no skill and trained them.

The third theme relates **no qualifications, experience and practical courses** (CE17; CE18; CE1; CE3). CE17 is a family business and thus do not see qualifications having an impact on the business. According to CE18 one does not need qualifications. Courses offered by WRSA are however attended by individuals. It was also mentioned that employees must register with the relevant organisations and associations in the sector (CE1). Besides qualifications, it was mentioned that experience attached to the qualifications is important – one needs to be able to implement what was learned. CE3 stated [CE3…*the work integrated learning aspect is vitally important*].

The major themes highlighted higher level qualifications; lower-level positions and no qualifications but experience and practical courses.

c. Skills needed to work in the conservation sub-sector (pre and post COVID-19)

The discussions revealed not only changes in skills but also changes in the way the business is managed. CE1 stated that more responsibilities were given to staff during COVID-19 which they handled with success – thus people working more independently. CE2 stated that everyone needed to have guts to get through the pandemic. It also seems that transparency improve during the pandemic with CE indicating that they shared the financial situation with employees, in their case the lack of funding from ESKOM, so that employees realise the severity of limited income. Post-COVID CE5 realised the importance of reviewing one's cost structure and the change in lead time to bookings which is much shorter than pre-COVID-19.

CE1 and CE14 stated that in conservation, one works with nature but more so with people. CE9 highlighted the importance of proficiency in English – this is a significant barrier when employing local community members as they cannot understand the guests. CE5 emphasised the importance of employing people from the community, which is done through in-house training but with external service providers. CE11 indicated that people working at the game farm started working there at a young age and they worked their way up – thus exposure to different areas of the game farm and access to higher positions.

Working in conservation, one needs to be able to resolve conflict and then move to educate people about the importance of conserving.

The following sentiments were highlighted related to changes in skills sets. CE9 stated that one of the most significant changes in skills set is related to technology – [CE9…*the way we interface with information technology has been the biggest change in our business in my view*]. CE13 indicated no significant changes but she highlighted the importance of multi-skilling – [CE13…*definitely a bigger variety of things that you can do, you can't just specialise in being the person that only do one thing, you have to do many things to be able to survive in an environment like this*].

Characteristics mentioned:

- Working with people (CE1; CE14)
- Dedication to the cause
- Reliable
- Honest
- Have a good work ethic
- Passion to work in the industry
- Self-awareness

Skills mentioned:

- Soft skills [CE1…*I could go on for a long time about this, because I think soft skills are more important than a degree or diploma in a specific subject matter*].
- Technical skills (conservation, security; administration, finance and human resources management)
- Leadership skills
- Self-management
- Time management
- Project management skills
- People skills
- Communication skills
- Hospitality
- Problem-solving skills
- Health related skills
- Knowledge related to the Geographic Information System (GIS) which focuses on capturing, storing, checking and displaying data related to selected locations
- Abstract thinking – the ability to make deductions from information
- Collaboration with different organisations
- Writing skills (Funding proposals)
- Language skills
- Marketing skills
- Research skills
- Conservation has moved into the Scientific Services more lately and there is a need for digital skills (CE8). Data is now captured automatically, stored in the cloud and forever available for analysis.

The most important skills that emerged include communication skills, problem-solving skills, people skills, technology skills and soft skills.

d. Readiness of employees entering the conservation sub-sector

Participants opinions related to students/learners readiness to work effectively in the sector were asked. It was indicated by CE10 that the turn-over of staff is high in the sector.

The first theme that emerge from this discussion related to **future employees not ready to enter the sector**. It was stated that the students are not ready to enter the industry – based on low entry requirements and educational institutions not focusing on developing theory related to the subject matter. CE4 stated that it is not expected for someone from an educational institution to have all the skills – some skills are trained while working. It was indicated that new entrants lack basic financial skills which relates to the notion that working in conservation requires sponsorships, fundraising and management of finances. Unfortunately, CE7 stated that the level is employees is worse than before by stating [CE7... *it started to deteriorate a bit…, …do the work different than the older generations*]. CE9 indicated that those finishing grade 12 are not ready for the industry. CE13 stated that the students/learners are not ready as they cannot do the physical work at the centre and the amount of work and the do not have work ethics. Her turn-around on learners are high. There are however success stories where students got permanent positions after working a year at the centre. CE16 felt that students are not ready due to the lack of practical experience – they take 21 students and provide practical experience over a period of three years.

The second theme relates to **getting future employees ready to enter the sector** CE3 stated that students are ready to enter if there was exposure to work-integrated learning – [CE3…*I think the combination of integrated learning and the theoretical is the only way to go*]. CE4 indicated the importance of understanding technology that can also improve students' readiness to enter the workplace. Most students enter with some form of qualification, but CE8 indicated that 50% of the work they need to learn on-site. CE11 mentioned the importance of practical experience before entering the industry and also state that those that do get practical experience tend to stay longer in the industry. It was stated that the organisations that offers specific training prepare students better with a specific skill set to enter the sector, for example field guide training.

The third theme relates to **being ready to enter the sector**

CE5 stated that the students are performing well and that they are learning every day in the business, specifically if people are prepared to share. CE2 stated that there are "gems" (strong potential employees) in the sector and doing some headhunting helps (CE2). CE9 indicated that at the University level the students are ready to enter the industry. CE14 stated [CE14…*theory is one thing, but your practical experience is very important…but the university set up a good baseline….then experience plays a big role afterwards*]. CE14 acknowledges the importance of both theory and practise.

The major themes related to **future employees not ready to enter the sector; getting future employees ready to enter the sector and being ready to enter the sector.**

e. Challenges in the current labour market

On the question related to the challenges that the sector experience in relation to the labour market the following themes were developed:

Firstly, **renumeration expectations** are considered a challenge (CE1, CE7, CE2, EE8, CD14).
CE1 mentioned the expectation of salaries based on the educational level of the employee. There is also a higher sense of entitlement in the current labour force – expecting more than what employees are willing to give. The increased cost of living was mentioned by CE2 as a major challenge and salaries cannot keep up with these increases. CE5 stated the challenge of unemployment but also alluded to the remuneration of staff, which should be fair, but that is not necessarily happening. Salaries are considered a challenge [CE7*… I would say that I think it is more like a salary thing that would prevent us from getting the right person*]. CE8 indicated that [CE8… *my challenge in the labour market at the moment is to afford the skills that are needed and retain the skills of training*]. CE14 mentioned unions as a challenge in the labour market. It was stated that the challenges are the same as pre-COVID-19 where labour costs are high and sometimes unaffordable.

Secondly, **finding the right employees** was indicated by the participants (CE4, CE6, CE3, CE9, CE10, CE13). It was also emphasised that some new employees just want a job, but in the conservation sub-sector, you need to have a passion for what you are doing. High levels of unemployment are a challenge, but it also goes hand-in-hand with the inability of the students to sell themselves (CE4). There is a gap in the higher-level skills related to management where there is a lack of people and a high turnover of staff (CE6). CE3 emphasised the importance of technology in the workplace and the ability of employees to analyse data. CE9 stated that even though tourism offers a low barrier to entry (no qualifications needed), it also restricts staff in their ability to grow further than a certain point in the sector – at some point, the qualification becomes more important. CE10 indicated that it is a challenge to find someone with experience. CE13 stated that people want their pay at the end of the month, but they want to sit in an office and get paid – the work ethic of the older generation is much better than the young people – [CE13…*and they do not like to start at the bottom. They want to start at the peak…that's the problem*]. CE18 indicated that finding honest, reliable workers is hard.

The major themes addressed renumeration expectations and finding the right employees.

f. Upskilling of the labour market

From the discussions there were significant **support for continuous upskilling of the labour market** and a significant amount of the budget is spend on upskilling (CE2; CE3; CE4; CE5; CE7). CE6 stated that [CE6… *it's something that we focus on all the time*]. Firstly, the relevance of **internal and external training** was noted. This happens in a variety of formats, including in-house training and online training. CE5 and CE9 supported upskilling and indicated that there are a variety of internal courses available as well as access to external courses. No certificates are, however, issued for the internal-training programmes (CE6). CE8 sends staff on certified programmes for which the company is paying. CE14 support in-house training if an employee shows potential, further development opportunities will be explored – [CE14…*good development is of great importance*]. CE17 does upskilling on a small scale, and it is more labour related training. It was indicated that it is very important and for that they have annual training days. It was also mentioned that upskilling should be done in rural areas where people cannot easily access training courses.

Secondly, **creating career opportunities in-house** was also noted. CE3 indicated that they created a career ladder in the organisation providing opportunities for staff to attend supervisory training – [CE3…*so they do not always stay on the junior level, they have the option to move up into management*]. Upskilling is critical for CE13 who stated that new employees start at the bottom, and they get more responsibility as they show that they can and want to do the work.CE4 stated […*support those people (internal) and help them to grow your business*]. CE4 offers training to the community related to horticulture, conservation, life skills, hospitality, biodiversity stewardship. CE11 stated that he was skilled by a professional hunter, which led to him now owning his own business. Thus, internal empowerment is also considered important.

The major themes that emerged included the importance of continuous upskilling, the use of external and internal upskilling programmes and creating in-house career opportunities.

g. Support of internship programme or learnership programmes

On the question whether participants employ people in learnerships, or internships two major themes evolved namely supportive of Internships and Learnership and those unsupportive of internships and learnerships.

Firstly, those **supportive of internships and learnerships** discussed the following aspects (CE2; CE3; CE4; CE8; CE9; CE11; CE13; CE14; CE17). Internship programmes were supported by some participants as it introduces people to the business, and it allows interns to determine whether they will fit in the business environment or not. It was mentioned that to hose an intern in a more rural setting is a challenge in terms of accommodation etc. (CE2). CE3 hosted a student to assist with the development of social media presence and awareness which was successful. CE4 offers internships in an ad-hoc manner and the participant stated that it exposes a candidate to different sectors, which is a good basis from which to develop a career. CE8 employed an intern in 2020 but given the effect of COVID-19 interns have not been employed to date. The participant, however, indicated that placements of learners should benefit the business since investment is made into these candidates in the first 3 months and thereafter, the business reaps the benefits. CE9 has implemented learnerships, mainly related to the kitchen but has also employed one of these candidates permanently. CE11 stated that he implemented learnerships in the past, but it was not easy. He, however highlighted the value of this approach as it gives exposure to the sector and how it works. He stated that this contributes to the improvement of the sector. CE13 take in learners that need to complete a practical year to obtain their diplomas – it provides them with practical experience and the centre has an extra person that can assist with the activities. CE14 supports the learnership concept. CE17 does take in learners and also learn from them but the learners earn practical experience.

Secondly, those **unsupportive of internships and learnerships** discussed the following aspects (CE5; CE7; CE10). CE5 is not participating in learnership programmes. CE7 does not offer internships but focuses more volunteer programs. CE10 did employ learnerships but indicated that it did not work in this line of business.

The major themes emerged supportive of learnerships and internships and those unsupportive of learnerships and internships.

6.2.1.3 Knowledge of CATHSSETA-related opportunities

To assess the knowledge of participants related to CATHSSETA and relate programmes a discussion related to participation in opportunities created by CATHSSETA was done.

The first theme that evolved from these discussions relate to **no, to limited knowledge and involvement**. CE1 indicated no involvement with CATHSSETA due to their organisation being focused on environmental management. It was stated that they would prefer to link with CATHSSETA. CE2 also indicated no involvement but a willingness to do so. CE3 stated [CE3…*there is very little CATHSSETA offers when it comes to the conservation side*]. CE4 did not work with CATHSSETA but they did work with the AgriSETA. CE11 was part of a Recognition of Prior Learning process before but not necessarily with CATHSSETA. CE10 stated that they belong to WRSA and local tourism associations but are not involved with CATHSSETA. CE7, CE13, CE16, CE17 and CE18 indicated no knowledge of CATHSSETA.

The second theme relates to **current and future involvement with CATHSSETA**

The training of guides through the CATHSSETA system was recognized but the need for technical training in conservation was highlighted (CE3). CE6 stated that the process to become a registered service provider with CATHSSETA is too onerous and so people do not do it (CE6) – the systems need to be improved. CE6 stated that regarding CATHSSETA [CE6... *I think it is the right initiative; the structure is in place, but it is not properly applied*]. CE8 has benefited personally from CATHSSETA by attending a Global Executive Development program – [CE8…*I am an enormous supporter of them*]. CE9 has knowledge of CATHSSETA and has submitted its workplace skills development plan and training requirements, but he indicated that he has not seen initiatives that are relevant to its line of business. CE14 is involved with CATHSSETA with employees registering for courses related to field guiding and hospitality.

The major themes emerged as no to limited knowledge and involvement and current and future involvement.

6.2.1.4 Involvement in the sector

a. Input to policies and strategies

In terms of active involvement in the sector's development regarding inputs to policies, development plans and workshops two themes were noted namely involvement through organisations and associations and no involvement.

Firstly, **involvement in the sector through organisations** revealed the following (CE1; CE2; CE3; CE4). CE1 indicated involvement in the review of strategies on previous occasions but then their involvement decreased due to challenges experienced in the business and the business environment during COVID-19. As a member of an industry association, CE2 stated that the organisation is reviewing relevant policies and he would prefer higher levels of involvement in training on a personal level. CE3 has been very involved on a national level focusing on issues of security in conservation and providing input to policies but working with the government is a challenge. CE4 is involved in working with Cape Nature and thus cooperation is more on a local level.

CE7 is also involved with Cape Nature and the organisation attend the meetings of stakeholders to discuss adapted policies and strategies. CE8 serves on an educational advisory board and other wildlife organisations – it was stated that there is a positive trend with more attention given to the opinions of the private sector. CE11 indicated the importance of being involved in these processes as the sector knows how it works – he has been involved in several committees providing input to the sector. CE14 indicated [CE14… we attend workshops on a regular basis]. CE17 indicated high levels of involvement but are not sure whether this input actually means something as it was said to him [CE17…*you are a stakeholder; government is the decision-maker*]. CE 18 serves on the board of a major members association and provincial chapter and therefore participate through these organisations.

Secondly, **no involvement with the sector** (CE6; CE9; CE13). CE6 had no direct involvement in terms of policies and strategies on a higher level. CE9 has not provided input into policies etc. before. CE13 is not actively involved and serving on committees but when asked they will assist.

The major themes that emerged involved involvement through organisations and no involvement.

b. Membership of relevant associations and organisations in the sector

The discussions led to the development of three themes, namely involvement on a national level, involvement on a local level and no involvement at all.

Firstly, on a **national and international level** the participants form part of the major organisations and associations. CE3 is a member of Wildlife Ranching South Africa (WRSA). For CE1 there are high levels of involvement with organisations such as Advancing Chicanos/Hispanics & Native Americans in Science (SACNAS) and the International Association of Wildland Fire. CE4 is also involved with SACNAS. CE6 is a member of the Southern Africa Tourism Services Association (SATSA) and Fair Trade. CE7 is a member of SATSA, The Pan African Association of Zoos and Aquaria, The World Association of Zoos and Aquarium and the Madagascar Fauna and Flora group. CE7 has also participated in the Lilizela Awards and won before. CE9 is a member of SATSA. CE11 is a member of WRSA, Safari Club International and several international organisations. Being a member to an international organisation gives access to the international market especially for American hunters. CE18 is a member of WRSA.

Secondly, on a **local level participation**. CE3 forms part of a private owner-management conservation organisation that is focused on the conservation of the rhino. There is also involvement in organisations such as the Waterberg Security Initiative and the Save the Waterberg Rhino. CE9 involved in certain local business organisations. CE13 is involved in conservation associations dealing with endangered species as well as local conservations organisations. CE14 indicated involvement in associations focused on marketing. CE16 is still new to the position but she stated involvement with Cape Nature. CE17 is actively involved in associations and organisations dealing with hunting and wildlife.

The major themes that emerged indicated national and international participation and local participation in a variety of organisations.

6.2.1.5 Future perspective on the conservation sub-sector

a. Future work in the conservation sub-sector

According to the discussions with the participants the future work of conservation depends on the people, and sustainable approaches. CE9 indicated that there lies a good future ahead if the industry can validate its contribution to the economy.

Firstly, the **sustainable approaches** being followed in the future are important. CE3 indicated that the approach to conservation will be more focused – [CE3…*there is definitely a good future for conservation, no doubt*]. CE1 noted concerns around the budget, capacity and desire to drive conservations for public organisations – [CE1...*we're going to see more and more private conservation estates standing up*]. CE4 also supported the growth of the private sector and indicated that there would be more pressure on the government to look after nature. A topical issue currently is sustainable energy, and the country needs environmentalists to work in this space. Greenwashing is a major challenge, and an external sustainability metric should be developed to measure businesses' footprints (CE8). CE6 is concerned about the lack of plans to make the circumstances in South Africa better, as that will influence the future. There are several opportunities in illegal wildlife trafficking as it is increasing, and more people are needed to control this. The current work being done with the Biodiversity Act might lead to more places being protected as well. CE11 indicated that this is a good industry in which one needs to apply the law in the right way. The future of conservation will become more challenging due to funding and space. If people do not realise that they are taking the space of the animals we might end up with animals in a captive situation – [CE13…*that will be really, really sad*]. It was indicated by CE8 that the SA model related to fencing should be exported to other African countries to conserve nature.

Secondly, the **people** are critical stakeholders in the future CE3 indicated that it will become more important to cooperate with communities. There is a future for conservation in South Africa, but it was stated that it should be a more integrated effort between different roleplayers (CE2). CE4 stated that there will always be a need for good and motivated young people to work in the conservation sub-sector. CD14 stated the importance of the youth in taking conservation forward which highlights again the necessity of skills and experience transfer. CE16 indicated that more hands are needed in conservation but also that more money will be needed to facilitate this process. CE17 stated [CE17…*the sector itself got huge potential*]. It is however important to [CE17…give people ownership through utilisation] and in this way one can create value. CE18 stated the importance of upskilling people in rural areas to ensure sustainability – [CE18… *The private sector wants to help and contribute but the lack of urgency and poor regulation and legislation from Government undermines these efforts*]. Future work will require more report writing, data analysis and cooperation with communities. CE5 supported the future of work in the conservation sub-sector based on so many natural assets that South Africa has.

The major themes that emerged included sustainable approaches and people.

b. Other comments

The participants highlighted the following aspects that they consider as important in developing this sector:

- Security is one of the main challenges facing this country and it is important to ensure that the basic requirements for tourists are in place before inviting them to visit this country. From a farming/tourism/conservation perspective
- CE2 stated that land restitution discourages investments in the land and the people living on the land – thus moving backward. It is important to keep the conservation sub-sector relevant and education plays a significant role in this.
- CE1 stated that [CE1…*We actually have to do things differently, but do not forget about the old way of doing things*].

- CE5 stated that stronger political leadership is needed to drive the economy, but safety was also mentioned as a challenge.
- CE9 stated that [CE9… *I do not think that government really understands the tourism industry properly*]. This misunderstanding is influencing the policies and strategies to take the industry forward.
- CE13 stated that there is always a play between tourism and conservation – one needs tourism to fund conservation, but you cannot allow people to touch the animals, which could create higher income. Skills development was highlighted as an important aspect for the future.
- CE17 advocate for understanding that sustainable utilisation is key.
- CE18 wants so to see more integration between hunting and tourism since hunting is part of our heritage.

The major themes that emerged relate to limited investment in conservation, sustainable utilisation, security, lack of leadership and the interplay between conservation and tourism.

6.2.2 The Conservation sub-sector: An academic perspective

6.2.2.1 Background to the involvement of academia in the conservation sub-sector

The participants were drawn from a variety of educational institutions as can be seen in Table 6.2.

Table 6.2: Positions and duration of involvement

POSITION	CODE	DURATION OF INVOLVEMENT
Head of the Department of Nature Conservation	CA1	24 years
Head of Research at a tertiary institution related to ecotourism research	CA2	18 years
Teaching nature-based and natural area tourism	CA3	22 years
Teaching conservation	CA4	10 years
Teaching conservation	CA5	22 years
Executive Director of training	CA6	3 years

Academics with significant experience in teaching conservation related subjects participated in the interviews. They can provide perspectives over time.

6.2.2.2 The educational landscape

a. Changing educational landscape for conservation

The educational landscape was influenced by a number of external factors of which COVID-19 was the most significant. It is important to determine how the educational landscape has changed as that influence future planning and development.

From the discussions the **changing student/learner** was identified (CA1)

CA 1 indicated that students enter with less general skills, hands-on stuff such as changing a wheel and knowing how to drive. CA1 stated that conservation is not taught at school level, which influences it as a career choice after grade 12.

Secondly the **changing teaching landscape** was identified (CA1; CA2; CA4; CA5; CA6).

CA1 stated [CA1...*technology is advancing faster than most academics and deal with*]. In the online environment of teaching, one loses non-verbal communication, the classes are shorter and the experience is different. CA2 stated that COVID-19 led to a rethink of what is done in the education environment and also questioned the real competencies needed in the World of Work. CA4 stated that there is a significant change in the age group of academic teaching conservation who is young and upcoming. CA5 indicated that there is a gap between conservation and tourism on an educational level – [CA5…*to include more conservation aspects in tourism and more aspects in conservation*]. CA6 stated that based on her assessment over the last three years there should be more focus on the indigenous elements to be incorporated in conservation products – one needs to tailor-made the South African experience.

Thirdly the **changing external landscape** was identified (CA3; CA1).

CA3 stated that the landscape has changed, and the focus has shifted to more practical information, soft -skills and communication, especially with communities. CA1 stated that [CA1...*when we send the student out, there is a lack of leadership in the conservation field*]. It was said that many of the "old hands" left the conservation sub-sector leaving significant skills and knowledge gaps to be filled. People from other disciplines work in the conservation sub-sector without an understanding of it as a field (CA1).

The major themes that emerged relates to changing learner/student, changing teaching landscape and changing external landscape.

b. Curriculum changes

Based on the discussions with the participants the importance of **re-curriculation** was realised. This was however done in different ways and the content is not standardised at different higher education institutions.

According to CA1 **re-curriculation** was done and the current offering is a three-year diploma in nature conservation and one in wildlife management. One can then articulate to the higher levels of learning related to the subject field. Attention is given to content that will improve the conservation leadership for example, the inclusion of project management in the qualifications. CA2 noted that [CA2...*higher education institutions cannot exist in isolation, we need to constantly engage with the industry*]. This is important so that industry-relevant qualifications are offered. CA6 advocated for the inclusion of indigenous content in courses. She identified language as a barrier with many people working in this sector not able to communicate with visitors on the right level – this influences their perceptions of service delivery. Added to this she highlighted the importance of intercultural communication in the workplace and between employees and tourists but also indigenous foods and beliefs. To some extent one needs to capture the stories and do storytelling as part of the conservation product which can also be included through a re-curriculation process.

The major themes that emerged include re-curriculation, the importance of project management, indigenous knowledge, intercultural skills and communication and higher levels of engagement with the industry.

c. The effect of bodies such as the Department of Higher Education on programme development

From the discussions themes around a place and a need for the DHET processes and high levels of frustration emerged.

Firstly, there is a **place and a need for the DHET process** (CA1; CA2). It is positive that the Department of Higher Education gets organisations to go through an accreditation programme, hand-in-hand with SAQA. However, the different Departments should cooperate to ensure that there are not too many or too few people working in a specific sector. CA1 stated [CA1... *we are training far, far too many students*]. CA2 stated that the development of new qualifications is guided by DHET,

Secondly, there are **high levels of frustration** (CA2; CA3; CA4; CA5; CA6) for academics working in this sector. CA 2 stated that determining the needs of the sector related to education is important but significant time is spent on consultations. CA3 stated that all changes and programs must be approved by DHET, which is a lengthy process. CA4 mentioned a recent registration of an honours program with DHET, which he stated as being [CA4…*quite a battle*]. CA5 state that it is a challenge to go through the DHET processes [CA5…*just sometimes very, very time consuming and frustrating*]. The red-tape with all the processes creates frustrations – CA6 completed an international accreditation of a training programme and it was approved within three months. They have been waiting for feedback on the accreditation of their programmes in SA for 11 months – the major frustration includes [CA6…*a lot of skills development providers does not have the administrative capacity to work through all the documents].*

The major themes evolve around a place and a need for the DHET process and high levels of frustration.

4.2.2.3 Labour-related information

a. Qualifications and skills relevant to the conservation sub-sector

The following **conservation related content** and were mentioned. CA1 indicated that skills related to habitat, population dynamics, diseases and techniques are relevant. It was clear from the discussion that there was a paradigm shift in conservation that has not completely filtered through to academia. There is a move to conservation landscapes where conservation is done inclusive of people. CA4 indicated that his department offers a diploma related to nature conservation as one of their strongest courses. Students can however move up to a doctorate level in conservation which is then focused on research. CA5 offers a diploma in nature conservation and wildlife management – the occupations linking to these qualifications vary but becoming a conservationist is an important one. CA5 highlighted the importance of ecology and biology skills.

The following **tourism related content and more general management knowledge** were mentioned. CA2 indicated the offering of an ecotourism management qualification. He highlighted the importance of people skills, soft skills, problem-solving skills, critical thinking skills and customer service skills. CA3 stated that the qualifications are not solely based on conservation as it leans towards nature-based tourism. It assists the employee in the field if they understand both tourism and conservation. CA5 highlighted the importance of people skills – people working in conservation also encounters tourists and they must be able to communicate with them. CA6 highlighted the importance of occupational certificates for trade occupations in SA but also international certificates.

The major themes that emerged related to conservation specific skills and tourism and more general skills.

b. Changes in skills pre- and post-COVID-19

It was clear from the discussions that COVID-19 led to significant changes in which and how skills were taught. CA1 stated that during COVID-19 everyone moved everyone away from the basics and now the focus is to get back to the basics and expose the students to practical work as they lack these skills after the pandemic. One skill set that became more important post-COVID-19 is problem-solving skills (CA2) specifically related to business closing, contingency plans etc. Students need to think on their feet, think quickly and be innovative. CA3 indicated that COVID-19 led to people being able to adapt, which is supported by problem-solving skills. It was also stated that it is important to know how to work with communities and with tourists and be adaptable in the workplace (CA3). CA4 mentioned the importance of time management – especially during the pandemic an added the importance of people management skills, the ability to work independently, critical skills and technology skills. CA5 also mentioned the importance of technology after COVID-19 and working with people. Communication was highlighted as one of the most important skills, followed by occupational health and safety skills, interpersonal skills and also other soft skills (CA6). Emotional intelligence was mentioned by CA6 as important. Post-COVID-19 tourists are aware of their impact on the environment and want to know how their money is spent.

From the discussions people skills, problem solving skills, critical thinking skills and adaptability were identified as the most important skills.

c. Changes in occupations related to the conservation sub-sector

The discussions related to changes in occupations point to a more integrated approach between tourism and conservation and the importance of technology in this sector.

It was indicated by CA1 that occupations might not change, but due to the drop in funding related to conservation, the approach to conservation might have to change by involving major companies to fund conservation landscapes and products. Due to a lack of funding CA5 also indicated that **conservation and tourism might be integrated in occupations** moving forward. After CA1 reviewed their program offerings it was realised that the curriculum is talking to the challenges of 10 years back.

Significant changes are needed to align the curriculum with the occupations of today. Technology has significantly influenced the way business is conducted. CA3 stated that it is important that the community benefit from the conservation areas and be involved in these areas. This might include delivering certain services to the lodges in and around the conservation areas. CA4 indicated the development of entrepreneurs when it comes to conservation to a system where humans and animals can co-exist. CA6 mentioned that because people are aware of what they eat, how it is sourced there will be a move towards more local indigenous sourcing. This can change the product put on the table and the way it is used to attract tourists.

The major themes involve around the same occupations but a more integrated skill set; the importance of technology, integration of conservation and tourism in the workplace, and training of entrepreneurs.

d. Shifts in the labour profile of the conservation sub-sector

Different opinions were evident from the discussions related to the profile of the conservation sub-sector.

Firstly, the **influence of government** was noted. It was stated by CA1 that the profile has changed but more from a political point of view – [CA1... *government uses to push people into conservation jobs who should not be there, particularly in leadership roles*]. South Africa is losing conservation leadership. What is good are the panels set up by the Minister to have the expertise to assist with difficult issues and situations for example, the panel for lion hunting.

Secondly, **the ideal person conservation sub-sector employee**. It was noted by CA2 that one should focus less on producing graduates who are employable but also on producing graduates who can become employers themselves. CA3 emphasised the importance of communication skills and problem-solving skills but did not indicate any specific shift. CA4 stated that employees in conservation need to be able to work with people, work independently, and also outside apart from people. Critical thinking was also indicated as important, the ability to determine what is happening and how to improve the situation. Unfortunately, the pandemic caused anxiety and stress which left the sector with high levels of anxiety and depression especially those working in remote areas and work uncertainty. In the new landscape of conservation, CA6 indicated the importance of understanding the financial picture of the business.

The major themes that emerged include the influence of government and the ideal conservation sub-sector employee.

e. Attractiveness of the conservation sub-sector for learners

Participants were requested to comment on the attractiveness of the conservation sub-sector for potential learners.

Firstly, **factors inhibiting the attractiveness of the sector** (CA1; CA3). it was stated that it is not an attractive sector because of limited access to what it entails at school level. Additionally, people want to study fields where they will earn money and conservation is not considered as such (CA1). There are, however, many people that need to work and the balance between demand and supply becomes more challenging (CA3).

Secondly, **factors increasing the attractiveness of the sector** (CA2; CA3; CA4; CA5). CA2 stated that the tourism industry remains attractive to students and there is a high demand for programs related to this industry. CA3 stated [...*there are lots of people that are passionate about conservation, it is still attractive*]. The attractiveness lies in the need to work outside in nature (CA3). CA4 stated that [CA4…*it may be more attractive now than it was before the pandemic*]. This relates to the fact that people want to be outside and work in nature. CA5 indicated that the enrolment numbers are an indication of attractiveness and at her institution there are sufficient numbers. She said that they are not attracted by money but more because of their passion for nature and the motive to make a difference.

The major themes evolved around inhibiting factors and factors increasing the attractiveness of the sector.

f. Level of professionalisation of certain occupations in the conservation sub-sector

Professionalisation is an interesting debate for many years. The participants felt that South Africa has very unique expertise and can be considered the leader with it comes to Savannah and the management thereof. CA1 stated [CA1... *we are certainly a key role player in world terms*]. CA5 also felt that it is important to work towards professionalisation. CA4 indicated that certain occupations are not regarded as professional in the conservation sub-sector. There is a need to move towards the professionalisation of certain occupations in the sector but not all.

The major themes include a need to move towards professionalisation of certain occupations in the

conservation sub-sector.

g. Challenges in the labour market related to conservation

On the question related to the challenges in the labour market the academics had interesting responses from both an industry and employee perspective.

Firstly, from **an industry perspective, economic challenges** are evident. It was stated by CA1 that unfortunately, wildlife management is one of the first things to go under difficult economic circumstances. Thus, product owners did not take students in the last years, and they are now looking for qualified people. The importance of classifying conservation as part of the business sector was also highlighted. CA1 stated [CA1...*I believe that conservation has to be moved into the business sector, where the conservation of biodiversity is business*]. CA5 indicated that funding is the main challenge since conservation needs to generate their own funding to conduct their tasks.

Secondly, **relevance of qualifications** since students struggle to get work in their respective sector. CA2 mentioned that students with tourism related qualifications do not always get employment in the industry but move into other sectors as well. It is important that employers know that there are students with relevant qualifications that will fit their organisation better than those with general qualifications. The major challenge is that it is not only conservation skills that are important; there is a need for a more comprehensive training package that will include aspects such as project management, communication skills etc. CA4 also mentioned the challenge of not entering into the position that a person studied towards and then they have to settle for something else. It might also be that one loses excellent students in this way. CA6 indicated that one of the biggest challenges is accessibility of opportunities in rural areas – people are not aware of what is available in the sector. On the note of internships CA6 indicated that in remote areas there are no accommodation available to learners and therefore learners are not placed in rural areas which is actually where assistance is needed.

The major themes focus on economic challenges in the industry and relevance of qualifications.

6.2.2.4 Future look of the conservation sub-sector

a. Future of conservation as part of the tourism industry

On the question related to the future of conservation as part of the tourism industry the responses were clear – there is a need to integration between the tourism and conservation sub-sectors.

CA1 stated [...without conservation, there is no tourism]. South Africa is unique in terms of the conservation landscape, and it needs to be conserved for the utilisation of tourists but also for giving back to the conservation effort. The tourism industry cannot exist without conservation – [CA2… *I think it is the heart and soul of the South African tourism industry*]. CA2 stated that [CA2...*tourism and conservation go hand in hand…if we lose conservation, we lose a big part of the tourism market*]. CA4 indicated that more privatisation might happen in the future trying to balance the between humans and animals. There can only be a future for this sector if there is cooperation between conservation and tourism and both realise their mutual value (CA5). It is important as the sector moves forward that everyone realises the value of this resource – create as many opportunities for tourists to experience nature in a sustainable manner. There is, thus an interdependence between tourism and conservation.

The major theme includes the interdependence between tourism and conservation.

b. Important aspects of developing this sector

In this section the participants could indicate the aspects that are important in developing the conservation sub-sector. There was a clear focus on further development through small business growth and conservation awareness.

CA1 stated that it is critical that more wildlife is consumed by consumers since game has less impact on the environment and has fewer diseases. It is also important to make biodiversity conservation an arm of the business. CA2 stated that more attention should be given to small businesses to grow them to the next level, as this will create more opportunities to enter the industry. Moving forward, it is important that communities benefit from the conservation areas and developing soft skills is becoming more important (CA3). CA4 stated that it is important to create awareness around the conservation sub-sector not only among those directly involved but amongst all South Africans. CA6 feels strongly that we are losing storytelling opportunities before these stories are lost, and this can tie in with the experiences given in the conservation sub-sector.

The major themes include small businesses growth and conservation awareness.

6.2.3 The conservation sub-sector: A government and quasi-government perspective

6.2.3.1 Background to the involvement of government in the conservation sub-sector

The participants were drawn from a variety of government and quasi-government organisations as can be seen in Table 6.3.

Table 6.3: Position and core responsibilities

POSITION	CODE	RESPONSIBILITIES AND DURATION
Management position	CG1	Threatened or protected species (26 years)
Management position	CG2	Ecological services (35 years)
Large mammal Ecologist	CG3	Ecological services (15 years)
Executive Director	CG4	Conservation practices of a public entity (14 years)
Executive Director	CG5	Ecotourism (17 years)
Biodiversity officer	CG6	Biodiversity related services (14 years)

The participants have vast experience in the conservation sub-sector.

6.2.3.2 The conservation labour landscape

a. Changes in the labour landscape and occupations

On the question related to the changes in the labour landscape three themes emerged namely a changing workforce and workplace; changing conservation landscape.

Firstly, **a changing workforce and workplace** was evident (CG1; CG2; CG3). CG1 stated that the workforce is much younger, and they enter the sector with higher-level qualifications. Moving forward, it was stated that the government departments should offer more relevant conservation courses focused on the conservation content. According to CG2, conservation has become more complex, with tourism playing a more important role. Previously funding was given by the Government, but this has decreased, which puts more emphasis on tourism as a contributing factor in terms of funding. CG2 indicated that conservation products might not be in touch with the conservation needs of tourists, which is information that is lacking. He stated that the people trained in tourism should manage the tourism facilities and not those trained in conservation. CG3 stated that the landscape has changed in a way that the conservation requirements are now multifaceted and transdisciplinary. Thus, conservation is not done in isolation there should be integration with tourism, marketing, business management etc. CG2 stated that various policy interventions have changed the world of work – for example, some BEE requirements. It was stated that it is difficult to get people with the necessary qualifications to do the work and added to that, it is very hard to hold on to them.

Secondly, the **changing conservation landscape** (CG2; CG4; CG5, CG6) was highlighted, and this directly influences the labour market. CG2 mentioned the effect of managing the Big Five and considering the effects of global warming moving forward. The role of monitoring was mentioned with specific reference to the use of technology. CG4 also stated that the conservation landscape has changed but that this organisation played moved towards a more active role in the lives and livelihoods of people and communities and the regional economy. They aim at influencing how people think about nature conservation aspects such as mountain catchments, water saving etc. This led to higher awareness levels in communities. CG5 also indicated that the landscape had changed significantly where 17 years ago, conservationists fenced the nature reserves and kept the visitors out, but today tourists are invited, and gates are opened. This organisation invested money in infrastructure that led to income from visitors – [CG4… *showing tourism is not the enemy*]. It was clear that for conservation to be relevant today one needs a holistic approach taking the needs of all stakeholders into account. CG6 also supported the changing landscape – [CG6… *starting to be more people centered*]. It was clear that one cannot only protect nature, it is important to look at the sustainable utilisation to mitigate potential risks. This notion supported stakeholder management.

The major themes that emerged are a changing workforce and workplace and a changing conservation landscape.

b. Development or accreditation of qualifications in the conservation sub-sector

This question focused on participants involvement in the development or accreditation of qualifications. From the discussions two theme emerged namely accredited training and ??

Firstly, **accredited training was highly supported by the participants**.
CG2 has not developed qualifications or accredited any qualifications. When training is offered, it is very basic, but there is a need to address the training and development needs of conservation. CG2 said [CG2...*I think training and development are absolutely crucial; ...we are lagging behind*]. There is a plan to roll out a training programme with the South African Wildlife College. There is also a need for good mentors, which comes at a price. CG3 indicated that he and his team does not develop any qualifications but are involved with higher institutions in teaching and supervising post-graduate students.

Secondly, **capacity building training** was supported by the participants.

CG1 indicated their involvement in internships and scientific capacity development in the department and the provinces – linked to SANBI. CG4 indicated a high level of involvement in training with a focus on vocational training and skills training through the EPWP-programme. People are trained in financial management and management skills as well. The EPWP-programme services communities with a strong training element. All training happens through accredited training providers who are given certificates.

Thirdly, **internships were supported**. CG1 indicated their involvement in internships. CG4 indicated that their organisation takes 10-15 work-integrated students in conservation and employs 15-20 small businesses that are also trained. Certificates are issued as this is accredited training through CATHSSETA. CG5 indicated the use of internships that are employed across the different areas of the organisation. CG6 also supported the use of internship programmes to acquire practical experience.

The major themes that emerged include accredited training, capacity building training and internships were supported.

c. Type of skills needed to work in the conservation sub-sector

The discussions around the type if skills needed to work in the conservation sub-sector were focused on specific skills. It was recommended that industry and academia meet to unpack the needs of the industry in terms of skilled workers.

General skills:

- Analytical skills (to be able to analyse different situations and provide solutions where needed) (CG1)
- Conflict resolution skills (CG1)
- Problem-solving skills (CG1)
- Public speaking skills (CG1)
- At a managerial level – stakeholder skills (communication with communal property association that owns land in the parks are important. Working with communities has not been part of previous training, but it is now part of the world of work and training is needed in this regard. (CG2)

- Leadership (CG2; CG5) (More generalists and specialists are needed a management level)
- Communication skills (specifically in conflict situations) (CG3; CG5)
- Negotiation/facilitating skills (how to facilitate and allow people to participate in decision-making) (CG3)
- Critical thinking skills
- Soft skills as a whole – skills that makes one a good human being (CG4; CG5)
- People skills (how to convince people to voluntarily comply with legislation) (CG4)

Conservation related skills:

- Basic field knowledge (CG2)
- Monitoring skills (CG2)
- Technical skills (CG2; CG5)
- Ecological expertise (CG2)

CG6 indicated that management skills are important, but also conservation and tourism-related skills. The interdependence of conservation and tourism is recognised.

The major themes that emerged include general skills and conservation related skills as well as the interdependence of conservation and tourism.

d. Changes in skills pre- and post-COVID-19

During the discussions related to the changes in skills pre- and post-COVID-19 certain trends were visible. It was clear improve levels of management and leadership was needed after the pandemic. This lead to the identification of three themes namely changes in the business environment and changes in employee skills set.

Firstly, the **changes in the business environmen**t (CG1, CG6). COVID-19 led to a move to the online environment with online meetings and the management, thereof. Participants found it difficult to manage negative comments and remarks online (CG1). Risk management, however, is now important in the workplace where there is a need for staff support through a wellness programme. CG6 stated that COVID-19 brought a new way of doing business with reference to technology and electronic systems.

Secondly, the **changes in the skills set of employees** relate to planning skills (CG2), flexibility (CG3), people skills (CG4) and technical skills (CG4).

The major themes that emerged include changes in the business environment and changes in the skills set of employees.

e. Changes in occupations related to the conservation sub-sector

According to the participants some changes are needed in terms of conservation occupations. The major themes relate to stakeholder management and integration. CG1 was the only participant that stated that she does not foresee any specific changes in this sector.

Firstly, **stakeholder management** received attention. CG2 stated that one's role in working with the communities is becoming more important, especially where the community is against the conservation area. Occupations might not be changing, but from a general perspective, there is a move toward stakeholder discussions and cooperation (CG4). This is where communication and interaction with humans as conservationists are becoming more and more important.

Secondly, **integration** becomes more important. CG5 indicated changes focusing on integration, and more focus on joint accountability for the things happening in conservation and tourism. CG6 stated that it is now more important to attract employees in the tourism sector to have another income stream – thus the integration of tourism and conservation.CG5 stated the need for a conservation economist that can assess the conservation status of a reserve and indicate what should be done to generate income in a sustainable manner. Thus, integrating business principles with conservation.

It was also noted by CG4 that it might be time to 'delete' the term conservation as there are a number of negative connotations to this term and move to the term sustainability. The requirements of sustainability are different, and even though very few people are trained in this space, it might be a consideration moving forward.

The major themes that emerged include stakeholder engagement, and integration. A move towards the term sustainability away from conservation was recommended.

f. Changes to the labour profile related to the conservation sub-sector

On the question related to the changes to the labour profile one theme emerged namely workforce profile changes.

The theme **workforce profile changes** emerged. CG1 stated the age distribution of the workforce as being younger, more females working in this sector and an improved geographical distribution of employees across South Africa. On the contrary CG3 stated that changes in terms of gender, race and representativeness have been slow in this sector. CG4 also noted significant changes in the conservation sub-sector over the last few years, with more young black males and females that joined this sector. These candidates are highly trained and contribute to the sector's growth. CG4 stated [CG4... *absolutely, there has been some interest and it is very encouraging, I am really thankful for that*].

CG2 stated that the hands-on skills and knowledge are deteriorating, and this will affect aspects such as monitoring. Technology is becoming more important and forms part of the workplace. It was stated that there was a definite shift in the labour market, but people adapted along the way, and therefore, the functions and responsibilities changed in the same position. It might be needed to re-write certain job specifications to what is happening in the industry (CG3). It was also highlighted that it is not relevant to be a jack of all trades anymore – one need specific training.

The major theme that emerged include a changed workforce profile.

g. Attractiveness of the conservation sub-sector to students and learners

From the discussion related to the attractiveness of the conservation sub-sector to students and learners two themes emerged namely unattractive and unrealistic expectations.

It is clear from the discussions that the sector is **unattractive, and learners have unrealistic expectations of the sector**. CG2 stated that there is attractiveness on a higher level, but the young people entering the sector do not want to work in remote areas where there are no internet and entertainment – they might have been enthusiastic in the beginning, but that does not last and the negativity manifest in their behaviour and work ethic. CG 3 stated that the conservation sub-sector is not the best-paying sector and [CG3… *if you have somebody that is motivated by income, they probably not going to go there (rural areas)*]. Unfortunately, CG4 stated that [CG4… *the conservation sub-sector has always been almost like a stepchild of the government*]. There are more pressing matters, such as education, health etc. It is not considered an attractive sector due to a limited number of jobs, low salaries and limited benefits in some conservation organisations. Added to this, funding to do conservation is limited.

CG1 stated that in the government department where she works, they receive a significant number of applications if there is a vacancy. This might be due to the package offered, which includes certain benefits. There are, however, several people applying with irrelevant qualifications as well. CG 5 stated that working in conservation is a calling but that there are enough people that can join the sector because they want to make a change. It is critical to review salary structures and give attention to career advancement in the conservation sub-sector.

The major themes that emerged include unattractiveness and unrealistic expectations.

h. Challenges related to labour in the conservation sub-sector

The discussion revealed a number of challenges of which the **labour pressure** was the most important one. CG1 stated that the occupation-specific dispensation scheme is good for the government but also creates challenges. One cannot build a career path since one starts at the bottom salary again. CG2 stated that the labour unions are pushing for more and more financial benefits for employees, which affects the sustainability of conservation areas to sustain themselves. It was indicated that the changes are needed but it comes at a huge cost. CG3 stated that it is important not to exploit the motivation of youngsters when they enter the industry as they are eager to work. It was added that higher education institutions are not preparing the youngsters for the conservation space regarding soft skills, project management and financial skills. A major challenge is the well-trained young people that enter the sector, stay for 2-3 years and apply for a management position without experience – if they do not get the position, they leave the sector. CG4 stated that when positions are advertised anyone applies with or without the qualifications.

CG5 stated that law enforcement and poaching are two significant challenges, but there are insufficient manpower and resources to deal with these issues.

The major issues that emerged include labour pressure, and limited resources to address for example poaching.

6.2.4.3 A future look at conservation

a. The future of conservation as part of the tourism industry

The discussion revealed one theme namely the integration of tourism and conservation.

The **integration of tourism and conservation** was evident form the discussions (CG1, CG2, CG3, CG4, CG5, CG6). CG1 stated that tourism and conservation are interlinked. In some instances, tourism provides the income that is needed to fund conservation projects. It is important that conservation and tourism are managed hand-in-hand (CG2) and that a balance is maintained. CG3 stated that conservation is going to be central, and it will remain central as a key point in South Africa. CG4 indicated that tourism is important for the conservation sub-sector, given the decreased budget and funding. It is, however, important to maintain high standards of quality of tourism products otherwise, it will lose its appeal to tourists and visitors. If more people can visit the conservation area, they will understand the concept of conservation better. CG6 considers conservation to be a key driver of tourism. According to CG5, there is a future for conservation and the tourism industry would have been much poorer without conservation resources. It is, however, important to bring some of the income back to the conservation agencies to enable them to maintain the conservation areas.

The major theme that emerged includes the integration of tourism and conservation.

b. The level of professionalisation of certain occupations in the conservation sub-sector

The discussion indicated support for the professionalisation of certain occupations in the conservation sub-sector. The sector indicated that high levels of professionalism already exist.

CG1 stated that there is a high level of professionalism in the sector. It was however noticed that the selection of the right staff is important for professionalisation. It was indicated by CG2 stated that the level of professionalism is not high at this stage but that it should be developed on a continuous basis. One should focus on the selection process and ensure that the right candidates are selected with a passion for nature and a willingness to go beyond the call of duty. It is important that conservationists keep themselves busy with conservation matters and tourism operators keep themselves busy with tourism matters but together, they form a success. Generally, across the conservation space, there is professionalism even though one might find the odd one out. CG4 also emphasised the importance of employing tourism professionals to manage the tourism part of the business, as people in conservation are not equipped to deal with ecotourism matters. CG5 indicated that professionalism is important, especially when working with the guests directly.

CG4 stated that [CG4... *training nature conservationists at a professional level must be maintained*].

It is also important that nature conservation agencies must maintain a science-based operation with scientific inputs to management. It was also stated that occupational-specific dispensations must be approached carefully as it is a costly exercise. CG6 stated that qualifications in both conservation and tourism enable a person to climb the ladder. The participants are positive about the professionalisation of the sector, especially for leadership, management and core occupational staff.

The major theme that emerged is support for high levels of professionalisation.

c. Aspects to consider as important in developing the conservation sub-sector

CG1 stated that there is not enough capacity to do compliance monitoring and enforce the laws that have been developed. CG3 stated that empowerment is needed across the spectrum linked to conservation. To do this, three aspects are important: Conservation management, conservation information and conservation benefit. The latter refers to tourism. CG4 felt strongly about the importance of convincing political figures of the importance of conservation and that it should be funded to a greater extent as this sector looks specifically after for example, water. CG5 stated that the tourism business should consider giving back to conservation as these natural assets belong to everyone – [CG5…*Because I have a vested interest, my business depends on a well-management conservation area*]. Information technology is becoming more important with specific reference to social media.

The major themes that emerged include monitoring challenges and funding.

6.3.1 The conservation sub-sector: An employee perspective

6.3.1.1 Background to the position in the business

The participants were drawn from a variety of organisations as can be seen in Table 6.4.

Table 6.4: Position and core responsibilities

POSITION	CODE	RESPONSIBILITIES AND DURATION	QUALIFICATIONS
Game Ranger	CEe1	Working in the conservation space (10 years)	Did not indicate
Assistant curator	CEe2	Working with "cats" in the wildlife management context (1 year)	Diploma in Game Ranch Management
Brand manager	CEe3	Working for an environmental services and consultancy company (4 years)	National Diploma in Conservation and BA in Philosophy and Politics
Head ranger	CEe4	Working in the conservation and	Diploma in Nature

		hospitality space (2 years)	Conservation and guide training
Chief Executive officer	CEe5	Conservation-oriented business foundation (3 years)	Did not indicate
General worker	CEe7	Different tasks associated with ecology on a game reserve (7 years)	Diploma in Ecology and course in human resource management

The participants have vast experience in the conservation sub-sector.

6.3.1.2 Labour-related information

a. Qualifications and training

CEe1 felt he had the requisite qualifications and skills to work in the sector. CEe2 holds a diploma in Game Ranch management, with training functions including animal training. CEe3 possesses a National Diploma in Conservation and a BA in philosophy and politics. CEe4 has a diploma in nature conservation and various training competencies, including guide training and other professional qualifications. CEe7 completed a national diploma in ecology, studied natural resource management and is a registered CATHSSETA assessor.

The major themes that emerged related to higher level of qualifications.

b. Appropriateness of qualifications/skills

On the question whether their participants qualifications and skills were adequate two themes emerged namely multi-disciplinary qualifications and skills and value of practical experience

Firstly, about **multi-disciplinary qualifications and skills** it was clear that participants hold a conservation qualification in most cases but also completed other courses. CEe3 believed the diversity in his qualifications and skills was appropriate for his occupation, particularly due to the complex nature of the occupation. CEe4 believed his unique combination of guiding and ranger qualifications makes them useful in both conservation and hospitality and tourism functions.

Secondly, the **value of practical experience** was noted. CEe2 felt that her qualifications adequately prepared her for her occupation, however, important skills were learnt on the job and valuable experiential learning was part of the course. It was indicated by CEe7 that his qualifications are applicable [CEe7…*basically, all the things I studied in the university are practically applicable in the working environment*]. He stated that both theory and practise are needed but indicated that more practical sessions will be good.

The major theme that emerged refers to multi-disciplinary qualifications and skills and value of practical experience.

c. Feedback on training and skills

The participants were asked to provide feedback on their training and skills from which two themes were identified namely expansion of the qualification and the importance of practical experience.

Although participants felt that their qualification is adequate, they did recommend the **expansion of the qualification(s).** CEe1 is a qualified guide but still feels that there is more to learn. CEe2 felt that while the course was good, more focus on conservation as part of game management would be beneficial. Also, focus on human-animal interaction in the real-world. Lodge management skills and communication skills were also indicated (CEe2). CEe4 indicated that nature guiding and conservation would be better suited as combined skills in one qualification to make graduates more employable and open more opportunities for those in conservation.

The importance of **practical experience** was visible. CEe3 asserted that he is happy with the qualifications, particularly the invaluable lessons learnt from the practical learning aspects. CEe3 indicated that research could be added as a component to the training and also emphasised the important of practical exposure. CEe4 indicated that he would have appreciated a bit more practical exposure as part of his qualification. Nature Guiding and conservation would be better suited as combined skills in one qualification to make graduates more employable and open more opportunities for those in conservation. CEe7 stated that more practical work is the only aspect that he will recommend to his training institution.

The major themes focused on the expansion of qualifications and the importance of practical experience.

d. Changes in occupations/positions due to COVID-19

The discussions related to changes in occupations and positions resulted in two themes namely job losses and changed working environment.

Firstly, the pandemic led to a number of **job losses**. CEe1 lost employment due to COVID-19 and was unemployed for months during COVID-19. CEe4 echoes the hardships brought about by the pandemic, with job security being a major concern in the sector. CEe7 stated that the impact of COVID-19 was felt by employees with some being retrenched. The business was however fortunate to receive clients through the government.

Secondly, the **working environment changed**. It was important to continue with the conservation function even though the tourism function came to a halt. CEe2 and CEe4 intimated that while COVID-19 was hard for everyone, they were lucky to continue with their conservation function. A new focus was on technology and social media to interact with clients and disseminate information about animal conservation and sustainability. CEe3 realised that while the financial effects of COVID-19 were devastating for tourism, work-life aspects like working from home or remotely became apparent and achievable in the conservation sub-sector.

CEe5 noted no significant changes in the principles of conservation due to COVID-19 except an unintended outcome of the pandemic being renewed interest by people in conservation.

The major themes highlighted the adverse effects of the pandemic through job losses and a changing work environment.

e. Critical core skills for the world of work

Participants had diverse but also overlapping opinions related to the critical core skills for the world of conservation work.

General skills needed:

- Communication skills (CEe1; CEe7)
- Ability to adapt to different situations (CEe1)
- Soft-skills (Teamwork, working with people) (CEe2; CEe4; CEe5)
- Organisation skills (CEe4; CEe7)
- Language skills, with reference to English (CEe4)
- Management skills (people; finances, human resources) (CEe5)
- Problem-solving skills (CEe7)

Conservation related skills needed:

Technical skills (animal behaviour, anatomy) (CEe2, CEe4).

Theoretical skills (Ecology management) (CEe3)

Environment Economics (CEe3)

Infrastructure management (CEe5)

Research skills (CEe5)

The ability to multi-task is evident from the skills listed above which relates to general skills and conservation specific skills.

f. New skills needed to work in the Conservation sub-sector (pre and post COVID-19)

Participants were asked to name any new skills that might be needed to work in the conservation sub-sector. Continuous learning and experience emerged as themes.

Continuous learning and experience are important for the conservation sub-sector with a definite need for refresher courses. CEe7 indicated that it is now more important to develop the skills already acquired than to learn new skills. Tracking (CEe1) was indicated for follow-up courses as well as, communication with community engagement and animal husbandry as a specialised technical skill (CEe2), data analysis and technology skills (CEe5). CEe3 also believes in life-long learning, and even though did not have many certificates, he focused on his experience as part of life-long learning. The ability to transfer skills and knowledge is key to the sustainability of the conservation sub-sector (CEe4). [CEe5…*Qualifications on their own, don't really hold water*]. Experience is key to the conservation sub-sector, particularly managing and maintaining infrastructure [CEe5…*So the work integrated learning aspect is vitally important*…]. To this end, CEe5's organisation offers a volunteer program to help students gain valuable experience. CEe5 noted a difference in skills and competency depending on the institution of origin of the student.

The most important skills that emerged include continuous learning and experience.

g. Up-skilling of the employee in the conservation sub-sector

The discussion on the up-skilling for employees yielded two themes. Only CEe1 indicated that up-skilling was left up to him with no assistance from the employer. Some employers meet employees halfway, but funding is difficult because they are mostly on contract. It is necessary for conversation organisations to up-skilling and do skills development for the sector and play a leading role in this (CEe4).

Firstly, **inhouse up-skilling** was noted. For CEe2, up-skilling is part of in-house skills training focusing on animals and much less on managing human staff and relationships. Some training aspects are online. Aspects like First aid and PDP training are initiated by the employer as a requirement (CEe1). CEe3's employer also provides in-house short courses to upskill its employees. According to CEe4, on-the-job up-skilling within the conservation sub-sector is critical, as practical aspects tend to be more important than the theory graduates learn in their formal courses. CEe5's organisation believes in up-skilling and has a training budget to cater for employee up-skilling. Interestingly technical skills like plumbing, tiling, and electronics are becoming important in conservation (CEe5). CEe7 stated that upskilling is important, and the game reserve offers conservation courses, followed by hospitality and tourism.

Secondly, **external up-skilling** was noted. CEe3 lauded the employer for the support provided for anyone seeking up-skilling or academic opportunities. Particularly the provision of funding and the required resources. Supervisory skills are important, and their development has created a career path for staff internally, opening up promotion opportunities (CEe5). CEe5 notes that CATHSSETA offers very little in terms of training oriented towards the conservation sub-sector and believes the SETA should offer accredited security and information technology training for conservation occupations.

The major themes focus on inhouse up-skilling and external up-skilling.

6.3.1.3 The future of the conservation workplace

a. The future of work

Regarding the future of work in the conservation sub-sector the responses were positive and two key themes were identified namely sustainable management of the sector,

Firstly, the **sustainable management** of the sector emerged. CEe1 believed the future of work in the conservation sub-sector was good due to the growth in tourism. CEe2 says conservation work is crucial for wildlife sustainability and human-wildlife interactions. Information and environmental education are key to the future of the conservation sub-sector, including politics, social media and community engagement (CEe3). CEe4 is positive about the future of work in conservation, with the potential linked to the ability of the sector to manage the environment sustainably, thus promoting the growth of the sector. The future of conservation is in the technology sphere and those skills are required in the sector, additionally community engagement abilities. The human element and multi-tasking remain key, hence the importance of soft skills.

Secondly, the **relevance** of the conservation sub-sector.

CEe5 also expressed a positive outlook for the future of work in the conservation sub-sector. Pent-up demand due to COVID-19 put the sector in the limelight, which is a positive. CEe7 is positive but also noted the challenges related to funding and people not recognising the importance of natural resources.

The major themes relate to sustainable management and remaining relevant.

b. Other aspects stemming from involvement in the sector

The participants could indicate any other aspects related to the development of the conservation sub-sector; two themes emerged namely stakeholder engagement and education and training.

Firstly, with regard to **stakeholder engagement** it was indicated by CEe1 that there is a need for communities to be engaged and made aware of important aspects such as poaching. CEe2 also indicated the need for more collaboration to be more inclusive.

Secondly, **education and training** were evident.

The upskilling of guides to better engage with communities was noted. CEe2 believed ideas and functioning in conservation needed broadening to allow the sector to evolve. CEe3 suggests that conservation relies on environmental education, social media tools and the human aspect of sustainably managing the environment. CEe5 identifies unemployment as a challenge for conservation, especially for recruitment, whereby people without passion for the job apply for the sake of employment, job- hopping then becomes a concern. Therefore, unskilled and unpassionate people may end up employed in the sector. CEe7 noted that it is important to him that people of all races are treated fairly in the workplace so that everyone work towards a common goal.

Other key aspects that emerged are stakeholder engagement and education There is an important interplay in the following scenario: there are high levels of unemployment of graduates, a number of people do not want to work in this sector (only option) and a significant number of unskilled employees are working in the sector.

6.4 QUANTITATIVE RESEARCH RESULTS: CONSERVATION

The quantitative research results are focused on the questionnaires distributed to role-players in the conservation sub-sector.

6.4.1 Employee profile

Table 6.5 summarises the Employee profile of respondents.

Table 6.5: Employee profile

Demographic characteristic			Demographic characteristic	
Age	**Percentage**		**Citizen**	**Percentage**
18-24	3.85%		South African	**100%**
25-34	**42.31%**		Foreign national residing in South Africa	-
35-44	**28.85%**		**Race**	
45-54	15.38%		Coloured	21.57%
55+	9.62%		Black African	**43.14%**
Gender	**Percentage**		White	**35.29%**
Female	**50%**		Indian/Asian	-
Male	**50%**		**Any form of disability**	
Non-binary	-		Yes	-
Highest qualification			No	100%
Non-formal education	16.33%		**Monthly income**	
General Education (High School)	**30.61%**		Much below-average income	3.85%
Certificate	8.16%		Below average income	**30.77%**
Tertiary Diploma	14.29%		Same as average income	**30.77%**
Bachelor's Degree	18.37%		Above average income	7.69%
Postgraduate Degree	12.24%		Much above average income	-
Province			Rather not say	26.92%
Limpopo	7.69%		**Platform used to obtain information about the sub-sector**	
Free State	11.54%		Television	11.81%
North-West	**26.92%**		Print media (newspaper/magazine)	12.50%
Northern Cape	3.85%		The internet	**23.61%**
Western Cape	**23.08%**		e-Word-of-mouth (Websites, Facebook, Twitter, Instagram)	14.58%
Eastern Cape	11.54%		Word-of-mouth (friends, work colleagues)	**22.22%**
Gauteng	11.54%		Travel/trade shows	9.03%
Mpumalanga	3.85%		Do not receive any	6.25%
KwaZulu-Natal	-			

From the employee profile it was evident that respondents were either black (43%) South African (100%), females or males (50%) or white (35.29%) South African (100%) females of males (50%) working in either North-West (27%) or Western Cape (23%) province. These respondents were between 25 and 34 years of age (42%) or between 35 and 44 years of age (29%). In terms of qualification the respondents held a Grade 12 certificate (31%) and the indicated that they earn either below the average income (31%) or the same as an average income (31%) whilst 27% rather not say. Most of the respondents studied at Walter Sisulu University followed by the University of the Free State, the University of Pretoria, UNISA, University of Johannesburg, Durban University of Technology, Tshwane University of Technology and North-West University. There were also a higher number of respondents that completed their Grade 12 certificate as well as those that enrolled at colleges, The International Hotel School.

In terms of positions most of the respondents are employed in administrative positions such as researcher, followed by sector-specific functions. For instance, professional hunter, animal curator, international client liaison, domestic worker at lodge, general workers, managers and assistant managers. They have been working in these positions on average for 42 months (3.5 years). This may be due to COVID-19, as there has been some level of stagnation where less vacancies are available, and people are hesitant to move to another position during these difficult economic times. When searching for information related to the sub-sector they mostly consult either the Internet or hear it from friends and family.

6.4.2 Knowledge and skills important to the workplace

a. Importance of aspects related to conducting one's work

Table 6.6 summarises the importance of certain aspects related to conducting ones' work.

Table 6.6: Importance of certain aspects related to conducting ones' work

Aspects	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
To have the relevant qualification and training	3.85%	13.46%	21.15%	23.08%	38.46%	3.79
To have practical experience before commencing	1.92%	9.62%	28.85%	40.38%	19.23%	3.65
To have a mentor	-	5.77%	15.38%	55.77%	23.08%	3.96
To up-skill yourself	1.89%	1.89%	7.55%	45.28%	43.40%	**4.26**
Sufficient resources	-	-	21.15%	36.54%	42.31%	**4.21**

The importance of upskilling is evident from the table (4.26) as well as having sufficient resources to conduct the work (4.21). Still important, but least important for this list having practical experience before commencing with work yielded a 3.65 value.

b. Importance of skills related to effective work

Table 6.7 summarises the importance of skills to effective work.

Table 6.7: Importance of skills related to effective work

Skills	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Customer service skills	1.92%	1.92%	21.15%	30.77%	44.23%	4.14
Networking skills	-	7.69%	32.69%	40.38%	19.23%	3.71
Verbal communication skills	-	1.92%	11.54%	42.31%	44.23%	**4.29**
Written communication skills	1.92%	5.77%	30.77%	32.69%	28.85%	3.81
Flexibility skills	-	3.85%	34.62%	32.69%	28.85%	3.87
Organisation skills	1.92%	-	25.00%	32.69%	40.38%	4.10
Language skills	-	3.85%	34.62%	34.62%	26.92%	3.85
Commitment	-	1.89%	22.64%	32.08%	43.40%	**4.17**
Can-do attitude	-	-	17.65%	47.06%	35.29%	**4.18**
Multi-tasking skills	-	-	22.64%	50.94%	26.42%	4.04
Cultural awareness	3.85%	15.38%	46.15%	26.92%	7.69%	3.19
Technology skills	-	11.54%	44.23%	23.08%	21.15%	3.54
Empathy and emotional intelligence	3.85%	9.62%	32.69%	38.46%	15.38%	3.52
Teamwork	-	3.77%	13.21%	39.62%	43.40%	**4.23**
Stress management	-	21.15%	21.15%	26.92%	30.77%	3.67
Time management	-	1.92%	34.62%	19.23%	44.23%	4.06
Problem-solving	-	1.92%	15.38%	44.23%	38.46%	**4.19**
Listening skills	-	5.77%	26.92%	332.69%	34.62%	3.96
Digital skills	7.69%	5.77%	38.46%	36.46%	11.54%	3.39

From the skills list it was clear that verbal communication skills were rated highly (4.29), followed by teamwork skills (4.23), problem solving skills (4.19), can-do attitude (4.18) and commitment (4.17). The least important skills in the view of the respondents were digital skills (3.39) and cultural awareness skills (3.19).

c. Importance of certain characteristics in doing ones' work effectively

Table 6.8 summarises the important personal characteristics identified.

Table 6.8: The importance of personal characteristics

Skills	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Responsible	-	1.96%	3.92%	47.06%	47.06%	**4.39**
Enthusiastic	-	-	24.00%	44.00%	32.00%	4.08
Dedicated	1.92%	-	19.23%	47.08%	30.77%	4.06
Precise	-	-	35.92%	39.22%	25.49%	3.90
Creative	-	9.80%	39.22%	41.18%	9.80%	3.51
Innovative	-	3.92%	50.98%	31.37%	13.73%	3.55

Independent	-	7.84%	45.10%	25.49%	21.57%	3.61
Sensitive	15.69%	21.57%	45.10%	17.65%	-	2.65
Professional	-	3.92%	23.53%	25.49%	47.06%	**4.16**

On a personal note, respondents indicated the importance of being responsible (4.39) and professional (4.16). The least important skills were listed as being sensitive (2.65).

6.3.1.3 The new world of work in the conservation sub-sector: Changes in the workplace because of COVID-19

Figure 6.9: Wordcloud for changes in the workplace because of COVID-19

It is evident from the Wordcloud (Figure 6.9) related to changes in the workplace that the word change (12 counts), represents the highest counts. Respondents thus recognise the changes that took place due to COVID-19. Respondents indicate the following as changes:

- Business is very slow and several businesses closed
- Customers changed and customers were lost
- Significant financial constraints, income loss and salary reductions
- Vacancies are scarce
- Job losses
- The workload increased and is inconsistent
- Technology is now more important than ever

6.3.1.4 Development of jobs in this sub-sector in the next few years

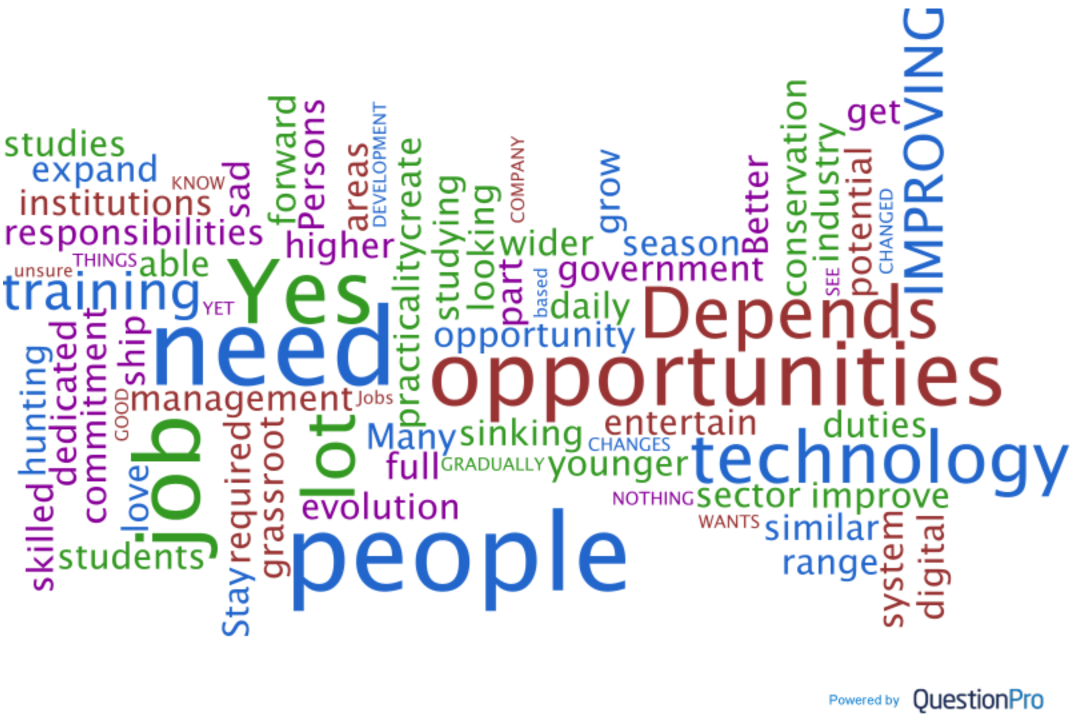


Figure 6.10: Wordcloud for the development of jobs in this sub-sector

The Wordcloud (Figure 6.10) indicated that the word need yielded 6 counts and the word people yielded 6 counts. Respondents indicated that jobs will develop in the following lines:

- Depends on the commitment from industry and government- need to create opportunities
- Need for more skilled people
- Many opportunities for younger people who love technology
- Better training, more conservation areas
- More practicality in the grassroot system
- I see a lot of things being changes by technology

6.2.1.5 Development of new jobs in the conservation sub-sector

Figure 6.11: Wordcloud for the development of new jobs in this sub-sector

Respondents (Figure 6.11) mentioned 12 times the word yes which was followed by jobs with 6 counts. Those that indicated positive respondents identified the following related to new jobs:

- Jobs where one is skilled in various areas. Cannot focus on one area of expertise.
- Social media
- Marketing
- The movement from local to international clientele
- Management and ability to think ahead
- Conservation covers many different job titles, and these jobs will always be important if we want to preserve and conserve our natural wildlife and heritage

6.3.1.6 Long-term employment and opportunities available in the conservation sub-sector

Figure 6.12: Opportunities available in the sub-sector and long-term employment

On a positive note, the word yes yielded 26 counts and 13 counts (Figure 6.12) for the word opportunity indicating that the respondents want to work in this sub-sector over the long term.

For those that indicated yes, the following views and opportunities were identified:

- Opportunities are, however limited
- Too many opportunities to list
- There are opportunities, but you need to know the right people
- With the correct motivation from management
- Research, training, and consulting opportunities
- Field ranger, field officer opportunities
- Guide, environmental monitor, nature conservation mentor, nature conservationist, reserve manager, environmental educator, general worker and administrator

For those that indicated not, the following reasons were given:

- Opportunities are scarce and if you are not qualified and don't have experience then you will battle to find work.
- Opportunities are limited

- No job security
- Low pay

Overall, respondents gave a positive response in terms of working in this sub-sector but a number of respondents indicated that while opportunities may be available they are limited and may be inhibited by factors such as no job security and low wages.

6.3.1.7 Aspects to improve in the workplace on a personal level

Figure 6.13: Aspects to improve in the workplace on a personal level

There were 18 counts for the word yes, indicating that there are some aspects that employees want to improve on a personal level (Figure 6.13).

The respondents indicated a need to improve the following aspects:

- Self-improvement through courses or training so that I can have the skills
- More management training and opportunities
- Better salary
- Salaries for the type of work done in conversation need to be increased
- People skills of other's in the office environment to one another
- More independence in decision making
- Communication skills

6.3.2 Employer responses

The quantitative research results are focused on the questionnaires distributed to employers in the conservation sub-sector.

6.3.2.1 Employer profile

Table 6.9 summarises the employer profile.

Table 6.9: Employer profile

Employer demographic characteristic			Demographic characteristic	
Age	**Percentage**		**Citizen**	**Percentage**
18-24	0.00%		South African	85.71%
25-34	0.00%		Foreign national residing in South Africa	14.29%
35-44	0.00%		**Race**	
45-54	85.71%		Black African	14.29%
55+	14.29%		White	85.71%
Gender	**Percentage**		Coloured	0.00%
Female	57%		Indian/Asian	0.00%
Male	43%		**Any form of disability**	
Did not say	0%		No	100.00%
Highest qualification			Yes	0.00%
Non-formal education	0.00%		**Monthly income**	
General Education (High School)	0.00%		Single (never married)	0.00%
Certificate	0.00%		Married	85.71%
Tertiary Diploma	57.14%		Domestic partnership	0.00%
Bachelor's Degree	28.57%		Widowed	14.29%
Postgraduate Degree	14.29%		Divorced	0.00%
Province			Separated	0.00%
Limpopo	0.00%		**Platform used to obtain information about the sub-sector**	
Free State	16.67%		Television	9.09%
North-West	16.67%		Print media (newspaper/magazine)	9.09%
Northern Cape	0.00%		The internet	22.73%
Western Cape	33.33%		e-Word-of-mouth (Websites, Facebook, Twitter, Instagram)	22.73%
Eastern Cape	16.67%		Word-of-mouth (friends, work colleagues)	22.73%
Gauteng	0.00%		Travel/trade shows	13.64%
Mpumalanga	16.67%		Do not receive any	9.09%
KwaZulu-Natal	0.00%			

From the employer profile (Table 6.9) it was evident that respondents were mostly white (85.71%), South African (85.71%) females (57%) and were aged between 45 and 54 years of age (85.71%). Most employers indicated possessing a Tertiary Diploma as their highest qualification (57.14%) and were based in the Western Cape (33.33%), Free State (16.67%), North-West (16.67%) and Eastern Cape

(16.67%) provinces respectively. In terms of those with qualifications, the most cited institutions included Technicon Pretoria, University of the Free State, Rhodes University, Technicon SA, University of the Free State and Port Elizabeth Technicon. In terms of positions, most of the respondents are owners, followed by those employed in managerial positions. One respondent was a skills development facilitator. Most have been working in these positions and in business on average for more 2 to 3 years. When searching for information related to the sub-sector, they primarily consult the Internet, e-Word-of-mouth and Word-of-mouth.

6.3.2.2 Business Profile

Table 6.10 summarises the employer business profile.

Table 6.10: Business profile

Business characteristics	
Annual turnover of your business in 2021	**Percentage**
R500 000	50.00%
R1.5 million	16.67%
R3 million	16.67%
+R3 million	16.67%
Annual turnover of your business in 2022	**Percentage**
R500 000	13.33%
R1.5 million	40.00%
R3 million	13.33%
+R3 million	33.33%
Business Size (by Employees)	**Percentage**
Small: 0 - 49	85.71%
Medium: 50-149	14.29%
Large:150+	0.00%
Participation in CATHSSETA initiatives	
Yes	14.29%
No	85.71%

Most of the businesses surveyed (Table 6.10) reported turnover of R500 000 in 2021 (50%), while the majority (40%) reported an annual turnover of R1.5 million in 2022, respectively, possibly indicating an increasing trend post-the-crisis. Employers were mostly small businesses by employee numbers (85.71%), with a significant proportion of them not (85.71%) participating in any CATHSSETA initiatives.

6.3.2.3 Knowledge and skills important to the employers in the workplace

a. The importance of certain aspects related to conducting ones' work

Table 6.11 summarises the importance of certain aspects related to skills expected by employers.

Table 6.11: Importance of certain aspects related to conducting one's work

Aspects	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Mean value
Customer service skills	-	-	14.29%	28.57%	57.14%	4.43
Networking skills	-	14.29%	14.29%	28.57%	42.86%	4.00
Verbal communication skills	-	-	-	28.57%	71.43%	4.71
Written communication skills	-	-	-	14.29%	85.71%	**4.86**
Flexibility skills	-	-	14.29%	28.57%	57.14%	4.43
Organisation skills	-	-	-	57.14%	42.86%	4.43
Language skills	-	-	-	57.14%	42.86%	4.43
Commitment	-	-	-	-	100%	**5.00**
Can-do attitude	-	-	-	14.29%	85.71%	**4.86**
Multi-tasking skills	-	-	14.29%	28.57%	57.14%	4.43
Cultural awareness	14.29%	14.29%	14.29%	42.86%	14.29%	3.29
Technology skills	-	-	14.29%	42.86%	42.86%	4.29
Empathy & emotional intelligence	-	-	14.29%	42.86%	42.86%	4.29
Teamwork	-	-	14.29%	28.57%	57.14%	4.43
Stress management	14.29%	14.29%	14.29%	42.86%	14.29%	4.29
Time management	-	-	14.29%	42.86%	42.86%	4.57
Problem-solving	-	-	14.29%	42.86%	42.86%	**5.00**
Listening skills	-	-	14.29%	28.57%	57.14%	4.43
Digital skills	-	-	42.86%	-	57.14%	4.14

Table 6.11 indicates the importance of commitment and problem-solving is evident from the table ($\bar{x}$=5.00), as well as written communication skills and a can-do attitude ($\bar{x}$=4.86). Still important, but least important for this list is cultural awareness which yielded a mean value of 3.29.

b. Most important consideration when employing someone

Figure 6.14: Wordcloud for important consideration when employing someone

It is evident from the Wordcloud (Figure 6.14) related to employers' considerations that required ability are the most prevalent consideration (2 counts), followed by attitude (1 count), as well as communication skills (1 count) and ethics (1 count). Respondents thus consider the following:

- Great attitude, skills, friendliness, communication, flexibility
- Reliability
- Empathy for nature
- Willingness to learn
- Their work ethic and trainability

It is evident that soft-skills are critical to employers in the conservation sector, more so are personality traits such as good attitude, empathy and reliability.

6.3.2.4 Business changes due to COVID-19

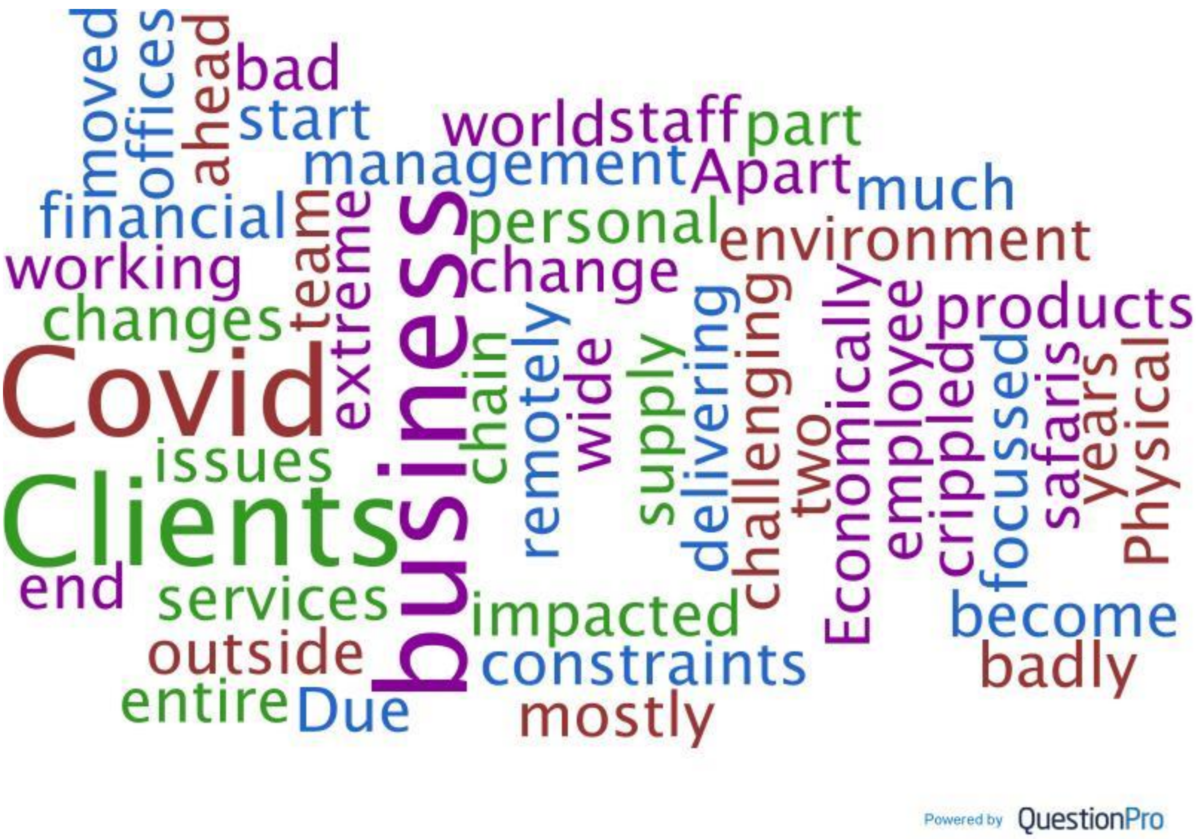


Figure 6.15: Wordcloud for changes in the workplace because of COVID-19

It is evident from the Wordcloud (Figure 6.15) related to changes in the workplace that COVID-19 affected businesses (2 counts) and clients (2 counts) which represent the highest counts. Respondents thus recognise the changes that took place due to COVID-19. Respondents indicate the following as changes:

- Clients had moved their safaris two years ahead
- Our entire team changes, so we had to start over
- Badly impacted
- Covid has crippled the business Economically because our services
- All staff are working remotely in their personal offices
- Apart from extreme financial constraints, the business did not change much

The pandemic instigated changes in the conservation sector. The sector was adversely affected, particularly due to financial constraints and dips in demand.

6.3.2.5 Occupations/jobs evolving in your sector. New types of occupations/jobs developing in this sector in the next few years

Figure 6.16: Wordcloud for the occupation evolution in the sub-sector

The sector concedes (Figure 6.16) the evolution of occupations in the sector, the word yes (3 count) had the highest count. Respondents indicated the following:

- No
- Yes, in the conservation sector there will be new opportunities

- we need to connect better with the international financial world
- In future I foresee qualified tanning technicians becoming part of every taxidermy business

There is a keen sense that the evolution of the conservation sector, like other sectors is predicated on the assimilation of new opportunities opening in the sector. For instance, for qualified technicians in some roles.

6.3.2.6 The future of the conservation sector in South Africa

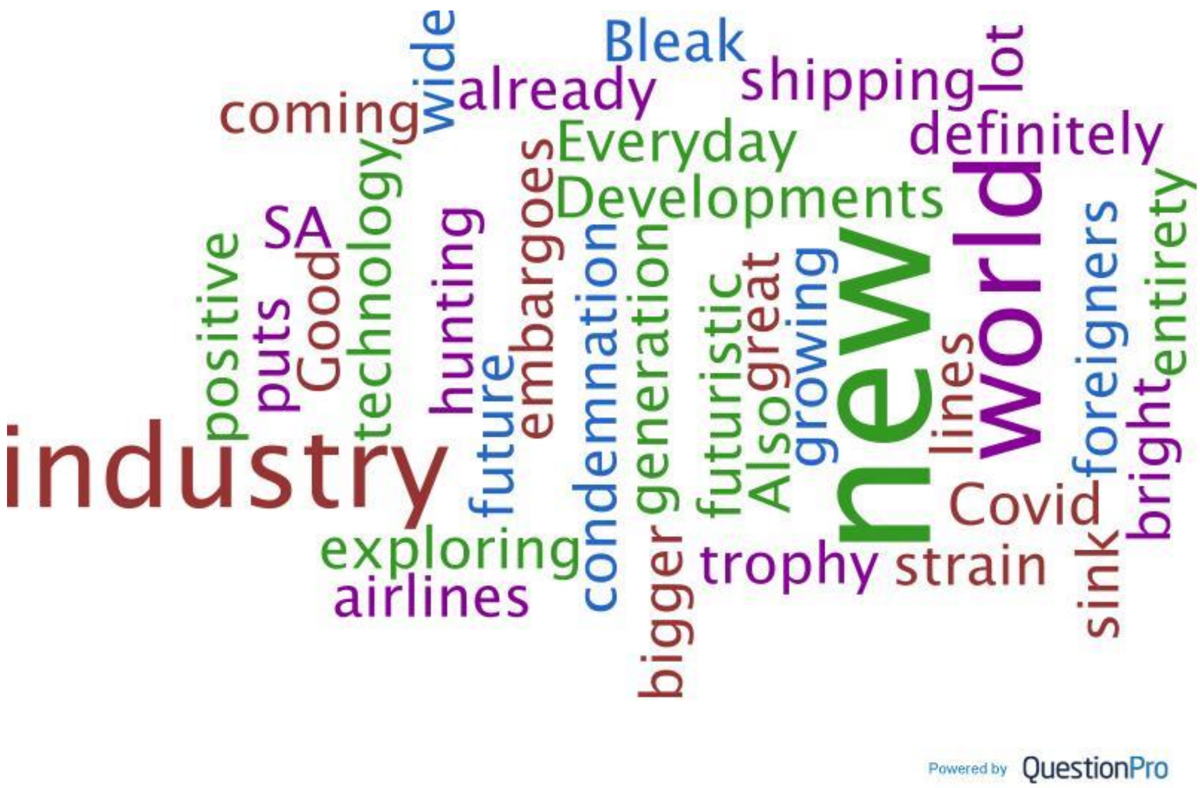


Figure 6.17: Wordcloud for the future of the conservation sector in South Africa

Respondents indicated (Figure 6.17) some mixed views. The word new had the highest count (3 counts) possibly referring to new opportunities. Industry and world have 2 counts each, while airlines (1 count) also was indicated in the future of the conservation sector. Respondents identified the following with reference to the future of the sector:

- More foreigners coming to SA
- Everyday its growing bigger
- Very positive
- Not great

- With new technology, New futuristic Developments and the new generation, that are exploring the world after Covid the future is definitely bright.
- Good
- Bleak - the worldwide condemnation of trophy hunting can sink this industry in it's entirety. Also embargoes of shipping lines and airlines already puts a lot of strain on the industry.

Respondents are mixed about the future of the conservation sector. Focus being on international tourism and positive growth facilitated by technology. Negative outlooks appear to be based on policy issues such as embargoes and international logistics.

6.3.2.7 Scope of business

Figure 6.18: Wordcloud for the scope of business

Key words extrapolated (Figure 6.18) suggest respondents were in tourism-oriented conservation, with research (2 counts), bio diversity (1 count) and conservation (1 count).More specific scope of business response was a follows,

- Hunting
- Botanical garden
- Conservation focussed, rehabilitation, research.
- Research to conserve marine biodiversity
- Accredited Tourist Guide Service Provider, Training Nature and Culture Guides NQF Level 2
- Drafting of Ecological Management plans for introduction of TOPS Species
- Taxidermy

Overall, respondents and their scope of business represent the broad spectrum of South Africa's conservation sector.

6.3.2.8 Participation in CATHSSETA initiatives

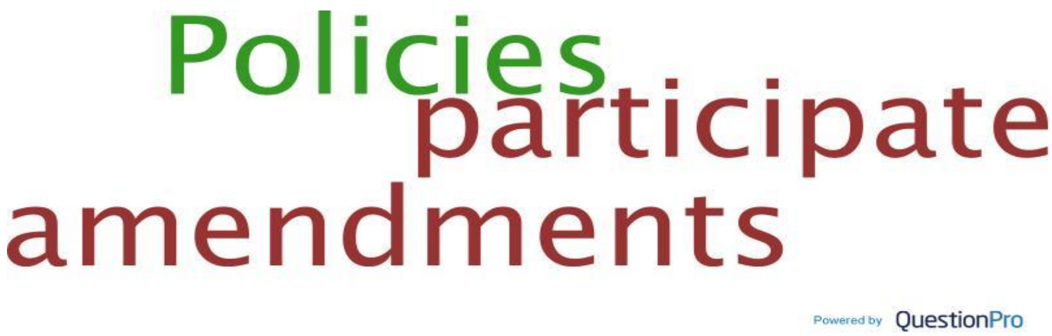


Figure 6.19: Wordcloud for the participation in CATHSSETA initiatives

The words amendments (1 count), participate (1 count) and policies (1 count) indicate extent of participation of respondents in CATHSSETA initiatives as employers (Figure 6.19). The respondents indicated the following aspects:

- We do participate in the amendments of policies

Some respondents indicate that they are part of policymaking in some of CATHSSETA initiatives.

6.3.2.9 Involvement in discussions related to policies

Figure 6.20: Wordcloud for the involvement in sector related to policies

Most respondents (Figure 6.20) indicated some participation in sector policy formulation processes, meetings (2 count), provide (2 count), attend (1 count) and chairman (1 count). Respondents indicated that they are:

- Involved through WRSA membership.
- We provide data to government. We provide expert opinions. We engage with media
- I do attend the meetings
- Chairman of our wildlife committee. Get invited to meetings with DEA, SANBI, DEDEAT

Respondents were involved in policy formulation indicated that they do so mainly through their direct involvement in boards and membership of associations.

6.3.3.10 Sector organisations and association membership

Figure 6.21: Wordcloud of sector organisations and association membership

The prevalent words from the Wordcloud (Figure 6.21) are member (6 count). Individual responses suggest membership of established South African associations, as respondents indicated:

- Garden Route Botanical Garden Botsco
- WRSA
- CATHSETTA
- SACNASP member EAPASA applicant SAWMA member GSSA member
- SATTA - member, PHASA- member

Most of the respondents indicated being a part of South African associations.

6.3.3.11 Additional thoughts

Figure 6.22: Wordcloud of Additional thoughts of respondents

When solicited for any additional thoughts (Figure 6.22), the Wordcloud indicates words such as Africa (2 counts), conservation (2 counts) and natural (2 counts) as sector references. Some key responses however included:

- Employing skilled workers
- More support needed for training
- Conservation must be a 20+year plan.
- Preserve Nature is to create abundant wealth for the generation to come
- Over regulation will kill this industry
- Schools need to produce graduated that is employable

Respondents identify the need to employ employable, skilled individuals, and upskilling through training. Conservation is also viewed as a sustainable, long-term initiative, that is susceptible to industry regulation.

6.4 DISCUSSION OF THE RESULTS

The results of the interviews and surveys were captured in the previous section. In the following section attention is given to the integrated discussion of the results from the different stakeholders based on the themes identified in the different sections. The interview guides and questionnaires differed between the stakeholder groups, thus where there are open spaces in the tables the information was not requested through the interviews or survey questionnaires.

Table 6.12: The conservation sub-sector - Themes related to the understanding the status of the conservation sub-sector

EMPLOYER VOICE		
Changes in the sector	**Economic performance of the sector**	**Challenges in growing the sector**
• An elevated appreciation of nature • The importance of the South African market in conservation • Restructuring of businesses and new business models • Financial challenges and constraints	• Effect of limited funding • Dependence on external organisations and people • The importance of tourism Government processes and structures.	• Finding competent future employees • Government processes and activities • Inability to address criminality Lack of coordination between stakeholders and external challenges.

It was evident that COVID-19 brought significant changes to the conservation sub-sector. On a negative note, from an employer point of view, it was necessary to rethink the current business models and work in more effective and efficient ways. Unfortunately, that lead to re-shuffling of staff, salary reductions and job losses. This was mainly caused by financial challenges and constraints, but the sector indicated that they would continue to work according to the new business model. There were also a number of businesses closing due to a lack of income. During COVID-19 conservation was mainly an expense and not an income. It was also evident that conservation had to continue despite the effect of COVID-19, but significant challenges were experienced in this regard with a decrease in funding for conservation and less people visiting these sites.

On a positive note, the businesses realised the importance of the South Africa market to support conservation. People could not travel abroad which led to an increase of South Africans visiting conservation areas when the borders opened. This is an opportunity that should be exploited in the future, since the domestic market plays an important role in the sustainability of conservation efforts, especially with a decrease in funding to conservation. There is also a deeper appreciation for nature amongst residents which can be due to the lockdown effect. After borders opened people wanted to be in nature and open spaces – again this is also an opportunity to exploit in the future.

Employees indicated the effect of limited funding in relation to conservation being an expensive activity. The economic performance of this sector decreased significantly, and many businesses utilised their reserved funding to survive the pandemic. In many cases support for conservation from organisations and individuals decreased which led to the realisation that other means of income are important. Conservation businesses delivered conservation services to other business that generated income. The dependence on tourism was also realised but it was indicated that tourism and conservation need to assist each other in creating higher levels of economic performance. Tourism creates income for conservation and conservation provides a sustainable product for tourists to enjoy. The processes and structures of government were indicated as a hindering factor in economic growth the lengthy and time-consuming tender and procurement strategies.

Taking the conservation forward it will be important to appoint the right employees but currently it is a challenge to find competent employees with the gith qualification and attitude to work in the sector. The sector has less trust in the government due to the inability of the authorities to address criminality and the cumbersome processes that are relevant to the sector. External aspects such as loadshedding, poor maintenance of infrastructure, less funding for conservation influence the work of these organisations negatively. Although stakeholder management is addressed by government it was emphasised that the lack of coordination lead to additional challenges. It was clear that the relevant role players should carve a more effective growth path for the sector.

Questions related to the education and training environment for the conservation sub-sector are analysed in the following table by focusing on the themes identified during the interviews.

Table 6.13: Themes related to education and training related to the conservation sub-sector

EMPLOYER VOICE	EMPLOYEE VOICE	GOVERNMENT AND QUASI-GOVERNMENT VOICE	ACADEMIC VOICE
			Changes in the educational landscape
			• Changing learner/student • Changing teaching landscape • Changing external landscape.
Types of qualifications	**Qualifications and training and appropriateness of these**	**Qualifications**	**Qualifications**
• Higher level qualifications • Lower-level positions • No qualifications but experience and practical courses.	• Higher level of qualifications • Multi-disciplinary qualifications and skills • Value of practical experience.	• Accredited training • Capacity building training • Internships are supported	• Higher level qualifications with • Conservation related content • Tourism related content • General content
Skills	**Skills**	**Skills**	**Skills**
• Communication • Problem-solving • People skills • Soft skills • Technology	• Multi-skilling • Technical skills • Communication skills • Ecology management • Soft skills • Language skills • Conservation specific and general skills • Continuous learning and experience	• Analytical skills • Conflict resolution • Problem-solving • Public speaking • Stakeholder management • Negotiations • Conservation related skills	• People skills • Problem-solving • Critical thinking • Adaptability
Up-skilling	**Up-skilling**		**Curriculum changes**

• Importance of continuous upskilling • The use of external and internal upskilling programmes • Creating in-house career opportunities.	• Inhouse up-skilling • External up-skilling		• Re-curriculation • Project management • Engagement with industry • Indigenous knowledge • Intercultural skills The role of DHET in programme development: • a place and a need for the DHET process • high levels of frustration

For all the stakeholders the importance and need for higher level qualifications was evident. There are places for lower-level positions where the personality of the potential employee is more important than the qualification but, in most cases, the higher-level qualification is better. It was interesting that most of the stakeholders recommended a more multi-disciplinary approach where the training is not just about conservation but also included content related to tourism and general management aspects. The value of practical experience and experiential training should not be underestimated. This industry thus stives to excellence through higher level qualifications and practical experience. No significant changes were indicated for the qualifications besides the inclusion of tourism and management content.

All stakeholders indicated the importance of people skills, communication skills and a variety of other soft skills. During COVID-19 many soft skills training did not happen due to the online teaching environment that was applied under difficult circumstances. There is however a distinction between these skills and conservation related skills which is more content driven. The value of continuous learning and practical experience was also noted in the discussions related to skills. All stakeholders support up-skilling but most of them focus on inhouse upskilling. In the cases where upskilling was not supported it was due to the up-skilled employee leaving the organisation shortly after the training has been completed – thus loss of employee investment. Although inhouse upskilling is good one should be careful not to train employees to work only at one business, one should train to enlarge the world of work for the employees. These courses can however be adapted to fit the needs of the employees. In the case of academic institutions major frustrations were experienced with the DHET process which is time-consuming. By the time a new or adapted academic programme is approved by DHET the content needs to change again. Most academic institutions are in the process of re-curriculation where higher levels of industry engagement are taking place and changes can be made to the programmes. It is important to understand the workplace and the factors influencing the workplace. In the following table (Table 6.14) the themes related to the workplace are analysed.

Table 6.14: Themes related to an understanding the workplace

EMPLOYER VOICE	EMPLOYEE VOICE	GOVERNMENT AND QUASI-GOVERNMENT VOICE	ACADEMIC VOICE
		Changes in the labour landscape	
		• A changing workforce and workplace • A changing conservation landscape	
		Towards professionalisation	**Towards professionalisation**
		• Support for high levels of professionalisation	• Support for professionalisation of certain occupations
Types of occupations in the conservation sub-sector	**Changes in occupations in the conservation sub-sector**	**Changes in occupations in the conservation sub-sector**	**Changes in occupations in the conservation sub-sector**
• Occupations remained the same, but a different skills set is needed • Opportunities for different skill levels • A variety of occupations.	• Job losses • A changing work environment.	• Stakeholder engagement • Integration. • Conservation vs sustainability	• Same occupations but a more integrated skill set • Importance of technology • More entrepreneurs
Readiness of students/learners to enter the workplace		**Attractiveness of the workplace**	**Attractiveness of the workplace**
• Not ready to enter the sector • Getting future employees ready to enter the sector • Being ready to enter the sector		• Unattractiveness • Unrealistic expectations	• Inhibiting factors • Factors increasing the attractiveness of the sector
Challenges in the labour market		**Challenges in the labour market**	**Challenges in the labour market**

• Renumeration expectations • Finding the right employees.		• Labour pressure • Limited resources to address for example poaching.	• Economic challenges in the industry • Relevance of qualifications.
		Changes in the labour profile	**Changes in labour profile**
		• Younger workforce • Decrease in hands-on skills • Technology is critical • Stronger black entrants to the sector	• The influence of government • The ideal conservation sub-sector employee.
Future of work in the conservation sub-sector	**Future of work in the conservation sub-sector**	**Future of work in the conservation sub-sector**	**Future of work in the conservation sub-sector**
• Sustainable approaches • People as critical stakeholders	• Sustainable management • Remaining relevant	• Integration of tourism and conservation	• Interdependence between tourism and conservation

After the discussions with the stakeholders, it was realised that this sector is in a change mode after COVID-19. Participants from the government indicated that the workforce is changing as well as the conservation landscape. The workforce is younger, with more women being employed in conservation. Poor salaries in relation to the increased cost of living were highlighted. In the conservation landscape it was clear that communities are very important and more integrated efforts should be applied to include this stakeholder in the development of conservation. The decrease in funding for conservation is alarming and stakeholders need to be creative to secure income. Overall, the importance of stakeholder management was discussed.

Professionalisation of selected occupations in the conservation sub-sectors was supported by government and academic employees – mainly higher-level positions related to in-depth conservation knowledge and skills. It was interesting to discover that stakeholders did not indicate any new occupations but changes to what certain occupations now require – this will require a re-evaluation of position specifications which should be share with academic institutions. There is however a place in conservation for low, medium and highly skilled individuals. The importance of technology skills and working with community members were highlighted. The interplay between conservation and sustainability was mentioned as a drawback and it was recommended to move away from the use of the term “conservation” to using the term “sustainability”.

The sector felt that students and learners are not ready to enter the workplace – this is mainly due to limited practical experience and inadequate content in their opinion. On the other hand, the workplace was indicated as unattractive due to low salaries and positions available in rural areas. The labour market has changed in the sense that it is a challenge to find the right employees (high turnover) and the economic challenges of the sector led to less people employed. There is significant pressure on the sector to increase salaries in a sector that is financially under its own pressure. The changes in the labour profile were noted earlier but it is however significant to note that in many cases people enter the industry without any form of qualification and then attend inhouse training. These programmes are in many cases not accredited and career limiting as the person is trained for one organisation. People thus get stuck at a specific organisation and moving upwards without any qualifications is difficult. On the other hand, it seems that with the poor salaries the conservation sub-sector cannot afford people with higher qualifications in many cases.

Moving forward the interdependence of tourism and conservation should be noted and qualifications and training programmes should be adapted to this need. The integration of stakeholders in conservation efforts become more important. Overall people are positive about the future of the conservation sub-sector.

Table 6.15: Theme related to general aspects

EMPLOYER VOICE	EMPLOYEE VOICE	GOVERNMENT AND QUASI-GOVERNMENT VOICE	ACADEMIC VOICE
Knowledge of and involvement in CATHSSETA opportunities			
• No to limited knowledge and involvement • Current and future involvement.			
Learnership and internship programme			
• Supportive of learnerships and internships • Unsupportive of learnerships and internships.			
Sector Involvement			
• *Participation in policy and strategy review:* • Involvement through organisations • No involvement • ***Membership of organisations*** • National and international participation • Local participation in a variety of organisations.			
Other comments	**Other comments**	**Other comments**	**Other comments**

• Limited investment • Sustainable utilisation • Lack of leadership • Interplay between conservation and tourism	• Stakeholder engagement • Education and training • Interplay between high levels of unemployment; people that do not want to work in the sector and the number of unskilled workers in the sector.	• Monitoring challenges • Funding challenges	• Small businesses growth • Conservation awareness

General aspects related to the conservation sub-sector are discussed through the table below which captures the themes identified in the results section. From the interactions it was clear that there is no to limited knowledge and involvement in the CATHSSETA initiatives but there is a willingness to become involved if stakeholders receive information. It might be that the conservation sub-sector did not realise their placement with CATHSSETA. In general, most of the participants supports internship programmes and see that value of that to both the organisation and the students. The participants are highly involved in local as well as international organisations and contribute to policy reviews and other activities as much as they can. On a concluding note, it was noted that the participants advocated for higher levels of stakeholder engagement, addressing the financial dilemma and the integration of tourism and conservations.

6.4 RECOMMENDATIONS RELATED TO THE RESULTS

The value of the EMM research lies in the integrated views of different stakeholders addressing the questions from their context and perspectives.

- From a marketing perspective is it recommended that both private and public conservation products capitalise on consumers' need to enjoy nature. There is a space for conservation products to contribute to the economy of South Africa which also shows the development opportunities of this sector (new products, job opportunities). It is now more important than ever to create awareness amongst the youth of the importance of conservation.
- The results indicated a lack of coordination of various aspects between stakeholders. This is not a new challenge, but the need still exists to gather stakeholders and integrate efforts towards the same goals – it is recommended that provincial workshops (smaller groups) with a specific focus is held to work towards solutions for poor coordination.
- The interdependence between tourism and conservation was mentioned several times in the results. Given the decreasing financial contribution of the government to conservation tourism can be utilised to create income for conservation areas. The Kruger National Park is one of the best examples of a successful interdependence. Selected conservation areas should be evaluated to determine its conservation and tourism value after which strategies should be developed and implemented to improve the integration of tourism and conservation – aiding the financial challenges.
- The discrepancy between the industry stating that students/learners are not ready to enter the sector and the current academic offerings needs further attention. Closer cooperation is needed between the sector and academic institutions through workshops – with all the changes that happened in the sector it is now the right time to do this. New occupations that follow a more integrated approach could a solution moving forward – for example a conservation economist understands the world of conservation but also the economy and will be able to contribute to the development of more sustainable conservation areas. The same goes for the combination between conservation and tourism.
- Given the results related to employees the sector needs to evaluate potential employees according to a combination of qualifications/training, skills, personality and motivation to work in conservation. It seems that there is a mismatch between students/learners expectations of the workplace and the actual work they are doing. Experiential training and work placement can solve this challenge and more academic institutions should include this in their academic offerings.
- The need for soft-skills development was indicated especially because of the influence of the

pandemic. Online short courses can be developed and promoted for free for those entering conservation as a workplace.

- The importance of up-skilling should not be underestimated. Even though many organisations do inhouse upskilling it is recommended that the process should be formalised. This way completion of the course can benefit the employee when applying for another position. Unfortunately, many people complete inhouse courses but it does not move them up on the career ladder and the quality cannot be verified. Many people are thus stuck at a certain organisation and at a certain level.
- The frustrations with government processes should be addressed, for example permit systems. This creates difficulties for those in the conservation sub-sector to operate effectively. Processes should be streamlined, and technology can assist in making these processes easier.
- The financial dilemma of some of the conservation organisations is critical and it was worsened during and because of COVID-19. The levels of dependence on external parties and organisations to continue with conservation activities is worrisome and lobbying should be done with government to determine the way forward. Activities such as anti-poaching measures are expensive.
- This sector is currently not attractive to future employees due to salaries, unmet expectations and the location of many of the conservation areas. A salary review is needed to determine fairness in this regard. In most cases young people want to work in the city where they have easy access to what they need. One way to improve attractiveness is to create awareness of conservation as an employer at school level – people with a passion for nature should follow this career path.

SECTION 7: GOING GREEN: IMPLICATIONS FOR THE CONSERVATION, HOSPITALITY AND TOURISM AND TRAVEL SERVICES SECTOR SKILLS AND SUSTAINABILITY

7.1 INTRODUCTION

The socio-economic impact of climate change and environmental degradation have been a global concern for decades. As early as 2008, the impact of climate change of the labour market has been considered. The International Labour Organization (ILO), the United Nations Environmental Programme (UNEP), the International Organization of Employers (IOE) and the International Trade Union Confederation (ITUC) published a *Green Jobs Report* (2008). As a critical follow-up to this report, a very important study was carried out by the ILO (Strietska-Ilina, Hofmann, Durán Haro & Jeon, 2011) to investigate skill needs for greener economies.

7.1 IMPLICATIONS FOR THE CONSERVATION, HOSPITALITY AND TOURISM AND TRAVEL SERVICES SECTOR SKILLS AND SUSTAINABILITY

The following core green skills are identified and adapted based on a 21-Country Green Skills Project by the ILO (Strietska-Ilina et al., 2011:107):

- Strategic and leadership skills - to enable policy development and incentives development for greener T&T Services/Conservation /Hospitality sub-sector consumptive practices and activity.
- Adaptability and transferability skills - to facilitate the application of new green technologies and function more efficiently in their T&T Services/Conservation /Hospitality sub-sectors occupations.
- Environmental and sustainable awareness skills – to enable reflexive strategic and tactical planning in T&T Services/Conservation /Hospitality sub-sector suppliers.
- Coordination, management and business skills - to facilitate implementation of green initiatives and management in T&T Services/Conservation /Hospitality sub-sectors.
- Systems and risk analysis skills – to develop interpretation, monitoring and evaluation of green-oriented sector activity in T&T Services/Conservation /Hospitality sub-sectors.
- Entrepreneurial and innovation skills – identify and exploit green economy implementation opportunities in the T&T Services/Conservation /Hospitality sub-sectors.
- Communication, negotiation and conflict resolution skills - to discuss conflicting interests in complex T&T Services/Conservation /Hospitality sub-sector contexts.
- Marketing and consulting skills – to facilitate the promotion of greener T&T Services/Conservation /Hospitality sub-sector products and green solutions.
- Networking, IT and language skills - to perform complex green tasks in line with the global T&T Services/Conservation /Hospitality sub-sector markets.

In a post-COVID-19 environment, critical lessons can be drawn for the broader South African tourism multi-sector context. However, CATHSSETA must be cognisant that current economic growth and fiscal constraints have contributed to elevated unemployment levels in South Africa. This suggests that Green skills development in South Africa may not be fully funded and needs to be managed within the existing occupations to limit job-losses. Thus, the upskilling of labour, and skills transfer via on-the-job training will be significant. It is important to note the following (Strietska-Ilina et al., 2011:107):

- Skill shortages may be a constraint on the transition of the T&T Services/Conservation /Hospitality sub-sectors to a greener economy - in terms of preparing for some new occupations and the changing skill profile of occupations.
- There is a need to provide opportunities for acquiring new skills to those who are at risk of losing jobs in in the T&T Services/Conservation /Hospitality sub-sectors since these sectors are susceptible to the effects of climate change.
- Green skills in the T&T Services/Conservation /Hospitality sub-sectors require the development of innovative strategies and policies: (1) to proactively anticipate and address emerging skill needs; (2) adjust existing mechanisms; and (3) manage skills systems on a more ad hoc basis.
- Progressive green skills in the T&T Services/Conservation /Hospitality sub-sectors need policies to focus on: (1) equipping the youth entering the labour market and older mid-career workers with the ability to learn the skills required for adopting new technologies; (2) meeting new environmental regulations and shifting to renewable sources of energy; (3) emphasis on the core skills that enable workers to adapt to changing technologies.
- Green Skills systems aimed at skills development need to: (1) match training to the needs of the labour market; (2) enable entrepreneurial and firm adaptation to catalyse economic growth and resilience.
- A multi-stakeholder (government, quasi-government, private sector, associations) approach need to collaborate via labour market information systems to better predict skills requirements and skills development systems.

The impact of going green on the T&T Services/Conservation /Hospitality sub-sectors needs in-depth study. This preliminary review suggests a dual approach towards going-green and sustainably creating jobs which requires a bespoke hybrid approach. Therefore, further advanced research is recommended.

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ANNEXURES

ANNEXURE 1

QUALITATIVE MEASURING INSTRUMENTS

To: Potential Interview Participant

From: Prof E. Slabbert

Subject: **Informed consent to participate in a research study**

Research topic: **Sector Skills Analysis**

Dear research participant

The North-West University's (NWU) Tourism Research in Economic Environs and Society (TREES) research unit under the auspices of CATHSSETA is conducting a Sector Analysis to review the employer and employee profile of the Conservation/Hospitality/Tourism and Travel Services Sectors considering the changes in this sector over the last year. As part of the study, you have been identified as a potential key resource within the South African Conservation/Hospitality/Tourism and Travel Services Sectors. You are being invited to participate in our study as an interviewee. The relevant Scientific and Ethics Committee of the Faculty of Economic and Management Sciences (FEMS) at the NWU has approved the study and has therefore provided the following ethics clearance number: NWU-00552-23-A4.

The study aims to analyse the Conservation/Hospitality/Tourism and Travel Services Sectors to inform the Sector Skills Plan for these sectors. We are predominantly interested in some of the following areas:

- Identification and analysis of the key role players

- Determining each sectors' economic performance
- Determining and analysing the employer profile
- Anlaysing the labour market profile and
- Determining the factors affecting skills demand and supply.

You are being asked to participate in our study as your insights based on your experience and expertise would be extremely beneficial to the Conservation/Hospitality/ Tourism and Travel Services Sector.

Kindly take note of the following:

- Your participation in this research is entirely voluntarily, and you will receive no form of compensation for participating.
- In line with the Protection of Personal Information Act (POPIA), the researcher will not require any personal information that could re-identify any participants or organisation.
- The interview can be conducted in person or via an electronic platform such as Zoom.
- If through Zoom, a participant ID will be created (e.g. P-01) before the interview to be used by the participant in the Zoom name. The camera will be switched off during the interview to ensure anonymity and protect the participant's identity. Only the audio will be required to record the interview.
- If through a face-to-face interview no identification will be recorded.
- Responses from each individual will not be identifiable, as the results will be presented as a whole, and no individual results will be reported.
- All data obtained will be securely stored at the tourism research entity (TREES) at the NWU, with only the primary researchers and CATHSSETA having access to the data. The data will be stored for five years, in line with good research practice.
- The research results will be published as a chapter in my thesis and in the form of peer-reviewed academic publications and conference presentations.
- This interview should take approximately 30 to 45 minutes to complete.
- While it will be required that respondents answer each question, if you feel, at any time, that you want to withdraw the participation in this study, please feel free to do so without any fear of judgement.

Consent to participating in this study:

Please place a checkmark (✓) for each of the below statements to indicate consent:

	I confirm that I am above the age of 18 years.
	I voluntarily agree to participate in this research study, and I understand that I am participating voluntarily without being forced in any way.
	I am fully aware that I can withdraw my participation from this study at any point.
	I understand the purpose of this study.
	I give consent to be recorded (anonymously) via a Zoom call/face-to-face interaction.
	I understand that anonymity will always be maintained during the study.

For any further information, feel free to contact the researchers.

Principal Researcher:	Co- Researcher:
Prof Elmarie Slabbert	Dr Tafadzwa Matiza
elmarie.slabbert@nwu.ac.za	32552378@nwu.ac.za
Cell: 018 299 1980	Cell: 0798040687

Thank you kindly for your participation!

ACADEMICS: TERTIARY EDUCATION INSTITUTIONS

1. What is your current position at this academic institution, and how long have you been involved in teaching Hospitality related courses?
   (*May probe previous positions that may be relevant to higher education, such as research and/or industry*)

2. To what extent do you think the education landscape has changed or should change to keep the courses related to Hospitality as well as the current environment?
   (*Probe whether these are positive or negative or a mix of both*)

3. Which type of Hospitality sub-sector-related qualifications do you offer and what are the occupations linked to these qualifications?
   (*If available, the participant may provide an institutional prospectus summarizing this information*)

4. What skills do you think are needed to work in the Hospitality sub-sector that you are most familiar with?
   (*Probe for specific examples and motivation for the skills outlined*)

5. Are there any specific skills considered to be now more important than previously (pre-COVID) for this Hospitality sub-sector?
   (*Probe for the specific pandemic-related shifts supporting the changes in skills*)

6. Do you foresee any changes in occupations related to the Hospitality sub-sector?
   (*Probe for the changes and the potential factors influencing the changes)*

7. Post-pandemic, have you noticed any shifts in the labour profile related to the Hospitality sub-sector?
   (*Probe for specific examples that may aid in identifying specific changes and potential skills gaps)*

8. Do you think the Hospitality sub-sector is still attractive for learners and employees?
   (*Probe for the factors they consider attractive or not attractive depending on the response*)

9. What are the challenges currently related to the labour market in the Hospitality sub-sector?
   (*Probe for two or three specific challenges they consider most significant*)

10. To what extent is your work, such as the development of new programmes influenced by policies, rules and regulations of bodies such as the Department of Higher Education?

11. Please provide your opinion on the future of Hospitality as part of the South African tourism industry.

    (*Probe to motivate their response*)

12. What is your opinion on the level of professionalisation of certain occupations in the Hospitality sub-sector?

    (*Probe for whether there are any skills gaps or challenges that result in the level of professionalization of the occupations mentioned)*

13. Are there any other aspects that you consider as crucial in developing this sector as part of the tourism industry?

Thank you!

GOVERNMENT INSTITUTIONS:

1. What is your current position in this government department, and how long have you been involved in the administration of Conservation / Hospitality / Tourism and Travel Services related functions?
   (*Probe for level of involvement of the function in the response*)

2. To what extent do you think the labour landscape has changed or should change to keep the jobs/ occupations related to Conservation / Hospitality / Tourism and Travel Services relevant?
   (*Probe for potential reasons for the changes*)

3. Is your department involved in developing or accreditation qualifications, training or internships in the Conservation / Hospitality / Tourism and Travel Services sector?
   (*If yes probe the extent of involvement and relevance of the department. If no, do they believe their department should be a key stakeholder in any of the above*)

4. From your perspective as a government entity, which type of skills do you think are needed to work in the Conservation / Hospitality / Tourism and Travel Services sector?
   (*Probe for examples and motivation to response*)

5. Are there any specific skills you believe to be are now more important than before (pre-COVID-19) for this sector?
   (*Probe for motivations for the specific skills mentioned in response*)

6. Do you foresee any changes in occupations related to the Conservation / Hospitality / Tourism and Travel Services sector?
   (*Probe for elaboration of cited changes for the specific changes mentioned in response*)

7. Did you notice any shifts in the labour profile related to the Conservation / Hospitality / Tourism and Travel Services sector?
   (*Probe for elaboration of possible implications of these shifts)*

8. Do you think the Conservation / Hospitality / Tourism and Travel Services sector is still attractive for current learners and employees? Which factors will contribute to the attractiveness of this sector?

   (*Probe for elaboration of possible factors attracting or discouraging labour market entry*)

9. What are the challenges (if any) currently related to labour in Conservation / Hospitality / Tourism and Travel Services?

   (*Probe for elaboration of possible envisioned/perceived challenges*)

10. Please provide your opinion on the future of the Conservation / Hospitality / Tourism and Travel Services as part of the South African tourism industry.

    (*Probe for elaboration of possible critical success or failure factors dependent on the response)*

11. What is your opinion on the level of professionalisation of certain occupations in the Conservation / Hospitality / Tourism and Travel Services sector?

    (*Probe for whether there are any skills gaps or challenges that result in the level of professionalization of the occupations mentioned)*

12. Are there any other aspects that you consider important in developing the Conservation / Hospitality / Tourism and Travel Services sector as part of South Africa's broader tourism industry?

Thank you!

EMPLOYERS IN THE CONSERVATION / HOSPITALITY / TOURISM AND TRAVEL SERVICES SECTOR

As an employer, you form part of the Hospitality / Tourism and Travel Services Sector. Based on this association, please provide your opinion on the following questions:

1. Tell me more about the type of business that you operate/are employed at.

   (*Probe which sector: Conservation / Hospitality / Tourism and Travel Services sector they categorize themselves in*)

2. What is your current position at this business and how long have you been working in this position?

   (*May probe previous positions that may be relevant to personal skills development*)

3. COVID-19 has changed several aspects of the Conservation/Hospitality/Tourism and Travel Services sector. What would you consider to be major changes in the sector?

   (*Probe what has changed and what has generally remained the same*)

4. Please provide your view on the economic performance of the Conservation / Hospitality / Tourism and Travel Services sector and the factors influencing growth.

   (*Probe if economic performance is positive and growth is perceived, what the key growth factors are*)

5. What would you consider as the potential challenges in growing the Conservation / Hospitality / Tourism and Travel Services sector?

   (*Probe perceived current challenges and probe future perceived challenges*)

6. Labour market in the Conservation / Hospitality / Tourism and Travel Services sector:

   6.1 Which types of occupations/positions are relevant for the successful operation of your business?

   6.2 Which types of qualifications are important when you consider a new employee?

   6.3 Which skills are needed to work in the Conservation / Hospitality / Tourism and Travel Services sector? Please provide examples and motivation.

   6.4 Do you feel the students/learners you employ are ready to work effectively in this sector?

   6.5 Were there any changes in your business environment that required a new set/adapted set of skills needed by employees?

   6.6 What are the challenges that you experience in the current labour market?

6.7 Do you support up-skilling in your business and how do you provide for that?

6.8 Do you employ any people in learnerships or internships? How does this contribute to the growth of your business, and what are the benefits to the learners?

7. To what extent do you participate in the opportunities created by CATHSSETA?
8. To what extent are you actively involved in the sector's development regarding inputs to policies, development plans, workshops etc.
9. Are you an active member of any associations or organisations directly related to your sector? Please name the organisations and describe your participation.
10. What is your opinion about the future of work in the Conservation / Hospitality / Tourism and Travel Services sector?

    (*Probe for any future developments in skills, preferences and changing roles of stakeholders like CATHSSETA*)

11. Are there other aspects that you consider important in developing this sector as part of the tourism industry?

Thank you!

EMPLOYEES IN THE CONSERVATION / HOSPITALITY / TOURISM AND TRAVEL SERVICES SECTOR

As an employee, you form part of the Conservation / Hospitality / Tourism and Travel Services Sector. Based on your place of work, please provide your opinion on the following questions:

1. Tell me more about your position and what you do. How long have you been working in this position?

   (*May probe previous positions that may be relevant to personal skills development*)

2. What type of training or qualifications do you have?

   (*May probe vocational and informal qualifications)*

3. Do you feel that this qualification/training equipped you with the necessary skills and knowledge to do the work expected from you?

   (*May probe the potential link between qualifications and work readiness*)

4. If you can provide feedback to your training institution regarding the applicability of the qualification to the work you do in this sector, what would you recommend to them?

   (*Probe for positives and negatives for a balanced perspective*)

5. COVID-19 has changed several aspects of the Hospitality/Conservation/Tourism and Travel Services sectors and work. Have you experienced this in your work, or is it business as usual?

   (*Probe what has changed and what has generally remained the same*)

6. Which skills are critical in doing your work within the Conservation / Hospitality / Tourism and Travel Services?

   (*Probe whether the participant believes they possess the skills. If yes, do they need to be refreshed, or are they still relevant? If no, do they feel they need to gain those skills, and do they know where to get those skills*)

7. Are there any new skills you acquired or feel you need to acquire that will enable you to work more effectively within the Conservation / Hospitality / Tourism and Travel Services sector?

   (*Probe whether they know where to access resources such as funding, and information about the skills, or obtaining the qualification itself*)

8. Do you do any up-skilling in your work within the Conservation / Hospitality / Tourism and Travel Services sector?

(*Probe whether their employer facilitates this process. If yes, ask the respondent to describe employer processes in place. If no, probe whether they know where to access resources such as funding and information about the skills or obtaining the skills themselves*)

9. What is your opinion about the future of work within the Conservation / Hospitality / Tourism and Travel Services sector?
   (Probe whether they see themselves as part of that future)

10. Are there any other aspects that you consider important in developing the Conservation / Hospitality / Tourism and Travel Services sector as part of the broader tourism industry?

Thank you!

ANNEXURE 2

QUANTITATIVE MEASURING INSTRUMENTS

EMPLOYEE QUESTIONNAIRE

Dear respondent,

The North-West University's (NWU) Tourism Research in Economic Environs and Society (TREES) research unit under the auspices of CATHSSETA is conducting a Sector Analysis to review the employer and employee profile of the Conservation/Hospitality/ Tourism and Travel Services sub-sectors considering the changes in this sector over the last year. As part of the study, you have been identified as a potentially key resource within the South African Conservation/Hospitality/ Tourism and Travel Services sub-sectors and you are being invited to participate in our study as survey participant. The relevant Scientific and Ethics Committee of the Faculty of Economic and Management Sciences (FEMS) at the NWU has approved the study and has therefore provided the following ethics clearance number: N W U - 0 0 5 5 2 - 2 3 - A4.Thank you very much for your time and support. Please, if you have any questions contact: Prof Elmarie Slabbert on 083 321 6338.

Are you currently employed in the tourism sector?

1. Yes
2. No

In which sub-sector does your place of work operate?

1. Hospitality
2. Conservation
3. Tourism and Travel Services

How important are the following aspects in doing your work?

	Not at all important	Slightly important	Moderately important	Very important	Extremely important
To have the relevant qualification and training	❑	❑	❑	❑	❑
To have practical experience before commencing	❑	❑	❑	❑	❑
To have a mentor	❑	❑	❑	❑	❑
To up-skill yourself	❑	❑	❑	❑	❑

Sufficient resources	❑	❑	❑	❑	❑

Please rate the importance of the following skills in doing your work effectively...

	Not important	Somewhat important	Important	Very important	Extremely important
Customer service skills	❑	❑	❑	❑	❑
Networking skills	❑	❑	❑	❑	❑
Verbal communication skills	❑	❑	❑	❑	❑
Written communication skills	❑	❑	❑	❑	❑
Flexibility skills	❑	❑	❑	❑	❑
Organisation skills	❑	❑	❑	❑	❑
Language skills	❑	❑	❑	❑	❑
Commitment	❑	❑	❑	❑	❑
Can-do attitude	❑	❑	❑	❑	❑
Multi-tasking skills	❑	❑	❑	❑	❑
Cultural awareness	❑	❑	❑	❑	❑
Technology skills	❑	❑	❑	❑	❑
Empathy and emotional intelligence	❑	❑	❑	❑	❑
Teamwork	❑	❑	❑	❑	❑
Stress management	❑	❑	❑	❑	❑
Time management	❑	❑	❑	❑	❑
Problem-solving	❑	❑	❑	❑	❑
Listening skills	❑	❑	❑	❑	❑
Digital skills	❑	❑	❑	❑	❑

Please rate the importance of the following characteristics in doing your work effectively...

	Not important	Somewhat important	Important	Very important	Extremely important
Responsible	❑	❑	❑	❑	❑
Enthusiastic	❑	❑	❑	❑	❑
Dedicated	❑	❑	❑	❑	❑
Precise	❑	❑	❑	❑	❑
Creative	❑	❑	❑	❑	❑
Innovative	❑	❑	❑	❑	❑
Independent	❑	❑	❑	❑	❑
Sensitive	❑	❑	❑	❑	❑
Professional	❑	❑	❑	❑	❑

How did your world of work change/ or not change because of COVID-19?

Do you see yourself working in this sector over a longer term and what are the opportunities available in this sector? Please motivate your answer.

Are there any aspects of your work that you would want to improve? If so, please elaborate.

How do you see jobs evolve in this sector in the next few years?

Are there any new jobs you see becoming more important in this sector?

Which gender do you identify with?

In what age category are you?

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55+

How would you best describe yourself?

1. South African citizen
2. Foreign national residing in South Africa

Please indicate your country of origin

With which race group do you associate?

1. Coloured
2. Black African
3. White
4. Indian/Asian

What is your highest qualification?

1. Non-formal education

2. General Education (High School) Diploma
3. Certificate
4. Tertiary Diploma
5. Bachelor's Degree
6. Postgraduate Degree

Please indicate at which Tertiary Education or Establishment you studied for your highest qualification

Do you have any form of disability?

1. Yes
2. No

If yes, please provide more information

Which best describes your monthly income in relation to the average monthly gross income of [to be confirmed] in South Africa?

1. Much below-average income
2. Below average income
3. Same as average income
4. Above average income
5. Much above average income
6. Rather not say

In which province are you working?

1. Limpopo
2. Free State
3. North-West
4. Northern Cape
5. Western Cape

6. Eastern Cape
7. Gauteng
8. Mpumalanga
9. KwaZulu-Natal

In which position are you currently employed?

How long have you been employed in your current position? (In months)

Which platforms do you use to get information about your sector? (Select All that apply)

1. Television
2. Print media (newspaper/magazine)
3. The internet
4. e-Word-of-mouth (Websites, Facebook, Twitter, Instagram)
5. Word-of-mouth (friends, work colleagues)
6. Travel/trade shows
7. Do not receive any

Any other thoughts regarding your world of work?

EMPLOYER QUESTIONNAIRE

Dear Respondent,

The North-West University's (NWU) Tourism Research in Economic Environs and Society (TREES) research unit under the auspices of CATHSSETA is conducting a Sector Analysis to review the employer and employee profile of the Conservation/Hospitality/ Tourism and Travel Services sub-sectors considering the changes in this sector over the last year. As part of the study, you have been identified as a potentially key resource within the South African Conservation/Hospitality/ Tourism and Travel Services sub-sectors and you are being invited to participate in our study as survey participant. The relevant Scientific and Ethics Committee of the Faculty of Economic and Management Sciences (FEMS) at the NWU has approved the study and has therefore provided the following ethics clearance number: N W U - 0 0 5 5 2 - 2 3 - A 4. Thank you very much for your time and support. Please, if you have any questions contact: Prof Elmarie Slabbert on 083 321 6338.

Please rate the importance of the following skills for someone working in your business:

	Not important	Somewhat important	Important	Very important	Extremely important
Customer service skills	❑	❑	❑	❑	❑
Networking skills	❑	❑	❑	❑	❑
Verbal communication skills	❑	❑	❑	❑	❑
Written communication skills	❑	❑	❑	❑	❑
Flexibility skills	❑	❑	❑	❑	❑
Organisation skills	❑	❑	❑	❑	❑
Language skills	❑	❑	❑	❑	❑
Commitment	❑	❑	❑	❑	❑
Can-do attitude	❑	❑	❑	❑	❑
Multi-tasking skills	❑	❑	❑	❑	❑
Cultural awareness	❑	❑	❑	❑	❑
Technology skills	❑	❑	❑	❑	❑
Empathy and emotional intelligence	❑	❑	❑	❑	❑
Teamwork	❑	❑	❑	❑	❑

Stress management	❑	❑	❑	❑	❑
Time management	❑	❑	❑	❑	❑
Problem-solving	❑	❑	❑	❑	❑
Listening skills	❑	❑	❑	❑	❑
Digital skills	❑	❑	❑	❑	❑

What is the most important consideration when employing someone in your business?

How did your business changed because of COVID-19?

How are occupations/jobs evolving in this sector? Do you see any new types of occupations/jobs developing in this sector in the next few years?

How do you see the future of this sector in South Africa?

In which sub-sector does your place of work operate?

1. Hospitality
2. Conservation
3. Tourism and Travel Services

In which province are you operating?

1. Limpopo
2. Free State
3. North-West
4. Northern Cape
5. Western Cape

6. Eastern Cape
7. Gauteng
8. Mpumalanga
9. KwaZulu-Natal

Describe, in short, the scope of your business?

How long has the business been in existence?

What is the size of your business based on the number of employees?

1. Small: 0 - 49
2. Medium: 50-149
3. Large:150+

What was the annual turnover of your business in 2021?

1. R500 000
2. R1.5 million
3. R3 million
4. +R3 million

What was the annual turnover of your business in 2022?

1. R500 000
2. R1.5 million
3. R3 million
4. +R3 million

Does your business participate in CATHSSETA initiatives?

1. Yes
2. No

Please specify your participation in CATHSSETA initiatives

How involved are you in discussions related to the sector, for example discussions around policies. Please elaborate.

To which sector organisations and associations do you belong and please describe your role in these.

Of the total number of staff members in your company, how many are:

	South African citizens	Foreign nationals
Black African	❑	❑
White	❑	❑
Coloured	❑	❑
Indian/Asian	❑	❑
Male	❑	❑
Female	❑	❑
Identify as other	❑	❑
Live with a disability	❑	❑
Permanent staff members	❑	❑
Male permanent staff members	❑	❑
Female permanent staff members	❑	❑
Permanent staff members who identify as other	❑	❑
Permanent staff members who live with disability	❑	❑
Temporary staff members	❑	❑
Male temporary staff members	❑	❑
Female temporary staff members	❑	❑
Temporary staff members who identify as other	❑	❑

Temporary staff members who live with disability	❑	❑

In your company, how many high-skilled staff members do you have per category as follows:

	Number of employees
Male	❑
Female	❑
Identify as other	❑
Living with disability	❑
Black African	❑
White	❑
Coloured	❑
Indian/Asian	❑

In your company, how many medium-skilled staff members do you have per category as follows:

	Number of employees
Male	❑
Female	❑
Identify as other	❑
Living with disability	❑
Black African	❑
White	❑
Coloured	❑
Indian/Asian	❑

In your company, how many low-skilled staff members do you have per category as follows:

	Number of employees
Male	❑
Female	❑
Identify as other	❑

Living with disability	❏
Black African	❏
White	❏
Coloured	❏
Indian/Asian	❏

In your company, how many staff members with a post-Matic qualification do you have category as follows:

	Number of employees
Male	❏
Female	❏
Identify as other	❏
Living with disability	❏
Black African	❏
White	❏
Coloured	❏
Indian/Asian	❏

In your company, how many staff members with a qualification in tourism related fields do you have per category as follows:

	Number of employees
Male	❏
Female	❏
Identify as other	❏
Living with disability	❏
Black African	❏
White	❏
Coloured	❏
Indian/Asian	❏

Which gender do you identify with?

In which age category do you fall?

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55+

How would you best describe yourself?

1. South African citizen
2. Foreign national residing in South Africa

Please indicate your country of origin

With which race group do you associate?

1. Black African
2. White
3. Coloured
4. Indian/Asian

Highest qualification?

1. Non-formal education
2. General Education (High School) Diploma
3. Certificate
4. Tertiary Diploma
5. Bachelor’s Degree
6. Postgraduate Degree

Please indicate at which Tertiary Education Establishment you studied for your highest qualification.

Do you have any form of disability?

1. No
2. Yes

If yes, please provide more information

What is your marital status?

1. Single (never married)
2. Married
3. Domestic partnership
4. Widowed
5. Divorced
6. Separated

In which position are you currently employed?

How long have you been employed in this position? (In months)

Which platforms do you use to get information about your sector? (Select all that are relevant)

1. Television
2. Print media (newspaper/magazine)
3. The internet
4. e-Word-of-mouth (Websites, Facebook, Twitter, Instagram)
5. Word-of-mouth (friends, work colleagues)
6. Travel/trade shows

7. Do not receive any

Any other ideas, information or wisdom to share?