

SECTOR SKILLS PLAN

2020/21-
2024/25



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA





Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority

**2020/21 - 2024/25
SECTOR SKILLS PLAN**

2022/23 FINANCIAL YEAR UPDATE

Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority

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FOREWORD

I have the pleasure of presenting to you the Sector Skills Plan (SSP) update for the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA), for the period 2022 - 2023. On 1 April 2020, the Minister of Higher Education, Science and Innovation, Honourable Dr Bonginkosi Nzimande, appointed a new CATHSSETA Accounting Authority, including myself as its Chairperson, to lead the Accounting Authority until 2025. This appointment came at a time when the country has been under lockdown - due to the COVID-19 Pandemic - with the need to put measures in place to curb its spread.

The shockwave of the COVID-19 Pandemic across the world has choked many economies, including ours. All the six CATHSSETA sub-sectors have been negatively affected by the COVID-19 lockdown. The once-booming tourism industry has come to a grinding halt. In Sports and Recreation, all sporting activities have either been cancelled or postponed. The Arts and Culture sub-sector has also been negatively affected, as all types of productions have been halted until it is safe to continue with the productions. The Conservation sub-sector, which relies heavily on sectors such as Travel and Tourism, as well as Hospitality, have also closed. The Hospitality sub-sector was not spared, until regulations were eased recently to allow local travel and accommodation services within the country. The Gaming and Lotteries sub-sector has seen a shift, as lockdown levels were eased to open the economy, thus allowing casinos to operate.

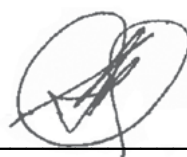
Our priority as a SETA is to save the education and training year for our learners, training providers and employers. We need to invest in new modes of learning delivery that are online and can support learners during this Pandemic.

The SSP review aims to gather information about the gaps and trends in our diverse sectors through

research and information-sharing platforms. More than ever before, we realise that there is much more that still needs to be done for sectors such as Conservation, Gaming and Lotteries, as well as the labour sector. During implementation, we will be looking into ways of empowering these smaller sub-sectors.

In conclusion, I would like to thank Honourable Dr Bonginkosi Nzimande for his support and leadership during this time of uncertainty. It is to them that we look for strategic leadership in response to the aftermath of the pandemic. We urge our stakeholders to exercise caution at this stage as the economy opens up for business gradually, and to look into different public and private relief funds that have been set up to assist those who have been most affected.

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



Mr David Themba Ndhlovu
Accounting Authority Chairperson

AUTHORISATION OF THE SECTOR SKILLS PLAN

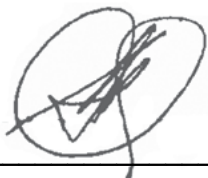
We, the undersigned, hereby approve, on behalf of the CULTURE, ARTS, TOURISM, HOSPITALITY AND SPORT SECTOR EDUCATION AND TRAINING AUTHORITY, the contents of the Sector Skills Plan update for the period 2022 – 2023.

Approved by:



Mr Marks Thibela

Chief Executive Officer

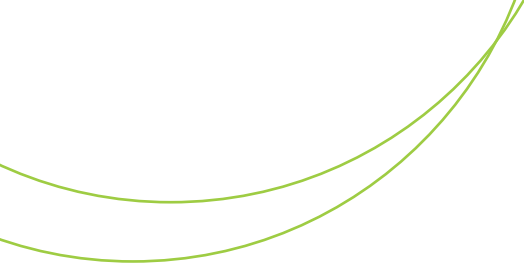


Mr David Themba Ndhlovu

Accounting Authority Chairperson

ABBREVIATIONS AND ACRONYMS

4IR	Fourth Industrial Revolution
AET	Adult Education and Training
CATHSSETA	Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority
CET	Community Education Training
CHE	Council of Higher Education
DAC	Department of Arts and Culture
DEA	Department of Environmental Affairs
DG	Discretionary Grant
DHET	Department of Higher Education and Training
ERRP	Economic Reconstruction and Recovery Plan
GDP	Gross Domestic Product
GGR	Gross Gambling Revenue
HTFV	Hard-to-fill-vacancies
HEI	Higher Education Institution
HEMIS	Higher Education Management Information System
HRD	Human Resource Development
ICT	Information and Communication Technology
KZN	KwaZulu-Natal
MTSF	Medium Term Strategic Framework
MOU	Memorandum of Understanding
NCV	National Certificate Vocational
NDP	National Development Plan
NDT	National Department of Tourism
NGB	National Gambling Board
NGO	Non-Governmental Organisation
NHEIPE	National Higher Education Institute for Physical Education
NPO	Non-Profit Organisation
NQF	National Qualifications Framework
NSDP	National Skills Development Plan
NSDS	National Skills Development Strategy
NSRP	National Sport and Recreation Plan
NTSS	National Tourism Sector Strategy
OFO	Organising Framework for Occupations
PIVOTAL	Professional, Vocational, Occupational, Technical and Academic Learning



QCTO	Quality Council for Trades and Occupations
QMR	Quarterly Monitoring Report
RPL	Recognition of Prior Learning
SACPO	South African College Principals Organisation
SALGA	South African Local Government Association
SAMSA	South African Maritime Safety Authority
SANBI	South African National Biodiversity Institute
SANParks	South African National Parks
SARB	South African Reserve Bank
SARS	South African Revenue Services
SASCOC	South African Sports Confederation and Olympic Committee
SAT	South African Tourism
SETA	Sector Education and Training Authority
SIC	Standard Industrial Classification
SIPs	Strategic Integrated Projects
SEs	Small Enterprises
CIMS	CATHSSETA Information Management System
SPOL	Sectoral Priority Occupations List
SRSA	Sports and Recreation South Africa
SSP	Sector Skills Plan
SACO	South African Cultural Observatory
Stats SA	Statistics South Africa
TBCSA	Tourism Business Council of South Africa
TSA	Tourism Satellite Account
THRD	Tourism Human Resource Development Strategy
TVET	Technical and Vocational Education and Training
Out	University of Technology
WIL	Work Integrated Learning
WRP	Work Readiness Programme
WTTC	World Tourism and Travel Council

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CATHSSETA has compiled the SSP update for the period 2022-2023. This SSP is prepared in accordance with Section 10 (1) (a) of the Skills Development Act (SDA) of 1998, which mandates the SETA to develop an SSP within the Framework and Guidelines included in the National Skills Development Plan (NSDP), 2030, for the period 2020 to 2030, as well as requirements set out by the Department of Higher Education and Training (DHET) SSP Framework and Guidelines. The key policy drivers identified and considered in this SSP are the National Development Plan (NDP), 2030, the White Paper for Post-School Education and Training, the SETA Grant Regulations and the National Skills Development Plan (NSDP) 2030. Further sub-sectoral specific plans considered, include the Department of Arts and Culture (DAC) Strategy, the National Sport and Recreation Plan (NSRP), the National Tourism Sector Strategy (NTSS), the Tourism Human Resources Development (THRD) Strategy, the Lotteries Act 32 of 2013, and the South African Economic Reconstruction and Recovery Plan (ERRP) Strategy.

CATHSSETA is organised into six sub-sectors – Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness; and Tourism and Travel, representing an extremely vast and varied sector in terms of nature, scope and size. The geographical profile of the sector indicates a greater concentration of employers and employees in Gauteng, the Western Cape and KwaZulu-Natal. Overall, COVID-19 has affected the economic performance of the sector, in that the overall number of large entities registered with CATHSSETA has decreased by 60%, from 776 in 2019/20 to 465 in 2020. A Research Study on the impact of COVID-19 in the sector will be undertaken to assess the overall impact of the Pandemic on the sector, as well as its implications for skills development. Relative to the previous years, significant strides have been made towards greater representation and overall transformation of the sector. However, while most

employees in the sector are African females, the vast majority of these occupy lower occupational groups, indicating a need for further transformation of the sector. Most employees in the sector are classified as youth (under 35), indicating that the SETA needs to prioritise and support the development of youth in the various sub-sectors.

There are change drivers which influence the supply and demand of skills, either positively or negatively. CATHSSETA takes into consideration these drivers of change, and their inevitable implications on Skills Development, by directing relevant Programmes and Learning Interventions to support and/or mitigate their effects. The change drivers identified are COVID-19, Technology and the Digital Divide, Gig Economy and the Green Economy.

The analysis of the demand and supply of skills within the sector was assessed utilising Mandatory Grant application data and inputs from relevant stakeholders. The analysis and interpretation of the consolidated inputs are augmented by research conducted by CATHSSETA and its partners. The data analysis was conducted as follows: (a) data was checked, validated and missing values were identified and addressed; (b) validated data was organised for exploratory analysis; (c) descriptive statistics were produced, including mean, minimum and maximum values for identified variables; (d) categorical data was used to conduct qualitative analysis; (e) historical data, derived from the analysis of previous periods reported, and planned training intervention data were used; (f) analysed data was presented in the form of tables, graphs and summary statistics; and (g) trend analysis, based on historical data, combined with consultation inputs for comparison across different categories and over various time periods, was conducted.

The recognition of priority skills is based on the occupations identified as experiencing shortages. The identified occupational shortages are a function

of two determinants: the number of vacancies in the sector and the degree of scarcity of vacancies identified.

To support the industry's success and facilitate this projected growth, industry partners must work together to ensure access to suitably skilled labour. In response to this, this SSP will contribute to the following skills development priorities in the sector:

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

The SSP contains six chapters. Chapter 1 presents the profile of the sector and examines the six sub-sectors, in terms of scope, key role-players, economic performance and labour market profile. Chapter 2 identifies key skills issues in the sector and their implications for skills planning, together with the policy frameworks affecting the demand and supply of skills in the sector. Chapter 3 considers the demand and supply of skills and concludes with the identification of occupational shortages and skills gaps in the sector. Chapter 4 provides an outline of sector partnerships that CATHSSETA currently has

in place and new partnerships that are required. Chapter 5 reflects on the SETA's achievements of its strategic priorities based on its performance in the previous financial year. Finally, Chapter 6 summarises key findings from the previous chapters and identifies development priorities.

Approved By:



Mr Marks Thibela

Chief Executive Officer



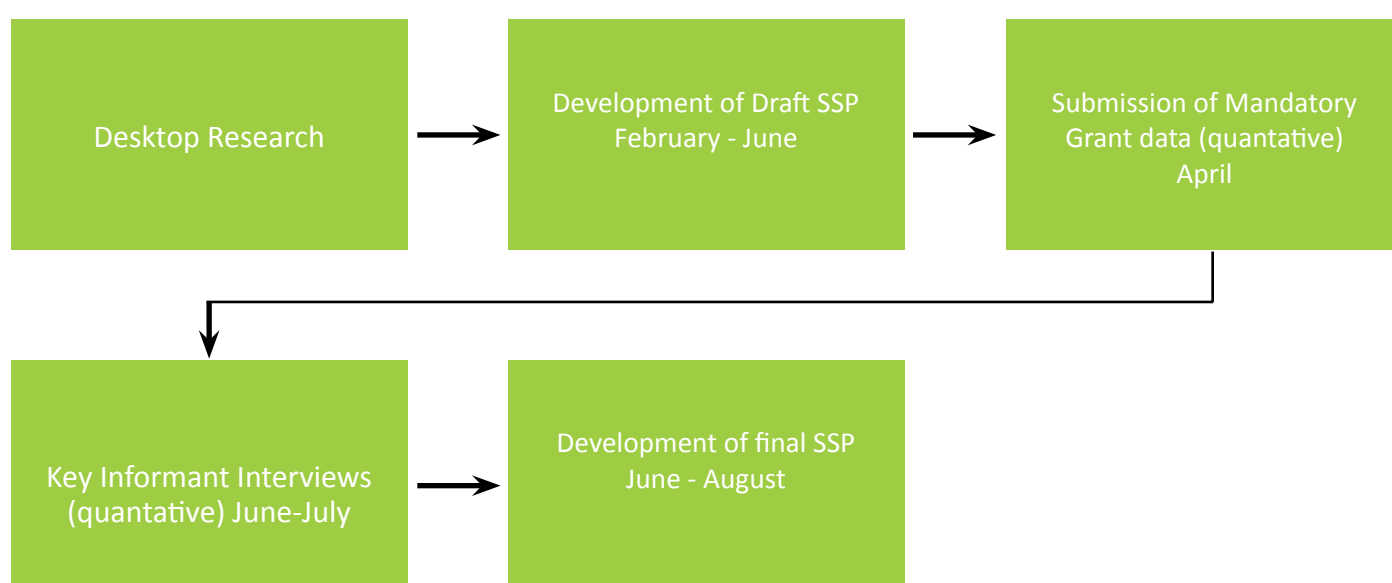
Mr David Themba Ndhlovu

Accounting Authority Chairperson

This section details the research process and methods CATHSSETA has used in updating the 2022/23 SSP. The process entailed conducting primary and secondary research for the collection of data. The methodology employed for this SSP included both qualitative and quantitative research methods. Desktop research was conducted on the economic, social and development status of the sector. Data and publications from the Higher Education Management Information System (HEMIS) and industry regulators and entities such as the National Gambling Board (NGB) and South African Tourism (SAT), were also used. Primary sources of data included Mandatory Grant application data (previously known as the Workplace Skills Plan and Annual Training Report), the CATHSSETA Information Management System (CIMS), as well as internal and external stakeholder consultative sessions to elicit further input into the Plan.

The process outlined in the figure below is followed on an annual basis. The updating of the SSP begins in February of every year and continues until the final submission on the 1st of August. The Research, Planning and Performance unit conducted desktop research using secondary data sources to examine economic performance in the country and key skills issues affecting the sector. These secondary data sources included GDP performance figures from Stats SA, the World Tourism and Travel Council (WTTC), the National Gambling Board, and information from the Department of Planning, Monitoring and Evaluation, to mention a few. Qualifying employers are expected to submit their Mandatory Grant applications by the 30th of April. The Mandatory Grant application process requires applicants to supply the SETA with specified data to be eligible for the grant. Owing to the COVID-19 Pandemic, the SETA has had to amend its research processes, instead of the usual face-to-face key informant interviews, the SETA conducted interviews with key role-players from June to July 2021. The research team planned to facilitate a qualitative focus group session to validate the results of the draft 2022/23 draft SSP, however due to the low participation rate, the session was cancelled due to a lack of proportionate representation across the sub-sectors.

FIGURE 1: SECTOR SKILLS PLAN UPDATE AND DATA COLLECTION CYCLE



The SETA conducted the following research studies, detailed in the table below, during the 2020/21 period.

TABLE 1: CATHSSETA RESEARCH STUDIES

TOPIC	TYPE OF STUDY	OBJECTIVES OF STUDY	DATA COLLECTION TOOL	SAMPLE SIZE AND SCOPE OF STUDY	LIST OF DATA SOURCES	TIMEFRAME OF STUDY
The Extent of Active Labour Unions in the CATHSSETA Sub-sectors	Quantitative Study	To examine the extent of involvement of labour unions in the six CATHSSETA sub-sectors.	Online survey and telephonic interviews	445 employers	MG database Department of Labour list of Registered Labour Unions	December 2019 – March 2020
Impact of the Fourth Industrial Revolution (4IR) on the six sub-sectors within CATHSSETA	Qualitative Study	To assess the impact that the 4IR has on the six sub-sectors within CATHSSETA	Secondary data – document analysis and review and Interview questionnaire	12 4IR Published Experts. 100 employers	CATHSSETA stakeholder database and Publications	January - July 2021
Sector Analysis: Gaming and Lotteries Sub-sector	Quantitative Study	Provide detailed analysis of the economic and labour market outlook for the Gaming and Lotteries sub-sector; Identify emerging trends and related occupational patterns and skills in the Gaming and Lotteries sub-sector; Examine the employer and employee profile of the Gaming and Lotteries sub-sector; and Identify and provide analysis on the extent of key-role player participation in the Gaming and Lotteries sub-sector.	Secondary data – document analysis and review	Gathering of secondary data on sectoral performance of the Gaming and Lotteries sub-sector	CATHSSETA stakeholder database Publications and quantitative data/information on licensed casinos, gambling, national lottery, and gambling boards	November 2020 – May 2021
Effect of COVID-19 on CATHSSETA sub-sectors	Qualitative Study	To examine the extent to which COVID-19 has affected training provision in the sector To assess the economic performance of the CATHSSETA sub-sectors amidst the COVID-19 Pandemic To determine ways to mitigate the effects of COVID-19 on training provision and skills development in the sector	Desktop research	Desktop literature review	Desktop research	Jan – May 2021
SETA Employer Interviews	Mixed method	Gain insight on occupations in high demand and skills gaps in the sector; Identify common skills gaps to compare with other sources of evidence (e.g.; MG data and desktop research findings); Engage key-role players on the effects of COVID-19 on employment in the sector to date and the extent to which training has been a priority; Determine change drivers in the sector and outline their implications for skills development;	Interview questionnaire	26 key role players	DG database MG database	June – July 2021



A range of data sources have been used to develop this SSP. These sources are:

1. CIMS - an electronic data management tool used for the processing of Mandatory Grant applications, certification and registration of qualifications, learners, and skills development facilitators. CIMS is also a data-storage and reporting facility.
2. CIMS has a Discretionary Grant portal used to receive all Discretionary Grant applications online. This approach also requires that applicants register with CATHSSETA and provide the information necessary for profiling the sector.
3. Workplace Skills Plan (WSP) data on sector employment, as well as demographic and occupational profiles of employees per sub-sector. The total Mandatory Grant applications submitted in the 2021/22 period amounted to 1 150. Data for Mandatory Grants was collected based on the Organising Framework for Occupations (OFO), version 2019.
4. National data sources include the HEMIS, maintained by DHET, publications and reports by the WTTC, the NGB and SAT, as well as research conducted by other government departments, national research institutions and industry publications.
5. Another newly developed and useful dataset is the Tourism Satellite Account (TSA) by Stats SA. The TSA is an accounting framework adopted by the United Nations (UN) and designed to measure goods and services associated with tourism, according to international standards, concepts, classifications and definitions. The TSA provides stakeholders with reliable data to assist them in the design of public policies and business strategies for tourism and for the evaluation of their efficiency.
6. CATHSSETA, together with the relevant national and provincial government departments in the sector, conducts research to ensure there is sufficient data to accurately analyse the labour market and the skills needs of the sector.
7. Findings from online and telephonic consultations with key sector stakeholders have been incorporated in the final SSP update. Internal stakeholders (regional managers, relevant governance structures) have also provided input.

CHAPTER 1: ECONOMIC SECTOR PROFILE

1.1. Introduction

This chapter focuses on the composition of the sector, with the aim of providing a profile in terms of size, coverage and economic performance. Key data sources include Mandatory Grant data, Stats SA, and sub-sector strategies. The chapter is organised into five main sub-sections:

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

1.2. Scope of Coverage

CATHSSETA has clustered the Standard Industrial Classification (SIC) codes into six sub-sectors, namely the Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness; as well as Tourism and Travel services. All these sub-sectors fall within the broader services sector of the economy.

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

The scope of a SETA is based on the standard industrial classification of all economic activities as defined by the South African Revenue Services (SARS). The SETA landscape for NSDP 2030 is promulgated in the Government Gazette of July 2019, which re-established SETAs from 1 April 2020 to 31 March 2030. The Gazette places 62 SIC codes within CATHSSETA's scope of activity, as listed in table 2.

TABLE 2: SIC CODES

CONSERVATION	
11520	Hunting and trapping, including related services
96333	Game parks, reserves, including but not limited to, wildlife, parks, zoological or animal parks and botanical gardens
96334	Activities of conservation bodies
96335	Wildlife conservation, including wildlife, game, parks, game reserves, zoological establishments, botanical gardens

ARTS, CULTURE AND HERITAGE	
9003	Production of craft art
9004	Production of traditional art
9005	Production of designer goods
9006	Production of functional wares
9007	Production of souvenirs
96140	Dramatic arts, music and other arts activities
96141	Activities of artists and entertainers
96142	Activities of theatre and entertainment technicians
96143	Production of 'live' theatrical and artistic events
96144	Activities of arts councils and other related institutions
96190	Other entertainment activities N.E.C.
96320	Museum activities and preservation of historical sites
96322	Provision for management and operation of monuments, historical sites and buildings
96323	Management and operation of museum, cultural and heritage activities
96492	The activities of casting for motion pictures, television and theatre productions
GAMING AND LOTTERIES	
96419	Operation and management of horse-racing events and clubs and academies
96494	Gambling, licensed casinos and the national lottery, but not limited to bookmakers, totalisators, casinos, bingo operators
HOSPITALITY	
64101	Hotels, motels, boatels and inns registered with SA tourism board
64102	Caravan parks and camping sites
64103	Guest houses and guest farms
64104	Hotels, motels, boatels and inns not registered with SA tourism board
64105	Bed-and-breakfasts
64106	Management and operation of game lodges
64201	Restaurants or tearooms with liquor license
64202	Restaurants or tearooms without liquor license
64203	Take-away counters
64204	Caterers
64205	Take-away restaurants
64206	Fast food establishments
64207	Other catering services N.E.C including pubs, taverns, night clubs
64209	Other catering services N.E.C
84111	Timesharing
88994	Bioscope cafes
96195	Operation and management of convention centres

SPORT, RECREATION AND FITNESS	
93195	Operation and management of health and well-being centres, including, but not limited to, hydros, spas, fitness centres
96000	Recreational, cultural and sporting activities
96002	Recreational, leisure and outdoor adventure activities, including the management and operation of facilities, government departments
96196	Amusement parks
96410	Sporting activities
96411	Operation and management of sporting facilities and clubs
96412	Operation and management of sports academies
96413	Promotion and management of sporting events and activities
96415	Management and operation of non-motorised sporting activities
96417	Sporting activities, including, but not limited to, sports federations
96418	Management and operation of motorised sporting activities
96491	The operation and management of recreation parks and beaches, fairs and shows of a recreational nature and recreational transport activities
TOURISM AND TRAVEL SERVICES	
71214	Tour operators (inbound and outbound tour operators)
71222	Safaris and sightseeing bus tours
71223	Safaris and sightseeing trip operators
73002	Inbound international flights
74140	Travel agency and related activities
85110	Renting of land transport equipment
85111	Renting of land transport equipment, including car rentals
8899A	Event and conference management
96195	Operation and management of convention centres
96336	Tourist info centres
99028	Car hire
99048	Tourism authorities, including, but not limited to, tourism marketing, tourist information centres, publicity associations
99049	Guides, including tourist river, mountain etc.

1.3. Key Role-Players

The sector is a regulated industry and has several key role-players, ranging from regulatory institutions and employer representatives, to organised labour associations. Table 3 indicates the broad contributions each of these make to the sector. Their contributions range from paying skills levies, supporting SETA partnerships, representing the interests of the state to supporting skills development through various learning interventions, such as providing workplace mentorship and coaching. Key role-players also provide CATHSSETA with the data and strategic information necessary for planning skills development interventions.

TABLE 3: CATHSSETA KEY STAKEHOLDERS

NATIONAL DEPARTMENTS		
Outcome 8 of the NSDP – Support Career Development Services: Encourages the SETA to facilitate accessible career development opportunities. The SETA has partnered with various Departments, including the National Department of Tourism for the National Tourism Careers Expo; Limpopo’s Economic Development, Environment and Tourism Department for the Marula Festival; and DHET on the Mandela Day Career Development Festival.		
Department	Role	Role in CATHSSETA
Department of Higher Education and Training	Higher education and training, skills development	Skills development policy and regulation, planning for Higher Education and Training, co-operation and resources; research development and support; and socio-economic innovation
Department of Sports, Arts and Culture	Policy and Regulation within the Sports, Arts and Culture sub-sector	Contributes to the SETA administration fee. The 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.
Department of Tourism	Policy and regulation, which is, amongst other things, a National Tourism Sector Strategy	Contribution to the SETA administration fee, and, through the National Tourism Sector Strategy (NTSS), advocates the Tourism Human Development Strategy
Department of Environment, Forestry and Fisheries	Policy and regulation, Custodian of the Industrial Policy Action Plan (IPAP)	Instrumental in driving the Environmental Sector Skills Plan, since 2010.
Department of Employment and Labour		Through Sectoral Determination and all labour matters in the SETA workplace
Department of Trade and Industry		Trade policy regulation and industry development, responsible for the gaming sector
EMPLOYER INTEREST GROUPS		
Outcome 2 of the NSDP: Linking education and workplace: Encourages employers to open workplace learning opportunities for students and graduates completing qualifications in the sector. Outcome 2 together with Outcome 5: Support the growth of the Public College system to further encourage collaboration with TVET Colleges for the facilitation of TVET lecturer workplace exposure.		
Employer Stakeholder	Role	Role in CATHSSETA
Federated Hospitality Association of Southern Africa (FEDHASA)	Employer interest, regulations, professional standards and training	Industry representation and partnerships within the Hospitality sub-sector
South African Football Association (SAFA)	Single major sports’ body in the country, regulating national professional football	Football industry representation and the promotion of skills development
Tourism Business Council South Africa (TBCSA)	Promotes interests of the private sector within the tourism industry	Watchdog for the private sector within the area of tourism and the promotion of skills development
Visual Arts Network of South Africa (VANSA)	A national network of artists and arts organisations	Develops industry knowledge, resources and networks, including skills development and professional standards.
South African Chef Association (SACA)	A network of chefs, cooks and culinary professionals	Promotes the art and science of cooking by sharing knowledge and teaching skills development
Employers	Various employers from the 6 sub-sectors	Open workplace learning opportunities for students and graduates completing qualifications in the sector

PUBLIC ENTITIES

Outcome 1 of the NSDP: To identify and increase production of occupations in demand: It outlines various sub-outcomes aimed at increasing the identification and increase of priority occupations and qualifications in the sector. CATHSSETA is part of a Post-school Education and Training (PSET) research forum, together with other public entities in the PSET sector, to encourage learning and best practice approaches for labour market intelligence and the identification of skills needs.

Entity	Role	Role in CATHSSETA
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 Qualification's 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

ORGANISED LABOUR

Outcome 7 of the NSDP: Encourage and Support Worker-Initiated Training: encourages skills levy-paying institutions to collaborate with federations/trade unions in identifying skills needs and implementing relevant interventions for the sector.

Employee stakeholder	Role	Role in CATHSSETA
South African Commercial, Catering and Allied Workers Union (SACCAWU)	Employees' interest group, lobbying labour matters in the commercial and catering sectors	Sector employee representation on the CATHSSETA's Accounting Authority (AA)
Hospitality Industries and Allied Workers Union (HIAWU)	Employees' interest group, lobbying labour matters in the Hospitality sector	
Hotel, Liquor, Catering, Commercial and Allied Workers Union of South Africa (HOTELLICA)	Employees' interest group, lobbying labour matters in the hotel and catering sector	
Creative Workers Union of South Africa (CWUSA)	Employees' interest group, lobbying labour matters in the creative arts sector	
South African Football Players Union (SAFPU)	Employees' interest group, lobbying labour matters in the football sector	
Accounting Authority representation	Represents the interests of its members as employees in the sector	

TRAINING PROVIDERS

Outcome 5 of the NSDP: Support the growth of the Public College System: Advocates SETA support for TVET Colleges and Community Education and Training (CET) Colleges in implementing occupationally directed programmes.

Employee Stakeholder	Role	Role in CATHSSETA
Universities	Provides higher education and training	To offer training services to CATHSSETA stakeholders, particularly at higher national qualifications Framework (NQF) levels. Service delivery vehicle for the SETA

Employee Stakeholder	Role	Role in CATHSSETA
TVET Colleges	Provide technical, vocational and occupational skills	To offer training services to CATHSSETA stakeholders for technical and vocational skills. Service delivery vehicle for SETA
SETA accredited providers	Provide occupational skills training	To offer full and part occupational qualifications to employed and unemployed learners, particularly Learnerships, including workplaces. Service delivery vehicle for SETA

1.4. Labour Union Involvement

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

TABLE 4: ACTIVE LABOUR UNIONS

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

1.5. Economic Performance

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

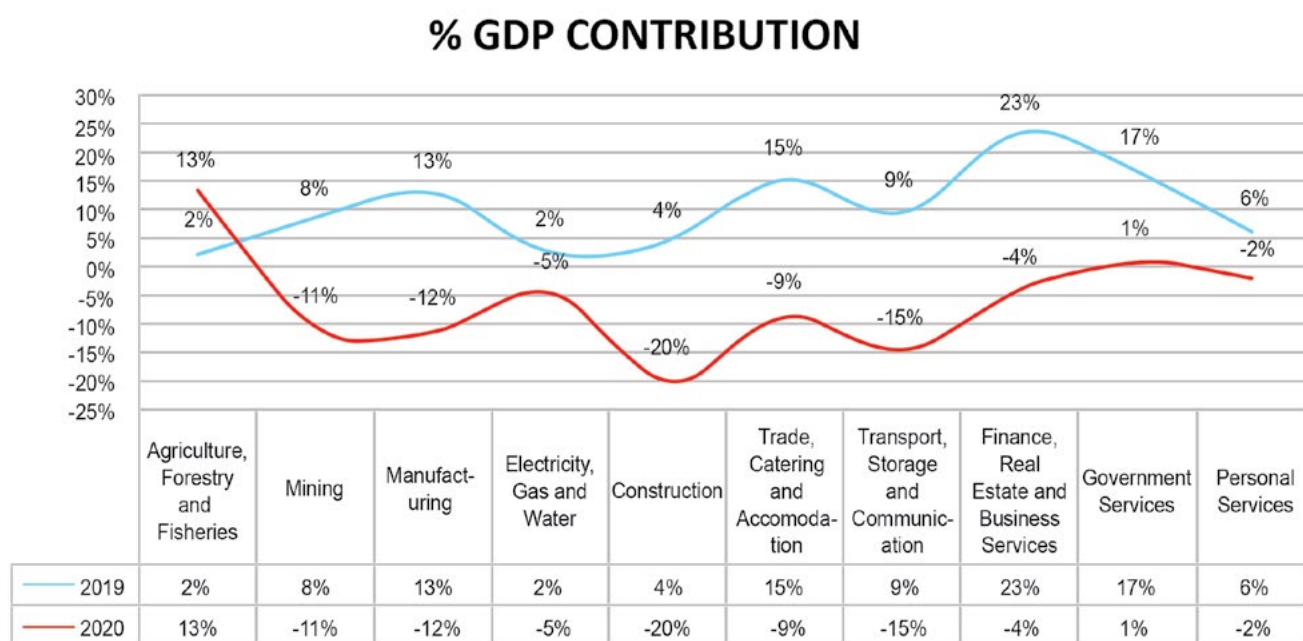
In March 2020, the World Health Organisation (WHO) declared COVID-19 a global health pandemic. While Sub-Saharan African countries have managed to keep the COVID-19 virus under control, with a relatively low number of reported cases, the pandemic continues to take a toll on African lives and economies, with economic activities shrinking by an estimated 3.7% in the year 2020.

At a domestic level, South Africa not only entered its third recession since 1994, but the country accounts for

the highest number of recorded coronavirus cases in the continent. To mitigate the risk of infection, South Africa put in place strict lockdown measures to combat the spread of the virus, which further weakened an already fragile South African economy. Overall, in 2020 the South African economy contracted by 7%. The second quarter of 2020 has been coined the COVID-19 quarter due to Gross Domestic Product (GDP) suffering an annualised reduction of 51%, resulting in a 16% decline in economic output. The last quarter of the financial year saw an annualised growth rate of 6.3%. However, the growth recorded in the third and fourth quarters was not enough to offset the devastating impact of COVID-19 in the second quarter when lockdown restrictions were at their most stringent (Stats SA, 2021).

The economic performance of the CATHSSETA sector is difficult to assess due to the lack of a single comprehensive sector database, encompassing the six CATHSSETA sub-sectors. The graph below outlines the Stats SA Fourth Quarter GDP report, by percentage contribution, for 2019/20 to 2020/21 financial years. Consistent with the results from other African countries, Agriculture escaped the effects of the pandemic, expanding production by 13.1% in 2020. Other sectors of the economy were severely impacted, resulting in annual real GDP decreasing by 7% in 2020 compared to an increase of 0.2% in 2019.

FIGURE 2: INDUSTRY VALUE-ADDED AND GDP (2019-2020)



Arts, Culture and Heritage

In the Arts, Culture and Heritage sub-sector, South Africa's local film and television industry has been severely impacted by COVID-19 and several productions were halted, not to mention the scores of live events cancelled. The Cultural and Creative Industries (CCIs) globally contribute 3% to the world's GDP and employ 1% of the world's population. In South Africa, 1.7% of the GDP can be attributed to the production value of CCIs, contributing approximately R204 billion to the economy (SACO, 2020). The current crisis is particularly critical for cultural and creative sectors due to the sudden and massive loss of revenue opportunities, especially for the more fragile players such as small businesses and freelancers. In April 2020, it was projected that 65%



of small businesses in the arts and music industries would go under, and the film and tourism sectors would retrench over 55% of its workforce (Fin24, 2020).

Tourism and Travel

According to WTTC (2020), Tourism is responsible for employing one in ten jobs globally and over the past 5 years, one in four jobs created across the world in all sectors and industries, have been in Tourism. The sector accounts for 330 million jobs globally and serves as a catalyst for global economic recovery and growth, contributing 10.3% of the global GDP (USD 8.9 trillion) in 2019. COVID-19 has created one of the worst economic and social crises in history, resulting in the loss of 121 million jobs and livelihoods in the Tourism sector globally.

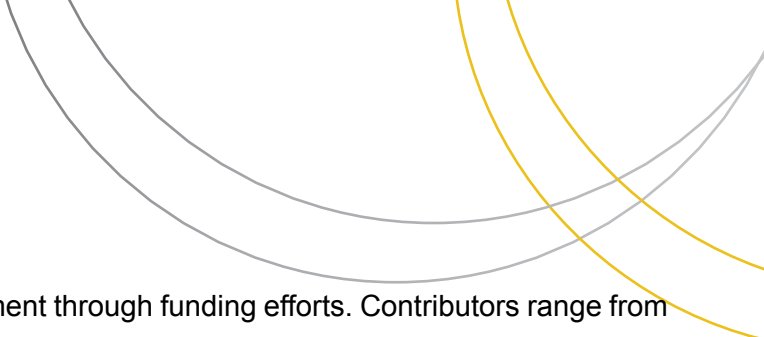
In South Africa, the scope of COVID-19 business disruption in the Tourism and Travel sub-sector is vast. The Tourism Sector Recovery Plan reported that an estimated R52 billion in output was lost between mid-March to end of May 2020 alone. The Ministry estimated a potential 75% reduction in revenue for 2020, putting R149.7 billion in output, 438,000 jobs, and R80,2 billion in foreign receipts at risk (Redflank, 2020). According to the Tourism, 2020 report released by Stats SA, foreign arrivals dropped by 71% from just over 15, 8 million in 2019 to less than 5 million in 2020. The overall number of travellers (arrivals and departures) decreased by 71% between 2019 and 2020. The overall number of travellers decreased by 50,7% over a 15-year period from nearly 24,6 million recorded in 2006 to 12,1 million travellers recorded in 2020 (Stats SA 2021). In addition, a recent survey of African safari tour operators found that over 90% of operators had experienced declines of greater than 75% in bookings and many indicated they had no bookings at all, thus affecting local employment. Travel restrictions during the pandemic have gutted visitor numbers, with 90% of African tour operators reporting a drop in bookings of three-quarters or more in 2020.

Hospitality

The Tourism and Travel sub-sector shares linkages with the Hospitality sub-sector. Similar to the performance of the Tourism sector, income from accommodation decreased by 71.2% year-on-year in January 2021, as a result of a 58.1% decrease in the number of stay unit nights sold. Total income generated by the food and beverages industry decreased by 24.6% in February 2021 compared with February 2020. With the exception of takeaways and fast foods, the largest decrease was recorded for catering services (-50.3%), bar sales (-49.3%) and restaurants and coffee shops (-31.4%) (Stats SA, 2021). Takeaway and fast-food outlets on the other hand, recorded a positive growth of 9.3% in October 2020, and 0.1% increase in February 2021 (Stats SA).

Conservation

In 2019, estimates put the direct value of wildlife tourism at \$120 billion or \$346 billion when multiplier effects are accounted for, generating approximately 21.8 million jobs globally (WTTC, 2019). However, under COVID-19 conditions, the ability of the tourism-based model to continue conserving South Africa's wildlife is now in question. As a result, diverse models for generating income in the sub-sector are needed, such as carbon credits and payment for ecosystem services (Mail and Guardian, 2021).



Africa's wildlife also attracts considerable foreign investment through funding efforts. Contributors range from multilateral institutions and bilateral funding agencies to private foundations, philanthropists, zoos, and non-governmental organisations (NGOs). Since governments face severe budget rises driven by the economic fallout of the COVID-19 Pandemic and the cost of relief measures, shortages in budget compels policymakers to cut anything perceived as “non-essential”, jeopardising the Conservation sub-sector (Nature, Ecology and Evolution, 2020). Safari tours and other forms of wildlife tourism in Africa generate more than \$29 billion each year. Game reserves as part of conservation sector also make up the bulk of South Africa's tourism industry, which indirectly employs some 1.5 million people and contributes 7% of GDP.

Gaming and Lotteries

CATHSSETA partnered with Wits Enterprise to conduct a Sector Analysis on the Gaming and Lotteries sub-sector in South Africa. Results from the study reveal that, despite the general drop in the number of operators in the Gaming and Lotteries sub-sector between 2016 to 2020, there were some encouraging developments in operational performance. The number of Limited Payout Machines (LPMs) and the number of operational bingo outlets as well as the gross gaming revenues (GGR) recorded improved performance during the period. While casinos lost approximately 1.4% in GGR between 2019 and 2020, bingos, LPMs and sports betting gained, respectively, 14.6%, 9.9% and 21.3% during the same period.

Gambling was one of the first industries to feel the immediate impact of the pandemic through the indefinite suspension or outright cancellation of sporting events including the much-anticipated Olympics. Going forward, an analysis by the National Gambling Board (2020) argues for the possibility of future performance declines due to the economic slowdown precipitated by COVID-19 and the country's negative economic outlook. With that said, South Africa's gambling industry reported mixed results during this period. The cancellation of traditional gambling and sporting events has seen a decline in market share of such categories. During the hard lockdown, the gambling industry saw its revenue collapse by 90% as casinos, limited payout machines and bingos were closed to the public (Mail and Guardian, 2021). Online gambling on the other hand, is increasingly taking share from on-the-ground casinos and other betting and reported a surge in activity since the national lockdown in March 2020.

Sports, Recreation and Fitness

The Sport, Recreation and Fitness sub-sector contributes substantially to national, regional, and local GDP. In South Africa, revenue is projected to reach R6.9 billion in 2021, accounting for 1% of the global value of the sports industry.

The business of sport, normally robust against most forces, has also been severely impacted by COVID-19. Sport is a major contributor to economic and social development, however in the face of COVID-19, millions of jobs are at risk globally, not only for sports professionals but also for those in related retail and sporting services industries connected with leagues and events, which include travel, tourism, infrastructure, transportation, catering, and media broadcasting, among others. The disruption of sporting games, tournaments and the Olympics have had an impact on the annual growth rate of the sector. The International Olympic Committee's decision to postpone the 2020 Tokyo Olympics cost an estimated \$2.8 billion to the industry. In addition to the economic repercussion, the cancellation of sporting events also impacts the contribution sports makes to the

empowerment of previously disadvantaged groups, the youth, as well to health and social inclusion (United Nations, 2020).

The SMME Sector

Small, Micro and Medium Enterprises (SMMEs) represent approximately 98% of businesses in South Africa, employing approximately 50% of the country's workforce across all sectors. Consistent with this, 95% of entities under CATHSSETA are categorised as SMMEs, and economic growth is strongly linked to small business development.

As a whole, SMMEs account for 42% of the National GDP. In order to mitigate the effects of COVID-19 on the sector, a Tourism Relief Fund was made available by the National Department of Tourism to provide once-off grant assistance to SMME businesses in the tourism value chain. Capped at R50 000 per entity, the Fund can be accessed by accommodation establishments, hospitality and related services, and travel and related services, such as Tour Operators.

Moreover, on the 26th of January 2021, in response to some of the challenges and impact of the pandemic, the National Department of Tourism in collaboration with the Small Enterprise Finance Agency (SEFA) launched the Tourism Equity Fund (TEF). TEF is an equity fund which aims to support small-scale stakeholders in the industry which is funded by government departments and South Africa's major banks. As the sector continues to reel due to the global COVID-19 Pandemic, the TEF will provide financial assistance to enterprises with a Black Economic Empowerment (BEE) status with the aim to drive transformation from a pool of R1.2 billion to advance equitable opportunities in the sector and ensure inclusive economic activity in the Tourism sector through finance acquisitions, developments, and expansion projects.

1.6. Employer Profile

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

TABLE 5: NUMBER OF ENTITIES REGISTERED WITH CATHSSETA

SUB-SECTOR	SIZE OF ENTITY			NUMBER OF ENTITIES REGISTERED WITH CATHSSETA	% IN THE SECTOR
	SMALL (1-49)	MEDIUM (50-149)	LARGE (150+)		
Hospitality	26 288	1010	240	27 538	67%
Tourism and Travel Services	4 565	70	45	4 680	11%
Sport, Recreation and Fitness	3 488	78	26	3 592	9%
Arts, Culture and Heritage	1 888	42	6	1 936	5%
Conservation	1 809	37	8	1 854	5%
Gaming and Lotteries	1 136	87	140	1 363	3%
Total	39 174	1 324	465	40 963	100%
	96%	3%	1%	100%	

Source: CATHSSETA SARS Hugefile, 2020/21

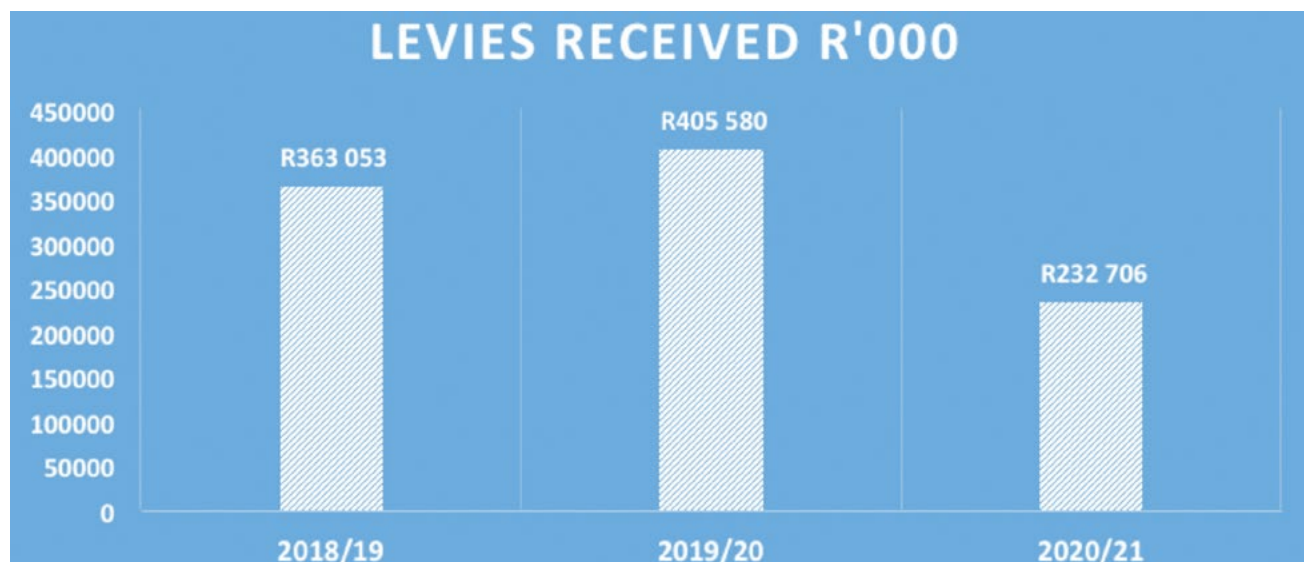
The number of entities shows a slight increase from 40 518, in 2019/20, to 40 963, in 2020/21, amounting to an increase of 445 entities in the sector (1%). While the overall number of entities have increased, the number of large entities has decreased by 60%, from 776 in 2019/20 to 465. The decline in large entities can potentially be attributed to COVID-19. Several businesses were able to scale down on their operational costs through the reduction of working hours and retrenching of staff, resulting in a reduced size of employees. The inverse result of the observed 1% increase in the number of small entities in 2020/21 is possibly the result of large entities downgrading to medium-sized entities, and medium entities to small entities, which would explain the 1% increase in the number of small entities in the sector.

In 2020/21, of the 40 963 employers, the Hospitality sub-sector accounted for most employers in the sector, 67%, followed by 11% employers in Tourism and Travel. The least represented sub-sector is Gaming and Lotteries (3%), which has increased by 2% from the previous financial year. Overall, 96% of the sector comprised of small entities, increasing by 1% from the previous year. Small entities are predominantly exempt from payment of the Skills Development Levy (SDL). Considering the size of the overall sector, combined with the fact that small entities account for 96% of the latter, the allocation of resources becomes a challenging task.

As part of the National Disaster Management Tax Relief Fund, employers in the sector were given a 4-month SDL payment holiday, effective from 1 May 2020, to assist employers in the sector with cash flow for their respective businesses. This is estimated to have provided a relief of approximately R6 billion, which translates into a revenue loss of R6 billion to the SETA system as a whole.

To examine levy income from organisations within the sector, the figure below compares the total levies received in the past three-year period, from the 2018/19 to 2020/21 financial years. The total levies received from employers have decreased by approximately 43%, from R406 million, in 2019/20, to R233 million in the 2020/21 financial year.

FIGURE 3: LEVIES RECEIVED IN THE 2018/19 – 2020/21 FINANCIAL YEARS

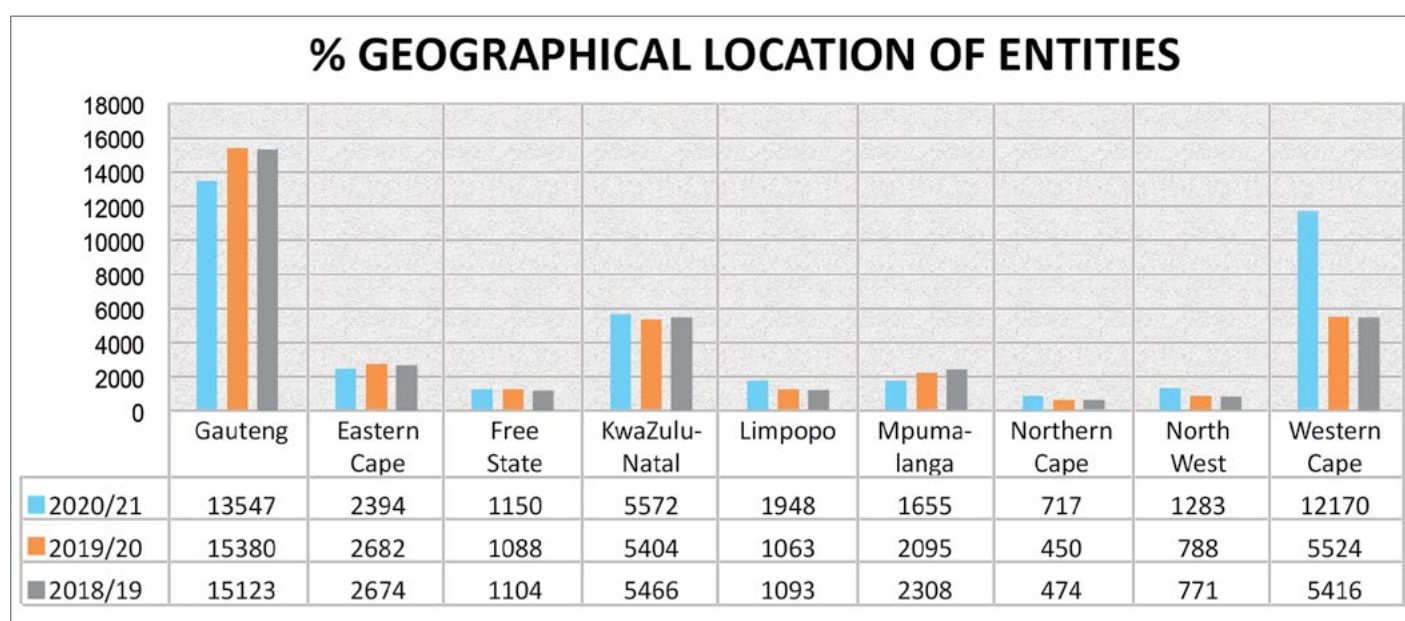


Source: CATHSSETA Unaudited Annual Financial Statements, 2020/21

Consistent with the overall economic performance of the sector, the total number of levy payers decreased from 8 486 in 2019/20 to 8 026 in 2020/21. Out of the total 40 963 entities registered in the sector, only 20% contribute to skills levies. Approximately 50% of the levy income received, as regulated, is directed to sectoral priority occupations training interventions in the sector.

The geographical spread of entities in the sector is illustrated in figure 4 below, with the majority (33%) located in Gauteng, followed by the Western Cape (30%) and KwaZulu-Natal accounting for 14%. The least-represented provinces include the Free State (3%), the North -West (3%) and the Northern Cape (2%).

FIGURE 4: GEOGRAPHICAL LOCATION OF ACTIVE ENTITIES CONTRIBUTING TO SDL



Source: CATHSSETA SARS Hugefile, 2020/21

1.7. Labour Market Profile

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

The table below illustrates the total number of employees in the sector by sub-sector, as well as employee trends over the last three-years. A total of 170 841 employees are employed in the sector. There has been a 19% decline from the 2020/21 figure of 210 933.

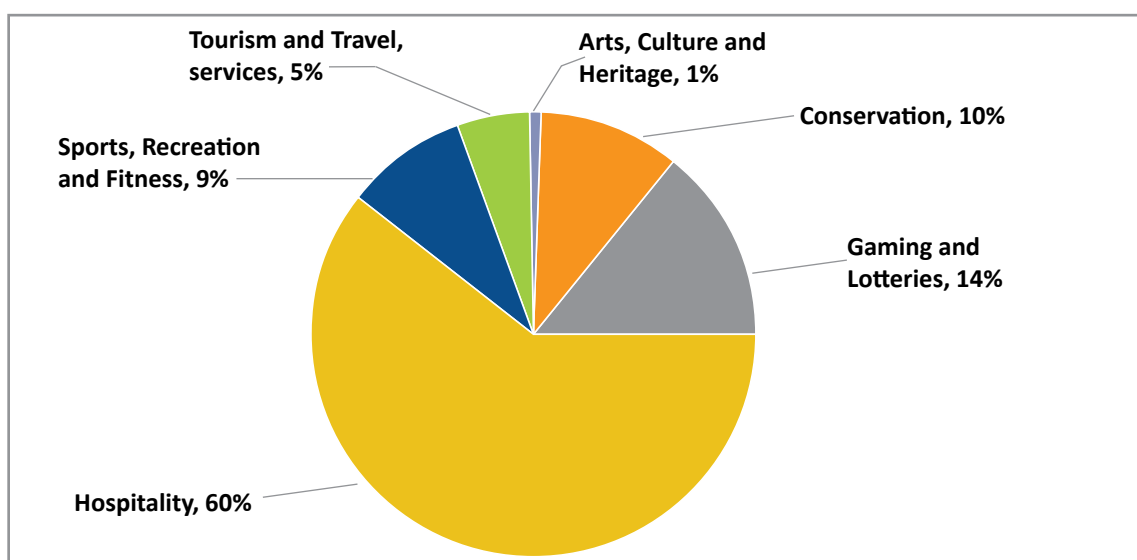
TABLE 6: NUMBER OF EMPLOYEES IN THE SECTOR

Sub-sector	2019/20	2020/21			2021/22		
	# of employees	# of employees	Growth/decline	% variance per year	# of employees	Growth/decline	% variance per year
Arts, Culture and Heritage	7 371	3 380	-3,991	-54.14%	2,069	-1,311	-38.79%
Conservation	17 513	18 384	871	4.97%	17,397	-987	-5.37%
Gaming and Lotteries	32 395	30 663	-1 732	-5.35%	23,597	-7,066	-23.04%
Hospitality	135 208	125 605	-9 603	-7.10%	102,452	-23,153	-18.43%
Sports, Recreation and Fitness	14 873	16 602	1 729	11.63%	16,037	-565	-3.40%
Tourism and Travel	16 679	16 299	-380	-2.28%	9,289	-7,010	-43.01%
Total	224 039	210 933	-13 106	-5.85%	170 841	-40 092	-19.01%

Source: CATHSSETA WSP data, 2021/22

The figure below provides a percentage breakdown of employees per sub-sector. Consistent with the table above, the majority of employees are employed in the Hospitality sub-sector (60%), followed by Gaming and Lotteries (14%).

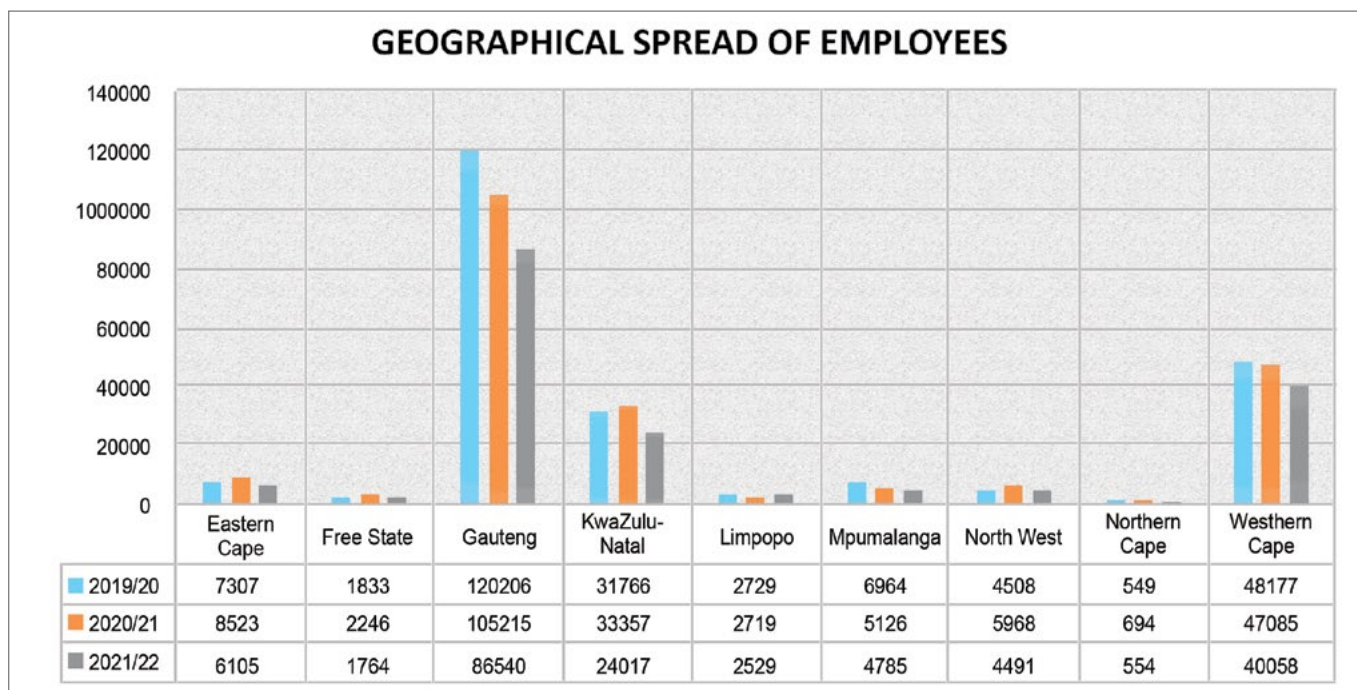
FIGURE 5: EMPLOYEES PER SUB-SECTOR



Source: CATHSSETA WSP data, 2021/22

The geographical spread of employees in the sector is shown in the figure below. The largest number of employees is in Gauteng (86 540) followed by Western Cape (40 058) and KwaZulu-Natal (24 017) which is in line with the distribution of entities. Employee distribution has decreased across most provinces.

FIGURE 6: EMPLOYEES IN THE SECTOR PER PROVINCE



Source: CATHSSETA WSP data, 2021/22

The figures below outline gender and race demographics of the sector by occupational category. Females make up 60% of employees in the sector, 46% of which are African females. Majority of employees fall into the Service and Sales occupational category (35%), followed by Elementary workers (20%) and Clerical Support workers (15%). An analysis of employees based on these demographic variables by sub-sector, indicates the following:

Arts, Culture and Heritage: Female employees represent 52% of the sub-sector. The majority of employees (25%), occupies Service and Sales positions, followed by 17% in Technical and Associate Professional positions. 58% of employees in the sub-sector are African, followed by 23% White employees.

Conservation: Females account for 44% of employees in the sub-sector. Most employees (43%), occupy professional positions, followed by employees in elementary occupations (24%). 80% of employees in the sub-sector are African, followed by 10% Coloured employees.

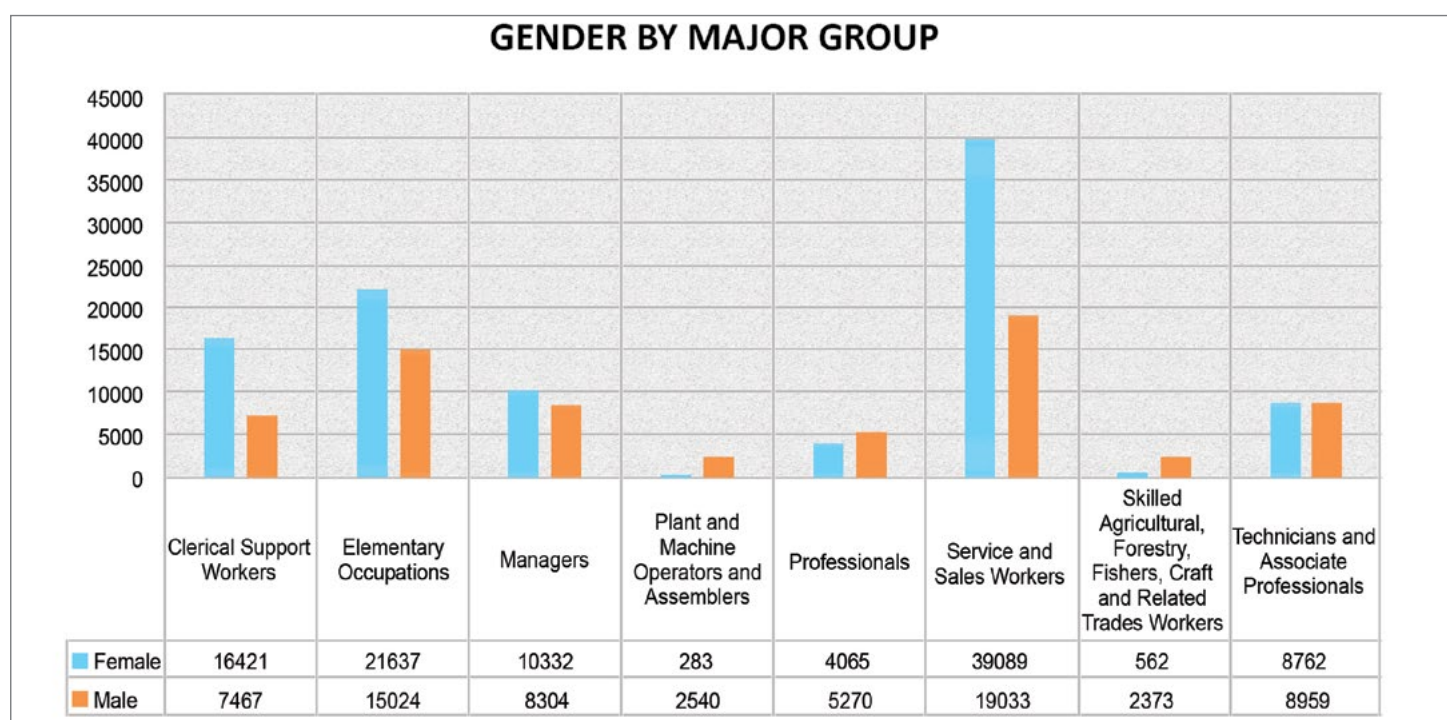
Gaming and Lotteries: The sub-sector employs 59% females. Most employees (43%) work as Clerical Support workers, followed by Service and Sales workers (24%). 81% of employees are African, followed by 7% Coloured employees.

Hospitality: The majority of employees in this sub-sector are female (65%). Service and Sales Workers (47%) account for the highest proportion of employees in the sub-sector, followed by Elementary workers (25%). The majority of employees are characterised as African, followed by 12% Coloured employees.

Sports, Recreation and Fitness: There is an equal split between male (50%) and female (50%) employees in the sub-sector. Most employees are Technicians and Associate Professionals (28%), followed by 22% Clerical Support Workers. Africans account for 61% of employees, followed by White employees at 22%.

Tourism and Travel: The majority of employees in this sub-sector (60%), are female. Clerical Support workers account for the highest proportion of employees (39%), followed by Managers at 15%. In terms of equity, 51% of employees are African, followed by White employees (28%).

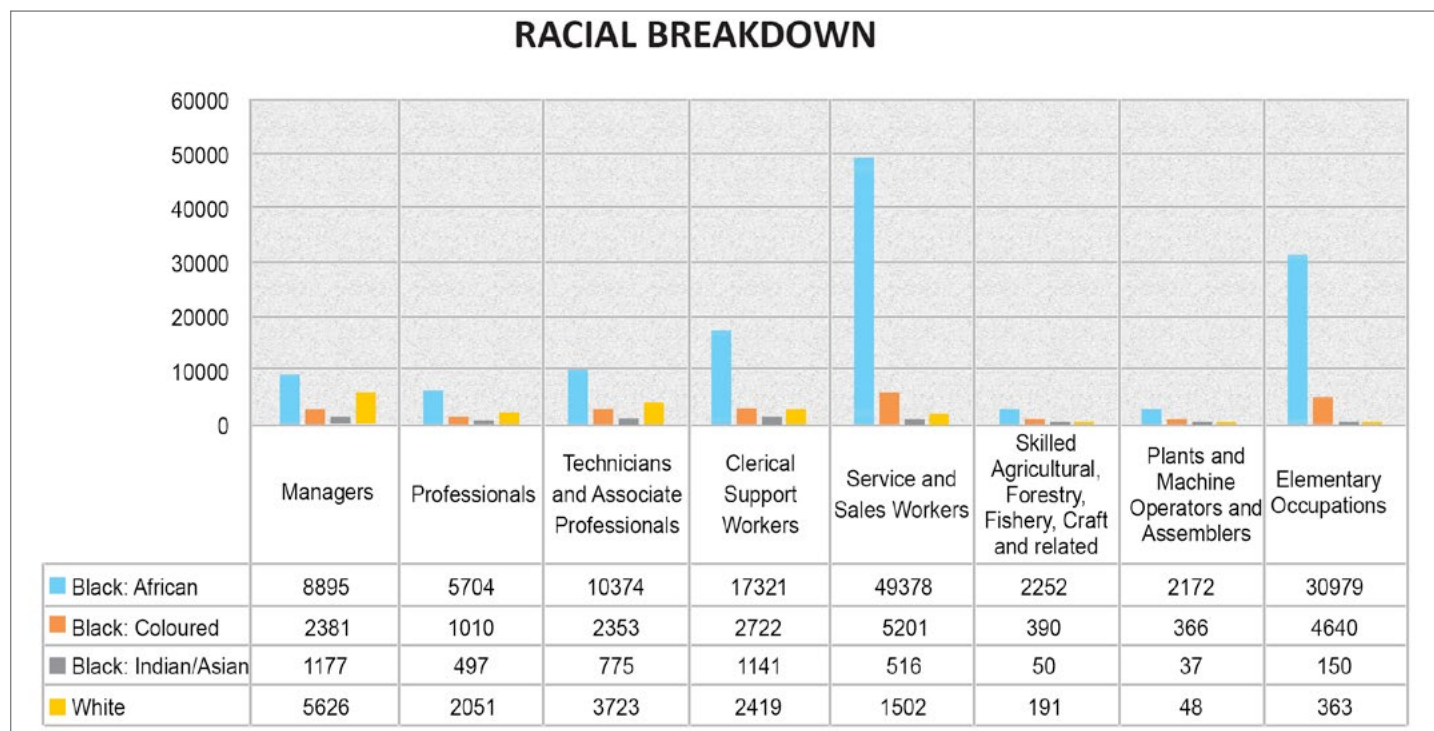
FIGURE 7: GENDER DEMOGRAPHICS OF EMPLOYEES PER MAJOR OFO GROUP



Source: CATHSSETA WSP data 2021/22

The race demographics of the sector are presented per sub-sector in the figure below. Similar to previous years, the majority of employees are African (76%), followed by Coloured employees (11%), White (10%) and Indian/Asian (3%).

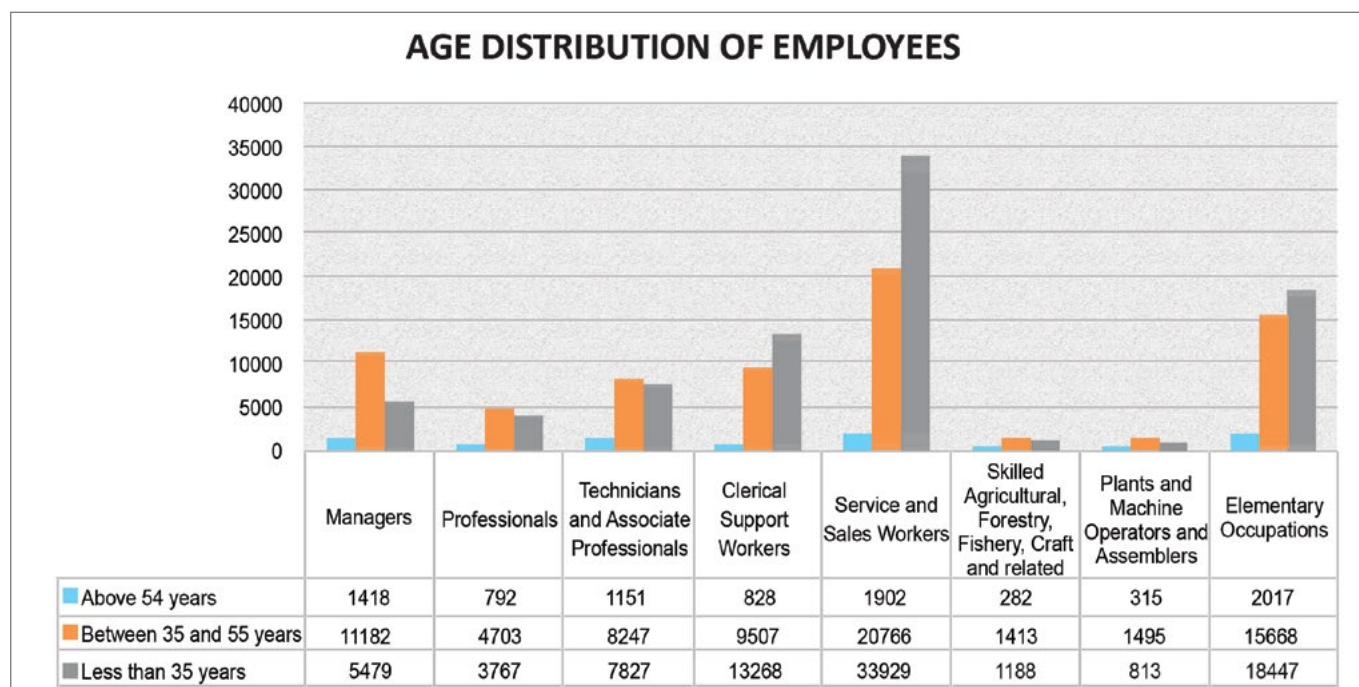
FIGURE 8: RACE DEMOGRAPHICS OF EMPLOYEES PER MAJOR OFO GROUP



Source: CATHSSETA WSP data 2021/22

The age distribution of employees outlined in the figure below illustrates that most employees in the sector (51%) are classified as youth (less than 35 years). This is followed by 44% of employees between 35 and 55 years, and 5% above 55 years. Most of the youth (40%) and employees between 35 and 55 years (28%) occupy Service and Sales positions.

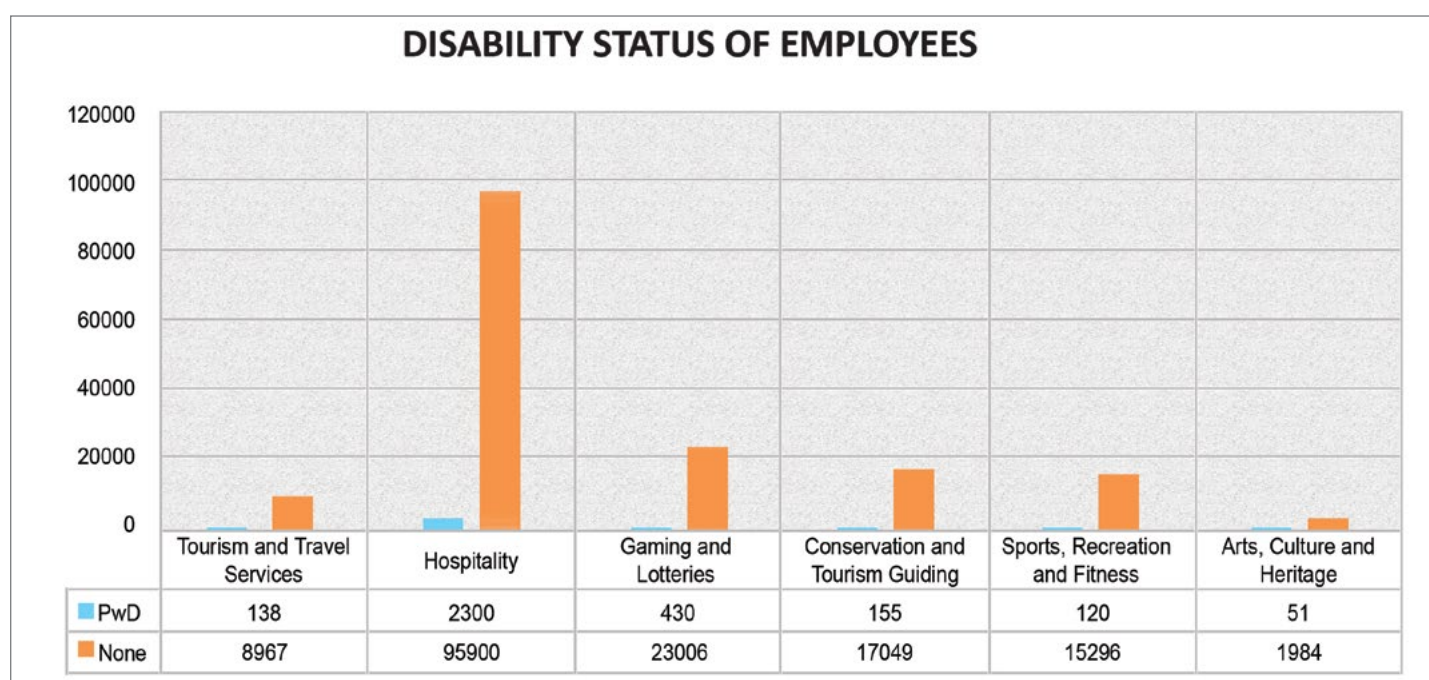
FIGURE 9: AGE DEMOGRAPHICS



Source: CATHSSETA WSP data 2021/22

The figure below outlines the number of people with disabilities in the sector. The percentage was calculated relative to the total number of employees in the sector. Overall, the number of people with disabilities employed, has decreased from 4 447 in the previous year, to 3 194 (0,19%), representing less than the 2% national target of the overall employment in the sector. Consistent with the results of overall employment in the sector, the majority of people with disabilities are in Service and Sales positions. The Hospitality sub-sector employs many people with disabilities (72%). The Arts, Culture and Heritage sub-sector employs the least number of people with disabilities.

FIGURE 10: DISABILITY STATUS OF EMPLOYEES WITHIN THE SECTOR



Source: CATHSSETA WSP data, 2021/22

1.8. Implications for Skills Planning

The composition of the sector shows that the bulk of entities (96%) are small (0-49 employees), indicating a need for CATHSSETA to continue supporting and prioritising SMME development in the sector. Significant strides have been made towards greater representation and overall transformation in the sector. However, whilst 76% of employees in the sector are African, 46% of whom are African females, the vast majority are employed as Service and Sales workers, illustrating the need for further education and training to respond to transformational issues. There is a need to develop entrepreneurial and managerial skills across the sector, particularly amongst previously disadvantaged groups, to enable transformation within the sector. In addition, 51% of employees are classified as youth (less than 35); indicating that CATHSSETA needs to prioritise and support youth development in the various sub-sectors. Lastly, the number of people with disabilities has decreased from 4 447 in the previous year, to 3 194 (0.19%). CATHSSETA should consider entering into partnerships with NGOs and CBOs that work with people with disabilities to increase access to skills development opportunities for people with disabilities.



Overall, COVID-19 has gravely affected the economic performance of the sector. The SETA needs to conduct an in-depth study on the effects of COVID-19 on each of the CATHSSETA sub-sectors, and its implication for skills development.

1.9. Conclusion

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

CHAPTER 2: KEY SKILLS ISSUES

2.1. Introduction

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

2.2. Factors Affecting Skills Demand And Supply

CATHSSETA has identified change drivers within its six sub-sectors which are related to the way in which work is carried out in the said sub-sectors. The identified change drivers are as follows: the COVID-19 Pandemic, Technology and the Digital Divide, the Gig Economy and the Green Economy.

2.2.1. COVID- 19 Pandemic

As has occurred with the other sectors of the economy, CATHSSETA sub-sectors have been gravely impacted by the national lockdown and international travel restrictions. In the Arts, Culture and Heritage, Venue-based sectors, such as museums, performing arts, live music, festivals etc., are the hardest hit by social distancing measures. The abrupt drop in revenues put the financial sustainability of the sub-sector at risk. In anticipation of the massive challenges faced by the sector, the Department of Sport, Arts and Culture announced a relief fund totalling R150 million to soften the economic impact of the pandemic on the sector. Some cultural and creative sectors, such as online content platforms, have however profited from the increased demand for cultural content streaming during lockdown. With the lockdown, many public and private providers moved content online, to ensure business continuity and satisfy the increased demand for streaming cultural content (OECD, 2020).

The Tourism and Travel sub-sector is one of the worst affected industries globally. The slowdown in domestic and international travel has also had multiplier effects on the performance of other CATHSSETA sub-sectors. It is projected that, even once the outbreak is over it could take up to 10 months for the Tourism and Travel sub-sector to recover from the impact of the pandemic. While the country's borders are open to welcome international visitors, the international source market has banned travelling to South Africa due to the new variant of the COVID-19. However, the sector performance is improving and displaying higher economic activity despite several countries still not allowing travel to South Africa.

Disruptions in the Tourism and Travel sub-sector have also impacted Conservation, as the sub-sector almost entirely relies on tourism and donor funding. With the restrictions on travel, private game reserves have no other means of funds besides tourists/guests. In addition, the hunting industry has had to cancel and postponed major hunting trips and events. This has had an impact both on the economic performance of the sub-sector, and on wildlife conservation, as trophy hunting currently contributes more to wildlife conservation in South Africa than any of the other conservation fees. The wildlife economy is not only key to the conservation of wildlife and their habitats, but equally as important to the livelihoods of people employed in the sector. Many of the people employed in this sub-sector live in rural areas where they only have the wildlife economy to depend on for their livelihood.



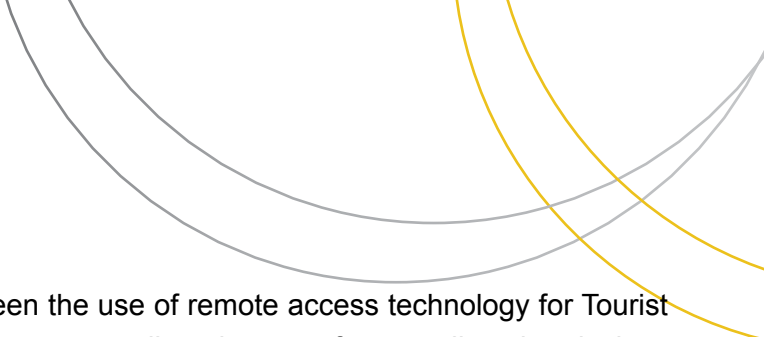
The Hospitality sub-sector is dealing with unprecedented crisis due to the disruption caused by the pandemic. Apart from some catering services for essential workers and quarantine facilities, the Hospitality sub-sector was brought to a halt during hard lockdown. The challenges created by COVID-19 impacted almost every part of the Hospitality sub-sector operations, from room occupancy levels and staffing plans to food and beverage provisioning. As a result, employees had to be temporarily laid off and working hours were decreased. In the Gaming and Lotteries sub-sector, horse racing and sports events have been cancelled or postponed indefinitely since the coronavirus outbreak, and other gambling establishments have been closed until further notice. The global suspension of most sporting events has left punters without live games to bet on, aside from reruns of filmed matches. The knock-on effect is that sport betting, which accounts for most Industry revenue, has crashed to almost nil (I-Gaming Business, 2020). Similarly, the Sport, Recreation and Fitness sub-sector has been severely impacted by national lockdown restrictions. Under lockdown restrictions, all sporting events have had to be suspended or cancelled, and there is growing concern that the industry and its employees may struggle to recover, even after the lockdown.

Whilst the overall immediate economic impact of COVID-19 has been well documented, a more detailed analysis for each of the CATHSSETA sub-sectors is not readily available, especially in relation to its implication on the post-school education and training system. As a result, the SETA is embarking on a research study to examine the impact of COVID-19 on the sector and its implications on the supply and demand of skills.

2.2.2. Technology and the Digital Divide

Technological advancements and the Fourth Industrial Revolution (4IR) have played an important role in all the CATHSSETA sub-sectors in the last decade. Technology has helped reduce costs, enhance operational efficiency, and improve services and customer experience. As an extension of these technological developments, 4IR also represents a fundamental change in the way in which people live and work. These advances in human development are merging the physical, digital, and biological worlds in ways that create huge potential for the sector. The exact impact of the 4IR is difficult to predict, given that we are still in the early stages of this revolution. However, industries across South Africa are considering the ways in which new technological developments can improve business practice, which calls for a reform in regulatory frameworks to ensure the use of technology is fair, responsible and considers the country's broader socio-economic objectives. In the context of skills development, South Africa has an opportunity to reshape the composition of the sector by leveraging opportunities presented by technological advancements and 4IR to develop what has previously been deemed low-end skills to match the demands of 4IR. The 4IR has forced us to re-examine and re-develop the skills development system to ensure that it is fit-for-purpose to prepare the workforce for the new world of work and the advances and adjustments that 4IR brings with it.

The internet has an impact on all CATHSSETA's sub-sectors. A customer's first experience with a business is via a visit to the website or social media page of the business in question. It is vital for a business to effectively utilise online advertising, social media, and online purchasing to help convenience their customers across all CATHSSETA sub-sectors. Recognition technology is already being used in some hotels to allow access to rooms via fingerprint recognition, or to allow for semi-contactless check-outs. In the Tourism and Travel and Hospitality sub-sectors, technological advances have resulted in the use of Electronic Tourist passes, Global IT booking systems, accommodation booking sites and applications, such as: Trivago, Airbnb,



TripAdvisor, etc. The Tourism and Travel industry has seen the use of remote access technology for Tourist Guides to easily access information on key points of interest as well as the use of remote listening devices that Tourist Guides use to guide visitors. Artificial Intelligence (AI) systems in particular, are forecasted to have a significant impact on the Gaming and Lotteries sub-sector. This includes the use of AI-based nudging techniques to influence punters' decision making, and profile individuals to provide personalised advertising for gambling services and products, allowing AI and swarm intelligence to track, predict and control human behaviour (Fong, 2018). This will minimise human interaction and interference, allowing experts to analyse customer behaviour and marketing insights.

The Sport, Recreation and Fitness sub-sector has also become more technologically driven, with advances in gym equipment, fitness and health mobile applications, electronic media, and even in the way sports events are covered. Wearable technology is becoming ingrained in professional sports, allowing adverse metrics to be considered and utilised within training, thus permitting real-time decisions. The use of virtual fitness instructors within the field of recreation will likely see a decrease in the use of fitness instructors and fitness facilities. In the Conservation sub-sector, curators and conservation biologists require innovative solutions for information management. As a result, there is a growing demand for cross-cutting transdisciplinary skills. This calls for tailored professional development programmes and ICT strategies as well as plans to support traditional higher education curricula. In the Arts, Culture and Heritage industry there is movement towards the increased use of digital communication in editing and post-production tasks, which will likely impact the human resources required. The impact of music and film streaming, YouTube channels and the emergence of apps, has threatened the sustainability of the music industry.

The Department of Communications and Digital Technologies published the National Digital and Future Skills Strategy in August 2020. The Strategy seeks to address the need for mechanisms to foster digital skills development across South Africa, at early childhood development, schooling and post-school education and training levels, recognising that digital skills are necessary for economic growth and social development. It sets out different levels at which digital skills should be given attention, and many mechanisms for advancing digital skills. The Strategy calls on the education sectors, inclusive of SETAs, to build a strong focus and invest in digital skills, as well as invest in the development of digital innovation skills in the sector.

There has also been an increased demand for alternative approaches to education provision in the form of e-learning. CATHSSETA needs to take the time to frame an approach on e-learning for the sector and conceptualise an e-learning policy and framework for accreditation and implementation in the sector. The SETA will need to move with speed and agility as demand increases. This is necessary both for economic sustainability and to unlock future entrepreneurs who will assist in economic stimulation (Biz Community, 2020).

With that said, South Africa's post-education system is complex, with historical inequalities. Most of the country's learners come from disadvantaged backgrounds and there is a huge digital divide to be considered. From an economic perspective the "divide" is related to lack of affordability due to low disposable income, while geographical factors are related to lack of infrastructure support. The 2019 General Household Survey conducted by Stats SA revealed that just over 60% of households in South Africa have access to or use the



internet (Stat SA, 2019). Most of those households were reported in the more developed provinces such as Gauteng and the Western Cape, where over 70% of households had access to the internet, while the more rural provinces such as Limpopo and the Eastern Cape reported numbers below 60% (Stats SA, 2019).

2.2.3. Gig Economy

The sector has seen a growing trend in the 'gig economy'. The gig economy is defined as a labour market characterised by freelance, flexible, on-demand work rather than the more traditional nine-to-five working model. The gig economy is made up of three main components - the independent workers paid by the gig (i.e., a task or a project) as opposed to those workers who receive a salary or hourly wage; the consumers who need a specific service, for example, a ride to their next destination, or a particular item delivered; and the companies that connect the worker to the consumer in a direct manner, including app-based technology platforms. Companies such as Uber, Airbnb, Takealot, Bookings.com or Mr Delivery act as the medium through which the worker is connected to – and ultimately paid by – the consumer. These companies make it easier for workers to find a quick, temporary job (i.e., a gig), which can include any kind of work, from a musical performance to plumbing.

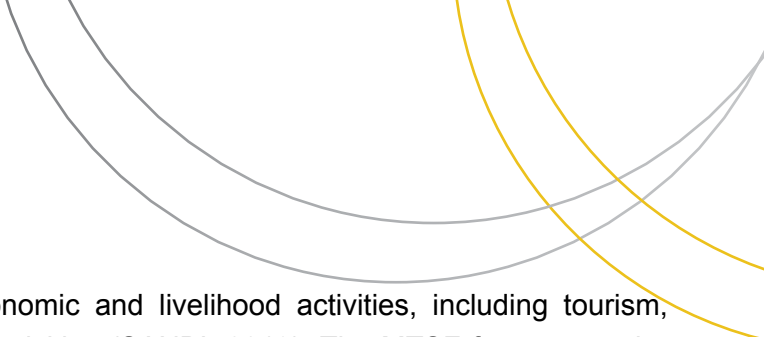
The growth of the gig workforce in the past decade is driven by the development of new technologies that enable transactions directly between providers and consumers, and the difficulty of finding traditional, stable jobs. On the one hand, app-based technology platforms are replacing people as middlemen to connect consumers and producers quickly and easily, allowing individuals to perform a variety of tasks for complete strangers based on real-time demand.

One of the characteristics of the CATHSSETA sector is that it is highly seasonal. Gig workers are especially helpful in the Hospitality and Tourism and Travel sub-sector when it comes to the staffing approach in the high and low seasons. The gig economy has already changed the sector in more ways than one. People are spending more money on travel and restaurants – cue ride-sharing services such as Uber, food-delivery services such as Mr Delivery and Uber Eats. (Texas Hotel and Lodging Association, 2017).

CATHSSETA needs to position itself to respond to the needs of the changing nature of the workforce in the sector. Skills interventions need to respond to the virtual and fluid requirements emanating from careers in the gig economy. The sector therefore needs to move beyond traditional methods of up-skilling and training employees and adopt more flexible and easily accessible modes of learning provision. Through stakeholder engagements/workshops, the SETA in collaboration with the sector, needs to set out a plan on how to increase equitable access to skills development opportunities for the modern labour market in the gig economy.

2.2.4. Green Economy

There have been increased efforts to control the effects of climate change by creating environmental awareness and promoting sustainable development through the Green Economy. The NDP 2030 Vision states that, by 2030, South Africa will transition to a more environmentally sustainable, climate change resilient country, and will become a low-carbon economy and just society (NDP, 2012). South Africa is well-known for its rich biodiversity and abundant wildlife; but climate change poses a risk to these natural treasures, as well as to the people of the country.



The country depends on healthy ecosystems for economic and livelihood activities, including tourism, and several income-generating and subsistence-level activities (SANBI, 2013). The MTSF focuses on the implementation of, and transition to, an environmentally sustainable Green Economy. Through the Green Economy, South Africa can benefit from the opportunities opened by global and local green economic activity, eco-innovations, and green jobs. For instance, the greening of sports events has most notably reduced waste and energy use, reduced carbon emissions and helped in public education (MTSF, 2014). In addition, there are substantial job creation opportunities in programmes contributing to biodiversity conservation. 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 (SSP Consultation Sessions, 2019). These are some of the substantial occupations supporting the Green Economy.

2.3. Implications for Skills Planning in the Sector

Digital transformation has been accelerated massively due to the Pandemic, and therefore equipping people with digital skills has suddenly become a critical need. Indications are that the 4IR requires high-end skills in data management and computer-programming and would drive a reduction in low-skills jobs or repetitive tasks.

CATHSSETA needs to reposition itself to equip the sector with not only digital skills but explore innovative approaches to training delivery. This will also include a review of qualifications, training provision and accreditation, to meet the changing nature of the sector. E-learning has shown that it is possible for a country such as South Africa to deliver this form of learning, which is far cheaper and has potential for a wider reach than physical learning institutions. Therefore, ensuring that students have online access is essential. The complexity of implementing e-learning requires additional research. This will assist the SETA in the design and identification of conditions and practices in which e-learning can be used effectively in the PSET system. Such research will help inform which of the technology requirements need to be considered, which subject domains are possible for e-learning, the role of lecturers, what assessment approaches would work best for the sector, and industry best practices.

The SETA, in partnership with sector stakeholders, needs to embark on career guidance initiatives, in order to ensure that the youth is guided to new and emerging careers in the sector. Based on the factors outlined above and desktop research, the following emerging occupations have been identified per sub-sector. The list will be reviewed subject to findings from the research on the 4IR.

TABLE 7: EMERGING OCCUPATIONS:

Sub-sector	Emerging Occupations
Arts, Culture and Heritage	Audio-Visual 3D Technicians; Application Development Practitioners; Social Media Specialists; Heritage Multimedia Specialists; Repatriation Artists; Marketing Practitioners; Digital Lighting Practitioners; On-Site Nurses; Digital Media Strategists; Information Technology Technicians; Information Technology Support; Information Technology Recruiter, Human Resources Partner, Talent Acquisition Specialist, Human Resources Business Partner
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
Gaming and Lotteries	Application Development Managers; Customer Relations; Data Analysts and Marketing Data Analysts; Social Media Specialists; Website Designers; Customer Relations Specialists; Industrial Psychologists; CCTV Technicians; Data Feeds Managers; Digital Artists; ICT Developers; Emergency Service and Rescue Officials; Gaming Supervisors, Fraud and Risk Analyst, Senior Data Engineer, Test Engineer, Retention Manager, Network Architect
Hospitality	Social Media Specialists; Operations Managers; Trends/Market Analysts; Health and Safety Auditors; Food Safety Assurance; Information Technology Specialists; Administrative Maintenance; Bar Managers; Food and Beverage Scientists; Online Bookings Specialists; Dieticians; Computer Network and Systems Engineers; Internet of Things Specialist
Sports, Recreation and Fitness	Risk Managers; Payroll Managers; Sports Psychologists; Sports Agents; Event and Project Management; Sports Lawyers; Media Coordinators; Fitness Management; Exercise Physiology, Disease Control Specialists; Sports Copywriter and Social Media Manager
Tourism and Travel	Business Development Managers, Guest Relations Officers; Communication Strategists; Legal Tourism Consultants; Marketing Practitioners; Travel Accommodation Inspectors; Travel Agency Managers; Business Analysts; Software Developers; Applications Developers; Online Travel Agent, Influencer Marketer, Smart Technology Developer, Sustainability Consultant

Source: CATHSSETA Stakeholders consultations, 2019 - 2020

2.4. Policy Frameworks Affecting Skills Demand and Supply

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

2.4.1. White Paper on Post-school Education and Training

The White Paper sets out strategies for an improved post-school education and training system that will meet the needs of South Africa by 2030. A sharpened focus on the SETAs is proposed, limiting the scope of a SETA to the training of employees within the relevant sector and unemployed persons wishing to enter the sector. It is proposed that SETAs will provide supply-side data towards the development of a national skills planning system. The focus of the SETA's Mandatory Grant will be exclusively on gathering accurate data on sector skills needs while sector training and training provider capacity will be catered for through Discretionary Grant.

2.4.2. National Development Plan, 2030 (MDP)

The NDP identifies skills development and education as a catalyst for economic development and growth. The NDP correctly positions skills development and education as a necessity for the empowerment of people. Education must enable people to define their identity, take control of their own lives, raise healthy families, and play a meaningful role in broader societal development.

The NDP acknowledges that education, training, and innovation are not the only solutions to our common national problems. Rather, education is critical in building our national capacity to solve problems. Addressing our national training and educational expectations requires harnessing the capacity of different provider institutions so that they can be effective in delivering their respective mandates.

2.4.3. National Skills Development Plan, 2030 (NSDP)

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

2.4.4. National Skills Accord (NSA)

The National Skills Accord established a partnership between DHET, communities, organised business, and labour, aimed at promoting common skills development and training priorities. These representatives of business, organised labour, the community constituency, and government have agreed to partnerships in order to achieve the New Growth Path target of five million new jobs by 2020. A reflection and review of the target, in line with the CATHSSETA sectors, becomes a baseline for the 5-year trajectory.

2.4.5. Strategic Integrated Projects (SIPs)

CATHSSETA's approach to SIPs funding has been integrated into the Discretionary Grant framework. The skills required for the delivery of SIPs are presented by the DHET. CATHSSETA has identified the following four occupations, which will be addressed by supporting learners through WIL and internship programmes: Environmental Manager; Programme or Project Administrator's Assistant; Truck Driver and Handyman (persons).

2.4.6. New Growth Path

The Plan sets out key job drivers (areas that have the potential to create employment) and priority sectors which will receive focus over the next few years. Tourism is one such sector identified as a potential growth area. In order to develop these sectors, focus is on improving education and skills development, enterprise development, promoting small business and encouraging entrepreneurship. CATHSSETA will play an important role in developing skills through developing and improving qualifications relevant to the sector, as well as supporting the development and sustainability of small business in the sector.

2.4.7. Economic Reconstruction and Recovery Plan (ERRP)

The South African government promulgated the ERRP to directly respond to the immediate economic impact the COVID-19 Pandemic on the South African economy. The Plan sets out a reconstruction and recovery plan for the South African economy aimed at stimulating equitable and inclusive growth. Skills development is highlighted as one of the key enablers for the successful implementation and realisation of the Plan. The ERRP also highlights the need to contribute to the prevention of job losses through the expansion of reskilling and retraining of workers.

In response to the Plan, DHET developed an Economic Recovery Skills Strategy (ERSS). The skills strategy is demand led as well as, in the immediate term, focus SETA skills training on addressing the impact of COVID-19. Based on the draft ERSS, the strategy sets out a core of interventions to ensure the effective implementation of the ERRP. In the draft ERSS, DHET identifies nine (9) priority interventions to be implemented in the short-term to accelerate access to income-earning opportunities by young people. The following interventions have been identified:

1. Embedding skills planning into sectoral processes;
2. Updating or amending technical and vocational education programmes;
3. Increased access to programmes resulting in qualifications in priority sectors;
4. Access to targeted skills programmes;
5. Access to workplace experience;
6. Supporting entrepreneurship and innovation;
7. Retraining/up-skilling of employees to preserve jobs;
8. Meeting demand outlined in the List of Critical Occupations; and
9. National Pathway Management Network.

In anticipation of the final ERSS document, CATHSSETA needs to start working towards aligning its strategy with the priority interventions and related actions set out in the ERSS to respond to this demand in a swift manner given the urgency to mitigate the effects of COVID-19 on the sector.

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

TABLE 8: SUB-SECTORAL STRATEGIES AND PLANS

National Plans or Strategies	Implications for Skills Planning
Arts, Culture and Heritage	
National Policy on South African Living Heritage	The Policy stresses the importance of training courses in leadership and management having their fundamentals based on Ubuntu, which will in turn be promoted by various stakeholders. CATHSSETA focuses on management development programmes to assist in this drive to train leaders and managers.
Department of Arts and Culture Strategy 2012/13 (Mzansi Golden Economy)	DAC and CATHSSETA have identified a need for the provision of a co-ordinated skills development and training initiative, as part of up-skilling local art organisations to host events, as well as training in the development of quality products and services for tourism consumption. The heritage sector requires the development of skills for the conservation and protection of heritage estates and assets, as well as skills appertaining to the management of Cultural Heritage Tourism. It is, therefore, imperative for CATHSSETA and DAC to work towards developing the required skills in heritage resource management, amongst other interventions.
National Heritage and Cultural Tourism Strategy 2012	The strategy clearly illustrates the significant deficiencies of skills and qualifications available in heritage conservation and management. It calls for skills development and training in heritage and tourism to be matched with the availability of employment opportunities to absorb the skilled labour force. Through the QCTO process, CATHSSETA is making a concerted effort to ensure the relevance of qualifications that cater for its sub-sectors. These efforts are also aimed at encompassing elements of tourism in order to deepen understanding of the relationship between the sectors of the Arts, Culture and Heritage, and the Tourism sector.
Conservation	
The National Protected Area Expansion Strategy, 2016	This Strategy aims to achieve cost-effective protected area expansion to encourage ecological sustainability and increased resilience to climate change. The implications of this for CATHSSETA is the need to focus on capacity-building through skills development programmes and Initiatives to meet the needs of the sector. CATHSSETA has identified some of the occupational requirements within the Conservation and Biodiversity sectors as occupational shortages and these are, therefore, prioritised in Skills Development initiatives.
National Climate Change Adaptation Strategy, 2019	This strategy stipulates that government must ensure that a holistic understanding of climate change and related issues are included in all relevant aspects of formal education curricula. This will enable all SETAs to add climate change to priority Skills Development programmes in the formal, informal, and non-formal sectors of the education and training system, and establish incentives for research and training, such as bursaries, in order to encourage students and scholars to research and study climate change. The role that CATHSSETA can play is in the development and review of relevant qualifications, as well as in the funding of post-graduate scholars who will conduct research into the sub-sector.
Department of Environmental Affairs Strategy, 2019	The strategy places significant emphasis on CATHSSETA, which is tasked with skills development for conservation bodies and agencies, such as the South African National Biodiversity Institute (SANBI), South African National Parks (SANParks), semi-independent provincial agencies and local government, including the Department of Environmental Affairs and provincial departments. These and other entities operate under a new Conservation Paradigm, in which the protection of biodiversity and development planning must be integrated. However, few have been trained in this new paradigm and, thus, CATHSSETA's role is to develop training initiatives.

Hospitality	
National Development Plan 2030	The Plan sets a target of training 30 000 Artisans by 2030. This falls directly into CATHSSETA's mandate of Artisan Development. To address this need, CATHSSETA, together with the QCTO, has completed the review and registration of the Chef qualification as a trade. Successful registration and upgrade of the Chef trade with QCTO from NQF level 4 to NQF level 5.
Immigrations Regulations Act of 2002	Amendments to the Immigrations Regulations Act of 2002 resulted in new visa regulations being implemented in 2015. This brought about the repeal of the quota for exceptional skills work permits and the introduction of the category of critical skills work visa, which assists in attracting critical skills to the country. The critical skills work visa allows the sector to attract professionals to the country who have the critical skills needed that are likely to advance national interests.
Sectoral Determination 14: Hospitality	Sectoral determination for the Hospitality sector requires that the minimum wage offered by employers with 10 or less employees, be R2 959.35, and that, for employers with more than 10 employees, be R3 298.52. For CATHSSETA, this translates into a need to ensure that funding criteria is in line with the Department of Labour in terms of regulated minimum wage for the sector.
Gaming and Lotteries	
Lotteries Act 32 of 2013	The Lotteries Act regulates lottery activities and provides the basic framework for the management and operation of the National Lottery. Priorities for distributing funds include the provision of educational facilities designed to enhance literacy, vocational training and mentoring for skills development that include people with disabilities. All of these are specific areas of focus within the NSDS III.
Sport, Recreation and Fitness	
National Sport and Recreation Plan (NSRP), 2012	The overarching focus of the three values of the NSRP is to improve access to, and participation in, sports, as well as to develop talent for the sport and recreation Sector. For CATHSSETA, this translates into developing training and educational initiatives, aimed at developing sports and recreation personnel, particularly coaches and administrative and technical officials. The focus also encompasses developing financial, marketing and media skills. This can be achieved through accredited education and training programmes.
South African Coaching Framework	The focus will be on Recognition of Prior Learning (RPL) of coaches; accreditation support for national federations, and also on the training of coach-developers as facilitators, assessors and moderators.
Sports Tourism Strategy	The aim is to broaden capacity-building initiatives within the sports industry to encompass elements of Tourism, so as to deepen the understanding of the Sports Tourism element in sports development. CATHSSETA will work with its partners, such as the higher education institutions (HEIs), to ensure that there are sports tourism qualifications at all levels. CATHSSETA will also develop a database of volunteers, as required, in the NSRP and will ensure that these volunteers are trained for the success of international sporting events in South Africa.

Tourism and Travel	
National Tourism Sector Strategy, 2020	The strategic objectives are organised into three themes, namely, to grow the tourism sector and economy, to enhance visitor experience, and to achieve sustainability and governance. Some of the key focus areas within these themes include people development and relevant capacity-building. The role of CATHSSETA is, therefore, to identify training needs and to offer training programmes that are aligned to the needs of the sector, with the emphasis being on developing and improving skills within the sector.
Tourism Human Resource Development Strategy (THRD) Strategy 2017- 2027	The THRD Strategy is aligned to both the National Tourism Sector Strategy 2020 (NTSS) and to the NSDS III (DHET, 2015). CATHSSETA's role is to be part of the working groups that will ensure engagement of the Tourism, Hospitality and Conservation Sectors, concerning THRD matters. The role of CATHSSETA is to further assist in addressing Workplace Skills gaps, particularly the strengthening of “soft skills”, in collaboration with other actors, such as Umalusi, TVET Colleges and others.
National Rural Tourism Strategy, 2012	Informed by the National Tourism Sector Strategy and the Domestic Tourism Growth Strategy, this strategy prioritises tourism development in rural economies, by supporting Enterprise development, skills development, and training initiatives in the tourism sector. CATHSSETA, through its partnerships and strategic alignments, offers positive support for rural development initiatives, through special projects, as well as extending its operational presence across the various regions.
Tourism Act, 2014	The Act regulates the Tourist Guide profession and acknowledges the value and importance of the Tourist Guide sector. It also provides for the registering of Tourist Guides, thereby recognising it as a profession with a defined career path. CATHSSETA, together with relevant partners, is responsible for identifying the training needs, as well as the certification and registration needs of the Tourist Guide sector. CATHSSETA can also assist with the development of Curricula and the implementation of RPL pilot projects, especially on Tourist Guides, as outlined by the THRD Strategy.

2.5. Conclusion

This chapter has identified factors that are driving change in the sector, such as the COVID-19 Pandemic, Technology and the Digital Divide, and the influence which these have on skills demand and supply. Changes in occupational patterns and structures are reflected in the profile of the skills that are required by employers in the sector. This reveals a need for human resources with increased proficiency in the use of technology, and greater cross-cutting industry skills and knowledge. The 4IR is anticipated to reshape skills, with the creation of new jobs as well as losses. CATHSSETA needs to review future skills in view of this revolution.

CHAPTER 3: OCCUPATIONAL SHORTAGES AND SKILLS GAPS

3.1. Introduction

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

- Occupational shortages and skills gaps;
- Extent and nature of supply; and
- Sectoral Priority Occupations and Interventions list (previously PIVOTAL list).

The methodology employed draws on a combination of both quantitative and qualitative research techniques. The quantitative approach includes the collection and analysis of data submitted by employers through the Mandatory Grant application process, data sourced from the DHET, as well as data from the CATHSSETA Quarterly Monitoring Reports. Cross-sectional analysis has been conducted to establish vacancies and occupations that are hard to fill, number of enrolments and graduations, as well as other supply-side information. Qualitative methods employed include focus group sessions, consultative sessions with industry stakeholders and key informant responses from all sub-sectors. The relevant qualitative findings, where available, have been compared to the quantitative results and the results are presented in the sections that follow.

3.2. Sectoral Occupational Demand

3.2.1. Hard-to-fill Vacancies

Hard-to-fill-Vacancies (HTFVs) are defined as occupations that take longer than a year to find suitably experienced and qualified candidates to fill. The table below depicts the identified HTFVs by sub-sector. Not all sub-sectors had occupations vacant for longer than a year, as a result the list is extended to include occupations vacant for a period of 6 months to a year. The HTFVs listed are classified from 1 to 3 according to degree of scarcity, by employers who submitted the information.

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

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Arts, Culture and Heritage	2019-216601	Digital Artist	2	Lack of candidates with the required work experience
Conservation	2019-262202	Biodiversity Information Management Specialist	2	Lack of candidates with the required work experience
	2019-122301	Research and Development Manager	2	Lack of candidates with the required work experience
	2019-342302	Adventure Safari Guide	6	Lack of candidates with the required work experience

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Gaming and Lotteries	2019-421203	Betting Operator	80	High staff turnover
	2019-242211	Information Systems Auditor	10	Lack of suitably qualified candidates
	2019-215202	Information Technologist	15	Lack of suitably qualified candidates
Hospitality	2019-122103	Marketing Manager	2	Lack of candidates with the required work experience
	2019-134915	Abattoir Manager	2	Lack of suitably qualified candidates
	2019-134916	Non-Manufacturing Operations Foreman	2	Geographical location of the position is not favourable/remote
	2019-252301	Computer Network and Systems Engineer	6	High staff turnover
	2019-141101	Hotel or Motel Manager	4	Geographical location of the position is not favourable/remote
				Lack of suitably qualified candidates
	2019-141201	Restaurant Manager	31	Geographical location of the position is not favourable/remote
				Lack of suitably qualified candidates
	2019-142103	Shop Manager	3	Lack of suitably qualified candidates
	2019-143108	Facility Centre Manager	2	Geographical location of the position is not favourable/remote
				Lack of candidates with the required work experience
	2019-243103	Marketing Consultant	2	Lack of suitably qualified candidates
	2019-251301	Digital Media Specialist	2	Salary considerations
	2019-343401	Chef	4	Lack of candidates with the required work experience
				Lack of suitably qualified candidates
	2019-422401	Hotel or Motel Receptionist	4	Lack of candidates with the required work experience
	2019-432101	Stock Control Clerk	4	Lack of suitably qualified candidates
	2019-513101	Food and Beverage Attendant	10	Lack of candidates with the required work experience
	2019-513201	Bar Attendant	2	Lack of candidates with the required work experience
	2019-515103	Commercial Housekeeper	6	Lack of suitably qualified candidates
				Lack of candidates with the required work experience
	2019-681202	Pastry Cook	2	Lack of suitably qualified candidates
	2019-862202	Handy Man	2	Lack of suitably qualified candidates
Sport, Recreation, and Fitness	2019-226905	Biokinetics	8	Geographical location of the position is not favourable/remote
	2019-143107	Fitness Centre Manager	2	Lack of candidates with the required work experience
	2019-342301	Fitness Instructor	559	Lack of suitably qualified candidates

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Tourism and Travel	2019-251102	Data Scientist	2	Lack of suitably qualified candidates
	2019-242101	Business Analyst	96	Lack of candidates with the required work experience
				Lack of suitably qualified candidates
	2019-352104	Television Control Room Technician	2	Lack of suitably qualified candidates

Source: CATHSSETA WSP data, 2021/22

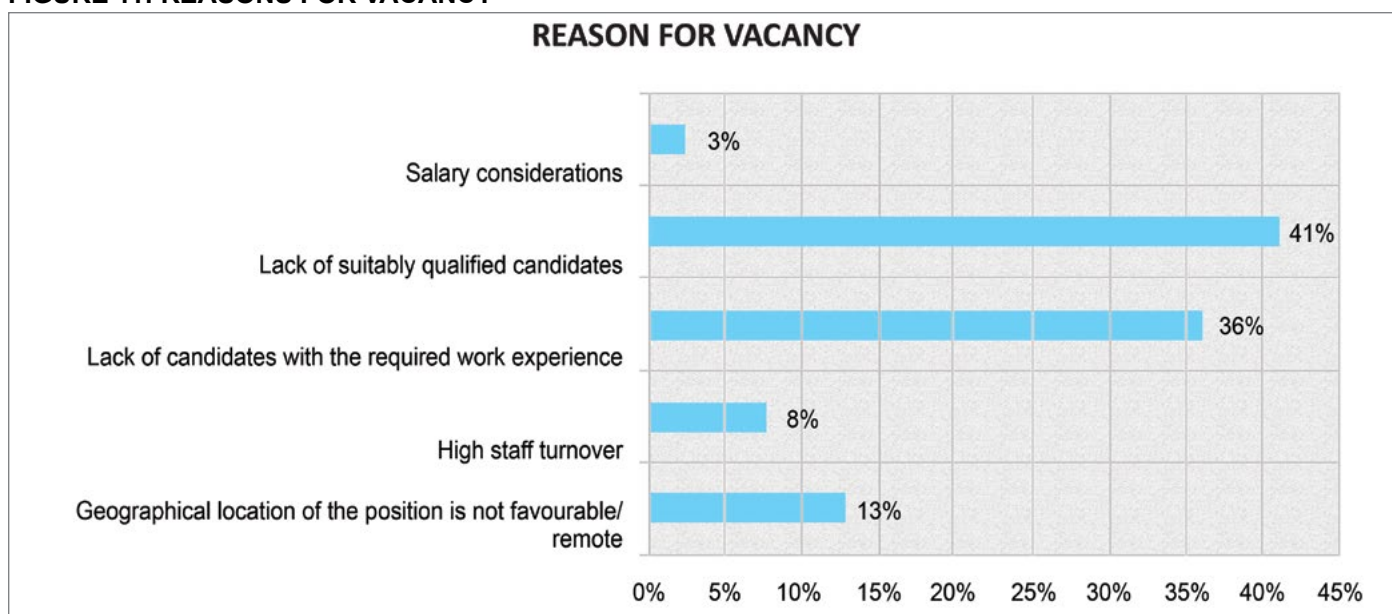
Arts, Culture and Heritage: Digital Artists have been identified as occupation with the highest demand in the sub-sector due to the lack of candidates with the required experience. **Sports, Recreation and Fitness:** Has a shortage of Fitness Instructor and Biokinetics. This is largely due to geographical location of the position is not favourable/remote and the lack of suitably qualified candidates. Fitness Centre Managers, Golf Course Manager were also identified as HTFVs due to lack of candidates with the required work experience.

Tourism and Travel: The sub-sector interestingly identified a shortage of Business Analysts and Data Scientists due to lack of candidates with work experience and lack of suitably qualified candidates. This could also be attributed to technological advancements and 4IR developments as highlighted under the change drivers.

3.2.2. Reasons for Hard-to-Fill-Vacancies

The previous section detailed reasons vacancies remain unfilled for lengthy periods per sub-sector. Figure 11 below, indicates the sector's overall reasons for hard-to-fill occupations.

FIGURE 11: REASONS FOR VACANCY



Source: CATHSSETA WSP data, 2021/22

41% of employers indicated that the main reason vacancies are difficult to fill is due to lack of candidates with the requisite qualifications. This is particularly the case in the Gaming and Lotteries, Hospitality, Sports, Recreation and Fitness, and the Tourism and Travel sub-sectors. This is followed by lack of candidates with the required work experience (36%), as the second reason vacancies are hard to fill. Thirdly, 13% of employers rated the geographical location of positions as not favourable to fill vacancies.

3.2.3. Skills Gaps at Major OFO Group Level

Skills gaps refer to specific key or generic and 'top-up' skills which an employee requires to carry out tasks competently. Key or generic skills include cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, ICT skills and skills that have to do with working in teams. Occupationally-speaking, specific 'top-up' skills are those required for performance within that occupation in order to fill a 'skills gap' that might have arisen as a result of a changing technology or the introduction of new forms of technology. The most common skills gaps are indicated for each OFO major Group Level in table 10.

TABLE 10: SKILLS GAPS PER MAJOR OFO GROUP LEVEL

Major Occupations	Top 3 Most Common Skills Gaps	Number of Skills Gaps
Managers	Adaptability	1247
	Advanced Computer IT and software	93
	Analytical skills	88
Professionals	Adaptability	901
	Advanced Computer IT and software	63
	Analytical skills	58
Technicians and Associate Professionals	Adaptability	966
	Advanced Computer IT and software	79
	Analytical skills	79
Clerical Support Workers	Adaptability	1127
	Advanced Computer IT and software	117
	Analytical skills	103
Service and Sales Workers	Adaptability	1121
	Advanced Computer IT and software	174
	Analytical skills	128
Skilled Agricultural, Forestry, Fishery, Craft and related	Adaptability	713
	Advanced Computer IT and software	57
	Analytical skills	50
Plant and Machine Operators and Assemblers	Adaptability	512
	Advanced Computer IT and software	40
	Analytical skills	37
Elementary Occupations	Adaptability	995
	Advanced Computer IT and software	130
	Analytical skills	104

Source: CATHSSETA WSP data, 2021/22

Based on the Mandatory Grant data, the most common skills gaps across all occupational groups is adaptability; advanced computer IT and software; and analytical skills. Consistent with the identified change drivers in chapter 2, this points to the transition towards a high-skilled labour market, and the ability to adapt to technological advancements and recovering from uncertain events such as COVID-19 which demand that both employers and employees keep abreast new development in the sector.

3.3. Extent and Nature of Supply

In order to determine skills supply within the sector, Higher Education Management Information System (HEMIS) data, publications from DHET, Mandatory Grant data submitted by employers, and the CATHSSETA Annual Report, have been analysed.

3.3.1. Extent of Occupational Skills Supply

The educational profile of employees in the sector is presented, per sub-sector, below.

TABLE 11: EDUCATION PROFILE OF EMPLOYEES PER SUB-SECTOR

Sub-sector	Educational level	Employees	Percentage
Arts, Culture and Heritage	AET	5	0%
	NQF 1	127	6%
	NQF 2, 3	36	2%
	NQF 4	1 126	54%
	NQF 5, 6	307	15%
	NQF 7, 8, 9, 10	468	23%
	Total	2 069	
Conservation	AET	156	1%
	NQF 1	1 693	10%
	NQF 2, 3	1 002	6%
	NQF 4	5 371	31%
	NQF 5, 6	6 481	37%
	NQF 7, 8, 9, 10	2 694	15%
	Total	17 397	

Sub-sector	Educational level	Employees	Percentage
Gaming and Lotteries Hospitality	AET	10	0%
	NQF 1	306	1%
	NQF 2, 3	1 110	5%
	NQF 4	14 812	63%
	NQF 5, 6	4 472	19%
	NQF 7, 8, 9, 10	1 404	6%
	Total	23 597	
	AET	584	1%
	NQF 1	5 475	5%
	NQF 2, 3	9 381	9%
	NQF 4	73 672	72%
	NQF 5, 6	10 799	11%
	NQF 7, 8, 9, 10	2 329	2%
	Total	102 240	
Sport, Recreation and Fitness	AET	82	1%
	NQF 1	572	4%
	NQF 2, 3	782	5%
	NQF 4	11 393	71%
	NQF 5, 6	2 624	16%
	NQF 7, 8, 9, 10	584	4%
	Total	16 037	
Tourism and Travel Services	AET	7	0%
	NQF 1	222	2%
	NQF 2, 3	538	6%
	NQF 4	3 526	38%
	NQF 5, 6	3 831	41%
	NQF 7, 8, 9, 10	1 161	12%
	Total	9 289	

Source: CATHSSETA WSP data, 2021/22

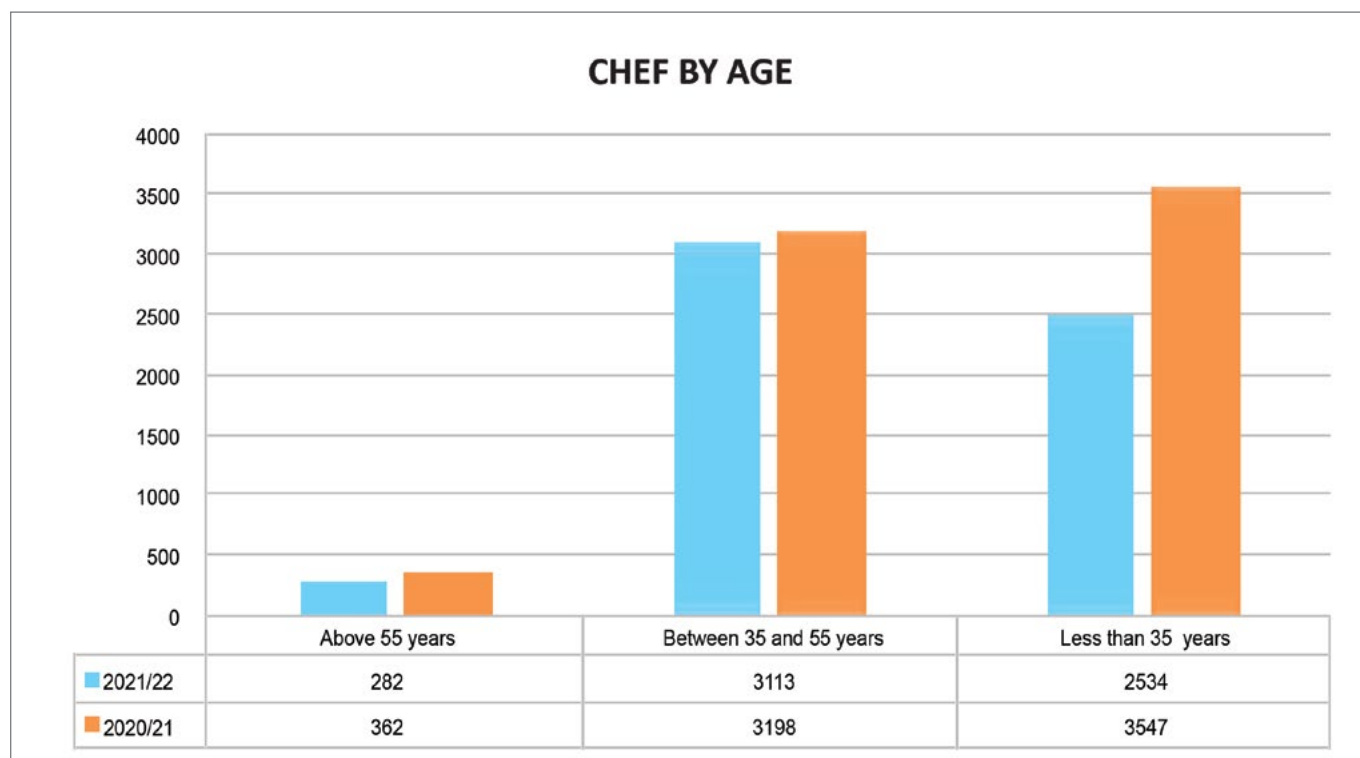
An analysis of the educational profile of the sector illustrates that the highest level of education for most employees in the sector (65%) is NQF level 4 – which is the equivalent of a National Certificate/Matric. This is followed by employees within the middle level skills band i.e., NQF level 5 and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

Out of the six CATHSSETA sub-sectors, Conservation is the only sub-sector wherein the highest proportion of employees (10%) possess an NQF level 1 qualification. This is consistent with the overall employment profile of the sub-sector, where most employees occupy elementary positions. While Conservation has the highest

proportion of employees falling into the lower skills levels, the sub-sector also has the highest number of employees with a post-graduate qualification. The Arts, Culture and Heritage, Gaming and Lotteries, Sports, Recreation and Fitness, and Hospitality sub-sectors have the highest percentage of employees in the middle skills category.

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

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



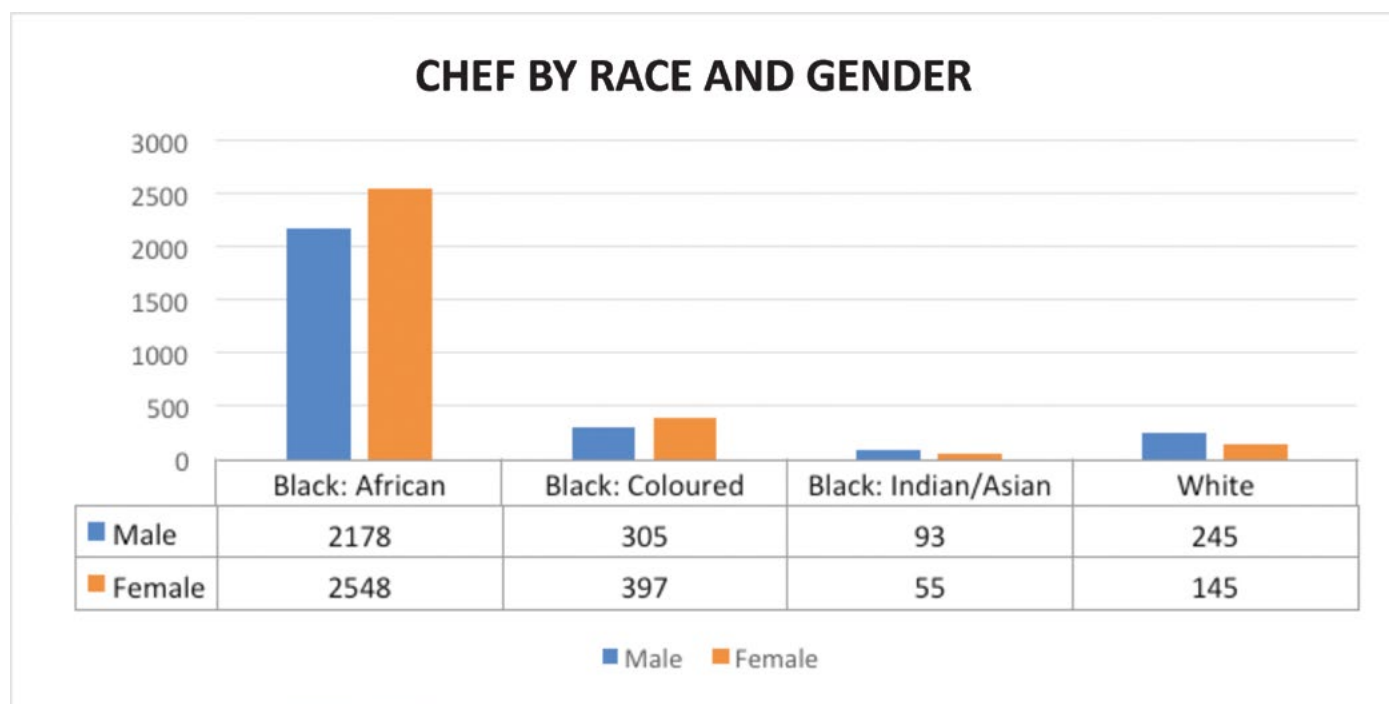
Source: CATHSSETA WSP data 2021/22

Based on Mandatory Grant data received from employers, the total number of Chefs employed in the sector has decreased from 7 107, in 2020/21, to 5 966, in 2021/22. In previous years, the number of Chefs in the sector was decreasing, largely attributed to an ageing workforce, where a high proportion of Chefs were above the age of 55 years, however in the current year, the decrease can also likely be attributed to employers being affected by the impact of COVID-19 in the Hospitality sub-sector.

In terms of race and gender, there is a slight decrease from the 2020/21 figures indicating 80% of Chefs in the sector as African. In the current year, 79% of Chefs in the sector are African, followed by 12% Coloured, 7% White, and 2% Indian/Asian.

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FIGURE 13: DEMOGRAPHIC ANALYSIS OF THE CHEF TRADE BY RACE AND GENDER



Source: CATHSSETA WSP data 2021/22

3.3.2. State of Education and Training Provision

Analysis has been conducted on skills supply from the Technical Vocational Education and Training (TVET) sector and University sector. Great focus was paid on trends in enrolment and completion rates for each of the educational levels. Higher Education Institution (HEI) data, sourced from DHET, was analysed for the 2018 and 2019 period. The figures are based on the headcount of unduplicated student enrolments and graduations according to the second order Classification of Educational Subject Matter (CESM) category of major(s)/area of specialisation and qualification type. More generic qualifications, such as Business Administration Management and Operations have the highest proportion of enrolments and graduates, whilst Sport, Recreation and Movement, and Mind-Body Therapy account for the lowest number of enrolments and recorded graduates. Reasons could be increased tuition fees, the missing middle, alternative provisions, or steep entry requirements. The table below presents the total number of enrolments and graduates in 2018 and 2019. Overall, data shows that there was over a 60% increase in the number of enrolments in 2019.

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

Sub-sector	Qualifications*	NQF Levels	2018		2019	
			Total Enrolment	Total Graduates	Total Enrolment	Total Graduates
Arts, Culture and Heritage	Dance	5-10	828	92	297	73
	Design and Applied Arts	5-10	5 455	828	3 485	908
	Drama/Theatre Arts	5-10	3 338	545	2 882	606
	Film/Video and Photographic Arts	5-10	844	333	1 254	335
	Fine and Studio Art	5-10	7 101	844	3 895	710
	Music	5-10	200	710	3 156	584
	Visual and Performing Arts, Other	5-10	57	20	32	15
Conservation	Botany/Plant Biology	5-10	997	432	2 230	481
	Zoology/Animal Biology	5-10	768	351	2 224	490
	Ecology, Evolution, Systematics and Population Biology	h5-10	1 625	411	1 746	549
Hospitality	Food Science and Technology	5-10	2 106	554	2 210	534
	Hospitality Administration/ Management	5-10	729	1656	8 645	1456
	Foods, Nutrition and Related Services	5-10	411	322	1 488	303
Sport, Recreation and Fitness	Parks, Recreation and Leisure Facilities Management	5-10	440	729	3 409	761
	Movement and Mind-Body Therapies and Education	5-10	329	166	46	6
Tourism and Travel	Business Administration, Management and Operations	5-10	18 813	16 681	87 379	18 266
	Entrepreneurial and Small Operations	5-10	1 565	592	3 392	577
			45 606	25 266	127 770	26 654

Source: DHET HEMIS data, 2019

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

Unlike HEIs, TVET Colleges have different enrolment cycles which affects how students are counted and reported. For each academic year, there are six enrolment intakes/cycles i.e., annual, trimester and semester. The TVET colleges enrolment figures reported in this section reflect a cycle count of student records where a student record is counted only once in an enrolment period/ cycle and counted at the highest level of the programme they are enrolled into. Table 13 below provides the 2019 enrolment data reported and submitted on the Technical and Vocational Education and Training Management Information System (TVETMIS). Overall a total of 59697 were enrolled in TVET programmes relevant to CATHSSETA sub-sector. There was a higher proportion of female enrolments (78%) relative to males (22%). Females also accounted for a large number of enrolments across all programmes. The majority of enrolments for NC(V) programmes were in Office Administration (49% or 29 438), followed by Hospitality (15% or 9163) and Tourism (15% or 8674).

Table 13: Enrolment cycle count of students in TVET colleges by NC(V) programmes and gender, 2019

Programme	NC(V) Level 2		NC(V) Level 3		NC(V) Level 4		NC(V) Total		
	Female	Male	Female	Male	Female	Male	Female	Male	Total
Hospitality	3436	1027	1992	482	1838	388	7266	1897	9163
Management	2181	927	1432	515	1213	344	4826	1786	6612
Marketing	1705	959	984	460	1221	481	3910	1900	5810
Office Administration	10257	2494	7159	1435	6903	1190	24319	5119	29438
Tourism	2917	1414	1669	691	1456	527	6042	2632	8674
Total	20496	6821	13236	3583	12631	2930	46363	13334	59697

Source: DHET TVET MIS data 2019.

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

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



TVET colleges are regarded as important in their ability to create the skills required by the economy and industry. If the education provided by TVET matches the needs of the labour market, it increases not only the student's employability but also contributes to political and social participation as well. Due to the pivotal contribution that TVET colleges make to the PSET, there is therefore a need for the development of lecturers in these institutions to optimise their contribution to skills development.

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

Training capacity in the Sports, Recreation and Fitness sub-sector is mainly provided by universities and universities of technology HEIs. While HEIs offer a variety of degrees and diplomas relevant to the SRF sub-sector, it must be noted, there are no accredited programmes in TVET Colleges relevant to this sub-sector. Besides formal education institutions, accredited by the Council on Higher Education (CHE) and Umalusi, CATHSSETA has accredited private providers to offer SRF learning programmes. However, the need to increase the number of these providers remains, as there are very few accredited training providers, or none, in certain provinces. To counter this deficit, the capacity of the Public TVET system will have to be developed to offer a full spectrum of CATHSSETA sub-sector qualifications.

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

A Graduate Tracer Study (2016) on the other hand found that, although there is a mismatch between industry needs and academic qualifications, most of the graduates interviewed had were employed. Of the graduates sampled in the Arts, Culture and Heritage sub-sector, 85% were employed, of which, 82% were employed in the relevant industry. However, employment tended to be on a freelance basis due to the part-time nature of the jobs in this sub-sector. The only full-time employment opportunities were for Arts Administrators. The same

was observed in the Gaming and Lotteries sub-sector, with over 60% of graduates securing employment, and 82% working in the gaming sector.

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

3.3.3. Supply Problems Experienced by Firms

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

Employers have an important leadership role to play in providing viable pathways into the workforce, particularly amid uncertainty about exactly what the future of work will look like. This leadership can take many different forms, from partnering with local high schools, to creating internal skills development programs, to identifying skills needs and communicating these skills to local education and skills development entities. Employers and educators have different strengths with respect to preparing individuals for the workforce. By working together, they can help create viable pathways that benefit employees, employers, and the wider community (Brookings 2019). CATHSSETA can assist the sector by facilitating consultative engagements between industry and sector skills suppliers to bridge the gap between skills supply and industry expectations.

3.4. Sectoral Priority Occupations and Interventions (PIVOTAL)

CATHSSETA utilises a combination of data and labour market signals to monitor and determine occupations that are hard to fill. These inform the priority skills, the occupations of which are listed in the Sectoral Priority Occupations, formerly known as Professional, Vocational, Training and Academic Learning (PIVOTAL) list in table 14 below, as approved by the CATHSSETA's AA. Some of the data and signals used and observed were:

- All enterprises submitting Mandatory Grant applications (comprising planned training Interventions; and reported training) completed a section on HTFVs in their sub-sectors;
- The number of vacancies and degree of scarcity of HTFVs; and
- The pool of unemployed skilled people.



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

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

All data and input are captured using the six-digit OFO codes. Occupational shortages are identified as a function of two variables: the total number of vacancies identified, and the degree of scarcity. Occupations were identified across all six sub-sectors within the CATHSSETA scope. Occupations that were deemed to support the Green economy and the 4IR were included in the list. The quantity of Sectoral Priority Occupations was determined by tracking and listing occupations identified in the 2018 and 2019 SSP, which were added to the occupations identified in the WSP, including HTFVs. The actual quantity per occupation of Sectoral Priority Occupations, was arrived at by deducting the total number of trained learners (as per the CATHSSETA's Consolidated Scarce Skills Analysis Report 2019), from the 2019/20 SSP and WSP numbers. The AA has approved the sectoral priority occupations. Occupations that reflected over-supply, and which had been on the list for the past 10 years, were removed. Occupations were further ranked according to demand per sub-sector, in order to determine the top 10 Sectoral Priority Occupations.

TABLE 14: TOP 10 OCCUPATIONS ON THE SECTORAL PRIORITY OCCUPATIONS LIST

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA *
Arts and Culture	Professionals	2019-264201	Copywriter	Publicity Writer, Copy Editor, Advertising Writer	NQF Level 5 in Digital Content and Copywriting NQF Level 5 in Digital Copywriting and online marketing Advanced Diploma in Copywriting Degree/Diploma in Media Studies	5 - 7	17
	Professionals	2019-251301	Multimedia Specialist	Multimedia Programmer, Animation Programmer, Computer Games Programmer, Graphical Programmer, Digital Media Specialist, Multimedia Developer	Bursary: National Diploma - Sound Technology and Production National Certificate: 3D Animation and Visual Effects NQF Level 5 National Certificate: Film and Television Production NQF Level 5 FET Certificate: Photography NQF Level 4 National Certificate Design Techniques NQF Level 5 – Communication Design Advanced Diploma in Computer Applications Technology (CAT) Education Advanced Certificate: 3D Animation and Visual Effects Advanced Diploma in Multimedia Computing National Certificate Design Techniques NQF Level 5 – User-Interface Design Higher Certificate in Game Graphics and Multimedia Entertainment Higher Certificate in Game Design and Production National Certificate: 3D Animation and Visual Effects Advanced Diploma in Information and Communication Technology in Multimedia Application	5 - 7	14

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
Conservation	Professionals	2019-213307	Park Ranger	Game/Park Warden, Beach and Estuary Warden, Fish Warden, Wildlife Officer/Warden, Wildlife Conservationist	Learnerships: National Certificate - Nature Resource Guardianships Terrestrial Further Education and Training Certificate: Nature Conservation: Natural Resource Guardianship National diploma in game ranch management Higher Certificate in Ecotourism Management Advanced Diploma in Ecotourism National Diploma: Nature Conservation Further Education and Training Certificate: Professional Hunting Endangered and Priority Species Conservation and Habitat Management Course Eco Training Field Guide, Nature Site Guide NQF2 Bachelor of Science: Zoology	2 - 7	320
	Managers	2019-134901	Environmental Manager	Land Care Manager, Wildlife Management Services Manager, Pollution and Waste Manager, Agriculture and Forestry Coordinator, Water Resource Manager, Environmental Health Manager, Contaminated Sites Manager, Centralised Permits and Cites Manager, Land and Water Manager, Species Protection Manager, Conservation Science Manager, Sanitation Programme Manager, Environmental Education Manager, Wildlife Protection Services Manager, Conservation Agriculture System Manager, Water Quality Manager	Bachelor of Applied Science in Nature Conservation Advanced Certificate in Nature Conservation in Trans-Frontier Conservation Management B.Sc. In Wildlife Management B.Sc. In Environmental and Water Science B.Sc. In Ecology and Conservation Bachelor Nature Conservation Advanced Diploma in Wildlife Management	6 - 7	123

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA *
Gaming and Lotteries	Clerical Support Workers	2019-421202	Gaming Worker	Casino Gaming Inspector, Casino/Gaming Dealer, Gaming Pit Boss, Gaming Inspector, Casino Surveillance Operator, Gaming Operator, Croupier, Gaming Table Operator	Learnership: National Certificate Gaming Operations National Certificate: Dealing	5	252
	Managers	2019-143101	Betting Agency Manager	Racing Betting Branch Manager, Tab Manager	Learnership: Generic Management Diploma in Casino Resort Management Advanced Certificate in Operations Management Further Education and Training Certificate: Gaming Supervision	5 - 6	28
Hospitality	Managers	2019-141201	Café (Licensed) or Restaurant Manager	Bistro Manager, Internet Cafe Manager, Cafeteria Manager, Catering Manager, Food Services Manager, Caterer, Restaurateur, Mess Manager, Canteen Manager, Food and Beverage Manager	Bursary and Learnership: Food and Beverage Studies/Services Advanced Certificate: Education: Hotel Keeping and Catering Advanced Certificate in Hospitality Management Diploma in Hospitality Management Advanced Diploma in Hospitality and Food and Beverage Management National Diploma: Professional Cookery Advanced Diploma in Hospitality and Professional Cookery Bachelor of Business Administration in Hospitality Operations Management	6	1311
	Technicians and Associate Professionals	2019-343401	Chef	Chef de Partie, Commis Chef, Head Chef, Pastry Chef, Demi Chef, Sous Chef, Saucier, Executive Chef, Second Chef	Apprenticeship/Learnership: National Certificate - Professional Cookery Certificate: Food Preparation and Cooking Certificate: Culinary Arts Advanced Diploma in Hospitality and Professional Cookery	5	1281

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
Sport, Recreation and Fitness	Technicians and Associate Professionals	2019-342301	Fitness Instructor	Physical Training Instructor, Aerobics Instructor, Physical Fitness Trainer, Health and Fitness Instructor, Aquarobics Instructor, Gym Instructor/Trainer, Gymnasium Attendant, Physical Education Officer, Physical Activity Coordinator, Fitness Centre Worker, Fitness Consultant/Trainer/Instructor, Personal Trainer	Skills Programme: Fitness Instructor Advanced Certificate in Exercise Science Advanced Certificate in Fitness in Sport Conditioning Diploma in Sport Management Advanced Diploma in Kinesiology and Coaching Science Bachelor of Arts in Sport Science Advanced Diploma in Sport, Exercise and Recreational Therapy Advanced Certificate in Fitness Conditioning Coach	5 - 7	692
Tourism and Travel Services	Clerical Support Workers	2019-422102	Travel Consultant	Inbound Tour Manager, Travel Agent Representative, Travel Consolidator, Booking Travel Clerk, Travel Reservation Clerk, Travel Officer, Travel Arrangements Manager, Travel Agent, Travel Clerk, International Travel Consultant, Domestic Travel Consultant, Travel Wholesaler	Advanced Diploma in Tourism Management Leamership: National Certificate - General Travel Bachelor of Commerce: Travel and Tourism Further Education and Training Certificate: Travel and Tourism Bachelor of Tourism Development and Management	5 - 7	717

*Subject for review once SLA targets have been approved

Source: CATHSSETA WSP data, 2020/21

3.5. Conclusion

This chapter focused on understanding occupation-specific skills-mismatches identified by employers in the sector. In general, most employment falls within the low to middle level range of skills, which is typical of the services industry. The supply of skills, however, necessarily takes place at all three (3) levels: low, middle and high. The skills mismatch occurs due to the disjuncture between supply and demand. The issue of skills gaps in the sector has been presented for each of the major occupational groups, the findings of which are corroborated by the training needs assessment. A Sectoral Priority Occupations list, identifying the top occupations that will be addressed, was presented.

4.1. Introduction

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

- Public TVET Colleges and CETs
- HEIs, Universities of Technology (UoTs) and other PSET institutions
- Labour Unions
- SMMEs, Co-operatives, Non-Profit Organisations (NPOs), NGOs and Community-based Organisations (CBOs)
- Large employers and industry bodies within the sector

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

4.2. Analysis of existing seta partnerships

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

4.2.1. State of Existing Partnerships

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

TVET and CET Partnerships: The NSDP envisages that the growth of TVET Colleges will expand the provision of mid-level technical and occupational qualifications and translate to work opportunities for the growing number of young people leaving the schooling system. There are 43 TVET Colleges, across 55 campuses, offering the National Certificate Vocational (NCV) in Hospitality and Tourism at NQF levels 2, 3 and 4. Some of the TVET Colleges have also obtained programme approval from CATHSSETA so as to offer CATHSSETA's accredited NQF aligned qualifications. During the 2020/21 financial year, CATHSSETA supported the placement of 150 TVET learners through work integrated learning opportunities to enable learners to complete their Diplomas and increase their chances of employability or self-employment. The NSDP further acknowledges the role played by CETs in expanding skills development in the country. CETs cater for the knowledge and skills needs of the large numbers of adults and youth requiring education and training opportunities, unemployed people, and those employed but in low or semi-skilled occupations.

The quality of training provided by the public providers is generally of a high standard. However, some public providers face facility challenges, especially those of the TVET Colleges and CETs, which are not given a sufficient budget with which to upgrade their training facilities. CATHSSETA funded TVET Colleges and CETs to upgrade the infrastructure used by students studying qualifications in the CATHSSETA sub-sectors. The infrastructure projects funded included the following: upgrade of the hospitality facility, renovation of the kitchen infrastructure for hospitality students and baking equipment (oven, bench, cake mixer, bread pan, scale, dough mixer and king mixer). Details of existing TVET College and CET partnerships are outlined in the table below.

TABLE 15: EXISTING TVET AND CET PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
College of Cape Town DG2020/0073	Discretionary Grant funding support	WIL programme: Placement of learners registered with TVET Colleges who require internships to complete their training with employers.	01-Dec-20	01-Jun-23	Link learners to the workplace to assist with completing qualifications to address occupational shortages in the sector.
Ekurhuleni West TVET College DG2020/0772					
Majuba TVET College DG2020/1249					
Thekwini TVET College DG2020/0838					
West Coast TVET College DG2020/0001					
Northlink College DG2020/0884					
Ikhala TVET College DG2020/0751			31-Jan-21	31-Jul-23	
Waterberg TVET College DG2020/0371			05-Mar-21	05-Sep-23	
Tshwane North TVET college DG2020/1270			20-Feb-21	20-Aug-23	
Maluti TVET College DG2020/0974			15-Feb-21	15-Aug-23	
Ikhala TVET College DG2020/0751			25-Mar-21	25-Sep-23	
South West Gauteng TVET College	Infrastructure Development Project	Upgrade of the hospitality facility, renovation of the kitchen infrastructure for hospitality students and baking Equipment	31-Mar-21	31-Mar-23	To provide support to public providers with facility challenges used by students studying towards qualifications in the sector.
North West CET College					
Gauteng CET College					
Kwa Zulu Natal CET College					
Ekurhuleni TVET College					
Boland TVET College					
Limpopo CET College					

HEIs and UoT Partnerships: To address occupations in high demand and priority occupations, CATHSSETA acknowledges the need to support and offer bursaries to prospective learners studying towards qualifications relevant to the needs of the sector. In the 2020/21 financial year, CATHSSETA continued to nurture its partnership with various HEIs and UoTs through the provision of bursary funding to 116 studying towards qualifications in the sector.

In addition, CATHSSETA provided support for workplace-based learning in the form of internships for university graduates and those university learners requiring work experience to complete their qualifications. During this period CATHSSETA partnered with 6 HEIs and UoTs for the placement of 116 learners within CATHSSETA industries for internship purposes. CATHSSETA also partnered with the with an HEI to conduct a sector analysis in the Gaming and Lotteries sub-sector through a research partnership.

TABLE 16: EXISTING HEI AND UoT PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships			
University of Venda DG2020/0082	Discretionary Grant funding support	Bursary: To address skills requirements, as well as promote research in the sector	1-Dec-20	1-Dec-22	To increase the throughput of students registered in high-demand occupations to provide a supply pipeline for the economy and labour market in response to the occupations in high demand list.			
Walter Sisulu university DG2020/0098								
Sol Plaatje University DG2020/1147								
Tshwane University Of technology DG2020/0302								
Rhodes University DG2020/0553								
Central University of Technology DG2020/1243								
Cape Peninsula university of Technology DG2020/0581								
Nelson Mandela University DG2020/1124								
University of Witwatersrand DG2020/1341								
Mangosuthu University of Technology DG2019/0169						1-Feb-21	1-Feb-23	
Cape Peninsula University of Technology DG2020/0581			15-Mar-21	15-Mar-23				
Nelson Mandela University DG2020/1124			22-Mar-21	22-Mar-23				
Central University of Technology DG2020/1242		WIL and Internship: To increase the pool of work-ready graduates in occupations in high demand and priority occupations as outlined in the CATHSSETA SSP	1-Dec-20	1-Jun-22				
Central University Technology DG2020/1241								
Durban University of Technology DG2020/0466								
Vaal University of Technology DG2020/0203								
Cape Peninsula University of Technology DG2020/0582								
Durban University of Technology DG2020/0465								
Vaal University of Technology DG2020/0204								
Sol Plaatje University DG2020/1148						1-Mar-21	15-Dec-22	
University of Venda DG2020/0085						15-Feb-21	31-Jul-23	
Durban University of Technology DG2020/0466						15-Mar-21	31-Jul-23	
Durban University of Technology DG2020/0465			25-Mar-21	25-Sep-22				

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
Wits Commercial Enterprise Pty Ltd (“Wits Enterprise”)	Research partnership with University of Witwatersrand	Conduct a sector analysis study in line with the CATHSSETA research agenda and DHET updated SSP Framework and Guidelines (2019).	17-Jan-20	31-May-22	The sector analysis provides the SETA with credible sector intelligence to establish the skills needs of the sub-sector.

Labour Unions: The NSDP encourages the support of worker-initiated training in the skilling of workers in broader sectoral policy and capacity to effectively engage in the workplace and broader economy.

In 2020/21, CATHSSETA partnered with five (5) labour unions operating within its sub-sectors by providing them with bursary and skills programme funding for 68 workers in the areas of Counselling, Emotional Intelligence, Labour Relations, Occupational Health and Safety in the workplace, as well as 4IR approaches to labour workforce leadership.

TABLE 17: EXISTING LABOUR UNION PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
National Union of Mine Workers of South Africa SP - WKP2020/01	Discretionary Grant funding support	Workshop: Skilling of workers in broader sectoral policy and capacity to effectively engage in the workplace and the broader economy	17-Jul-20	31-Mar-21	Supports worker-initiated training as per NSDP outcome.
The National Union of Metalworkers South Africa (NUMSA) DG2020/1323		Bursary: To address skills requirements, as well as promote research in the sector	15-Mar-21	15-Mar-23	To increase the throughput of students registered in high-demand occupations to provide a supply pipeline for the economy and labour market in response to the occupations in high demand list.
Entertainment Catering Commercial and Allied Workers Union of South Africa N000410990		Skills Programme: Support to address skills gaps in line with the CATHSSETA SSP	31-Mar-21	31-Mar-22	Promotes accredited training and encourages assistance in the acquisition of critical skills for the employed.
Food and Allied Workers Union (FAWU) SP/02		Bursary: To address skills requirements, as well as promote research in the sector			To increase the throughput of students registered in high-demand occupations to provide a supply pipeline for the economy and labour market in response to the occupations in high demand list.
Hotel Liquor Commercial Catering & Allied Workers Union (HOTELICCA) SP/04					
Trade Union for Musicians of South Africa (TUMSA)					

SMMEs, Co-operatives, NPOs, NGOs and CBOs: 43 SMMEs were directly supported through bursary and skills programme funding for their workers, whilst others were provided with opportunities to host learners for work integrated learning. CATHSSETA also appointed two (2) accredited training providers to upskill about 50 SMMEs based in 2 of the country's rural provinces. These SMMEs will be upskilled in the areas of new venture creation and computer literacy with the objective of using the skills acquired to grow and expand their business thereby creating employment opportunities within their communities. CATHSSETA also planned to support about 4 co-operatives operating within its sub-sectors with funding for skills development initiatives, however co-operatives were not responsive during the Discretionary Grant funding windows. CATHSSETA changed the strategy and instead supported the identified co-operatives with capacity building initiatives on the CATHSSETA funding and application processes.

TABLE 18: EXISTING SMME, CO-OPERATIVE, NPOs, NGO AND CBO PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
Imbizo Training & Development Consultants N000101368	Discretionary Grant funding support	New Venture creation and Computer Literacy programmes to use the skills acquired through this training intervention to empower small businesses in the sector.	31-Mar- 21	31-Mar- 22	Equipping beneficiaries with the relevant skills to grow and expand their business thereby creating employment opportunities within their communities.
Phalaphala Management Consulting N000410963			31-Mar- 21	31-Mar- 22	
Amasiko Trading Enterprise cc N000411024			29-Mar- 21	29-Mar- 22	
Bambisandla Sam Non-Profit Company DG2020/1120		Bursary: To address skills requirements, as well as promote research in the sector	1-Dec-20	1-Dec-22	To increase the throughput of students registered in high-demand occupations to provide a supply pipeline for the economy and labour market in response to the occupations in high demand list.
Manne Skills Consulting DG2020/0976			1-Dec-20	1-Dec-22	
Border Cricket NPC DG2020/1126			15-Feb- 21	15-Feb- 23	
ENDUROCAD-SA Endurance Academy DG2020/1412		WIL and Internship: To increase the pool of work-ready graduates in occupations in high demand and priority occupations as outlined in the CATHSSETA SSP	1-Dec-20	1-Dec-22	
Sport Science Institute of South Africa DG2020/0833			1-Dec-20	1-Dec-22	
Border Cricket NPC DG2020/1127			1-Dec-20	1-Dec-22	
Babsy Mlangeni Foundation NPC DG2020/1458			1-Mar-21	1-Sep-23	
Sport Science Institute of South Africa DG2020/0833			25-Mar- 21	31-Jul-23	
Bambisandla Sam- Non-Profit Company DG2020/1120		Support skills development needs of entrepreneurs and cooperatives within its sub-sectors, with particular focus on the unemployed, youth, women, and people with disabilities.	1-Dec-20	30-Jul-22	Contributes to economic empowerment as a value proposition and not compliance matter in support of vulnerable groups and organisations.
Mphatlalatsane United Football Club DG2020/1381 & 1382			15-Feb- 21	30-Jun-22	
Bambisandla Sami DG2020/1119			15-Mar- 21	31-Jul-23	

Partnerships with large employers in the sector including public entities: Employers in the sector play a significant role in not only providing CATHSSETA with data for skills planning purposes through the submission of Mandatory Grant applications, but also through opening their workplaces as training spaces for learners to gain workplace experience through learnerships, apprenticeship programmes, skills programmes, internships and work integrated learning. CATHSSETA signed Discretionary Grant funding agreements with a multiplicity of partners including government departments and institutions in the various sub-sectors as reflected in the table below.

TABLE 19: PARTNERSHIPS WITH LARGE EMPLOYERS IN THE SECTOR INCLUDING PUBLIC ENTITIES

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
City Lodge Hotel Group	Discretionary Grant funding support	Employers opening their workplaces as training spaces for learners to gain workplace experience through learnerships, apprenticeship programmes, skills programmes, internships and work integrated learning	11-Jan-21	30-Jul-22	Increase exposure to the workplace for labour market entrants and equip beneficiaries with both soft and technical skills that would not necessarily be developed without working in a professional setting.
Servest Catering & Camp management			1-Dec-20	30-Jun-22	
Durban Marine Theme Park			1-Dec-20	30-Jun-22	
Summer Season trading 120 PTY LTD t/a East London International Convention Centre			1-Dec-20	30-Jul-22	
Plattner Golf/ Fancourt			1-Dec-20	30-Jun-22	
Empact Group			1-Dec-20	30-Jun-22	
The South African Lion Park PTY LTD DG2020/0938			1-Dec-20	30-Jun-22	
Marshall World of Sports DG2020/1254			1-Dec-20	30-Jun-22	
Adinvale PTY t/a Sondela nature Reserve			1-Dec-20	30-Jun-22	
Peermont Global		Bursary: To address skills requirements, as well as promote research in the sector	1-Dec-20	1-Dec-22	Integrate learning through a combination of academic and work-related activities.
Burger King South Africa PTY LTD			1-Dec-20	1-Dec-22	
Grand Palace Trading (Pty) Ltd t/a Ghost Mountain Inn			1-Feb-21	1-Feb-23	
Tourvest Restaurant and Taverns			1-Dec-20	1-Dec-22	
Century City Centre and Hotel			1-Dec-20	1-Dec-22	
Emerald Safari Resort		WIL and Internship: To increase the pool of work ready graduates in occupations in high demand and priority occupations as outlined in the CATHSSETA SSP	1-Dec-20	1-Dec-23	To enhance the soft skills of labour market entrants and advance their theoretical knowledge with exposure in the workplace.
South African heritage Resources Agency			1-Dec-20	1-Dec-22	
Western Province professional Rugby (Pty)			15-Feb-21	15-Aug-23	
Sierra Park Burgers Hotel			15-Feb-21	15-Aug-22	
Kwa Zulu Natal Museum			1-Dec-20	01-Jun-22	
Department of Higher Education and Training	Career guidance support	To expose learners to career opportunities with the Arts, Culture, and Heritage sub-sector	31-Mar-21	31 Mar-22	Expose the unemployed to education or training opportunities offered in the sector to promote skills development and labour market access.

4.2.2. Successful Partnerships

Partnership with the National Student Financial Aid Scheme (NSFAS): Despite the challenges posed by the COVID-19 Pandemic during the 2020/21 financial year, the SETA had significant success in implementing partnership projects in the sector. Over and above the partnerships outlined above, CATHSSETA continues to partner with the NSFAS to increase the funds available for student loans and bursaries through the Scheme. In line with the White Paper on Post School Education objective of expanding access and increasing diversity in the PSET sector, CATHSSETA entered into a R10 million contract to fund 80 TVET College students and 60 HEI learners studying towards qualifications in line with the occupations in high demand identified in the CATHSSETA SSP.

TVET College Partnerships International Footprint – The Chinese Culture and International Education Exchange Centre: The NSDP notes that countries with strong TVET Colleges have good relationships between industry and the TVET Colleges. In such systems, TVET Colleges play a particularly important role in directly linking intermediate technical education and the labour market. In the 2019/20 financial year, CATHSSETA entered into a partnership agreement with the Chinese Culture and International Education Exchange Centre (Chinese Culture Centre) to co-sponsor 40 Arts and Design TVET College students with an opportunity to gain invaluable international industry experience in China through a WIL Programme. The WIL programme commenced in October 2019 and was completed in October 2020 with students equipped with internationally competitive skills that will contribute towards the sustainable economic growth of CATHSSETA's diverse sector.

4.2.3. Problems Experienced with Partnerships

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

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

Public entities: Partnerships with public entities are unique. Certain public entities are often reluctant to fund projects, expecting the SETA to fund the project in its entirety. The roll-out of projects is monitored only by the SETA and the appointed training provider, and further involvement from the public entity's side, in terms of exercising oversight, is limited and relies heavily on the training provider. This is indicative of problems due to lack of role clarification and communication.

TVET Colleges: The challenge the SETA faces with TVET Colleges is lack of infrastructure geared towards responding to SETA requirements, for example, lack of capacity-enabling preparation of relevant documents



for programme approval. Another challenge encountered during the implementation of the programme is delays in the recruitment of learners.

Co-operatives: As mentioned above, the SETA also experienced challenges with entering into formal partnerships with co-operatives. Co-operatives are instrumental to the economic growth of rural and township economies. The SETA, through continued capacity building support, plans to prioritise support for these institutions in the new financial year.

To strengthen partnerships, it is imperative that the SETA maintains current partnerships through focused engagements, and a clear definition of roles and responsibilities. To address the challenge of the lack of participation by industry in the development and review of qualifications, CATHSSETA plans to increase stakeholder engagement and participation, in order to solicit buy-in, by building strong relationships with key stakeholders in the sector.

During the 2016/17 period, additional offices were established at TVET Colleges, in five (5) provinces, to foster easy accessibility, and thus enable close communication. However, due to operation requirements fuelled by financial constraints, the SETA has had to reduce the number of offices operating from TVET colleges from the five established in the 2016/17 financial year to 2 in the 2020/21 financial year. The SETA will continue to strengthen its relations with the remaining Colleges through Discretionary Grant funding opportunities.

4.3. Planned partnerships

The SETA will continue to partner with institutions in the Post School Education and Training sector (PSET), sector employers, NGOs/NPOs, co-operatives, labour unions and private education and training providers for the achievement of the NSDP outcomes. New partnerships will include extending existing partnerships with institutions involved in sector research, WIL programmes, strengthening skills development initiatives, youth and women empowerment, and career guidance support.

TABLE 20: PLANNED PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
TVET /CET Colleges	Infrastructure Development Projects	To fund the equipment required to enhance learning (practical component) for hospitality and arts & Culture students.	1-Apr-2021	31-Mar-23	Assisting the industry in being more competitive in terms of its facilitating infrastructure base, as well as boosting business related to infrastructure development, to diversify the economy.
	ETD Practitioner Training for CET	To support the CETs to embark on a journey to have these institutions accredited on CATHSSETA skills programmes.			
	Adult Education Work Placements (Internships & WIL) Bursary funding	To increase the number of youths engaging in AET programmes through funding			
Organised Labour	Training Interventions through Bursary and Skills Programme funding	To identify training needs, provide training and RPL	1-Apr-2021	31-Mar-23	To improve the ability to integrate learning by combining academic and work-related activities.
National Student Financial Aid Scheme (NSFAS)	Bursary Funding	To provide funding particularly to students in the missing middle group. (i.e., those students whose parents' income is too high for normal NSFAS funding but too low for parents to qualify for loans)	1-Apr-2021	31-Mar-23	To improve the ability to integrate academic learning and develop specific competencies and transferable skills.
SMMES, NGO/NPOs, Cooperatives	Training Interventions through workshops, Bursary and Skills Programme funding	To provide economic benefit through collaboration and economies of scale thereby reducing input, operational and distribution costs.	1-Apr-2021	31-Mar-23	To increase the build content and skills and increasing the economic growth.
Sector employers, government departments and entities	Bursary funding	To open their workplaces as training spaces for school leavers and graduates to gain workplace experience through learnerships, apprenticeship programmes, skills programmes, internships and work integrated learning Employers also provide opportunities for their workers to participate in learnerships, skills programmes and bursary programmes.	1-Apr-2021	31-Mar-23	Improve academic learning integration and create specialized talents and transferable skills.
Universities and Universities of Technology	Research Output	To conduct labour market research and SSP development	1-Apr-2021	31-Mar-23	For the stakeholders (CATHSSETA and Universities) to gain a better understanding of basic job skills as well as a variety of soft and technical skills instilled within the beneficiaries.
	Bursary funding	To improve the relationship between the education and training and workplace by creating a skills pipeline where work ready graduates from HEIs are channelled to workplaces			
	Internship funding				
Department of Tourism	Career guidance support	To expose learners to career opportunities within the Tourism and Travel, and Hospitality sub-sectors	1-Apr-2021	31-Mar-23	To support the unemployed to access education or training opportunities, and employment thereof that will provide access to a source of income, social contact, and purposeful activity.

4.4. Successful Partnership Approach/Model

CATHSSETA partnerships are guided by the strategic priorities of the SETA outlined in the 2020/21 – 2024/25 SSP. CATHSSETA's approach to partnerships and partnership models are outlined in the Discretionary Grant and Strategic Projects policies. Partnerships are formed with entities that express interest during the Discretionary Grant funding window, both for PIVOTAL and non-PIVOTAL programmes. For rural communities or remote or previously disadvantaged regions with limited resources required to access the opportunities presented by the SETA (for instance data and ICT equipment), a developmental approach and additional support is given in the form of capacity building initiatives.

4.5. Conclusion

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

CHAPTER 5: SETA MONITORING AND EVALUATION

5.1. Introduction

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

5.2. Sector Skills Planning Reflections

5.2.1. CATHSSETA Approach to Monitoring and Evaluation

CATHSSETA has a Unit responsible for monitoring and evaluation (M&E), within the Research, Monitoring and Evaluation Department. The Unit co-ordinates all M&E processes within CATHSSETA, from planning to reporting, covering mainly Quality Assurance, Learning programmes and Special Projects. Currently, the Unit supports the SETA with evaluation reports on various skills development interventions; monitoring of performance against organisational targets; as well as consolidated M&E reports such as the Annual Report. Outputs from the M&E unit are also used by the Research, Planning and Performance unit to inform skills planning.

In line with the NSDP 2030 outcomes, M&E helps to provide an evidence base for CATHSSETA resource allocation decisions, and further assists in identifying how challenges ought to be addressed and successes replicated. CATHSSETA Quarterly Monitoring Reports and Annual Reports are collated and analysed to assess the:

- Achievement of planned annual targets;
- Alignment of implemented skills development interventions against the PIVOTAL list from the previous SSP;
- The extent to which CATHSSETA learning programmes have addressed identified skills development priorities;
- The progress in the establishment of concrete partnerships;
- The improvement on the performance of training providers;
- Outcomes of collaborations with employer organisations; and
- Attainment of strategic outcomes.

Research reports and tracer studies, conducted on behalf of, in partnership with, or sponsored by CATHSSETA, as per the Research Agenda, are used in the planning process. They are captured in the SSP annual updates and further cascaded into the Strategic Plan, wherever applicable. Figure 14 below illustrates the CATHSSETA Planning Process that informs the M&E process. The SETA's M&E framework and plan describe the approach that the institution is to follow, to create and operate an M&E system that produces credible, accurate information, on an ongoing basis, that will be used to improve service delivery and governance. CATHSSETA M&E systems will be integrated with existing management and decision-making systems. M&E strategies will outline how M&E findings will inform strategic and operational planning, budget formulation and execution, as well as in-year and annual reporting.

FIGURE 14: PLANNING PROCESS



5.3. Scope of Monitoring and Evaluation

The M&E functions are as follows:

5.3.1.1. Monitoring

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

5.3.1.2. Evaluation

- i. The evaluation process supports learning, within the scope of CATHSSETA, of the ways in which projects could be designed and refined to better meet these outcomes and support the intended impact, as outlined and identified in the SSP

- ii. The evaluation process also allows the CATHSSETA to consider which other projects need to be prioritised, if it is to meet its overarching strategic skills development goals for the sector, as identified in the SSP and the Strategic Plan
- iii. Assess the challenges identified during the implementation process, as well as the SETA achieved its set objectives.

5.4. Previous SSP Strategic Priorities

The CATHSSETA SSP 2020/21 identified the following key development priorities and actions for the sector (table 21).

TABLE 21: PREVIOUS SSP STRATEGIC SKILLS PRIORITIES

No.*	Strategic Skills Priority (SSP)	Outcomes in the SP	Number of KPIs in the APP	KPIs Achieved
1	Fourth Industrial Revolution	Identified and increased production of occupations in demand	3	67%
2	Analysis of skills needs			
3	Training provision	Improved levels of skills in the South African workforce	3	67%
4	Increased partnerships to include worker-initiated interventions			
5	Sector Transformation	Improved career development services; and Entrepreneurship and cooperative development supported through skills development	7	88%
6	SE Interventions and Green Economy			
7	Monitoring and Evaluation	An effective administration maintained	3	100%
8	Addressing Occupational Shortages and Skills gaps	Access to occupationally directed programmes improved	2	100%

*Note: Numbering is not in order of priority

Source: Draft Annual Report, 2020/21

5.5. Strategic Priorities not Achieved

The following strategic skills priorities were not achieved in 2020/21 and the reasons for that are stated in the last column of table 22.

TABLE 22: STRATEGIC PRIORITIES NOT ACHIEVED

No.	Strategic Skills Priority (SSP)	Outcomes in the SP	Reasons for deviation
2	Analysis of Skills Needs	Identified and increased production of occupations in demand	Due to the COVID-19 pandemic, the Minister through directives extended the Mandatory Grant (MG) application submission date which, as a consequence negatively impacted the MG administration timelines.
3	Training Provision	Improved levels of skills in the South African workforce	Due to the COVID 19 effects, most of the learning programmes were suspended from April 2020. CATHSSETA subsectors being most affected by the lockdown, the completion dates for these programmes had to be extended to the next financial year.
6	SE Interventions and Green Economy		

Planned mechanisms to address Skills Priorities not achieved in the previous year are covered in detail in Table 23 below.

TABLE 23: PLANNED MECHANISMS FOR STRATEGIC PRIORITIES NOT ACHIEVED

No.	Strategic Skills Priority (SSP)	Planned Mechanisms to Address the Skills Priorities Not achieved in the Previous Year
2	Analysis of Skills Needs	CATHSSETA has put measures in place to manage any potential extensions afforded to stakeholders as a result of the pandemic through an online MG management and payment portal to manage the risk of non-achievement of targets. This is further supported by planned capacity building workshops and strengthened internal administration processes.
3	Training Provision	COVID-19 (particularly the hard lockdown) negatively impacted on the achievement of the following outcomes: • Education linked to the workplace, particularly the number of unemployed learners entering skills programmes and number of unemployed learners completing learning programmes. • Entrepreneurship and cooperative development supported through skills development, particularly the number of small enterprises supported through training interventions. CATHSSETA has put plans in place to open the discretionary grant window earlier than usual and support stakeholders through capacity building workshops to apply for funding and swiftly conclude the administration processes preceding reporting to enable the achievement of targets. The entire process of managing Discretionary grant applications and reporting learners has been digitised to reduce the impact of any potential lockdown in the achievement of the set outputs. Capacity building of the stakeholders on the online digital system will be intensified.
6	SE Interventions and Green Economy	

5.6. Plan of Action

5.6.1. NSDP 2030 Linked to SSP Priorities

The strategic skills priorities for 2021/22 have been identified, mapped and linked to the NSDP 2030 outcomes, (table 24).

TABLE 24: NSDP 2030 LINKED SSP PRIORITIES

NSDP Outcomes	CATHSSETA-Linked Priorities
Outcome 1: Identify and increase production of occupations in high demand	• Fourth Industrial Revolution • Analysis of skills needs • Technological advancement to combat the impact of the COVID - 19 Pandemic
Outcome 2: Linking education and the workplace	• Sector transformation • Addressing occupational shortages and skills gaps
Outcome 3: Improving the level of skills of the South African workforce	• Training provision • Increased partnerships to include worker-initiated interventions
Outcome 4: Support the increase in access to occupationally directed programmes	• Addressing occupational shortages and skills gaps
Outcome 5: Support the growth of the public College system	• Training provision • Sector transformation

NSDP Outcomes	CATHSSETA-Linked Priorities
Outcome 6: Skills development support for entrepreneurship and cooperative development	Small, Micro and Medium Enterprises (SMME) intervention and the green economy
Outcome 7: Encourage and support worker-initiated training	Increased partnerships to include worker-initiated interventions
Outcome 8: Support career development services	Analysis of skills needs

5.7. Measures to ensure that currently set priorities are met

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

TABLE 25: ACTION PLAN

Skills Priority	Programme/Project	Achieved/In Progress	Planned Measures	Link to NSDP Outcome
Fourth Industrial Revolution	Scoping Exercise: Implications for CATHSSETA and COVID-19 Implications for E-Learning	Commissioned research service provider to carry out 4IR study	Develop a strategy to address the identified skills implications of the 4IR on the sector	UPDATED
Training Provision	Assessment QCTO (JIP)	New	Engagement with QCTO, Joint Implementation Plan	UPDATED
Analysis of skills needs	Research Projects and Qualifications Review	Research Progress Report in the Research Agenda	Update Research Agenda for evidence-based decision making and identification of skills needs	UPDATED
Increased Partnerships to include Worker-initiated Interventions	TBC	TVET Colleges Employers Universities	MoU to support worker-initiated training	UPDATED
Transformation	Mentoring and coaching/TVET & CET capacity-building	Work Readiness Programme Workplace-Based Learning & experiential learning	New teaching and learning methods/workplaces	UPDATED
SMME Interventions and Green Economy (Resource Efficiency)	TBC	SMMEs training projects	Develop skills development strategy for SMME, entrepreneurship, new enterprises, and informal traders	UPDATED
Monitoring and Evaluation	TBC	New	Review and elevate Monitoring and Evaluation	UPDATED
Addressing Occupational Shortages and Skills Gaps through E-Learning	Learning Programmes	Learning programmes delivered in line with the e-learning policy and standards.	Provide Apprenticeship Learnerships WIL and Internships Bursaries Skills programmes opportunities	UPDATED



Skills Priority	Programme/ Project	Achieved/In Progress	Planned Measures	Link to NSDP Outcome
Technological advancement to combat the impact of the COVID - 19 Pandemic	TBC	New	The SETA aims to continuously engage with stakeholders, as part of the Research efforts the SETA undertakes to update the Sector information, on the following initiatives: Recognition Technology Virtual Reality E-Learning	UPDATED

Based on the above, CATHSSETA must embark on several research projects as part of the research agenda to enhance the quality of its training provision in the sector. This will enable the SETA to have a better understanding of the skills needs of the various sub-sectors and their nuances to inform skills planning through, among other things, the implementation of the 4IR forecasting research and the Gaming and Lotteries sub-sector analysis studies. Both these studies are currently underway and once completed, they will contribute towards the future sector skills planning process.

The SETA is also implementing the Tracking and Tracing study of CATHSSETA beneficiaries of learning programmes from 2015/16 to 2018/19. This is a crucial study that supports the M&E plan for the 2021/22. This study is critical in helping us understand the impact of the SETA's learning interventions and offer an opportunity to improve on the quality and appropriateness of the chosen learning interventions for our sectors.

The impact of the COVID-19 on all the six sub-sectors of CATHSSETA has been difficult to ignore as our sub-sectors are negatively impacted and will take even more time to recover economically. This has also had an adverse effect on the sector and the SETA in its ability to roll-out its training plans for 2020/21 to 2021/22. This is partly due to the inadequate preparedness of the SETA and the sector on remote learning capabilities such as e-learning. Currently, the SETA does not have an e-learning policy and this is an urgent area of priority so that the SETA can lead the sector so that learning can continue to take place regardless of the restrictions in place as a result of social distancing and limited contact periods of learning.

5.8. Conclusion

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

CHAPTER 6: STRATEGIC SKILLS PRIORITY ACTIONS

6.1. Introduction

This chapter consolidates and presents the findings from previous chapters and reflects on priority actions for the CATHSSETA sector. Information and analyses from previous chapters have been reviewed and culminate in recommended actions that are realistic, consistent, and achievable. This chapter provides a set of priority actions, but it is not a detailed strategic or operational plan. Consideration of national strategies and plans has also been considered to ensure alignment with government priorities.

6.2. Key Skills Findings from Previous Chapters

The Key Findings from previous chapters have been summarised in table 26.

TABLE 26: KEY FINDINGS

CHAPTER	KEY FINDINGS
Chapter 1	• The vast majority of entities in the sector (96%) are small entities. • Overall, the country's GDP declined in 2020 due to the economic impact of COVID-19 and skills levies were reduced due to the payment holiday. All six CATHSSETA sub-sectors are negatively affected. • The health of the economy has been reported to have slumped by 7% GDP in the financial year of 2020/21 • The economic contribution declined across all economic sectors due to the effects of the COVID-19 Pandemic. All six CATHSSETA sub-sectors are negatively affected. • The Hospitality sub-sector employs the highest number of people in the sector, followed by Gaming and Lotteries. Arts and Culture has the least employees in all the sub-sectors. • The distribution of employees and employers is highest in Gauteng, Western Cape and KwaZulu-Natal provinces, with the Northern Cape having the least. • Most employees in the sector are African (76%), followed by Coloured employees (11%), White (9%) and Indian/Asian (4%). • Females make up 57% of employees in the sector, 46% of whom are African females. • The majority of employees are employed in Service and Sales occupations (35%), followed by Elementary Workers (20%) and Clerical Support Workers (15%). • The age demographics illustrated show that most employees in the sector (51%) are classified as youth (less than 35 years) with over 50% of them employed at lower occupational levels. • A total of 205 317 employees are reported to be employed in the sector, reflecting an 8.36% decline from the 2018/19 number of 224 039.

CHAPTER	KEY FINDINGS
Chapter 2	- The COVID-19 Pandemic has emerged as a key skill change driver in 2020. World economies have almost collapsed due to this pandemic. This has resulted in job losses, retrenchments, and company closures. - There have been increased technological advancements across the six sub-sectors e.g., Online betting; the use of the internet for purchases; social media; mobile apps; and wearable technology in sports. The implication is that functional and technical skills will have to be accompanied by technological skills. - Technological developments that have emerged in the past decade have resulted in the growth of the gig economy and workforce that enable transactions directly between providers and consumers. 4IR brings in new technologies and occupations, which will translate into new occupations, reshaping future Skills needs and education and training requirements. - As a result of changes in the sector, the demand for higher quality products and services is on the rise. This requires an enhanced skills base to meet the changing demand. - Employers need a more flexible skills base, which can adapt to competing environments. - The sector needs to invest in training Interventions and Learning programmes favourable to the emerging Green Economy. The sector needs to find innovative and strategic ways of planning and mitigation of the effects of climate change through research and development, and investment in green qualifications. - The key skills actions emanating from the above, translate into keeping the qualifications and skills set of learners and educators relevant to rapid technological advancements in the sector.
Chapter 3	Occupational Shortages and Skills Gaps 48% of employers indicated that the main reason vacancies are difficult to fill is due to a lack of suitably qualified candidates, followed by lack of candidates with the required work experience, as the second reason vacancies are hard to fill. - The most common skills gaps across the majority of occupational groups are: knowledge of new work process, new job tasks, and technological changes in the workplace. Skills Supply 80% of employees are in the middle level skills band, between NQF levels 3-6. - The sector reports 5 062 Chefs employed in 2019/20, to 6 938 in the current year. This figure has declined from 7 634 in 2017/18 and 12 232 in 2016/17. The decline in numbers can be attributed to several factors, including higher demand of Chefs by other sectors, globalisation, economic decline or technological innovation. Further research needs to be conducted to establish the real causes. Supply and Demand - Graduates in the sector are generally viewed as not meeting employer expectations in terms of Skills Requirements. - The sector perceives there to be a skills-mismatch between graduates and job requirements. - To bridge the skills-mismatch between graduates and job requirements, the SETA needs to form strategic partnerships with industry to ensure that industry requirements are aligned with qualifications and that providers are kept informed of these requirements.
Chapter 4	CATHSSETA recognises the need to form Partnerships with: - Public TVET Colleges and CETs - HEIs, (UoTs and other PSET institutions - Labour Unions - SMMEs, Co-operatives, NPOs, NGOs and CBOs - Large employers and industry bodies within the sector - Successful partnership models, which may be replicated, include qualifications review, research partnerships and career guidance events that can inform existing and potential entrants to the sector of the career opportunities and paths available. - Further collaborative measures are required in order for qualification development, implementation of inter-seta qualifications, implementation of learning programmes, placement of learners in internships and capacitating the TVET sector.

CHAPTER	KEY FINDINGS
Chapter 5	- Strategic skills priorities for the previous year were assessed, and those that were not achieved were indicated and action plans provided. - Current priorities were included, together with proposed action plans. - The SETA needs to strengthen the coordination and implementation of the M&E framework, including the training of staff on Implementation Tools.

6.3. Recommended Priority Actions

Key findings from the previous chapters, and common feedback from stakeholder engagements have culminated in the key planned strategic priority actions as outlined below. In the sub-sections below, we therefore provide a comprehensive description of the key strategic actions planned in response to the SETA's current external operating environment.

6.3.1. South African Economic Reconstruction and Recovery Plan

In support of the ERRP, the ERSS identifies the skills implications of the ERRP and explicitly outlines the ways in which the PSET system will respond to this demand in a manner that ensures that the skills that are required to implement this plan are available. The table below outlines the interventions CATHSSETA intends to address in support of the Plan and Strategy.

TABLE 27: CATHSSETA SUPPORT FOR THE ERRP

ERRP PRIORITY INTERVENTION	ERSS INTERVENTIONS	PRIORITY INTERVENTION PLANNED BY THE SETA
Priority intervention 3.4: Gender equality and economic inclusion of women and youth	Intervention Three: Increased access to programmes resulting in qualifications in priority sectors	CATHSSETA, through the implementation of its transformation targets as part of the Discretionary Grant funding criteria, allocates 60% to the youth, 1% to persons living with disabilities, and 65% to female beneficiaries.
Priority intervention 3.5: Support for the recovery and growth of the tourism, cultural and creative industries	Intervention Seven: Retraining/up-skilling of employees to preserve jobs	CATHSSETA plans to conduct a study on the impact of COVID-19 which will assist in determining the skills are required for the recovery and re-orientation of identified sectors.
Priority intervention 3.6 Green Economy interventions	Intervention Three: Increased access to programmes resulting in qualifications in priority sectors	Support identified occupations in shortage and possible interventions: - Environmental Scientist - Energy Engineer - Energy Engineering Technologist - Wind Turbine Power Plant Process Controller - Water Plant Operator
N/A	Intervention One: Embedding skills planning into sectoral processes	CATHSSETA to actively participate in committees established to support planning and recovery in the sector.
	Intervention Three: Increased access to programmes resulting in qualifications in priority sectors	Amending accreditation and qualification requirements for funding for programmes identified as immediate priorities. Prioritise partnerships with HEIs and TVET Colleges to increase enrolments in immediate priority areas.
	Intervention Ten: Strengthening the post-school education and training system	As part of the research agenda in the next financial year, CATHSSETA plans to carry out a feasibility study for the implementation of e-learning in the sector.

6.3.2. Fourth Industrial Revolution

Technological advancement and the 4IR have been identified as key change drivers influencing occupational patterns and training delivery in the sector. The technological advancement trend is critical for both skills supply and demand, and for CATHSSETA to identify skills requirements, more precisely, for purposes of qualification review and priority skills identification across the sub-sectors. To realise this, the SETA is currently conducting a scoping exercise through the CATHSSETA Research Agenda to assess the impact of the 4IR on the sector, and how best CATHSSETA can intervene and support the sector in addressing identified skills. This scoping exercise will further assist the SETA in identifying opportunities presented by the 4IR, and how best to make use of resources to support the sector in meeting the demands of the 4IR in the context of skills development.

6.3.3. SMME Interventions and Green Economy (Resource Efficiency)

SMMEs have been identified as a key component to advancing growth and development in South Africa. Based on the sector profile, the majority of entities in the sector are SMMEs, making up 96% of the CATHSSETA sector. In the context of a high unemployment rate in the country, coupled with poverty and inequality, it becomes pertinent for the SETA to facilitate empowerment of SMMEs through skills development programmes. The SETA needs to develop and implement a skills strategy for SMME development, entrepreneurship, new enterprises, cooperatives, and information traders. Through this strategy, the SETA should identify ways to expand its reach for small entities to secure funding for skills development initiatives in a way that is accessible and considers the challenge associated with owning a small business in the country.

6.3.4. Technological Advancement to Combat the Impact of the COVID-19 Pandemic

COVID-19 has been identified as another key change driver in the sector. Since the global outbreak of the Pandemic and enforcement of national lockdown regulations, there has been a growing dependence on technology to ensure business continuity and social integration. Despite the poor economic performance of the sector, for some businesses, social networking, e-commerce, and digital marketing, amongst other things, have been essential in minimising the impact of COVID-19. With that said, there has been considerable coverage of the devastating effects of the Pandemic on CATHSSETA's sub-sectors, however, a more detailed and scientific analysis of those effects from a skills development perspective is not readily available. As a result, the SETA is embarking on a research study to assess the overall impact of COVID-19 on the sector, and its implications for skills development. The study will assist in examining factors such as, the adaptive requirements needed by the sector to recover from COVID-19; the extent to which COVID-19 has influenced the demand and supply of skills; and how the SMMEs operating in the sector have been affected as well as mechanisms for recovery.

6.3.5. Sector Transformation

Based on the findings above, the sector is falling short of meeting the national disability equity target in terms of the number of employees in the sector. People with disabilities tend to be disproportionately affected by the lack of an enabling environment when trying to perform practical day to day tasks. Due to a lack of awareness, the perceived burden of providing an inclusive environment can be a deterrent to some employers and training providers in the sector. This phenomenon extends to the ability of people with disabilities to access skills development opportunities. In addition, there are sectors that still have the majority of black people and in particular females, at the bottom of the ladder in terms of occupational levels. The SETA plans to

establish partnerships with NGOs and CBOs that work with people with disabilities to increase support to this marginalised group by (a) identifying other such barriers to skills development opportunities for people with disabilities, (b) putting measures in place to mitigate these challenges, and (c) identify measures to increase access to skills development opportunities to improve employability. The SETA will also partner with employers to train those employees that are semi-skilled and unskilled.

In addition to the key emerging strategic priorities, the SETA also recognises the importance of having operational strategic priority actions in line with its service offering, which include:

- Training Provision;
- Analysis of Skills Needs;
- Increased Partnerships to include Worker-initiated Interventions;
- Addressing Occupational Shortages and Skills Gaps; and
- Sector Advancement.

The overall planned actions for current SETA Strategic Skills Priorities are summarised in table 28.

TABLE 28: SETA STRATEGIC SKILLS PRIORITY ACTIONS

SETA STRATEGIC SKILLS PRIORITY ACTIONS		
Skills Priority	Program/Project	Planned Actions
1. Fourth Industrial Revolution	Scoping exercise: Implications for CATHSSETA	Skills identification through the Research Agenda
2. Training Provision	Assessment QCTO (JIP)	Engagement with QCTO, Joint Implementation Plan
3. Analysis of Skills Needs	Research Projects and Qualification Review; ERSS Intervention Three: Increased access to programmes resulting in qualifications in priority sectors	Research projects articulated in the Research Agenda
4. Increased Partnerships to include Worker-initiated Interventions	Organised labour engagement	Initiate partnerships with organised labour to leverage established networks with members
5. Sector Advancement	Mentoring and coaching/TVET & CET capacity-building; Intervention Ten: Strengthening the post-school education and training system	New teaching and learning methods/ workplaces, WRP
6. SMME interventions and Green Economy (Resource efficiency)	Develop Skills Development Strategy for SMMEs, entrepreneurship, new enterprises and informal traders; ERRP Priority intervention 3.6 Green Economy interventions	Implement Skills Development Strategy for SMMEs, entrepreneurship, new enterprises and informal traders
7. Monitoring and Evaluation	Review M&E Framework and Plan	Elevate Monitoring and Evaluation
8. Addressing Occupational Shortages and Skills Gaps	Learning Programmes	Support Apprenticeship Learnerships WIL and Internships Bursaries Skills programmes

SETA STRATEGIC SKILLS PRIORITY ACTIONS		
Skills Priority	Program/Project	Planned Actions
9. Technological advancement to combat the impact of the COVID-19 Pandemic	Research Agenda: Impact of COVID-19 on CATHSSETA-sub-sectors; ERRP Priority intervention 3.5: Support for the recovery and growth of the tourism, cultural and creative industries	Examine the overall impact of COVID-19 on CATHSSETA sub-sectors and its implications for skills development.
10. Sector Transformation	ERRP Priority intervention 3.4: Gender equality and economic inclusion of women and youth; Partnership projects for transformation imperatives	Initiate partnerships with NGOs and CBOs to increase support for people with disabilities Upskilling of people in lower occupational categories

6.4. Measures to support National Strategies and Plans

The impetus to support national strategies and plans is embedded in the CATHSSETA strategy and the six sub-sector strategies. These are implemented in and through partnerships with national departments responsible for the economic sectors. The ERRP and the ERSS require CATHSSETA to review its partnership arrangement to respond to national skills priorities.

The National Department of Sport, Arts and Culture (DSAC), Department of Tourism, Department of Forestry, Fisheries and the Environment (DFFE), and the Department of Trade, Industry and Competition (DTIC), are custodians of the following sector strategies related to CATHSSETA:

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

6.5. Conclusion

The CATHSSETA has been deemed a crucial driver of skills development within our diverse sub-sectors. As such, investment in human capital development, knowledge, and skills, has great economic value. The impact of education and training on company performance and the economic sector is an important issue because of the large amounts invested. One single, stand-out achievement has been getting employers in the sector involved in accredited training, other than in-house, non-accredited training. A large number of sector employers are beginning to realise that the effects of education and skills on productivity and innovation are generally positive and significant.

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ANNEXURE 1

OCCUPATIONS IN HIGH DEMAND



ANNEXURE 1: OCCUPATIONS IN HIGH DEMAND

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2020*
Arts and Culture	2019-264201	Copywriter	Publicity Writer, Copy Editor, Advertising Writer	Bursary and Internship	7	16	17
	2019-251301	Multimedia Specialist	Multimedia Programmer, Animation Programmer, Computer Games Programmer, Graphical Programmer, Digital Media Specialist, Multimedia Developer	Bursary: National Diploma - Sound Technology and Production Learnership	6	13	14
	2019-352103	Sound Technician	Video and Sound Recorder, Sound Effects Person, Re-recording Mixer, Dubbing Projectionist (Sound Mixing), Dubbing Machine Operator, Sound Editor/Mixer/Recordist/Operator/Specialist, Audio Technician, Audio Operator		4	8	8
	2019-343203	Visual Merchandiser	Display Decorator, Window Dresser	Bursary and Internship	7	8	8
	2019-263206	Heritage Consultant	n/a	Learnerships: National Certificate: Heritage Resource Management Learnership	7	8	8
	2019-343902	Light Technician	Lighting Electrician, Lighting Operator, Lighting Technician, Lighting Assistant, Lighting Director		4	4	4
	2019-216603	Multimedia Designer	Multimedia Artist, Instructional Designer, Digital Media Designer, Interactive Media Designer	Bursary and Internship	5	2	2
	2019-216601	Digital Artist	Calligrapher, Lithographic Artist, Display Artist, Advertising Artist/Designer, Lettering Designer, Art Director, Exhibition/Display Designer, Film and Video Graphics Designer, Commercial Artist, Graphic Artist, Publication Designer	Bursary and Internship	6	2	2
	2019-333903	Sales Representative (Business Services)	Sales Representative (Printing), Sales Representative (Publishing), Advertising Sales Consultant, Print Cost Estimator, Business Services Officer, Sales Representative (Advertising)	Learnership	4	2	2

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2020*
Arts and Culture	2019-121905	Programme or Project Manager	Project Director	Learnership	4	2	2
	2019-132401	Supply and Distribution Manager	Supply Chain Manager, Supply Chain Executive, Storage and Distribution Manager, Procurement Manager, Freight Forwarding Customs Clearing Manager, Acquisitions Manager, Depot Manager	Bursary	7	2	2
	2019-511301	Gallery or Museum Guide	Supply Lead Manager, Parts Manager, Purchase Manager, Freight Manager, Goods Clearance Manager	Bursary and Internship	5	2	2
	2019-652302	Fitter and Turner	Museum or Gallery Attendant, Museum Host and Tour Coordinator, Gallery Assistant	Bursary/Internships and Workplace Experience	4	12	12
	2019-213307	Park Ranger	Printers Mechanic, Industrial Mechanician	Learnerships: National Certificate - Nature Resource Guardianships Terrestrial	5	305	320
Conservation	2019-134901	Environmental Manager	Game/Park Warden, Beach and Estuary Warden, Fish Warden, Wildlife Officer/Warden, Wildlife Conservationist	Bursary/Internships and Workplace Experience	6	117	123
	2019-211402	Hydrologist	Care Manager, Wild Life Management Services Manager, Pollution and Waste Manager, Agriculture and Forestry Coordinator, Water Resource Manager, Environmental Health Manager, Contaminated Sites Manager, Centralised Permits and Cites Manager, Land and Water Manager, Species Protection Manager, Conservation Science Manager, Sanitation Programme Manager, Environmental Education Manager, Wild Life Protection Services Manager, Conservation Agriculture System Manager, Water Quality Manager	Bursary: Bachelor of Science Hydrology	7	10	11
	2019-335906	Environmental Practices Inspector	n/a	Learnership: National Certificate Environmental Practices	7	4	4

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2020*
Conservation	2019-314102	Environmental Science Technician	Water Pollution Control Officer, Parks and Reserves Technical Officer, Naturalist, Ecological Technical Officer, Conservation Scientific Officer, Environmental Technical Officer	Bursary and Internship: National Diploma in Environmental Science	7	1	1
	2019-421202	Gaming Worker	Casino Gaming Inspector, Casino/Gaming Dealer, Gaming Pit Boss, Gaming Inspector, Casino Surveillance Operator, Gaming Operator, Croupier, Gaming Table Operator	Learnership: National Certificate Gaming Operations	5	240	252
	2019-342302	Outdoor Adventure Guide	Shark Swimming Guide, Snorkelling Guide, River Kayaking Guide, Diving Operator, Dolphin Swimming Guide, White-water Rafting Guide, Outdoor Adventure Leader, Hunting Guide, Kayaking Guide, Cycle Touring Guides, Team Building Operator, River Rafting Guide, Horse Riding Instructor, Mountain Guide, Adventure Tourism Operator, Hiking Guide, Adventure Safari Guide, Fishing Guide, Horse Trekking Guides, Bungee Jump Master, Sea Kayaking Guide, Outdoor Adventure Instructor, Outdoor Recreation Guide, Trekking Guide	Learnership	4	2	2
	2019-211205	Climate Change Scientist	N/A	Bursary and Internship	7	2	2
	2019-242210	Business Administrator	N/A	Learnership	4	11	11
	2017-143101	Betting Agency Manager	Racing Betting Branch Manager, Tab Manager	Learnership: Generic Management	5	27	28
	2019-251201	Software Developer	Software Designer, ICT Risk Specialist, Software Architect, Information Architect Software, Software Engineer	Bursary and Internship	6	27	28
	2019-351301	Network Technician	Network Support Technician	Bursary and Internship	6	17	18
	2019-541402	Alarm, Security or Surveillance Monitor	Answering Service Operator, Security Monitor	Bursary/Internships and Workplace Experience	4	34	34
Gaming and Lotteries							

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2020*
Gaming and Lotteries	2019-143102	Gaming Manager	Slots Technical Manager, Slots Manager, Gaming Promotions Manager, Gaming Administration Manager, Tables Manager, Cashier Manager Gaming Race Track Operations Manager, Gaming Project Manager	Bursary and Internship	4	12	12
	2019-242211	Internal Auditor	Information Systems Auditor, ICT Internal Auditor, Audit Consultant, Internal Auditor	Bursary and Internship	7	13	13
	2019-541902	Emergency Service and Rescue Official	Emergency Response Officer, Mine Rescue Service Worker, Rope Rescue Technician, Industrial Paramedic	Bursary and Internship	5	5	5
	2019-343401	Chef	Chef De Partie, Commis Chef, Head Chef, Pastry Chef, Demi Chef, Sous Chef, Saucier, Executive Chef, Second Chef	Apprenticeship/ Learnership: National Certificate - Professional Cookery	5	1220	1281
Hospitality	2019-515101	Hotel Service Manager	Bar Manager, Hotel Chief Steward, Commissionaire Porter, Accommodation Manager, Head Housekeeper, Head / Front Office Porter (Hotel), Hotel Concierge, Front Office Manager (Hotel), Hotel Office Manager	Skills Programme	5	1152	1210
	2019-141102	Guest House Manager	Bed and Breakfast Operator	Bursary: Management Development Programme	6	501	526
	2019-141101	Hotel or Motel Manager	Lodge Manager, Boarding House Manager, Duty Manager (Hotel), Innkeeper, Hotelier, Resort Manager, Backpackers Manager, Hostel Manager	Bursary: Management Development programme	7	401	421
	2019-512101	Cook	n/a	Skills Programme: Cook Convenience/ Assistant Chef	2	140	147
	2019-513101	Waiter	Drinks Waiter, Night Club Hostess, Wine Attendant, Restaurant Hostess, Food and Beverage Attendant, Silver Service Waiter, Dining Room Attendant, Maitre D, Formal Service Waiter, Lounge Assistant, Sommelier, Wine Steward	Skills Programme	5	107	112
	2019-841201	Kitchenhand	Pantry Attendant, Sandwich/Salad Preparer, Kitchen Steward, Kitchen Assistant (Non-domestic), Dishwasher	Skills Programme	2	102	107
	2019-513202	Barista	Coffee Maker	Skills Programme	5	89	93

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2020*
Hospitality	2019-311903	Food and Beverage Technician	Beverage Laboratory Technician, Distillery Technician, Brewery Technician, Gas Chromatographic, Food Laboratory Technician, Fermentation Technician, Dairy Laboratory Technician, Sugar Laboratory Technician, Food Science Technician, Brewmaster/Master Brewer, Milling Laboratory Technician	Bursary and Internship	6	32	34
	2019-422401	Hotel Receptionist	n/a	Skills Programme and Learnership: Hospitality Reception; WIL: Hospitality studies	5	20	21
	2019-121206	Health and Safety Manager	Safety, Health and Environmental (SHE) Manager	Bursary and Internship	5	14	15
	2019-811201	Commercial Cleaner	School Cleaner, Workshop Cleaner, Factory Cleaner/Sweeper, Waterblaster, High Pressure Water Jetting Operators, Office Cleaner, Hotel/Motel Cleaner, Building Exterior/Interior Cleaner, Cleaner (Non-domestic)	Skills Programme	1	98	98
	2019-422206	Call or Contact Centre Agent	N/A	Learnership	3	6	6
	2019-252301	Computer Network and Systems Engineer	Network Programmer/Analyst, Network Engineer Computer Systems/Service Engineer, Communications Analyst (Computers), Systems Engineer, Computer Network Engineer, Systems Integrator, Network Support Engineer, Computer Systems Integrator, ICT Customer Support Officer	Bursary and Internship	7	6	6
	2019-243204	Event Producer	Concert Promoter/Organiser, Meeting Planner Event Coordinator, Government, Protocol or Civic, Event Organiser, Event Director, Event Manager Specialist, Festival Coordinator, Conference and Event Organiser/Coordinator, Social/Life Cycle Organiser, Wedding Coordinator, Professional Conference Organiser, Sports Event Organiser	Learnership	4	20	20
	2019-732101	Delivery Driver	Light Utility Vehicle (LUV) Driver, Van Driver, Grocery Deliverer, Fast Food Delivery Driver, Driver-messenger, Taxi Truck Driver, Meals On Wheels Driver, Armoured Car Driver	Learnership	3	50	50

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2020*
Hospitality	2019-132102	Manufacturing Operations Manager	Industrial Production Manager, Plant Superintendent, Processing Manager, Planning Manager (Manufacturing), Operations Manager (Production), Works/Workshop Manager (Manufacturing), Processing Unit Manager, Distillery Manager, Plant Manager (Manufacturing)	Bursary and Internship	5	7	7
	2019-141201	Restaurant Manager	Bistro Manager, Internet Cafe Manager, Cafeteria Manager, Catering Manager, Food Services Manager, Caterer, Restaurateur, Mess Manager, Canteen Manager, Food and Beverage Manager	Bursary and Learnership: Food and Beverage Studies/ Services	6	1249	1311
	2019-143107	Fitness Centre Manager	Health Club Manager, Gym Manager, Fitness Centre Administrator, Sports Club Manager	Bursary and Internship	6	219	230
Sport, Recreation and Fitness	2019-342301	Fitness Instructor	Physical Training Instructor, Aerobics Instructor, Physical Fitness Trainer, Health and Fitness Instructor, Aquarobics Instructor, Gym Instructor/Trainer, Gymnasium Attendant, Physical Education Officer, Physical Activity Coordinator, Fitness Centre Worker, Fitness Consultant/Trainer/Instructor, Personal Trainer	Skills Programme: Fitness Instructor	5	659	692
	2019-342204	Sport Coach	Diving Coach, Callisthenics Instructor, Show Jumping Instructor, Diving Instructor (Open Water), Football Coach, Martial Arts Instructor, Dive Master, Snowboarding Instructor, Water Polo Coach, Gymnastics Coach or Instructor, Tennis Coach, Athletic Coach, Snorkelling Instructor, Swimming Coach or Instructor, Polo Coach, Dressage Instructor, Squash Coach, Cricket Coach, Scuba Instructor, Surface Supply Breathing Apparatus (SSBA) Instructor, Equine Tutor/Riding Instructor, Skiing Instructor, Snowsport Instructor, Basketball Coach, Rhythmic Gymnastics Coach	Learnership: Further Education and Training Certificate: Sport Coaching: Juniors/ Beginners	4	11	12
	2019-143108	Facility Centre Manager	Riding School Manager, Golf Course Manager, Gymnasium Manager, Sport Stadium Manager, Leisure Centre Manager, Indoor Sports Centre Manager (Squash, Tennis, Ten Pin Bowling etc), Aquatic Centre Manager	Bursary and Internship	6	2	2

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2020*
Tourism and Travel Services	2019-141201	Travel Consultant	Inbound Tour Manager, Travel Agent Representative, Travel Consolidator, Booking Travel Clerk, Travel Reservation Clerk, Travel Officer, Travel Arrangements Manager, Travel Agent, Travel Clerk, International Travel Consultant, Domestic Travel Consultant, Travel Wholesaler	Learnership: National Certificate - General Travel	5	683	717
	2019-122101	Sales and Marketing Manager	Key Account Manager, Insurance Sales and Marketing Manager, Business Development Manager, Business Support Manager	Bursary and Internship	6	177	186
	2019-122105	Customer Service Manager	Client Services Advisor, Client Services Manager/ Representative, Client Services Manager, Customer Services Engineer, Customer Care Manager/ Representative	Skills Programme	3	53	56
	2019-333201	Events Manager	Functions Manager, Exhibition Organiser, Event Planner, Marketing Campaign Organiser, Conference and Event Organiser, Destination Manager, Government Protocol or Civic Event Organiser, Exhibition Director, Function Planner, Wedding Planner, Trade Fair Manager, Social/Life Cycle Coordinator, Conference Planner	Bursary and Internship	6	15	16
	2019-251102	Data Scientist	N/A	Bursary and Internship	7	2	2
	2019-431101	Accounts Clerk	Creditors Clerk, Accounts Payable or Receivable Clerk Debtors Clerk, Accounting Clerk, Account Coordinator/ Controller, Billing Administrator/Representative/Officer, Assets Clerk/Coordinator, Ledger Clerk Audit Clerk, Settlement Clerk/Officer	Learnership	3	8	8

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2020*
ALL	2019-862202	Handyperson	Handy Person, Hotel Yardperson, Hotel Useful, Handy Man	Workplace (SIPS)	3	93	98
	2019-134903	Small Business Manager	Owner Manager, Entrepreneurial Business Manager	Bursary: Management Development programme	6	88	92
	2019-441903	Program or Project Administrators	Senior Officer, Project Programme Specialist, Support Officer, Project Coordinator, Course Coordinator, Administrator, Administration Officer, Assistant Secretary of The Cabinet, Strategic Support Officer, Project Corrections Operations Advisor/Coordinator, Programme/Project Coordinator, Project Planner, Project Controller, Project Advisor/Leader, Consents Officer/Clerk	Workplace (SIPS)	5	80	84
	2019-112101	Director (Organisation)	Managing Director (Enterprise/Organisation), Chief Executive Officer (CEO), Deemed (Shadow) Director, Company Director, Independent Non-executive Director, Managing Director, Senior/Lead Independent Non-executive Director, Alternative Director, Non-executive Director, Executive Director	Bursary: Business Administration	7	71	75
	2019-733201	Truck Driver (General)	Lorry Driver, Freight Operator, Livestock Hauler, Dumper Truck Driver, Tilt Tray Driver, Compactor Driver (Rubbish Collection), Logging Truck Driver, Road Train Driver, Cement Mixer Driver	Workplace (SIPS)	4	36	38

ANNEXURE 2

CONTINUOUS IMPROVEMENT PLAN



ANNEXURE 2: CONTINUOUS IMPROVEMENT PLAN

AUTHORISATION OF THE SECTOR SKILLS PLAN CONTINUOUS IMPROVEMENT PLAN

I, the undersigned, hereby approve, on behalf of the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA), the contents of the Sector Skills Plan Continuous Improvement Plan for the period 2021 – 2022 financial year.

Approved By:



Mr Marks Thibela

Chief Executive Officer



Mr David Themba Ndhlovu

Accounting Authority Chairperson



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1. INTRODUCTION

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

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

2. CIP MATTERS

The following table details CIP matters which the SETA has addressed during the 2021/22 – 2022/23 period and plans which the SETA aims to implement in the current financial year.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
Research Agenda and Strategy	The CATHSSETA research agenda for the Financial Year 2021/22, focuses on the following topics: Sector Analysis for Arts, Culture and Heritage (ACH), and Sports, Recreation and Fitness (SRF) sub-sectors Impact of Covid-19 on CATHSSETA sub-sectors Feasibility Study: Implementing E-Learning in the Sector From the 2020/21 research agenda, the following studies are currently underway: Tracking and Tracing study Skills Forecasting Study: Fourth Industrial Revolution (4IR) HEI Partnership: Sector Analysis: Gaming and Lotteries	Terms of References for both Impact of COVID-19 on CATHSSETA-sub-sectors and Sector Analysis research studies have been prepared and are under the supply chain process. A project plan has been drafted for the Feasibility Study, which will be carried out by the internal research team. The Tracking and Tracing study on programme beneficiaries is currently on the primary data collection stage and findings from this study will be uplifted in the 2023/24 SSP update. The project is scheduled to end in January of 2022. The SETA is conducting in-depth interviews with learners funded by CATHSSETA on the following interventions from the 2015/16 – 2018/19 financial years: Learnerships • Internships • Apprenticeships • Bursaries • Skills Programmes • Work Integrated Learning (WIL) TVET • University Placement The employers involved in the implementation of the learning programmes will also be interviewed on their experience of rolling out these interventions and any improvements they can offer for future interventions. The skills forecast study: 4IR is on the primary data collection stage where experts and sector stakeholders are interviewed on their perception on the 4IR and the challenges, disruptions, opportunities and skills implications that the 4IR will bring on the 6 CATHSSETA sub-sectors. The findings from this study will also be uplifted in the next SSP update as the study is scheduled to end in September of 2021. s	CATHSSETA plans to appoint service providers to conduct the following studies: Sector Analysis for Arts, Culture and Heritage (ACH), and Sports, Recreation and Fitness (SRF) sub-sectors Impact of Covid-19 on CATHSSETA sub-sectors CATHSSETA will explore and initiate partnerships with other public entities/ government departments/higher education institutions aligned to the SETA's research priorities. CATHSSETA shall establish a Research Reference Group to engage industry experts and researchers in the sector on research methodology, instruments, and reports as designed and produced by the SETA. The SETA is closely monitoring the studies which are currently underway. As part of the project monitoring, the service providers are required to submit bi-weekly project progress reports. The CATHSSETA research team has also scheduled bi-weekly status update meetings with the appointed service providers to be kept abreast with any challenges they encounter and ensures that they are mitigated swiftly.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
Collaboration with Universities and TVET Colleges	Of the 43 TVET Colleges across 55 campuses offering National Certificate vocational (NCV) in Hospitality and Tourism, some of the TVET Colleges have obtained approval from CATHSSETA to offer CATHSSETA-accredited NQF-aligned qualifications. CATHSSETA has signed MoUs with various TVET Colleges to offer Bursaries, Learnerships, Experiential Learning, and to participate in the review of Sector-related Qualifications. To enhance service delivery and improve partnerships with TVET colleges, CATHSSETA has established regional offices situated in the premises of Northlink and Umgungundlovu TVET colleges. During the 2020/21 financial year, CATHSSETA partnered with the University of Witwatersrand to conduct a research study on the Gaming and Lotteries sub-sector.	In line with the White Paper on Post School Education objective of expanding access and increasing diversity in the PSET sector, CATHSSETA entered into a R10 million contract to fund 80 TVET College students and 60 HEI learners studying towards qualifications in line with the occupations in high demand identified in the CATHSSETA SSP. CATHSSETA funded TVET Colleges and CETs to upgrade the infrastructure used by students studying qualifications in the CATHSSETA sub-sectors. The infrastructure projects funded included the following: upgrade of the hospitality facility, renovation of the kitchen infrastructure for hospitality students and baking equipment. The study on the sector analysis: Gaming and Lotteries has been concluded. The Results from the study reveal that, despite the general drop in the number of operators in the Gaming and Lotteries sub-sector between 2016 to 2020, there were some encouraging developments in operational performance. The SSP provides a detailed analysis on the findings that have emanated from this study, and the recommendations that emanated from the findings being deliberated by the CATHSSETA board and Management for implementation during the next financial year.	The SETA will continue to partner with TVET colleges and higher education institutions for the achievement of the SETA's strategic priorities and NSDP outcomes. New partnerships will include extending existing partnerships with institutions involved in sector research, WIL programmes, strengthening skills development initiatives, youth and women empowerment, and career guidance support. Recommendations made against the findings from the HEI partnership are currently being deliberated by the CATHSSETA Accounting Authority together with Management for implementation during the next financial year.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
Improving Data Sources	CATHSSETA has an electronic data management tool, the CATHSSETA Information Management System (CIMS), for the processing of Mandatory Grant application. CIMS is also used as a data-storage and reporting facility. CATHSSETA consulted various sources, including national data sources, the Higher Education Management Information System (HEMIS), maintained by the DHET, publications and reports of the World Travel and Tourism Council, National Gambling Board, South African Tourism, tSA and stakeholders from all sub-sectors. The SETA conducted the following research studies during the 2020/21 financial year to contribute to the update of the SSP: The Extent of Active Labour Unions in the CATHSSETA Sub-sectors Sector Analysis: Gaming and Lotteries Sub-sector Effect of COVID-19 on CATHSSETA sub-sectors	Following the submission of the first draft 2022/23 SSP, the SETA received the employer interview guide from DHET. The guide was used to conduct key informant interviews to triangulate results from the Mandatory Grant application data to inform the update of the SSP. The results of the key informant interviews have been incorporated in the final SSP update. As part of the SETA's research efforts, stakeholders are heavily consulted in research projects that the SETA undertakes. Stakeholders are continually requested to provide input and improvements to better serve them.	SETA plans to continue to produce sector analysis reports, which are essentially an equivalent of mini SSPs for each of the 6 CATHSSETA sub-sectors. This will ensure an even data representation across the 6 sub-sectors, and it will provide the SETA with a comprehensive analysis of the sector. The SETA further plans to establish a Research Reference Group made up of industry experts and academics with knowledge in the CATHSSETA sub-sectors and research. The Reference Group shall play an advisory role in providing expert guidance on research studies, data collection methods and any other research outputs of the organisation.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
Organising Framework for Occupations (OFO) and Sector PIVOTAL list	CATHSSETA complies with the use of OFO version 2019, which is the most current version. In February 2020, the Research, Planning Performance Unit conducted a Baseline Study to find out to what extent the CATHSSETA Sector understands the purpose of the OFO. The team used the platform to inform stakeholders about the importance of submitting the correct OFO codes, and to capacitate stakeholders on the OFO Guide.	The use of the 2019 OFO codes is reflected in all applicable documents, including Skills in High Demand, the Sectoral Priority list, as well as Mandatory Grant Application data.	The SETA will be sending out a call for inputs on the update of sector OFO codes by stakeholders in preparation for the publication of the 2021 OFO code update. In the 2021/22 financial year, CATHSSETA plans to conduct stakeholder engagements to raise awareness on the use of the OFO and collaborate with industry to update CATHSSETA related occupations in the OFO.
Developing Mechanisms for Skills Planning and LMIP	CATHSSETA has developed and employs various mechanisms for skills planning, including increased partnership, stakeholder consultations, increased research initiatives to assess skills' requirements of the sector and the impact of learning interventions. SETA identified various platforms to disseminate research recently undertaken in the sector. Internal stakeholders are consulted for their input, which also involves translation of the Skills Development Priorities into Key Performance Indicators (KPIs) for the SETA.	Internal stakeholders, including the relevant governance structures and the Accounting Authority, have been consulted in the final update of the SSP and endorsed the document for approval.	Consult and solicit input through the relevant Board structures in preparation for the next SSP update. The Research team will participate in Mandatory Grant workshops to promote the importance of submitting quality Mandatory Grant data which is the primary data source for skills planning.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
Alignment with Government priorities	CATHSSETA's strategic priorities are aligned and developed in line with the Primary Guiding Priorities of DHET, as well as taking into consideration sub-sector strategies and plans relevant to each of the sub-sectors.	Key Policy drivers have been identified and considered in the 2022-2023 SSP, which include the Tourism Recovery Plan, Covid-19 Economic Recovery and Reconstruction Plan (ERRP), the National Digital and Future Skills Strategy, National Development Plan, the White Paper for Post-School Education and Training, SETA Grant Regulations and NSDP. Further sub-sectoral specific plans considered include the Department of Arts and Culture (DAC) Strategy, the National Sport and Recreation Plan (NSRP), the National Tourism Sector Strategy (NTSS), the Tourism Human Resources Development (THRD) Strategy, the Lotteries Act 32 of 2013, and the Department of Environmental Affairs (DEA) Strategy. These Government priorities and strategies have been taken into consideration in developing the final CATHSSETA 2021 – 20225 SSP Priorities.	CATHSSETA continuously reviews all relevant strategies and plans and utilises all updates/changes to guide the development of SETA's strategic priorities. The SETA plans to incorporate priority actions identified in the ERRP and the upcoming DHET Economic Recovery Skills Strategy in the update of the CATHSSETA 2022/23 Strategic Plan and Annual Performance Plan.
Research Capacity in the System	During the 2020/21 financial year, CATHSSETA went through an organisational realignment. The Research Agenda and Strategy currently falls within the scope of the Research, Planning and Performance unit under the Research, Monitoring and Evaluation department. The Unit consists of the Specialist: Research, Planning and Performance, Analyst: Planning, Performance Coordination, and Analyst: Research and Sector Skills.	During the 2020/21 financial year, the SETA has partnered with an HEI and industry experts to assist in carrying out the research agenda.	As part of increasing research capacity and in order to improve data sources, CATHSSETA will be initiating partnerships in the 2021/22 financial year with HEIs and other public entities in line with the research priorities of the SETA. The SETA will also be establishing a Research Reference Group to provide guidance on sector research projects.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
Career Advice System	Each CATHSSETA sub-sector prepares career guides in order to inform potential learners of qualifications, skills programmes and learnerships available, as well as the entry-level requirements for each occupation. During the last three years, CATHSSETA has aimed to reach potential learners, in order to disseminate information on Learning Programmes. SETA participates annually in national events, such as, the National Tourism Council Expo and Africa Travel Indaba. CATHSSETA, in partnership with the National Department of Tourism (NDT) and a host Provincial Tourism Department, hosts the Annual National Tourism Careers Expo (NTCE) which creates a highly interactive platform for the promotion and identification of tourism careers, job and entrepreneurial prospects.	A total of 6 Career Guidance Interventions were attended by CATHSSETA in 2020/21 due to Covid-19.	With the restrictions eased up, though with limited numbers, a total of 14 career guidance events are planned for the 2021/22 financial year. Plans are underway for the annual NTCE which will now be held virtually.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
The role of the Accounting Authority in the Development of the SSP	The 2022/23 SSP was presented to the Accounting Authority, and inputs from the engagement have been taken into consideration and actioned prior to submission. Relevant Accounting Authority structures, such as the Governance and Strategy committee was consulted to provide input into the development of the 2022/23 draft SSP. The role of the Governance and Strategy Committee is to provide expert advice on the sector, to facilitate and enable broad sub-sector specific stakeholder consultation and participation, and to give advice on priority skills' requirements for sub-sectors.	The Accounting Authority endorses the final SSP as per recommendations by the relevant committees.	The Governance and Strategy Committee and the Accounting Authority, are integral in providing relevant sector-specific insight to the CATHSSETA, and will continue to provide input on the first and final draft of the SSP.
Stakeholder engagement in the preparation of the SSP	Both internal and external stakeholders are consulted as part of the internal research process and/or research studies that have been commissioned from the service providers.	In-depth interviews have been conducted with the key role players in the various sub-sectors in June – July 2021.	SETA aims to continuously engage with stakeholders as part of the research efforts that SETA undertakes in the updating of sector information. Each of the research agenda studies planned by the SETA involve in-depth consultations with sector stakeholder to ensure the SSP is a true reflection of industry skills needs.

3. CONCLUSION

This document has outlined the CIP matters and the plans the SETA has to address the issues identified. The SETA has made significant progress in stakeholder engagements for all the sub-sectors during the consultation period prior to the final SSP submission of 2021/22. This has also improved data sources. The initiation of research partnerships is underway, and we expect that these partnerships will further improve the SETA's research capacity. The SETA has put in place governance structures, including an Accounting Authority comprising of government, sub-sector, employer, and labour organisation representatives. This SSP was presented to the Accounting Authority and its sub-committees for input and approval

ANNEXURE 3

RESEARCH AGENDA



AUTHORISATION OF THE RESEARCH AGENDA

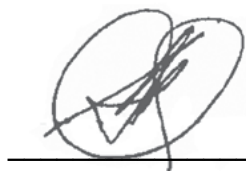
I, the undersigned, hereby approve, on behalf of the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) the contents of the Research Agenda for the 2021/22 period.

Approved By:



Mr Marks Thibela

Chief Executive Officer



Mr David Themba Ndhlovu

Chairperson of the Board

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ACRONYMS

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

1. INTRODUCTION

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

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

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

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

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

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

The Unit plays an integral role in gathering statistical data and other relevant information about the labour market, skills needs and training provision. Such information is essential in planning, in order to meet the country's skills needs and to guide investment in the provision of education and training. The Unit is further responsible for producing the Strategic Plan (SP), Annual Performance Plan (APP) and Sector Skills Plan (SSP). The unit also conducts all research studies, establishes research partnerships and coordinates research conferences and all skills development and planning activities.

2. THE IMPORTANCE OF RESEARCH

The research agenda contributes to providing sector-specific intelligence on the supply and demand of labour in the CATHSSETA sub-sectors, as well as other pertinent issues that are of interest to the SETA. Research is used as a planning tool and assists in the formulation of strategies, projects and interventions to ensure that the SETA is responsive to the needs of the sector and targeted beneficiaries. Through evaluation studies, the SETA is able to assess its performance against predetermined targets, including the implementation and outcomes of learning programmes.

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

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

3. PURPOSE OF THE RESEARCH AGENDA

The Research Agenda sets out the research needs of CATHSSETA for the period from the 1st of April 2021 to the 31st of March 2022. Research is key component in providing evidence-based strategic planning and aligning CATHSSETA interventions to the outcomes and principles of the National Skills Development Plan (NSDP, 2030). The purpose of the Research Agenda is to help organise and prioritise research requests, and to improve the quality of the data and information available within the CATHSSETA sector. It provides a mechanism for building research capacity, and also as a guide for the allocation of resources for research and the strategic actions that will be undertaken to achieve the stated goals.

3.1. The Concept of Research

For the purposes of the Research Agenda, the term “research” is taken to mean rigorous and systematic enquiry and analysis. As such, research may be empirical or theoretical, quantitative, or qualitative and applied or basic. It involves collection of data from various sources and analysing same in order to reach certain conclusions.

3.2. The Nexus of Research Policy

The relationship between research, evidence-based policy decision making, and practice is a complex one. How relevant knowledge is generated, disseminated, and institutionalised by both decision-makers and



implementers needs to also be investigated. Research provides much-needed insight into the CATHSSETA sector, its workings, and skills requirements. The ability of research to influence policy and practice is often indirect and long-term. On a year-on-year basis, research makes valuable contribution to the SETA's understanding of the sector, and broader post-school education and training system in South Africa. Research outputs contribute to ensuring that the SETA is working towards increased access to quality and relevant skills development interventions, in order to fulfil the economic and social goals of inclusive participation, as set out in the National Development Plan (2030).

There is a need for a sustained dialogue between researchers and the users of research, in cultivating a practice of employing research-based evidence in the policy process.

3.3. Research Capacity

The nature of research may vary in complexity and scale. CATHSSETA aims to achieve the priorities of its research themes/topics within the scope of its financial resources, as follows:

- Internal research: The Research, Planning and Performance unit is responsible for conducting various research studies within the research capacity and budget of the SETA.
- Commissioned research: Research commissioned through the appointment of research partners and service providers, with Terms of Reference specified by CATHSSETA, as part of the research theme/topic/priority outlined in this Strategy.
- Research Partnerships: Research projects undertaken in partnership with other public entities or government departments aligned with CATHSSETA's research priorities. These entities could be other SETAs or parastatals.
- Postgraduate Research Partnerships: Partnerships with public South African Universities by means of Memoranda of Understanding, which outline both research collaboration areas and research grants. Postgraduate students from the identified universities will receive research grants to carry out research in areas pertaining to skills development and training, as well as to broader topics relevant to the CATHSSETA sector. CATHSSETA research partnerships will focus on proposing and supporting a university-based research programme that will:
 - Refine and, where necessary, develop new methods for collecting sector skills information that can be used on an ongoing basis for improved skills planning;
 - Gather and analyse sectoral information in order to establish baselines or updates on current information, using rigorous processes that can then be applied, on an ongoing basis, for improved skills planning;
 - Study particular issues that are currently proving to be bottlenecks, in as far as CATHSSETA, and other post-school education and training institutions are able to meet their mandate, and provide practical frameworks, guidelines or 'maps', wherever appropriate;
 - Evaluate and pilot skills development initiatives in order to inform further roll-out, adaption or step-changes;
 - Produce practical reports (in addition to academic theses) in order to inform sector skills development initiatives;

- Contribute to the strengthening of recognised Centres of Expertise in Human Capital Development within the respective sub-sectors;
- Contribute to the building of a cadre of high-level Human Capital Development Skills Specialists in the country to seed the expansion of Human Capital Development Expertise into sector organisations and universities; and
- Disseminate information on achievements by the SETA, so as to showcase the SETA's work in the country.

4. RESEARCH PRIORITIES

The 2020/21 – 2024/25 SSP has identified the following key skills development priorities for the sector:

- Fourth Industrial Revolution
- Training provision
- Analysis of skills needs
- Increased partnerships to include worker -initiated interventions
- Sector transformation
- SMME interventions and green economy (resource efficiency)
- Monitoring and evaluation
- Addressing Occupational Shortages and Skills Gaps
- Technological advancement to combat impact of Covid – 19 Pandemic

All research conducted or commissioned by CATHSSETA is intended to feed into the SSP for strategic planning to address identified skills needs and constraints for effective recruitment, utilisation, and skills development. Table 1 below outlines the Research Agenda items that CATHSSETA intends to conduct in 2021/22.

TABLE 1: RESEARCH OUTPUTS

No.	Name of Study	Purpose of the Study	Main Objectives of Study	Research Mechanism	Valid for the Period	Budget
1.	Sector Analysis for Arts, Culture and Heritage (ACH), and Sports, Recreation and Fitness (SRF) sub-sectors	Provide an in-depth analysis of the ACH and SRF sub-sectors to understand their economic performance and labour market profile and how the sub-sectors have been evolving to identify new trends that will inform CATHSSETA qualifications and programme offerings.	• Provide a detailed analysis of the economic and labour market outlook for the ACH and SRF sub-sectors; • Identify emerging trends and related occupational patterns and skills in the ACH and SRF sub-sectors; • Examine the employer profile of the ACH and SRF sub-sectors. • Examine the employee profile (demographics, skills, and educational levels) of the ACH and SRF sub-sectors; • Identify and provide analysis on the extent of key-role player participation in the ACH and SRF sub-sectors; and • Update of the stakeholder database for the ACH and SRF sub-sectors.	Outsource	July 2021 – December 2021	R500 000
2.	Impact of Covid -19 on CATHSSETA-sub-sectors	Examine the overall impact of Covid -19 on CATHSSETA sub-sectors and its implications for skills development	• Determine and analyse short to long-term effects of Covid -19 on the sector and recommended recovery plans within each sub-sector: a. Analyse the impact of Covid -19 on economic performance and labour market trends in the sector; b. Development trends in education and training as a result of Covid -19 c. Understanding impact of COVID-19 on SMMEs in the sector • Evaluate the Economic Reconstruction and Recovery Plan in response to Covid -19 and its effect on the CATHSSETA sub-sectors; • Analyse short to medium term positive spin-offs of resources and relief funds on assisting the sector; • Analyse access to education and training opportunities during and post Covid -19; and • Analyse how vaccination will affect access to international communities; a. How Travel and Tourism sub-sector will be affected.	Outsource	July 2021 – March 2022	R1 200 000
3.	Feasibility Study: Implementing E-Learning in the Sector	To examine the feasibility of e-learning implementation as an alternative mode of training in the sector.	• Determine the extent to which the sector is ready to roll out e-learning; • Determine and analyse the capacity and resources available to implement e-learning in the sector (I suppose capacity includes skills to do this at institutions of higher learning) • Explore the implications for provider accreditation and qualification review and development. • Understanding policy implications for the SETA; and • Provide recommendations on implications of implementing e-learning in the sector	Internal	July 2021 - November 2021	N/A

5. RESEARCH FUNDING AND PROCUREMENT

- 5.1 The NSDP highlights the importance of partnering with higher education and research institutions, amongst others, for evidence-based understanding of skills demand and supply in the sector.
- 5.2 CATHSSETA will explore and initiate partnerships with higher education and research institutions, so as to meet the research needs of the sector. The SETA will partner with other public entities/ government departments/higher education institutions aligned to the SETA's research priorities.
- 5.3 CATHSSETA shall establish a Research Reference Group to engage industry experts and researchers in the sector on research methodology, instruments, and reports as designed and produced by the SETA.
- 5.4 To support the objectives of the Research Policy, a research grant shall be awarded to a specialised unit or faculty of a public university or a University of Technology (UoT), in order to conduct sector-based research for CATHSSETA.
- 5.5 Research funding shall be sourced from the CATHSSETA Discretionary Grant.
- 5.6 Research projects shall be funded within minimum and maximum thresholds, subject to budgetary availability.
- 5.7 Funding of research shall be for research projects commissioned by CATHSSETA.
- 5.8 CATHSSETA shall issue the Terms of Reference (ToRs) for any research required, in terms of the PFMA and supply chain management processes for public entities. These ToRs serve as guidelines, establish the minimum requirements for research projects as well as research costs to be covered by CATHSSETA.

6. CONCLUSION

This Research Agenda has been developed with the aim of addressing and supporting the eight (8) NSDP outcomes and the nine NSDP Principles, in order to set up a credible mechanism for skills planning for the CATHSSETA sector. The purpose is both to strengthen the organisation's research capacity and to ensure that CATHSSETA serves as a repository of skills development knowledge in the sector. The achievement of these research priorities, through the approaches stated above, will enable CATHSSETA to be acknowledged as the credible authority that it rightfully is, in skills planning and development in the sector.

ANNEXURE 4

COVER LETTER



Enq: Dr T. Umanah
Our Ref: SSP/2021/02
Email: Tebogou@cathsseta.org.za

Ms W. Sikaka
Acting Director: SETA Support and Learnerships
Department of Higher Education and Training
SETA Performance Management
123 Francis Baard Street
Pretoria

Per email: <mailto:Sikaka.w@dhet.gov.za>

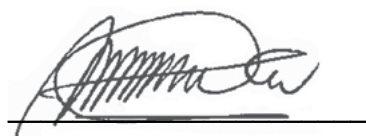
Dear Ms Sikaka

RE: CATHSSETA FINAL SECTOR SKILLS PLAN UPDATE 2022-23

1. The above subject refers.
2. We, the undersigned, on behalf of the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) submit to the Department of Higher Education and Training (DHET) the SETA's Final Sector Skills Plan (SSP) update for the period 1 April 2022 to 31 March 2023. The SSP has been prepared in accordance with the DHET SSP Framework and Requirements Guidelines for submission and the National Skills Development Plan (NSDP) 2030.
3. The COVID-19 pandemic has affected economies and government across the globe. Given the type of sub-sectors the CATHSSETA operates in, we find ourselves as one of the hardest hit economic sectors and most negatively affected by the Pandemic. Consistent with the overall economic performance of the sector, total levies received from employers decreased by 43%, from R406 million in 2019/20 to R233 million in the 2020/21 financial year.
4. One of the areas affected by the decrease in revenue has been the planned CATHSSETA 2020/21 Research Agenda. Due to financial constraints, the SETA was unable to commission an in-depth study on the impact of COVID-19 on the six CATHSSETA sub-sectors. The SETA has had to rely on the internal research team to carry out desktop research on the effects of the Pandemic on CATHSSETA sub-sectors. In the attached 2021/22 Research Agenda, the SETA plans to commission a study to examine the overall impact of COVID-19 on CATHSSETA sub-sectors, and its implications on skills development.

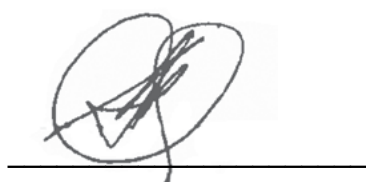
5. Key informant interviews were conducted between June – July 2021. The results of the in-depth interviews have been used to triangulate the findings from the Mandatory Grant application data and final SSP.
6. The updated CATHSSETA Continuous Improvement Plan (CIP); OFO Based 2022/23 Sectoral Priority (previously PIVOTAL) List; 2021/22 Research Agenda; and Mandatory Grant (MG) application data accompany this submission. The findings presented in this SSP were collected using improved data sources such as the Mandatory Grant data and secondary data sources such as DHET publications and PSET reports.
7. The final SSP has also taken into consideration the recommendations and comments received from the DHET SSP evaluation process and CATHSSETA governance structures.

Yours Sincerely



Mr Marks Thibela

Chief Executive Officer



Mr David Themba Ndhlovu

Accounting Authority Chairperson

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