



# SECTOR SKILLS PLAN

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

**2015/16 – 2016/17**


**30 January 2015**

## AUTHORISATION OF THE SECTOR SKILLS PLAN: 2015/16 – 2016/17

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 final Sector Skills Plan for the period 2015/16 - 2016/17.

**Approved By:**

Signature:



Mr. Pumzile Kedama  
The Administrator



Date: 27/01/15

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## ABBREVIATIONS and ACRONYMS

AET	- Adult Education and Training
APP	- Annual Performance Plan
ATR	- Annual Training Report
CATHSSETA	- Culture Arts Tourism Hospitality & Sport Sector Education & Training Authority
DAC	- Department of Arts & Culture
DBSA	- Development Bank of South Africa
DEA	- Department of Environmental Affairs
DHET	- Department of Higher Education & Training
DG	- Discretionary Grant
DOL	- Department of Labour
dti	- Department of Trade and Industry
EE	- Employment Equity
ETQA	- Education & Training Quality Assurance
EWSETA	- Energy and Water Sector Education and Training Authority
FASSET	- Financial & Accounting Services Sector Education & Training Authority
FET	- Further Education & Training
GDP	- Gross Domestic Product
HEI	- Higher Education Institution
HICA	- Hotel Investment Conference Africa
HRD	- Human Resource Development
IDC	- Industrial Development Corporation
ILO	- International Labour Organisation
IPAP	- Industrial Policy Action Plan
LGSETA	- Local Government Sector Education & Training Authority
LSM	- Living Standards Measure
MERSETA	- Manufacturing Engineering & Related Services Sector Education & Training Authority
MG	- Mandatory Grant
MOU	- Memorandum of Understanding
MTEF	- Medium Term Economic Framework
MTSF	- Medium Term Strategic Framework
NAASA	- National Accommodation Association of South Africa
NAC	- National Arts Council
NAMB	- National Artisan Moderating Body
NDT	- National Department of Tourism
NEDLAC	- National Economic Development & Labour Council
NSDS	- National Skills Development Strategy
NSF	- National Skills Fund
NTSS	- National Tourism Sector Strategy
NQF	- National Qualifications Framework
OFO	- Organising Framework for Occupations
OHS	- Occupational Health & Safety
PIVOTAL	- Professional, Vocational, Occupational, Technical & Academic Learning
PSETA	- Public Sector Education & Training Authority

QCTO	- Quality Council for Trades & Occupations
QMR	- Quarterly Monitoring Report
RPL	- Recognition of Prior Learning
SANBI	- South African National Biodiversity Institute
SANParks	- South African National Parks
SASCOC	- South African Sports Confederation & Olympic Committee
SAQA	- South African Qualifications Authority
SETA	- Sector Education & Training Authority
SIC	- Standard Industrial Classification
SIPs	- Strategic Integrated Projects
SMME	- Small Medium Micro Enterprises
SRSA	- Department of Sports & Recreation South Africa
SP	- Strategic Plan
SSP	- Sector Skills Plan
THETA	- Tourism Hospitality & Sport Education & Training Authority
TSA	- Tourism Satellite Account
TVET	- Technical and Vocational Education and Training
UIF	- Unemployment Insurance Fund
UNTWO	- United Nations World Tourism Organisation
UoT	- University of Technology
WRSETA	- Wholesale & Retail Sector Education & Training Authority
WSP	- Workplace Skills Plan
WTTC	- World Travel & Tourism Council
WWF	- World Wildlife Fund

## **INTRODUCTION**

The Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) submits to the Department of Higher Education and Training (DHET) the CATHSSETA Sector Skills Plan (SSP) for the period 1 April 2015 to 31 March 2016. The SSP has been prepared in accordance with the guidelines included in the National Skills Development Strategy (NSDS) III for the period 2011 to 2016, as well as the DHET SSP guidelines: Requirements for SSP submission 2014/15 (issued on 13 June 2014).

The main purpose of the SSP and the annual SSP updates are to provide an overview of the sector served by CATHSSETA, to analyse the demand for and supply of skills to the sector and, on the basis of this analysis, to determine the skills needs and the skills development priorities for the sector. Strategies for addressing these skills needs and the skills development priorities of the sector, as well as meeting the NSDS III goals and targets, also form part of the SSP.

The SSP draws on information collected through the reported and planned training interventions template of the Mandatory Grant application submissions as well as various research papers and projects commissioned either by CATHSSETA or sector stakeholders in order to identify skills trends that influence the sector. Furthermore, the SSP incorporates outputs from the CATHSSETA stakeholder consultative processes.

Consultations have been held with stakeholders following the submission of the second draft SSP to solicit further input and obtain peer review for inclusion in the final SSP. These consultations included focus group discussions with bargaining councils, employers, government departments, industry associations, professional bodies and trade unions in the sector.

## **SYNOPSIS**

The Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority has, since the 1<sup>st</sup> of April 2011, been implementing the National Skills Development Strategy (NSDS) III in its sector. The Arts, Culture and Heritage sub-sector was combined with the scope of the Tourism, Hospitality and Sport Sector Education and Training Authority (THETA), the reason for this inclusion was to align all the logical sub-sectors that are related to the tourism sector, to allow for improved skills planning over the next 3 years so that the full value of the arts, culture, environment, tourism, hospitality, heritage and sport value-chain could be derived for both the benefit of the South African economy and its citizens.

The key policy drivers that have been identified are the National Development Plan, the White Paper for Post School Education and Training, the SETA Grant Regulations and NSDS III. The nature, scope and size of the CATHSSETA sector are extremely vast and varied and labour market analysis of the skills requirements of the sector is complex due to the lack of accurate and valid data. This is further compounded by the fact that Workplace Skills Plan and Annual Training Report data for the sector is very limited as the majority of employers are Small and Micro Enterprises (SMEs) and are therefore exempt from this process. To counteract and overcome these challenges, CATHSSETA together with relevant National and Provincial Government Departments in the sector have planned and are currently implementing various research projects to ensure that there is sufficient data for

the sector to conduct an accurate labour market and skills needs analysis. These projects include research grants to Universities to conduct research into the size, employment and economic contributions of the sub-sectors in CATHSSETA's scope, research colloquiums per sub-sector aimed at providing a platform for interaction and review of sector specific research, workshops and focus group discussions with a particular emphasis on skills supply and demand and Provincial SSPs intended to provide a provincial skills audit. A review of sector specific Further Education and Training (FET) Curriculum and more specifically the National Certificate Vocational (NCV) in Hospitality and Tourism is currently in progress through a partnership with UMALUSI. CATHSSETA is currently in the process of appointing research providers and through partnerships with these providers, further research into career pathing, training provision and assessing the impact of CATHSSETA interventions will be undertaken.

The analysis of the demand and supply of skills within the sector is assessed utilising the Mandatory grant application data, inputs from focus group discussions with stakeholders engaged in the sector, inputs from workshops held with public entities, government departments, NGOs, CBOs, Trade Unions and employers. The analysis and interpretation of these consolidated inputs are further enhanced with the research conducted by CATHSSETA and its partners.

The data analysis was conducted in the following manner (a) data was checked and validated and missing values were identified and addressed; (b) validated data was organised for exploratory analysis; (c) descriptive statistics were produced including mean, standard deviation and minimum and maximum values for identified variables; (d) categorical data was used to conduct qualitative analysis; (e) use of historical data derived from analysis of previous period's Reported and Planned Training Interventions data; (f) Analysed data has been presented as tables, graphs and summary statistics and (g) trend analysis based on historical data combined with chamber and consultation inputs for comparison across different categories and over various time periods.

Recognition of priority skills are founded on the occupations identified as scarce skills. The identified scarce skills are a function of two determinants; the number of vacancies in the sector and the degree of scarcity of the identified vacancies. This function was developed on the basis of the behavioural relationship between vacancies and scarcity, to scarce skills.

Demand estimates were calculated through time-series forecasts that use the time-ordered sequence of historical observations on a variable to develop a model for predicting future values of that variable. The simplest time-series forecast was a linear trend forecast where the generating process was assumed to be the linear model:  $t_i = t_0 + a\% \times i$ ,  
whereby  $t_i$  = future value of skills demand;  $t_0$  = skills demand at time 0;  $i = [1,2]$  and  $a$  = average percentage increase (best fit).

The age profile of the sub-sector reveals that 54% of the employees fall within the under 35 years age grouping, 41% fall within the 35-55 years age category and 5% in the over 55 years age group. In terms of racial profiling, of the 179 690 employees who are employed in the sector, 71% (128 075) are African, 12% (21 369) are Coloured, 3% (5 546) are Indian and 14% (24 700) are White. The number of disabled employees as reported in the Mandatory grant information provided to CATHSSETA shows that the sub-sector employs approximately 0.35% of disabled people. The predominance of female and black employees are by no means indicative of transformation or gender equality in the sector. Further examination of these occupations and interpretation of the demand

and supply of skills indicates a high concentration of female and black employees at entry and junior level positions within the sector. CATHSSETA, through the implementation of the 7 Key Developmental and Transformational Imperatives in its interventions are encouraging and driving transformation in the sector.

CATHSSETA has developed 17 Programmes within its Strategic Plan and Annual Performance Plan that aim to address the skills needs and the skills development priorities of the sector, as well as meeting the NSDS III goals and targets.

## 1. SECTOR PROFILE

The scope of a SETA is based on the Standard Industrial Classification of all Economic Activities (SIC) codes. The SETA landscape for NSDS III is described in the Government Gazette<sup>1</sup> of November 2010 and placed 62 SIC codes in CATHSSETA's scope. CATHSSETA has clustered the SIC codes in its scope into six logical areas. The sub-sectors are Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness and Tourism and Travel Services<sup>a</sup>.

In the five sub-sectors, with the exception of the Gaming and Lotteries sub-sector, there is a heavy dependence on donor funding and volunteerism. Seasonality and job instability combined with low-pay, long working hours and lack of clear career paths are some of the characteristics of the sector. In general, the majority of employees within the sector are youth and jobs in the sector are often seen as transition jobs.

### 1.1 Scope

- The **Arts, Culture and Heritage** sub-sector consists of production of arts, crafts designer goods and souvenirs, casting for film, television and theatre, dramatic arts, entertainment, museum activities, monuments and the preservation of historical sites and buildings, management and operation of museum, cultural and heritage activities, music and theatre, as well as arts councils and their activities.
- The **Conservation** sub-sector includes hunting & trapping, activities of conservation bodies, game parks, reserves, wild life parks, zoological establishments and botanical gardens as well as wildlife conservation.
- The **Gaming and Lotteries** sub-sector consists of gambling, licensed casinos, the National Lottery, operation and management of horse racing events, clubs and academies, totalisators, bookmakers, limited payout machines (LPMs) and bingo operators.
- The **Hospitality** sub-sector comprises hotels, motels, boatels and inns, guest houses and guest farms, bed and breakfasts, management and operation of game lodges, caravan parks & camping sites, restaurants and tearooms with or without liquor licenses, fast food establishments, take away restaurants, caterers and catering services, timesharing and bioscope cafes.
- The **Travel and Tourism** sub-sector consists of inbound and outbound tour operators, safaris and sightseeing bus tours and trip operators, inbound international flights, travel agencies, renting of land transport equipment, event and conference management, the operation and management of convention centres, tourist information centres, car hire and tourism authorities as well tourist guides including adventure, mountain, river and tourist.

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<sup>a</sup> Full list of SIC per sub-sector list in Appendix A

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

## 1.2 Employer profile

The number and size of entities registered with CATHSSETA have been sourced utilising the CATHSSETA SETA Management System (SMS) and the figures are presented below in table 1.

Table 1: Number and Size of Entities Registered with CATHSSETA

Sub-sector	Size of Entity			Number of entities registered with CATHSSETA	% in the sector
	0-49	50-149	150+		
Arts, Culture & Heritage	1715	42	20	1777	6,60%
Conservation	1221	33	19	1273	4,73%
Gaming & Lotteries	457	20	49	526	1,95%
Hospitality	17601	510	223	18334	68,11%
Sport, Recreation & Fitness	1973	57	25	2055	7,64%
Travel & Tourism	2845	60	47	2952	10,97%
<b>Total</b>	<b>25812</b>	<b>722</b>	<b>383</b>	<b>26917</b>	<b>100%</b>

Source: CATHSSETA SMS 2014

According to Table 1, the Gaming and Lotteries sub-sector has the smallest number of entities that are registered with CATHSSETA. The Hospitality sub-sector consists of the largest portion of the sub-sectors in CATHSSETA's scope, encompassing over 68% of the sector. This is followed by the Travel and Tourism sub-sector with almost 11%.

The growth trend of entities registered per sub-sector is given in Figure 1. The Arts, Culture and Heritage sub-sector indicates an almost flat growth from 2010 to 2013, with a spike in the number of entities registered increasing to more than double in the 2014 period. This may be attributed to the increased engagement with stakeholders in the sub-sector and thus the induced improvement in our database. It is important to note that this increase in numbers may not specifically imply an increase in the number of employers. The Conservation, Gaming and Lotteries and Sport, Recreation and Fitness sub-sectors have remained at an approximate flat growth from year to year. The Hospitality sub-sector exhibits a continuous growth trend for the past 5 years. Finally, the Travel and Tourism

sub-sector experienced a surge in the number of entities registered with CATHSSETA in the 2012 period, with a 44% increase in numbers.

The figure 1 below has been plotted utilising the primary axis for five of the six sub-sectors and the secondary axis for the Hospitality sector only. This is due to the dominance in numbers of the Hospitality sub-sector over the remaining sub-sectors.

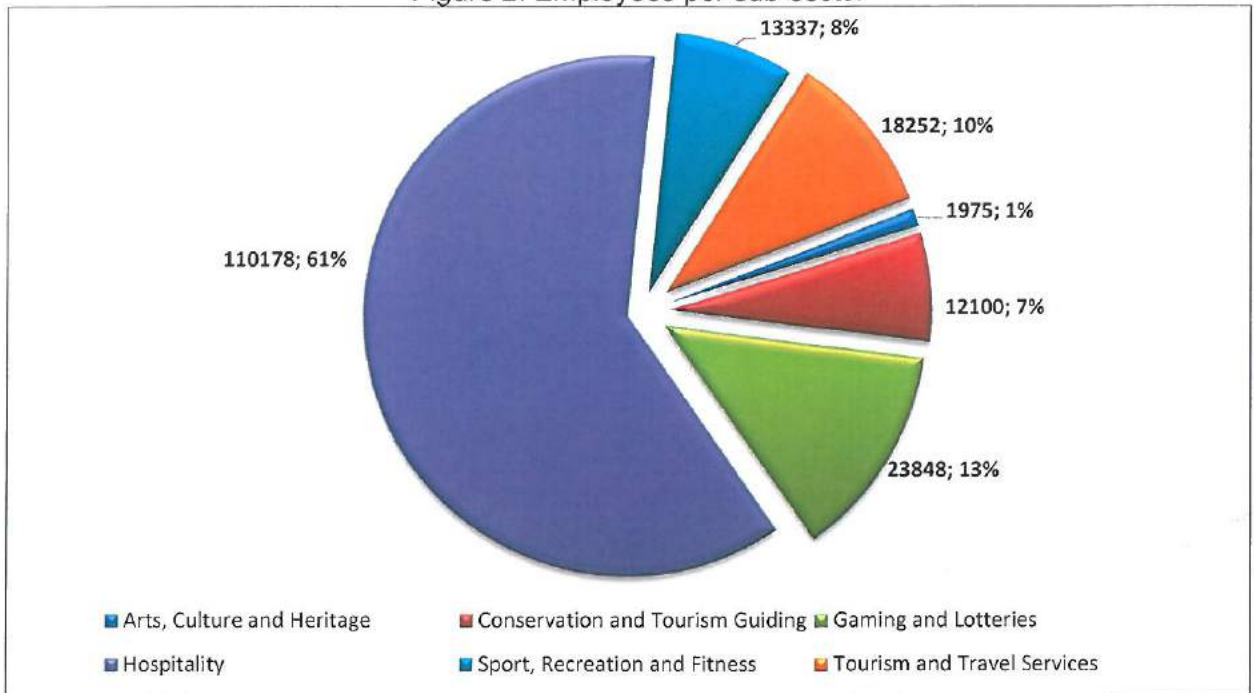


Source: CATHSSETA SMS 2010 - 2014

### 1.3 Employee profile

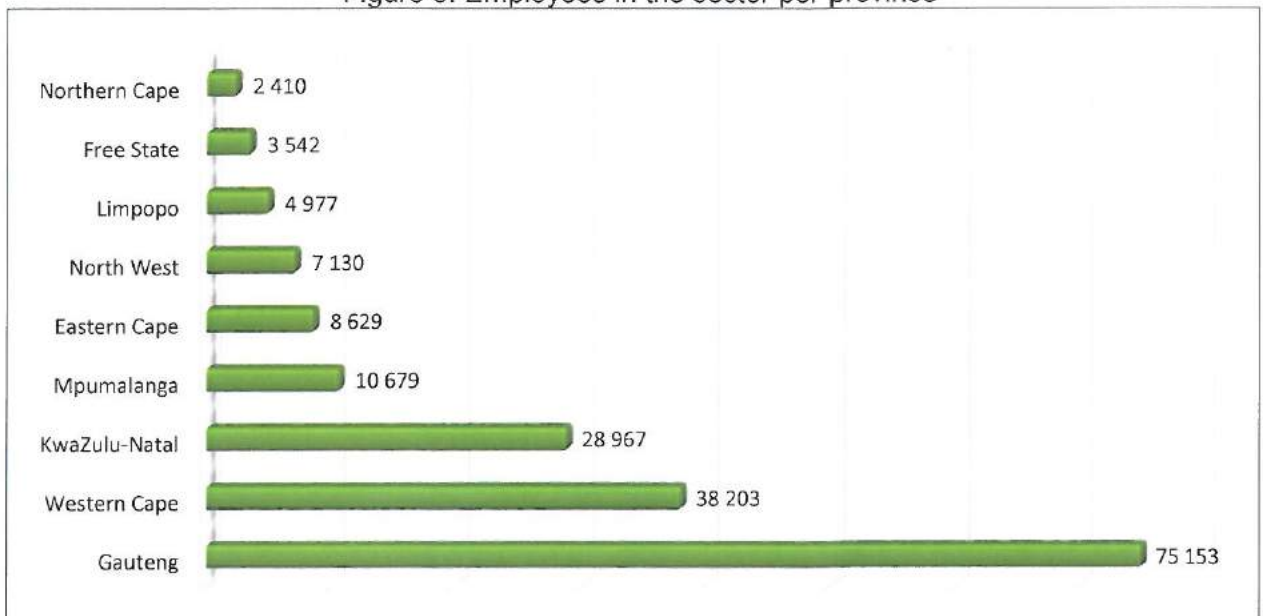
Analysis of the 223 large entities in the Hospitality sub-sector shows that the sub-sector employs over 86% of the workforce in the sector. The Arts, Culture and Heritage sub-sector is the second largest employer within the sector, employing approximately 8%. The remaining 6% of employees are spread approximately equally amongst the other four sub-sectors.

Figure 2: Employees per sub-sector



Source: CATHSSETA SMS 2014

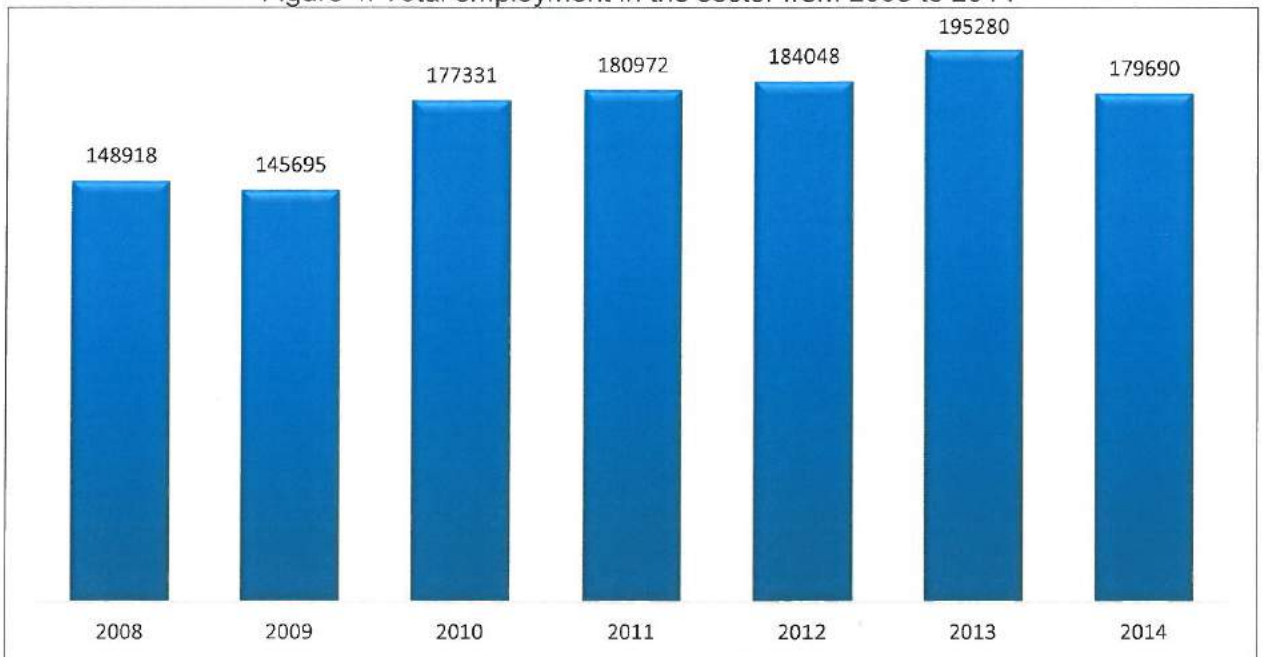
Figure 3: Employees in the sector per province



Source: CATHSSETA SMS 2014

A look at the provincial allocation of employees indicates the highest concentration of 75153 employees in the Gauteng province, followed by the Western Cape and KwaZulu-Natal provinces. Over 79% of total employees in the sector are found in these three provinces.

Figure 4: Total employment in the sector from 2008 to 2014

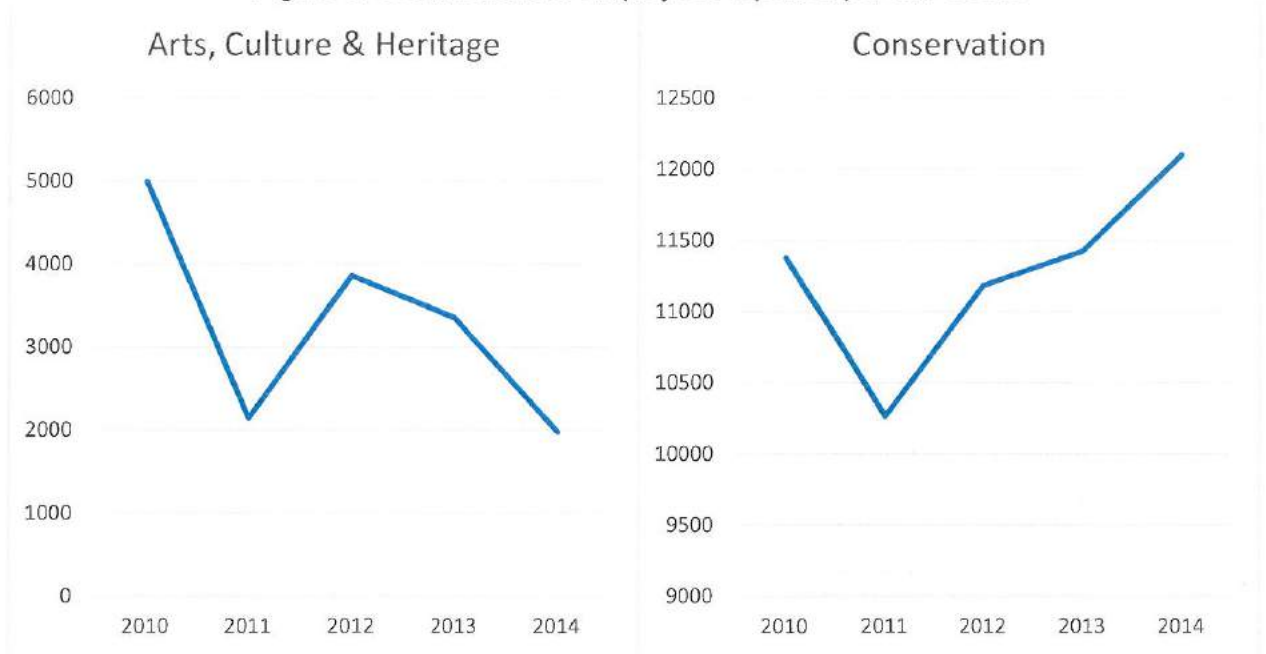


Source: CATHSSETA SMS 2014

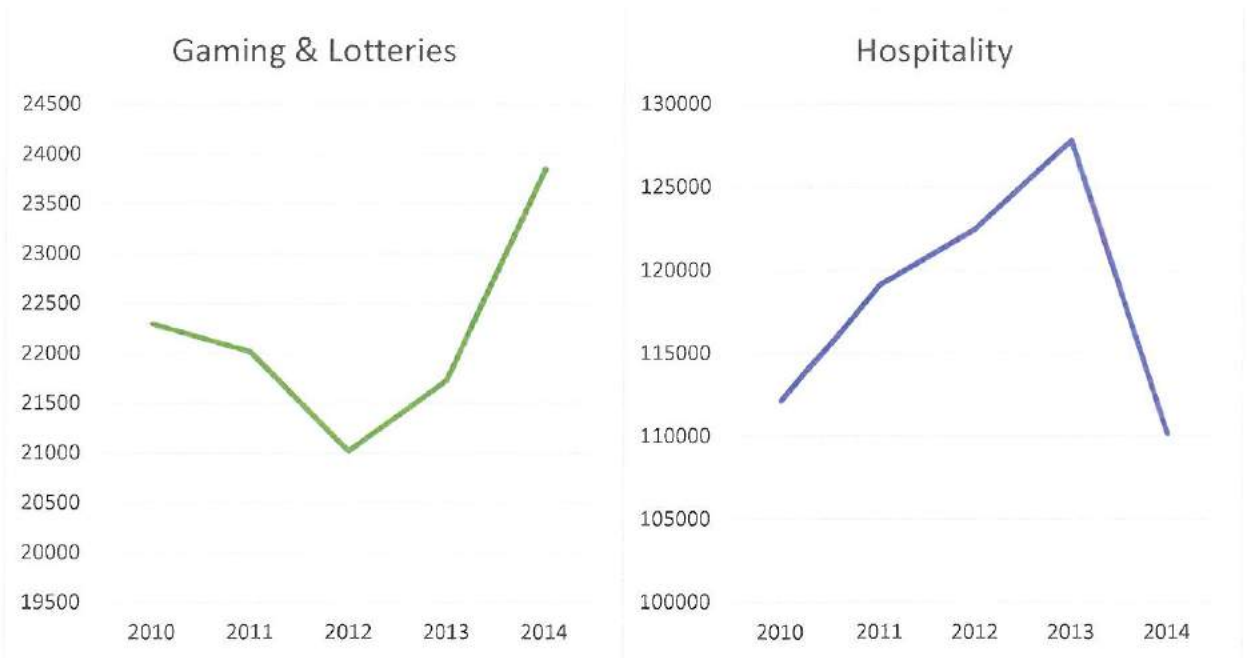
Figure 4 shows the total employment in the sector from 2008 to 2014. There has been a general increasing trend in the number of employees that have been reported. However, there is an estimated 8% decrease in number reported through the Mandatory Grant application process. A possible reason for this decline may be the reduction of Mandatory Grants being paid to employers. Analysis of the Mandatory Grant applications received by CATHSSETA for the 2014 period indicates a reduction in the number of organisations submitting information on their reported and planned training interventions. In 2013, a total of 1336 submissions were received, which has reduced by 17% to 1111 in this period.

In an effort to ensure that such valuable intelligence is not lost, CATHSSETA has embarked on identifying and engaging with those employers whom have not submitted this data to assess and assist in sourcing this information. The results of this process will be seen towards the end of the financial year.

Figure 5: Growth trend of employees reported per sub-sector



Source: CATHSSETA SMS 2010 - 2014



Source: CATHSSETA SMS 2010 - 2014

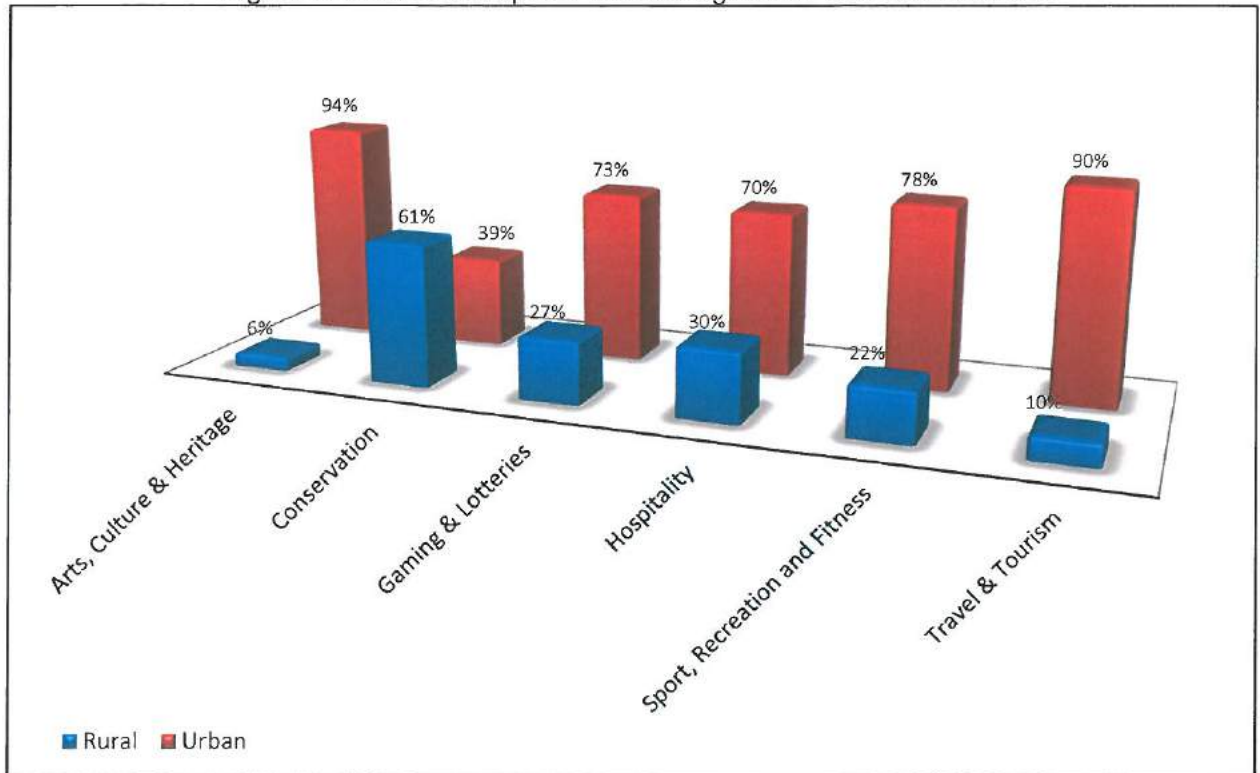


Source: CATHSSETA SMS 2010 - 2014

The growth trend of employees reported in the sector have seen a decline in the 2014 period, particularly in the Hospitality, Arts, Culture and Heritage and Sport, Recreation and Fitness sub-sectors. The sub-sector with the highest decline in the number of employees reported is the Hospitality sub-sector, with a 13.7% decline.

The geographical layout of the entities registered with CATHSSETA has been determined based on their concentration within both urban and rural areas. Figure 6 provides the urban-rural split of entities per sub-sector. As expected, the majority of entities are contained in urban areas within all sub-sectors, with the exception of the Conservation sub-sector. It must be noted that a possible reason for the dominance of employers in urban areas, within specific sub-sectors, like the Arts, Culture and Heritage may be due to the levy-grant system, which tends to focus on levy payers. This therefore, may not be a true reflection of the sub-sector due to the biasedness of the data utilised.

Figure 6: Urban-rural split of entities registered with CATHSSETA



Source: CATHSSETA SMS 2014

## 1.4 Drivers of Change

### National Development Plan

The primary aim of the National development Plan (NDP) is to eliminate poverty and reduce inequality in South Africa by 2030. Increased employment levels through accelerated economic growth, improving the quality of education, skills development and innovation and building of a developmental and transformational state are 3 specific areas of the plan that stand out. The plan presents a long-term strategy to increase employment and broaden opportunities through education, vocational training and work experience, public employment programmes, health and nutrition, public transport and access to information.

In respect of the CATHSSETA sector and the of quality of training delivered, it is pertinent to note that the very nature of the sector constitutes in-house or non-accredited training, as seen in the

Planning and Reporting data submitted to CATHSSETA. This issue is further exacerbated by the absence of professional bodies to ensure quality needs of training. In keeping with the vision of the NDP and to promote the drive of accredited training, supported by the grant regulations, 80% of all Discretionary grants are spent on PIVOTAL programmes. These have been allocated across bursaries to employed as well as unemployed learners pursuing sector related qualifications. In addition to this, CATHSSETA supports Work-integrated learning interventions, Learnerships for both employed and unemployed persons and Skills Programmes to cater for critical skills for the employed.

Transformation within the sector still remains a challenge and is promoted by the utilisation of the NSDS III Developmental and Transformational imperatives being incorporated into the CATHSSETA criteria for allocation of Discretionary grants.

In response to the NDP's vision of the TVET colleges becoming preferred institutions of vocational learning and improvement of education at TVET colleges, CATHSSETA plays a crucial role in building relationships between education institutions and employers. In addition to this action, the capacity of TVET colleges have been uplifted. Review of the Chef qualification, the only trade that falls within the sector is currently being conducted in order to ensure relevance to the National Artisan Moderating Body (NAMB) requirements. CATHSSETA has partnered with UMALUSI, the National Department of Tourism and various industry stakeholders to review the National Certificate Vocational (NCV) for both Hospitality and Tourism. This project critically examined supply issues in the labour market and has yielded significant findings that will allow for these qualifications to be realigned and scoped to industry expectations and ensure TVET College Graduates are readily absorbed by the labour market. The NCV review has produced a research report entitled "At Your Service - Towards an informed understanding of the NC (V) Tourism and Hospitality programmes". This report documents the exact curricular changes required for the NCV qualifications and the review task team has begun with the actually revising of the curriculum.

Coupled with this review is exposure of TVET faculties to industry, as most lecturers are classroom based and have therefore lost touch with how industry operates and conducts its daily operations. CATHSSETA through its MoUs with UMALUSI, the 43 TVET Colleges and the Peermont Global put in place a Professional Endorsement project that provided 177 TVET College Lecturers with workplace exposure to the latest operational procedures at Emperors Palace, which is one of the country's largest resorts, incorporating the operating procedures of a multitude of business aspects such as conferencing, gaming and hospitality. In addition to the workplace exposure these TVET College lecturers were also trained in the latest computer software and packages such as the Galileo global distribution software.

CATHSSETA has further responded to the proposals outlined in the NDP, by ensuring that the Directive on public entities contribution of training budgets has been communicated by way of national workshops, in partnership with the Department of Public Service and Administration. Guidelines have been developed and continuous engagement with relevant public entities are currently underway to ensure participation.

## White Paper on Post School Education and Training

The White paper sets out strategies for an improved post school education and training system that will meet the needs of South Africa by 2030. A sharpened focus of SETAs is proposed, limiting the scope of a SETA to training of employees within the relevant sector and unemployed persons wishing to enter the sector. It is proposed that SETAs will be further employed to provide supply-side data towards the development of a national skills system. The focus of the SETA mandatory grant will be exclusively on gathering accurate data on sector skills needs. SETA discretionary grant funding will be intended for programmes aimed at supporting both existing workers and potential new entrants to the labour market. Providers could be public, private or even the employer's own in-house training institutions, provided they have the capacity to provide all or substantial parts of qualifications.

As it currently stands, the White Paper reinforces the vision of the NDP. In terms of the proposed Technical Vocational Education and Training (TVET) Colleges, CATHSSETA has and is currently instrumental in the review of qualifications offered by the former FET colleges as well as enriching the capacity of TVET college lecturers. As outlined in the White Paper, Figure 7 below provides the list of partnerships that CATHSSETA has with Universities, UoTs and TVET Colleges.

Figure 7: Partnerships



The private providers in the sector are CATHSSETA accredited training providers, private TVET Colleges, Hotel Schools and private training providers. It must be noted that not all of these private providers are accredited by recognised South African quality assurance bodies and many private training providers offer courses and qualifications that are quality assured by international quality assurance bodies. There are 312 training providers that are accredited by CATHSSETA. There are 42 more training providers who have programme approval to offer CATHSSETA qualifications but are accredited by other quality assurance bodies. These providers have programme approval to offer a range of 95 qualifications and 145 skills programmes covering the scope of the sector. The majority of CATHSSETA Accredited Training Providers offer Arts, Culture, Heritage, Hospitality, Conservation and Sport, Recreation & Fitness qualifications. Only a few providers offer Gaming & Lotteries and Travel & Tourism qualifications as these are niche markets with limited demand. The quality of training provided by the private providers is generally of a high standard, including both accredited and non-accredited training offered in the sector. Employers are often not concerned with certification, but are both budget and results driven and therefore often use private providers who provide their employees with the skills required, but who are not accredited. Short industry specific courses fall into this category and are extremely popular amongst stakeholders.<sup>b</sup> . The NSDS III prioritises the use of public providers in skills development, whilst also encouraging the forging of private and public partnerships. This provides an excellent opportunity for private providers to partner with TVET Colleges to both help align their qualifications to industry specifications and provide their lecturers with the necessary workplace experiential component as the private providers have the experience of training provision in the workplace.

### **National Skills Accord**

Since the inception of the National Skills Accord of 2011 and in response to such, CATHSSETA has negotiated partnerships with employers and learning institutions. CATHSSETA strives to ensure that the submission of training plans and reports are subject to consultation with organised labour within a specific organisation. Training Committee workshops are held nationally, with the aim of establishing and empowering Training Committees in the workplace.

### **Employment Tax Incentive Act 2013**

This Act commonly referred to as the Youth Wage Subsidy encourages youth employment and plays a pivotal role in the CATHSSETA sector. As reported in the Mandatory Grant application, over 54% of employees in the sector are youth. Thus, the incentive further encourages employers to continue employing from this age group. The sector, specifically Hospitality and Tourism is characterised by the perception of offering transition employment and thus attracts employees falling within the 18 – 29 age category. In addition to this, the regulation of wages in the sector e.g. the Sectoral Determination, allows employers within the sector to participate and derive benefit from the incentive.

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<sup>b</sup> Feedback from stakeholders from all sub-sectors during various skills planning stakeholder workshops.

## Government Strategy

- **The National Skills Development Strategy (NSDS) III** for 2011 to 2016 follows the integration of higher and further education and skills development into a single Department of Higher Education and Training. The strategy promotes partnerships between employers, public education institutions (TVET colleges, universities, universities of technology), private training providers and SETAs. Priority is given to strengthening the relationship between public colleges and universities and the SETAs, as well as with employers.<sup>2</sup> NSDS III ensures increased access to training and skills development opportunities and achieve the fundamental transformation of inequities linked to class, race, gender, age and disability in our society. It attempts to address the challenges of skills shortages and mismatches in the country and improve productivity in the economy. The strategy consists of 8 goals, 16 outcomes and 38 outputs to be achieved mainly by SETAs in collaboration with the DHET, FET Colleges, Universities and the National Skills Fund (NSF).<sup>3</sup>
- **The Sector Education and Training Authorities (SETAs) Grant Regulations:** The impact of the 20% decrease in Mandatory grants was not seen in the 2013 submission of the Mandatory grant applications. However, the table below provides comparative figures for the 2013 and 2014 periods which show a decline in submissions.

Table 2: 2013 and 2014 Mandatory grant applications received

Year	Total submissions
2013	1336
2014	1111

CATHSSETA SMS: 2013-2014

The current Grant regulations do not require SETAs to have a policy on Mandatory Grants (MG), despite this, CATHSSETA have developed its Mandatory Grant policy guided by these Regulations in order to regulate the system. The Discretionary Grants (DG) policy and framework provides clear requirements on the allocation and distribution of these grants. Thus, the impact of the grant regulations translated into the following; the DG window is now aligned to close at the same time as the MG (i.e. 30 April), the DG policy makes provision for the inclusion of Strategic projects and increased transparency in the working of the SETA.

Previous records indicate that approximately 80% of monies have been spent on PIVOTAL training and thus the transition from old practices to compliance with the Grant regulations has not been difficult.

The small size of the levy income and the nature of the CATHSSETA sector (being predominantly event driven) are limitations to the SETA. The decrease from 50% to 20% of the MG filters down to impact on resources available for research and this component falls under the non-PIVOTAL budget. CATHSSETA mitigates this shortcoming by establishing a national research network with Higher Education Institutions (HEIs) and through the funding of learners at post graduate levels to research sector specific topics. Thus, linking PIVOTAL outcomes to increased research capacity within the sector.

The reduction of the MG to 20% was initially negatively perceived by the industry, CATHSSETA through its workshops have communicated the reallocation of the skills levies

to increased monies available to the sector through the DGs and have thus seen an increase in the number of applications for DGs. Analysis of the DG applications received is outlined in the demand chapters for each sub-sector.

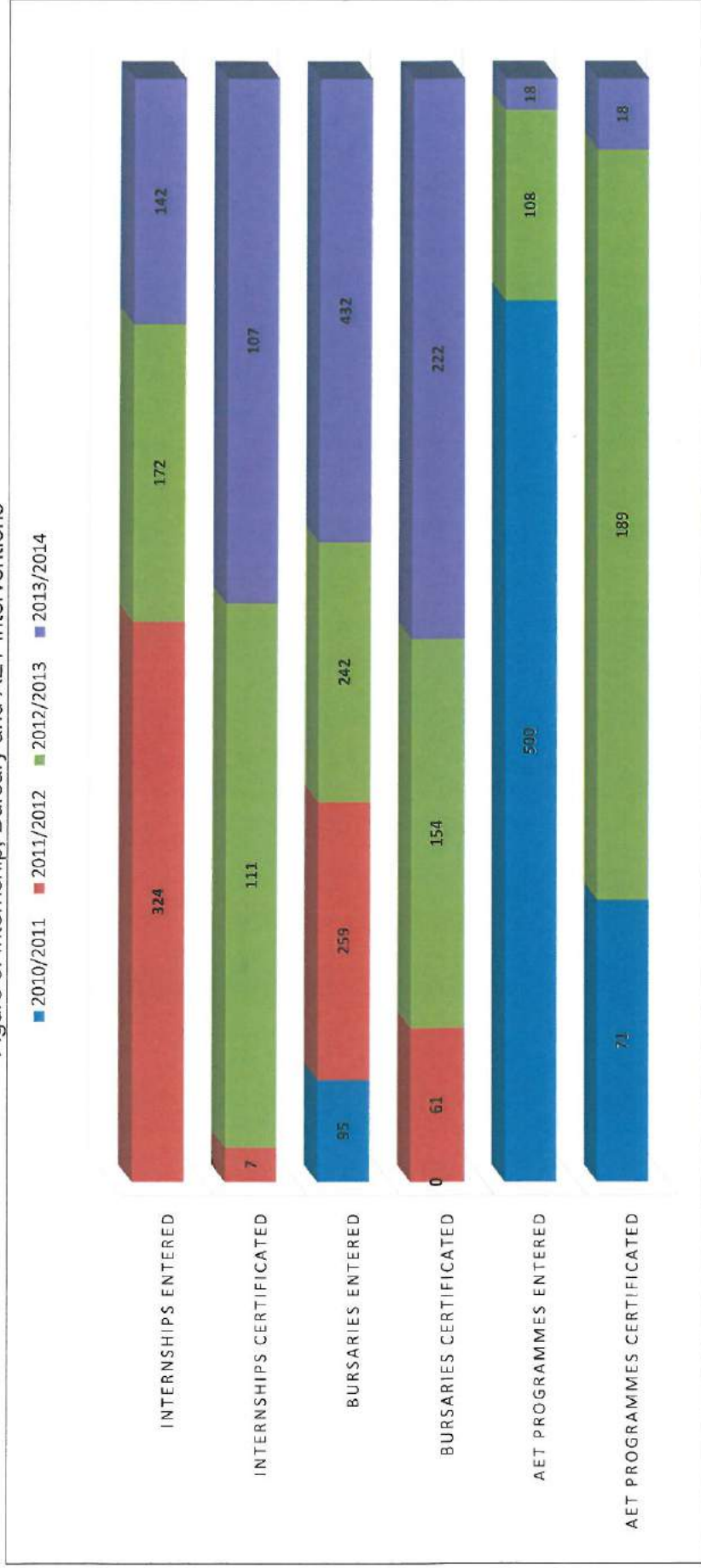
- **The Strategic Integrated Projects (SIPs):** CATHSSETAs approach to SIPs funding has been integrated in the DG framework. The scarce skills required for the delivery of the SIPs have been presented by the DHET and CATHSSETA has identified the following four scarce skills which will be addressed by supporting a total of 60 persons through Work Integrated Learning programmes:
  - Environmental Manager;
  - Programme or Project Administrators Assistant;
  - Truck Driver and
  - Handypersons.

Though the Truck driver occupation does not fall directly within the scope of the CATHSSETA sector, it has been identified as a scarce skill. CATHSSETA thus has identified the need to explore relevant partnerships with Transport SETA in order to put in place relevant programmes to address this scarce skill together.

## 1.5 Analysis of CATHSSETA programmes

Past programmes implemented by CATHSSETA, analysed based on achievements reported in the Quarterly Monitoring Report (QMR) have been assessed for the past four years to ascertain their impact in terms of delivery approaches to both employed and unemployed people. The results presented in the figure 8 present the number of learners that have entered and that have been certificated on internships, bursaries and Adult Education and Training (AET) programmes.

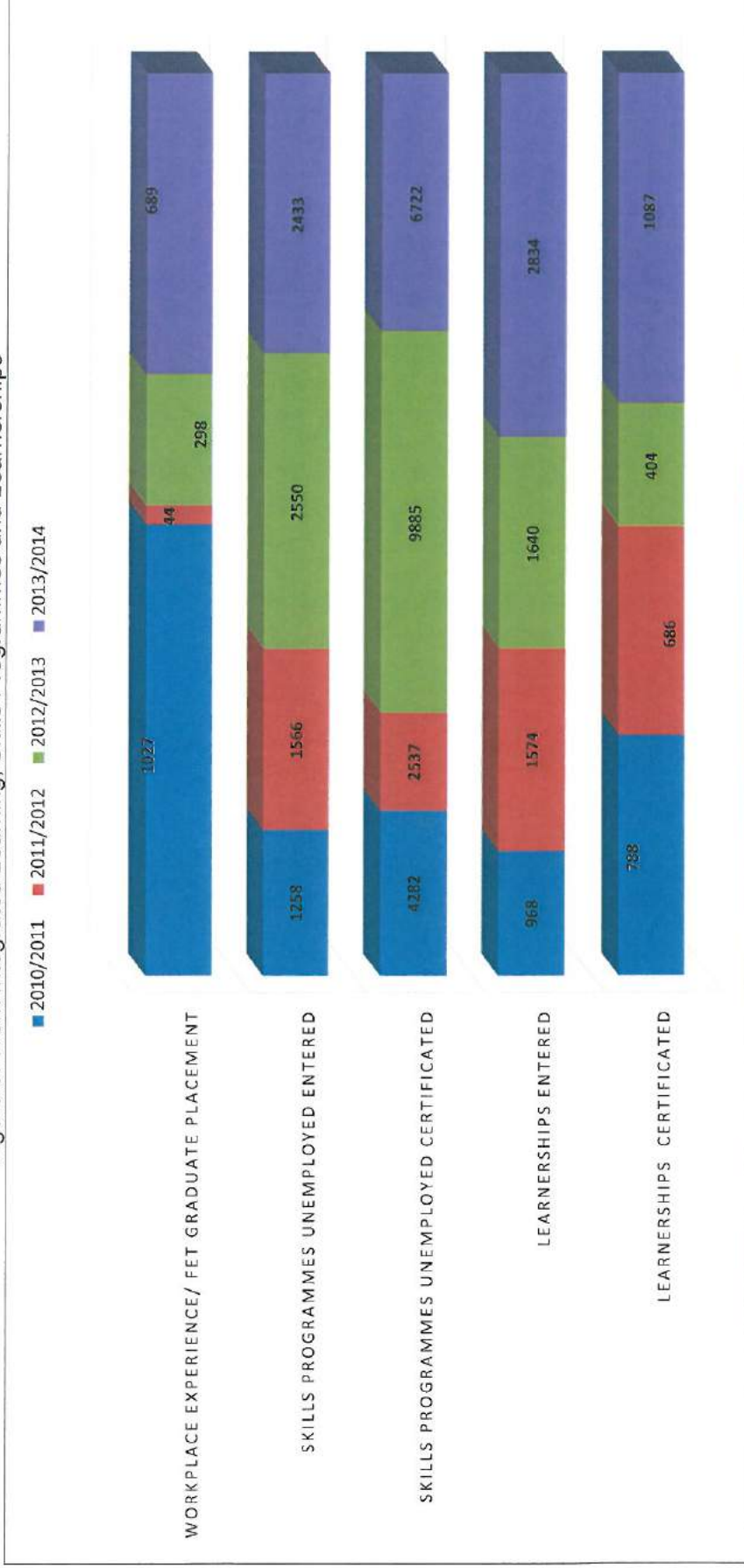
Figure 8: Internship, Bursary and AET interventions



CATHSSETA QMR: 2010/2011-2013/2014

The results presented in the figure 9 present the number of learners that have entered and that have been certificated on Work Integrated Learning, Skills Programmes and Learnerships.

Figure 9: Work Integrated Learning, Skills Programmes and Learnerships



CATHSSETA QMR: 2010/2011-2013/2014

CATHSSETA has prioritised the need to conduct impact assessment on all projects and is in the process of appointing research partners per sub-sector to develop an appropriate tool and conduct an assessment of the outcomes and impact of CATHSSETA learning interventions. These include:

- Determining the extent to which the project achieved the set aims, objectives and targets
- Establishing reasons for deviation
- Identifying and quantifying the direct as well as indirect benefits
- Determining the overall impact of the programme on the beneficiary, employer and provider

## **1.6 HIV and AIDS**

In line with its organisational objectives, CATHSSETA has identified and is fully conscious of the impact of the HIV/AIDS pandemic has on the CATHSSETA sector. By ensuring that a component of all training programmes imparted contains an element of HIV/AIDS education, CATHSSETA aims to address the challenge posed by this pandemic and to further negate both the social and economic impact within the working environment across the sector. The ultimate objective is to address the impact of HIV and AIDS on skills development and productivity within the country.

## **1.7 Arts, Culture and Heritage sub-sector**

The fragmented manner in which the Creative Industries have been divided amongst the SETAs is problematic, in that it hampers the effective delivery of skills development initiatives as the full value chain of the Creative Industries cannot be leveraged upon. The Arts, Culture and Heritage SIC codes that have been placed in CATHSSETA's scope result in CATHSSETA developing the actors, artists and crafters who are effectively either employed or sell their products with employers or retailers who now fall under other economic sectors and their respective SETAs. Furthermore, the fragmented distribution of the Creative Industries SIC codes has resulted in the already limited skills development levy pool being split and paid to various SETAs, which further inhibits the realisation of the full potential of the Creative Industries value chain. CATHSSETA is researching and updating the South African Creative Industry Value Chain and based on the outcomes of this, will formulate a proposal for the realignment of the SIC codes of the Creative Industries to allow the full potential of this sector to be realised. This proposal will be developed in conjunction with the Department of Arts and Culture (DAC), Department of Trade and Industry (dti), SETAs with Creative Industry SIC codes in their scope and stakeholders from the sector. The final proposal will be submitted to DHET for consideration and implementation.

### **1.7.1 Economic Contribution**

The South African visual arts sector was estimated to contribute over R1 billion in added value to the national economy (R791 million of this in direct gross value-added). The value of the market for the visual arts in South Africa is estimated at R1 billion per annum. Turnover for sale of artworks is valued at just over R1 billion per annum, excluding the value of auction sales where 83% of this revenue is generated from sales through galleries, and 17% from sales from artist studios and the direct commissioning of work from artists<sup>4</sup>. According to IPAP 2012/13-2014/15, the South African craft sector contributes about R3.32 billion annually to the GDP (0.14%) and it provides income and employment to approximately 273 495 people through the economic activity of about 31 802 micro and small enterprises operating across the value chain<sup>5</sup>. South Africa contributes slightly less than 1% of the global trade in crafts, said to be \$35billion. The 2008 Gauteng Creative Mapping Project indicates that the performing arts sector turnover was estimated at R260million and gross value add of R166million, with direct employment of 2 200 people. The activities included in the study are dance, orchestra, music, opera, musical theatre, theatre, comedy, circus performance, magic shows, poetry and storytelling. The recording industry in South Africa was worth R1.7billion and ranked 17th in the world. A 2010 study of Robben Island found that in 2008/9 the direct income of the heritage sites amounted to R176million with direct employment of about 716 people.

### **1.7.2 Employee Profile**

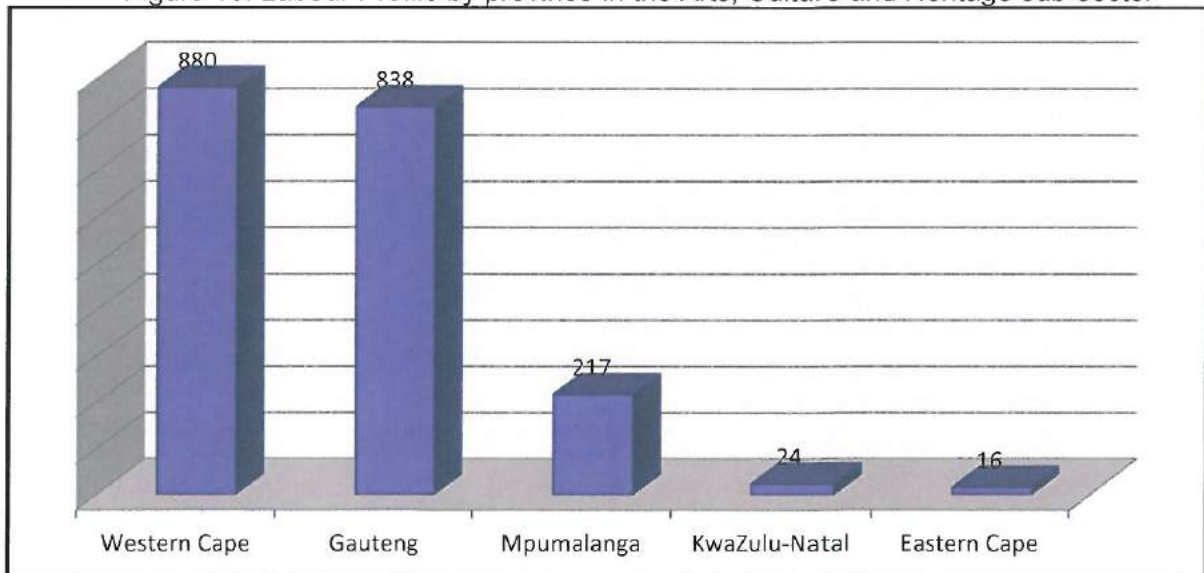
The Arts, Culture and Heritage sub-sector has variable characteristics which often presents difficulties with the measurement of the labour force within this sub-sector. A total of 1975 employees have been reported through the Mandatory Grant application process for 2014. This is a significant decrease in the number of employees reported on, with an approximate decline of 70% as compared to the number of 3351 employees reported in 2013. This number reported through the Mandatory Grant application process is not fully reflective of the labour profile of the sub-sector and the low number reported for the 2014 period may be attributed to the reduced number of Mandatory Grant applications received for the period. A total number of 3351 employees were reported in the 2013 period, initiating a decreasing trend in reporting. However, this is not entirely due to a decrease of employees in the sector but is indicative of the nature of employment in this sector which is often on

a part time or contractual basis which causes fluctuations in the number of employees reported. Furthermore, many organisations were erroneously transferred to MICTSETA, FPMSETA and CATHSSETA during the transfer of SIC codes when MAPPSETA was dissolved and these organisations have now moved between the three SETAs through the change in SETA jurisdiction process administered by DHET, which may accounts for the decrease in the number of employees reported in this sub-sector.

The age profile of the 1975 reported employees indicates that the majority, 53% of employees fall within the under 35 years age bracket, with 43% in the 35-55 years range and 4% within the over 55 range. The racial profile of the sub-sector based on the employees reported by the CATHSSETA registered enterprises shows that majority of employees in the sub-sector are White encompassing 40% , with the lowest proportion of employees being Indian at 3%. Disabled persons in the sub-sector only make up 0.1%.

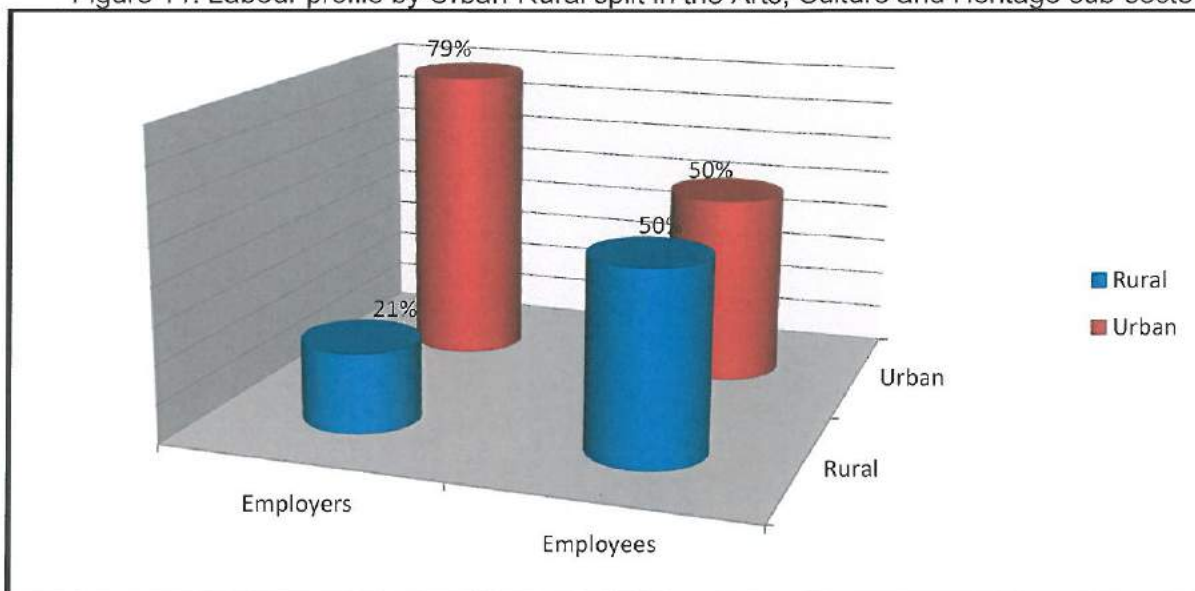
Figures 10 and 11 indicates the labour profile of the Arts, Culture and Heritage sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. Approximately 87% of employees are employed in the Western Cape and Gauteng province alone, with the lowest amount of employees seen in the Eastern Cape. There are no employees that have been reported in this sub-sector in the Limpopo, Free State, North West and Northern Cape provinces from the Mandatory grant data submitted to CATHSSETA. Despite the dominance of employers within rural areas in this sub-sector, an equal spread of employees is seen between rural and urban areas as per figure 11.

Figure 10: Labour Profile by province in the Arts, Culture and Heritage sub-sector



Source: CATHSSETA SMS 2014

Figure 11: Labour profile by Urban-Rural split in the Arts, Culture and Heritage sub-sector



Source: CATHSSETA SMS 2014

### 1.7.3 Drivers of change

- **Industrial Policy Action Plan 2010-2014 (IPAP)**

The plan takes stock of the progress made and challenges experienced since the commencement of IPAP in 2008. The plan further identifies opportunities and constraints in different sectors and sets out key action plans for each identified sector. The sectors identified in IPAP relevant to the creative and cultural industries are craft and music sectors

- The plan creates an opportunity for CATHSSETA to work with all role players in identifying relevant training interventions and qualifications to address the needs of craft enterprises and craft entrepreneurs' particularly in rural areas for stimulation of innovation and design skills which will assist with market access.
- These interventions will allow the craft sector to reach its full potential by addressing market access challenges facing the sector. Further support for crafter in the following areas: product design and innovation, pricing, quality assurance and market access in a form of Learnerships, skills programmes, bursaries and continuous research.
- Skills development initiatives in areas of Intellectual property protection, technical, recording and performing skills are urgently required. CATHSSETA's list of scarce and critical skills has already identified some of the necessary skills such training for sound technicians, singers and instrumentalists and there are various programmes that are currently being rolled out in this respect. More work and programme of action needs to be put in place to address this challenge.

- **DAC Strategy 2012/2013 (Mzansi Golden Economy)**

The strategy reinforces the Arts, Culture and Heritage sector as an economic growth sector. It further emphasises the need for skills development initiatives for excellence and high performance in the sector. The strategy also sets large scale interventions aimed at optimising growth and employment potential of the sector including creation of new business opportunities to match the demand.

- Capacity building is one of the key outputs for the Mzansi Golden Economy (MGE)'s Cultural Events Work-stream. DAC and CATHSSETA have identified a need for provision of a coordinated skills development and training initiatives as part of up-skilling local arts organisations in hosting events and training in development of quality products and services for tourism consumption. The continuous process of creation, production, dissemination, exhibition and consumption of the cultural and creative industries requires education and skills development in each stage of the cycle and in all stages of the education system.
- Production of goods and services also requires a continuous process of creativity by practitioners as well as the development of associated skills to enable the process of production.
- The heritage sector requires the development of skills for the conservation and protection of our heritage estate and assets as well as the skills for management of cultural heritage tourism.

- **Draft Revised White paper on Arts, Culture and Heritage**

The draft White Paper provides the cultural and creative industries with a policy framework that takes into account the road travelled current status quo and challenges faced. It also gives the context and approach of current imperatives of both government and the sector itself. All of these efforts are in response to the outcome based approach and alignment to the government's twelve national outcomes.

- Cooperation, collaboration and integrated planning and implementation between all role players including SETAs within the cultural and creative industries will lead to the establishment of a skilled and capable workforce to support an inclusive growth including growth of labour intensive sectors.

- **A National strategy for developing an inclusive and a cohesive South African society**

This strategy aims to develop and preserve South African culture and to ensure social cohesion and nation building. The strategy takes into consideration the diverse cultures, languages and heritage of the people of South Africa.

- Human resource management and development in the arts, culture and heritage sector coupled with decent work and sustainable livelihoods. Key in this regard is the role of education and skills development as a systematic approach towards transformation.
- The 7 key transformational and developmental imperatives provides a base for the elimination of the existing inequalities.

- **Department of Arts Culture Heritage Human Resource Strategy**

The strategy aims to develop a highly skilled and competitive workforce capable of contributing to socio-economic change through heritage management and development in South Africa.

- Training and Development - More training is required in specialized fields such as collections management, heritage management, and taxidermy and object conservation. CATHSSETA Liaising with relevant role players such as Iziko museums, South African Museums Association and the National Heritage Council amongst other related institutions responsible for indigenous knowledge, culture and heritage issues in establishing mechanisms to ensure a coherent approach to research and skills development is key for the development of the sector.

- **DTI – Integrated Strategy on the promotion of Entrepreneurship and Small Enterprises**

The promotion of entrepreneurship and small business remains an important priority of the government of South Africa. The acknowledges the need for focused support to designated target groups and priority geographical areas and sectors as well as support for fostering enterprise organisation forms such as co-operatives and the inculcation of special institutions arrangements.

- SETAs need to roll out more programmes on small business skills-development programmes such New Venture Creation, with the aim of enabling the participating learners to learn the skills and receive the support necessary to start and successfully manage their own businesses.

- **DTI- Craft Sector Development Strategy**

The CSD focuses on various strategies aimed at supporting the growth and development of craft manufacturing enterprises that have chosen a growth and development path that includes batch manufacturing and wholesale trade. The strategy further developed for increasing competitiveness, exports and investments as well as employment and equity, in the priority sectors of South Africa. Each key focus area demands government and stakeholders to jointly seek the action initiatives that must be implemented to exploit opportunities and deal with challenges facing the priority sectors.

- The strategy is the basis to forge constructive engagement with stakeholders and partnerships based on best practice that must be effective at the national, provincial and sectorial levels.

## **1.8 Conservation sub-sector**

### **1.8.1 Economic Contribution**

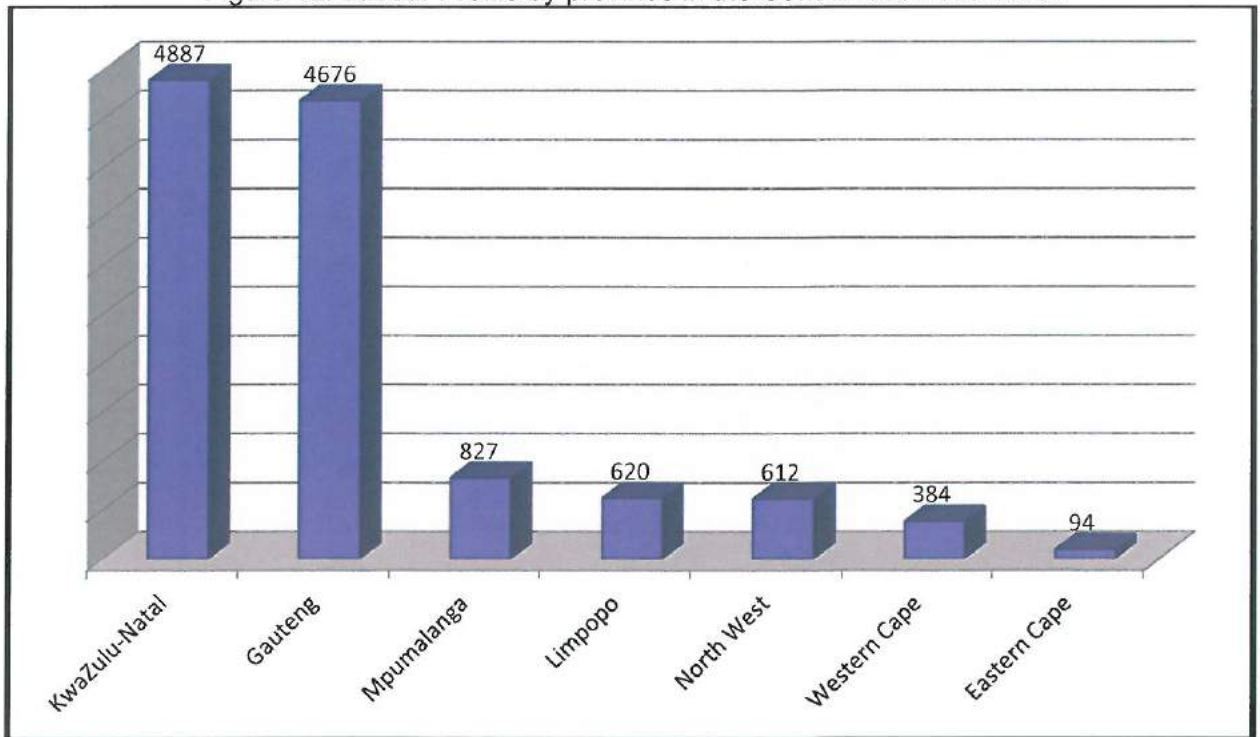
Determining the economic contribution of the conservation sector is problematic as there is a lack of official statistics and where these do exist there is no differentiation between the environmental sector and its conservation component. "However, based on a 2006 report to NEDLAC – the last available data – the environmental goods and services sector (more commonly referred to as "green industries" in government policy) was valued at between ZAR 14.5 billion and ZAR 23.2 billion in 2004, i.e. from 1.0-1.6% of GDP."<sup>6</sup> This lack of accurate official statistics regarding the economic contribution of the environmental and conservation sectors, is exacerbated by the fact from a green economy perspective, South Africa does not report green jobs individually in any of its official surveys or statistics. Therefore, accurate figures regarding the number of people employed and size and growth of this sector are unavailable.<sup>7</sup> CATHSSETA has identified this lack of information regarding the economic contribution of the conservation sector as a research priority that it will address through its research partnerships with the Environmental Learning and Research Centre at Rhodes University and GreenMatter.

### **1.8.2 Employee Profile**

The Conservation sub-sector reporting of employees from the Mandatory grant data has seen an increasing trend from 2012. In 2013, a total of 11422 employees were reported on and this figure has increased to 12100 for the 2014 period, resulting in a 6% increase. This increase can be directly attributed to the increase in "green" jobs in the sector, particularly in natural resource management and is reflective of the potential to create jobs in this sub-sector. This sub-sector employs a relatively low number of employees as a certain amount of staff in the sector are volunteers. This is further compounded by the fact that numerous employees in the sector are employed by provincial and local governments and are therefore reported as government employees to Public Sector Education and Training Authority (PSETA) and Local Government Sector Education and Training Authority (LGSETA), this practice significantly distorts the number of employees reported in this sub-sector.

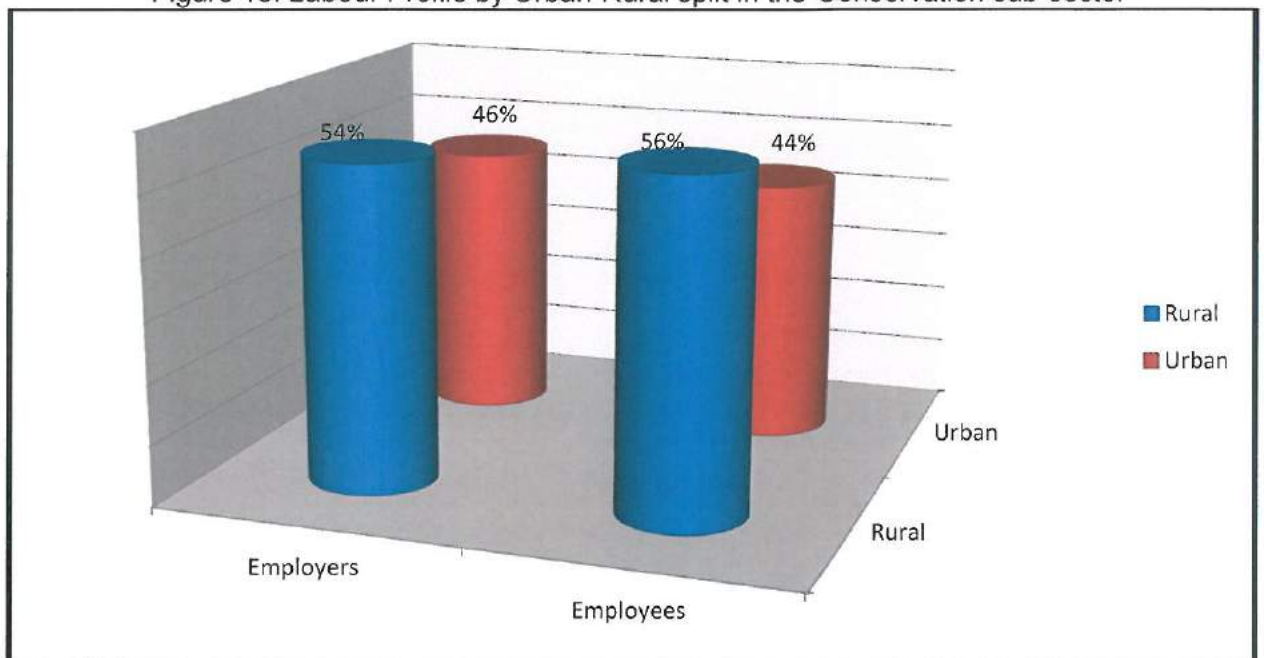
The sub-sector is dominated with 59% of its employees falling within the age category of 35-55 years and the smallest percent of 9% found in the over 55 years age category. The racial analysis of this sub-sector yields that there are 10211 African employees, 1004 White employees, 798 Coloured employees and 87 Indian employees. The sub-sector employs only 23 disabled employees, which is an almost 92% increase in numbers reported as compared to the 2013 period.

Figure 12: Labour Profile by province in the Conservation sub-sector



Source: CATHSSETA SMS 2014

Figure 13: Labour Profile by Urban-Rural split in the Conservation sub-sector



Source: CATHSSETA SMS 2014

Figures 12 and 13 indicate the labour profile of the Conservation sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. Approximately 40% of employees are employed in the KwaZulu-Natal province followed by 38% in Gauteng and 7% in Mpumalanga. This sub-sector is dominated with employment in rural areas, where 56% of the labour profile is engaged in employment in an area under rural classification.

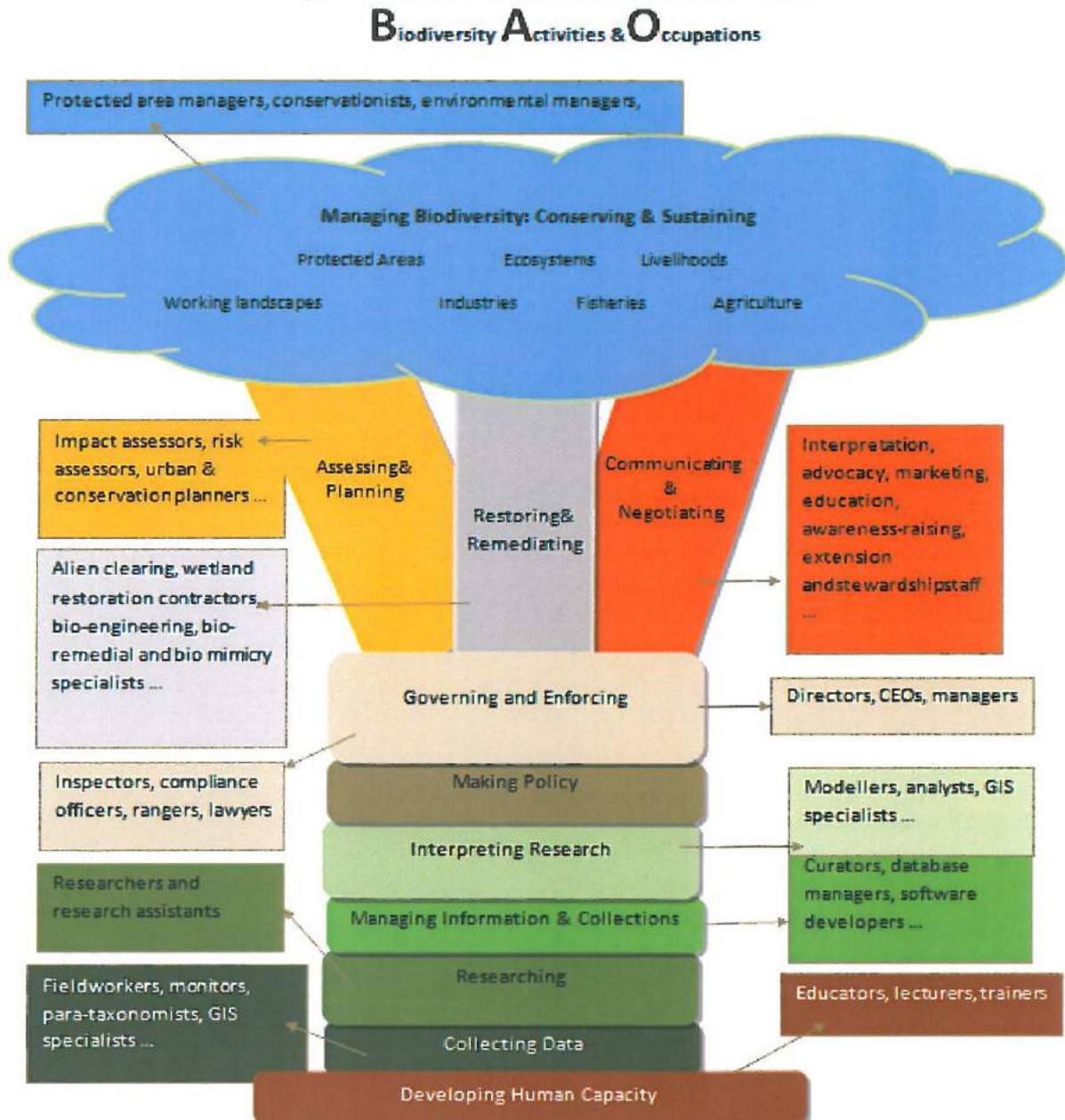
### 1.8.3 Drivers of Change

- **The National Green Economy Accord of 2011**
  - The aim is to form a partnership between DEA, Communities, Organised Business and Labour and is part of an ambitious plan to shift South Africa's economy to a lower carbon-intensity whilst increasing jobs and industrial development.
  - The accord has 12 commitments ranging from the installation of solar water heating systems to increased investment in green industrial activities as well as the promotion of green skills at a technical level.
  - The following commitments in particular, directly address CATHSSETA's mandate and its sector:
  - Government to expand training programmes linked to the skills needs of the green economy, including through the efforts of Further Education and Training colleges and Sector Education and Training Authority. Government will convene a meeting of stakeholders to quantify the skills required over the next five years in the sector and work with colleges, universities and training institutions in the private sector to provide the required training programmes.
  - All parties to bring small enterprises and social enterprises into the green economy. The green economy offers opportunities for Broad-based black economic empowerment and addressing the needs of women and youth entrepreneurs. Often such enterprises are unable to access available funding because information is not available to them or application processes are cumbersome. The parties agree to support green funding road shows to increase public awareness of the opportunities that exists and the funding that is available.
  
- **The Human Capital Development Strategy** for the Environmental Sector from the Department of Environmental Affairs has also identified five main drivers that influence skills development in the environmental sector namely:
  - Macro ecological drivers linked to environmental legislation. In order to implement legislation skills such as risk assessment and management skills, various type of environmental science are required.
  - Macro-economic drivers and the emergence of a green economy which includes the green economy which includes efforts to formalise the Environmental Goods and Services sector, which according to DEA, makes up approximately 7% of GDP. This driver is creating a demand for new skills in environmental economy, green technology, SMME and sustainable development skills
  
- **Outcome 10 of Government's National Outcomes** focuses on the environment and two of the critical problems in the delivery agreement: (a) Proper and better management of our environment and (b) Protection of our biodiversity are linked to CATHSSETA's conservation chamber activities.
  - The outputs of these two critical problems (a) Sustainable environment and (b) Protected biodiversity places emphasis on management of environmental impacts from mining and related activities, expansion of the conservation estate, reduced

climate change impacts on biodiversity, protected ecosystems & species and valuing of ecosystem services.

- In order to implement this outcome, Government has identified coordinating department, core departments and public entities such as DEA, Provincial Environment Departments, and Conservation Agencies.
- These outputs call for development of human capacity as indicated in Figure 9 below in the national and provincial governments as well as conservation agencies.

Figure 14: Biodiversity Activities and Occupations



- **DEA Strategy<sup>8</sup>** places significant emphasis on CATHSSETA, as it is tasked with skills development for conservation bodies and agencies such as the SANBI, SANParks, semi-independent provincial agencies and local government including the Department of Environmental Affairs and provincial departments. These agencies are mandated by the state to conserve biodiversity (wildlife, indigenous plants and ecosystems including those feeding water resources and commercial marine systems) in protected areas and on private land, in terrestrial, freshwater, coastal and marine ecosystems.
- Just less than 50% of biodiversity staff is employed by the state; the remainder is employed in private agencies and in NPOs. All of them operate in a new conservation paradigm in which the protection of biodiversity and development planning must be integrated, yet few have been trained in this new paradigm.
- Other aspects of new approaches include adoption of an ecosystem services approach, an international trend which the South African government is also supporting. These new paradigms are however, slow to make their way into the training systems and there is an urgent need for curriculum innovation and re-skilling of conservation educators and trainers. Conservation agencies are under-staffed; have high levels of vacancies particularly among managers and technicians; with skills levels dropping in recent years; and many agencies, particularly at provincial level, struggling to meet their mandate.
- There are significant new development opportunities associated with green growth and sustainability. Issues such as climate change, energy shortages, natural resource degradation and high energy prices are driving the emergence of a sustainable development paradigm, and in an African context, sustainable development must be tied to poverty alleviation, job creation and new development opportunities, while also ensuring that resources are not over-exploited in ways that undermine future development options and choices.
- South Africa has a good track record of using its protected areas and natural resources for tourism. This important component of the national economy is particularly valuable for creating employment and enterprise opportunities in rural areas, with positive potential for extension, but sufficient management capacity for protected areas is low and requires stepped up skills development. The green economy has made it vital that skills are developed for protected areas and biodiversity management.
- **National Development Plan (NDP)– Vision For 2030**
  - One of the key points of the NDP is the importance to invest in skills, technology and institutional capacity to support the development of a sustainable society and the transition to a low carbon economy, and a focused institutionalised capacity building and management structures are needs.
  - The NDP envisages that by 2020, medium-term adaptation strategies should be piloted and implemented that include encouraging investments in the adaptation technologies and research into the conservation and rehabilitation of ecosystems and biodiversity assets. By 2030 it is envisaged that an investment in low-carbon and climate-resilient infrastructure would have enabled South Africa to export and profit from its technologies and skills and also benefit sectors that deliver enhanced energy,

food and water security, new high-quality job opportunities, and improved quality of life.

- In order to address the key issues affecting the environment in the NDP, CATHSSETA will need form partnerships with The Department of Environmental Affairs, Provincial Departments and other conservation agencies to ensure that employees in the public sector are capacitated to reach the 2020 vision of the NDP. This need to give attention to skills development needs of the public environmental sector at all levels is highlighted in the Human Capital Development Strategy for the Environmental sector. Furthermore, skills development initiatives aligned to the 2030 vision for the employed and unemployed should be delivered.

- **The National Protected Area Expansion Strategy for SA 2008**

This is one of the key drivers of protected area management and will have significant implications for associated skills over the next five years. Key approaches to implementing this strategy include:

- Expansion of existing protected areas (PAs) and integration of its management into current skills structure.
- New PAs are considered a highly optimistic option for implementing the strategy, due to the limitations of the necessary skills and associated budgets for establishing new PAs. WWF-SA however is working in collaboration with provincial conservation agencies, DEA and SANParks to establish at least one more Grasslands PA over the next five years. It is highly unlikely that the establishment of another / 2<sup>nd</sup> PA will come to fruition within the next five years.
- The key emerging strategy is Stewardship to bring the targeted biodiversity 'hot spots', ecological corridors and water factories, etc., under protection. Relevant staff implications are Stewardship Officers, Conservation Scientists, Life Sciences Technicians, and Rangers.

- **The National Climate Change Adaptation Strategy**

- The National Climate Change Response White Paper (RSA 2011) states that the government must do the following with regards to climate change and education and training:
- Ensure that a holistic understanding of climate change and related issues (specifically the required response to climate change) is included in all relevant aspects of formal education curricula. This will prepare future generations for a rapidly changing planet and the transition to a lower-carbon society and economy.
- Include climate change elements in the review of the National Skills Development Strategy and ensure that all SETAs add climate change to priority skills development programmes in the formal, informal and non-formal sectors of the education and training system. This will be accompanied by requisite resource reallocation.
- Establish incentives for research and training such as bursaries to encourage students and scholars to research and study climate change.
- Ensure that the building of knowledge and expertise in new and emerging economic sectors is considered in all tertiary education curricula and relevant formal and informal training.

- Establish a robust research agenda that, amongst others, focuses on quantitative research on the labour requirements for the green transition as well as on other societal adaptation strategies and needs.
- Encourage tertiary and research institutions to develop national monitoring, reporting and verification guidelines for a climate-resilient South Africa. These guidelines would focus on mitigation and adaptation actions such as land-use practices and change. SANParks notes that the skills required for conservation in the face of climate change include adaptive management: “Ensure an understanding of, and practical ability in, dealing with change under circumstances of uncertainty and increased variability, through the principles of adaptive management”.

## 1.9 Gaming and Lotteries sub-sector

### 1.9.1 Economic Contribution

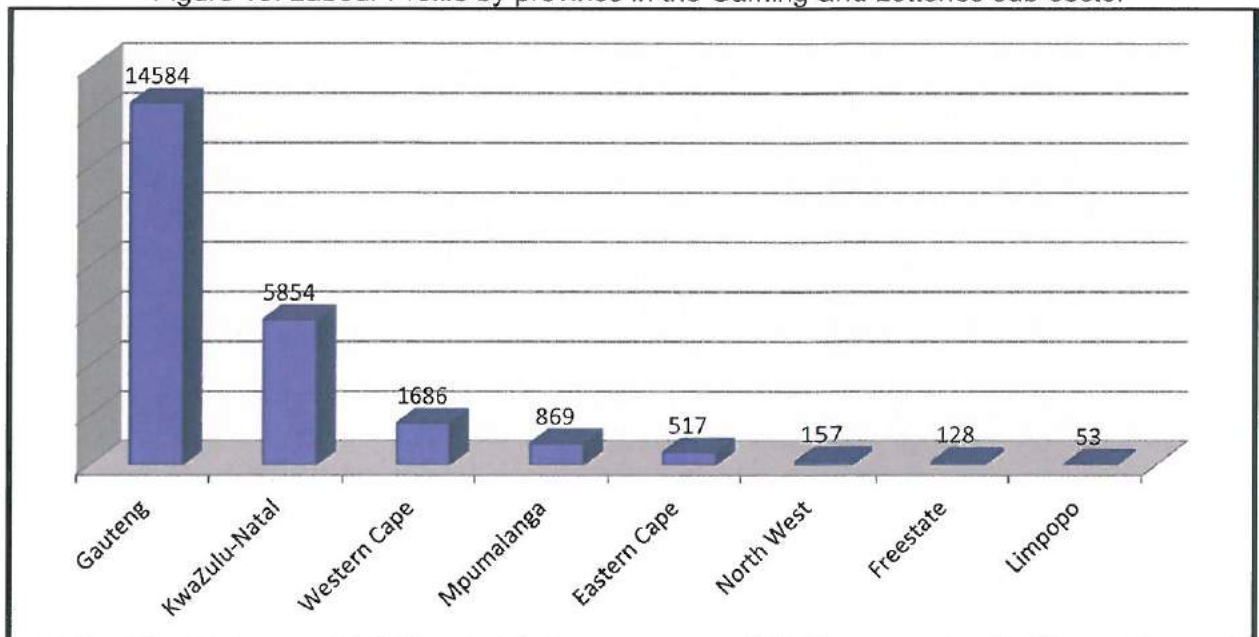
The gross gambling revenue in the 2011/12 fiscal year amounted to R18.4 billion, of which the Casino sub-sector accounted for 81%, which was an increase over the R17.14 billion recorded in 2010/11. This sub-sector employed a total of 34 019 employees in 2012, generated R5 billion in taxes and contributed R83 million to communities through CSI projects.<sup>9</sup> The Horseracing sub-sector in 2009, directly contributed R 2.71 billion to GDP, created 15 685 direct and indirect jobs and generated R 694 million in taxes. Cumulatively the horse racing sub-sector, from 2002 to 2009, directly contributed R 16.8 billion to GDP and generated R 4.3 billion in taxes.<sup>10</sup>

### 1.9.2 Employee Profile

The Gaming & Lotteries sub-sector is the second largest employer with 23848 employees. Gaming & Lotteries is a 24-hour, 7-day-a-week business operation that requires large numbers of employees due to both the shift nature of the work and the strict legislative requirements. Employment reported in this sub-sector is gradually recovering from its decline of 4.7% in 2012 as indicated by the growth of 3.3% in 2013 and 9.7% in 2014.

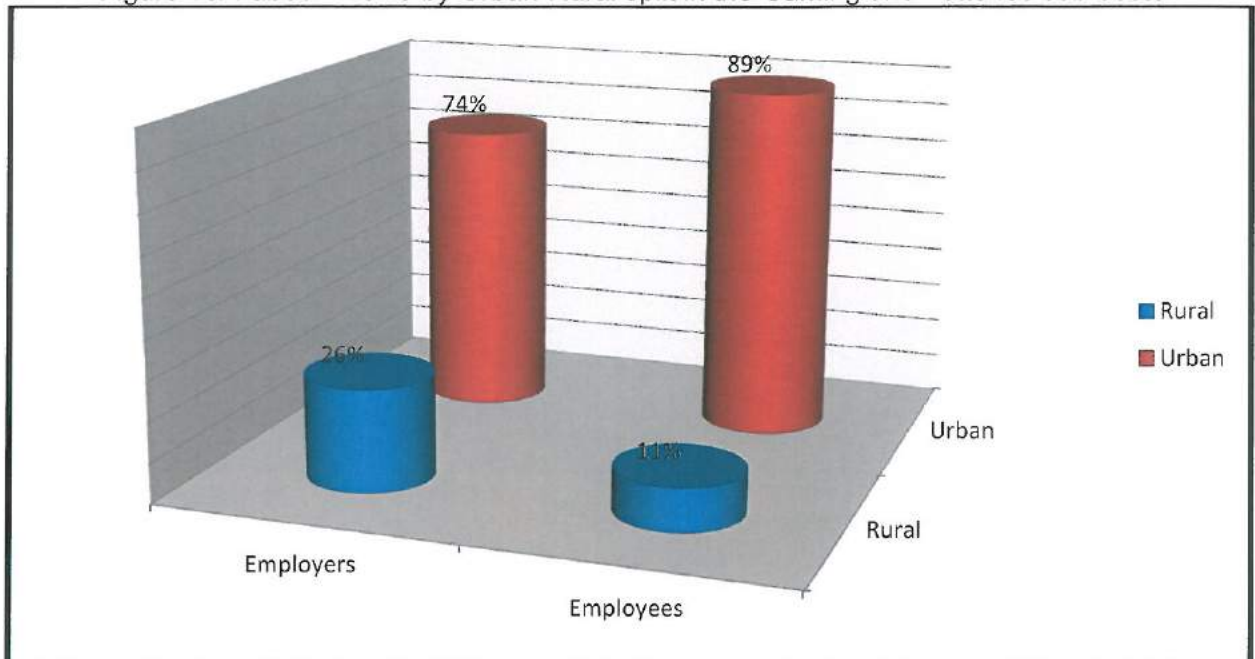
Analysis of the age profile of the CATHSSETA registered entities in the Gaming and Lotteries sub-sector submitting Mandatory grant data, shows that 96% of the workforce falls within the under 35 years age category and the 35-55 years age category. Only 4% of employees are within the over 55 year's age category. This sub-sector comprises 17226 African employees, 2456 White employees, 2631 Coloured employees and 1535 Indian employees. The proportion of disabled persons employed in the sub-sector, remains at approximately 1%.

Figure 15: Labour Profile by province in the Gaming and Lotteries sub-sector



Source: CATHSSETA SMS 2014

Figure 16: Labour Profile by Urban-Rural split in the Gaming and Lotteries sub-sector



Source: CATHSSETA SMS 2014

Figure 15 and 16 indicates the labour profile of the Gaming and Lotteries sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. The provinces of Gauteng and KwaZulu-Natal make up the majority of over 86% of employment in the sub-sector. In the sub-sector, 26% of employers are in rural areas, with 74% falling within urban areas. Employees are predominantly based in urban areas, with only 11% reported to be in rural areas.

### 1.9.3 Drivers of Change

- The Lotteries Act, No 57 of 1997**, which gave birth to the National Lotteries Board and how it needs to conduct its regulatory, enforcement and funding functions. However, in the next twelve months, the lotteries landscape may change. The Lotteries Act, 1997 may be replaced by the Lotteries Amendment Act, No. 32 of 2013. Parliament has already endorsed the bill. The new Act, if signed into law by the President will provide for the establishment of a National Lotteries Commission designed to expand the powers of the board and create a mechanism of licensing organ of the state to conduct the National Lottery and more importantly eliminate the overlapping of functions between the Minister and the board. This one change will have a massive impact on the sector, the DTI, NLB and other agencies have started assembling processes to respond to these changes.

## **1.10 Hospitality sub-sector**

### **1.10.1 Economic Contribution**

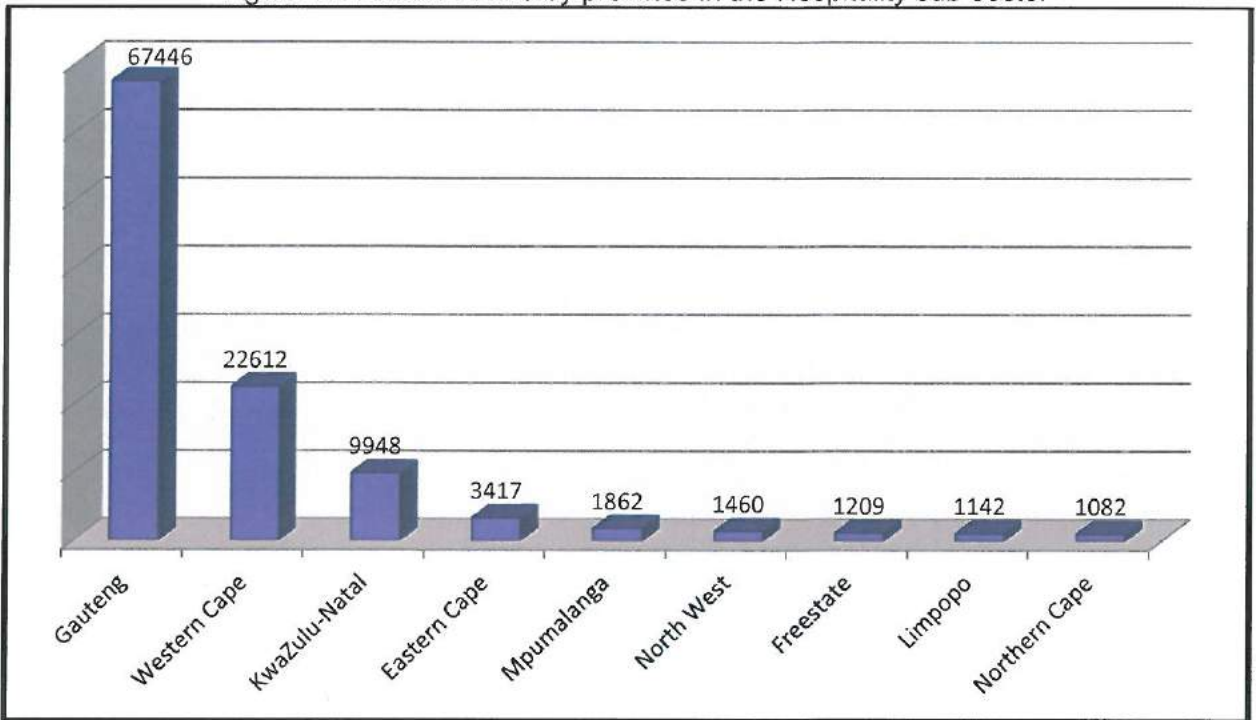
The total room revenue generated by this sub-sector during the 2012 year was R15.1 billion with an expected increase of 11% in 2013 to R16.8 billion. It is projected that by the year 2017 the overall occupancy rate will increase to 55.6% with total room revenue expected to reach R23.5 billion in 2017, a 9.2% compound annual increase from 2012.<sup>11</sup> The accommodation subsector, continues to experience solid recovery, working back the oversupply of hotel rooms following the World Cup. Last year, Sun International reported a comparative increase of 11% in accommodation revenue over the 2012 financial year, on the back of much healthier occupancy and achieved daily rates compared to previous years. Similarly, City Lodge last year reported an increase of 11% in revenue and 31% in headline earnings, while Tsogo Sun reported that their adjusted headline earnings per share increased by 24% included with a 10% increase in average room rates<sup>12</sup>.

### **1.10.2 Employee Profile**

Hospitality is the largest employer, employing 110178. The hospitality sub-sector is the largest sub-sector and most labour intensive and therefore the biggest employer. Reported employment in the Hospitality sub-sector increased by 4.4% in 2013 and has seen a 6.7% decrease in the numbers reported for 2014. This reduction in the number of employees reported may change with the finalisation of the Mandatory grant data at the end of May 2014.

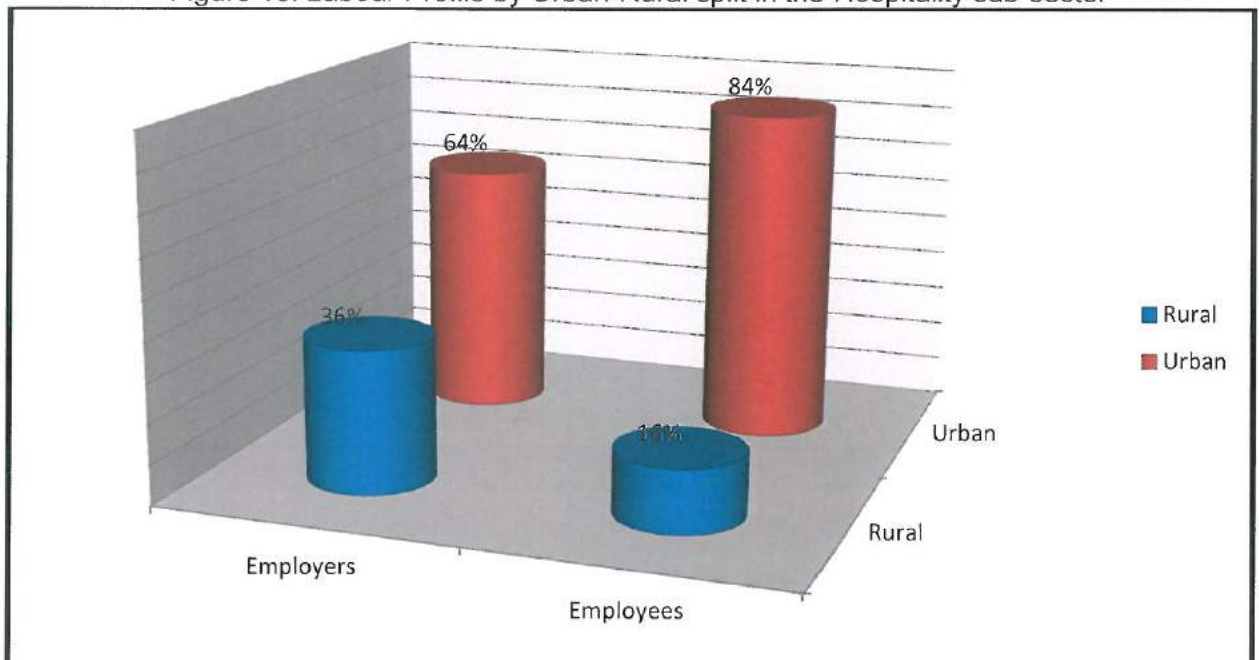
There are approximately 62645 employees that were reported by the CATHSSETA registered enterprises falling within the under 35 years age category. This is representative of 57% of the total sub-sector. There are only a mere 4% of employees within this sub-sector that are in the over 55 years age category. The race profile indicates that the sub-sector employs 76% African, 12% Coloured, 10% White and 2% Indian employees.

Figure 17: Labour Profile by province in the Hospitality sub-sector



Source: CATHSSETA SMS 2014

Figure 18: Labour Profile by Urban-Rural split in the Hospitality sub-sector



Source: CATHSSETA SMS 2014

Figure 17 and 18 indicates the labour profile of the Hospitality sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. The provinces of Gauteng and Western Cape make up the majority of over employment in the sub-sector with approximately 61% and 21% respectively. The Limpopo and Northern Cape provinces show the smallest number of employees in this sub-sector. Despite the presence of 36% of employers in rural areas, the

employee profile indicates that only 16% of the total labour in this sub-sector is contained within rural areas.

### **1.10.3 Drivers of Change**

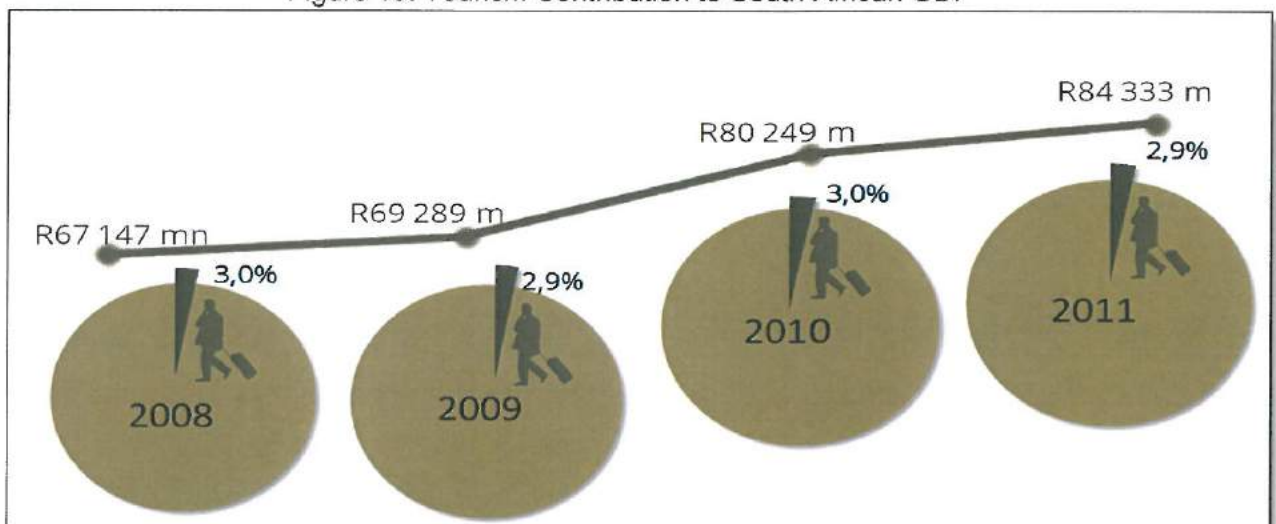
- Due the cross-sectional nature of the Hospitality and Tourism sub-sectors, the drivers of change applicable to the Travel and Tourism sub-sector are applicable here and will be covered in more details under the Drivers of change section of the Travel and Tourism sub-sector.

## 1.11 Travel and Tourism sub-sector

### 1.11.1 Economic Contribution

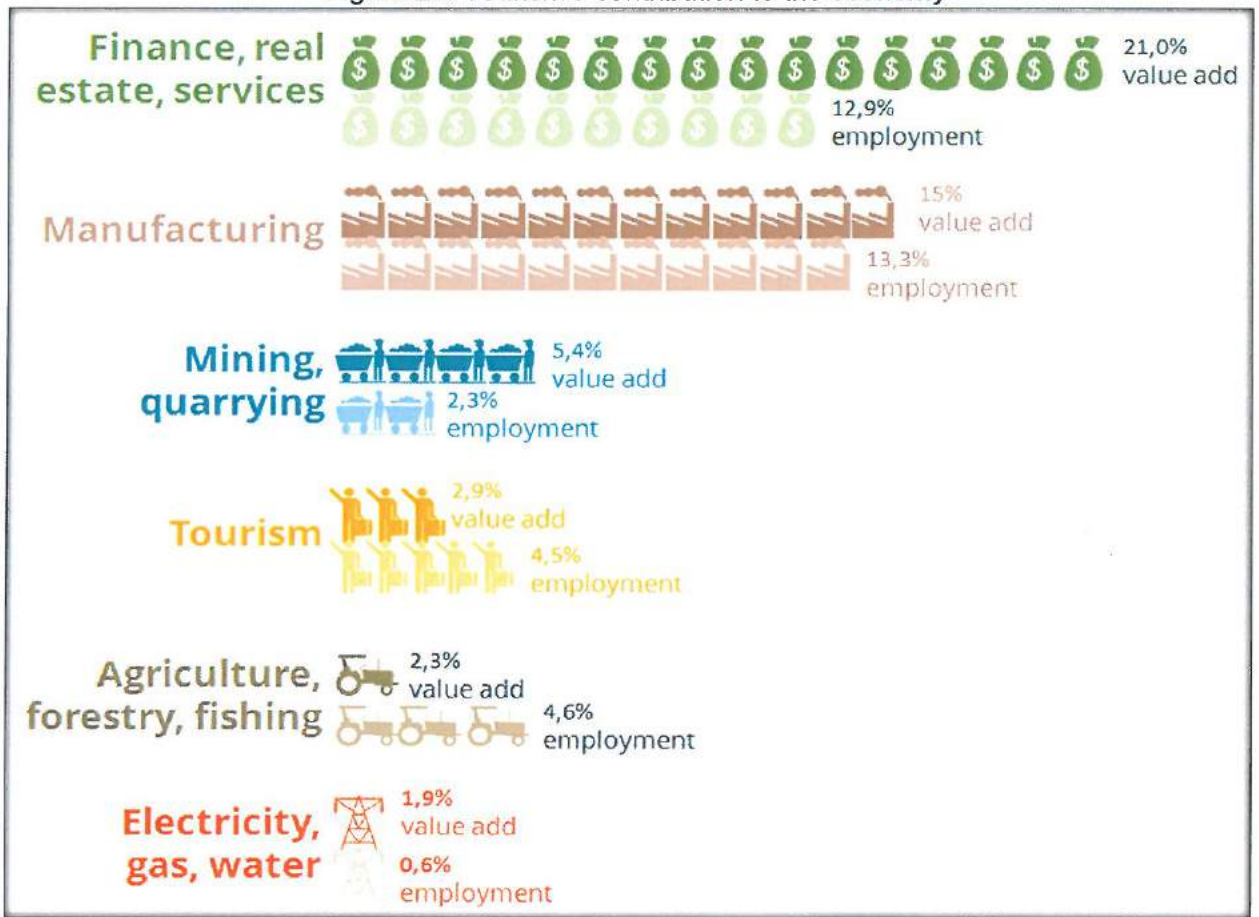
Globally the Travel and Tourism economic sector is one of the fastest growing sectors. South Africa received nearly 15 million visitors in 2013, 9.6 million of whom were tourists<sup>13</sup>. The National Department of Tourism (NDT) also predicts an increase in foreign arrivals and expects an increase from 9 933 966 in 2009 to 15 million in 2020. This is a compound annual growth rate of 3.8% and is due to a culmination of both a focused national strategy aiming to increase the number of foreign arrivals and the “knock-on” effect that the country has received due to increased international profiling from the successful staging of the 2010 FIFA World Cup.<sup>14</sup> Domestic tourism also plays a significant role, at any given time; three quarters of all tourists in South Africa are domestic Tourists<sup>15</sup>. In 2011, 13.9 million South Africans took a total of 26.3 million domestic trips. NDT expects a compound annual growth rate of 2% for domestic tourists and 5.4% for domestic trips from 2009 until 2020, which will result in 18 million adult South Africans taking a total of 54 million domestic trips in 2020.<sup>16</sup> The total domestic tourism expenditure increased from 69 billion rand in 2010 to one hundred and one billion rand in 2011, which translates to an increase of over 30 billion rand<sup>17</sup> The national tourism sector strategy seeks to increase tourism’s total direct and indirect contribution to the economy from R189.4 billion in 2009 to R318.2 billion in 2015 and R499 billion in 2020. The tourism sub-sector makes a substantial contribution to the South African economy and in 2012 the revenue generated by tourist arrivals increased by 7.6% (R5,4 billion) compared to 2011, with the key drivers of the growth being the increase in foreign arrivals and average spend per tourist.<sup>18</sup> The latest Tourism Satellite Account which has been released by Statistics SA, for the 2012 period confirms direct tourism contribution to the GDP was 3% or R93 billion. Tourism accounts for over 610 000, or 4,6%, of direct employment in the country<sup>19</sup>.

Figure 19: Tourism Contribution to South African GDP



Source: Statistics SA presentation MINMEC Meeting (10 May 2013)

Figure 20: Tourism's contribution to the economy



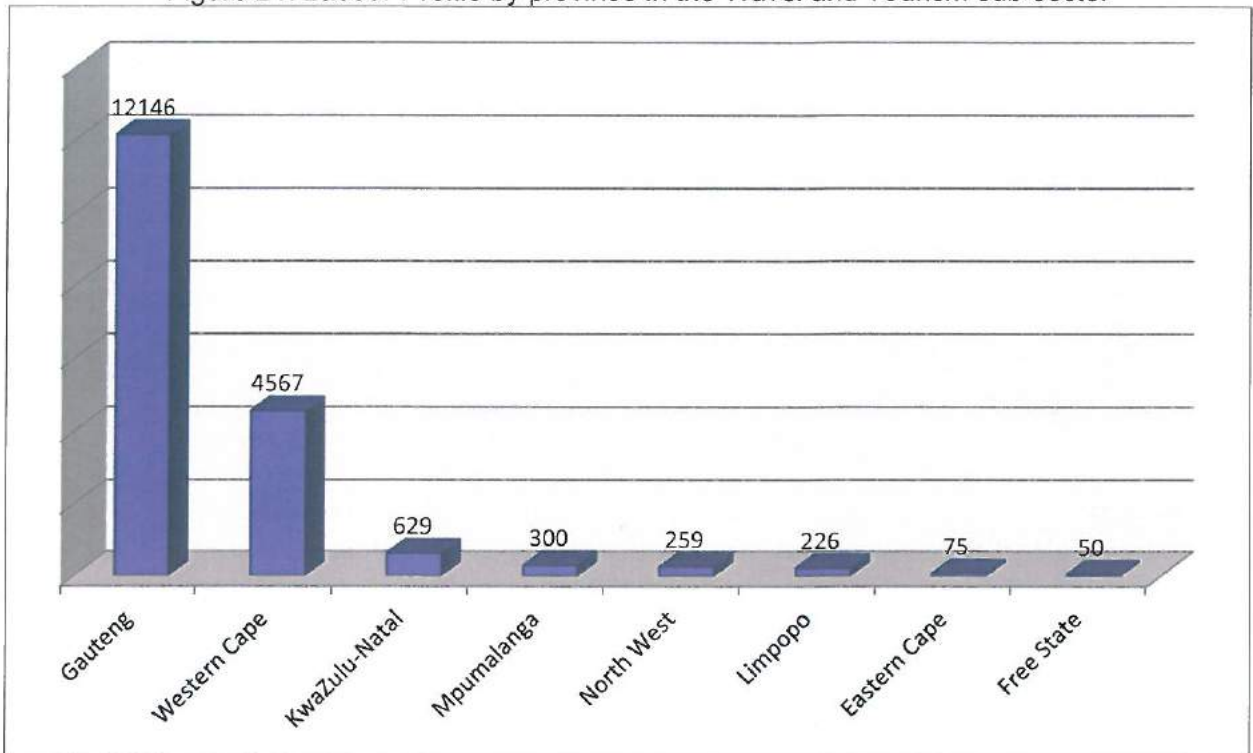
Source: Statistics SA presentation MINMEC Meeting (10 May 2013)

### 1.11.2 Employee Profile

The Travel & Tourism is the third largest sub-sector with 18252 employees having been reported by the SETA registered entities. This sub-sector, despite the current trying economic climate, is growing steadily with the total number of employees growing by 1960 in 2014. Numerous mergers and acquisitions took place within this sub-sector during 2011, which initially led to downsizing and staff reductions. However, these mergers and acquisitions has resulted in a degree of stability in the sub-sector which has attributed to the growth in the number of employees employed in the sub-sector. Globally the sector is extremely labour intensive and is a major source of employment, requiring various degrees of skill and often provides women, youth and migrant labour with a relatively easy access point into the workforce. In 2010 the sector globally accounted for 235 million jobs, which is equivalent to 8% of the total employment or 1 in 12.3 jobs.<sup>20</sup>

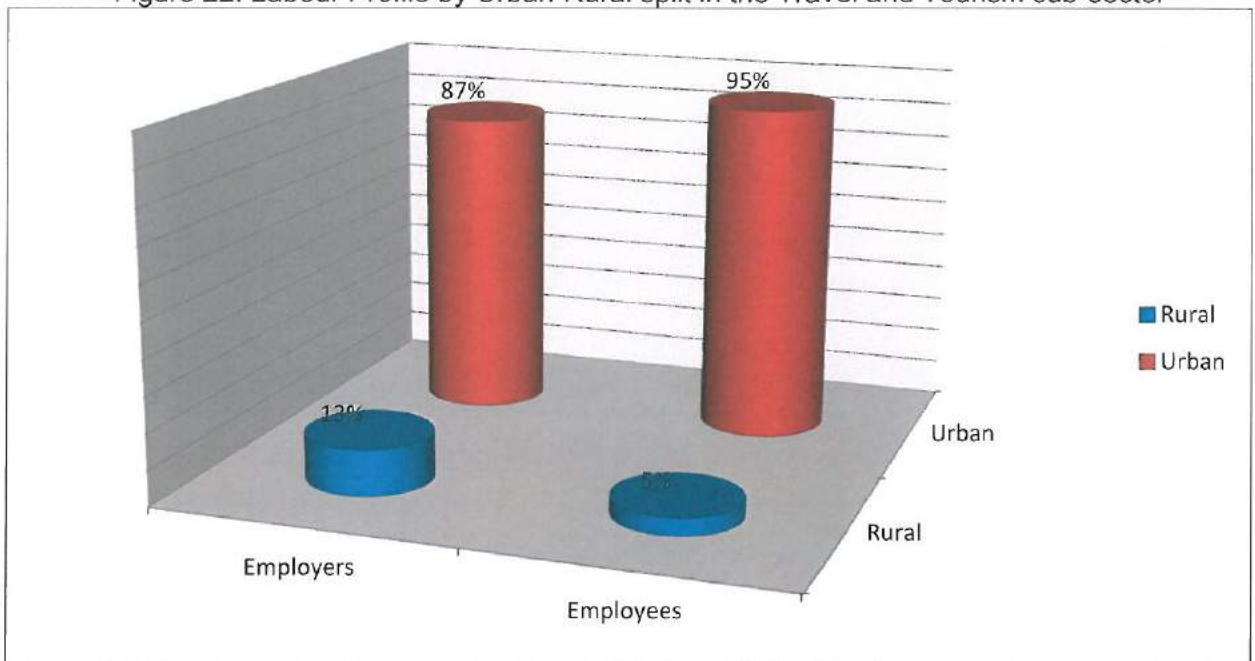
The majority of the 18252 employees fall within the under 35 years age category with 58%. 38% fall within the 35-55 years age range and 4% fall under the over 55 years age category. 9213 employees are African, followed by 5377 White, 2480 Coloured and 1182 Indian employees.

Figure 21: Labour Profile by province in the Travel and Tourism sub-sector



Source: CATHSSETA SMS 2014

Figure 22: Labour Profile by Urban-Rural split in the Travel and Tourism sub-sector



Source: CATHSSETA SMS 2014

Figure 21 and 22 indicates the labour profile of the Travel and Tourism sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. The provinces of Gauteng and Western Cape make up the majority of over employment in the sub-sector, with the

Free State and Eastern Cape provinces showing the smallest number of employees in this sub-sector. Rural distribution in this sub-sector is limited, with only 5% of employees employed in rural areas.

### 1.11.3 Drivers of Change

- **National Tourism Human Resources Development Strategy**

This is a sector based strategy covering all tourism sub sectors. It also covers all education and training provision levels from basic education to higher education and training levels. It is informed by the existing Tourism Skills Audit Report 2008 as well as NSDS II. It provides guidance on what are critical strategic imperatives Tourism HRD should focus on as well as how that should happen. It proposed priorities areas of focus and institutional mechanisms to put in place. These recommendations are expressed in the Implementation Plan of the strategy

- The National Tourism HRD Strategy has an important role to play putting place a well-coordinated approach for Tourism Human Resource Development programmes in the sector given the fragmented nature of initiatives that get implemented.
- Coordination in this regards involves different levels of training provision from Basic Education, Higher Education, Occupation-Directed Training, FET / Nated Training level and independent private training provision. It also should foster proper alignment and coherence regarding training provision and programmes involved.
- Collaboration between NDT & CATHSSETA is strongly emphasized in the strategy hence the existing MOU between the two organisation to foster coherent coordination of plans and initiatives nationally as well at provincial level

- **National Tourism Sector Strategy (NTSS)**

The NTSS is a strategic guiding document with vision that sets South Africa "To be a top 20 destinations in the world by 2020". Its main purpose is to set goals and target what should be done for sustainable tourism development and growth to happen in the sector as a build up to achieve the vision. It also identifies strategic gaps and actions to address the gaps identified. It is an overall sectoral strategic guiding document covering both public and private including communities and organised labour issues.

- The strategic gaps identified under Cluster 2.2 of the NTSS relate to relevant capacity building as follows:
- Sector is neither attracting nor retaining quality people of all skills levels
- Matriculants perceive the sector as unattractive career choice
- Poor skills levels of supervisors and managers in the sector
- Few dedicated tourism staff members and limited tourism experience knowledge and budgets in local governments

Proposed actions include fine tuning of the existing Tourism HRD Strategy and its implementation, increased formal training to be promoted, increased intake of tourism graduates by industry and expansion of tourism education not only at high schools but to junior school levels.

- **Tourism Act No.3 of 2014**

One of the relevant components of this Act is that it seeks to regulate the Tourist Guide profession. The following prohibitions have been put in place as regulatory measures: (1) No person who is not a registered tourist guide or whose registration as a tourist guide has been suspended or withdrawn, may for reward, whether monetary or otherwise, act as a tourist guide; (2) No person who has become subject to any disqualification referred to in section 50(3) may for reward, whether monetary or otherwise, act as a tourist guide; (3) No person, company or close corporation may for the promotion of any business undertaking conducted by him, her or it, employ or continue to employ as a tourist guide any person who is not a registered tourist guide or whose registration as a tourist guide has been suspended or withdrawn or who has become subject to a disqualification contemplated in subsection (2).

A pertinent consequence of this Act is that all Guides have to be qualified according to SAQA standards and will be required to renew their registration every three years.

## **1.12 Sport, Recreation and Fitness sub-sector**

The workforce contained within the Sport, Recreation and Fitness sub-sector is mainly comprised of volunteers with limited or no qualifications in the sector. There is a need to increase the number of training providers in the majority of provinces and also to review the Skills Programmes as some of the Unit Standards are "too high"<sup>c</sup>. The sub-sector places emphasis on short courses rather than full qualification due to the nature of the sub-sector. The few dynamics identified from national stakeholder consultations are that sports clubs lack exit strategies and more often cannot accommodate graduates requiring internships to enter into the sector. Further to this, not all the National Federations are structured appropriately within the sector and require basic critical skills like financial and report writing skills. Due to the combination of the Recreation sector with sport and Fitness, stakeholders have expressed concern with the lack of consideration of the Recreation sector.

### **1.12.1 Economic Contribution**

According to last study in 2007, the Sport, Recreation and Fitness sub-sector's direct contribution to GDP, was R 41 billion, which equated to approximately 2%.<sup>21</sup> Sports Tourism currently accounts for approximately 10% (R6.4 billion) of the tourism sector's contribution the South African GDP.<sup>22</sup>

### **1.12.2 Employee Profile**

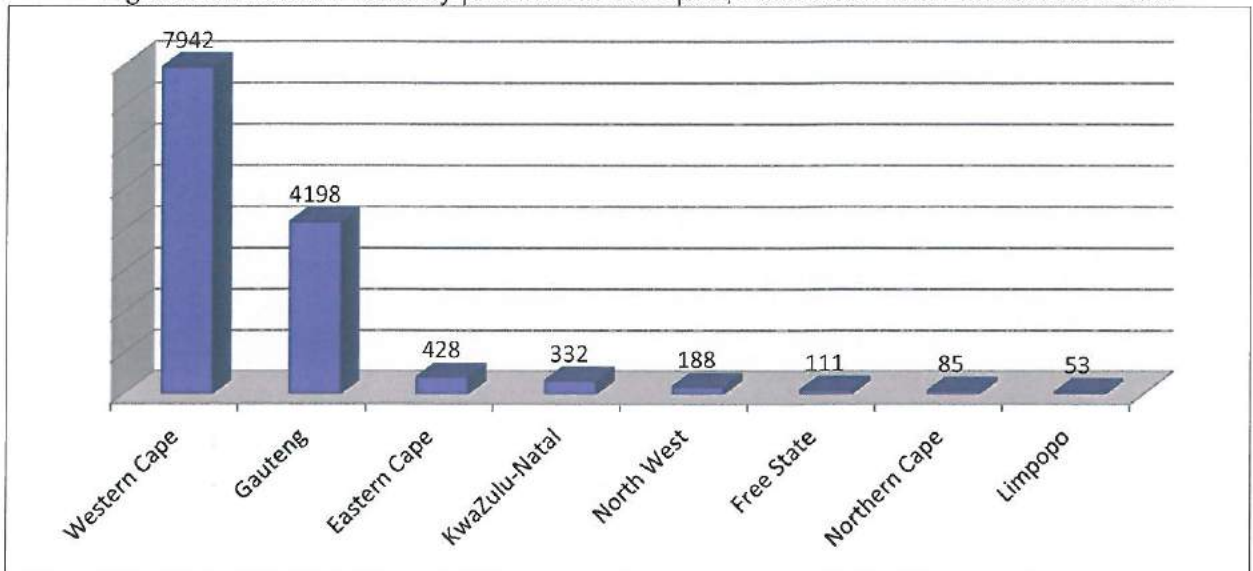
The Sport, Recreation and Fitness sub-sector has shown a decrease in the number of employees reported from the Mandatory grant data. A total of 14677 employees were reported in 2013, with a decrease to 13337 reported in 2014. The Sport, Recreation and Fitness sub-sector employs a relatively low number of full time paid employees as the industry is driven by a large number of volunteers. This is further compounded by the fact that numerous employees in the sector are employed by provincial and local governments and are therefore reported as government employees to Public Sector Education and Training Authority (PSETA) and Local Government Sector Education and Training Authority (LGSETA), this practice significantly distorts the number of employees reported in this sub-sector.

The age profile of the sub-sector reveals that 60% of the employees fall under the under 35 years age grouping, 35% fall within the 35-55 years age category and 5% are in the over 55 years age group. In terms of racial profiling, the sub-sector has 6553 African employees, followed by 4584 White employees, 1789 Coloured employees and 411 Indian employees. The number of disabled employees as reported in the Mandatory grant information provided by CATHSSETA shows that the sub-sector employs approximately 0.1% of disabled people.

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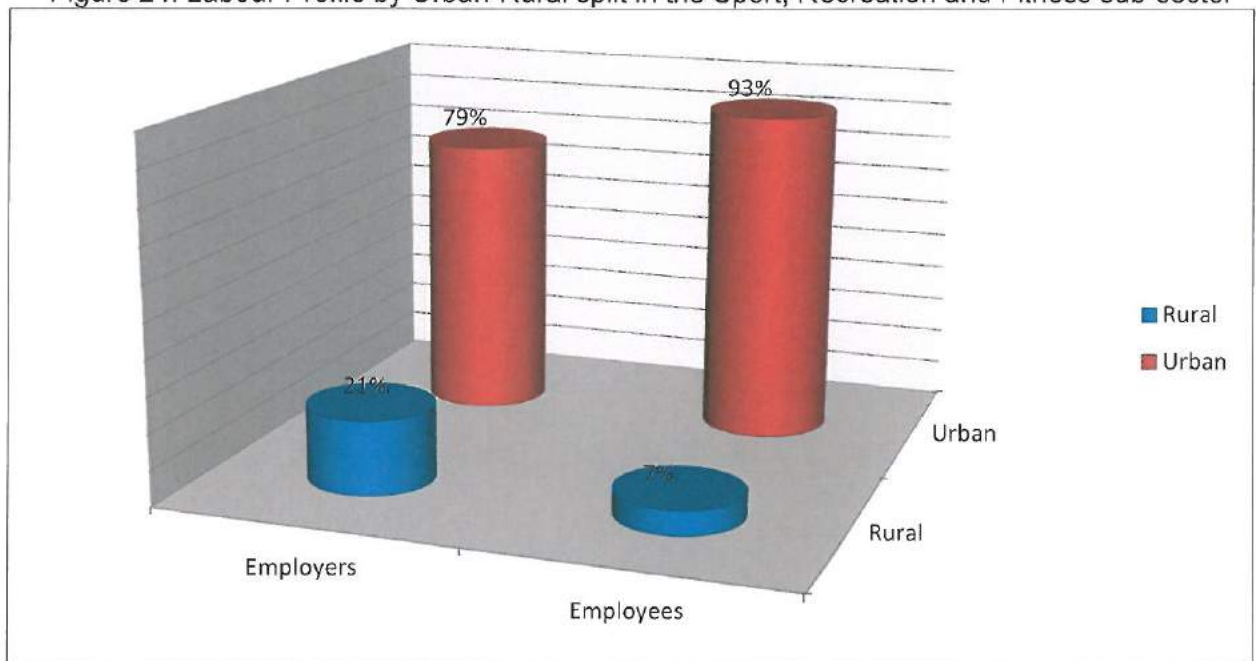
<sup>c</sup> National stakeholder workshops held in partnership with SRSA

Figure 23: Labour Profile by province in the Sport, Recreation and Fitness sub-sector



Source: CATHSSETA SMS 2014

Figure 24: Labour Profile by Urban-Rural split in the Sport, Recreation and Fitness sub-sector



Source: CATHSSETA SMS 2014

Figures 23 and 24 indicate the labour profile of the Sport, Recreation and Fitness sub-sector per province and illustrate the current urban-rural split of employers and employees in the sub-sector. The Western Cape province has the largest number of employees with 7942 employees, followed by the Gauteng with 4198 employees. Urban distribution in this sub-sector is dominated, with 93% of employees reported, employed in urban areas and 79% of employers situated in urban areas.

### 1.12.3 Drivers of Change

- **National Sport and Recreation Plan (NSRP)**

An over-arching plan that binds the various strands of the South African sport and recreation landscape together. The NSRP specifically focuses on the following strategic objectives to assist with broadening the base of sport and recreation in South Africa:

- To improve the health and well-being of the nation by providing mass participation opportunities through active recreation.
- To maximise access to sport, recreation and physical education in every school in South Africa.
- To promote participation in sport and recreation by initiating and implementing targeted campaigns.

- In order to lay a firm foundation for widening access to increased participation levels and enhance sporting excellence, capacity has to be stepped up. Infrastructure and human capital development become imperative. In developing a winning nation the NSRP has numerous objectives, most important relevant to CATHSSETA is,

- To support and empower South African coaches.
- To support and empower South African administrators and technical officials.

Considerable investment has been made in the realisation of training of coaches and administrators.

- Furthermore the NSRP can enable the sport and recreation sector to make an important contribution to the national priority of human empowerment through education and training: Training and Education through the NRSP will see an increase in:

- Number of accredited education and training programmes on offer.
- Number of accredited coaches, administrators and technical officials

CATHSSETA will play a pivotal and fundamental role in the plan by investing and participating with DHET, SAQA, SASCOC and SRSA in realising the NSRP.

- **South African Coaching Framework**

The Coaches framework as officially launched in November 2011, is regarded as a priority vehicle for sport transformation through training and development interventions aimed in particular on the professionalisation of coaching across all sporting codes within the South African context. Its vision is to create an effective, inclusive, cohesive and ethical coaching system that promotes transformation and excellence in an active and winning nation – and thereby contributing to the development and transformation of sport across various coaching levels and within different coaching domains. The Framework aims to provide skilled and qualified coaches to support the development of South Africans at all levels in sport.

Following the SACF was the development of the Long Term Coaches Development Framework in place which is regarded as the key element of SACF. The framework forms the foundation of the objectives of coaches' professionalisation and as such is aligned to international coaching skills sets whilst enabling alignment to qualifications on the NQF in support of the obtaining of credit bearing qualifications for coaches.

Investment will be required to implement the Framework in the following areas:

- employment and deployment of coaches

- education and development of coaches through the training of coach developers who will provide education and support to coaches – training of facilitators, assessors (including RPL assessors) and moderators.
- Accreditation support
- capacitating the National Federations by ensuring that the learning programmes are readily available for the National Federations
- Implementation and roll-out of RPL to enable part or full qualification conferring against recognised coaching qualifications on the NQF.

Much has already been achieved and invested in this process including the development of relevant learning programmes and RPL toolkits for the enabling of standardized training provision in the field of Sports Coaching. This likewise will enable the implementation of RPL in support of the fast-tracking of the conferring of coaches' skills programmes and qualifications across all sporting codes within South Africa.

The impact of the South African Coaching Framework will be measured on an on-going basis to ensure that all the elements focus on the quality and quantity of coaching as well as the extent to which sustainable structures are being developed to meet the needs of South African sport.

- **Sports Tourism Strategy**

A strategic intent recognizing the inextricable link between the areas of tourism and sport and recreation.

- To continue close working relationship with other allied stakeholders in the areas of tourism to enable growth and impact of sports tourism on the SA economy
- To broaden the capacity building initiatives within the sporting industry to encompass elements of tourism so as to deepen the understanding of the sports tourism element of sports development.
- The successful staging of the 2010 FIFA World Cup showed that the country has the capacity and infrastructure to host mega sporting events. 309 554 foreign tourists travelled to South Africa to specifically attend the tournament, stayed for an average of 10 nights and had total expenditure while in the country of R 3.46 billion.<sup>23</sup>
- The Sport & Recreation White Paper, identifies Sports Tourism as a key strategic area to grow both the sector and economy. SRSa together with NDT and SASCOC have developed a National Sports Tourism Strategy that aims to attract and host more international sporting events in South Africa in order to capitalise on the investment made in sports infrastructure for the 2010 FIFA World Cup.
- There is a need to identify the requirements of the Sports Tourism industry which are different and are not addressed by the qualifications currently available. There is no long term strategy or approach to retain the skills of people trained for specific major events. The aim should be to establish a pool of skilled individuals to be made available for all major events that are hosted in the country.
- To fill the gap of the absence of a proactive skills development strategy aligned to the National Sports Tourism Strategy, CATHSSETA partnered with Thebe Exhibitions and Projects Group and the University of Pretoria to conduct research into the skills development requirements of sports

tourism with the aim of formulating a Sports Tourism Skills Development Strategy. The following recommendations were made:

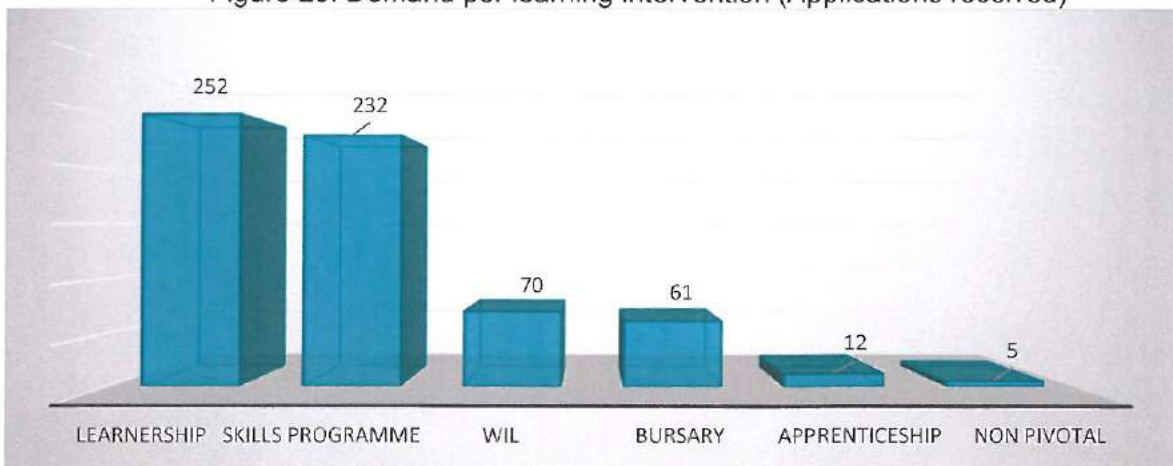
- Development of a certification programme recognising volunteers and a system to capture the skills and experience of volunteers;
- Introduction of Sports Tourism qualifications at different levels;
- Development of code of ethic for the sport tourism industry and manage quality assurance of educational institutions offering sports tourism programmes;
- Provision of bursaries to graduates pursuing careers in sports tourism;
- Development of the skills capacity of sports administrators managing federations;
- Increased partnerships between sports federations and educational institutions;
- Establishment of a professional body representing the interest of the sports tourism industry.

## 2. DEMAND FOR SKILLS

### 2.1 Discretionary Grants analysis

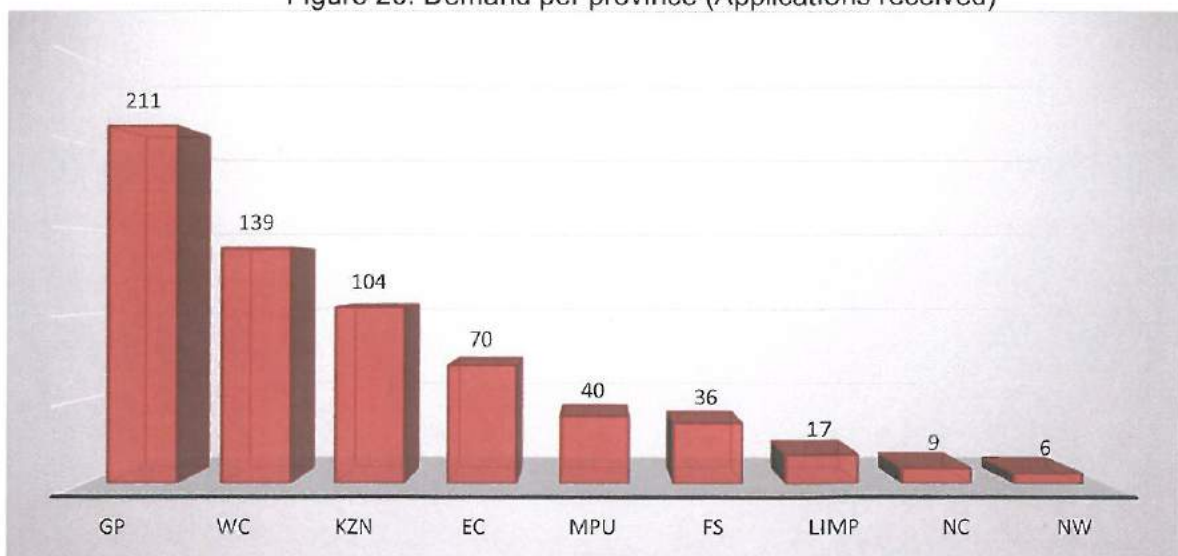
The first CATHSSETA 2014/2015 Discretionary Grant application window opened on the 1st of April 2014 and closed on the 30th of April 2014. Applications were invited from levy and non-levy paying entities, public training providers and trade unions falling within the CATHSSETA sector. A total of 632 applications were received from 375 organisations requesting to train 36322 employed and unemployed learners in various Learning programmes. Figure 25 and 26 provides a breakdown of sectoral demand per learning intervention and geographical spread. Analysis of this information allows us to further determine the needs of the sector.

Figure 25: Demand per learning intervention (Applications received)



Source: DG Applications 2014 Window 1

Figure 26: Demand per province (Applications received)



Source: DG Applications 2014 Window 1

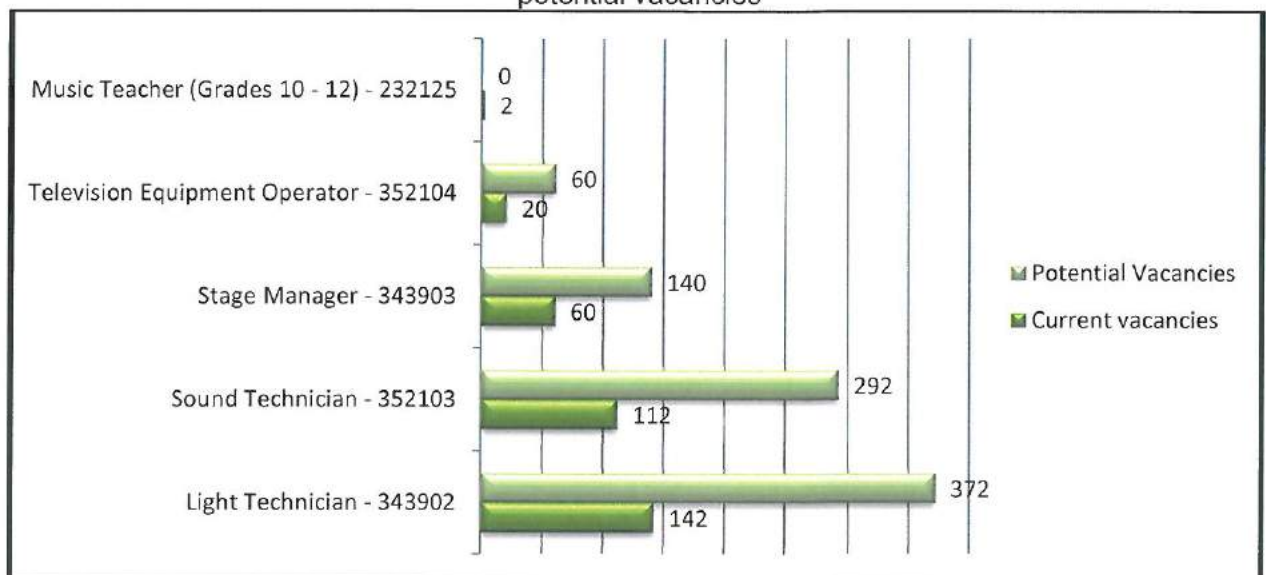
This following section looks at the 'Top 5 vacancies' per sub-sector. The top vacancies are defined to be the highest number of current and potential vacancies, combined with the degree of scarcity, indicated by the CATHSSETA registered entities submitting their Mandatory grant data. These vacancies have been subject to further consultation with the CATHSSETA chambers.

## 2.2 Arts, Culture and Heritage sub-sector

### 2.2.1 Vacancies in the sub-sector

The highest amount of current and potential vacancies reported within this sub-sector falls into the Technicians and Associate Professionals major group. Figure 27 provides an indication of the top 5 occupations for which vacancies have been reported. A critical finding is the high increase in the number of vacancies reported for the Light Technician and Sound Technician occupations as compared to the 2013 reporting period. The number of current vacancies for the Light Technician occupation has increased from 5 in 2013 to 142 in 2014, and the number of current vacancies for the Sound Technician occupation has increased from 3 in 2013 to 112 in 2014. Both these occupations have been listed on the CATHSSETA list of Scarce and Critical skills, with the Sound Technician occupation falling into the list of Top 10 Scarce skills.

Figure 27: Top 5 vacancies in the Arts, Culture and Heritage sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2014

### 2.2.2 Grant application analysis

The following table shows the demand from the sub-sector in terms of qualifications demanded:

Table 3: Qualifications demanded in the Arts, Culture and Heritage sub-sector

Qualification	Intervention
Honours degree in applied Drama & Drama Therapy	Bursary
New venture creation	Learnership
National Certificate: Music Industry Practice	Learnership
FETC: Performing Arts	Bursary
BTech: Multimedia	Bursary

Source: DG Applications 2014 Window 1

### 2.2.3 Emerging occupations and future skills

There have been three specific occupations within the sub-sector that have been identified as emerging occupations:

- Stagehands: Provides assistance in the assembly and disassembly of show productions.
- Taxidermist: Prepares artworks, specimens and artefacts artworks for collections, and arranges and constructs gallery exhibits.
- Audio Visual 3D Technician: An audio visual technician operates a wide assortment of equipment to create and project sound and visual images. His job may require him to produce simultaneous broadcasts of sounds and pictures or just one of the two media. The scope of his responsibilities may be limited to either the transmission or creation of the images or he may be expected to do both.

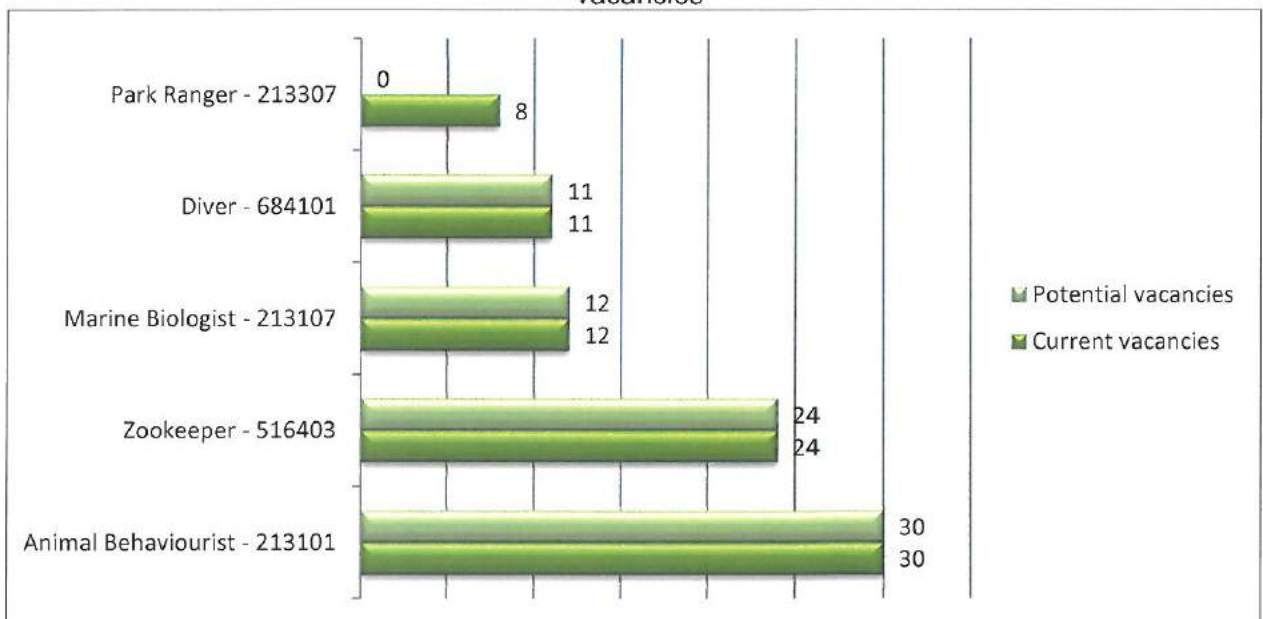
## 2.3 Conservation sub-sector

### 2.3.1 Vacancies in the sub-sector

As per Figure 28 that follows, the Animal Behaviourist, Zookeeper and Marine Biologist occupations have consistently been at the top in terms of both current and potential vacancies. Consultation with stakeholders in this sub-sector has revealed that these occupations are often difficult to fill due to the lack of appropriately qualified graduates. These findings are also echoed in the findings of the “Green Jobs: an estimate of the direct employment potential of a greening South African economy” and fall directly in the potential 232,926 green jobs in natural resource management.

The Park ranger occupation has seen a significant decline in the number of vacancies as compared to 2013, whilst the other four occupations have remained within a similar range as that reported in the 2013 period.

Figure 28: Top 5 vacancies in the Conservation sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2014

### 2.3.2 Grant application analysis

The following table shows the demand from the sub-sector in terms of qualifications demanded:

Table 4: Qualifications demanded in the Conservation sub-sector

Qualification	Intervention
National Diploma: Professional Cookery	Bursary/ Learnership
Introduction to Customer Care	Skills Programme
Anti-Rhino Poaching	Bursary/ Skills Programme
National Certificate: Nature Conservation	Learnership
National Certificate: Food & Beverage Services	Learnership

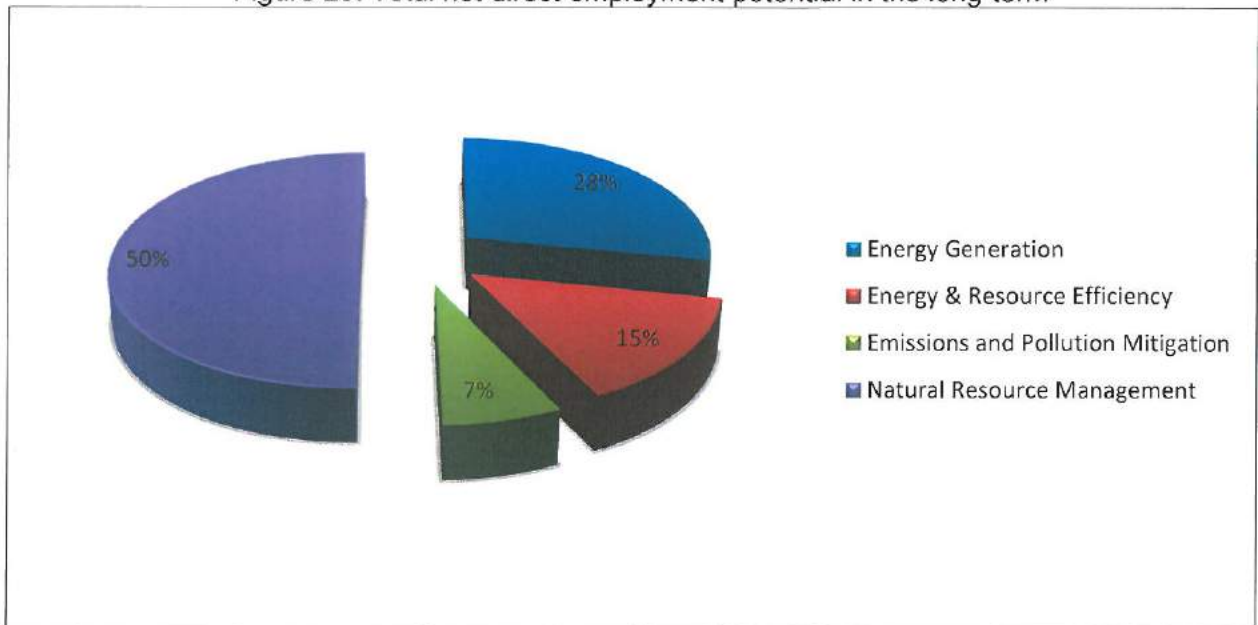
Source: DG Applications 2014 Window 1

### 2.3.3 Emerging occupations and future skills

- **Sustainability Manager:** Many large companies have employees whose job is to reduce the firm's "carbon footprint" (the amount of carbon dioxide released into the atmosphere by a company through day-to-day activities over a given period). Key sustainable practices include powering plants with renewable energy, using renewable or recycled materials for products and packaging, and reducing waste sent to landfills.
- **Environmental Economist:** These professionals help protect the environment by determining the economic impact of policy decisions relating to air, water, land and renewable-energy resources. These experts require post graduate qualifications and have either a master's degree or PhD. Jobs are emerging in the government and professional, scientific and technical services organisations.
- **Biodiversity Stewardship:** Biodiversity Stewardship officers engage, inform and negotiate with private land owners, take them through the contractual process, and support them to manage their land to achieve conservation goals.
- **Wildlife Economy Expansion:** The Wildlife Economy, broadly defined, is expanding and has tremendous potential to expand more, this economy also entails SMME's related to natural resources other than wildlife, e.g. medicinal and edible plants (e.g. aloe and marula), mopane worm, reed and wooden crafts, and more. Both FET level skills (such as monitors and community extension workers) and HE skills (such as natural resource economists, fair trade lawyers, researchers and managers for biodiversity benefit sharing and business) are needed.

### 2.3.4 Potential Demand for Green Jobs in the Environment Sector

Figure 29: Total net direct employment potential in the long-term

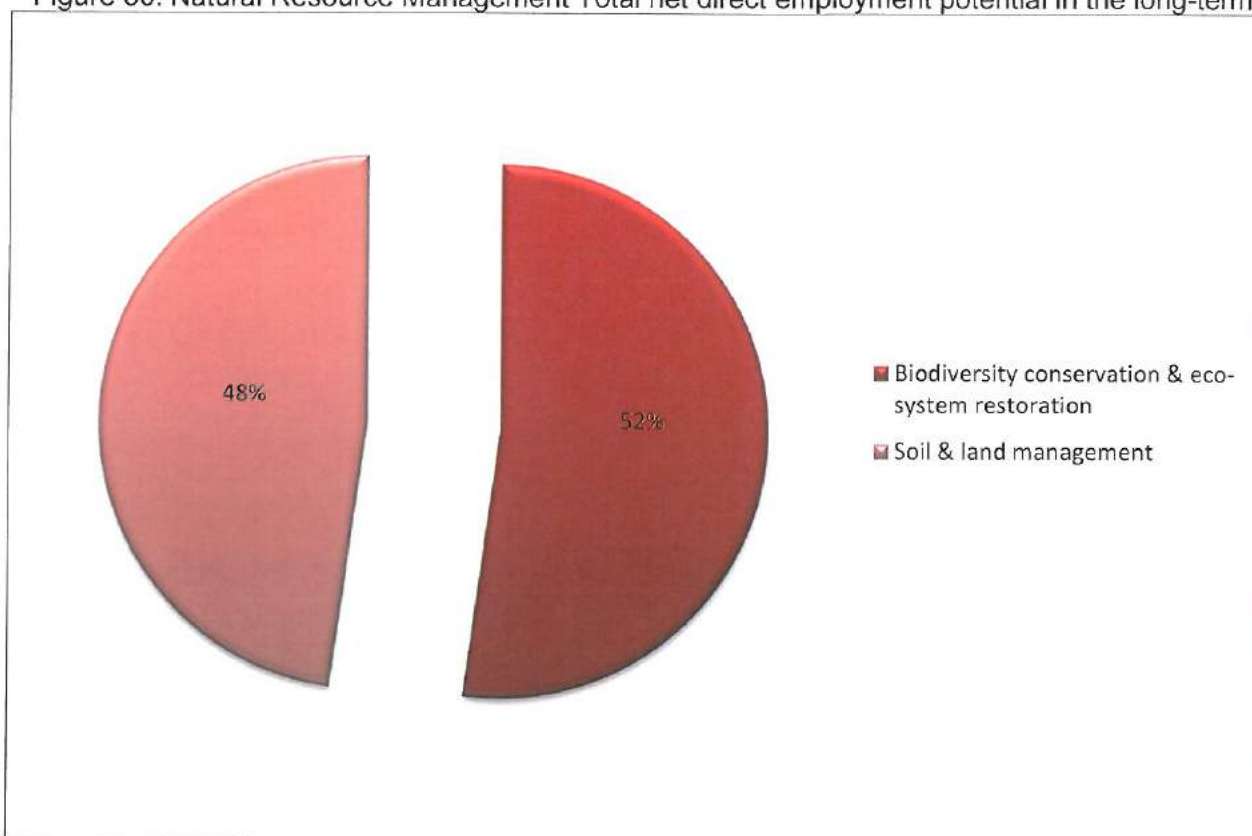


Source: DBSA 2011

Figure 29 indicates that as per the report by the Industrial Development Corporation (IDC) and the Development Bank of South Africa (DBSA) "Green Jobs: An Estimate of the direct employment

potential of a greening South African economy” the total net direct employment potential to create long terms jobs is 462,567 new jobs in the environmental sector by 2025.<sup>24</sup> The greatest potential to create these “Green Jobs” lies in Natural Resource Management, which has the potential to create 232,926 jobs or 50% of the net direct employment potential in the broad green economy category in the long – term by 2025.<sup>25</sup> The remaining 50% is split amongst Energy Generation 123,023 potential jobs (28%), Energy and Resource Efficiency 67,977 potential jobs (15%) and Emissions and Pollution Mitigation 31,641 potential jobs (7%).<sup>26</sup> The potential 232,926 green jobs in natural resource management will have a huge impact on the Conservation sub-sector, as they will fall directly under the four SIC codes that define this sub-sector that falls within CATHSSETA’s jurisdiction. While the remaining potential jobs fall under other SETA’s jurisdiction as follows Energy Generation under Energy and Water Sector Education and Training Authority (EWSETA), Energy and Resource Efficiency under both EWSETA and Manufacturing Engineering and Related Services Sector Education and Training Authority (MERSETA) and Emissions and Pollution Management under LGSETA.

Figure 30: Natural Resource Management Total net direct employment potential in the long-term



Source: DBSA 2011

Figure 30 further breaks down the potential 232,926 green jobs in natural resource management and indicates that 121,553 green jobs (52%) will be derived from biodiversity conservation and ecosystem restoration and 111,373 green jobs (48%) from Soil & land management.<sup>27</sup> However, more important than the large number of potential green jobs in natural resource management is the potential that these green jobs will be realised. The “Green Jobs: an estimate of the direct employment potential of a greening South African economy” gives the highest rating possible for both the biodiversity conservation and ecosystem restoration and the soil & land management as being

very high.<sup>28</sup> Therefore not only are there a large number of potential green jobs in the conservation sub-sector but the likelihood that this potential will be realised is very high. CATHSSETA in conjunction with the DEA, GreenMatter and the South African National Biodiversity Institute (SANBI) will be hosting a National Environmental Skills Summit and the realisation of the potential of these green jobs are one of the topics.

### 2.3.5 Demand for Skills in the Conservation Sector

The 2009 research report produced by the Human Sciences Research Council (HSRC) for the Lewis Foundation and the South African National Biodiversity Institute indicated (a) sound management of protected areas (b) establishment and strengthening of conservation understanding and competence among policy and decision makers both in the public and private sectors (c) development of capacity to implement conservation legislation at local government and municipal levels and (d) pressing threats to biodiversity would be issues driving the demand for skills development in the sector. The 4th National Report to the Convention on Biological Diversity in 2009 concluded that the issues listed above coupled with lack of capacity had an adverse impact on enforcement, research and monitoring. Therefore, while South Africa may have a laudable set of biodiversity legislation, the potential to realise the relationship between policy intent and policy outcome is closely linked with its human capacity.

The ESSP also listed the following factors that would have a significant effect on the demand for skills in the conservation sector (a) continued and increased biodiversity losses, in plant and animal species, contributed to an increased demand for protection of these species, especially threatened species. Thus, increased enforcement capacity is fundamental, but also research and monitoring capacity to establish the ongoing changes in the status of various species (b) as the expansion of protected areas increases so does the complex array of skills demanded from conservation managers increase, both from the commercial side in terms of business and operations as well as dealing with communities and landowners which require soft skills such as diplomacy and negotiation (c) the use of genetically modified organisms (GMOs) and the development of the biotechnologies requires increased monitoring capacity. Cultural uses of indigenous plant species for primary health among South Africans also require increased protection and monitoring skills (d) reduced funding for scientific research was identified as a contributory factor to skills declines. Poor funding has an adverse effect on research projects at Higher Education levels, which in turn reduces the capacity to recruit students into the environmental sciences (e) employment equity, creates the need to transform the sector by employing more black scientists and managers. Despite progress in terms of developing and employing black males, the sector has not met its target in terms of black females, which will be a priority over the next five years, as the sector is male dominated. While there are a large proportion of women in managerial posts, 41%, the majority are white females. The sector will need to address this demand through career guidance initiatives targeting black female graduates and post graduates. (f) certain environmental sub-sectors such as conservation, water affairs and agriculture are increasingly becoming highly specialised and this specialisation drives the demand for more highly skilled employees.

Additional scarce skills required in the conservation sector although not yet quantified include:

- **Compliance Officers:** There are not enough compliance officers and with the increase in illegal trade in endangered species, and dwindling natural resources versus increased development pressure, as well as large construction projects like the SIPs, this need will increase.

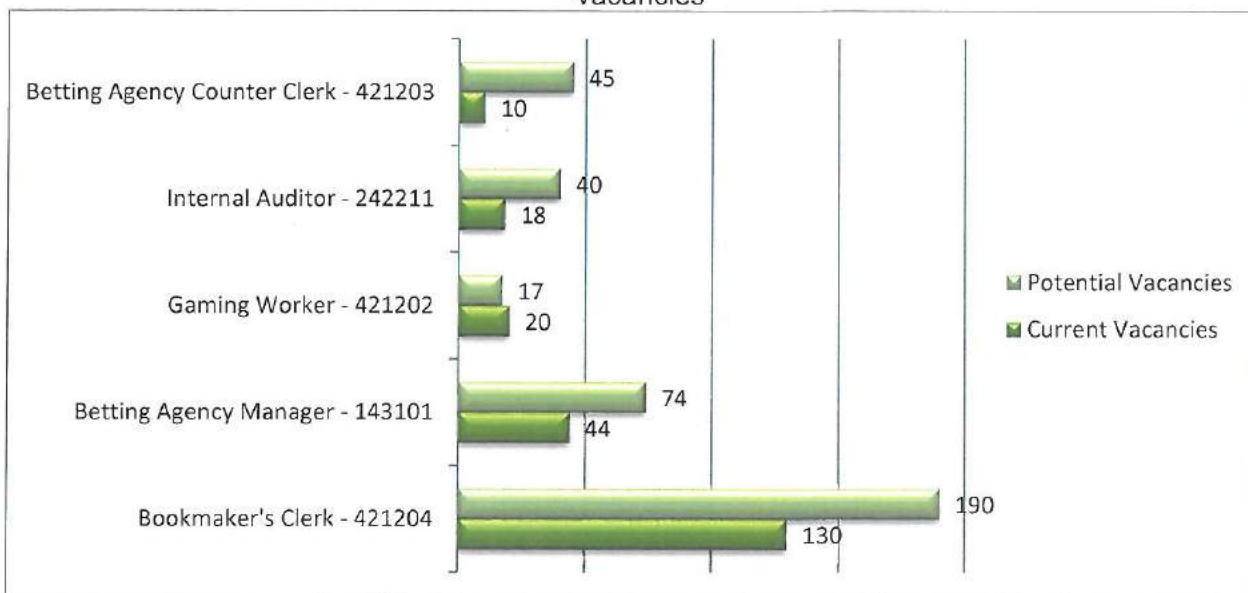
- **Curators** of plant and animal collections in museums and research institutions e.g. SANBI
- **Geneticists** - particularly important in the fight against the illegal trade in endangered species
- **Taxonomists** – in particular molecular taxonomy (SANBI)
- **Resource economists** – to quantify the value of South Africa’s biodiversity and natural resources, and inform development decisions. For example how much is a pristine conservation area worth versus how much is the same area worth as a golf course or housing estate?
- **Community Conservation and Extension Staff** (A new occupation suggested in the OFO, as none found to which these occupations could be mapped).
- **Statistical ecologists and modellers**
- **Biodiversity informatics specialists and biodiversity planners** (SANBI has long-standing vacancies and some post-graduate bursaries but a shortage of mentors)
- **Wildlife veterinarians**

## 2.4 Gaming and Lotteries sub-sector

### 2.4.1 Vacancies in the sub-sector

The top 5 vacancies in this sub-sector is presented in figure 31. A new occupation which has appeared on this Top 5 list is the Bookmakers Clerk. A significant number of vacancies have been listed for this occupation by the CATHSSETA entities that have submitted their Mandatory grant data.

Figure 31: Top 5 vacancies in the Gaming and Lotteries sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2014

### 2.4.2 Grant application analysis

The following table shows the demand from the sub-sector in terms of qualifications demanded:

Table 5: Qualifications demanded in the Gaming & Lotteries sub-sector

Qualification	Intervention
National Certificate: Accommodation Services	Learnership
FETC: Hospitality Reception	Learnership
National Certificate: Gaming Operations	Learnership
Civil Engineering Carpentry Basic	Skills Programme
National Certificate: Food & Beverage Services	Learnership

Source: DG Applications 2014 Window 1

### 2.4.3 Emerging occupations and future skills

There have been two specific occupations within the horse racing sector that have been identified as emerging occupations:

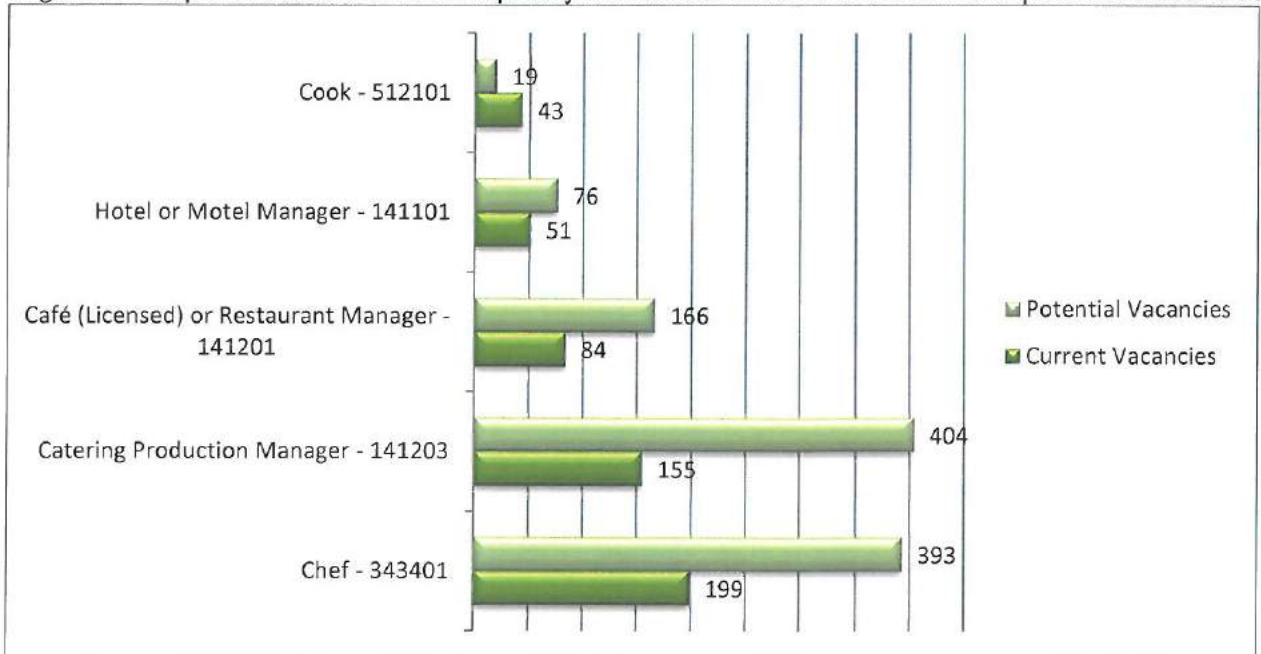
- Broadcast Systems Administrator: These Administrators provide Information Technology (IT) support to the horse racing broadcasting side of the business.
- Social Media Co-Ordinator: Social media has arguably one of the most crucial developments in the past century for connecting the fan to the sport. As such, the horse racing sector has realized that Social Media offers them better relationships, better fan engagement, alternate revenue streams and increased brand awareness. Social media web sites (like Facebook, LinkedIn and Twitter) not only provide information, but also allows for interaction. Social media coordinators use their strong communication skills to connect with the billions of people in the expanding global market. They focus on building their company's brand and identity by generating publicity and communicating with consumers through social media sites.

## 2.5 Hospitality sub-sector

### 2.5.1 Vacancies in the sub-sector

Figure 32 indicates that from 5 occupations in the Hospitality sub-sector, the Chef, Catering Production Manager and Cafe (Licensed) or Restaurant Manager occupations have the highest number of vacancies. The Managerial occupations such as the Cafe (Licensed) or Restaurant Manager, Catering Production Manager and Hotel or Motel Manager are very common managerial vacancies in the Hospitality sub-sector, which feature consistently among the highest vacancies. Various interventions such as Management Development Programmes or bursaries could be used to address these vacancies in the sub-sector.

Figure 32: Top 5 vacancies in the Hospitality sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2014

The Chef occupation remains the top occupation in terms of vacancies. There has been a 27% decrease in the current number of vacancies in the Chef occupation as compared to the 2013 period. However, this is accompanied by an almost 100% increase in the number of potential vacancies for this occupation.

### 2.5.2 Grant application analysis

The following table shows the demand from the sub-sector in terms of qualifications demanded:

Table 6: Qualifications demanded in the Hospitality sub-sector

Qualification	Intervention
Diploma in Hotel Management	Bursary
FETC: Generic Management	Learnership
National Certificate: Professional Cookery	Learnership
National Certificate: Accommodation Services	Learnership

Qualification	Intervention
National Certificate: Food & Beverage Services	Learnership

Source: DG Applications 2014 Window 1

### 2.5.3 Emerging occupations and future skills

There have been three specific occupations that have been identified as emerging occupations:

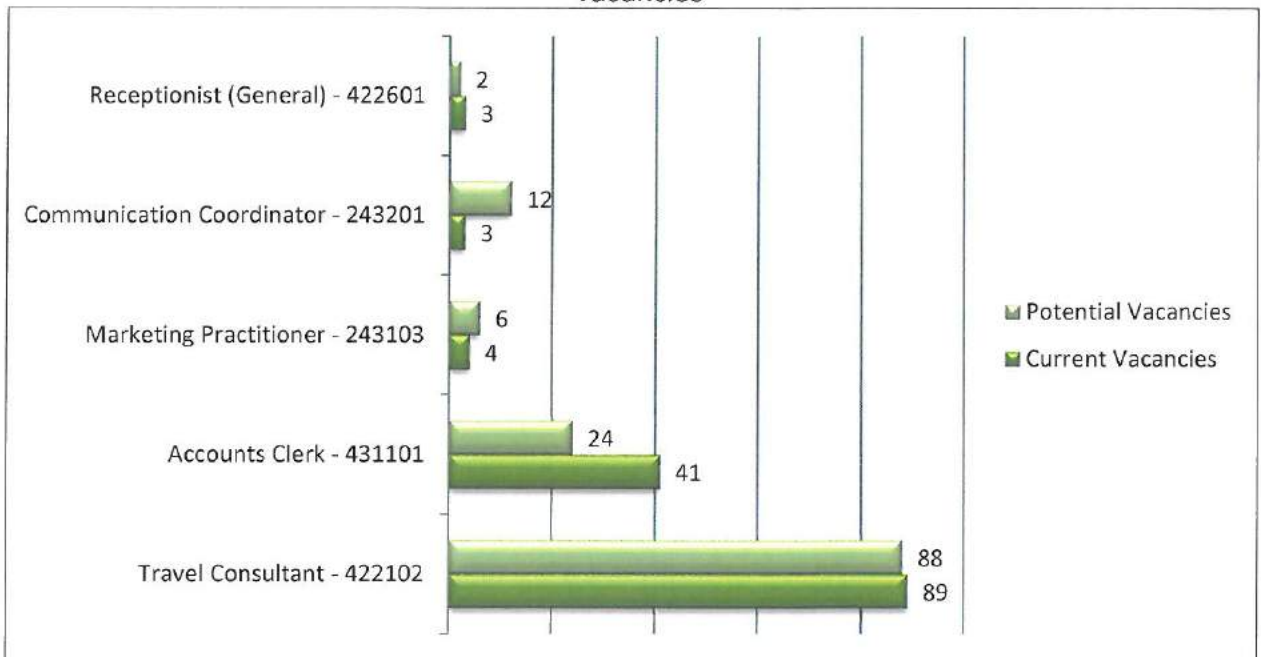
- **Barista:** Found within the restaurants sector, these individuals prepare or serve specialty coffee or other beverages and serve food such as baked goods or sandwiches to patrons.
- **Spa managers within hotels and bed and breakfast establishments:** Most hotels have now include spas as part of their amenities offered to their guest. The Spa managers plan, direct or coordinate activities of a spa facility. This includes coordinating programmes, scheduling, directing staff and overseeing financial activities.
- **Revenue managers within hotels:** These individuals analyse trends in the hotel sector and track rates of competitors to ensure optimal pricing of their products.

## 2.6 Travel and Tourism sub-sector

### 2.6.1 Vacancies in the sub-sector

Figure 33 that follows shows that the Travel Consultant occupation still ranks the highest amongst the vacancies in the sub-sector. The total number of current vacancies increased from 29 in 2013 to 89 in 2014 and the number of potential vacancies have increased from 65 in 2013 to 88 in 2014. This occupation has consistently been listed on the list of Scarce and Critical skills and interventions have been designed aimed at trying to address this need from employers.

Figure 33: Top 5 vacancies in the Travel and Tourism sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2014

### 2.6.2 Grant application analysis

The following table shows the demand from the sub-sector in terms of qualifications demanded:

Table 7: Qualifications demanded in the Travel and Tourism sub-sector

Qualification	Intervention
National Diploma: Travel & Tourism	Bursary
National Certificate: Fast Food Services	Learnership
National Certificate: General Travel	Learnership
National Certificate: Professional Cookery	Learnership
National Certificate: Food & Beverage Services	Learnership

Source: DG Applications 2014 Window 1

### 2.6.3 Emerging occupations and future skills

The following occupations have been identified as emerging occupations within this sub-sector:

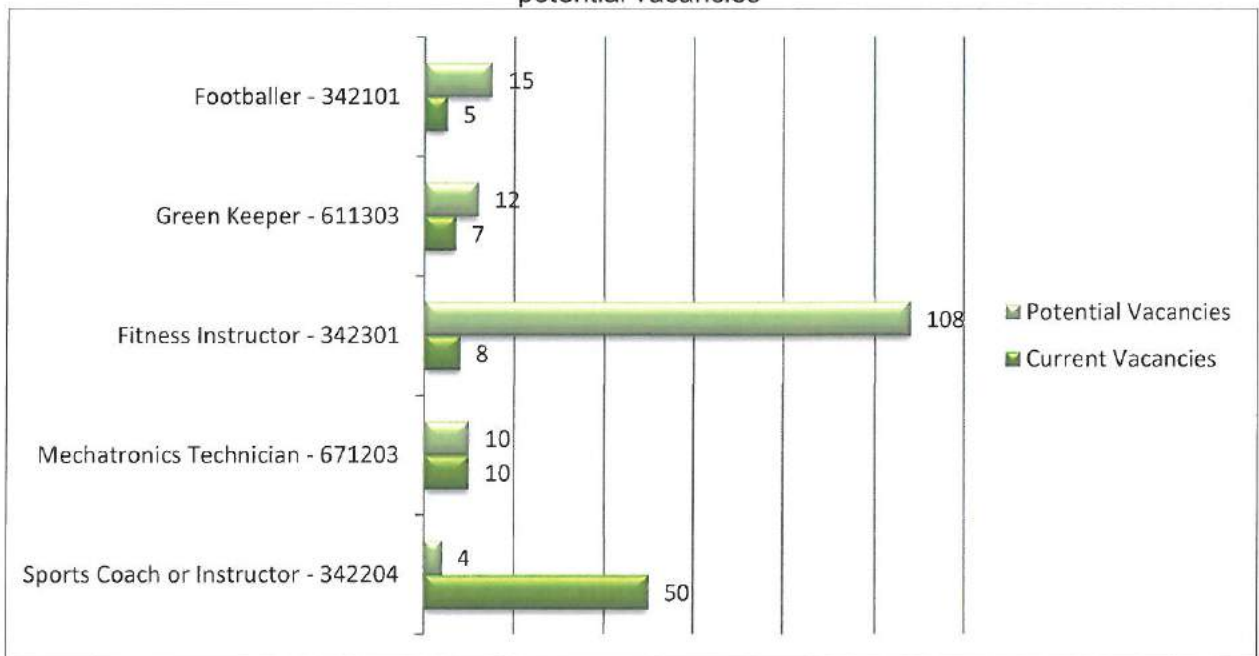
- Product and Contracting Executive Tour operators: The Product Developers are normally found in the Wholesale and Retail sectors. Their key function is to make product development decisions which focus on building relationships with suppliers and negotiating rates and product offerings.
- Independent Travel Consultant/Professional Travel agency: This consultant is a highly experienced travel professional normally at a senior level. They are able to sell and consult on multiple global and local destinations, they partner with travel brands and consortia who provide marketing, advertising and product offerings in order for the consultant to manage their own client base, and allows the consultant to set their own remuneration levels. They normally operate on an individual basis.

## 2.7 Sport, Recreation and Fitness sub-sector

### 2.7.1 Vacancies in the sub-sector

Figure 34 below provides the top 5 occupations with the highest number of vacancies. The Fitness Instructor and Sports Coach or Instructor occupations features in this sub-sector with the highest number of vacancies. The potential vacancies of the Fitness instructor has increased from 76 in 2013 to 108 in 2014, whilst the Sports Coach or Instructor occupation has had an increase in the number of current occupations with the number increasing from 10 in 2013 to 50 in 2014.

Figure 34: Top 5 vacancies in the Sport, Recreation and Fitness sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2014

### 2.7.2 Grant application analysis

The following table shows the demand from the sub-sector in terms of qualifications demanded:

Table 8: Qualifications demanded in the Sport, Recreation and Fitness sub-sector

Qualification	Intervention
FETC: Sports Administration	Bursary
BTech: Sports Management	Bursary
National Certificate: Fitness	Learnership
Bachelors degree in Human Movement Science	Bursary
Masters: Sport & Recreation Management	Bursary

Source: DG Applications 2014 Window 1

### 2.7.3 Emerging occupations and future skills

Corporate Wellness and Leisure Consultants and Practitioners are emerging occupations, and while some companies see wellness as a luxury, many others are embracing it as there is a direct

correlation between their employees' wellness and improved productivity and efficiency. Employees are cared for and in good health they are able to deliver optimum performance under pressure.

During the consultative workshops held with stakeholders in the SRF sub-sector, the occupations of Doping Officer, Sports Arbitrator and Biomechanist were indicated as emerging occupations required by the industry. Further to this, Talent identification practitioners, Classifiers and Match coders were also identified.

#### **2.7.4 Demand for Skills in the Sport Sub-sector**

Sport in South Africa relies heavily on the services of volunteer administrators, coaches and technical officials, who for the love of their sport code supply their services, skills and manpower to ensure that all managerial and administrative duties are completed, athletes are properly coached, rules are obeyed by officiators and an ethic code of conduct is implemented by all these role players. As these volunteers are not remunerated and the National Federations they belong to are exempted from paying the skills levy, the skills needs of these volunteers are not captured.

From late 2009 to early 2010 SASCOC conducted an audit of its National Federations and their human and physical resources. The results of this audit indicate that there is an urgent need to train these volunteers, and it is recommended that over the next 5 years (a) 11,000 sports coaches go through an RPL process to recognise the skills they already obtained and then, where necessary, receive training in areas they still need to develop; (b) 500 Umpires and 500 Sports Officials either receive short courses, skills programmes or Learnerships to enhance their skills when officiating at events. SRSA through its Strategic Plan wishes to support sports at a club and community level. It is envisaged that 1,135 clubs would have been developed by 2016. School sport, being at the centre of discussion of SRSA, is receiving priority to ensure that teachers are trained effectively in code specific coaching, technical officiating and sports administration to support programmes for both increased participation and high performance sport.

### 3. SUPPLY OF SKILLS

#### 3.1 Arts, Culture and Heritage sub-sector

##### 3.1.1 Education Profile

Table 9: Education profile of employees in the Arts, Culture and Heritage sub-sector

Education Levels	Employees
ABET	228
NQF 1,2	446
NQF 3,4,5,6	937
NQF 7,8,9,10	364
Total	1975

Source: CATHSSETA SMS 2014

Table 10: HEI Enrolments and graduates in the Arts, Culture and Heritage sub-sector

	2012		2011		2010	
	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates
DANCE	333	79	231	44	212	70
DESIGN AND APPLIED ARTS	3 567	880	3 629	752	3 547	862
DRAMA/THEATRE ARTS	2 282	628	2 172	531	1 882	468
FILM/VIDEO AND PHOTOGRAPHIC ARTS	1 216	371	1 305	361	1 258	341
FINE AND STUDIO ART	3 280	730	3 578	730	3 254	667
MUSIC	2 667	448	2 617	465	2 467	432
VISUAL AND PERFORMING ARTS, OTHER	31	17	39	25	49	27
<b>TOTAL</b>	<b>13 376</b>	<b>3 153</b>	<b>13 572</b>	<b>2 908</b>	<b>12 689</b>	<b>2 867</b>

Source: DHET HEMIS data 2010-2012

Table 9 indicates that there are 1975 employees in total whom have been reported by the CATHSSETA registered entities for the 2014 period. Of this figure, the majority of employees have skills at a middle level of NQF levels 3, 4, 5 and 6. This majority makes up 47% of the total employees in the sub-sector. The high occurrence at the middle level skills category is indicative of the various types of occupations in this sub-sector that require such qualifications, which are typically in the middle management and professional OFO major groups.

Table 10 illustrates the total enrolments and graduates in sub-sector specific study areas from Higher Education Institutions (HEIs) from 2010 to 2012. Enrolments have increased by 5.6% from 2010 to 2013 and persons graduating from these HEIs have also increased by 10%.

### 3.1.2 Occupational Profile

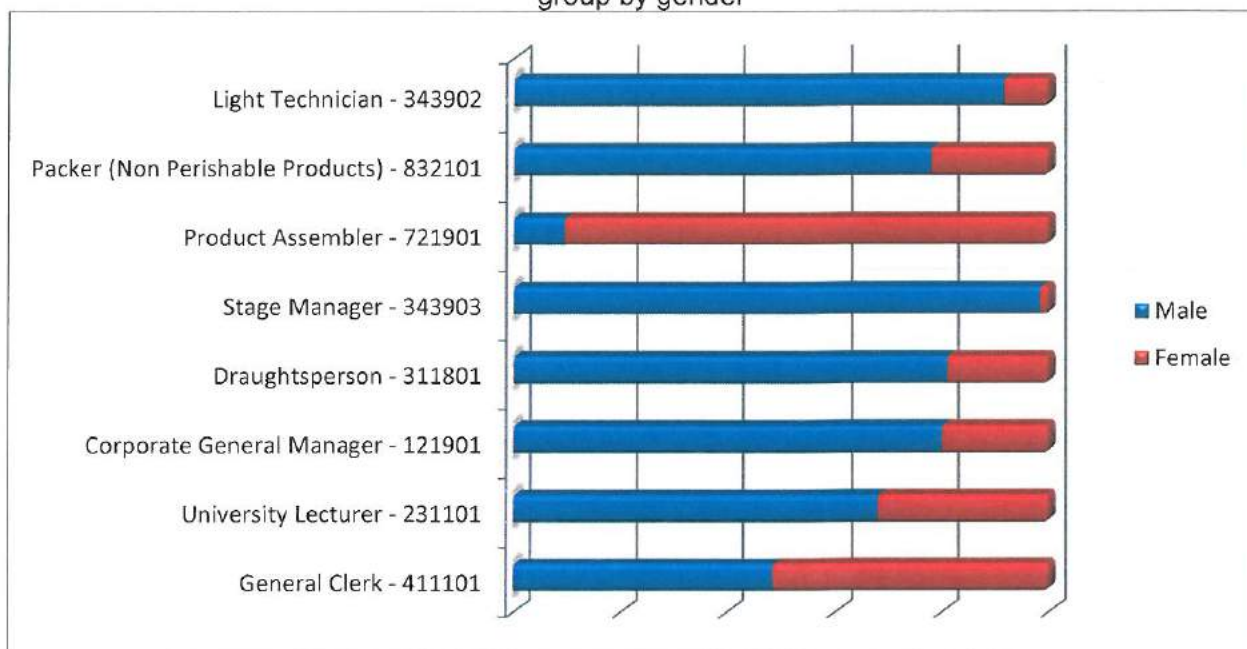
Table 11: Employees by Race, Gender, Disability and OFO Major Group for the Arts, Culture and Heritage sub-sector

OFO Major Group	African			Coloured			Indian			White			Grand Total		
	M	F	D	M	F	D	M	F	D	M	F	D		Tot.	
Managers	19	6	0	15	7	0	14	3	0	17	146	71	0	217	281
Professionals	15	12	0	6	3	0	7	4	0	11	108	63	0	171	218
Clerical Support Workers	52	40	0	208	231	0	6	11	0	17	73	144	0	217	765
Elementary Occupations	73	43	0	0	1	0	0	0	0	0	6	0	0	6	123
Plant & Machine Operators & Assemblers	48	73	1	2	2	0	0	1	0	1	2	8	0	10	136
Service and Sales Workers	13	16	0	4	1	0	2	0	0	2	5	9	0	14	50
Skilled Agri Forestry Fishery, Craft Trades	36	4	1	1	0	0	0	0	0	0	6	1	0	7	48
Tech. & Ass. Professionals	129	32	0	31	12	0	5	6	0	11	88	51	0	139	354
<b>Grand Total</b>	<b>385</b>	<b>226</b>	<b>2</b>	<b>611</b>	<b>257</b>	<b>0</b>	<b>524</b>	<b>25</b>	<b>0</b>	<b>59</b>	<b>434</b>	<b>347</b>	<b>0</b>	<b>781</b>	<b>1975</b>
<b>Percentage</b>	<b>31%</b>			<b>27%</b>			<b>3%</b>			<b>39%</b>			<b>100%</b>		

Source: CATHSSETA SMS 2014

Of the 1975 employees classified according to race, gender and OFO major group, Table 11 illustrates that in this sub-sector, White employees constitute 39% of the entire workforce, followed by African employees at 31%, Coloured employees at 27% and Indian employees at 3%. Male employees make up the majority of the sub-sector, composing 57%. Disabled persons however are notably scarce with only a 0.1% presence. The 8 OFO major groups have been further explored in order to gain additional insight into the supply of skills in the sub-sector, along with the gender profile of employees occupying these occupations. From Table 11, it is quite apparent that in the Manager OFO major group, this sub-sector is dominated by White employees. Of the total 281 occupations in this major group, 77% of positions are held by White employees.

Figure 35: Most common occupations in the Arts, Culture and Heritage sub-sector per OFO major group by gender



Source: CATHSSETA SMS 2014

Figure 35 illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered entities in the sub-sector. It is evident that the majority of these occupations is dominated by males, with only the Product Assembler occupation dominated by females.

### 3.1.3 Chamber priorities and achievements

During the 2013/2014 period, the Arts, Culture and Heritage sub-sector prioritised the following occupations, in line with the Scarce and Critical skills for the period. The list below indicates the scarce skills addressed and the number of individuals trained.

- Musician-Instrumental – A total of 30 individuals were trained through Bursaries and Learnerships.
- Gallery or Museum Guides - A total of 10 individuals were trained through Skills Programmes and Learnerships.
- Arts & Culture Administrators/ Manager - A total of 25 individuals were trained through Bursaries, Internships and Management Development Programmes.
- Archivists – The chamber targeted to train at least 13 individuals through bursaries and research grants, however, were unable to achieve this target.

- Sculptors – A total of 10 individuals were trained through Learnerships, Skills Programmes and AET programmes.

## 3.2 Conservation sub-sector

### 3.2.1 Education Profile

Table 12: Education profile of employees in the Conservation sub-sector

Education Levels	Employees
ABET	3524
NQF 1,2	4297
NQF 3,4,5,6	3102
NQF 7,8,9,10	1177
Total	12100

Source: CATHSSETA SMS 2014

Table 13: HEI Enrolments and graduates in the Conservation sub-sector

Conservation	2012		2011		2010	
	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates
BOTANY/PLANT BIOLOGY	1 969	375	1 815	280	1 885	294
ZOOLOGY/ANIMAL BIOLOGY	1 679	356	1 554	318	1 609	343
ECOLOGY, EVOLUTION, SYSTEMATICS AND POPULATION BIOLOGY	1 416	376	1 185	322	1 528	368
<b>TOTAL</b>	<b>5 064</b>	<b>1 107</b>	<b>4 554</b>	<b>920</b>	<b>5 022</b>	<b>1 005</b>

Source: DHET HEMIS data 2010-2012

As per Table 12, there are 12100 employees in total reported for the 2014 period. Of this figure, the majority of employees have skills at a low level of NQF levels 1 and 2, followed closely by employees falling within the middle levels skills category of NQF levels 3, 4, 5 and 6. It must be noted that there is also a scarcity of qualified graduates at NQF levels 7, 8, 9 and 10, particularly in the Conservation and Environment sub-sector where vacancies remain unfilled due to a lack of suitably qualified graduates.<sup>d</sup>

Table 13 illustrates the total enrolments and graduates in sub-sector specific study areas from Higher Education Institutions (HEIs) from 2010 to 2012. Enrolments have increased by 0.8% from 2010 to 2013 and persons graduating from these HEIs have also increased by 10%.

<sup>d</sup> Skills concerned identified during stakeholder workshops with the Conservation and Environmental sub-sector and also from the ESSP.

### 3.2.2 Occupational Profile

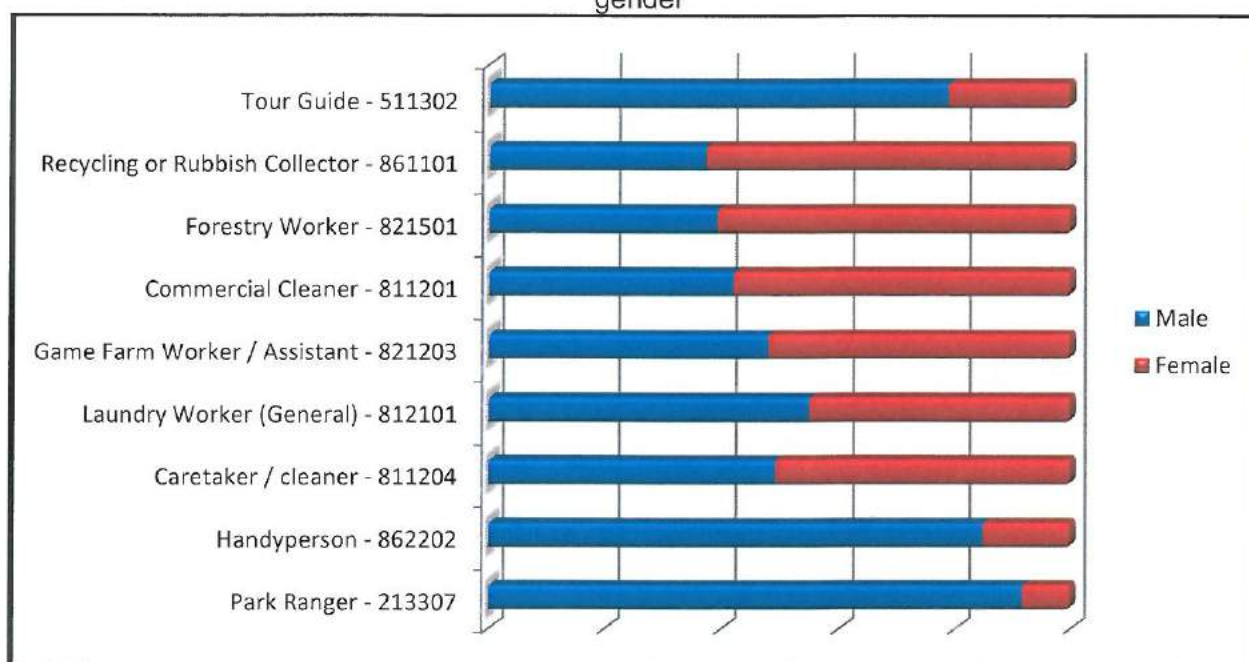
Table 14: Employees by Race, Gender, Disability and OFO Major Group for the Conservation sub-sector

OFO Major Group	African			Coloured			Indian			White			Grand Total
	M	F	Tot.	M	F	Tot.	M	F	Tot.	M	F	Tot.	
Managers	150	111	261	12	12	24	8	5	13	150	94	244	542
Professionals	2273	313	2586	181	55	236	13	16	29	222	129	351	3202
Clerical Support Workers	137	287	424	12	75	87	2	15	17	18	150	168	696
Elementary Occupations	3363	1866	5229	64	95	159	1	2	3	10	3	13	5404
Plant & Machine Operators & Assemblers	267	11	278	35	4	39	0	0	0	0	0	0	317
Service and Sales Workers	558	259	817	67	37	104	0	4	4	48	28	76	1001
Skilled Agri Forestry Fishery, Craft Trades	164	50	214	83	18	101	4	0	4	26	3	29	348
Tech. & Ass. Professionals	216	186	402	21	27	48	7	10	17	49	74	123	590
<b>Grand Total</b>	<b>7128</b>	<b>3083</b>	<b>10211</b>	<b>475</b>	<b>323</b>	<b>798</b>	<b>35</b>	<b>52</b>	<b>87</b>	<b>523</b>	<b>481</b>	<b>1004</b>	<b>12100</b>
<b>Percentage</b>	<b>84%</b>			<b>7%</b>			<b>1%</b>			<b>8%</b>			<b>100%</b>

Source: CATHSSETA SMS 2014

Of the 12100 employees classified according to race, gender and OFO major group, Table 14 illustrates that in this sub-sector, African employees constitute 84% of the entire workforce, followed by White employees at 8%, Coloured employees at 7% and Indian employees at 1%. The majority of the sub-sector is made up of Male employees, with male employees making up 67%. This is reflective of the fact that this sector has historically been dominated by male employees however, the promotion of the Green Economy and Green Jobs is changing this and bringing about transformation of the sub-sector as more and more female employees are attracted to and employed in the sub-sector. Employees falling into the Elementary Occupations OFO major group dominate the sub-sector with a total of 5404 employees. Due to the scientific nature of the work in this sub-sector, the second highest number of employees is seen in the Professionals OFO major group, making up 26% of the total number of employees in the Conservation sub-sector.

Figure 36: Most common occupations in the Conservation sub-sector per OFO major group by gender



Source: CATHSSETA SMS 2014

Figure 36 illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered entities in the sub-sector. With the exception of the Park Ranger and Tour Guide occupations, the sub-sectoral occupations reported above, have an approximately even distribution amongst males and females.

### 3.2.3 Chamber priorities and achievements

During the 2013/2014 period, the Conservation sub-sector prioritised the following occupations, in line with the Scarce and Critical skills for the period. The list below indicates the scarce skills addressed and the number of individuals trained.

- Environmental Scientist; Biotechnologist; Botanist; Zoologist – A total of 20 individuals were trained through Bursaries and Research Grants.
- Park Ranger; Conservation Officer - A total of 20 individuals were trained through Bursaries and Research Grants.

- Environmental Practices Inspector - A total of 16 individuals were trained through Work Integrated Learning interventions.

### 3.3 Gaming and Lotteries sub-sector

#### 3.3.1 Education Profile

Table 15: Education profile of the Gaming and Lotteries sub-sector

Education Levels	Employees
ABET	539
NQF 1,2	1423
NQF 3,4,5,6	20322
NQF 7,8,9,10	1564
Total	23848

Source: CATHSSETA SMS 2014

Table 15 indicates that there are 23848 employees in total whom have been reported by CATHSSETA registered enterprises for the 2014 period. Of this figure, the majority of employees have skills at a middle level of NQF levels 3, 4, 5 and 6. This majority makes up 85% of the total employees in the sub-sector. The high occurrence at the middle level skills category is indicative of the various types of occupations in the Gaming and Lotteries sub-sector that require such qualifications, which are typically in the middle management and the clerical support workers OFO major groups.

As there are no qualifications currently offered at HEIs that are specific to the Gaming and Lotteries sub-sector, HEMIS data has not been included.

### 3.3.2 Occupational Profile

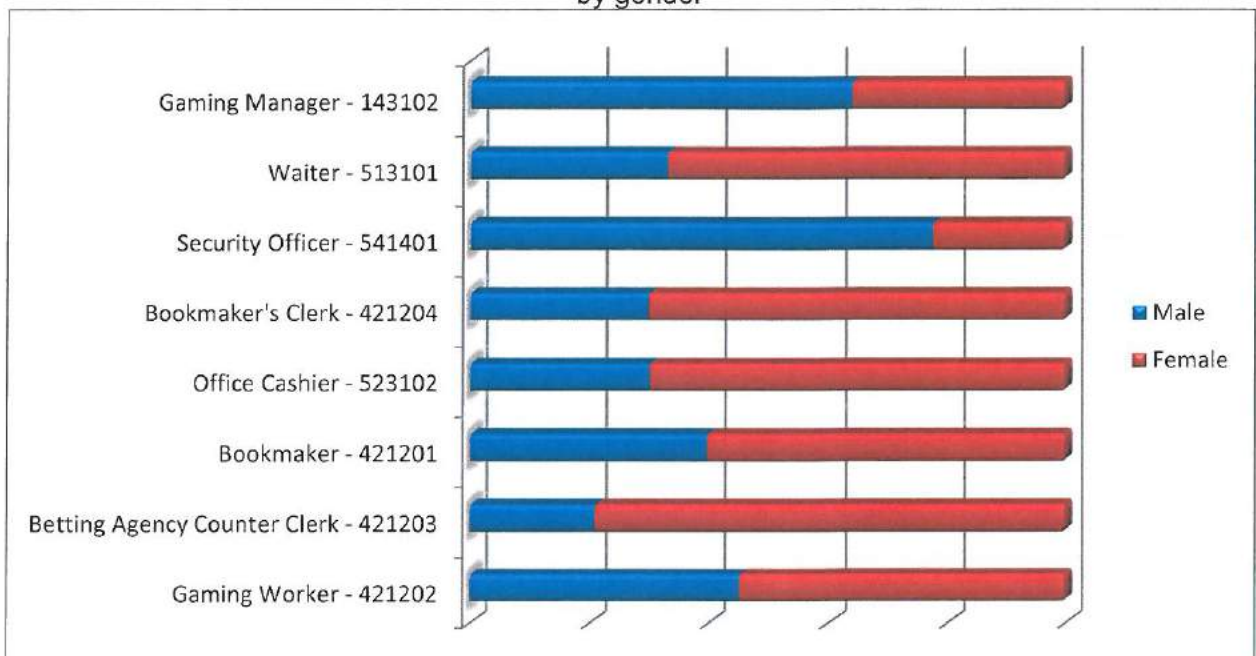
Table 16: Employees by Race, Gender, Disability and OFO Major Group for the Gaming and Lotteries sub-sector

OFO Major Group	African			Coloured			Indian			White			Grand		
	M	F	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.
Managers	552	689	1241	99	95	1	194	139	80	0	219	544	281	4	825
Professionals	345	346	691	92	71	1	163	113	76	1	189	207	174	3	381
Clerical Support Workers	3431	5923	9354	543	904	23	1447	385	404	8	789	309	383	21	692
Elementary Occupations	865	716	1581	133	73	0	206	30	3	0	33	17	7	2	24
Plant & Machine Operators & Assemblers	207	5	212	24	1	1	25	11	0	0	11	2	0	0	2
Service and Sales Workers	1210	1709	2919	104	248	0	352	54	45	0	99	68	59	1	127
Skilled Agri Forestry															
Fishery, Craft Trades	242	23	265	55	1	0	56	19	0	0	19	70	1	0	71
Tech. & Ass. Professionals	526	437	963	94	94	0	188	88	88	1	176	147	187	5	334
<b>Grand Total</b>	<b>7378</b>	<b>9848</b>	<b>17226</b>	<b>1144</b>	<b>1487</b>	<b>26</b>	<b>2631</b>	<b>839</b>	<b>696</b>	<b>10</b>	<b>1535</b>	<b>1364</b>	<b>1092</b>	<b>36</b>	<b>2456</b>
<b>Percentage</b>	<b>73%</b>			<b>11%</b>			<b>6%</b>			<b>10%</b>			<b>100%</b>		

Source: CATHSSETA SMS 2014

Table 16 indicates that there are 23848 employees in total that have been reported in the sub-sector, of these employees classified according to race, gender and OFO major group, African employees constitute 73% of the entire workforce, followed by Coloured employees at 11%, White employees at 10% and Indian employees at 6%. The majority of the sub-sector are made up of female employees, with female employees making up 55%. Employees falling into the Clerical Support workers OFO major group dominate the sub-sector with a total of 12282 employees. As expected, the second highest number of employees is seen in the Service and Sales OFO major group, making up 14% of the total number of employees in the Gaming and Lotteries sub-sector.

Figure 37: Most common occupations in the Gaming and Lotteries sub-sector per OFO major group by gender



Source: CATHSSETA SMS 2014

Figure 37 above illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered entities in the sub-sector. These sub-sectoral occupations are principally dominated by females, except that of the Security Officer occupation.

### 3.3.3 Chamber priorities and achievements

During the 2013/2014 period, the Gaming and Lotteries sub-sector prioritised the following occupations, in line with the Scarce and Critical skills for the period. The list below indicates the scarce skills addressed and the number of individuals trained.

- General Manager – A total of 5 individuals were trained through Bursaries and Management Development Programmes.
- Office or Unit Manager - A total of 16 individuals were trained through Bursaries and Learnerships.
- Jockey and Gaming Worker - A total of 16 Jockeys and 52 Gaming Workers were trained through Work Integrated Learning interventions, Bursaries and Learnerships.

### 3.4 Hospitality sub-sector

### 3.4.1 Education Profile

Table 17: Education profile of the Hospitality sub-sector

Education Levels	Employees
ABET	11942
NQF 1,2	31330
NQF 3,4,5,6	61559
NQF 7,8,9,10	5347
Total	110178

Source: CATHSSETA SMS 2014

Table 17 indicates that there are 110178 employees in total whom have been reported by CATHSSETA registered enterprises for the 2014 period. Of this figure, the majority of employees either have skills at the low level of NQF levels 1 and 2 (28%) or middle level of NQF levels 3, 4, 5 and 6 (55%). This combined majority makes up 83% of the total employees in the sub-sector and is indicative of the types of occupations which characterise the sub-sector. The vast majority of occupations form part of the Elementary Occupations OFO major group. This is also echoed by the fact that 11942 employees have ABET or AET qualifications.

Table 18: HEI Enrolments and graduates in the Hospitality sub-sector

	2012		2011		2010	
	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates
FOOD SCIENCE AND TECHNOLOGY	1 674	385	1 241	282	1442	131
HOSPITALITY ADMINISTRATION /MANAGEMENT	7 357	1 263	6 956	1 211	7611	1225
FOODS, NUTRITION AND RELATED SERVICES	1 074	202	1 432	226	1156	254
TOTAL	10 105	1 850	9 629	1 719	10 209	1 610

Source: DHET HEMIS data 2010-2012

Table 18 illustrates the total enrolments and graduates in sub-sector specific study areas from Higher Education Institutions (HEIs) from 2010 to 2012. Enrolments have decreased by 1.02% from 2010 to 2013 and persons graduating from these HEIs have increased by approximately 15%.

### 3.4.2 Occupational Profile

Table 19: Employees by Race, Gender, Disability and OFO Major Group for the Hospitality sub-sector

OFO Major Group	African			Coloured			Indian			White			Grand Total	
	M	F	D	M	F	D	M	F	D	M	F	D		Tot.
Managers	2344	3031	10	589	1101	3	353	285	2	2332	2099	6	4431	12134
Professionals	237	222	0	67	110	0	75	53	1	408	467	8	875	1639
Clerical Support Workers	1424	2446	26	364	934	6	152	303	4	274	1264	17	1538	7161
Elementary Occupations	13760	21448	132	1521	3379	15	108	79	1	173	172	2	345	40640
Plant & Machine Operators & Assemblers	1001	101	0	97	16	0	27	0	0	37	2	0	39	1281
Service and Sales Workers	11091	21179	26	951	2933	5	257	215	1	699	967	3	1666	38292
Skilled Agri Forestry														
Fishery, Craft Trades	578	134	0	116	25	0	6	4	0	82	19	0	101	964
Tech. & Ass. Professionals	2847	2418	8	446	498	0	195	160	1	714	789	5	1503	8067
<b>Grand Total</b>	<b>33282</b>	<b>50979</b>	<b>202</b>	<b>4151</b>	<b>8996</b>	<b>29</b>	<b>13147</b>	<b>1099</b>	<b>10</b>	<b>4719</b>	<b>5779</b>	<b>41</b>	<b>10498</b>	<b>110178</b>
<b>Percentage</b>	<b>76%</b>			<b>12%</b>			<b>2%</b>			<b>10%</b>			<b>100%</b>	

Source: CATHSSETA SMS 2014

Table 19 indicates that there are 110178 employees in total that have been reported in the Hospitality sub-sector, which is the largest employment of the six sub-sectors in CATHSSETA's scope. When these employees are analysed according to race, gender and OFO major group, African employees constitute 76% of the entire workforce, followed by Coloured employees at 12%, White employees at 10% and Indian employees at 2%. The majority of employees the sub-sector are made up of female employees, with female employees making up 60%. Employees falling into the Elementary Workers OFO major group dominate the sub-sector with a total of 40640 employees. The second highest number of employees is seen in the Service and Sales Workers OFO major group, with a total of 38292 employees, in the Hospitality sub-sector. Elementary Workers play a huge support role in this sub-sector, and while their work is often not seen and supports the back-of-house function in many hospitality establishments, the sub-sector would not be able to function effectively without these employees. However, due to the nature of the work carried out by these employees they are often poorly paid and work in very difficult circumstances.

Figure 38: Most common occupations in the Hospitality sub-sector per OFO major group by gender



Source: CATHSSETA SMS 2014

Figure 38 above illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered entities in the sub-sector.

### 3.4.3 Chamber priorities and achievements

During the 2013/2014 period, the Hospitality sub-sector prioritised the following occupations, in line with the Scarce and Critical skills for the period. The list below indicates the scarce skills addressed and the number of individuals trained.

- General Managers; Corporate Managers; Finance Manager; Reservations Manager; Reception Manager – A total of 84 individuals were trained through Bursaries, Work Integrated Learning and Management Development Programmes.
- Chef - A total of 103 artisans were trained through Bursaries and Learnerships.

- Office or Unit Manager; Hotel or Motel Managers; Catering Production Manager; Guest house Manager - A total of 559 individuals were trained through Work Integrated Learning interventions.

### 3.5 Travel and Tourism sub-sector

#### 3.5.1 Education Profile

Table 20: Education profile of the Travel and Tourism sub-sector

Education Levels	Employees
ABET	429
NQF 1,2	1023
NQF 3,4,5,6	15165
NQF 7,8,9,10	1635
Total	18252

Source: CATHSSETA SMS 2014

Table 20 indicates that there are 18252 employees in total whom have been reported by CATHSSETA registered entities for the 2014 period. Of this figure, the majority of employees 15165 have skills at the middle level of NQF levels 3, 4, 5 and 6. This majority makes up 83% of the total employees in the Travel and Tourism sub-sector and further supports the industry requirement of employees to have at least a Matric certificate combined with a sub-sector specific tertiary level qualification.

Table 21: HEI Enrolments and graduates in the Travel and Tourism sub-sector

	2012		2011		2010	
	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates
ENTREPRENEURIAL AND SMALL BUSINESS OPERATIONS	2 448	423	21 012	391	2098	324
BUSINESS ADMINISTRATION, MANAGEMENT AND OPERATIONS	85 462	11 393	93 553	11 098	89671	9896
<b>TOTAL</b>	<b>87 910</b>	<b>11 816</b>	<b>114 565</b>	<b>11 489</b>	<b>91 769</b>	<b>10 220</b>

Source: DHET HEMIS data 2010-2012

### 3.5.2 Occupational Profile

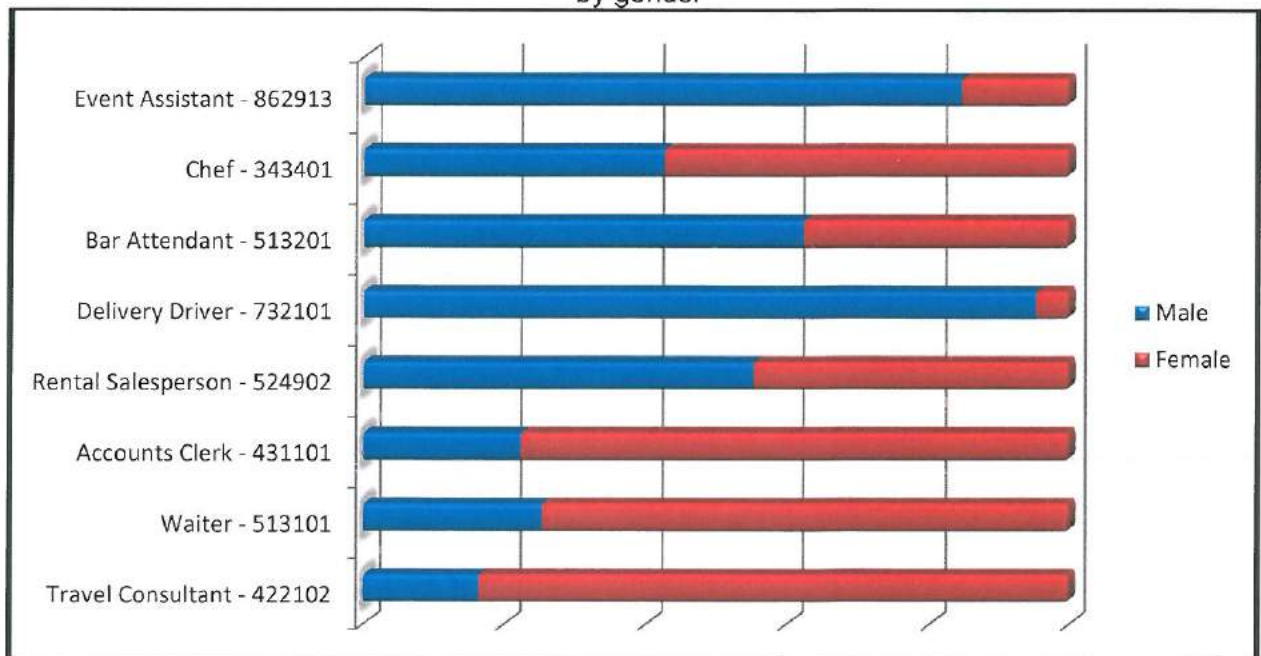
Table 22: Employees by Race, Gender, Disability and OFO Major Group for the Travel and Tourism sub-sector

OFO Major Group	African			Coloured			Indian			White			Grand Total		
	M	F	D	M	F	D	M	F	D	M	F	D		Tot.	
Managers	207	206	3	72	106	1	99	119	2	218	493	1003	9	1496	2305
Professionals	111	83	0	28	42	0	42	43	0	85	244	250	1	494	843
Clerical Support Workers	709	1786	16	183	860	4	142	449	3	591	340	1971	5	2311	6440
Elementary Occupations	744	665	2	205	104	0	9	2	0	11	16	14	0	30	1759
Plant & Machine Operators & Assemblers	799	33	5	184	5	1	49	0	0	49	19	1	0	20	1090
Service and Sales Workers	1182	1773	7	237	188	6	66	24	0	90	123	219	5	342	3812
Skilled Agri Forestry	164	7	1	11	6	0	1	0	0	1	23	0	0	23	212
Fishery, Craft Trades															
Tech. & Ass.															
Professionals	324	420	4	108	141	2	47	90	3	137	195	466	6	661	1791
<b>Grand Total</b>	<b>4240</b>	<b>4973</b>	<b>38</b>	<b>1028</b>	<b>1452</b>	<b>14</b>	<b>2480</b>	<b>727</b>	<b>8</b>	<b>1182</b>	<b>1453</b>	<b>3924</b>	<b>26</b>	<b>5377</b>	<b>18252</b>
<b>Percentage</b>	<b>50%</b>			<b>14%</b>			<b>7%</b>			<b>29%</b>			<b>100%</b>		

Source: CATHSSETA SMS 2014

Table 22 indicates that there are 18252 employees in total that have been reported in the Travel and Tourism sub-sector. When these employees are analysed according to race, gender and OFO major group, African employees constitute 50% of the entire workforce, followed by White employees at 29%, Coloured employees at 14% and Indian employees at 7%. The majority of employees the sub-sector are made up of female employees, with female employees making up 61%, which is reflective of the nature of employment in the sub-sector which has historically recruited female employees. Employees falling into the Clerical Support OFO major group dominate the sub-sector with a total of 6440 employees, which is indicative of the importance of tasks such as documentation, payments and processing that is critical to functioning and operations of many enterprises in this sub-sector. The second highest number of employees is seen in the Service and Sales Workers OFO major group, making up 21% of the total number of employees reported. Service and Sales Workers play a critical role in this sub-sector, by assisting and/or selling products to consumers, understanding how the market operates and what consumer trends are. There is an excellent opportunity to provide these market experts with sales and marketing skills to allow them to progress to sales and marketing management positions.

Figure 39: Most common occupations in the Travel and Tourism sub-sector per OFO major group by gender



Source: CATHSSETA SMS 2014

Figure 39 illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered entities in the sub-sector. The Travel Consultant, Waiter and Accounts Clerk occupations are dominated with female employees.

### 3.5.3 Chamber priorities and achievements

During the 2013/2014 period, the Travel and Tourism sub-sector prioritised the following occupations, in line with the Scarce and Critical skills for the period. The list below indicates the scarce skills addressed and the number of individuals trained.

- Director; General Manager; Programme Manager; Small Business Manager; Office Unit Manager – A total of 3 individuals were trained as Directors, 6 as General Managers, 2 as Programme Manager and 23 as Small Business Managers through Bursaries, Work Integrated Learning, Skills Programmes and Management Development Programmes.
- Accounts Clerk; Bookkeeping Clerk; General Clerk – A total of 7 individuals were trained as Accounts Clerks, 5 as Bookkeeping Clerks and 3 as General Clerks through Work Integrated Learning, Skills Programmes and Learnerships.
- Travel Consultant - A total of 20 individuals were trained through Bursaries, Work Integrated Learning and Learnerships.
- Office or Unit Manager - A total of 18 individuals were trained through Bursaries and Learnerships.

### 3.6 Sport, Recreation and Fitness sub-sector

#### 3.6.1 Education Profile

Table 23: Education profile of the Sport, Recreation and Fitness sub-sector

Education Levels	Employees
ABET	315
NQF 1,2	953
NQF 3,4,5,6	11138
NQF 7,8,9,10	931
Total	13337

Source: CATHSSETA SMS 2014

Table 23 indicates that there are 13337 employees in total whom have been reported in by CATHSSETA registered entities for the 2014 period. Of this figure, the majority of employees 11138 have skills at the middle level of NQF levels 3, 4, 5 and 6. This majority makes up 83% of the total employees in the Sport, Recreation and Fitness sub-sector and due to the fact that for many of the occupations that fall within this sub-sector, the employment requirements stipulate that at least a Matric certificate combined with a sub-sector specific tertiary level qualification are required for employment. Furthermore competition for vacancies is high in this sub-sector which often leads to the candidate with the highest qualification and most appropriate experience being hired, which further accounts for the majority of employees having middle level skills and qualifications at NQF levels 3, 4, 5 and 6.

Table 24: HEI Enrolments and graduates in the Sport, Recreation and Fitness sub-sector

Sports, Recreation and Fitness	2012		2011		2010	
	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates
PARKS, RECREATION AND LEISURE FACILITIES MANAGEMENT	3113	648	2942	596	3367	702
MOVEMENT AND MIND-BODY THERAPIES AND EDUCATION	105	26	109	20	57	7
<b>TOTAL</b>	<b>3218</b>	<b>674</b>	<b>3051</b>	<b>616</b>	<b>3424</b>	<b>709</b>

Source: DHET HEMIS data 2010-2012

Table 24 illustrates the total enrolments and graduates in sub-sector specific study areas from Higher Education Institutions from 2010 to 2012. Enrolments have decreased by 6% from 2010 to 2013 and persons graduating from these HEIs have also decreased by 5%.

### 3.6.2 Occupational Profile

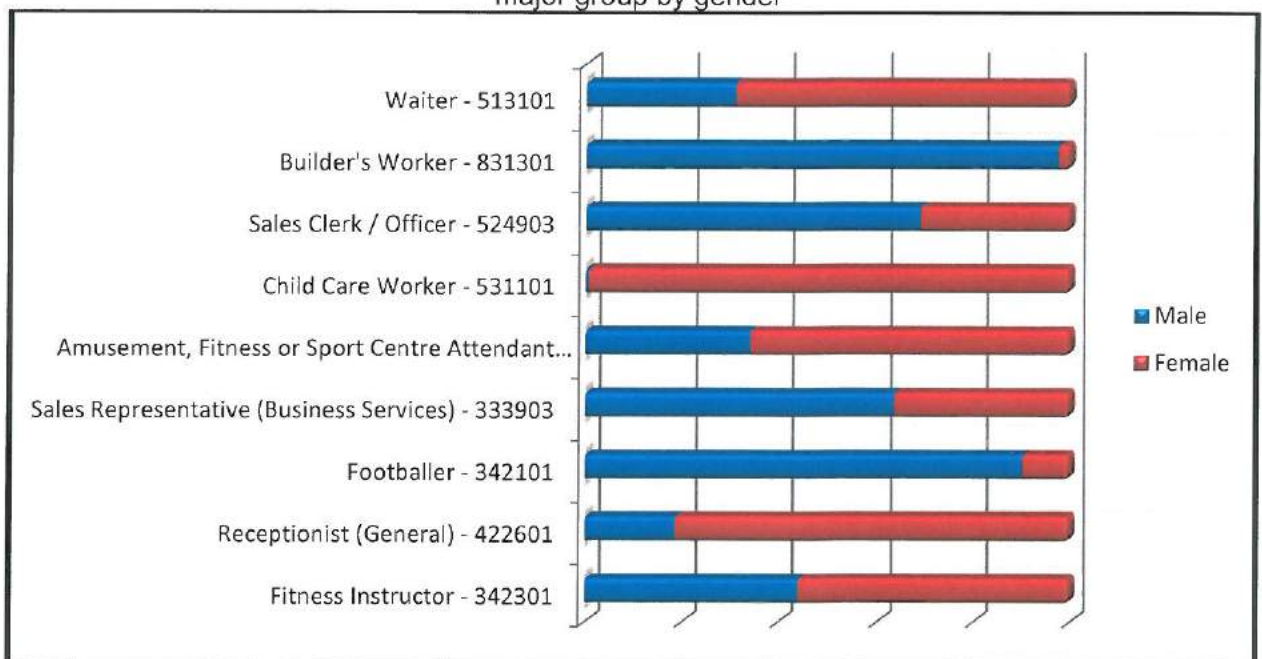
Table 25: Employees by Race, Gender, Disability and OFO Major Group for the Sport, Recreation and Fitness sub-sector

OFO Major Group	African			Coloured			Indian			White			Grand Total	
	M	F	Tot.	M	F	Tot.	M	F	Tot.	M	F	Tot.	Total	
Managers	244	157	401	119	57	176	65	27	92	423	231	1	654	1323
Professionals	51	65	116	40	39	79	9	9	18	118	93	0	211	424
Clerical Support Workers	196	693	889	72	271	343	16	51	67	68	231	1	299	1598
Elementary Occupations	696	333	1029	104	33	137	6	0	6	51	1	0	52	1224
Plant & Machine Operators & Assemblers	137	37	174	16	2	18	0	0	0	0	0	0	0	192
Service and Sales Workers	536	1178	1714	97	181	278	25	12	37	49	88	0	137	2166
Skilled Agri Forestry Fishery, Craft Trades	246	20	266	52	2	54	6	0	6	54	5	0	59	385
Tech. & Ass. Professionals	1283	681	1964	493	211	704	106	79	185	1449	1723	1	3172	6025
<b>Grand Total</b>	<b>3389</b>	<b>3164</b>	<b>6553</b>	<b>993</b>	<b>796</b>	<b>1789</b>	<b>233</b>	<b>178</b>	<b>411</b>	<b>2212</b>	<b>2372</b>	<b>3</b>	<b>4584</b>	<b>13337</b>
<b>Percentage</b>	<b>49%</b>			<b>13%</b>			<b>3%</b>			<b>35%</b>			<b>100%</b>	

Source: CATHSSETA SMS 2014

Table 25 indicates that there are 13337 employees in total that have been reported in the Sport, Recreation and Fitness sub-sector. When these employees are analysed according to race, gender and OFO major group, African employees constitute 49% of the entire workforce, followed by White employees at 35%, Coloured employees at 13% and Indian employees at 3%. The majority of employees in the sub-sector are male employees, with male employees making up 51%, which is reflective of the nature of employment in the sector whereby the sector employs slightly more males than females, but is also indicative of some of the transformation achieved in this sub-sector. Employees falling into the Technicians and Associate Professionals OFO major group dominate the sub-sector with a total of 6025 employees, which is due to the fact that the Fitness Instructor occupation falls into this major group and the sub-sector employs a significant amount of these employees. The OFO major groups Service and Sales Workers employ 2166 employees, followed by the Clerical Support Workers major group.

Figure 40: Most common occupations in the Sport, Recreation and Fitness sub-sector per OFO major group by gender



Source: CATHSSETA SMS 2014

Figure 40 illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered entities in the sub-sector.

### 3.6.3 Chamber priorities and achievements

During the 2013/2014 period, the Sport, Recreation and Fitness sub-sector prioritised the following occupations, in line with the Scarce and Critical skills for the period. The list below indicates the scarce skills addressed and the number of individuals trained.

- Sports Development Officer; Sports Coach; Fitness Instructor – A total of 360 individuals were trained through Bursaries, Work Integrated Learning, Skills Programmes and Recognition of Prior Learning (RPL) interventions.
- Sport Scientist; Biokineticist – A total of 75 individuals were trained through Bursaries and Internships.

- Caddies and Green keepers - A total of 60 individuals are currently being trained, having completed one year of a two year diploma programme.

### 3.7 ARTISANS IN THE SECTOR

Table 26: Artisans employed in the sector by Race, Gender and Disability

Trade	Black				Coloured				Indian				White				Grand Total
	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	
	Air-conditioning and Refrigeration Mechanic - 642701	16	1	0	17	6	0	0	6	0	0	0	0	7	0	0	
Aircraft Maintenance Mechanic - 653201	0	0	0	0	0	0	0	0	0	0	0	0	3	0	0	3	3
Automotive Engine Mechanic - 653109	7	0	0	7	0	0	0	0	0	0	0	0	4	0	0	4	11
Automotive Motor Mechanic - 653101	34	0	0	34	5	0	0	5	0	0	0	0	18	0	0	18	57
Boiler Maker - 651302	7	0	0	7	2	0	0	2	0	0	0	0	0	0	0	0	9
Bricklayer - 641201	16	0	0	16	1	0	0	1	1	0	0	1	0	0	0	0	18
Business Machine Mechanic - 672103	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	1
Butcher - 681103	2	0	0	2	4	1	0	5	0	0	0	0	3	0	0	3	10
Carpenter - 641502	32	0	0	32	19	0	1	19	3	0	0	3	6	0	0	6	60
Carpenter and Joiner - 641501	36	0	0	36	8	0	0	8	0	0	0	0	3	0	0	3	47
Chef - 343401	2273	1883	8	4156	260	227	0	487	135	68	2	203	434	203	1	637	5483
Computer Engineering Mechanic / Service Person - 672203	2	1	0	3	0	0	0	0	0	0	0	0	0	0	0	0	3
Confectionary Baker - 681201	49	79	0	128	8	11	0	19	3	2	0	5	8	6	0	14	166
Craft Bookbinding Technician - 662304	2	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	2
Diamond Cutter - 711203	1	0	0	1	1	0	0	1	0	0	0	0	0	0	0	0	2
Diesel Mechanic - 653306	1	0	0	1	0	0	0	0	1	0	0	1	4	0	0	4	6
Electrical Equipment Mechanic - 671206	1	0	0	1	0	0	0	0	2	0	0	2	0	0	0	0	3
Electrician - 671101	99	2	1	101	18	2	0	20	3	0	0	3	28	0	0	28	152
Electronic Equipment Mechanic - 672104	46	7	0	53	1	0	0	1	4	0	0	4	14	0	0	14	72
Electronic Pre-press Technical Worker - 662101	3	1	0	4	15	0	0	15	0	0	0	0	0	0	0	0	19
Fitter and Turner - 652302	12	0	0	12	2	0	0	2	0	0	0	0	10	0	0	10	24
Glazier - 642501	1	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1

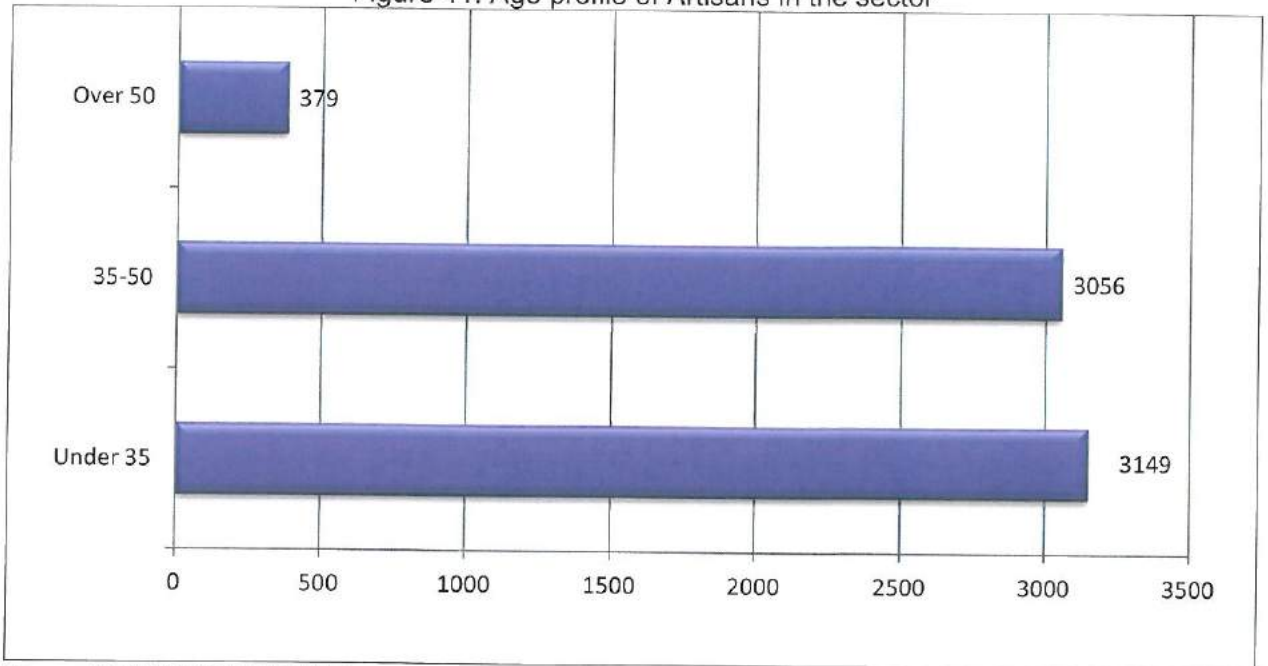


Trade	Black				Coloured				Indian				White				Grand Total
	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	
	Weapon Systems Mechanic - 671205	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	
Welder - 651202	16	0	1	16	0	0	0	0	1	0	0	1	4	0	0	4	
<b>Grand total</b>	<b>2866</b>	<b>2020</b>	<b>11</b>	<b>4886</b>	<b>407</b>	<b>250</b>	<b>1</b>	<b>657</b>	<b>167</b>	<b>70</b>	<b>2</b>	<b>237</b>	<b>592</b>	<b>212</b>	<b>1</b>	<b>804</b>	

Source: CATHSSETA SMS 2014

Table 26 illustrates that 6584 artisans are employed in the sector and that Black artisans hold 74% of the artisans in the sector, Coloured artisans 10%, Indian artisans 4% and White artisans 12%. It is interesting to note that during the implementation of NSDS I and NSDS II, CATHSSETA was exempted from the training of artisans in the sector as it was felt by the sector that it did not employ artisans. However, CATHSSETA has embraced the training of artisans as a priority of NSDS III and has worked closely with the National Artisan Moderating Body (NAMB) to revive artisan training and development in the sector. The 6584 artisans constitute 3.6% of the total employees employed in the sector. CATHSSETA through its partnership with the dti will also be investigating how it can revive artisans in the crafts sub-sector, particularly in terms of woodwork and carpentry, wire work and pottery. These are key areas in the craft sub-sector where potential exists to create employment and form SMMEs through the provision of skills development and education. CATHSSETA will work together with the dti and NAMB to unlock this potential through provision of artisan training.

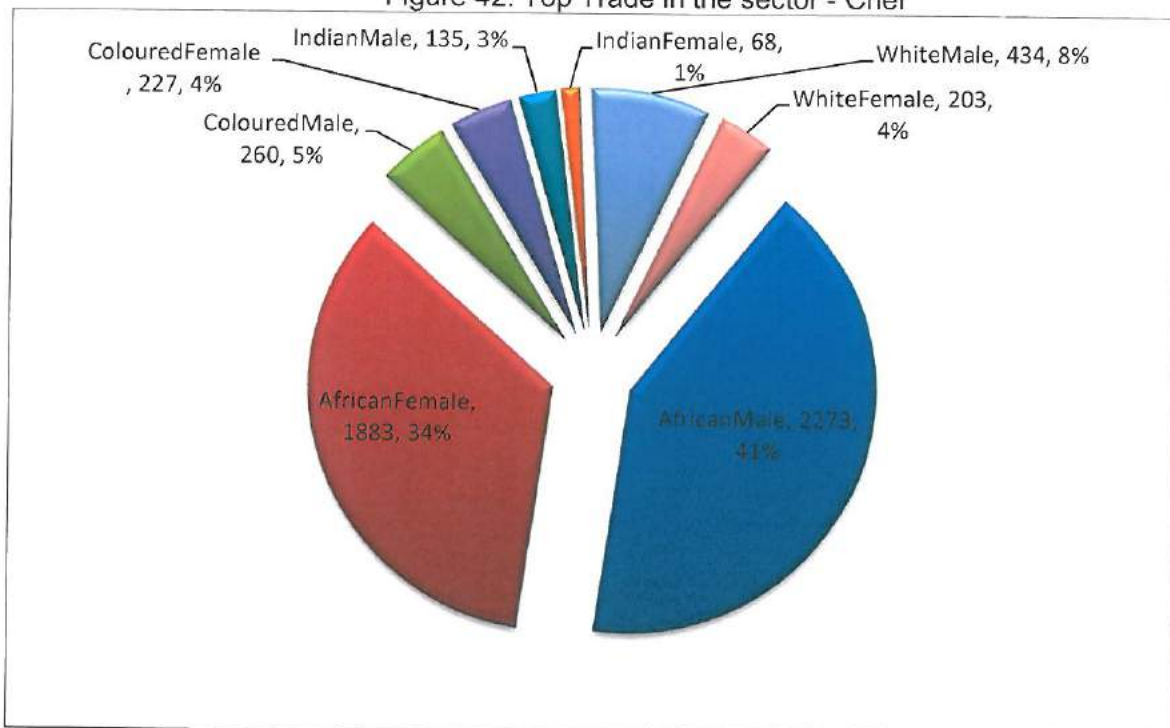
Figure 41: Age profile of Artisans in the sector



Source: CATHSSETA SMS 2014

Figure 41 indicates that 3149 (48%) artisans in the sector are youth under 35 years old, 3056 (46%) are between the ages of 35 and 55 years old and a small percentage 379 (6%) are over 55 years old.

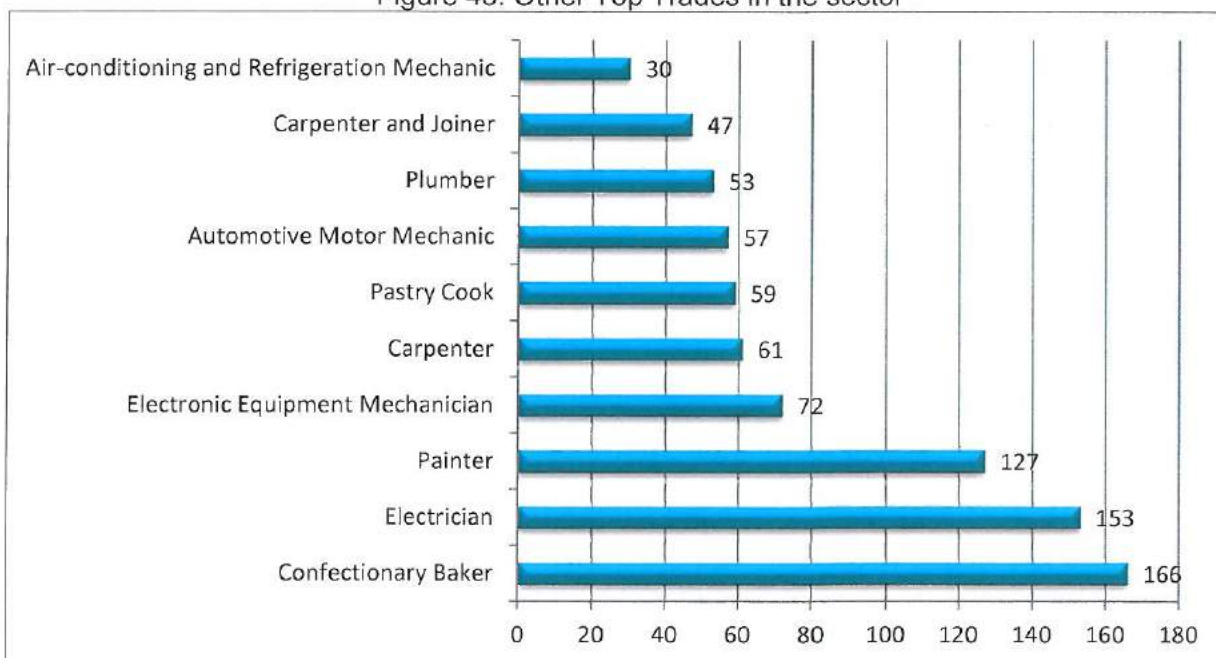
Figure 42: Top Trade in the sector - Chef



Source: CATHSSETA SMS 2014

As per Figure 42 the Chef Trade dominates the number of artisans employed in the sector with 5494 chefs employed in the sector. This equates to 83% of the 6584 artisans employed in the sector being chefs. African females make up 34% of this trade and African males 41%. Therefore, African chefs constitute 75% of this trade, this is indicative of the transformation in the sub-sector. It is interesting to note that disabled persons are not excluded from this trade and 11 disabled chefs are employed in this trade and spread across the race groups with 8 being African, 2 Indian and 1 White. These 11 disabled chefs constitute 1% of the total disabled employees employed in the sector.

Figure 43: Other Top Trades in the sector



Source: CATHSSETA SMS 2014

As per Figure 43 there are ten other trades that have significant numbers of artisans employed in the sector. These are Confectionary Baker with 166 artisans employed in the sector, Electrician with 153 artisans, Painter with 127 artisans, Electronic Equipment Mechanician with 72, Carpenter with 61 and Pastry Cook with 59. Many of these trades are employed at large resorts, game parks, horseracing courses and casinos in the sector who need these artisans to ensure their operations are able to run on a twenty four basis for seven days a week. Trades that fall under this category are Electrician, Painter, Electronic Equipment Mechanician, Carpenter and Joiner, Automotive Motor Mechanician and Carpenter. These types of trades are seen as critical and cannot be outsourced to due to their specialised skill that is often viewed as mission critical. Pastry Cook and Confectionary Baker are linked to the Chef trade and employed in the hospitality sub-sector mainly in either 5 star hotels or resorts where either due to exclusivity or need due to their isolated location need these artisans to produce pastries and confectionaries for their guests consumption. These trades are often highly prized for those artisans who are able to produce high end pastries and confectionaries as this is an extremely specialised skill requiring many years of experience.

## 3.8 Linkages and partnerships

### 3.8.1 Public Providers

The public providers in the sector are Universities, Universities of Technology (UoT) and Technical Vocational Education and Training (TVET) Colleges. These public providers are accredited and quality assured by either the Council for Higher Education and Training or Umalusi, and by CATHSSETA. There are 22 Universities and Universities of Technology across multiple campuses throughout 8 provinces, offering approximately 63 degrees and diplomas that are relevant to the sector. There are 43 TVET Colleges across 55 campuses offering the National Certificate Vocational (NCV) in Hospitality and Tourism at Levels 2, 3 and 4. Some of the TVET Colleges have also obtained programme approval from the CATHSSETA to offer the CATHSSETA accredited NQF aligned qualifications. CATHSSETA has signed a MoU with each of the TVET Colleges to offer both bursaries and Learnerships, experiential learning as well as participate in the review of the NCV Hospitality and Tourism qualifications. The quality of training provided by the public providers is generally of a high standard. However, some public providers do face facility challenges, especially some of the TVET Colleges who are not given sufficient budget to upgrade their training facilities.<sup>e</sup>

CATHSSETA has partnered with the following HEIs in the provision of post graduate, Masters and PhD bursaries in order to promote research undertaken within the sector.

- Arts, Culture and Heritage:
  - *University of the Witwatersrand*: Post graduate Diploma: Arts and Culture and Heritage Management is currently being pursued by seven learners.
  
- Conservation:
  - *Rhodes University* –The following topics are currently being researched at a masters level:
    - An investigation of the factors that constrain or enable black botany and zoology honours students in transitioning to masters studies in Eastern Cape universities
    - To investigate enabling and constraining factors affecting the supply and demand of specific biodiversity scarce skills to the biodiversity sector: Wildlife Veterinarians and Wetland Ecologists
    - Continuing teacher professional development in the environment sector: a case study of Fundisa for Change continuing teacher professional development programme
    - An investigation of the role of training in the first year of a 2.5 year incubation model to strengthen towards full participation in workplace occupations.

The following topics are currently being researched at a PhD level:

- To investigate mechanisms for up-skilling and the development of career pathways within marine conservation in South Africa
- Epistemic access to developing foundation science learning and skills in the biodiversity sector
- To understand or seeking educational frameworks and tools that enable access to green economy for marginalised youth in South Africa
- Wetland rehabilitation outcomes - service supply indicators and economic valuations
- *University of Cape Town* - The following topic is currently being researched at a PhD level:
  - Botany: The role of humans, vegetation and climate in fire regimes

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<sup>e</sup> Feedback received from both employers and faculty from public providers during various Skills Planning stakeholder workshops.

- *University of Fort Hare* - The following topic is currently being researched at a PhD level:
  - Taxonomy: Systematics and diversity of samango monkeys (*Cercopithecus albogularis*)
- *University of KwaZulu-Natal*- The following topics are currently being researched at a PhD level:
  - Zoology: The characterization of thermoregulation and physiological capabilities of a basal primate species (*Tarsius bancanus*)
- Hospitality:
  - *Stenden University*: Five learners are currently studying towards a qualification in BCom Hospitality Management over a period of 3 years.
- Sport, Recreation and Fitness:
  - *Rhodes University* –The following topics are currently being researched at a masters level:
    - Batting performance in cricket and batting -related injuries.
 The following topics are currently being researched at a PhD level:
    - The influence of soccer fatigue on the risk of high injuries in Black African Soccer players
  - *University of Johannesburg*: Masters: An analysis of the management and delivery of siyadlala Mass participation programme in Vhembe district in Limpopo Province
  - *University of KwaZulu Natal*: PhD: Transformation of sport and recreation in South Africa
  - *University of Pretoria*: The following topics are currently being researched at a masters level:
    - Sport Information centre related research-knowledge management system as a technology management tool currently in use in sport and recreation institutions in South Africa.
    - School sport academic system.
    - Challenges for sustainable talent detection, identification and development in soccer in Tshwane primary schools.
    - The significance of Sport in Youth Development through Youth Camps in Rural Communities in South Africa.
    - The effects of physical fitness and health status on academic performance in University students.
 The following topics are currently being researched at a PhD level:
    - Deconstructing the roles and expectations of change agents and lower socio-economic communities in the provision of recreation and leisure to facilitate social
  - *University of Stellenbosch*: PhD: Spinal cord Injury (SCI) Bridging the gap from patient rehab to health & wellness within a SA context
  - *University of Western Cape*: The following topics are currently being researched at a masters level:
    - An investigation of Support structures of SASCOC in Management and Development of Elite track and field Athletes in South Africa.
    - The social determinants influencing sport and recreation participation in the cape Peninsula.
    - Life skills for athletes in South Africa.
  - *Tshwane University of Technology*: PhD: A framework for children participation in sport at township schools in the city of Tshwane
- Travel and Tourism:

- *University of Zululand* - The following topics are currently being researched at a masters level:

- Tourism development and promotion
- Labour market work experience requirements for tourism in Umhlathuze Municipality
- The status of computer development in schools.

The following topics are currently being researched at a PhD level:

- Investigating existing tourism related careers and occupation pathways in the informal sector of KZN
- Professional development of Tourism Educators
- An investigation of mechanisms and processes towards integration of Work Integrated Learning (WIL) in recreation and tourism within the South African recreation and tourism industry
- Business tourism as a foundation for development opportunities in KZN.

### 3.8.2 SETA partnerships

- ETDP SETA: CATHSSETA has partnered with the ETDP SETA to ensure that 339 capacity developers within the Sport, Recreation and Fitness sub-sector are skilled as facilitators, assessors and moderators.
- AGRIS SETA: The partnership with AgriSETA is to utilise the Horticulture qualification within AGRISSETA to train Golf Course personnel within the Sport, Recreation and Fitness sub-sector. The NQF level 2 and 4 qualifications are still to be registered as a Learnership.
- Services SETA: Possible collaboration with Services SETA is currently being pursued in order to train housekeepers and cleaners within the Hospitality sub-sector.
- FASSET: The Gaming and Lotteries sub-sector intends to partner with FASSET in order to address training of the emerging occupations of Revenue Manager and Accounting and Financial manager.
- TETA: Partnership with the Transport SETA is currently being explored in order to address the training needs of the aviation sector found within the Travel and Tourism sub-sector.

### 3.8.3 Employer partnerships

The training of Chefs have been prioritised and a total of 118 learners are currently being trained in partnership with employers Divine Inspiration Trading, Ukweza Holdings, Fancourt t/a Plattner Golf, Shamwari Hospitality and North West Parks & Tourism Board.

The following table provides the employers per sub-sector that are in partnerships with CATHSSETA for the delivery of Learnerships.

Table 27: Employer partnerships

Chamber	Name of employer
Arts, Culture and Heritage	Artscape Theatre Centre, Campus of Performing Arts, Durban Playhouse Company, Free State: Department of Sport, Arts, Culture & Recreation, Free State: Office of the Premier Limpopo, Economic Development Enterprise, Lovedale FET College, Mangaung Drama & Dance Group, MZ Entertainment, South African Black Women Association, SAHRASIBIKWA Arts Centre
Conservation	Cape Town Environment Education Trust, EC: Economic Development Environment Affairs & Tourism, FS: Economic Development & Tourism, KZN Ezemvelo Wildlife {Field Rangers}, LEDET, Mpumalanga Tourism & Parks Agency, SANPARKS: Kruger

Chamber	Name of employer
	National Park, North West Parks & Tourism Board, Sondela Nature Reserve, NC: Department of Economic
Gaming & Lotteries	Emerald Casino, Flamingo Casino, Graceland Casino (Southern Highveld), Meropa Leisure & Entertainment, Mmabatho Palms Casino Hotel & Resort, National Lotteries Board, Peermont Emperors Palace, Peermont Global, Peermont KZN t/a Umfolozi, Peermont Tusk Venda t/a Khoroni, Phumelela Gaming & Leisure, Premier Hotel Regent, Sun International, West Coast Leisure t/a Mykonos Casino
Hospitality	Ayidlimuntu Trading Enterprises CC, Cape Flats Youth, Cape Town Fish Market Fancisor, Chicken Nandos, City Lodge Hotels, CITY OF JOBURG, Coastland Convention Centre, Dr. Kenneth Kaunda Resources & Support, Dr. Kenneth Kaunda Resources & Support, Fairmont Zimbali Lodge, Fancourt t/a Plattner Golf, Fedics, Gauteng Tourism Association, Griekwastad Civil Society Organisation, Hilton International, LSG Sky Chefs, Mandela Rhodes Place Management Company, Premier Hotel Berlin, Radisson Blue, Shishangeni Private Lodge, Tsogo, Ukweza Holdings
Sports, Recreation and Fitness	Sport & Recreation SA, Virgin Active, Amandla Edu Football, Athletic SA, Dr. Kenneth Kaunda Resources & Support, SABGA, Western Province Rugby
Travel & Tourism	BCD Travel, Carlson Wagonlit Travel, CITY OF JOBURG, Concorde Travel Carlson Wagonlit Travel, EuropCar, NAFCO, Rannies Travel, Rannies Travel, South African Airways City Centre (Pty) Ltd, Thebe Events Management, Thompson Travel, Tourism Enterprise Project, Tourvest Destination Management, Tourvest Travel Services

#### 3.8.4 Public entities (including government departments)

*Arts, Culture and Heritage:* The chamber has entered into partnerships with the Free State office of the Premier to train 66 unemployed learners on the National Certificate in Live Technical Productions, FETC Heritage practice and FETC Arts and Culture Administration qualifications. The Limpopo Department of Economic Enterprise for the training of 18 employees in End user computing, the North West Department of Sports, Arts and Culture to train 50 employees in FETC: Heritage Resource Management, Mpumalanga department of Sports, Arts and Culture and Limpopo Department of Sport, Arts and Culture to train employees in the Management Development Programme.

*Conservation:* The chamber has entered into partnerships with Ezemvelo KZN Wildlife to provide 15 unemployed learners with experiential learning towards the National Diploma in Nature Conservation, the Free State Department of Economic, Tourism and Environmental Affairs to train 25 unemployed learners on the National Certificate in Natural Resource Management, the Free State Department of Economic, Tourism and Environmental Affairs to train 20 employees in National Certificate: Conservation Resource Guardianship and the Northern Cape Department of Nature Conservation to assist 21 unemployed learners on the National Certificate in Conservation Resource Guardianship.

*Sports, Recreation & Fitness:* The chamber has entered into partnerships with Sports and Recreation South Africa to provide 50 employed learners with training towards a qualification in Sports Administration, the Free State Department of Sports, Arts & Culture to train 15 learners towards a qualification in Sports Administration, SASCOC to train 339 employees in Facilitator, Assessor and Moderator courses and the University of the Free State to assist 20 learners on the Management Development Programme.

*Travel & Tourism and Hospitality:* These chambers currently have partnerships with the National Department of Tourism, the Western Cape Department of Economic Development and Tourism, the Eastern Cape Department of Economic Development, Environmental Affairs and Tourism and the Gauteng Tourism Authority. The service level agreements between CATHSSETA and these entities are currently in the process of review.

## 4. SCARCE AND CRITICAL SKILLS

### SCARCE SKILLS

Refer to those occupations where there is a scarcity of qualified and experienced people, currently or anticipated in the future, either because:

- (a) such skilled people are not available (**absolute scarcity**); or
- (b) they are available but do not meet employment criteria (**relative scarcity**).

This scarcity can arise from one or a combination of the following, grouped as relative or absolute:

**Absolute scarcity:** suitably skilled people are not available, for example:

- A new or emerging occupation, i.e. there are few, if any, people in the country with the requisite skills (qualification and experience) and education and training providers have yet to develop learning programmes to meet the skills requirements.
- Firms, sectors and even the country are unable to implement planned growth strategies and are experiencing productivity, service delivery and quality problems directly attributable to a lack of skilled people.
- Replacement demand would reflect an absolute scarcity where there are no people enrolled or engaged in the process of acquiring the skills that need to be replaced.

**Relative scarcity:** suitably skilled people are available but do not meet other employment criteria, for example:

- Geographical location, i.e. people are unwilling to work outside of urban areas.
- Equity considerations, i.e. there are few if any candidates with the requisite skills (qualifications and experience) from specific groups available to meet the skills requirements of firms and enterprises.
- Replacement demand would reflect a relative scarcity if there are people in education and training (formal and work-place) who are in the process of acquiring the necessary skills (qualification and experience) but where the lead time will mean that they are not available in the short term to meet replacement demand.

### CRITICAL SKILLS

Critical Skills will refer to specific key or generic and “top up” skills within an occupation.

In the South African context there are two groups of critical skills:

- **Key or generic skills**, including (in SAQA-NQF terminology) critical cross-field outcomes. These would include cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, ICT skills and working in teams.
- **Particular occupationally specific “top-up” skills** required for performance within that occupation to fill a “skills gap” that might have arisen as a result of changing technology or new forms of work organisation.

A shortage of skills and talent is not a uniquely South African problem. Globally there is a shortage of skilled employees. The World Economic Forum acknowledges that the current talent gap is a challenge for employers globally and to sustain economic growth, by 2030 the United States will need to add more than 25 million workers and Europe 45 million workers.<sup>29</sup> If South Africa wishes to remain competitive globally it will need to address the skills shortages in all economic sectors. By effectively

addressing the skills shortages in the sector, the potential to increase both the volume of foreign tourists and the direct spend by these tourists can be realised throughout the value chain of the sector. Critical skills such as customer service and tourism product development are key to unlocking this potential as they will allow South Africa to be competitive in the global market.

To both monitor and determine the scarce and critical skills in the sector, CATHSSETA utilises a combination of data and labour market signals. Some of the data and signals used and observed are:

- (a) all enterprises submitting Mandatory Grant applications (which comprise of the Planned training interventions and Reported training) completed a section on scarce and critical skills in their sub-sectors
- (b) the number of vacancies and difficult to fill positions in the sector
- (c) the pool of unemployed skilled people

To supplement the scarce and critical skills data and signals above, consultations were also held with stakeholders in the sector and feedback from these stakeholders has been extremely useful, especially in terms of validating the scarce and critical skills findings and including scarce and critical skills needs from SMMEs whose data is not currently captured by Planned Training and Reporting template of the Mandatory Grant application.

#### 4.1 Summary of 2013/2014 Scarce skills

The following table 28 provides a summary 2013/2014 scarce skills and how these were addressed in terms of numbers:

Table 28: Summary 2013/2014 Scarce skills

OCC. CODE	OCCUPATIONAL GROUP	SPECIALISATION	ACHIEVEMENT
121101	MANAGERS	Director (Enterprise/Organisation)	5
121901	MANAGERS	General Manager	15
121905	MANAGERS	Programme or Project Manager	5
134903	MANAGERS	Small Business Manager	23
134903	MANAGERS	Office or Unit Manager	32
143104	MANAGERS	Arts / Culture Manager	25
141201	MANAGERS	Café (Licensed) or Restaurant Manager	559
141101	MANAGERS	Hotel or Motel Managers	
141102	MANAGERS	Guest House Manager	
265203	PROFESSIONALS	Musician (Instrumental)	30
265103	PROFESSIONALS	Sculptor	10
262101	PROFESSIONALS	Archivist	0
213301	PROFESSIONALS	Conservation Officer	599
213307	PROFESSIONALS	Park Ranger	
213302	PROFESSIONALS	Environmental Scientist	20
213105	PROFESSIONALS	Biotechnologist	
213106	PROFESSIONALS	Botanist	

OCC. CODE	OCCUPATIONAL GROUP	SPECIALISATION	ACHIEVEMENT
213109	PROFESSIONALS	Zoologist	
335906	TECHNICIANS AND ASSOCIATE PROFESSIONALS	Environmental Practices Inspector	16
343401	TECHNICIANS AND ASSOCIATE PROFESSIONALS	Chef	103
342301	TECHNICIANS AND ASSOCIATE PROFESSIONALS	Fitness Instructor	360
342204	TECHNICIANS AND ASSOCIATE PROFESSIONALS	Sports Coach or Instructor	
342201	TECHNICIANS AND ASSOCIATE PROFESSIONALS	Sports Development Officer	
342103	TECHNICIANS AND ASSOCIATE PROFESSIONALS	Jockey (Skill Level 3)	57
421202	CLERICAL SUPPORT WORKERS	Gaming Worker	52
422102	CLERICAL SUPPORT WORKERS	Travel Consultant	20
411101	CLERICAL SUPPORT WORKERS	General Clerk	5
431101	CLERICAL SUPPORT WORKERS	Accounts Clerk	10
431101	CLERICAL SUPPORT WORKERS	Bookkeeping Clerk	5
511301	SERVICE AND SALES WORKERS	Gallery or Museum Guide	10
611303	SKILLED AGRICULTURAL, FORESTRY, FISHERY, CRAFT and RELATED TRADES WORKERS	Green Keeper (Skill Level 3)	60
862925	ELEMENTARY OCCUPATIONS	Caddie	

## 4.2 Summary of 2014/2015 Scarce skills

The following table illustrates the Top ten 2014 Scarce skills and reflect how these are being addressed in the current period.

Table 29: 2014/2015 Top 10 Scarce skills

<i>Occupation</i>	<i>Intervention(s) planned by CATHSSETA</i>	<i>NQF Level</i>	<i>Target</i>
Hotel or Motel Manager	NC Hospitality Management	6	120
Café (Licensed) or Restaurant Manager	Bursaries	6	80
Sports Centre / Facility Manager	NC Facility Management NQF L 5	5	18
Small Business Manager	NC Hospitality Management	4-5	128

<i>Occupation</i>	<i>Intervention(s) planned by CATHSSETA</i>	<i>NQF Level</i>	<i>Target</i>
Park Ranger	National Diploma: Nature Conservation NC: Nature Conservation Guardianship FETC: Nature Conservation Natural Resource Management	2-5	200
Conservation Scientist	Bachelor of Science (Zoology, Environmental Health, Environmental Sciences)	8-10	5
Sound Technician	NC & FETC: Music Industry: Sound Technology	4-5	30
Chef	NC: Professional Cookery	4	104
Sports Official	FETC Technical Officiating NQF L 4	4	208
Cook	Skills Programme	2-3	100
Environmental Manager (SIPs)	Workplace Learning	-	30
Handyperson (SIPs)	Workplace Learning	-	10
Truckdriver (SIPs)	Workplace Learning	-	10
Programme or Project Administrators Assistants (SIPs)	Workplace Learning	-	10

### 4.3 2015/2016 PIVOTAL Skills

Table 30 below provides the list of PIVOTAL (Scarce and Critical) skills identified for the entire sector. The Scarce skills refer to occupations in which there is a scarcity of qualified and experienced people, current or anticipated, either because such skilled people are not available or they are available but do not meet the employment criteria.

Table 30: 2015/2016 PIVOTAL (Scarce and Critical) Skills List

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
MANAGERS	112101	Director (Enterprise / Organisation)	Alternative Director; Chief Executive Officer (CEO); Company Director; Deemed (Shadow) Director; Executive Director; Independent Non-executive Director; Managing Director; Managing Director (Enterprise / Organisation); Non-executive Director; Senior / Lead Independent Non-executive Director	Funding of Business Administration Bursary; Funding of Generic Management Learnership	6-8	Y	145	25
MANAGERS	121905	Programme or Project Manager	Project Director	Funding of Business Administration Bursary; Funding of Generic Management Learnership	6-8	Y	67	10
MANAGERS	121906	Franchise Manager	NA	Management development programme; bursaries for management qualifications	6-8	Y	6	2
MANAGERS	122102	Sales Manager	Sales Director; Sales Executive	Management development programme; bursaries for management qualifications	6-8	Y	9	5
MANAGERS	132404	Warehouse Manager	Coolstore / Packhouse / Stockroom / Storeroom Manager; Storage and Warehousing Manager	Management development programme; bursaries for management qualifications	6-8	Y	4	1
MANAGERS	134206	Sport Science Manager	NA	Funding for Bursaries and Research Grants at Higher Education institutions offering sport science degrees; employed bursaries and internship	8	Y	6	2

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
MANAGERS	134901	Environmental Manager	Agriculture and Forestry Coordinator; Centralised Permits and Cites Manager; Conservation Agriculture System Manager; Conservation Science Manager; Contaminated Sites Manager; Environmental Education Manager; Land and Water Manager; Land Care Manager; Pollution and Waste Manager; Species Protection Manager; Wild Life Management Services Manager; Wild Life Protection Services Manager	Bursaries and Research Grants, internship and workplace experience (SIPS)	8-10	Y	30	30
MANAGERS	134903	Small Business Manager	Entrepreneurial Business Manager; Owner Manager	Funding of Business Administration Bursary; Funding of Generic Management Learnership	4-5	Y	342	30
MANAGERS	134904	Office Manager	Centre Manager	Funding of Business Administration Bursary; Funding of Generic Management Learnership	6-8	Y	124	10
MANAGERS	134909	Museum Manager	Curatorial Services Manager; operations manager	Bursaries (certificate in collection management/BHCS (Heritage and Cultural Tourism/Diploma in Heritage and Museum Studies	5-8	Y	10	10
MANAGERS	141101	Hotel Manager	Backpackers Manager; Boarding House Manager; Duty Manager (Hotel); Hostel Manager; Hotelier; Innkeeper; Lodge Manager; Resort Manager	Funding of bursaries towards the study of Management Development Programme (10) and Hospitality Management Diploma/ Degree(10)	6	Y	45	20
MANAGERS	141102	Guest House Manager	Bed and Breakfast Operator	Management development programme; bursaries for management qualifications	6-8	Y	10	2
MANAGERS	141103	Reception Manager	NA	Funding of Business Administration Bursary; Funding of Generic Management Learnership	4-5	Y	15	2

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
MANAGERS	141201	Café (Licensed) or Restaurant Manager	Bistro Manager; Cafeteria Manager; Canteen Manager; Caterer; Catering Manager; Food and Beverage Manager; Food Services Manager; Internet Cafe Manager	Bursaries	6	Y	271	65
MANAGERS	141203	Catering Production Manager	Food and Beverage Coordinator	Management development programme; Cook Convenience Skills Programme	6	Y	454	100
MANAGERS	141204	Reservations Manager	Central Reservations Manager; Rooms Division Manager, Front Office Manager	Management development programme; bursaries for management qualifications	6-8	Y	15	2
MANAGERS	143101	Betting Agency Manager	Racing Betting Branch Manager; Tab Manager	Management development programme; bursaries for management qualifications	6-8	Y	14	5
MANAGERS	143102	Gaming Manager	Cashier Manager Gaming; Gaming Administration Manager; Gaming Project Manager; Gaming Promotions Manager; Race Track Operations Manager; Slots Manager; Slots Technical Manager; Tables Manager	Gaming and Management Learnership	4-5	Y	11	3
MANAGERS	143103	Cinema or Theatre Manager	Theatre/cinema Operations manager;	Bursaries and Learnerships (Management Development Programme/ Generic management qualification/Masters degree in History of Art or Fine Art	8	Y	40	40
MANAGERS	143107	Fitness Centre Manager	Fitness Centre Administrator; Gym Manager; Health Club Manager; Sports Club Manager	Bursaries, Skills Programmes and Learnerships	5	Y	28	15
MANAGERS	143108	Sports Centre / Facility Manager	Aquatic Centre Manager; Golf Course Manager; Gymnasium Manager; Indoor Sports Centre Manager (Squash, Tennis, Ten Pin Bowling etc.); Leisure Centre	Funding for the development of qualification; Funding of facilities management project (40)	5	Y	326	40

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
			Manager; Riding School Manager; Sport Stadium Manager					
MANAGERS	143109	Club Membership Manager	Membership Relations Manager	Management development programme; bursaries for management qualifications	6-8	Y	10	2
MANAGERS	143901	Facilities Manager	Campus Administrator / Supervisor; Facilities Supervisor; Garden / Park Manager	Funding of bursaries, skills programme	5	Y	15	5
MANAGERS	143909	Travel Agency Manager	NA	Management development programme; bursaries for management qualifications; National Certificate Management	4	Y	13	13
PROFESSIONALS	213101	Animal Behaviourist	NA	Bursaries , internship and workplace experience	8-10	Y	60	2
PROFESSIONALS	213102	Biologist (General)	Life Scientist (General); Phytotomist	Bachelor of Science with Physiology as a specialisation)	8-10	Y	9	2
PROFESSIONALS	213106	Botanist	Mycologist; Plant Environmental Biologist; Plant Morphologist; Plant Taxonomist	Bursaries, internships (Bachelor of Science with Botany as a specialisation)	8-10	Y	19	2
PROFESSIONALS	213107	Marine Biologist	Aquatic Biologist; Fisheries Analyst; Fisheries Biologist; Fisheries Researcher; Fisheries Scientist	BSc Oceanography, National Diploma: Nature Conservation, National Diploma: Maritime Studies. (Bursaries and Internships)	7-9	Y	24	2
PROFESSIONALS	213301	Conservation Scientist	Animal Ecologist; Conservancy Advisory Scientist; Conservation Officer; Ecological Researcher; Ecologist; Fish and Games Officer; Fisheries Advisor; Forestry Conservationist; Soil Conservationist; Species Protection Officer; Water Conservation Scientist	Funding for Bursaries and Research Grants at Higher Education institutions offering environment/biodiversity and conservation degrees; employed bursaries (16), unemployed bursaries (40), internship and workplace experience (25)	8-10	Y	987	81

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
PROFESSIONALS	213302	Environmental Scientist	Climate Change Analyst; Environmental Advisor; Environmental Auditor; Environmental Consultant; Environmental Officer; Environmental Research Scientist; Environmental Waste Officer; Environmentalist	BTech: Environmental Science (Bursaries, WIL and Internships)	8-10	Y	49	2
PROFESSIONALS	213307	Park Ranger	Beach and Estuary Warden; Fish Warden; Game / Park Warden; Wildlife Conservationist; Wildlife Officer / Warden	Funding for National Certificate: Nature Conservation Guardianship (NQF Level 2), FETC Nature Conservation - Natural Resource Management (Terrestrial) (NQF Level 4), and National Certificate: Nature Conservation - Natural Resource Management (Terrestrial) (NQF Level 5) and funding for various CATHSETA Skills Programmes; Employed Learnerships (125), employed skills programme (88), unemployed Learnerships (83) and unemployed skills programme (83).	2, 5-8	Y	51	379
PROFESSIONALS	226905	Biokineticist	Exercise Physiologist; Exercise Therapist; Human Movement Specialist	Bursaries and internship	6-8	Y	11	5
PROFESSIONALS	243204	Event Producer	Concert Promoter / Organiser; Conference and Event Organiser / Coordinator; Event Coordinator; Event Director; Event Manager Specialist; Festival Coordinator; Government, Protocol or Civic Event Organiser; Meeting Planner; Professional Conference Organiser; Social / Life Cycle Organiser; Sports Event Organiser; Wedding Coordinator	Learnerships; Skills Programmes & Bursaries (ND in Event Planning; Higher Certificate: Film, Television and Entertainment Production	4-6	Y	17	17

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
PROFESSIONALS	262102	Gallery or Museum Curator	Curatorial Services Manager; Exhibitions Technician; Museum Registrar	Bursaries & Internships (Masters degree in History of Art or Fine Art/ Honours Degree in curatorship)	5-8	Y	113	113
PROFESSIONALS	264102	Book or Script Editor	Dramaturge Script Coordinator	Learnerships skills programmes Bursaries (Certificate in script writing course/BAFT & MA Degree)	6	Y	7	7
PROFESSIONALS	265101	Painter (Visual Arts)	Air Brush Artist; Art Enameller; Art Restorer Paintings; Caricaturist; Cartoonist; Mosaicist; Muralist; Painter (Artistic); Photo Colourer; Picture Restorer; Portrait Painter	Bursaries, Learnerships & Internships (FETC in visual arts/BA in Fine Art (game & graphic design)/ National Diploma in Fine Art/ BA Hon in Arts History & Visual Culture/ Higher Certificate in Art & Design/Masters in Fine Art (Illustration)	4-8	Y	54	54
PROFESSIONALS	265202	Music Director	Band Leader; Choral Director; Music Conductor; Orchestra Conductor	Bursaries & Learnerships (NC music section leadership; National Diploma in music education)	4-6	Y	138	138
PROFESSIONALS	265203	Musician (Instrumental)	Accompanist; Bandsman; Drummer; Guitarist; Instrumentalist; Percussionist; Pianist / Violinist	Learnerships; skills programmes and bursaries (NC in Music Industry Sound Technology/ Certificate in Music industry practice/ FETC & NC in music)	4-6	Y	78	15
PROFESSIONALS	265301	Dancer or Choreographer [Critical Skill]	Ballet Dancer; Contemporary or Modern Dancer; Striptease Artist	Bursaries; skills programmes & Learnerships (BA in Arts & Culture (dance))/ FETC in performing arts/ B Mus (dance)	4-7	Y	62	62
PROFESSIONALS	265401	Director (Film, Television, Radio or Stage)	Location Director; Motion Picture Director; Studio Director; Theatre Director; Theatrical Director	National Diploma, Bachelor's Degree in Technology, Master's Degree in Technology, Doctorate in Technology	5-10	Y	31	31
TECHNICIANS AND ASSOCIATE PROFESSIONALS	314102	Environmental Science Technician	Conservation Scientific Officer; Ecological Technical Officer; Environmental Technical	National Diploma: Environmental Science (Bursaries, WIL and Internships)	8-10	Y	11	5

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
			Officer; Naturalist; Parks and Reserves Technical Officer					
TECHNICIANS AND ASSOCIATE PROFESSIONALS	333201	Events Manager	Conference and Event Organizer; Conference Planner; Destination Manager; Event Planner; Exhibition Director; Exhibition Organiser; Function Planner; Functions Manager; Government Protocol or Civic Event Organiser; Marketing Campaign Organiser; Social/Life Cycle Coordinator; Trade Fair Manager; Wedding Planner	National Certificate in Tourism: Event Support; Management development programme; bursaries for management qualifications; National Certificate Management	5	Y	17	17
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342103	Jockey (Skill Level 3)	Steeplechase Jockey	Jockey and National Certificate in Thoroughbred Horse Raising Learnership; National Certificate in Equine Studies/Equine Practices Learnership	4	Y	15	15
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342201	Sports Development Officer	NA	Learnership; skills programmes	4	Y	218	218
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342203	Sports Official	Dog or Horse Racing Official; Handicapper (Racing); Racecourse Official; Racecourse Starter; Racecourse Steward; Racecourse Timekeeper; Stipendiary Steward; Timekeeper	Funding of Sports Technical Officiating Learnership project (43)	4	Y	246	43

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342204	Sports Coach or Instructor [Critical Skill]	Athletic Coach; Basketball Coach; Callisthenics Instructor; Cricket Coach; Dive Master; Diving Coach; Diving Instructor (Open Water) Dressage Instructor; Equine Tutor / Riding Instructor; Football Coach; Gymnastics Coach or Instructor; Martial Arts Instructor; Polo Coach; Rhythmic Gymnastics Coach; Scuba Instructor; Show Jumping Instructor; Skiing Instructor; Snorkelling Instructor; Snowboarding Instructor; Snowsport Instructor; Squash Coach; Surface Supply Breathing Apparatus (SSBA) Instructor; Swimming Coach or Instructor; Tennis Coach; Water Polo Coach	RPL and Skills Programmes	4	Y	52	52
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342301	Fitness Instructor	Aerobics Instructor; Aquarobics Instructor; Fitness Centre Worker; Fitness Consultant / Trainer / Instructor; Gym Instructor / Trainer; Gymnasium Attendant; Health and Fitness Instructor; Personal Trainer; Physical Activity Coordinator; Physical Education Officer; Physical Fitness Trainer; Physical Training Instructor	Learnerships and Skills Programmes	5	Y	116	116
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342302	Outdoor Adventure Guide	Adventure Safari Guide; Adventure Tourism Operator; Bungee Jump Master; Cycle Touring Guides; Diving Operator; Dolphin Swimming Guide; Fishing Guide; Horse Riding Instructor; Horse Trekking Guides; Hiking Guide; Hunting Guide; Kayaking Guide; Mountain Guide; Outdoor Adventure Leader; Outdoor Adventure Instructor; Outdoor Recreation Guide; River Kayaking Guide; River Rafting Guide; Sea Kayaking Guide; Shark Swimming	Adventure Site guide Skills Programme	4	Y	16	16

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
			Guide; Snorkelling Guide; Team Building Operator; Trekking Guide; White-water Rafting Guide					
TECHNICIANS AND ASSOCIATE PROFESSIONALS	343301	Gallery or Museum technician	Taxidermist	Bursaries & Internships (National Diploma in Museum technology/	5-8	Y	13	13
TECHNICIANS AND ASSOCIATE PROFESSIONALS	343401	Chef	Chef De Partie; Commis Chef; Demi Chef; Executive Chef; Head Chef; Pastry Chef; Saucier; Second Chef; Sous Chef	Funding of Professional Cookery Learnership project; Assistant chef skills programmes	2-4	Y	296	204
TECHNICIANS AND ASSOCIATE PROFESSIONALS	343902	Light Technician	Lighting Assistant; Lighting Director; Lighting Electrician; Lighting Operator; Lighting Technician	Learnerships; skills programmes and bursaries (N.Dip: Entertainment Technology/ NC Live event and Technical Productions/ diploma in Stage Management/ N.Dip: Electrical Engineering)	4-6	Y	15	15
TECHNICIANS AND ASSOCIATE PROFESSIONALS	352103	Sound Technician	Audio Operator; Audio Technician; Dubbing Machine Operator; Dubbing Projectionist (Sound Mixing); Re-recording Mixer; Sound Editor / Mixer / Recordist / Operator / Specialist; Sound Effects Person; Video and Sound Recorder	Learnerships; WIL & Bursaries (NC & FETC Music industry sound technology/BSc in sound engineering and technology/HC & Diploma in sound technology & production/ Diploma in sound engineering NC Live event and Technical Productions Learnership (30); Funding of Event Producer/ Live Event Technical Production Level 5 qualification development	4-5	Y	18	30
CLERICAL SUPPORT WORKERS	421202	Gaming Worker	Casino / Gaming Dealer; Casino Gaming Inspector; Casino Surveillance Operator; Croupier; Gaming Inspector; Gaming Operator; Gaming Pit Boss; Gaming Table Operator	Gaming Learnership; Casino Cashier, Casino Dealer, Casino Slots Operator, Casino Surveillance Operator skills programmes	3	Y	124	35

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
CLERICAL SUPPORT WORKERS	421203	Betting Agency Counter Clerk	Betting Operator; Tab Clerk; Tab Operator / Teller / Worker; Totalisator Agency Board Worker	Learnerships	4	Y	55	12
CLERICAL SUPPORT WORKERS	422101	Tourist Information Officer	Tourist Advisor; Travel Reception Clerk	Skills Programme	3-5	Y	17	5
CLERICAL SUPPORT WORKERS	422102	Travel Consultant	Booking Travel Clerk; Domestic Travel Consultant; Inbound Tour Manager; International Travel Consultant; Travel Agent; Travel Agent Representative; Travel Arrangements Manager; Travel Clerk; Travel Consolidator; Travel Officer; Travel Reservation Clerk; Travel Wholesaler	National Certificate in General Travel Learnership	5	Y	177	90
CLERICAL SUPPORT WORKERS	422201	Inbound Contact Centre Consultant	Inbound Call Centre Customer Service Representative; Inbound Contact Centre Team Leader	National Certificate in General Travel Learnership	5	Y	13	10
CLERICAL SUPPORT WORKERS	422401	Hotel Receptionist	NA	Learnerships , Skills Programmes, Internships and Work Integrated Learning	3	Y	37	25
CLERICAL SUPPORT WORKERS	422601	Receptionist (General)	Front Desk Coordinator; Front Desk Support Officer; Tenancy Officer	Skills Programme	4-5	Y	28	10
CLERICAL SUPPORT WORKERS	431101	Accounts Clerk	Account Coordinator / Controller; Accounting Clerk; Accounts Payable or Receivable Clerk; Assets Clerk / Coordinator; Audit Clerk; Billing Administrator / Representative / Officer; Creditors Clerk; Debtors Clerk; Ledger Clerk; Settlement Clerk / Officer	Internship, Skills Programmes and Work Integrated Learning	4	Y	76	25

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
CLERICAL SUPPORT WORKERS	441903	Program or Project Administrators	Administration Officer; Administrator; Assistant Secretary of The Cabinet; Consents Officer / Clerk; Course Coordinator; Programme / Project Coordinator; Project Advisor / Leader; Project Controller; Project Coordinator; Project Corrections Operations Advisor / Coordinator; Project Planner; Project Programme Specialist; Senior Officer; Strategic Support Officer; Support Officer	Workplace (SIPS)	4-6	Y	16	10
SERVICE AND SALES WORKERS	512101	Cook	NA	Funding of Cook Convenience skills programme and the Assistant Chef skills programme	2-3	Y	55	55
SERVICE AND SALES WORKERS	513101	Waiter	Dining Room Attendant; Drink Waiter; Food and Beverage Attendant; Formal Service Waiter; Lounge Assistant; Maitre D; Night Club Hostess; Restaurant Hostess; Silver Service Waiter; Sommelier; Wine Attendant; Wine Steward	Learnerships , Skills Programmes, Internships and Work Integrated Learning	3	Y	63	52
SERVICE AND SALES WORKERS	513201	Bar Attendant	Bar Hostess / Maid Bar Operator; Bar Steward; Barperson Waiter; Bartender; Club Steward	Bar attendant skills programme	2	Y	26	26
SERVICE AND SALES WORKERS	513202	Barista	Coffee Maker	Skills Programme	2-4	Y	12	12
SERVICE AND SALES WORKERS	515101	Hotel Service Manager	Accommodation Manager; Bar Manager; Commissionaire Porter; Front Office Manager (Hotel); Head / Front Office Porter (Hotel); Head Housekeeper; Hotel Chief Steward; Hotel Concierge; Hotel Office Manager	Learnership	4-5	Y	32	15

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
SERVICE AND SALES WORKERS	515102	Housekeeping Service Manager	Boarding School Hostel Matron; Camp Hostel Matron; Dormitory Manager; Prison Matron; Residential Institution Housekeeping Matron	National Certificate in Accommodation Services	2	Y	5	3
SERVICE AND SALES WORKERS	516401	Animal Attendant/ Groomer	Animal Rescue Worker; Boarding Kennel Attendant; Horse Groomer; Kennel Assistant; Pet Groomer; Pound Keeper; Shearer; SPCA Worker	Bursaries, internship and workplace experience	5-6	Y	320	5
SERVICE AND SALES WORKERS	516403	Zookeeper	Aquarist; Zoo Attendant	BSc Zoology and National Diploma: Nature Conservation	7	Y	52	10
SERVICE AND SALES WORKERS	524601	Food Service Counter Attendant	Cafeteria Counter Attendant; Salad Bar Attendant	Food Service assistant skills programme	2	Y	10	5
SKILLED AGRICULTURAL, FORESTRY, FISHERY, CRAFT AND RELATED TRADES WORKERS	611303	Green Keeper	Golf Course Superintendent; Grounds Maintainer; Groundskeeper; Turf Curator; Turf Keeper; Turf Manager	Learnership on Horticulture/turfgrass ; Skills programme	2,4	Y	35	10
SKILLED AGRICULTURAL, FORESTRY, FISHERY, CRAFT AND RELATED TRADES WORKERS	681103	Butcher	Biltong Maker; Processed Meat Maker; Sausage Maker; Smallgoods Maker; Sosati Maker	Skills Programme	2-4	Y	6	2

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
SKILLED AGRICULTURAL, FORESTRY, FISHERY, CRAFT AND RELATED TRADES WORKERS	681201	Confectionary Baker	Cake / Bread Baker; Dough Maker	Skills Programme	2-4	Y	20	5
PLANT AND MACHINE OPERATORS AND ASSEMBLERS	732101	Delivery Driver	Armoured Car Driver; Driver-messenger; Fast Food Delivery Driver; Grocery Deliverer; Light Utility Vehicle (LUV) Driver; Meals On Wheels Driver; Taxi Truck Driver; Van Driver	Skills Programme	2-3	Y	32	10
PLANT AND MACHINE OPERATORS AND ASSEMBLERS	732201	Chauffeur	Hire Car Driver; Limousine Driver; Shuttle Driver	Skills Programme	3-7	Y	15	5
PLANT AND MACHINE OPERATORS AND ASSEMBLERS	733102	Charter and Tour Bus Driver	Tour Coach Operator	Skills Programme	3-6	Y	5	1
PLANT AND MACHINE OPERATORS AND ASSEMBLERS	733201	Truck Driver (General)	Cement Mixer Driver; Compactor Driver (Rubbish Collection); Dumper Truck Driver; Freight Operator; Livestock Hauler; Logging Truck Driver; Lorry Driver; Road Train Driver; Tilt Tray Driver	Workplace (SIPS)	4	Y	10	10
ELEMENTARY OCCUPATIONS	811201	Commercial Cleaner	Building Exterior / Interior Cleaner; Cleaner (Non-domestic); Factory Cleaner / Sweeper; Hotel / Motel Cleaner; Office Cleaner; School Cleaner; Waterblaster; Workshop Cleaner	Skills Programme	2	Y	20	20

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NOF LEVEL	NOF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
ELEMENTARY OCCUPATIONS	821203	Game Farm Worker / Assistant	NA	Bursaries, internship and workplace experience	5-6	Y	75	2
ELEMENTARY OCCUPATIONS	841101	Fast Food Cook	Burger Maker; Chicken / Fish Fryer; Chips Maker; Fast Food Assistant; Grill Cook; Pizza Maker; Short Order Cook; Spasa Shop Cook; Takeaway Cook	AET and Skills Programmes	2	Y	54	54
ELEMENTARY OCCUPATIONS	841201	Kitchenhand	Dishwasher; Kitchen Assistant (Non-domestic); Kitchen Steward; Pantry Attendant; Sandwich / Salad Preparer	Kitchen cleaner skills programme	2	Y	97	25
ELEMENTARY OCCUPATIONS	841202	Food Trade Assistant	Bakery Assistant; Butcher's Assistant; Chef's Assistant; Confectioner's Assistant; Cook's Assistant; Pastry Cook's Assistant	Food Service assistant skills programme	2	Y	25	5
ELEMENTARY OCCUPATIONS	862202	Handyperson	Handy Man; Handy Person; Hotel Useful; Hotel Yardperson	Workplace (SIPS)	2-3	Y	10	10

Table 31: CATHSETA Top 10 PIVOTAL Skills List 2015/2016

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
MANAGERS	134901	Environmental Manager	Agriculture and Forestry Coordinator; Centralised Permits and Cites Manager; Conservation Agriculture System Manager; Conservation Science Manager; Contaminated Sites Manager; Environmental Education Manager; Land and Water Manager; Land Care Manager; Pollution and Waste Manager; Species Protection Manager; Wild Life Management Services Manager; Wild Life Protection Services Manager	Bursaries and Research Grants, internship and workplace experience (SIPS)	8-10	Y	30	30
MANAGERS	134903	Small Business Manager	Entrepreneurial Business Manager; Owner Manager	Funding of Business Administration Bursary (15); Funding of Generic Management Learnership (15)	4-5	Y	342	30
PROFESSIONALS	213302	Environmental Scientist	Climate Change Analyst; Environmental Advisor; Environmental Auditor; Environmental Consultant; Environmental Officer; Environmental Research Scientist; Environmental Waste Officer; Environmentalist	BTech: Environmental Science (Bursaries, WIL and Internships)	8-10	Y	49	2
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342201	Sports Development Officer	NA	Learnership; skills programmes	4	Y	218	218
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342301	Fitness Instructor	Aerobics Instructor; Aquarobics Instructor; Fitness Centre Worker; Fitness Consultant / Trainer / Instructor; Gym Instructor / Trainer; Gymnasium Attendant; Health and Fitness Instructor; Personal Trainer; Physical Activity Coordinator; Physical Education Officer; Physical Fitness Trainer; Physical Training Instructor	Learnerships and Skills Programmes	5	Y	116	116

OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	NQF ALIGNED Y/N	QUANTITY NEEDED	Quantity to be supported by SETA
TECHNICIANS AND ASSOCIATE PROFESSIONALS	343301	Gallery or Museum technician	Taxidermist	Bursaries & Internships (National Diploma in Museum technology/	5-8	Y	13	13
TECHNICIANS AND ASSOCIATE PROFESSIONALS	343401	Chef	Chef De Partie; Commis Chef; Demi Chef; Executive Chef; Head Chef; Pastry Chef; Saucier; Second Chef; Sous Chef	Funding of Professional Cookery Learnership project (204)	4	Y	296	204
TECHNICIANS AND ASSOCIATE PROFESSIONALS	352103	Sound Technician	Audio Operator; Audio Technician; Dubbing Machine Operator; Dubbing Projectionist (Sound Mixing); Re-recording Mixer; Sound Editor / Mixer / Recordist / Operator / Specialist; Sound Effects Person; Video and Sound Recorder	Learnerships; WIL & Bursaries (NC & FETC Music industry sound technology/BSc in sound engineering and technology/HC & Diploma in sound technology & production/ Diploma in sound engineering NC Live event and Technical Productions Learnership (30); Funding of Event Producer/ Live Event Technical Production Level 5 qualification development	4-5	Y	18	30
CLERICAL SUPPORT WORKERS	421202	Gaming Worker	Casino / Gaming Dealer; Casino Gaming Inspector; Casino Surveillance Operator; Croupier; Gaming Inspector; Gaming Operator; Gaming Pit Boss; Gaming Table Operator	Learnerships	3	Y	79	35
CLERICAL SUPPORT WORKERS	422102	Travel Consultant	Booking Travel Clerk; Domestic Travel Consultant; Inbound Tour Manager; International Travel Consultant; Travel Agent; Travel Agent Representative; Travel Arrangements Manager; Travel Clerk; Travel Consolidator; Travel Officer; Travel Reservation Clerk; Travel Wholesaler	Learnerships, Internships and Work Integrated Learning	5	Y	177	90

## 5. Strategic Plan

### 5.1 Strategic Outcomes and Goals

All CATHSSETA targets takes into consideration the following developmental and transformation imperatives this is applied during various project plans.

No	Development and Transformation imperatives	Target Description	Allocation
1	Age	Youth – under 35years old	60%
2	Disability	All forms of disabilities	1%
3	Gender	Female	65%
4	Race	Black	85%
5	HIV/AIDS	HIV/AIDS awareness and prevention component to be included in most of training programme	100%
6	Geography	Rural and Informal settlements	45%
7	Class	Income – Less than R60k per annum (as per SARS)	55%

The table below then reflects the six CATHSSETA strategic goals and further unpacks them in terms of a broader description of the goal, the programmatic focus of the goal and the linkages of the goal to the National Outcomes, NSDS III Goals and the obligations of the CATHSSETA Service Level Agreement with DHET.

CATHSSETA STRATEGIC GOAL	GOAL STATEMENT (Description)	CATHSSETA PROGRAMMATIC FOCUS OF THE GOAL
1. <b>Demand led sector skills development programmes informed by sector research and intelligence.</b>	<p>To position CATHSSETA as a credible and authoritative voice on skills demand and on interventions and solutions that are required to address skills needs within the sector.</p> <p>To build CATHSSETAs understanding of labour market issues in the sector and to document and communicate recent and emerging trends, as well as to develop solid baseline indicators for the sector so as to inform planning and guide decision making on</p>	<ul style="list-style-type: none"> <li>▪ <b>Sound sector knowledge informing sectoral strategy and plans.</b></li> <li>▪ <b>Support the sector through conducted research to addressing skilling needs - Needs in relation to skills development are researched, documented and communicated.</b></li> <li>▪ <b>Scarce and critical skills are escalated to Chamber Strategies, which are sub-sector specific and form the basis from which discretionary grant projects are developed and implemented.</b></li> <li>▪ <b>Qualifications identified to address sector needs and sources of education and training supply identified.</b></li> <li>▪ <b>Enhanced data, information and knowledge management systems – Collection, Compilation, Storage, Analysis, Reporting – CREDIBILITY requires VERIFICATION.</b></li> </ul>

CATHSSETA STRATEGIC GOAL	GOAL STATEMENT (Description)	CATHSSETA PROGRAMMATIC FOCUS OF THE GOAL
	investment in education and training provision.	<ul style="list-style-type: none"> <li>▪ Establish MoU's to fund and capacitate research projects by Masters, PhD and post-doctoral students.</li> </ul>
	<p><b>SUPPORTING NATIONAL OUTCOME 5; and SECTORAL SUPPORT TO OUTCOMES 4, 10, 12b.</b></p> <p><b>SUPPORTING NSDS III GOAL 1:</b> Establishing a credible institutional mechanism for skills planning.</p>	
	<p><b>SUPPORTING SLA OBLIGATION:</b></p> <p><b>Strategic Driver 1:</b> Assessment of skills required for each sector and the identification of scarce skills.</p> <p><b>Strategic Driver 5:</b> Scarce and critical skills needed in the sector, how it will be addressed, the number of learners that will be trained and placed as well as the companies that will be involved.</p>	
<p>2. <b>Informed, empowered and actively engaged CATHSSETA stakeholders increase the capacity and capability of the SETA to meet sectoral skills needs.</b></p>	<p>Effective stakeholder management and partnering initiatives between the SETA, employers, private providers, government, other SETAs and sectoral bodies and relevant institutions are resulting in increased capacity to meet industry skills needs throughout the country.</p>	<ul style="list-style-type: none"> <li>▪ <b>Interacting and partnering with stakeholders to address sector needs.</b></li> <li>▪ <b>Oversight and coordination of effective Chamber structures.</b></li> <li>▪ <b>Strategic partnerships with other SETAs and Government Entities to monitor and evaluate all learning interventions within the scope of the CATHSSETA.</b></li> <li>▪ <b>Enhance the experience of stakeholders and customers interacting with CATHSSETA.</b></li> <li>▪ <b>Effectively communicate and promote the work and programmes of CATHSSETA.</b></li> </ul>
	<p><b>SUPPORTING NATIONAL OUTCOME 5; and SECTORAL SUPPORT TO OUTCOMES 4, 10, 12b.</b></p> <p><b>SUPPORTING NSDS III GOALS:</b> Stakeholder engagement and partnership in support of all 8 NSDS III goals.</p>	
	<p><b>SUPPORTING SLA OBLIGATION:</b></p> <p><b>Strategic Driver 3:</b> Partnerships between CATHSSETA and Public TVET Colleges.</p> <p><b>Strategic Driver 6:</b> Number of agreements signed with Public TVET Colleges, Universities and other Training Providers as well as the amount approved for each agreement which should also reflect the number of learners to be trained, types of training programmes and the programmes that are in place for the current financial year.</p> <p><b>Strategic Driver 8:</b> Placement of students in industry as part of the agreement between CATHSSETA and companies.</p> <p><b>Strategic Driver 12:</b> Presence of CATHSSETA in rural areas and townships, and how and by when will it be implemented.</p>	

CATHSSETA STRATEGIC GOAL	GOAL STATEMENT (Description)	CATHSSETA PROGRAMMATIC FOCUS OF THE GOAL
<p>3. Employers participating in the Mandatory Grant process provide quality information regarding the training of employed workers.</p>	<p>Assess the quality and consistency of plans and reports received so as to enhance the effectiveness of the mandatory grant processing, payment and reporting process.</p>	<ul style="list-style-type: none"> <li>▪ <b>Capacitating employers for an increase in the quality of labour market information submitted, received and analysed through the Mandatory Grant process.</b></li> <li>▪ <b>Evaluate and verify to ensure plans and reports meet CATHSSETA requirements.</b></li> <li>▪ <b>Effective management of the Mandatory Grant process.</b></li> </ul>
<p><b>SUPPORTING NATIONAL OUTCOME 5.</b>  <b>SUPPORTING NSDS III GOAL 5:</b> Encouraging better use of workplace-based skills development.</p>		
<p><b>SUPPORTING SLA OBLIGATION:</b>  <b>Strategic Driver 5:</b> Scarce and critical skills needed in the sector, how it will be addressed, the number of learners that will be trained and placed as well as the companies that will be involved.  <b>Strategic Driver 9:</b> Placement of students in industry as part of the agreement between CATHSSETA and companies.</p>		
<p>4. Appropriately targeted programmes and funding that address current and emerging skills requirements and improved learner employability.</p>	<p>To ensure the effective management of four-party agreements resulting in the disbursement of Discretionary Grants for learning interventions and PIVOTAL programmes, with a specific focus on SMMEs, Cooperatives and Rural development.</p>	<ul style="list-style-type: none"> <li>▪ <b>PIVOTAL Programme Implementation.</b></li> <li>▪ <b>Discretionary Grant disbursements to be managed effectively and informed by the critical and scarce needs of the industry.</b></li> <li>▪ <b>Quality career guidance and learner support programmes implemented.</b></li> <li>▪ <b>Effective contract and four party management.</b></li> <li>▪ <b>Effective Skills Development Facilitators support.</b></li> <li>▪ <b>Effective management of Inter-SETA transfers.</b></li> <li>▪ <b>Use Skills Development as a tool to advance and transform the small business sector (SMME's, NGO's and Cooperatives).</b></li> </ul>
<p><b>SUPPORTING NATIONAL OUTCOME 5; and SECTORAL SUPPORT TO OUTCOMES 4, 10, 12b.</b>  <b>SUPPORTING NSDS III GOALS:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Goal 2: Increasing access to occupationally-directed programmes.</b></li> <li>▪ <b>Goal 3: Promoting the growth of a public TVET college system that is responsive to sector, local, regional and national skills needs and priorities.</b></li> <li>▪ <b>Goal 4: Addressing the low level of youth and adult language and numeracy skills to enable additional training.</b></li> </ul>		

CATHSSETA STRATEGIC GOAL	GOAL STATEMENT (Description)	CATHSSETA PROGRAMMATIC FOCUS OF THE GOAL
	<ul style="list-style-type: none"> <li>▪ <b>Goal 6: Encouraging and supporting cooperatives, small enterprises, worker initiated, NGO and community training initiatives.</b></li> <li>▪ <b>Goal 7: Increasing public sector capacity for improved service delivery and supporting the building of a developmental state.</b></li> <li>▪ <b>Goal 8: Building career and vocational guidance.</b></li> </ul> <p><b>SUPPORTING SLA OBLIGATION:</b></p> <p><b>Strategic Driver 2:</b> Improving and addressing the levels of education in the sector.</p> <p><b>Strategic Driver 3:</b> Partnerships between CATHSSETA and Public TVET Colleges.</p> <p><b>Strategic Driver 4:</b> The number of bursaries awarded/to be awarded to deserving SA citizens in critical skills at the 23 Universities and 50 TVET colleges.</p> <p><b>Strategic Driver 5:</b> Scarce and critical skills needed in the sector, how it will be addressed, the number of learners that will be trained and placed as well as the companies that will be involved.</p> <p><b>Strategic Driver 8:</b> Placement of students in industry as part of the agreement between CATHSSETA and companies.</p> <p><b>Strategic Driver 9:</b> A comprehensive plan on making the public service a training space should be developed, with targets per annum to change the lives of the youth.</p> <p><b>Strategic Driver 10:</b> Rural Development Programmes and how it will be implemented.</p> <p><b>Strategic Driver 11:</b> Progress in the implementation of Recognition of Prior Learning.</p> <p><b>Strategic Driver 13:</b> Number of Public TVET Colleges and University students placed in companies to obtain work experience.</p> <p><b>Strategic Driver 14:</b> Facilitating the exposure and placement of TVET College lecturers to industry.</p>	
<p>5. <b>CATHSSETA programmes and interventions are continuously assessed and enhanced in terms of their relevance, quality and effectiveness</b></p>	<p>Stakeholder confidence in the SETA is enhanced through effective full value-chain analysis and evaluation of the quality and soundness of the implementation of learning interventions, and transparent benchmarking with applicable norms and standards.</p>	<ul style="list-style-type: none"> <li>▪ <b>Education and Training Quality Assurance provided to qualifications under CATHSSETA scope to both public and private training providers.</b></li> <li>▪ <b>Monitoring and Evaluation strengthens the contract management capabilities of CATHSSETA.</b></li> <li>▪ <b>Full-value chain monitoring and evaluation informs the continuous enhancement of CATHSSETA programmes and interventions.</b></li> </ul> <p><b>SUPPORTING NATIONAL OUTCOME 5.</b></p> <p><b>SUPPORTING NSDS III GOALS:</b></p> <p><b>Goal 1:</b> Establishing a credible institutional mechanism for skills planning.</p>

CATHSSETA STRATEGIC GOAL	GOAL STATEMENT (Description)	CATHSSETA PROGRAMMATIC FOCUS OF THE GOAL
	<p><b>Goal 7:</b> Increasing public sector capacity for improved service delivery and supporting the building of a developmental state.</p>	
	<p><b>SUPPORTING SLA OBLIGATION:</b></p> <p><b>Strategic Driver 7:</b> Targets as reflected in the Strategic Plan and Annual Performance Plan must be credible and linked to a “Baseline”.</p>	
<p>6. <b>An accountable, well governed and optimally resourced organisation.</b></p>	<p>To promote public accountability and achieve high standards of corporate governance and efficient resource utilisation so as to ensure optimal organizational performance and service delivery.</p>	<ul style="list-style-type: none"> <li>▪ <b>Financial management, control and reporting and master budget management.</b></li> <li>▪ <b>A transparent, cost effective and efficient supply chain management and procurement system.</b></li> <li>▪ <b>Adherence to policies and legislative frameworks and compliance with relevant statutory requirements.</b></li> <li>▪ <b>Governance, risk management and compliance.</b></li> <li>▪ <b>Accountability and reporting.</b></li> <li>▪ <b>Internal business excellence and system and process optimisation.</b></li> <li>▪ <b>Effective knowledge management systems and institutional memory.</b></li> <li>▪ <b>An optimally capacitated and capable organisation.</b></li> <li>▪ <b>A high performance culture underpinned by an effective performance management and development system and approach.</b></li> </ul>
	<p><b>SUPPORTING NATIONAL OUTCOME 5; and Outcome 12:</b> Good Governance and an Effective Public Service.</p> <p><b>SUPPORTING NSDS III GOALS:</b> Governance and corporate services in support of all 8 NSDS III goals.</p>	
	<p><b>SUPPORTING SLA OBLIGATION:</b> Governance and corporate services in support of all obligations of the Service Level Agreement.</p>	

In turn, the six strategic goals have been unpacked into Strategic Objectives which define the key result areas or elements which constitute that strategic goal. The focus is on ensuring that the specified goals are therefore specific and measurable; and implementation programmes can be delivered and reported upon.

## 5.2 Strategic Objectives

The CATHSSETA tactical scorecard reflects a continued focus on the alignment and integration of the business of CATHSSETA with its mandate, vision, mission and values. The organisation's planning architecture, as well as the execution and reporting cycle are progressing towards maturity and through leveraging the synergistic relationship between mandatory grant and discretionary grant focused services, the CATHSSETA will progress towards becoming a centre of excellence that services effectively the needs of all its stakeholders.

The ongoing strengthening of the management team and the utilisation of flagship projects to enhance the impact and visibility of the organisation is a key short and medium-term intervention that has already started to yield value. It is anticipated that within the period of this Strategic Plan, the CATHSSETA service offerings, human capital, organisational culture as well as processes and systems will place the organisation in a position to perform fully on its mandate, thus supporting its continued relevance and sustainability.

The following table reflects the tactical framework of CATHSSETA for the period to 2019/20 and sketches the strategic objectives (Outputs or Key Performance Areas) and reflects the performance metrics and 5-year targets for each strategic goal and programmatic focus area. These will be further unpacked into indicators, milestones, baselines and annual and quarterly targets in the aligned CATHSSETA Annual Performance Plans for 2015/16 and beyond.

NSDSIII GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET - INFORMING PERFORMANCE METRICS IN APP
<b>GOAL 1:</b> Establishing a credible institutional mechanism for skills planning.	<b>SSP Programme 1:</b> Research and Skills Planning. <b>SSP Programme 2:</b> Address Sector	1. Demand led sector skills development programmes informed by sector	<ul style="list-style-type: none"> <li>▪ Sound sector knowledge informing sectoral strategy and plans.</li> <li>▪ Support the sector through conducted research to addressing</li> </ul>	1.1 A sound institutional framework for Sector Skills Planning and aligned CATHSSETA Strategic and Annual Performance Planning.	<ul style="list-style-type: none"> <li>▪ Annually updated SSP that drives the strategy for the sector, and is a culmination of evidenced based chamber and sub-sector strategies.</li> </ul>

NSDSIII GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET - INFORMING PERFORMANCE METRICS IN APP
	<p>Middle Level Skills.</p> <p><b>SSP Programme 3:</b> Development of Artisans.</p> <p><b>SSP Programme 5:</b> Address Sector High Levels Skills.</p> <p><b>SSP Programme 6:</b> Research, Development and Generation of New Knowledge.</p> <p><b>SSP Programme 7:</b> NCV &amp; N-Courses Review and FET Capacity Building.</p>	<p>research and intelligence.</p>	<p>skilling needs - Needs in relation to skills development are researched, documented and communicated.</p> <ul style="list-style-type: none"> <li>▪ Scarce and critical skills are escalated to Chamber Strategies, which are sub-sector specific and form the basis from which discretionary grant projects are developed and implemented.</li> <li>▪ Qualifications identified to address sector needs and sources of education and training supply identified.</li> <li>▪ Enhanced data, information and knowledge management systems – Collection, Compilation, Storage, Analysis, Reporting –</li> </ul>	<p>1.2 Appropriate sectoral plans and strategies responding to identifies high, middle and low level scarce skills.</p> <p>1.3 Promotion of Sector driven Research and</p>	<ul style="list-style-type: none"> <li>▪ An APP that identifies aligned programmes, targets and budget for CATHSSETA support to the chambers as reflected in the SSP.</li> <li>▪ Mandatory grant application inform scarce and critical skills.</li> <li>▪ Sub-sector strategies and programmes informed by scarce and critical skills research.</li> <li>▪ CATHSSETA Artisan Training Strategy developed according to NAMB Artisan Policy.</li> <li>▪ CATHSSETA Rural Development Strategy implemented.</li> </ul> <p>Research Papers published and uploaded on the</p>

NSDSIII GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET - INFORMING PERFORMANCE METRICS IN APP
	<p><b>SSP Programme 8:</b> Quality Assurance.</p> <p><b>SSP Programme 10:</b> Skills Development for Low Level Literacy and Numeracy.</p> <p><b>SSP Programme 12:</b> Cooperatives Skills Development.</p> <p><b>SSP Programme 13:</b> Skills Development Support for Small and Emerging Businesses.</p> <p><b>SSP Programme 14:</b> Trade Unions, NGOs and</p>		<p><b>CREDIBILITY requires VERIFICATION.</b></p> <ul style="list-style-type: none"> <li>Establish MoU's to fund and capacitate research projects by Masters, PhD and post-doctoral students.</li> </ul>	<p>cited research publications.</p> <p>1.4 Relevant courses and qualifications that provide a sound foundational basis for building targeted labour market skills.</p> <p>1.5 Enhanced information and knowledge management systems - integrated with other departments.</p>	<p>CATHSSETA research portal.</p> <ul style="list-style-type: none"> <li>Career paths researched and developed.</li> <li>Career and vocational guidance to employees and prospective learners.</li> <li>Updated CATHSSETA qualifications under the QCTO process.</li> <li>NCV and N - Courses and curriculum revised to ensure that they provide a sound foundational basis for building labour market relevant skills.</li> <li>Auditable and verifiable learner records.</li> <li>Reliable and credible data to identify and address sector needs</li> </ul>

NSDSIII GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET - INFORMING PERFORMANCE METRICS IN APP
	CBOs Skills Development Support.				captured on CATHSSETA databases.

The Strategic Objectives and indicative 5-Year Targets have then informed the resource considerations, CATHHSETA budget and MTEF projections outlined in the aligned CATHSSETA 2015/16 Annual Performance Plan.

BUDGETS PER PROGRAMME	2013/2014	2014/2015	2015/2016	2016/2017	2017/18
<b>Programme 1: Research and Skills Planning</b>					
Administration Expenses	831 123	148 741	309 678	102 485	100 140
Salaries and staff related costs	863 205	1 131 300	1 076 068	1 442 960	1 513 967
Direct Salary Expenses	681 968	657 305	705 151	559 546	598 714
Direct Project Expenses	20 214 747	15 136 398	15 175 034	17 159 024	17 853 651
Committed Surplus Funds Expenses	4 312 875				
<b>Total</b>	<b>26 903 919</b>	<b>17 073 744</b>	<b>17 265 930</b>	<b>19 264 014</b>	<b>19 264 014</b>
<b>Programme 2 : Address Sector Middle Level Skills</b>					
Administration Expenses	1 462 118	2 006 342	1 749 395	3 044 989	2 752 312
Salaries and staff related costs	2 864 112	3 383 931	3 509 136	3 518 423	3 764 713
Direct Salary Expenses	454 886	513 576	470 349	417 398	446 616
Direct Project Expenses	52 901 949	67 232 151	70 250 825	76 473 403	79 899 411
Committed Surplus Funds Expenses	51 636 404				
<b>Total</b>	<b>109 319 468</b>	<b>73 136 000</b>	<b>75 979 706</b>	<b>83 454 212</b>	<b>86 863 052</b>
<b>Programme 3: Artisan Development</b>					
Administration Expenses	101 698	243 915	101 739	194 106	193 665
Salaries and staff related costs	193 842	612 952	363 855	368 909	394 732
Direct Salary Expenses	118 347	310 936	122 370	110 596	118 338
Direct Project Expenses	3 526 652	10 256 198	5 619 962	6 833 255	7 139 384
Committed Surplus Funds Expenses	1 067 500				
<b>Total</b>	<b>5 008 040</b>	<b>11 424 001</b>	<b>6 207 926</b>	<b>7 506 866</b>	<b>7 846 119</b>
<b>Programme 4: Marketing, Communication and Stakeholder Relations Management</b>					
Administration Expenses	179 742	133 363	211 573	211 658	227 957
Salaries and staff related costs	0	0	0	0	0
Direct Salary Expenses	0	0	0	0	0
Direct Project Expenses	2 216 820	1 644 806	2 609 401	2 610 453	2 812 763

BUDGETS PER PROGRAMME	2013/2014	2014/2015	2015/2016	2016/2017	2017/18
Total	2 396 562	1 778 168	2 820 974	2 822 111	3 040 720
<b>Programme 5 : Addressing High Level Scarce Skills</b>					
Administration Expenses	546 515	355 398	254 559	316 111	310 878
Salaries and staff related costs	536 948	812 131	887 293	813 328	870 262
Direct Salary Expenses	400 242	529 537	413 847	382 224	408 980
Direct Project Expenses	12 962 463	13 870 935	13 670 062	13 547 369	14 154 291
Total	14 446 168	15 568 000	15 225 761	15 059 033	15 744 410
<b>Programme 6 : Research , Development and Generation of New Knowledge</b>					
Administration Expenses	412 025	505 656	330 435	485 563	498 452
Salaries and staff related costs	311 694	338 544	572 373	358 910	384 034
Direct Salary Expenses	157 924	177 372	163 293	150 938	161 504
Direct Project Expenses	8 767 950	10 234 428	10 971 342	10 264 236	10 724 074
Total	9 649 593	11 256 000	12 037 444	11 259 648	11 768 064
<b>Programme 7 : FET Capacity Building &amp; NCV and N-Course review</b>					
Administration Expenses	193 172	1 089 720	1 124 373	1 082 518	1 168 498
Salaries and staff related costs	223 148	216 817	237 830	397 862	425 712
Direct Salary Expenses	118 348	113 910	122 370	140 790	150 646
Direct Project Expenses	5 016 267	16 000 011	16 679 108	18 110 631	19 514 205
Committed Surplus Funds Expenses	966 000	0	0	0	0
Total	6 516 934	17 420 457	18 163 681	19 731 801	21 259 060
<b>Programme 8 : Quality Assurance</b>					
Administration Expenses	469 161	481 086	586 559	704 191	736 077
Salaries and staff related costs	0	0	0	0	0
Direct Salary Expenses	1 450 000	1 354 792	1 463 175	1 580 229	1 690 845
Direct Project Expenses	4 336 320	4 578 599	5 542 950	6 858 437	7 389 966
Total	6 255 481	6 414 477	7 592 684	9 142 857	9 816 888
<b>Programme 9 : Monitoring and Evaluation (budget under admin 10% only)</b>					
Administration Expenses					
Salaries and staff related costs					
Direct Salary Expenses					
Direct Project Expenses			1 215 156	1 336 672	1 470 339

BUDGETS PER PROGRAMME	2013/2014	2014/2015	2015/2016	2016/2017	2017/18
Committed Surplus Funds Expenses					
<b>Total</b>			1 215 156	1 336 672	1 470 339
<b>Programme 10 : Skills Development for Low Level Literacy and Numeracy</b>					
Administration Expenses	281 741	126 507	100 263	114 424	105 806
Salaries and staff related costs	549 398	543 971	685 519	612 828	655 726
Direct Salary Expenses	662 264	655 875	684 777	634 143	678 533
Direct Project Expenses	9 588 449	7 314 597	9 006 247	8 337 562	8 711 085
Committed Surplus Funds Expenses	6 453 076				
<b>Total</b>	17 534 928	8 640 950	10 476 805	9 698 958	10 151 150
<b>Programme 11 : Employer Grants</b>					
<b>Total</b>	41 448 000	46 332 000	48 567 000	50 995 000	53 544 853
<b>Programme 12 : Cooperative Skills Development Support</b>					
Administration Expenses	67 869	74 831	88 456	107 442	109 983
Salaries and staff related costs	93 997	103 380	116 923	98 011	104 872
Direct Salary Expenses	145 141	160 371	150 075	148 362	158 747
Direct Project Expenses	1 851 204	2 037 566	2 382 932	2 385 558	2 492 431
Committed Surplus Funds Expenses	400 000				
<b>Total</b>	2 558 211	2 376 147	2 738 385	2 739 373	2 866 034
<b>Programme 13 : Skills Development Support for Small and Emerging Businesses</b>					
Administration Expenses	868 458	599 914	616 777	370 951	357 463
Salaries and staff related costs	1 387 323	1 031 792	1 185 331	1 273 780	1 362 945
Direct Salary Expenses	1 237 107	1 137 963	1 279 160	1 205 181	1 289 544
Direct Project Expenses	26 584 185	18 978 097	20 934 769	19 084 733	19 939 729
Committed Surplus Funds Expenses	14 073 500				
<b>Total</b>	44 150 573	21 747 766	24 016 037	21 934 646	22 949 681
<b>Programme 14 : Trade Unions, NGOs, CBOs skills development support</b>					
Administration Expenses	57 889	69 201	78 745	62 714	56 278
Salaries and staff related costs	154 227	164 330	217 571	374 225	400 421
Direct Salary Expenses	86 508	95 585	89 449	82 862	88 662
Direct Project Expenses	2 529 588	2 784 635	3 565 112	5 306 047	5 543 758
Committed Surplus Funds Expenses	1 060 000				

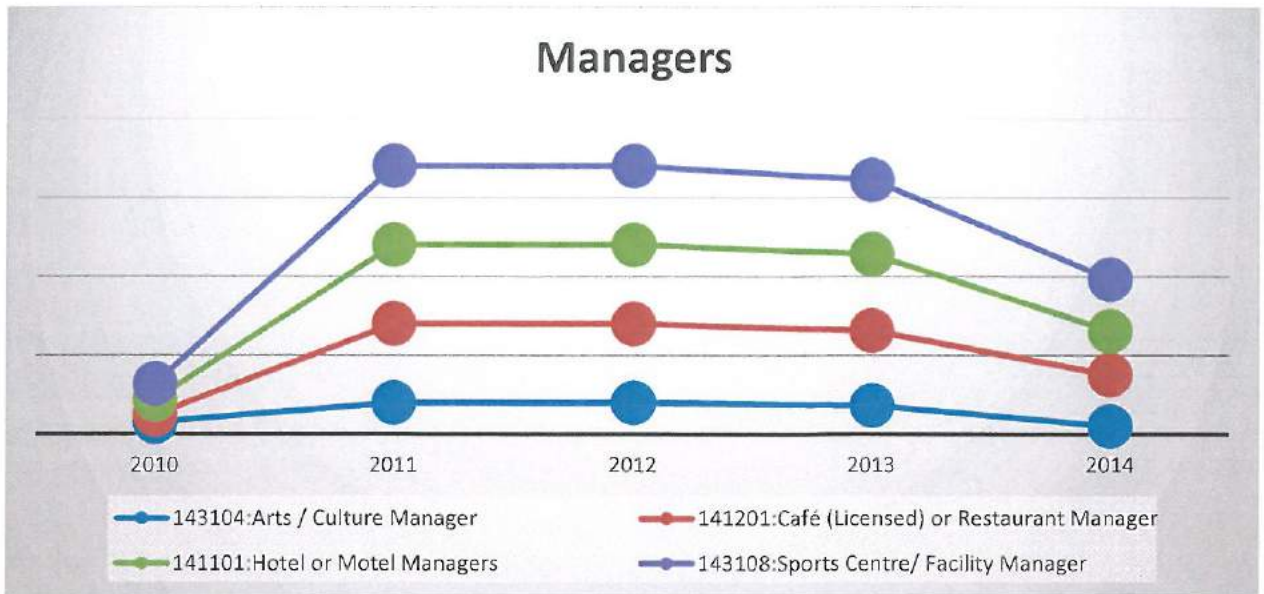
BUDGETS PER PROGRAMME	2013/2014	2014/2015	2015/2016	2016/2017	2017/18
Total	3 888 212	3 113 751	3 950 877	5 825 848	6 089 120
<b>Programme 15: Public -Private Partnership Education and Training</b>					
Administration Expenses	68 793	54 598	75 211	130 111	135 134
Salaries and staff related costs	100 000	75 814	100 000	100 000	107 000
Direct Salary Expenses	0	0	0	0	0
Direct Project Expenses	2 081 660	1 608 406	2 160 937	2 838 035	2 987 825
Total	2 250 453	1 738 818	2 336 148	3 068 146	3 455 959
<b>Programme 16 : Career Guidance and Outreach</b>					
Administration Expenses	225 069	88 841	0	0	16 108
Salaries and staff related costs	657 434	845 537	1 033 713	898 125	990 994
Direct Salary Expenses	547 642	605 107	566 257	1 722 937	1 843 542
Direct Project Expenses	10 972 667	11 242 237	12 918 306	9 596 354	10 350 693
Committed Surplus Funds Expenses	10 552 645				
Total	22 955 457	12 781 722	14 518 276	12 217 416	13 201 337
<b>TOTAL</b>	<b>315 282 000</b>	<b>250 802 000</b>	<b>263 112 760</b>	<b>276 056 300</b>	<b>290 133 258</b>
<b>Programme 17 : SETA Administration</b>					
Administration Expenses	12 858 000	13 509 000	13 395 423	10 803 576	14 073 294
Salaries and staff related costs	20 112 000	23 346 000	25 035 577	29 760 024	28 519 203
Total	32 970 000	36 855 000	38 431 000	40 563 600	42 592 497
<b>Grand Total</b>	<b>348 252 000</b>	<b>287 657 000</b>	<b>301 543 760</b>	<b>316 619 900</b>	<b>332 725 755</b>

## Annexure A: Organisation of SIC Codes per Sub-sector

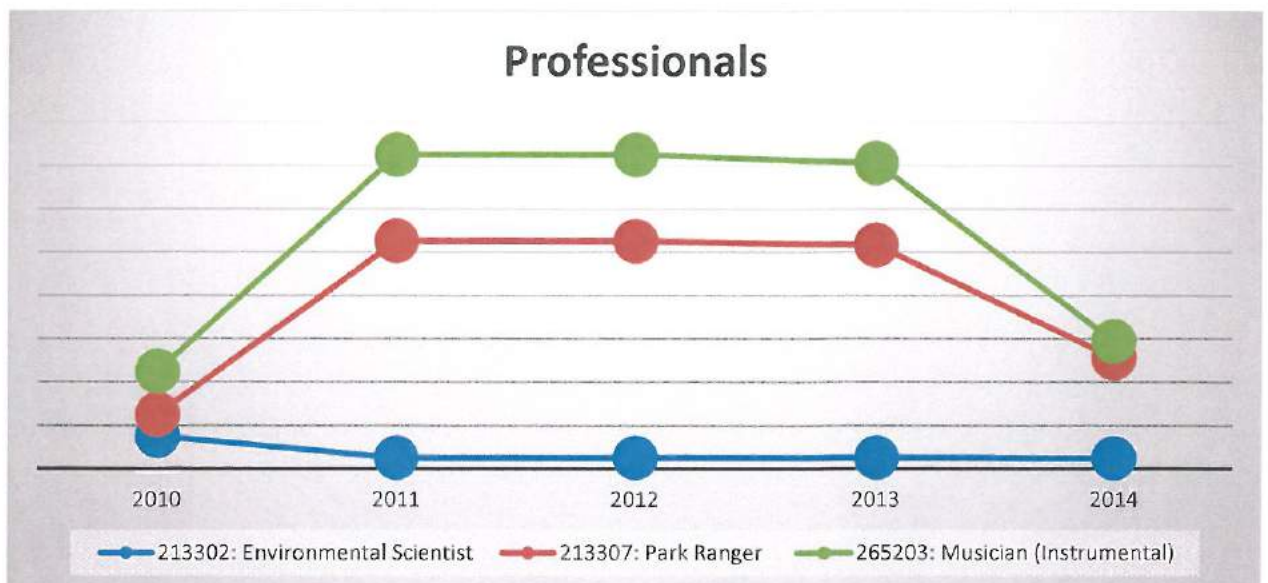
Group	SIC Code	Standard Category
<b>Conservation</b>		
(4 SIC Codes)	11520	Hunting and Trapping including related services
	96333	Game parks, reserves incl. but not limited to wildlife, parks, zoological or animal parks and botanical gardens
	96334	Activities of conservation bodies
	96335	Wildlife conservation incl. wildlife, game, parks, game reserves, zoological establishments, botanical gardens etc.
<b>Arts, Culture and Heritage</b>		
(15 SIC Codes)	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 and Buildings
	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	
<b>Gaming and Lotteries</b>		
(2 SIC Codes)	96419	Operation and management of Horse Racing Events and Clubs and Academies
	96494	Gambling, licensed Casinos & the National Lottery and but not limited to Bookmakers, Totalisators, Casinos, Bingo Operators
<b>Hospitality</b>		
(16 SIC Codes)	64101	Hotels, motels, boatels and inns registered with the SA Tourism Board
	64102	Caravan Parks and Camping Sites
	64103	Guest Houses and Guest Farms
	64104	Hotels, motels, boatels and inns not registered with the SA Tourism Board
	64105	Bed and Breakfast
	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
<b>Sport, Recreation and Fitness</b>		
(12 SIC Codes)	93195	Operation and management of Health and Well-Being Centres including but not limited to Hydros, Spas, Fitness Centres etc.
	96000	Recreational, Cultural and Sporting activities
	96002	Recreational, leisure and outdoor adventure activities including 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 sport academies
	96413	Promotion and management of sporting events and activities
	96415	Management and operation of non-motorized sporting activities
	96417	Sporting activities incl. but not limited to Sport Federations etc.
	96418	Management and operation of motorized sporting activities
	96491	The Operation and Management of recreation parks & beaches, fairs and shows of a recreational nature and recreational transport activities
<b>Tourism and Travel Services</b>		
(13 SIC Codes)	71214	Tour operators (Inbound and Outbound Tour Operators)
	71222	Safaris and Sight Seeing 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 incl. but not limited to Tourism Marketing, Tourist Information Centres, Publicity Associations
	99049	Guides incl. tourist river, mountain etc.

## Annexure B: Trend Analysis of Key Scarce and Critical Occupations per OFO Major Group

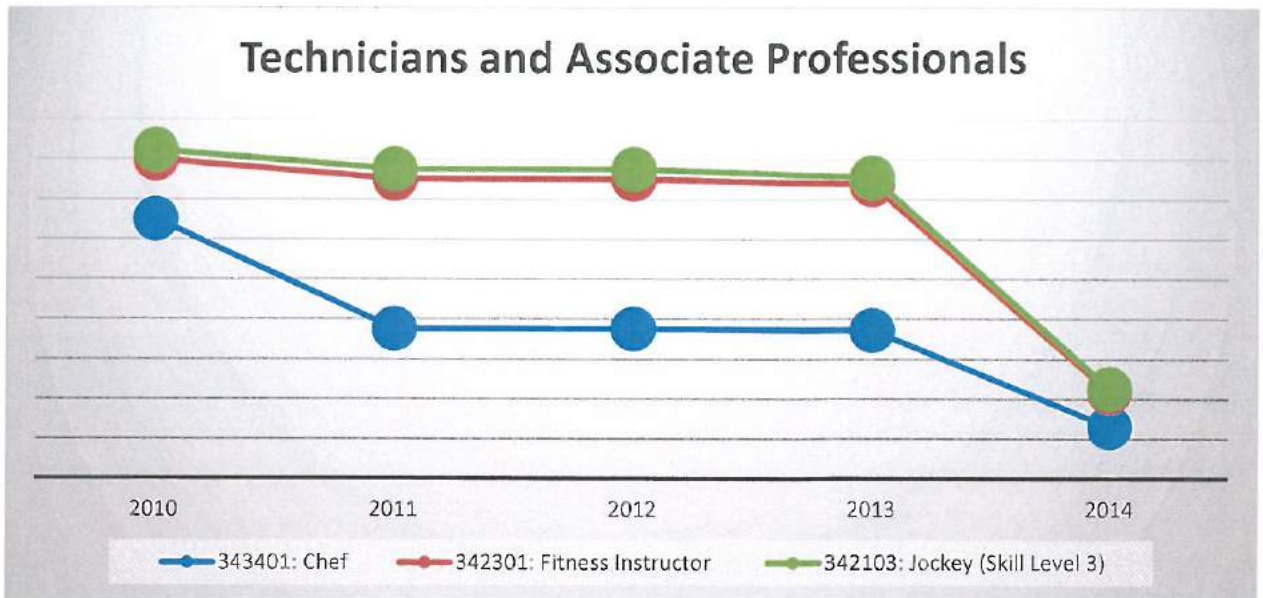


- As seen in the figure above, the Sports Centre/Facility Manager, Hotel or Motel Manager, Cafe (licensed) or Restaurant Manager and Arts/Culture Manager have been identified as key occupations across the CATHSSETA sector, which fall under the Manager OFO major group. The analysis of these 4 occupations shows that they have been listed on the list of Scarce and Critical skills from 2010 and the demand for these skills remains apparent for the 2014 period. It is encouraging to note however, that the demand for these skills follow a declining trend with an overall 44% average decrease in demand, which is indicative of the success of skills development initiatives in the sector to address these scarce and critical skills.

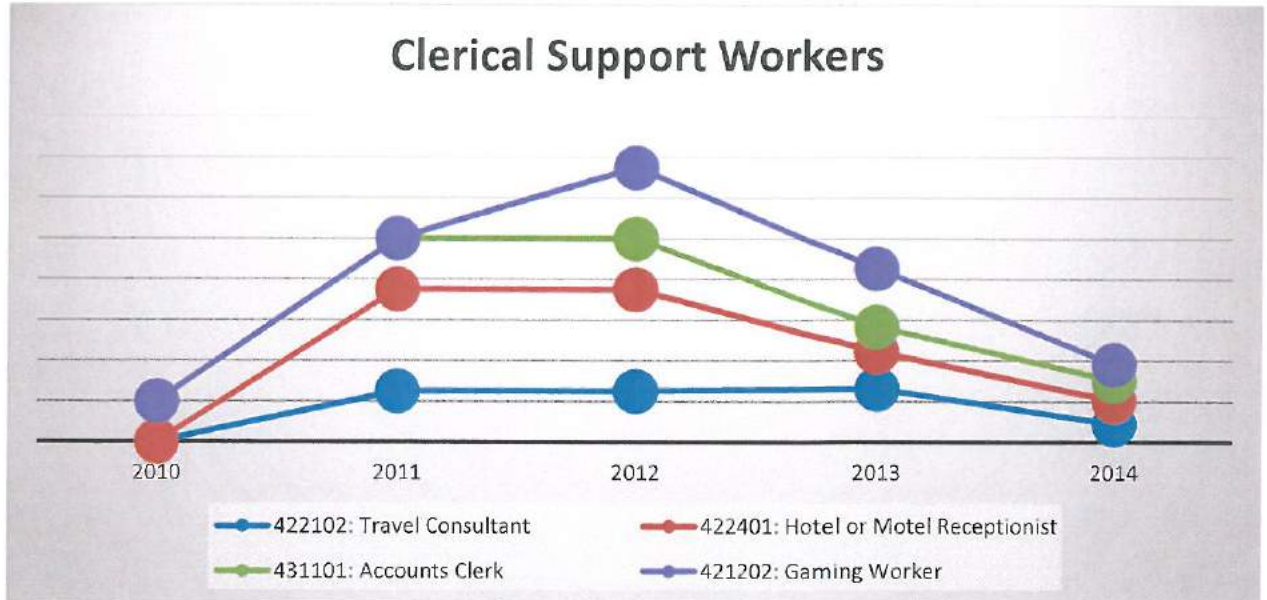


- The main occupations in the Professionals OFO major group that have been identified across the 5 year trend are Environmental Scientist, Park Ranger and Musician (Instrumental). With the exception of the Environmental Scientist, the scarcity of the Park Ranger and Musician occupations has declined by almost half for the 2014 period. The Environmental Scientist occupation has had consistent demand over the past 4 years and

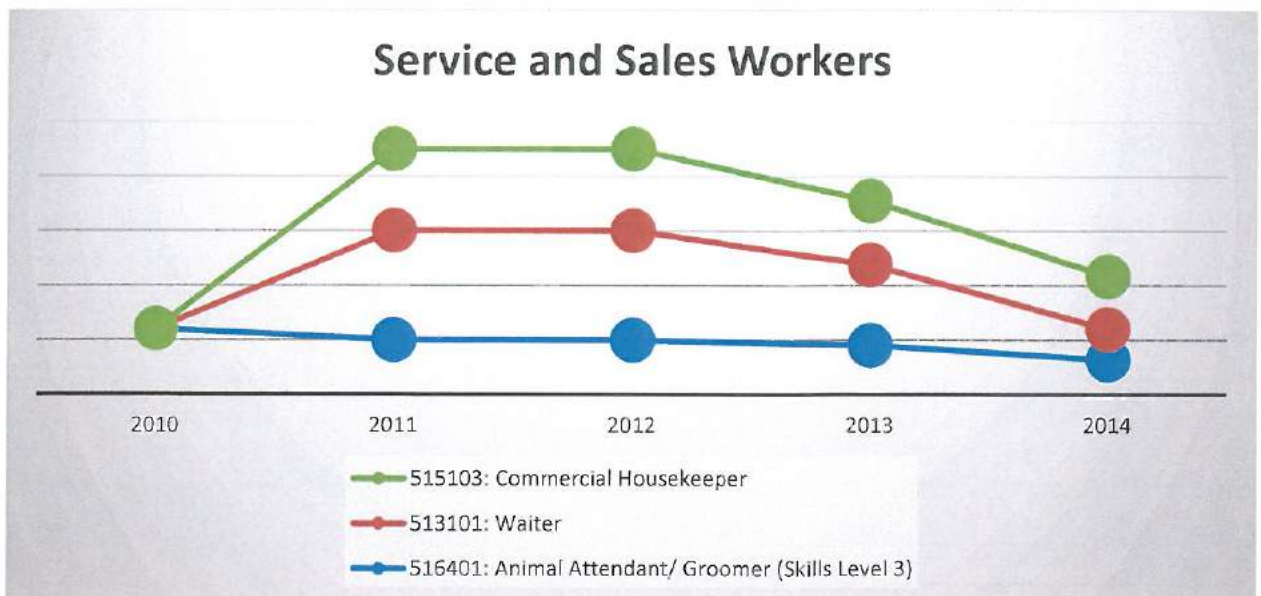
continues to remain a key occupation in this major group and is being addressed by CATHSSETA in partnership with stakeholders such as the Department of Environmental Affairs, GreenMatter and South African National Parks.



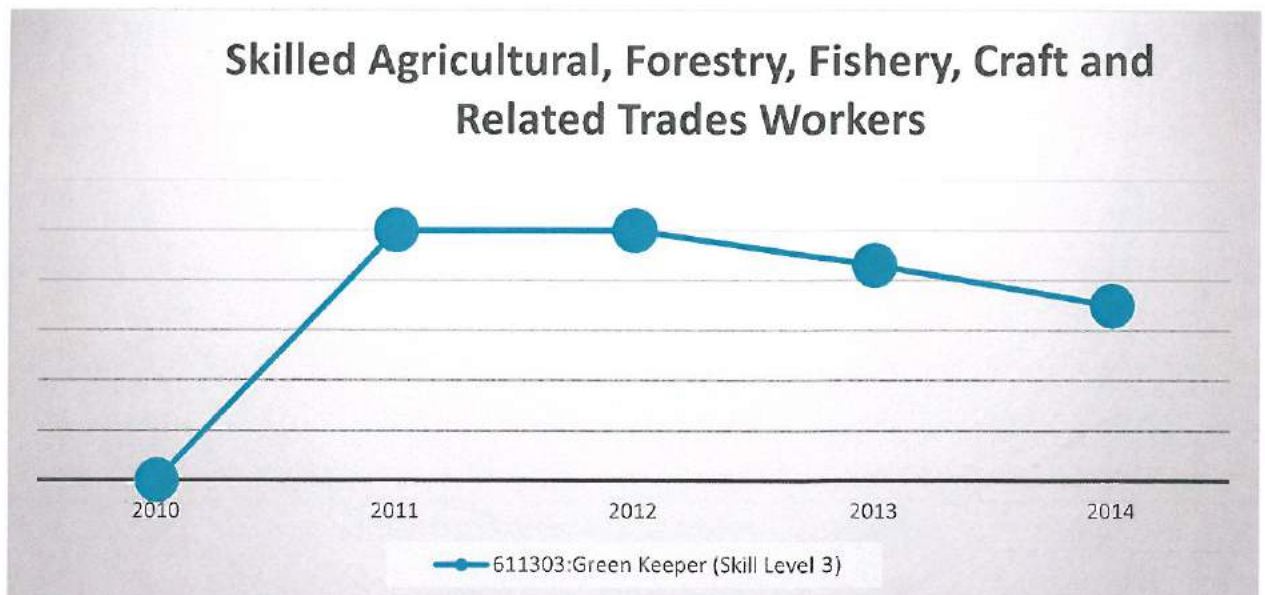
- In the Technicians and Associate Professionals OFO major group, the Chef, Fitness Instructor and Jockey occupations have been identified as the key occupations. It is positive to note that the demand for these occupations in the 2014 period shows a declining trend from the previous years, which is once again indicative of the success of skills development initiatives within the sector to address these scarce and critical skills.



- The Accounts Clerk occupation in the Clerical Support Workers OFO major group has been the only occupation that has consistently been listed as a key occupation from 2010. It is pertinent to note that the demand for the Hotel or Motel receptionist occupation remains at double that of the demand for the Travel Consultant occupation. The Gaming Worker occupation had a hike in demand for the 2011, 2012 and 2013 period, with a steady decline for the 2014 year.

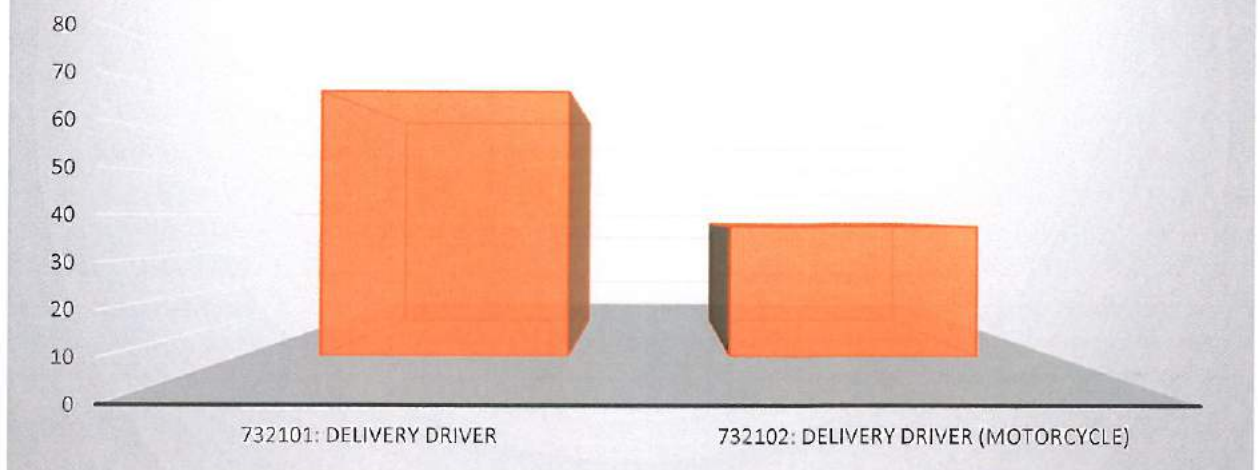


- Evaluation of the occupations in the Service and Sales OFO major group show that the central occupation that has constantly emerged from the 2010 period as key is that of the Commercial Housekeeper. The Waiter and Animal Attendant/Groomer occupations have emerged from 2011 and it is important to note that the demand in numbers required of the Waiter occupation far exceed that of both the Commercial Housekeeper and Animal Attendant/Groomer occupations.



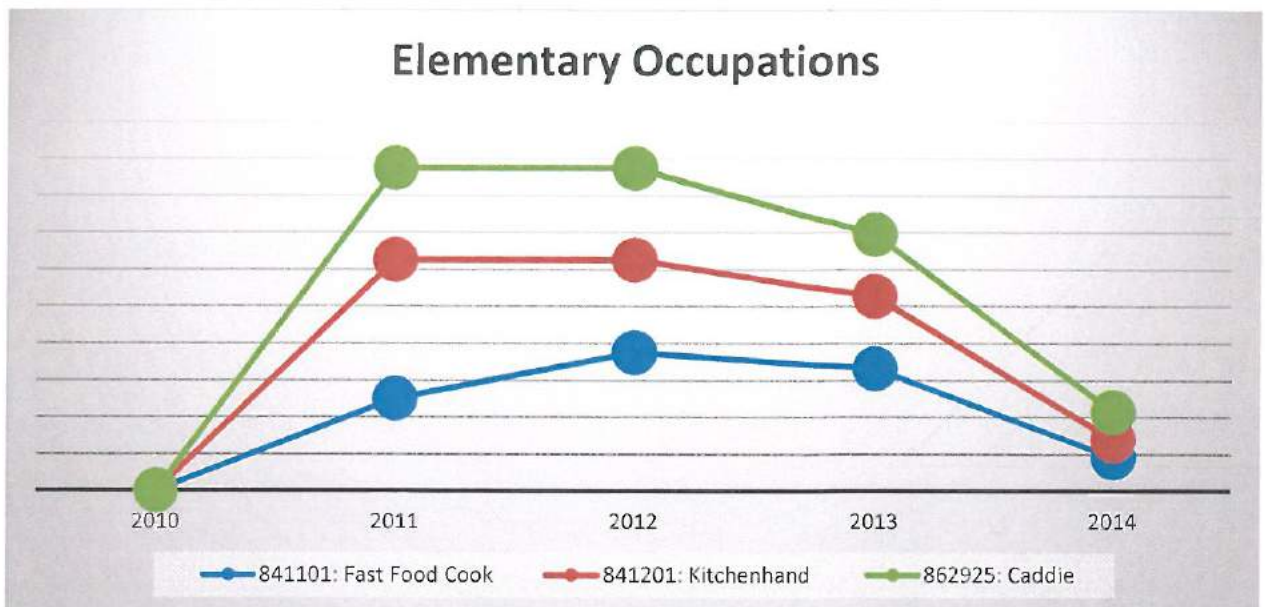
- In the Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers OFO major group, only the Green Keeper occupation has appeared consistently over the 5 year period of analysis. The demand however, for this occupation lies in the Green category of 0-20% scarcity as stakeholders have indicated that it is not immediately required and potential incumbents for these positions need to be developed over a period of time to gain the experience required to become a green keeper.

## Plant and Machine Operators and Assemblers



- There have been no occupations listed under the Plant and Machine Operators and Assemblers OFO major group for the past 4 years. The 2 occupations, Delivery Driver and Motorcycle Delivery Driver have for the first time been listed as key occupations for the 2014 period. The growth and demand for these occupations is reflective of current lifestyles in South Africa, where people are more inclined to order food and take away to be delivered to than houses than either go to a restaurant to eat or collect food themselves from a take away.

## Elementary Occupations



- Analysis of the Elementary Occupations OFO major group reveals that the key occupations that have emerged are that of the Caddie, Kitchenhand and Fast Food Cook. It must be noted that there were no occupations listed on the Scarce and Critical skills list that fell into this OFO major group for the 2010 period.

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