

# **Sport, Recreation & Fitness Sub-Sector**

# Labour Market Profile & Change Drivers Report

# **June 2016**









## **CONTENTS**

SPOR	T, RECREATION & FITNESS SUB-SECTOR	2
1.	INTRODUCTION	2
2.	SCOPE OF INDUSTRY COVERAGE	3
3.	KEY INDUSTRY ROLE-PLAYERS	4
4.	KEY LAWS, STRATEGIES AND PLANS	7
5.	ECONOMIC PERFORMANCE	8
6.	LABOUR MARKET PROFILE	.10
7.	MAJOR CHANGE DRIVERS	.13
8.	OCCUPATIONS WITH MOST JOBS	.19
LIST C	OF EXHIBITS	
Exhib	it 1: Standard Industrial Classification (SIC) Codes	3
Exhib	it 2: Key Role-Players	4
Exhib	it 3: Sport Structure in SA	5
Exhib	it 4:Major Sporting Codes	5
Exhib	it 5: Sports: Economic Performance in SA	8
Exhib	it 6: Employer Profile by Firm Size and Provincial Spread (2016)	.10
Exhib	it 7: Employee Profile by Firm Size and Province (2016)	.10
Exhib	it 8: Number of Employees by Race, Gender and Disability	.11
Exhib	it 9: Employees by Occupational Level	.11
Exhib	it 10: Employee Education Level by Sub-Sector	.12

### **SPORT, RECREATION & FITNESS SUB-SECTOR**

#### 1. INTRODUCTION

Sport, fitness and recreation plays an important role in promoting a nation's well-being, general health and social cohesion. The National Development Plan (NDP) recognises the importance of sports, fitness and recreation and treats it as a cross-cutting issue, with education, health and nation building.<sup>1</sup>

The NDP<sup>2</sup> states that all communities should have access to sports facilities and encourage the formation of amateur leagues. Local authorities can also promote exercise by ensuring that urban roads have proper pavements, developing cycle lanes, and installing traffic-calming measures. The plan proposes an initiative to encourage South Africans to walk, run, cycle or play team games. Expanding opportunities for participation in sports will help to ensure sports teams represent all sectors of society. It will also ensure that South Africa produces results that match its passion for sport.

Sports, fitness and recreation is also an economic sector in its own right that contributes to employment, social and economy of a nation. The business of sports is not just about the game being played but about sponsorship, marketing, eventing, travel, tourism and hospitality.

The sport industry creates direct economic benefits through employment creation, revenue from events, consumables and general taxation. Sport can be considered a composite sector that contributes to hospitality and tourism, to the textile industry through manufacture of sport clothing and to employee productivity through improved health.<sup>3</sup> It involves the media, sponsors, facility construction and infrastructure, refreshments and food, merchandising, insurance, event management, emergency services, transportation as well as security and traffic control.<sup>4</sup>

<sup>&</sup>lt;sup>1</sup> National Planning Commission. 2011. National Development Plan 2030: our future – make it work. National Planning Commission: South Africa.

<sup>&</sup>lt;sup>2</sup> Ibid.

<sup>&</sup>lt;sup>3</sup> Luiz & Fadal (2010). *An Economic Analysis of Sports Performance in Africa*. Available at <a href="http://www.econrsa.org/papers/wpapers/wp162.pdf">http://www.econrsa.org/papers/wp162.pdf</a>. Date of access 18 April 2016.

<sup>&</sup>lt;sup>4</sup> Department of Environmental Affairs and Tourism (2005). Overview of South African Sports industry competitiveness. DEAT: Pretoria.

#### 2. SCOPE OF INDUSTRY COVERAGE

The Sport, Recreation and Fitness (SRF) sub-sector is the third largest in CATHSSETA in terms of skills levy income. The 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.

The Sport, Recreation & Fitness sub-sector consists of 12 Standard Industrial Classification (SIC) codes:<sup>5</sup>

Exhibit 1: Standard Industrial Classification (SIC) Codes

SIC CODE	DESCRIPTION
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

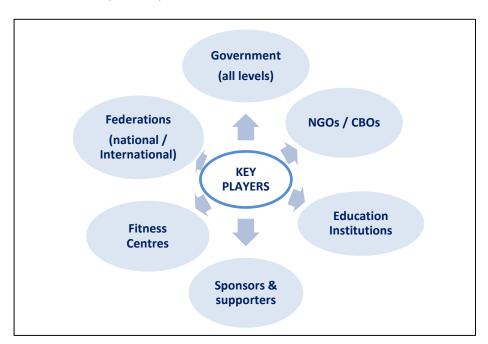
Source: Standard Industrial Classification Codes (UNO)

<sup>&</sup>lt;sup>5</sup> SIC codes are designed for the classification of establishments according to economic activity. It provides a standardised framework for the collection, tabulation, analysis and presentation of statistical data on establishments. This enables benchmarking across sectors within and across countries.

#### 3. KEY INDUSTRY ROLE-PLAYERS

Sport, fitness and recreation are very popular activities, with about 130 sport codes played in SA,<sup>6</sup> however the demand for sport is focussed heavily on a few sporting codes. This subsector is represented by very diverse organisations and people, far too many to mention.

Generally, the sub-sector can be categorised into 6 large groupings, which consists of the following:



**Exhibit 2: Key Role-Players** 

**SPORT**: There are 182 federations of which 75 are affiliated to South African Sports Confederation and Olympic Committee (SASCOC). There are 9 Provincial Sport Councils/Confederations, a number of Associations and over 40 000 Clubs. These federations are co-ordinated by SASCOC, and SASCOC is mandated to deliver SA teams for Olympics.

<sup>&</sup>lt;sup>6</sup> Sports Information and Science Agency (SISA)

<sup>&</sup>lt;sup>7</sup> CATHSSETA. 2012. Sport, Fitness and Recreation Chamber Guide. CATHSSETA: Johannesburg.

**Ministry of Sport Provides policy** and Recreation direction Sport and Monitors policy and **Recreation SA** facilitates funding Monitors **SA Sport Confederation and Olympic Committee** implementation **Implements** National programs at national **Federation of Sport Provincial Sport Implements Provincial Provincial** Council / **Academies of** programs at **Federation of Sport Implements** District/Local Sport District/Local Sport programs at Association Council

**Exhibit 3: Sport Structure in SA** 

Source: Ministry of Sport and Recreation

The South African Sports Confederation and Olympic Committee SASCOC is the controlling body for all sport in South Africa. SASCOC represents South Africa for all multi-coded sport participating in international games, such as the Olympic Games, Paralympic Games, Commonwealth Games and All-Africa Games. It is the national coordinating macro body for the promotion and development of high- performance sport in South Africa, including team presentation, and must consult with relevant sports bodies in this regard.

From the 138 national sports codes in South Africa, the following can be described as the most popular:

RECREAT Nort RUGBY tion CRICKET Doin ATHLETICS Sor NETBALL on Recreation (MACRe) with a mandate of putting in place an overarching recreation discourse

**Exhibit 4:Major Sporting Codes** 

and strategy within our society and also to position recreation at the centre of the developmental agenda of the state. In the past, South African municipal parks and recreation services focused on the building and maintenance of facilities. Since 1994, with the changing political landscape, the shift to provide recreation programmes to improve the quality of life of all people became an imperative of municipalities.

One of the primary drivers for an outcomes-based recreation service delivery is the need to promote healthy lifestyles, meet the social challenges confronting youth, provide opportunities for senior citizens to participate in physical activities, and address the need to promote social cohesion in a culturally diverse country.

**FITNESS:** The fitness industry in South Africa is well-researched. It tends to be private, individual and informal. The major fitness organisations are Virgin Active and Planet Fitness. There seems to be a general awareness of the facilities and services provided by these large multi-purpose health clubs, but very limited knowledge of the smaller or niche facilities or organisations.

## 4. KEY LAWS, STRATEGIES AND PLANS

Some of the defining laws, strategies and plans governing sports, recreation and fitness include, but are not limited to:

National Sport and Recreation Act of 1998, as Amended  South Africa and the Sports Confederation, national federations and other agencies; measures aimed at correcting imbalances in sport and recreation; dispute resolution mechanisms in sport and recreation; and empowers the Minister to make regulations; and to provide for matters connected therewith.  South African Institute  To ensure that sport in South Africa is practiced free from the use of the provided as the provided to provide the provided to provided the provided to provide the provided to provided the provided the provided the provided to provided the provided
as Amended  South Africa and the Sports Confederation, national federations and other agencies; measures aimed at correcting imbalances in sport and recreation; dispute resolution mechanisms in sport and recreation; and empowers the Minister to make regulations; and to provide for matters connected therewith.  South African Institute  To ensure that sport in South Africa is practiced free from the use of
other agencies; measures aimed at correcting imbalances in sport and recreation; dispute resolution mechanisms in sport and recreation; and empowers the Minister to make regulations; and to provide for matters connected therewith.  South African Institute To ensure that sport in South Africa is practiced free from the use of
recreation; dispute resolution mechanisms in sport and recreation; and empowers the Minister to make regulations; and to provide for matters connected therewith.  South African Institute To ensure that sport in South Africa is practiced free from the use of
empowers the Minister to make regulations; and to provide for matters connected therewith.  South African Institute To ensure that sport in South Africa is practiced free from the use of
connected therewith.  South African Institute To ensure that sport in South Africa is practiced free from the use of
South African Institute To ensure that sport in South Africa is practiced free from the use of
for Drug Free Sport Act, prohibited substances or methods intended to artificially enhance
Act No. 14 of 1997) performance.
Safety at Sports and To ensure that the safety and security of all spectators and sports
Recreational Events Act, participants at events at stadiums or other venues in South Africa are
(Act No. 2 of 2010) adequately nurtured, protected, administered and governed.
Fitness Industry Bill, To ensure that the fitness industry and the relationships between fitness
2016 practitioners, fitness establishments and the Fitness Industry Regulatory
Authority are effectively and efficiently administered and governed in the
best interests of the fitness industry and its stakeholders as a whole.
Transformation Charter The aims of the Charter are to: increase access and opportunities for ALL
for South African Sport   South Africans, including women, persons with disabilities, youth,
(August 2012) children and the elderly to sport and recreation opportunities.
National Sport and The overarching focus of the three values of the NSRP is to improve
Recreation Plan (NSRP)   access to and participation in sports as well as develop talent for the
sport and recreation sector. This translates to developing training and
education initiatives aimed at developing sports and recreation
personnel, particularly coaches, administrative and technical officials.
South African Coaching  The focus will be on RPL coaches; accreditation support for the National
Framework Federations and also training coach developers as facilitators, assessors
and moderators.
Strategic Plan for Sport   The Strategic Plan identified the following priority areas: development
and Recreation South and maintenance of sport and recreation facilities; transformation in
Africa (2015-2020) sport; school sport; community sport; and recreation. Key targets
include: advocacy for transformation in sport and recreation;
development of athletes by providing them with opportunities to excel;
supporting high performance athletes to achieve success in international
sport; and increasing by 10% the number of citizens accessing sport and
recreation activities.
Sports Tourism Strategy The aim is 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.

#### 5. ECONOMIC PERFORMANCE

Sport has always been an important part of society, but with the global emergence of sports tourism it has also become an increasingly important part of the economy. Consequently, the measurement and evaluation of benefits and costs (economic impact) of sporting events to host destinations and communities have become a focus of increasing interest to a number of groups, including policy-makers and sporting officials.

**Exhibit 5: Sports: Economic Performance in SA** 

Sports tourism value to total tourism	5% to 10%
Inclusion of sports in domestic holidays	50%
Participation in sports in domestic holidays	50%
Percentage of foreign visitors for sports events	10%
Foreign tourist spectators	60 to 80%
Sports sponsorships and broadcasting rights	R8.5 billion
Rugby World Cup (1995) South Africa <sup>8</sup>	RIGBY  RUGBY WORLD CUP 1985
Growth in foreign tourism	22%
Growth from lucrative overseas tourists	52%
Growth from African tourists	12%
Contribution to GDP	R8.9 Billion
Cricket World Cup (2003) South Africa <sup>9</sup>	ICC Cricket World Cup
Contribution to GDP	R2 Billion
Jobs created	3 500
Foreign tourists	20 000
Indian Premier League (2009) South Africa	INDIAN PREMIER LEAGUE
Total spend in South Africa	R1.5 billion

<sup>8</sup> www.sarugby.net

<sup>&</sup>lt;sup>9</sup> www.cricket.co.za

Hotel room nights	25 000
Flights	6 000
Spectators watched 59 games	800 000
Watching cricket for first time on TV	40%
FIFA World Cup (2010) South Africa <sup>10</sup>	SQUITA AFRICA 2010 FIFA WORLD COD
Contribution to GDP	R55.7 billion
Contribution by foreign tourists	R15.6 billion
Direct expenditure	R30.4 billion
Jobs created	400 000
Tax receipts	R7 billion
Foreign tourists	289 000
Commonwealth Games (2022) Durban <sup>11</sup>	DURBAN 2022 STORMEROUS HAD
Contribution to GDP	R11 billion
Infrastructure investment	R3.4 billion
Jobs creation	10 000
Foreign tourists	200 000

 $<sup>^{10}</sup>$  www.venturesafrica.com/the-world-cup-was-great-for-our-economy

<sup>11</sup> www.durban-2022.com

#### 6. LABOUR MARKET PROFILE

**Employer Profile:** The employer profile by firm size and provincial spread for sport, recreation & fitness is as follows:

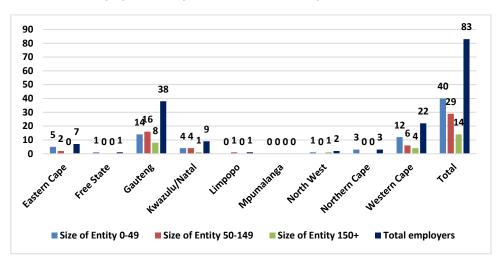


Exhibit 6: Employer Profile by Firm Size and Provincial Spread (2016)

Source: CATHSSETA (2016)

The number of skills levy-paying firms is a mere 83. Many of the organisations in the subsector are NGOs, CBOs and public entities.

**Employee Profile:** The employee profile of sport, recreation and fitness by firm size and province is as follows:

Provinces	Size of Entity			Total number
Provinces	0-49	50-149	150+	of employees
Eastern Cape	114	126	0	240
Free State	38	0	0	38
Gauteng	452	1298	2881	4622
Kwazulu-Natal	146	397	176	719
Limpopo	0	51	0	51
Mpumalanga	0	0	0	0
North West	27	0	209	236
Northern Cape	102	0	0	102
Western Cape	371	610	8789	9770
Grand total	1250	2473	12055	15778

Exhibit 7: Employee Profile by Firm Size and Province (2016)

Source: CATHSSETA (2016)

The majority of levy-paying firms are in Gauteng and the Western Cape.

The employee profile by race, gender, and disability is as follows:

9000 8196 7946 7490 8000 7000 6000 4800 5000 4000 3000 2435 2000 505 1000 16 0 White African Coloured Indian Male Female Race Gender Disability

Exhibit 8: Number of Employees by Race, Gender and Disability

Source: CATHSSETA (2016)

There are more males than females in the sub-sector.

The employee profile by occupational level is as follows:

**Exhibit 9: Employees by Occupational Level** 

OCCUPATIONAL LEVEL	TOTAL
Managers	1681
Professionals	948
Technicians & Associate Professionals	7116
Service & Sales Workers	2131
Skilled Craft & Related Trades Workers	471
Clerical Support Workers	1936
Plant, Machine Operators & Assemblers	171
Elementary Occupations	1232
Total	15686

Source: CATHSSETA (2016)

Technicians & Associate Professionals (45%) constitutes the largest part of the workforce in this sub-sector.

The education levels of employees are as follows:

Exhibit 10: Employee Education Level by Sub-Sector

<b>Education level</b>	Percentage
ABET/AET	3.0%
NQF 1,2	7.2%
NQF 3,4,5,6	83.3%
NQF 7,8,9,10	6.6%
Total	100%

Source: CATHSSETA (2016)

The sector is relatively well-educated with the majority between NQF bands 3 to 6.

#### 7. MAJOR CHANGE DRIVERS

Instead of discussing a multiplicity of change drivers, we have identified major change drivers with direct implications for skills development. These should be read in conjunction with national strategies and plans for sport, recreation and fitness.

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
1. Speed up transformation in sport with increased ur	gency	
<ul> <li>At the heart of the NSRP is a Transformation Charter and Scorecard that is intended to bring about the establishment of a competitive and demographically representative sport system guided by a value set based on the following key principles: equal opportunity; redress; fairness and just behaviour; equitable resource distribution; and empowerment and affirmation.</li> <li>The Transformation Charter target is that 80% of the selected national sports federations reaching their transformation targets of 2018/19; and 60 Sport and recreation bodies who meet their transformation targets and thus make themselves eligible to receive financial and non-financial support annually up to 2018/19.<sup>12</sup></li> <li>Recently, the Minister of Sport and Recreation declared that cricket, rugby, athletics and netball are prevented from bidding for major international tournaments because they are not reflective of the underlying demography of the country.</li> </ul>	<ul> <li>For the transformation vision for sport to be realised, school sport must be adequately resourced, especially for youth in underprivileged areas.</li> <li>The government must ensure, that there are adequate facilities for the majority of the population to play sport and that these are adequately maintained. This does not need expensive buildings, but recreational environments with basic facilities that can function as community hubs.</li> <li>Communities should organise sporting events, leagues, championships and generally look after the sports facilities once they are installed or developed.</li> <li>Corporate investments in grassroots sport should also be encouraged.</li> </ul>	<ul> <li>CATHSSETA could target mostly transformational imperatives in dealing with cricket, rugby, and netball, focusing on underserved areas.</li> <li>Empower educators in code specific coaching, technical officiating, team management and sports administration through the federations and in line with the South African Coaching Framework.</li> <li>Provide training to referees/umpires, coaches and administrators to change the demographic profile and address redress.<sup>14</sup></li> </ul>
demography of the country.		<ul><li>Support management development programmes,</li></ul>

<sup>&</sup>lt;sup>12</sup> Department of Sports and Recreation. 2013. Sport and Recreation South Africa: Strategic Plan 2015 -2020. DSR: Pretoria.

<sup>&</sup>lt;sup>14</sup> Financial Mail. 2016. Balls-up: why SA sport is so rotten, 11 May.

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
	<ul> <li>Investment in the training of administrators, coaches, trainers, match officials in underprivileged areas.<sup>13</sup></li> <li>With the current ban in place, administrators will find it difficult to secure resources needed to expand their codes and accelerate transformation.</li> </ul>	succession planning, coaching and mentoring.  • Align the deliverables of CATHSSETA to the Transformation Charter.
2. Sports Development at Grassroots Level		
<ul> <li>School sport is the bedrock of development and serves as a feeder system to clubs. However, in the 2014 transformation report it was evident that there is a critical shortage of trained coaches, referees/umpires, and technical officials, especially in the previously disadvantaged areas and public schools.</li> <li>The neglected state of school sport that was verified by data from the five sports, reflected shortcomings with regard to strategically planned and organised after school sport leagues, teams, and participation opportunities as opposed to an event driven approach in the past two decades.</li> <li>Participation of women and the disabled is particularly poor and major sports set targets that were not achieved, with little to no opportunities afforded to girls at school and club level.</li> </ul>	<ul> <li>This emphasises the need for a learner-centred, educator driven approach with structured activities after school with much closer cooperation and planning required between school sport code committees and the Provincial Federations.</li> <li>Governance practices require drastic attention for improvement, as this forms the basis for addressing the future shape of Federations.</li> <li>All SA's rugby Springboks and cricket Proteas are produced by about 36 schools. These are previously Whites only schools, public and private, English and Afrikaans medium.</li> <li>About a 100 previously "White" schools provide the talent for national and provincial teams in the major codes.</li> </ul>	Refer to section above.
	The same practice applies to hockey, athletics, netball, swimming and water polo. <sup>15</sup>	

<sup>&</sup>lt;sup>13</sup> Ibid.

<sup>&</sup>lt;sup>15</sup> Financial Mail. 2016. Right idea, but tone deaf as usual, 28 April.

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
<ul> <li>The audit revealed that with inadequate facilities, there will be no teams, no leagues, and no participation opportunities for youth and children in particular.</li> <li>There are 6 100 high schools in SA serving 3.9 million learners. Most of them do not offer organised sports.</li> <li>Occasionally a player will defy the odds and emerge from a school where there is no sports structure or tradition, but usually when such players are identified they are speedily recruited by a traditional sports school.</li> </ul>	<ul> <li>Excellent coaching, efficient administration, the pressure of competitive matches, experienced teacher-coaches who are technically proficient in their codes are needed to ensure that teams are represented of the national demographics.</li> </ul>	Implications for CATTSSETA
3. Sports Tourism		
<ul> <li>Following the successful hosting of the 2010 FIFA Soccer World Cup, SA is well poised to benefit from sports tourism. The country has also hosted other major sporting events such as 1995 IRB Rugby World Cup, 1996 African Cup of Nations, 2003 ICC Cricket World Cup, 2009 Indian Premier League (IPL).</li> <li>Sport tourism was one of the fastest-growing areas of the global travel and tourism industry.</li> <li>During a Golf Tourism seminar in Limpopo<sup>16</sup> it was noted that Golf Tourism statistics collated by the Sports Marketing Surveys of SA estimate that the South African golf industry generated a total revenue of R29.2 billion and created over 50 000 jobs. The overall worth of the industry, including the multiplier effect, is estimated to be R58.4 billion.</li> <li>Golf tourism is an important segment of the overall tourist market, both in terms of volume and spend-per-visitor, because it can drive substantial investment into resort</li> </ul>	<ul> <li>There should be policy and programme coordination between travel, tourism, hospitality, leisure and sport industries and departments.</li> <li>There is a need for coherent sports marketing campaigns.</li> <li>There is a need to identify the requirements of the sport tourism industry which are different and not addressed by the qualifications currently available.</li> <li>In addition, there lacks a long-term strategy or approach to retain the skills of people trained for major events.</li> </ul>	<ul> <li>CATHSSETA can help to identify requirements of the sports tourism industry which are unique and not currently addressed by available qualifications.</li> <li>CATHSSETA can assist by establishing and maintaining a database of skilled individuals to be made available for all major events hosted.</li> <li>Preparation of a skills development strategy required with a focus on identifying key interventions necessary by government and private sector in ensuring that skills of employees in sport tourism/event management are continually</li> </ul>

<sup>&</sup>lt;sup>16</sup> http://www.tourism.gov.za/AboutNDT/Branches1/domestic/News/Pages/Golf-Tourism-Seminar.aspx

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
developments, generating substantial economic growth and job creation. <sup>17</sup>		improved with a focus on service excellence.
4. Need for better sports administration at all levels		
<ul> <li>There is a need to improve the administration and management of sport at all levels.</li> <li>The national soccer team is ranked 70<sup>th</sup> in the FIFA rankings; cricket has not won a major international tournament since the advent of democracy; our athletes continually underperform at major events in comparison to other African countries; and rugby is in a rut.</li> <li>Currently SA sport talent is corralled in a handful of a few privileged schools.</li> <li>There are relationship issues between government and sport federations.</li> <li>Sport administration, governance and accountability are not keeping up with corporate requirements and the professional nature of sports.</li> <li>For example, the international trend is that sport should be managed by corporate managers, since it is a business. But SASCOC insists that sport must be run by sport people leaving sport rooted in a bygone era.</li> <li>Transformation targets have not been monitored regularly and remedial measures taken at the front-end of the process.</li> <li>School sports in the majority of schools is dysfunctional.</li> </ul>	<ul> <li>There is a need to review sport administration and management in SA by sporting code and find ways to improve efficiencies and effectiveness.</li> <li>There is a need to identify independent directors with the requisite skills to sit on boards.</li> </ul>	<ul> <li>CATHSSETA should partner with leading international institutions in providing cutting-edge training opportunities in sport administration, governance and management at all levels.</li> <li>A skills audit for administrators should be conducted.</li> </ul>

<sup>&</sup>lt;sup>17</sup> http://www.tourism.gov.za/AboutNDT/Branches1/domestic/News/Pages/Golf-Tourism-Seminar.aspx

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
5. Growth of Social Media		
<ul> <li>The shifting nature of the media is laying the groundwork for a potential fan-led revolution in sports globally, and sports marketing is being driven by it.</li> <li>According to the Financial Mail<sup>18</sup>, we are moving into virtual reality, mobile applications, mass individualisation and real-time player ratings. The environment is becoming extremely interactive.</li> <li>In the 2015 Champions League Final, in which Barcelona beat Juventus in Munich, 28 million people had 78 million Facebook interactions regarding the game and there were 2 million mentions on twitter.</li> <li>Examples of interactivity are rare in SA, though the Carling Black Label Cup had tapped into this in which fans of Chiefs and Pirates vote to decide who makes the starting line-up.</li> </ul>	<ul> <li>There will be huge consumer interest bringing in more money into the game.</li> <li>There is an opportunity for smaller codes like cycling and netball to acquire more sponsorship and compete on the global stage.</li> </ul>	■ CATHSSETA should provide training interventions in the form of workshops, talks by experts, short courses, seminars to inform stakeholders of the power of the social media in sports.
6. Impact of technology		
<ul> <li>The rise of virtual fitness instructors and wearable technology which can provide biometric data about one's workout without the need of a fitness trainer, has an impact on the fitness industry.</li> <li>Technology is also improving the segment's underlying fundamentals; enabling customized promotions, direct-to-consumer web, social media buy buttons, rewards program incentives, in-venue mobile payment, in-seat ordering and delivery, and real-time inventory production which remove friction points and better</li> </ul>	<ul> <li>As the demand for technologically enhanced equipment rises, gym and fitness related equipment is constantly being updated and or modified to enhance performance.</li> <li>This requires trainers / fitness instructors to be able to keep up with technology updates and be able to operate complex machinery and equipment.</li> <li>In order for the skill sets of fitness instructors to remain current and not become out-dated,</li> </ul>	■ CATHSSETA can possibly assist by dissemination of fact sheets/ periodic update sessions to fitness instructors to keep them up to date with improvements in technology by providing workshops where information and knowledge sharing amongst professionals in the industry takes place.

<sup>&</sup>lt;sup>18</sup> Financial Mail. 2016. Balls-up: why SA sport is so rotten, 11 May.

Skills-Related Change Drivers	Implications for Skills Development	Implications for CATHSSETA
	they need to learn how to get their skills to complement changing technology.	
7. Envisaged ban on alcohol advertising		
■ The current debates surrounding alcohol advertising and the Draft Bill on the Ban on Alcohol Advertising will negatively affect the revenue streams to the sport sector as well as arts and culture sector.	<ul> <li>If the Draft Bill proceeds in its current form it is inevitable that there will be negative consequences for the sport and recreation sector.</li> <li>The alcohol industry, which has historically been very supportive of sports programmes through generous sponsorship initiatives, will be forced to withdraw this support.</li> <li>The marketing skills development associated with sponsoring sport cease with the sponsorship deals. This will negatively affect skills development and growth in the marketing and sponsorship sectors.</li> </ul>	<ul> <li>CATHSSETA should conduct research on this issue to assess the potential impact on funding for training by sponsors.</li> <li>CATHSSETA should facilitate training on:         <ul> <li>online marketing</li> <li>channel marketing;</li> <li>social media;</li> <li>advertising; and</li> <li>communication.</li> </ul> </li> </ul>

#### 8. OCCUPATIONS WITH MOST JOBS

The occupations with the most number of jobs in the sub-sector gives an indication of where job opportunities are likely to be found. These occupations have higher job absorptive capacity than others.

It should be noted that occupations with the most jobs does not necessarily indicate a skills shortage<sup>19</sup> or occupations in high demand<sup>20</sup> or pivotal skills<sup>21</sup>. It simply indicates where are the jobs in the sub-sector.

There are 14 189 employees in the sub-sector, covering 314 different occupations. The mean is therefore 45. The occupations below are above the mean:

NO	OCCUPATION	EMPLOYED
1	Fitness Instructor	3766
2	Footballer	946
3	Receptionist (General)	820
4	Sales Representative (Business Services)	739
5	Amusement, Fitness or Sport Centre Attendant	603
6	Child Care Worker	499
7	Waiter	283
8	Office Administrator	279
9	Handyperson	251
10	Commercial Cleaner	239
11	Sports Centre / Facility Manager	237
12	Garden Workers	205
13	Sales Manager	194
14	Sports Coach or Instructor	186
15	Sales and Marketing Manager	147
16	General Clerk	141
17	Fitness Centre Manager	133
18	Corporate General Manager	130
19	Green Keeper	129
20	Customer Service Manager	120
21	Bar Attendant	116
22	Builder's Worker	104
23	Accounts Clerk	102
24	Chef	102
25	Sports Umpire	91

<sup>&</sup>lt;sup>19</sup> Scarce Skills refer to those occupations where there is a scarcity of qualified and experienced people, currently or anticipated in the future, either because skilled people are not available (absolute scarcity); or they are available but do not meet employment criteria (relative scarcity).

<sup>&</sup>lt;sup>20</sup> Occupations showing the highest employment growth.

<sup>&</sup>lt;sup>21</sup> PIVOTAL Programmes means professional, vocational, technical and academic learning programmes that result in occupational qualifications and may include a knowledge component that is normally delivered at a further education and training college or a university as well as a structured learning in an accredited training centre or an approved workplace.

NO	OCCUPATION	EMPLOYED
26	Operations Manager (Non-Manufacturing)	90
27	Sales Assistant (General)	86
28	Tunnelling Machine Operator	86
29	Cook	76
30	Gaming Worker	76
31	Cricketer	75
32	Mechatronics Technician	75
33	Outbound Contact Centre Consultant	75
34	Newspaper or Periodical Editor	74
35	Amusement Centre Manager	71
36	Biokineticist	71
37	Director (Enterprise / Organisation)	68
38	Kitchenhand	66
39	Personal Assistant	65
40	Agricultural Mobile Plant (Equipment) Operator	64
41	Retail Supervisor	59
42	Café (Licensed) or Restaurant Manager	52
43	Domestic Cleaner	52
44	Landscape Gardener	51
45	Business Administrator	50
46	Finance Manager	50
47	Security Officer	50
48	Caretaker	47
49	Other Sportsperson	47
50	Sports Administrator	46