



## **Sport, Recreation & Fitness Industry**

***CONSOLIDATED SUMMARY REPORT  
Imperatives and Recommended Actions for a Demand-Driven  
Approach to Skills Development in the Sport, Recreation &  
Fitness Industry***



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## **1. INTRODUCTION**

CATHSSETA appointed FR Research Services to conduct skills analysis research on the Sport, Recreation and Fitness Industry, which is a major sub-sector and levy contributor to the SETA.

The purpose of the research is to determine the skills needs within the designated industry and assess to what extent the CATHSSETA interventions are responsive to the needs of organisations in this industry. The skills intelligence gathered from the research is intended to feed into the CATHSSETA Sector Skills Plan (SSP) for the purposes of demand-led skills planning.

## **2. OBJECTIVES**

The objectives of this report are the following:

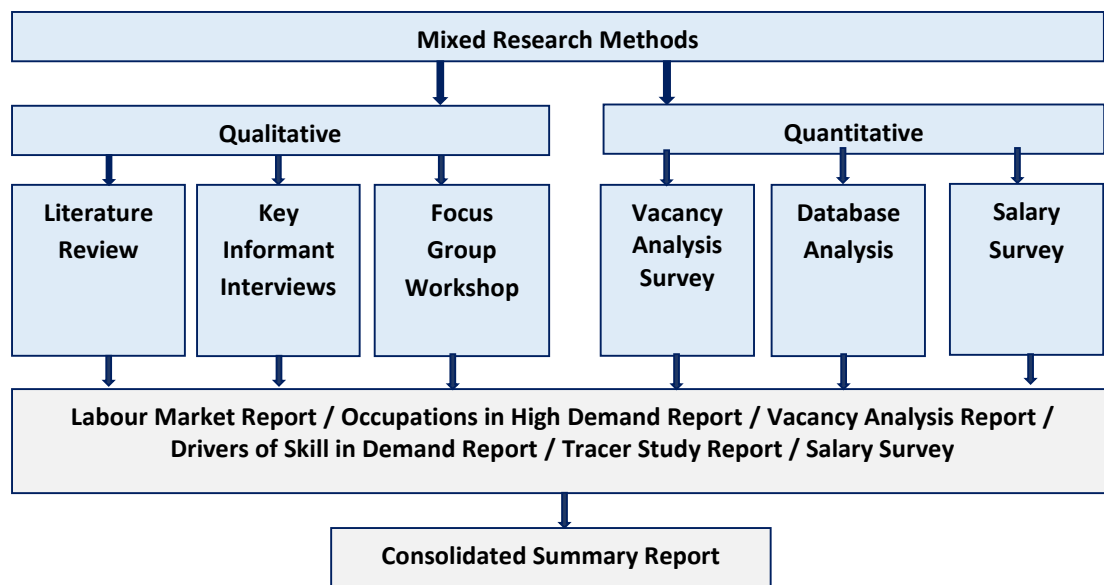
- Provide a consolidated summary of key findings and recommendations derived from a series of research studies conducted for this project to determine the skills needs in the industry.
- Identify which occupations are in high demand in the external labour market, if any, and skills gaps in the internal labour market of organisations in the industry.
- Recommend skills development interventions to the CATHSSETA at a strategic level based on the skills needs of constituent member organisations.
- Offer insights for sector skills planning.

### 3. RESEARCH DESIGN, APPROACH AND METHODS

#### 3.1 Research Design

The Research Design in this research project is the overall plan to connect the research approach (Mixed Methods Research) to the Research Methods that will be used to meet the objectives and key deliverables.

A graphical illustration of the research approach, design and methods is depicted below:



#### 3.2 Research Approach

Labour market research analysis is imperative to address skills imbalances, thus reducing skills mismatches and ensuring a productive and skilled workforce.

Labour Market Analysis (LMA) is a key element of acquiring labour market intelligence, which is vitally needed for informed decision-making in the sector. LMA involves analysing a comprehensive array of labour market-based and economic measures (signals and indicators) for making public investments in education and training. Reliance on a composite of labour market signals and indicators allow the analyst to form judgments on the basis of the weight of market evidence.

Proper and skilled LMA will enable CATHSSETA to achieve the following:

- Identify characteristics of employability;
- list occupations in demand;

- conduct analysis of wage and employment trends;
- establish and understand factors driving the demand for skills;
- guide training decisions;
- manage training systems;
- improve labour market efficiency; and
- plan SETA investments in training.

### **3.3 Mixed Methods Research**

A mixed methods research approach is employed for this research project. Mixed methods research is based on combining research methods in an informed way. A growing number of research and evaluation studies make use of mixed methods, that is, both quantitative and qualitative methods within a single study.

This method is based on the assumption that quantitative and qualitative methods has its own strengths and limitations. Therefore, combining them seems a good idea. It is a more comprehensive approach to finding answers to research questions, especially since many research problems are complex and cannot easily be answered using a single method.

Mixed methods research provides a basis for triangulation but, more often, they become the source of different ways of conceptualising the research problem. In this case, the skills needs of the Sport, Recreation and Fitness Industry currently and in the future. They might set out to look at the same phenomena from different points of view.

To fulfil the outcomes of the project, seven research studies will be undertaken. Collectively, the findings of these studies in the form of research reports will feed into the SSP as well as support CATHSSETA in making evidence-based decision-making on skills planning and training investments.

The 7 studies to be conducted are the following:

**Labour Market Profile:** This study will feed into Chapter 1 of the SSP which is required and it will involve secondary research such as industry, trade and economic publications. Data from the Quarterly Labour Force Survey will be disaggregated to occupational digit 4 levels to provide information on employer and employee size. The CATHSSETA database will also be mined for WSP/ATR data. This will be supplemented by primary research in the form of interview and workshops. A PESTEL Analysis will be conducted at workshops.

**Vacancy Analysis:** The focus of this study is on identifying hard-to-fill vacancies (HTFV) which provides an excellent means of identifying where firms are having difficulty in recruiting to meet their production requirements. A number of frameworks and researchers use HTFV to identify skills shortages.

The study will focus not so much on the frequency of vacancies but rather the length of time to fill it. This is signalled by the fact that employers take a long time to fill the vacancy. The absolute number of vacancies on its own tells us little: a large number, for example, may just

indicate that this is an occupation in which it is normal to have high turnover. The vacancies identified as H-T-F to constitute Chapter 4 of the Scarce Skills List. They will also feed in the Occupations into the High Demand List.

**Salary Survey:** This study will be established in 2 ways. A review of existing wage/salary trends reports for the purpose of identifying occupations relating to the designated sub-sector. And secondly, the administration of a survey to establish wage/salary trends among member companies. We will be focused on identifying occupations showing relatively high wage/salary growth above the inflation thresholds. It will feed into Chapter 4 of the Scarce Skills List. They will also feed into the Occupations in High Demand List.

**Tracer Study:** The purpose of this study is to establish employment outcomes of CATHSSETA training investments. The tracer study provides information about the whereabouts of graduates after the award, and linking this information with socio-biographic and study descriptors (e.g. gender, age, field of study, etc.). The main survey instruments will be a closed questionnaire for graduates and semi-structured questionnaires for key informants of trainers and employers. It will feed into Chapter 4 of the Scarce Skills List. They will also feed into the Occupations in High Demand List.

**Change Driver Study:** This study will draw on primary research – interviews and workshops – to identify skills drivers in the sub-sector. The focus of the workshop is obtaining information through PESTEL Analysis. Interviews will be held with experts in the sub-sector to obtain insights not normally found in the literature. This will be supplemented by a literature review. It will feed into Chapter 4 of the Scarce Skills List. They will also feed into the Occupations in High Demand List.

**Occupations in High Demand Study:** From all of the above studies an Occupations in High Demand Report will be developed. It will feed into Chapter 4 of the Scarce Skills List. They will also feed into the Occupations in High Demand List.

**Consolidated Summary:** Priorities and recommended actions for a demand-led approach to skills development in the Sport, Recreation and Fitness Industry. It will feed into Chapter 5 of the Sector Skills plan.

A key facet of the research design is to enable triangulation of data from a wide variety of sources. Triangulation refers to the use of more than one approach to the research investigation to corroborate the ensuing findings. By using a range of methods to measure the same phenomena, the findings can be tested for reliability and content validity.

#### 4. RESEARCH FINDINGS AND RECOMMENDATIONS

This section should be read in conjunction with the Interview and Workshop Report which is accompanied.

The research findings emanate from the various research studies mentioned earlier on the sports, recreation and fitness industry:

##### Finding 1 – Understanding the Sport Value Chain

- There is a need for CATHSSETA to understand the sport value chain. Such an understanding will enable the CATHSSETA to make informed decisions about funding skills development in sport. Currently, CATHSSETA has not defined the sport value chain. Therefore, funding windows for sport, recreation and fitness have no impact on the industry.
- There is a need to understand the bargaining power of the different role-players in the sport value chain.

##### **Recommendation:**

- CATHSSETA should conduct a value chain analysis before opening funding windows.
- This is necessary for CATHSSETA to align its scope of coverage to the value chain and determine its skills development priorities for the industry.

##### Finding 2 - Improving Schools Sports Coaching

- A major reason why South Africa is lacking world-class sportsmen and teams in various codes such as soccer, cricket, athletics, etc. is because the development structures at school levels are lacking in most schools.
- Soccer, the number one sport in the country, has a national team who performs dismally year after year. Domestic professional clubs are outperformed on the African continent. Our best players are not playing in the major leagues of the world. The administration of soccer is a problem. There are not enough qualified and proficient coaches at all levels in the game. The same can be said for many other sporting codes.
- The European Coaching Licence is very expensive and effectively limits access to potential coaches. The South African Football Association (SAFA) is responsible for all

soccer coaching, but does not have the infrastructure or commitment to role training out nationally at all levels.

- We are lacking a USSASA type of umbrella body to manage school sports collectively under one body. The primary mandate of this body is to ensure that all learners in the country have access to organised school sport activities.
- Whilst CATHSSETA is not responsible for the promotion and management of school sports, we need to determine the role of CATHSSETA in school sports. It should be playing a constructive role, since these learners are the players for professional clubs and national teams in the future.
- CATHSSETA should conduct research on the state of school sports, its nature and its role in society. It should suggest meaningful solutions to improve the state of school sports.

**Recommendation:**

- Whilst CATHSSETA is not responsible for the promotion and management of school sports, we need to determine the role of CATHSSETA in school sports. It should be playing a constructive role, since these learners are the players for professional clubs and national teams in the future.
- CATHSSETA should conduct research on the state of school sports, its nature and its role in society. It should suggest meaningful solutions to improve the state of school sports.
- A USSASA type of structure is a way to ignite participation in schools for the nation.

**Finding 3 - State of Coaching**

- There is a need to upskill unqualified coaches through the introduction of some form of regulation/accreditation of coaches into the industry in most sporting codes, to introduce quality control through professional supervision, and to ensure on-going professional development. In sports such as soccer, there is regulation, but there is not sufficient access to enter the coaching programme due to poor management of the programme, limited number of intakes and funding issues.
- The biggest hindrances to coaching within clubs were cited as the lack of funding, facilities and training opportunities.



- An example of the poor management of sport is in golf. There is no regulation whatsoever for the training of caddies. They are used as casual workers.
- A major challenge is facing many sport federations is the lack of leadership, administration and management skills, particularly by those holding leadership positions in organisations. They are unable to manage federations as a business entity that is financially viable over the long-term. With a dearth of leadership skills, the sport code suffers because of a lack of direction and intent.
- There is also a lack of proper support systems to promote and improve coaching at academy level, support systems, with many federations unwilling to make a commitment.

**Recommendation:**

- CATHSSETA should form a working partnership with SASCOC to promote coaching. CATHSSETA should invest in the implementation the SA Coaching Framework ideally to the sum of R65 million a year (adjusted to inflation y-on-y) for sports coaching via SASCOC structures.
- CATHSSETA should direct all discretionary grant project funding in sport, recreation and fitness to sport coaching, rather than fund a series of disparate initiatives that have very little impact on the country. The focus should be on funding the development of the national coaching framework and the training of coaches and master coaches via SASCOC, which is best suited to deliver on this.
- SASCOC should be responsible for measuring the impact of the South African Coaching Framework 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.
- Investment should be diverted to implement the SASCOC Coaching Framework in the following areas: employment and deployment of coaches, education and development of coaches, capacitating the National Federations, capacitating national, provincial, municipal and local organisations.
- Investment should also be given to the development of the Coaching Qualifications Framework for the development of qualifications.
- There is a need to regulate the working conditions of caddies. There is also a need to offer training opportunities for caddies – qualifications and learnerships. A career pathway should be developed for caddies. Some of these caddies are very good golfers and have the potential to coach golf or become golfers.

#### Finding 4 - Role of TVET Colleges

- There is no provision in public TVET Colleges in SA to offer accredited qualifications and non-accredited skills programmes to its communities.
- TVET Colleges have the facilities, but seem to lack interest in developing training for the industry.

##### **Recommendation:**

- These facilities can also be used as night schools for the many sports clubs in their locality to train in sports management and administration and coaching.
- The CATHSSETA should have a conversation with TVET Colleges and twin them with federations and associations in their respective areas with a view to promoting sports for leisure and business.
- As part of a CATHSSETA-SASCOC partnership, the provision of coaching using the facilities of TVET Colleges should be effected.

#### Finding 5 - Funding Constraints

- The federations, associations and clubs across all sporting codes are either exempt from skills levies, or instances, where levies are paid they are very small. Most of the administration of sports takes place on a voluntary basis, with a very small core staff in representative organisations. Consequently, in organisations especially at grassroots levels, where funding is desperately needed it is not available from the CATHSSETA.
- Previously, the CATHSSETA funded post-graduate research based on the research needs articulated by the SETA. This has been discontinued, but given the needs to know more about the sports, recreation and fitness industry, there is a strong case to restart this funding window.

##### **Recommendation:**

- CATHSSETA should explore ways to fund a constituency that does not collectively contribute much by way of levies, but fulfils a vital role of supplying athletes to the highest levels of all sport codes.
- Post-graduate research funding should be re-instated.

### **Finding 6 – SETA Service Delivery**

- Service delivery and stakeholder relations is a challenge. Training providers mention that late payments for training services is very common, leading to closure of training. Funding applications are a cumbersome process. Companies complain that the constant turnover of SETA staff means that there is no continuity to deal with queries. Graduates complain of not receiving certificates after completing a qualification successfully. In some cases, certificates do not contain the SAQA logo.
- Another major problem is the lack of face-to-face communication between companies and the SETA. SETA staff also do not visit member companies in the industry, especially the dominant players.
- Relationships with other regulatory bodies, e.g., the Department of Trade and Industry and Tourism are non-existent.

#### **Recommendation:**

- An organisational development initiative should be implemented in the SETA to improve productivity, efficiencies, customer service and communication with stakeholders.
- The SETA should have regular interactions with stakeholders either through regional or chamber skills development forums.
- Stakeholders should be kept abreast of developments in the SETA and articulate their needs and concerns to the CATHSSETA.
- A stakeholder satisfaction survey should be administered to constituent employers, training providers and learners of the SETA.

### **Finding 7 – Building capacity in the structures and system**

- Leadership, management, administration, stakeholder relations, marketing, corporate governance and public relations capacity within the Federations and its associations is a concern.
- Without the skills to manage these bodies as a going concern along corporate business lines, they will struggle with ripple effects on the country as a whole.

**Recommendation:**

- CATHSSETA should open funding windows to train sport administrators in managing their organisations effectively and efficiently.
- It is better for CATHSSETA to fund initiatives that are underway, since there is a history of such training, rather than start the process anew.
- A training needs analysis should be conducted with the various Federations.

**5. OCCUPATIONS IN HIGH DEMAND**

Based on the various research studies, there are a few occupations in high demand. The major challenge is to address skills gaps (critical skills) in the industry. There is a dire need to train coaches at all levels and in all sport codes.

However, priority should be given to the following occupations:

NO	OCCUPATIONS IN HIGH DEMAND
1	Qualified coach and master coach (all sport codes)
2	Equine veterinary surgeon
3	Sport Technical Analyst
4	Bio-Mechanist