



VACANCIES

Gaming and Lotteries Industry

Vacancy Analysis Survey

June 2016



1. INTRODUCTION

As the custodian for skills planning, CATHSSETA conducts research to identify skills imbalances in the Gaming and Lotteries industry. This information enables CATHSSETA to make informed decisions and investments on skills planning in the industry. Therefore, a critical element in the skills planning mix is the identification of skills shortages.

Hence, this study identifies skills shortages in the Gaming and Lotteries industry.

2. SKILLS SHORTAGES

Skills shortages may result in imbalances or disequilibrium in the labour market leading to bottlenecks or inefficiencies. Therefore, it is necessary to identify skills shortage and determine the reasons for such shortages currently and in the future.

Skills Shortage: *The demand for workers for a particular occupation is greater than the supply of workers who are qualified, available and willing to work under existing market conditions.¹ A more precise term to use is “occupation shortage” instead of “skills shortage”, although the latter seems to be commonly used internationally.*

It is necessary to keep the following in mind when measuring skills shortages:

- A skills shortage may be relative to location, equity considerations, work conditions, work experience or quality concerns. People may possess the qualifications, experience and skills but are unwilling for a variety of reasons to fill the post.
- In practical terms, skills shortages tend to be interpreted or measured as difficulties in filling vacancies.² This is far the strongest indicator for measuring skills shortages in the labour market.
- This means that a shortage in an occupation is the aggregation of hard-to-fill (HTF) vacancies across firms. These vacancies are those that remain unfilled after a certain period of time despite of all reasonable efforts by the firm.
- This data enables us to obtain information on the following: vacancy rates (the number of vacancies); vacancy duration (length of vacancies); the severity of the vacancy (how difficult to recruit); and the degree of completion for the vacancies (the number of applications for the vacancies).
- Some researchers draw a clear line between “skills shortage and hard-to-fill vacancies” (the people with the right skills just do not exist) and other hard-to-fill vacancies (the

¹ Shah, C. & Burke, G. 2003. Skills shortages: concepts, measurements and implications, Monash University, Working Paper 52, November.

² Shah, C. & Burke, G. 2003. Skills shortages: concepts, measurements and implications, Monash University, Working Paper 52, November.

people with the right skills do exist, but they do not apply for positions because of non-skills related factors, e.g., location of work)³.

- Not every HTFV is a consequence of a skills shortage or a supply-side deficit.
- Therefore, data is gathered on skills shortage [related] vacancies (SSV) and other HTFVs [not skills related].

3. RESEARCH METHODOLOGY

The research methodology for this study comprises 3 steps:

- Engagements with CATHSSETA to generate a list of occupations. These occupations included generic occupations such as general manager and office manager, as well as industry-specific occupations such as croupier, bookmakers and so on.
- Conduct an online survey of stakeholders to determine if occupations on the list are experiencing a shortage and reasons thereof.
- Host a workshop with industry participants to discuss survey findings.

4. VACANCY ANALYSIS SURVEY

The list of occupations obtained from CATHSSETA formed the basis of the survey questionnaire wherein industry respondents were prompted to identify which occupations were in shortage supply currently and possibly in the future.

Hard-To-Fill Vacancies (HTFVs) act as a proxy for skills shortages. Respondents were asked to identify if they had any positions that had been vacant for **longer than 6 months**.

For each HTFV, respondents were further asked to identify:

- The reason for the shortage currently and possibly in the future.
- The implications of a skills shortage for the employer.

Respondents were also offered the opportunity to enter occupations not included on the questionnaire with the same follow up questions probing the reason and implications of the skills shortage.

³UKCES. 2010. A Theoretical Review of Skills Shortages and Skills Needs, Evidence Report 20, May: London.

A total of 83 stakeholders were identified from the CATHSSETA database. From these:

- 10 had incorrect email addresses and the invitations bounced.
- 73 email invitations were successfully delivered.
- 46 emails were delivered and not read.
- 23 completed questionnaires.

This translates to a 27.7% response rate. Even though the number of responses are not statistically significant (despite numerous efforts to get employers to complete the online survey), the participation rate is good with more than a quarter of the sector represented.

Since triangulation is used in this project, the findings of the survey can be corroborated with other sources of research evidence.

5. FINDINGS

The following can be gleaned from the survey:

- The number of reported skills shortages are low and when further interrogated, they represent skills gaps (top up skills needed) rather than skills shortages (occupational shortages).
- The highest number of responses indicating a shortage in any occupation was 5 out of 23 (Trainer). Four out of 23 respondents indicated a hard to fill vacancy for Gaming Dealer and Electronic Equipment Mechanician.
- Electronic Equipment Mechanician (OFO 672104) is listed on the DHET list of Occupations in High Demand⁴ and is therefore acknowledge to be in shortage nationally. The relative lack of reported HTFVs is likely due to the sector having a strong ability to attract skills.
- Remuneration as a driver was listed very infrequently which supports the argument that the Gaming and Lotteries sector has a relative advantage in attracting skills.
- The main reason that respondents cited were a lack sufficient and/or appropriate experience. This supports the argument that the reported HTFVs are due less to skills shortage but rather to specific skills gaps.

⁴ Department of Higher Education and Training (2015) List of Occupations in High Demand: 2015

- It can be argued that there are sufficient people in the industry but the combined level of competency is not adequate to be as competitive as desired. The stated implications of listed shortages relate to competitive performance and the ability to innovate.
- Respondents added 6 occupations to the list that was generated through the first step in the methodology. All of these are either industry-specific or are general skills that require industry experience.

Occupation	Reason	Implications
Accountant with Gaming experience	Equity considerations (race, gender and/or disability)	Quality of products and services reduced
Gaming Statistician	Lack of relevant qualifications	Increase in operating costs
Gaming board auditor	Lack of relevant qualifications	Increase in operating costs
Equine Veterinary and Surgeon	Lack of relevant qualifications. Lack sufficient and/or appropriate experience	Reputational damage to company
Count administrator	Lack of relevant qualifications	Relationship problems among staff
Auditors (Compliance)	Lack sufficient and/or appropriate experience	Increase in operating costs

- Gaming Statistician and Gaming board auditor in particular should be investigated further in order to determine if there are supply issues into these gaming specific occupations. This should include the nature of their demand since that they were not included in the initial list of occupations.
- Respondents identified even fewer future skills shortages. No occupation was identified by more than 2 out of the 23 respondents. This indicates that there are no significant concerns on skills (in terms of absolute shortage) in the next 2 to 5 years.
- Qualitative engagements in the workshop support the premise that skills shortages and the risks of such shortages in the future are low.

6. CONCLUSION

Skills shortages in the Gaming and Lotteries industry are low currently and in the future. Respondents in the survey as well as participants in the workshop indicated skills gaps rather than shortages.

APPENDIX A – ONLINE SURVEY QUESTIONNAIRE



The CATHSSETA is conducting a job vacancy and skills shortage survey for the Gaming and Lotteries industry.

The findings of this survey will feed into the Sector Skills Plan. This Workplace Survey will provide valuable information on the demand side of the labour market. It will collect information from CATHSSETA employers on hard-to-fill jobs and their impacts for employers, as well as current and future skills shortage vacancies in the economy.

Human resources professionals and employers will obtain unique insights into both the nature and extent of recruitment difficulties and skills shortages in the labour market as well as valuable information on industry training needs.

As the respondent, you will benefit from completing this questionnaire by having the ability to use the data to establish benchmarks for your company's labour dynamics.

The data reported on this questionnaire will be treated in strict confidence. We do not require your name or that of your company.

For technical assistance please call 011 367 0790 or for administrative support email info@research.co.za.

1. Which province is your company located in?

Gauteng
 Kwa-Zulu Natal
 Western Cape
 Eastern Cape
 Free State
 Mpumalanga
 Limpopo
 North West
 Northern Cape

Other (Please specify):

2. How many permanent employees do you employ?

1 - 49
 50 - 149
 150+

CURRENT Hard to Fill Vacancies

The purpose of this section is to identify **HARD-TO-FILL VACANCIES (HTFVs)** that your company **CURRENTLY** has and the reasons for the HTFV. **HARD-TO-FILL VACANCY(HTFV)** refers to an occupation in your company that takes longer than 6 months to find a suitable candidate.

Please examine the occupations listed, for each that you would classify as hard to fill in your organisation, indicate the reason and implications of this vacancy by selecting the most appropriate response from the dropdown boxes.

	3. What do you believe is the main reason for this vacancy to be hard to fill?	4. What are the implications of this vacancy being hard to fill?
(a) Director (Enterprise / Organisation)	-Select-	-Select-
(b) Small Business Manager	-Select-	-Select-
(c) Office Manager	-Select-	-Select-
(d) General Manager	-Select-	-Select-
(e) Accountant (General)	-Select-	-Select-
(f) Economist	-Select-	-Select-
(g) Training and Development Professional	-Select-	-Select-
(h) Program / Project Administrators	-Select-	-Select-
(i) Gaming Manager	-Select-	-Select-
(j) Gaming Dealer	-Select-	-Select-
(k) Gaming Inspector	-Select-	-Select-
(l) Gaming Supervisor	-Select-	-Select-
(m) Gaming Pit Boss	-Select-	-Select-
(n) Gaming Table Operator	-Select-	-Select-
(o) Surveillance Manager	-Select-	-Select-
(p) Croupier	-Select-	-Select-
(q) Floor Supervisor	-Select-	-Select-
(r) Shift Managers	-Select-	-Select-
(s) Slots Manager	-Select-	-Select-
(t) Electronic Equipment Mechanician	-Select-	-Select-
(u) Betting Agency Manager	-Select-	-Select-
(v) Bookmaker	-Select-	-Select-
(w) Bookmaker's Clerk	-Select-	-Select-
(x) Counter Clerk	-Select-	-Select-
(y) General Clerk	-Select-	-Select-
(z) Racing Manager	-Select-	-Select-
(aa) Trainer	-Select-	-Select-
(ab) Jockey	-Select-	-Select-
(ac) Handicapper	-Select-	-Select-
(ad) Steward/ Stewardess	-Select-	-Select-
(ae) Lottery Manager	-Select-	-Select-
(af) Handyperson	-Select-	-Select-

If the occupations were not listed above, please specify the occupation that you currently find hard to fill, the reason and the implications of the shortage.

	5. Occupation / Job Title	6. What do you believe is the main reason for this vacancy being hard to fill?	7. What are the implications of this vacancy being hard to fill?
(A) Other (Specify) 1	<input type="text"/>	-Select- -Select-	-Select- -Select-
(B) Other (Specify) 2	<input type="text"/>	Lack of relevant qualifications Lack sufficient and/or appropriate experience Remuneration and employment conditions Location of job / post	Reduced productivity Loss of business to competitors Reputational damage to company Lack of innovation in developing new products or services Relationship problems among staff Quality of products and services reduced
(C) Other (Specify) 3	<input type="text"/>	Demanding working hours (shift work etc) Work permit or visa difficulties Equality considerations (race, gender and/or disability) Applicants' personality traits are not suited to the post or organisation. Do not know	Increase in operating costs Have difficulties introducing new work practices Outsourcing work to others negatively affecting company growth

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CATHSSETA

The CATHSSETA is conducting a job vacancy and skills shortage survey for the Gaming and Lotteries Industry.

The findings of this survey will feed into the Sector Skills Plan. This Workplace Survey will provide valuable information on the demand side of the labour market. It will collect information from CATHSSETA employers on hard-to-fill jobs and their impacts for employers, as well as current and future skills shortage vacancies in the economy.

Human resources professionals and employers will obtain unique insights into both the nature and extent of recruitment difficulties and skills shortages in the labour market as well as valuable information on industry training needs.

As the respondent, you will benefit from completing this questionnaire by having the ability to use the data to establish benchmarks for your company's labour dynamics.

The data reported on this questionnaire will be treated in strict confidence. We do not require your name or that of your company.

For technical assistance please call 011 867 0780 or for administrative support email info@tresearch.co.za.

Expected FUTURE Hard to Fill Vacancies

The purpose of this section is to identify HARD-TO-FILL VACANCIES (HTFVs) that your company EXPECTS TO HAVE IN THE NEXT 2 - 5 YEARS. HARD-TO-FILL VACANCY(HTFV) refers to an occupation in your company that takes longer than 6 months to find a suitable candidate.

Please examine the occupations listed. For each that you would classify as LIKELY TO BE hard to fill in your organisation IN THE FUTURE, indicate the reason and implications of this vacancy by selecting the most appropriate response from the dropdown boxes.

	8. What do you believe is the main reason for this vacancy to be hard to fill?	9. What are the implications of this vacancy being hard to fill?
(x) Director (Enterprise / Organisation)	-Select- -Select-	-Select- -Select-
(y) Small Business Manager	Lack of relevant qualifications Lack sufficient and/or appropriate experience Remuneration and employment conditions Location of job / post	Reduced productivity Loss of business to competitors Reputational damage to company Lack of innovation in developing new products or services Relationship problems among staff Quality of products and services reduced
(z) Office Manager	Demanding working hours (shift work etc) Work permit or visa difficulties	Increase in operating costs Have difficulties introducing new work practices Outsourcing work to others negatively affecting company growth
(A) General Manager	Equality considerations (race, gender and/or disability) Applicants' personality traits are not suited to the post or organisation. Do not know	
(B) Accountant (General)	-Select-	-Select-
(C) Economist	-Select-	-Select-
(D) Training and Development Professional	-Select-	-Select-
(E) Program / Project Administrators	-Select-	-Select-
(F) Gaming Manager	-Select-	-Select-
(G) Gaming Dealer	-Select-	-Select-
(H) Gaming Inspector	-Select-	-Select-
(I) Gaming Supervisor	-Select-	-Select-
(J) Gaming Pit Boss	-Select-	-Select-
(K) Gaming Table Operator	-Select-	-Select-
(L) Surveillance Manager	-Select-	-Select-
(M) Croupier	-Select-	-Select-
(N) Floor Supervisor	-Select-	-Select-
(O) Shift Managers	-Select-	-Select-
(P) Slots Manager	-Select-	-Select-
(Q) Electronic Equipment Mechanician	-Select-	-Select-
(R) Betting Agency Manager	-Select-	-Select-
(S) Bookmaker	-Select-	-Select-
(T) Bookmaker's Clerk	-Select-	-Select-

(x) Courier Clerk	-Select-	*	-Select-	*
(y) General Clerk	-Select-	*	-Select-	*
(z) Racing Manager	-Select-	*	-Select-	*
(aa) Trainer	-Select-	*	-Select-	*
(ab) Jockey	-Select-	*	-Select-	*
(ac) Handicapper	-Select-	*	-Select-	*
(ad) Stipendiary Steward	-Select-	*	-Select-	*
(ae) Lottery Manager	-Select-	*	-Select-	*
(af) Handyperson	-Select-	*	-Select-	*

If the occupations were not listed above, please specify the occupation that you expect to find hard to fill IN THE FUTURE, the reasons and the implications of the shortage.

	10. Occupation / Job Title	11. What do you believe is the main	12. What are the implications of this vacancy being hard to fill?
(a) Other (Specify) 1	<input type="text"/>	-Select- -Select-	-Select- -Select-
(b) Other (Specify) 2	<input type="text"/>	Lack of relevant qualifications Lack sufficient and/or appropriate experience Remuneration and employment conditions	Reduced productivity Loss of business to competitors Reputational damage to company
(c) Other (Specify) 3	<input type="text"/>	Location of job / post Demanding working hours (shift work etc) Work permit or visa difficulties Equity considerations (race, gender and/or disability) Applicants' personality traits are not suited to the post or organisation. Do not know	Lack of innovation in developing new products or services Relationship problems among staff Quality of products and services reduced Increase in operating costs Have difficulties introducing new work practices Outsourcing work to others Negatively affecting company growth

13. Any other comments relating to skills that are difficult to source?

Characters Remaining: 500

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APPENDIX B - CURRENT SKILLS SHORTAGES

Occupation	Lack of relevant qualifications	Lack sufficient and/or appropriate experience	Remuneration and employment conditions	Location of job / post	Demanding working hours (shift work etc.)	Equity considerations (race, gender and/or disability)	Applicants' personality traits are not suited to the post or organisation.	Do not know	Total	% respondents
Director (Enterprise / Organisation)	0	0	0	0	0	0	0	0	0	0%
Small Business Manager	0	0	0	0	0	0	0	0	0	0%
Office Manager	0	0	0	0	0	0	0	0	0	0%
General Manager	0	0	0	0	0	0	0	1	1	4%
Accountant (General)	0	0	0	0	0	0	0	0	0	0%
Economist	0	0	0	0	0	0	0	0	0	0%
Training and Development Professional	0	1	0	0	0	0	0	0	1	4%
Program / Project Administrators	0	1	0	0	0	0	0	0	1	4%
Gaming Manager	0	2	1	0	0	0	0	0	3	13%
Gaming Dealer	0	2	0	0	2	0	0	0	4	17%
Gaming Inspector	1	1	0	0	0	0	0	0	2	9%
Gaming Supervisor	0	1	0	0	0	0	0	0	1	4%
Gaming Pit Boss	0	1	0	0	0	0	0	0	1	4%
Gaming Table Operator	0	0	0	0	0	0	0	0	0	0%
Surveillance Manager	0	0	0	0	0	0	0	0	0	0%
Croupier	0	0	0	0	0	0	0	0	0	0%
Floor Supervisor	0	0	0	0	0	0	0	0	0	0%
Shift Managers	0	0	0	0	0	0	0	0	0	0%

Vacancy Analysis Survey (June 2016)

Occupation	Lack of relevant qualifications	Lack sufficient and/or appropriate experience	Remuneration and employment conditions	Location of job / post	Demanding working hours (shift work etc.)	Equity considerations (race, gender and/or disability)	Applicants' personality traits are not suited to the post or organisation.	Do not know	Total	% respondents
Slots Manager	0	0	0	0	0	0	0	0	0	0%
Electronic Equipment Mechanician	0	3	1	0	0	0	0	0	4	17%
Betting Agency Manager	1	1	0	0	0	0	0	0	2	9%
Bookmaker	1	1	0	0	0	0	0	0	2	9%
Bookmaker's Clerk	1	0	0	1	0	0	0	0	2	9%
Counter Clerk	0	0	0	0	0	0	0	0	0	0%
General Clerk	0	0	0	0	0	0	0	0	0	0%
Racing Manager	2	0	0	0	0	1	0	0	3	13%
Trainer	2	3	0	0	0	0	0	0	5	22%
Jockey	1	2	0	0	0	0	0	0	3	13%
Handicapper	3	2	0	0	0	0	0	0	3	13%
Stipendiary Steward	2	2	0	0	0	0	0	0	2	9%
Lottery Manager	0	0	0	0	0	0	0	0	0	0%
Handyperson	0	1	0	0	0	0	0	0	1	4%
Total	14	24	2	1	2	1	0	1	41	

Appendix C Future Skills Shortages

Occupation	Lack of relevant qualifications	Lack sufficient and/or appropriate experience	Remuneration and employment conditions	Location of job / post	Demanding working hours (shift work etc)	Equity considerations (race, gender and/or disability)	Applicants' personality traits are not suited to the post or organisation.	Do not know	Total	% respondents
Director (Enterprise / Organisation)	0	1	0	0	0	0	0	0	1	4%
Small Business Manager	0	0	0	0	0	0	0	0	0	0%
Office Manager	0	0	0	0	0	0	0	0	0	0%
General Manager	0	1	0	0	0	0	1	0	2	9%
Accountant (General)	0	0	0	0	0	0	0	0	0	0%
Economist	0	0	0	0	0	0	0	0	0	0%
Training and Development Professional	1	0	0	0	0	0	0	0	1	4%
Program / Project Administrators	0	0	0	0	0	0	0	0	0	0%
Gaming Manager	0	0	0	0	0	0	0	0	0	0%
Gaming Dealer	0	0	0	0	1	0	0	0	1	4%
Gaming Inspector	0	0	0	0	0	0	0	0	0	0%
Gaming Supervisor	0	0	0	0	0	0	0	0	0	0%
Gaming Pit Boss	0	0	0	0	0	0	0	0	0	0%
Gaming Table Operator	0	0	0	0	0	0	0	0	0	0%
Surveillance Manager	0	0	0	0	0	0	0	0	0	0%
Croupier	0	0	0	0	0	0	0	0	0	0%
Floor Supervisor	0	0	0	0	0	0	0	0	0	0%
Shift Managers	0	0	0	0	0	0	0	0	0	0%
Slots Manager	0	0	0	0	0	0	0	0	0	0%
Electronic Equipment Mechanician	0	0	1	0	0	0	0	0	1	4%
Betting Agency Manager	0	1	0	0	0	0	0	0	1	4%

Vacancy Analysis Survey (June 2016)

Occupation	Lack of relevant qualifications	Lack sufficient and/or appropriate experience	Remuneration and employment conditions	Location of job / post	Demanding working hours (shift work etc)	Equity considerations (race, gender and/or disability)	Applicants' personality traits are not suited to the post or organisation.	Do not know	Total	% respondents
Bookmaker	0	0	0	0	0	0	0	0	0	0%
Bookmaker's Clerk	0	0	0	0	0	0	0	0	0	0%
Counter Clerk	0	0	0	0	0	0	0	0	0	0%
General Clerk	0	0	0	0	0	0	0	0	0	0%
Racing Manager	0	0	0	0	0	0	0	0	0	0%
Trainer	0	2	0	0	0	0	0	0	2	9%
Jockey	0	2	0	0	0	0	0	0	2	9%
Handicapper	1	1	0	0	0	0	0	0	1	4%
Stipendiary Steward	1	1	0	0	0	0	0	0	1	4%
Lottery Manager	0	0	0	0	0	0	0	0	0	0%
Handyperson	1	1	0	0	0	0	0	0	2	9%
Total	4	10	1	0	1	0	1	0	15	