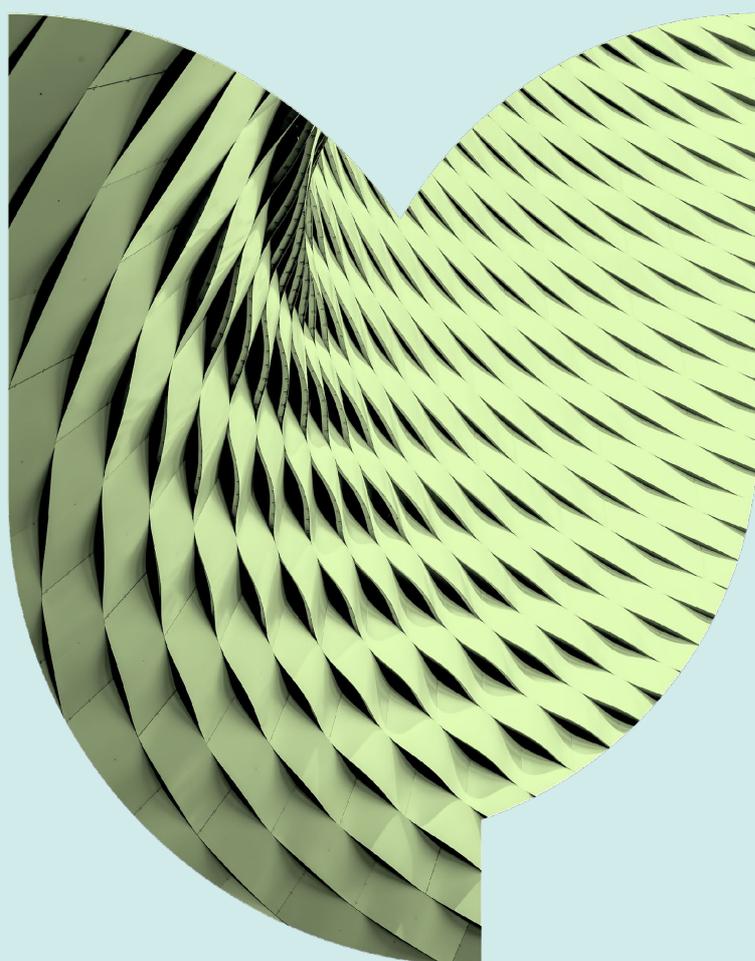




NATIONAL REPORT FRANCE

September 2022



Co-funded by
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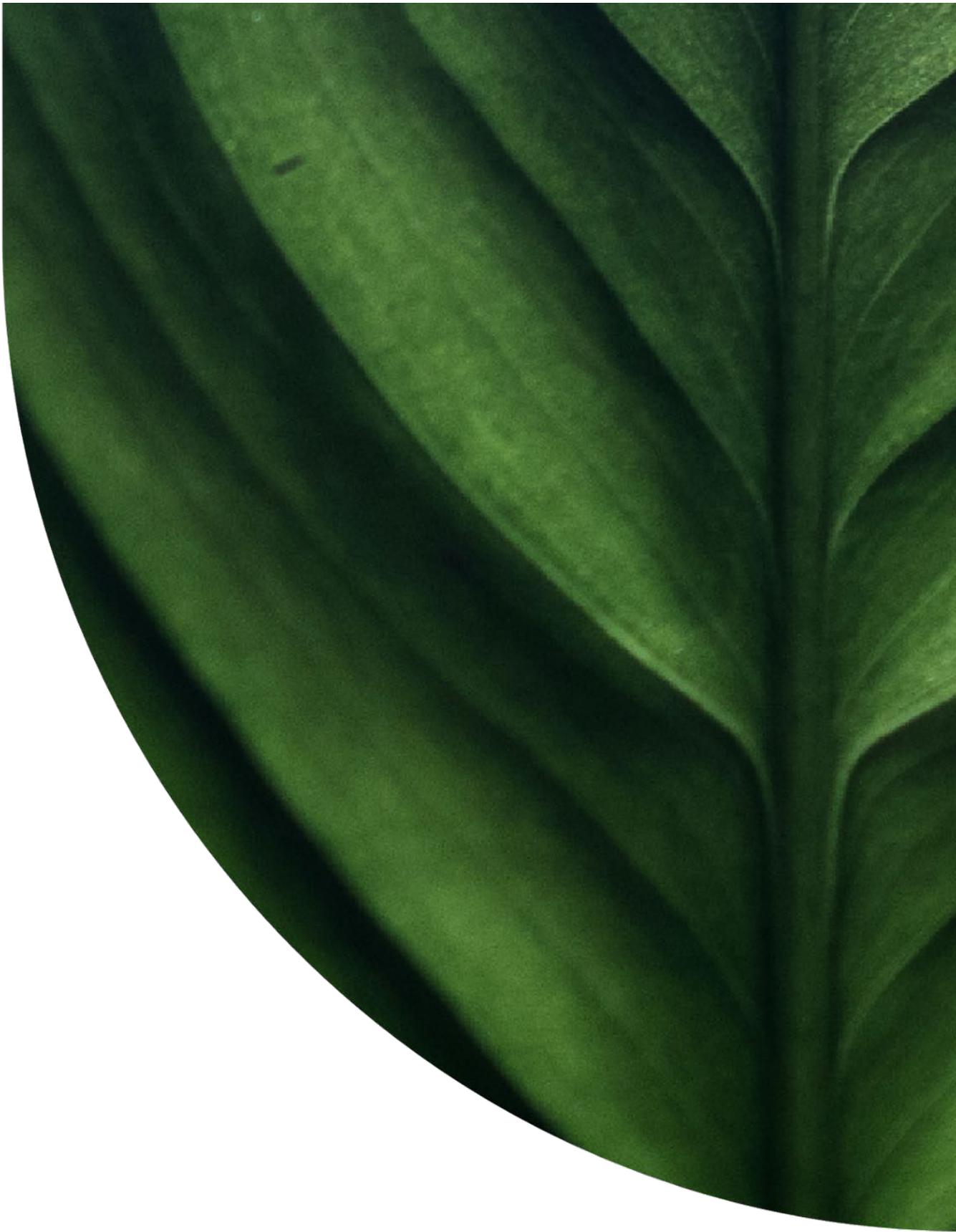


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1. Introduction

1.1 EcoSME Project

EcoSME is a project co-funded by the Erasmus Plus programme and which runs from November 2021 until May 2023. The project was developed to support hospitality SMEs with their green transition in the wake of the COVID-19 pandemic through the provision of flexible open-source multilingual training materials and tools informed by the EcoSME consultation in the five partner countries. The project partners recognise the global post-covid challenges being experienced within the hospitality sector but equally recognises the importance for development of sustainable futures within the sector by supporting the upskilling and reskilling of staff.

The project is being coordinated by the ATU (Atlantic University) in Ireland with its partners EURAKOM in Hauts-de-France (France), VSGT in Maribor (Slovenia), DOMSPAIN (Spain), the Polytechnic Institute of Viana do Castelo (Portugal) and Bia Innovator Campus CLG (Ireland).

This project aims to:

- Raise awareness of the multiple advantages of sustainable business management for SMEs.
- Raise awareness of the advantages of developing green skills for business, society, community and the environment.
- Support SMEs through their “green transition” with relevant training materials and resources.
- Encourage sustainable entrepreneurship.
- Enhance employability skills for individuals wishing to upskill or reskill in areas of sustainability.
- Expand the educational offering to academics, educators and trainers as well as educational providers to support industry needs.
- Build a network of sustainable hospitality businesses across the partner countries - the EcoSME network.

1.2 Introduction to the National Report

Hospitality and tourism schools and SMEs have confirmed a lack of availability of training for SMEs, in particular in the area of sustainability and that knowledge about the topic and its scope and impact on their work is very limited and patchy. The materials and training to be produced by the project offer elements tailored to its target audience and new developments in the industry that are currently not available

on the market and can make an important contribution to sustainable business development and helping SMEs prepare for a greener future, upskill staff and develop business opportunities

The country reports and comparative analytical report does not only serve as a basis for all subsequent project results but also has the aim to support local, regional,

national policy makers, vocational education, and higher education providers in order to highlight the importance to invest in CVET and particularly in the area of sustainability to strengthen the sector.

EURAKOM carried out an analysis, which confirms the need for more in depth knowledge about sustainability. However, more details about the current sustainability challenges and skills needs of SMEs and microbusinesses in the wake of the Covid-19 pandemic were needed to design a highly relevant and adequate training programme to successfully support the sector. Carrying out the consultation has ensured that the training programme is based on real challenges, concrete examples and tailored to participants' needs in the best possible way. The consultation has for example asked questions to find out in which areas SMEs have already made or envisaged to make changes and why; to give details about the challenges they are facing with the implementation of sustainability as a result of the pandemic; gained an understanding about how the pandemic has shifted the mindset of hospitality workers with regard to working in the industry; gained an understanding about the desire and willingness to implement sustainable practices; gained knowledge about their current level of understanding of sustainability and which areas they consider to be a priority to build and

develop resilience or relaunch a more sustainable business after the pandemic.

Overall, the consultation has been able to provide new evidence and information about which challenges persist as a result of the COVID-19 pandemic and inform subsequent project results to better serve the sector and build resilience of SMEs in the hospitality sector.

The partnership is open to collaborate with any additional region or country that wishes to carry out a survey or exchange about how the work was carried out.



1.3 State of Play in France

For more than 30 years, France has been the world's leading tourist destination. In 2019, 90 million foreign tourists came to discover the richness of the country's natural and architectural heritage and enjoy a world-renowned art of living and hospitality. In France, the tourism sector represents 8% of national wealth.

In France, the Ministry of Europe and Foreign Affairs and the Ministry of Economy and Finance manage tourism policy. The Prime Minister, during the Inter-ministerial Committee on Tourism, gives directives to the ministries and departments operating in tourism-related fields.

In addition, two national operators play a cardinal role in the implementation of tourism-related policies. "ATOOUT France" is responsible for promoting the destination abroad. It has the legal form of a group of economic interests and its budget is between 70 and 75 million euros. The second agency is the "National Agency for Holiday Vouchers" which aims to make holidays accessible to all.

Every French region must create a regional tourism committee and set up a regional tourism development. They must also collect data on tourism in order to coordinate public and private initiatives on tourism development, promotion, and information. The departments have the objective of defining tourism development plans following the indications of the regions. Finally, the municipalities have the possibility to create a tourist office whose function is to inform tourists and to market tourist services. (1)

Impact of the Covid-19 pandemic on the development of sustainable operations in the hospitality sector

In France, the first nationwide lockdown was announced in March 2020 and lasted until May. Although a second lockdown started in October 2020 and stopped any opportunities for a recovery of the tourism industry in 2020 (2). In France, tourism is a very important part of the economy as it represents around 10% of French GDP (including transport) and around 12% of jobs in 2019 (3). In 2020, during the phase of abrupt industry shutdown, the hospitality industry followed the fluctuations of the evolution of the COVID-19 epidemic and the implementation of the government's health measures. The year after Covid-19, the industry was still benefiting from the impact during the year 2019 for the hotel sector in terms of business activity, financial results and investments (4). During the first quarter of 2022, attendance at collective tourist accommodation excluding campsites in France, expressed in number of nights, was 11.3% lower than its level in the first quarter of 2019. Attendance was down 16.4% in hotels and 1.2% in other collective tourist accommodation (5). KPMG's study on the French hotel industry reported that in the first semester of 2020, international tourism receipts in France fell by -49.4%, and more than 90% of hotels remained closed during the lockdown (6). The COVID-19 pandemic also led to a considerable number of restaurants going out of business due to financial difficulties linked to temporary closures during the health crisis. However, many hospitality businesses managed to reinvent themselves and find innovative solutions to still provide services to their clients. EURAKOM is aware of a number of

examples of restaurant businesses in the Hauts-de-France region that were able to take advantage of the situation despite restaurant closures. This was possible for example by changing the type of their services and/or offering additional ones in collaboration with their suppliers and networks.

Despite a very good summer season in 2022, owners and managers of hospitality businesses still face several challenges. One of these challenges is the pay back of loans made by the state during the crisis (prêts garantis par l'Etat (PGE)). A survey carried out by UMIH (Union for trades and industry for hospitality) found that one in four businesses is not able to reimburse their loan (7).

Other challenges hospitality businesses are currently facing are linked to staff shortages which have led to businesses having to close on certain even or at the weekends. Overall, France has more than 200.000 posts in the sector, which have not been filled and is in need of around 400.000 seasonal workers (8).

Government measures and investments in sustainable operations

Announced on 2 June 2021 by the President of the French Republic, the French recovery plan aims to set a trajectory of 10 years for the tourism sector to bounce back after being hit particularly hard by the public health crisis. The plan aims to consolidate France's stable position as the world's number one tourist destination.

France has been the world's leading tourist destination for more than 30 years. In 2019, 90 million international tourists visited

France to discover the rich natural and architectural heritage and to enjoy its world-renowned hospitality and way of life. In France, tourism accounts for 8% of GDP (9).

France's recovery plan highlights tourism, along with the supports which are in place to cover wages in struggling sectors.

The tourism policy in France is decided inside the ministry of economy, finance and recovery inside a transversal strategic policy. This policy is divided in three main axes:

1. Improve the touristic offer and favour the access to vacation for a wider range of people

In the context of Hauts-de-France for example, the ministry sustains different associations through the DGE (the general directorate of enterprises) "Vacances & Familles" and "Vacances ouvertes" that aim to provide specific help for people with financial difficulties.

2. Reinforce the touristic valorisation of France's heritage and culture
3. Develop a sustainable tourism that is respectful for the environment (10)

In terms of sustainability, in addition to the support that the government provided to the tourism sector during the COVID-19 crisis, the above-mentioned ten-year plan "Destination France" was published in order to pursue the two following objectives: becoming the first destination for sustainable tourism and the first destination for bike tourism. Those ambitions are based on five main axes:

- 1) "Conquer and recover the talents":
The tourism enterprises face

difficulties in their recruitment, so the plan stated objectives to foster tourism jobs attractiveness, firstly by a reinforced coherence in order to make the training offers meet the requirements of local business needs, and in a secondly by restoring the attractiveness of tourism jobs, primarily to for example attract young people's interest by the mobility perspectives offered to them.

- 2) "Enhance the resilience of the sector and support the quality offer enhancement": in order to meet travellers' expectations, the Destination France plan aims to invest in the increment of the quality offer. The priority will be given in particular to the accommodation and food service sectors. The general objective being to match the new expectations of foreign as well as national tourists regarding the quality of their reception. The plan is also an occasion to enhance some sectors such as the business tourism and events sector, that are attractive but facing a lot of competition and are generally weakened as a result of the COVID-19 pandemic.
- 3) "Valorise and develop French touristic assets": The country has a rich heritage to valorise, especially

in relation to the rural tourism and sport and nature activities (report Rauscent). The overseas territories are also particularly important to take into consideration in that sense, as they are concentrating 80% of biodiversity. Based on the specificity of territories diversity, the plan aims to diversify the touristic offer and particularly around longer journeys development more based on experiential, itinerancy and discovery.

- 4) "Reply to the transformational stakes of the sector": the tourism industry transition towards a sustainable and responsible tourism: this responds to serve a growing demand for proximity distribution and experiential journeys. The infrastructural development needs to allow for attraction of tourism fluxes and in the meanwhile offer a high-quality experience.
- 5) Promote the Destination France: Destination France will aim to foster France's attractiveness and improve its image with regard to international tourists as well as national ones through promotion and communication in order to reinforce France as a destination reference. (11)



2. Methodology

2.1 EcoSME Consultation

The consultation in the different partner countries (Ireland, Slovenia, France, Spain and Portugal) have been targeted at owners of SMEs and microbusinesses as well as their staff who are in a managerial position. As mentioned previously, the target group of the consultation report are primarily local and national public authorities, governments, policy makers and sector representatives as well as networks and policy makers at EU level.

Since the hospitality and tourism sector has been impacted considerably by the Covid-19 pandemic, the questions have been tailored in a way to find out more about the current needs and skills gaps of SMEs and microbusinesses and their interest in developing more sustainable business management practices and overall operations.

The consultation was developed by EURAKOM with the support of all partners who have supported the development of the questionnaire and have led on the data collection in their respective countries. The partners used Survey Monkey for the questionnaire, which was disseminated in English, Spanish, French, Slovenian and Portuguese. Data was collected in various ways, namely through partner social media channels (LinkedIn, Twitter, Instagram and Facebook), newsletters and mailing lists, by visiting hospitality businesses and by phone. Partners reached out to their networks and sector representatives as well as various relevant associations in order to increase the number of respondents.

Respondents had the option to share their personal data in order to stay in touch with the project team and be informed about survey and project results in general but also in order to be able to benefit from the EcoSME training programme and the EcoSME Network to be set up during the course of the project.



However, respondents also had the option to remain anonymous. Data will be kept for a maximum of 5 years in accordance with Regulation 2016/679/EU known as the General Data Protection Regulation (GDPR).

All data linked to the individual respondents is handled by EURAKOM for the duration of the project and exclusively in the context of EcoSME. For the purpose of writing the national reports and for the purpose of local and regional stakeholder engagement in the context of EcoSME, partners are in possession of their respective national data sets.

2.2 Analysis

EURAKOM was in charge of setting up the consultation and sending the final data sets to the partners in the 5 participating countries. The analysis of the French data has resulted in the English version of this report which will subsequently also be translated into French and made available to a French speaking audience.

The national reports from the different partner countries will result in a comparative report prepared by EURAKOM. In France a total of 60 answers were collected.



3. Consultation results

3.1 Overview and Main Trends

The French survey results which mainly targeted SMEs in the Hauts-de-France and Paris regions saw a majority of respondents from the food and beverage sector, mainly restaurants (namely 75%). This has to be taken into account when looking at the priorities, challenges and needs highlighted as part of the consultation carried out. It also has to be considered that the majority of respondents, namely 77%, were owners from the age group of 40-59 years, the vast majority (almost 90%) from small or micro businesses. The majority of respondents are considering their understanding of sustainability either basic or intermediary, overall, 80% of all respondents fall into this category. Although the sample is small, the consultation confirms the assumption that smaller businesses run by owners/managers from the 40+ age group have mostly limited knowledge about sustainability.

The survey confirmed that the pandemic has had an impact on the awareness of SMEs of the need for more sustainable practices, in the case of the French consultation this mainly affects restaurants since most respondents belong to this category. The consultation results show that SMEs are mostly keen to improve the sustainable practices of their business and that the majority (81%) of respondents have at least taken some action, if not considerable action as a result of the pandemic. The findings are somewhat contradictory since on the one hand the majority of respondents only have basic knowledge about sustainability and on the other hand, they claim to have taken action to improve their sustainability record.

One of the questions focused on the choice of suppliers and the most important criteria for selection. SMEs, again we need to take into account that respondents were mainly linked to restaurants, are focusing primarily on sustainable packaging, waste/recycling and social responsibility. Overall, however, SMEs are taking a broad range of criteria into account. These criteria for selection can certainly be linked to the level of knowledge of the individual respondents about sustainability and possibly the ease of implementation or level of investment needed to make the necessary changes.

The majority of respondents replied that they are interested in upskilling/training staff to improve and develop sustainable practices, which is a main takeaway of the survey and confirms the relevance of the EcoSME training course and the need to work more closely with small and micro-sized hospitality businesses to support them with understanding the scope of sustainability and support the development of the relevant skills needed to implement the necessary and wishes for changes.

One of the main effects of the pandemic on the industry is the severe impact on staff availability and interest in working in the hospitality sector which is reflected all across Europe. In the context of the consultation, 37% of respondents pointed to staff shortages being the main concern, followed by the wish for a better work/life balance, which is one of the reasons for career changes away from the hospitality business as a result of the pandemic. Salary costs and operational costs also play an important role as a result of lost income and temporary closures of businesses during the pandemic.

When asked which areas their SME considers to be a priority, a majority of 56% responded energy efficiency, consumption

and management, 40% financial management, and 38% food waste. In this case further research would be needed since it can be expected that the priorities might slightly differ between restaurant and hotel businesses.

Although the consultation suggests that there is limited knowledge about sustainability overall, the majority believe that having a sustainability strategy in place will bring advantages for their business. Surprisingly, about half of respondents said they already had a sustainability strategy in place. However, there is no knowledge about the nature nor the content of these strategies.

In general, the Covid-19 pandemic has also led to some businesses turning their challenges into advantages. More than half of respondents said that they have benefited from some additional opportunities, even if they were minor in the case of about half of the respondents.

Despite the small sample in France, the consultation showed that the pandemic forced a majority of consulted businesses to look into changing or adapting their business model. In fact, EURAKOM is aware of a number of examples of restaurant businesses that managed to take advantage of the situation by changing their services and offering additional services in collaboration with their suppliers and networks to continue serving their customers despite restaurant closures.

Owners and managers do have a wish list of skills they would like their employees to acquire as part of their training. In general, the main skills they want to see developed are social and customer service skills including the ability to work in teams and collaborate effectively. Depending on the

position of the staff member within the business they also value technical skills needed to carry out tasks in a professional manner. Although green skills and digital skills were selected by some respondents, they are clearly not an immediate priority for the businesses that were consulted. This might be linked to unawareness about the potential overall benefit of improved green and digital skills for the business, including additional business opportunities. However, this is just an assumption that has not been confirmed in the context of our research.

An important aspect to take into account is that almost a third of SMEs indicated that there is not enough support to facilitate business sustainability, or they replied 'somewhat'. This shows that most likely more could be done to develop tailored support for SMEs in connection with the twin transition. Something, which is also fully in line with European strategies linked to the European Green Deal.

As previously mentioned, the Covid-19 pandemic has had a considerable impact on staff availability and especially on the availability of trained staff on the job market. It is not surprising that the majority of respondents say that it is very difficult to find the right candidates to fill positions after so many professionals turned their back on the hospitality industry as a result of the pandemic. It has been widely reported that staff currently available on the market are lower skilled and do not have sector specific qualifications. This has also been confirmed by the consultation, which points out the lack of technical skills as the main problem, followed by the attractiveness of the job, which is closely linked to low pay and long working hours that entail reduced work/life balance and overall well-being of employees.

The consultation also points to relatively low or medium levels of motivation of young graduates, however, it did not include any further questions that would allow for conclusions as to why, according to SME owners and managers, many young graduates are lacking motivation. The consultation also shows that the connections with the education sector could be improved since many do not have connections with the education sector and 20% would like to have better connections.

Based on the responses received, communication about sustainable practices can certainly be improved. Although some do communicate about them to some extent, SMEs do not seem to be aware of the benefits and full potential that clear and transparent communication about their operations can bring to their business.

As far as certification is concerned the consultation gives a clear indication that the majority of businesses are aware of the benefits of certification to demonstrate their sustainability efforts. Still, there are still businesses who do not know enough about certification and therefore certainly about the different options available to them and how to work towards becoming certified.

As for further training options of interest to the respondents the main interest in France lies in trainings related to communication, “Customer service and communication skills” or “Social Media and Communication channels training”, which is also in line with previous responses linked to the main skills that SME owners or managers would like to be part of their future employees’ training.

3.2 Consultation Questions and Answers

See ANNEX 1 for full consultation as it was communicated to respondents.

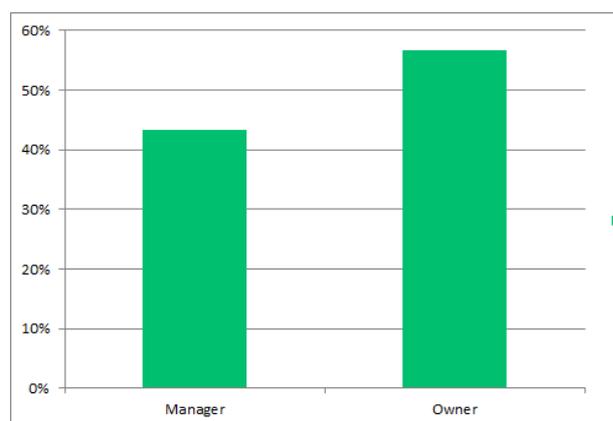
Question 1: The personal data supplied by me for the purpose of the ECOSME project will be maintained in a secure database administered by EURAKOM. I agree to receiving future relevant project information, invitations to meetings, invitations to participate in surveys and other communications related exclusively to the EcoSME project and the EcoSME Network.

On this question 52 were answered, and 8 were skipped.

About 57% of the respondents have authorised data sharing for the retention of their personal data in the EURAKOM database, and 48% have refused.

Question 2: I am responding to this consultation as a?

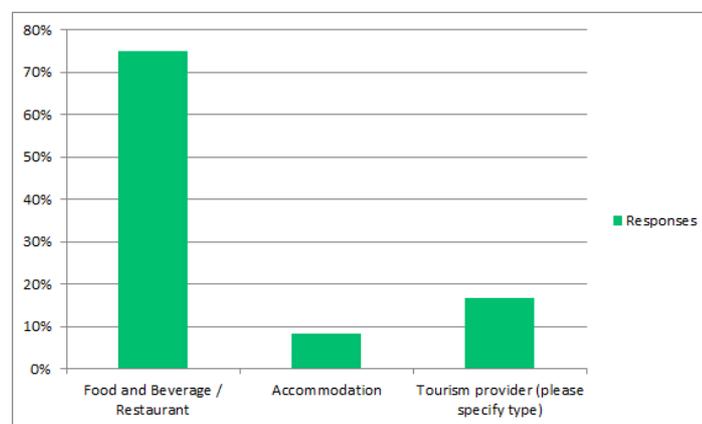
This question was mandatory.



About 57% are responding to the consultation as owners and 43% as managers.

Question 3: My SME is

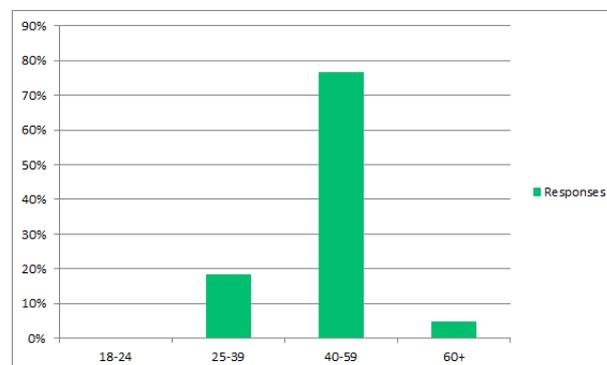
This question was mandatory.



A great majority of 75% of the SME are restaurants or food and beverage SMEs, and the other 20% are either accommodations or other types that provide services linked to both food and accommodation.

Question 4: Which age group do you belong to?

This question was mandatory.

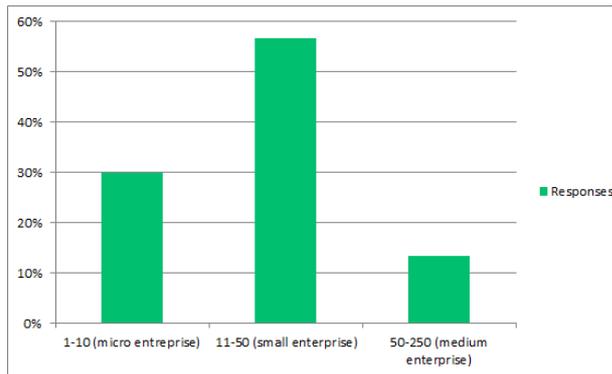


A great majority of 77% of respondents are in the 40-59 age group, and the remaining

respondents are in the 25-39 age group (17%) and in the 60 and + (5%).

Question 5: Your organisation size (full & part-time employees)

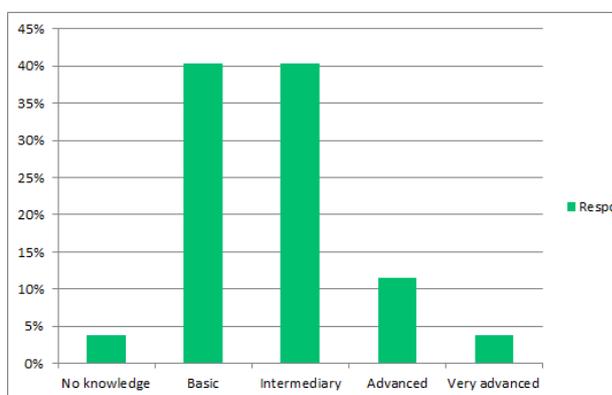
This question was mandatory.



When it comes to the size of organisations the respondents are linked to, 57% are linked to small enterprises, 30% to micro businesses and 13% medium-sized enterprises.

Question 6: How do you judge your current understanding of sustainability principles in a business context?

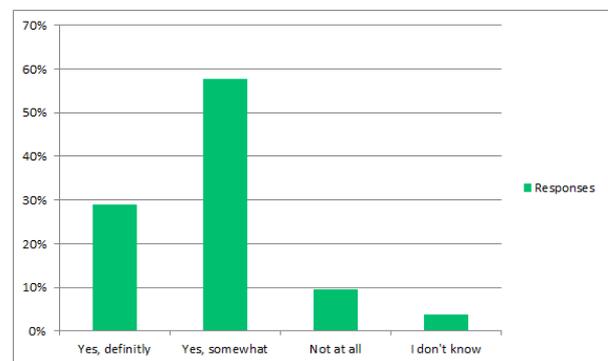
On this question 52 were answered, and 8 were skipped.



About 40% of the respondents are judging their current understanding of sustainability as basic, another 40% as intermediary. A lower rate of 12% is considering it as advanced and 4% as very advanced.

Question 7: Has the pandemic contributed to an increased awareness of the need for more sustainable business practices of your SME?

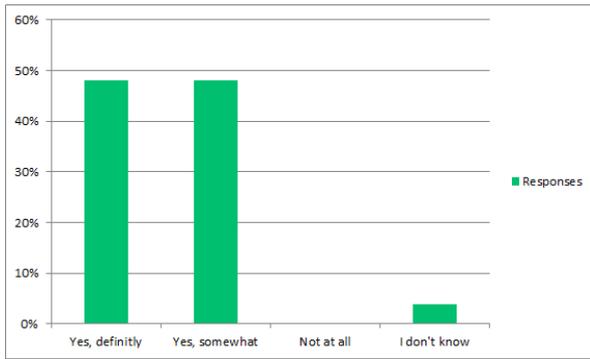
On this question 52 were answered, and 8 were skipped.



In general, it seems that most of the respondents are considering that the pandemic contributed to an increased awareness of the need for more sustainable business practices of their SME. However, the feelings varied: 58% of them felt that somewhat it did, and 29% gave a stronger response thinking it definitely did.

Question 8: As an SME, are you actively planning to make your business more sustainable?

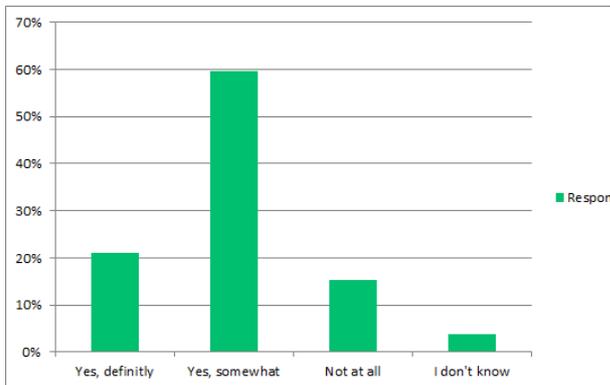
On this question 52 were answered, and 8 were skipped.



Most of the SMEs replied that they were somewhat or definitely planning to make their business more sustainable. The remaining 4% did not know if they were going to make their business more sustainable. No one chose the last response “not at all”.

Question 9: Has the pandemic led to the implementation of more sustainable practices for your SME?

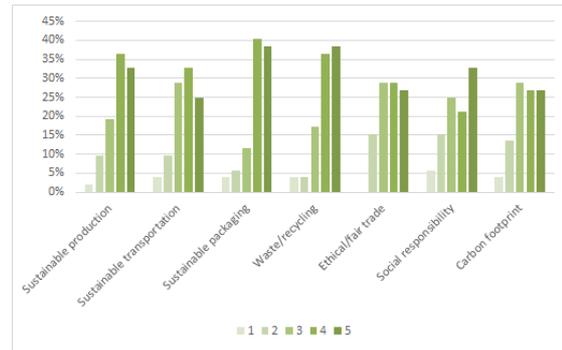
On this question 52 were answered, and 8 were skipped.



A majority of 60% of respondents indicated that the pandemic has somewhat led to the implementation of more sustainable practices for their SME, while 21% responded that it has definitely led them to do so. A lower rate of 15% responded “not at all” and 4% that they don’t know.

Question 10: Please rate the importance of the following in terms of how you choose your suppliers. (1-5 for each, 5 being the most important)

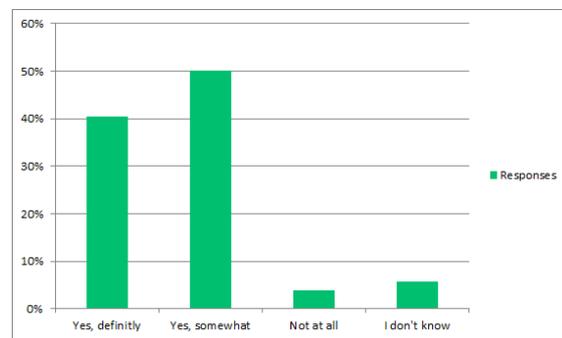
On this question 52 were answered, and 8 were skipped.



When it comes to the choice of suppliers, participants consider the following criteria, rating it 5/5, the most important: sustainable packaging (38% of the respondents), waste/recycling (38%), social responsibility (33%) and sustainable production (33%).

Question 11: Are you interested in upskilling/training staff to improve and develop sustainable practices?

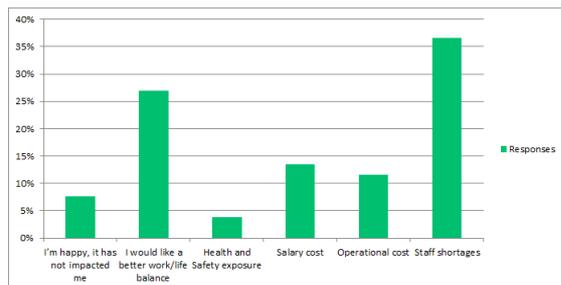
On this question 52 were answered, and 8 were skipped.



The majority of respondents replied that they are interested in upskilling/training staff to improve and develop sustainable practices.

Question 12: Has the pandemic impacted on your interest in working in the hospitality and tourism industry?

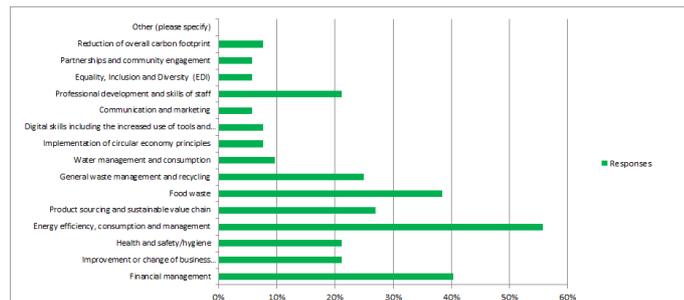
On this question 52 were answered, and 8 were skipped.



When asked if the pandemic impacted on their interest in working in the Hospitality and Tourism industry, 37% of the participants responded that the pandemic has led to staff shortages, 27% expressed that they would like to have a better work/life balance. For the remaining respondents, the pandemic had an impact on Salary cost (13%), Operational cost (12%) and no impact (8%). A low number of respondents evoked an impact on Health and Safety exposure (4%).

Question 13: Which of the following areas does your SME consider to be a priority in order to build and develop resilience or relaunch a more sustainable business after the pandemic. Taking environmental, economic, and social factors into account? (Select the 3 most relevant answers for your business)

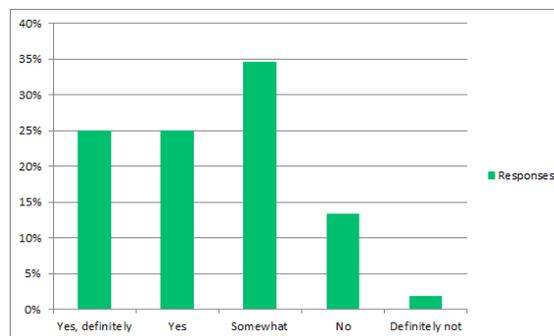
On this question 52 were answered, and 8 were skipped.



When asked which of the following areas does their SME consider to be a priority, a majority of 56% responded energy efficiency, consumption and management, 40% financial management, and 38% food waste.

Question 14: Are you aware of the advantages that a sustainability strategy can bring to your business?

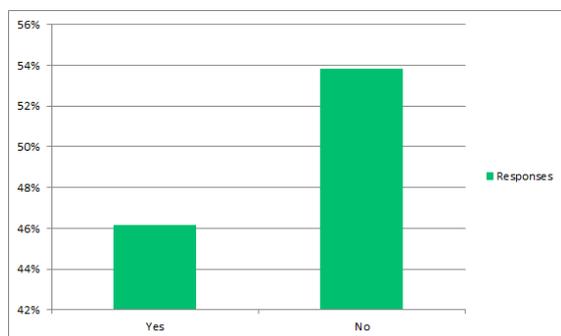
On this question 52 were answered, and 8 were skipped.



When asked if they were aware of the advantages that a sustainability strategy can bring to their business, 35% of respondents answered “somewhat”, while 25% answered “yes, definitely” and 25% answered “yes”. 15% were unaware of the advantages of a sustainability strategy for their SME.

Question 15: Do you already have a sustainability strategy in place?

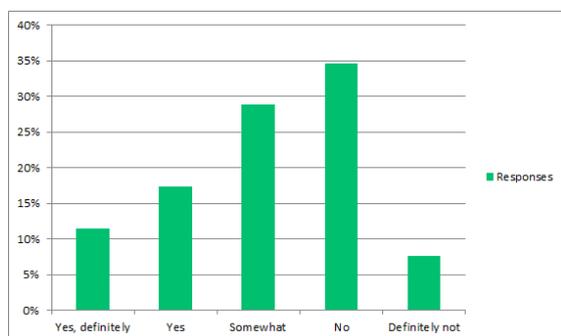
On this question 52 were answered, and 8 were skipped.



When asked if they already have a sustainability strategy in place, the results were relatively balanced between yes (46%) and no (54%).

Question 16: Have you been able to turn the challenge of the Covid-19 pandemic into an opportunity for your business?

On this question 52 were answered and 8 were skipped.



When asked if they have been able to turn the challenge of the Covid-19 pandemic into an opportunity for their business, 35% of the respondents replied “no”, 29% replied “somewhat” and only 17% and 12% replied “yes” and “yes, definitely” respectively.

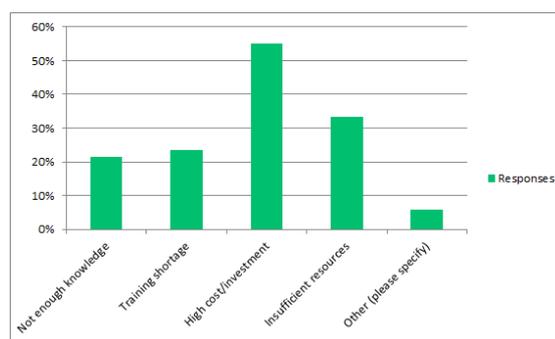
Question 17: If yes, how ?

On this question 17 were answered, and 43 were skipped.

For this question, the respondents mentioned that they were able to change the COVID situation challenge into an opportunity for their business through different ways. Some of them enjoy this period to reinforce their staff training or their development strategy, others mentioned that the situation led them to give a particular attention to waste of food and energy, and to give preference to local product utilisation.

Question 18: Which challenges, if any, do you face in the implementation of sustainability principles (possibly as a result of the pandemic)?

On this question 51 were answered, and 9 were skipped.

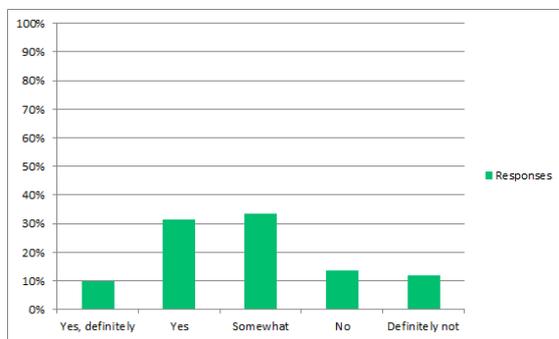


When asked which challenges the respondents faced within the implementation of sustainability principles, a majority of 55% replied that the high cost/investment was a main factor while

33% of respondents pointed to the insufficient resources and the rest of them to training shortages (24%) or lack of knowledge (22%).

Question 19: As a result of the pandemic, has your business looked into changing or adapting its business model?

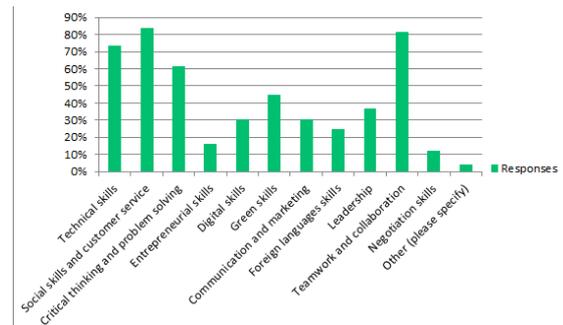
On this question 51 were answered, and 9 were skipped.



When asked if the pandemic forced their business to look into changing or adapting their business model, a majority of 74% replied yes, some of them more convinced than others: 33% declared “somewhat”, 31% declared “yes”, and 10% “yes, definitely”. On the contrary, 26% of the other respondents replied “No” or “definitely not”.

Question 20: What type of knowledge do you want your prospective employees to acquire as part of their training? (top 5 important ones)

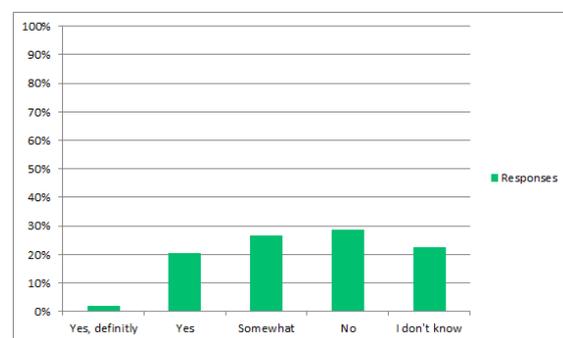
On this question 49 were answered and 11 were skipped.



To this question, 84% of the respondents answered, “Social skills and customer service”, 82% “Teamwork and collaboration”, 73% “Technical skills”, 61% “Critical thinking and problem solving”, and 45% “Green skills”. Instead, a lower percentage of 31% respondents replied, “digital skills”.

Question 21: Are there enough supports in your region/country to facilitate business sustainability?

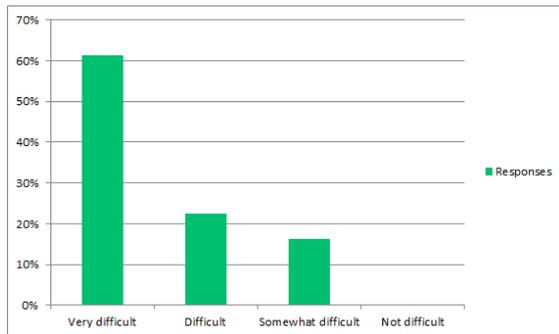
On this question 49 were answered, and 11 were skipped.



To this question, 29% of the respondents replied “no”, 27% “somewhat and 20% “yes”. The rest of the respondents (22%) replied that they do not know if there are enough supports to facilitate business sustainability in their region/country.

Question 22: What level of difficulty do you experience in finding the right candidates to fill positions? (with reference to skills, talents, knowledge, abilities)

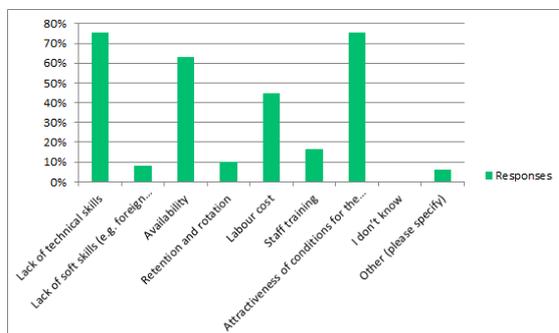
On this question 49 were answered, and 11 were skipped.



To this question, a great majority of 61% of the respondents replied that it was very difficult to find the right candidates to fill positions.

Question 23: What are the three main problems you face as part of the recruitment and retention process? (select the 3 main ones)

On this question 49 were answered and 11 were skipped.

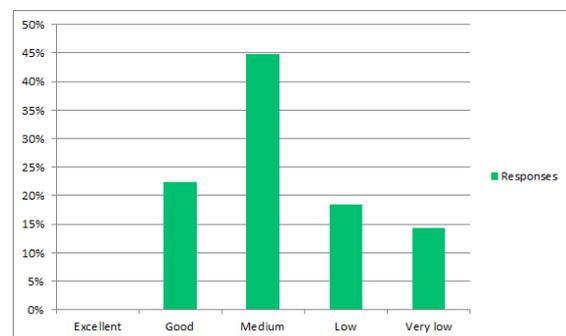


For this question, the three main problems mentioned by the respondents were “lack of technical skills” (76%) “attractiveness of conditions for the employee” (76%) and

“availability” (63%). Lack of skills and staff training was only mentioned by 16% and 10% of the respondents respectively as a main problem for recruitment and retention.

Question 24: How do you judge the overall skills level of young graduates?

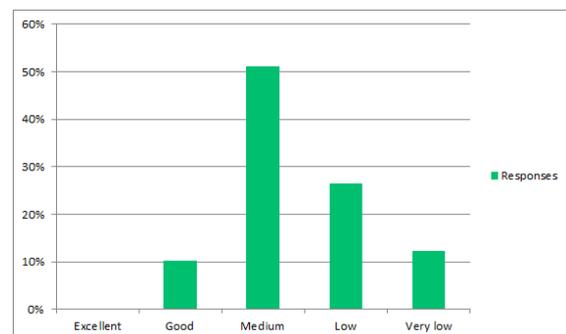
On this question 49 were answered and 11 were skipped.



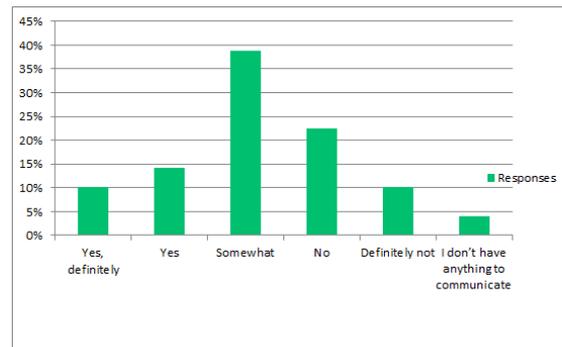
The respondents are judging the overall skills level of young graduates for 45% “medium”. The rest of them are judging it “good” (22%) or instead “low” (18%) or “very low” (14%).

Question 25: How do you feel about the overall level of motivation of young graduates?

On this question 49 were answered and 11 were skipped.

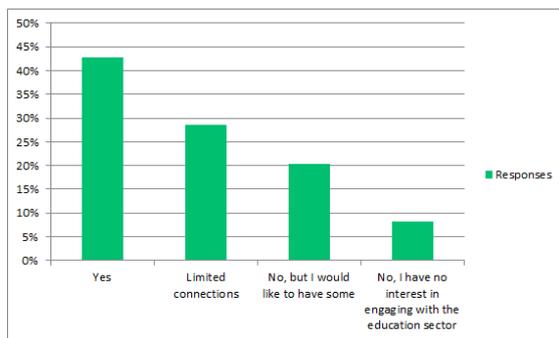


51% of respondents are considering the overall level of motivation of young graduates as “medium”, 27% as low and 12% as very low. Only 10% are considering the overall level of motivation of young graduates to be good.



Question 26: Do you have connections (at any level) with the education sector (for recruitment, training, knowledge exchange, educational programmes etc.)?

On this question 49 were answered, and 11 were skipped.



To this question, 43% of the respondents replied that they do have connections with the education sector. The rest of them replied that they have only limited connections (29%) or no connections, but that they would like to have some (20%).

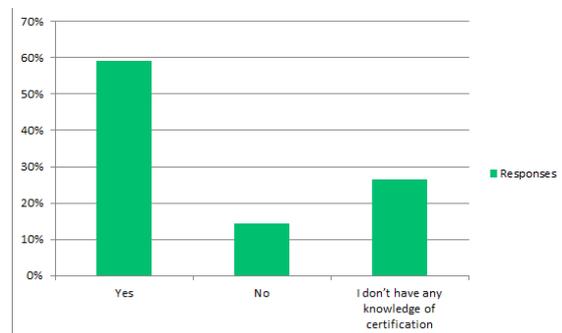
Question 27: Does your business actively communicate its sustainable practices?

On this question 49 were answered, and 11 were skipped.

To this question, 39% of the respondents replied “Somewhat” and 22% replied “No”. The rest of them replied “yes, definitely” (10%), “yes” (14%) or “definitely not” (10%).

Question 28: Are you interested in certification of your business in order to demonstrate your sustainability efforts?

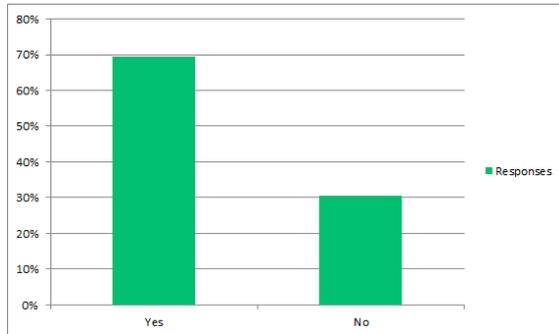
On this question 49 were answered, and 11 were skipped.



To this question, 59% replied that they were interested in certification of their business in order to demonstrate their sustainability efforts, while the 27% of them replied that they don't have any knowledge of certification, or that they are not interested (14%).

Question 29: Does your business have an equality, diversity and inclusion policy (EDI)?

On this question 49 were answered, and 11 were skipped.



To this question, 69% of the respondents replied that their business does have an EDI policy, and 31% replied that they do not.

Question 30: Among the following training options, apart from sustainable business management, which ones could your business and staff benefit from? (multiple answers possible)

On this question 47 were answered, and 13 were skipped.

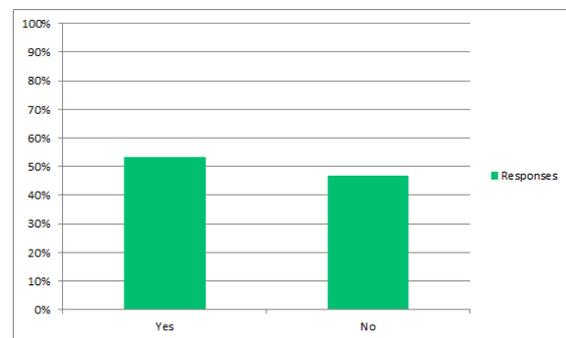


To this question, 51% of the respondents replied, “Customer service and communication skills”, 43% replied “Social Media and Communication channels training”, 38% “Food chain, nutrition and

dietary training” or another 38% of them “marketing and sales training”.

Question 31: Are you interested in joining the EcoSME network of stakeholders in order to network with other SMEs across Europe and exchange best practices about sustainable business management?

On this question 47 were answered, and 13 were skipped.



To this question, a majority replied yes (53%) and the other respondents replied no (47%) to joining the EcoSME network

Question 32: Personal Information (optional - to receive project updates, be invited to events and receive information about the EcoSME network)

On this question 22 were answered, and 38 were skipped.

A majority of the respondents skipped the question. The respondents that replied gave the following information for 100% of them: Name and Surname, Name of the organisation, Position within the organisation, City/Town, ZIP/Postal Code, Country, Email. 73% communicated their Phone Number.



4. Conclusions

4.1 Evaluation of consultation process

In France the consultation was carried out by promoting the online survey through e-mail, social media and through key industry representatives and networks. Despite the support and dissemination of the link by key players and networks within the industry, it was very challenging to increase the number of responses. SMEs said that they either did not have time or capacity to respond to the survey or that responding to the survey was not an immediate priority for them. Although EURAKOM presented the participation in EcoSME as an important opportunity for SMEs to gain additional sustainability skills and also be part of the EcoSME network in the long run, it proved difficult to convince SME owners and managers to invest time to answer all the questions.

4.2 Concluding Remarks

Overall, despite the small sample in France, the consultation has been able to provide new evidence and information about which challenges persist as a result of the COVID-19 pandemic and inform subsequent project results to better serve the sector and build resilience of SMEs in the hospitality sector.

The partnership is open to collaborate with any additional region or country that wishes to carry out a survey or exchange about how the work was carried out.

4.3 Limitations and suggestions for further research

The data collected as part of the consultation in France gives a glimpse of the needs of SME owners and managers regarding sustainability. Further research is needed to confirm the findings presented in this report. In terms of methodology a comprehensive and detailed strategy would need to be in place in order to ensure a sufficient data sample that could confirm the few trends identified as part of the French report.

Suggestions for further research include finding out about the types of support businesses need when it comes to business sustainability and also the reasons why young graduates are not sufficiently motivated to work in the hospitality industry. The consultation indicated that some businesses have taken action to improve their sustainability record as a result of the pandemic. Further research could be carried out to find out which actions SMEs have taken and why they have chosen to focus on these specific actions.



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(10) Document de politique transversale projet de loi de finances pour 2022, 2022, Politique du tourisme, ministre de l'économie, des finances et de la relance, république française.

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6. Annex

EcoSME

Business Sustainability Skills for SMEs in the Hospitality Sector

Consultation

Are you working for or managing an SME in the hospitality sector (food and beverage and accommodation) impacted by Covid-19? Are you interested in more sustainable business management practices and green skills for your business?

EcoSME is a project which will develop business sustainability skills of SME staff in the hospitality sector. This consultation aims at learning more about the current sustainability challenges and skills needs of SMEs and microbusinesses in the wake of the Covid-19 pandemic.

Who should participate in this consultation?

If you are an SME, a microbusiness, or a hospitality sector manager/owner and wish to help us better understand the challenges you are facing, you have until the 15th of June 2022 to participate in this consultation. All participants have the opportunity to join the EcoSME Network of hospitality SMEs which will allow for networking and the exchange of best practices on sustainable business management.

In answering this consultation you will help design a highly relevant and adequate training programme to successfully support the hospitality and tourism sectors to face today's sustainability challenges. The programme will be completely free of charge for you to access and participate in.

This consultation is led by EURAKOM (France) for the project EcoSME with its partners the Galway-Mayo Institute of Technology (GMIT) (Ireland) as the project coordinator, VSGT in Maribor (Slovenia), DOMSPAIN (Spain), the Polytechnic Institute of Viana do Castelo (Portugal) and Bia Innovator Campus CLG (Ireland).

You can contact EURAKOM for more information on this consultation in your country using uamattl@eurakom.eu. For general questions EURAKOM can be contacted in English or French research@eurakom.eu.

If you wish to participate actively in this project and generate a positive impact in your local community, destination or region in the areas of hospitality and tourism, we are looking forward to working with you.

This project is financed under the Erasmus + programme in the field of Vocational Education and Training.

Privacy settings & anonymisation of contributions

A summary of the results and responses to this questionnaire will be published. However, your contact details will remain anonymous. Only the type of respondent, the department and the content of the contribution will be published. Personal details (name, position, age range, name and size of the organisation) will not be published. If, however, you wish to participate actively in the initiative and EcoSME Network and/or be kept informed of the project's evolution, please leave your contact details at the end of this survey. In this case, the organising team will contact you by email. You can refuse to receive information at any time. Your data will be kept for a maximum of 5 years in accordance with Regulation 2016/679/EU known as the General Data Protection Regulation (GDPR).

Introductory Questions

1) The personal data supplied by me for the purpose of the ECOSME project will be maintained in a secure database administered by EURAKOM. I agree to receiving future relevant project information, invitations to meetings, invitations to participate in surveys and other communications related exclusively to the EcoSME project and the EcoSME Network.

- Yes
- No

2) I am responding to this consultation as a

- Manager
- Owner

3) My SME is

- Food and Beverage / Restaurant
- Accommodation
- Tourism Provider (please specify type)

4) Which age group do you belong to?

- 18-24
- 25-39
- 40-59
- 60 or older

5) Your organisation size (full & part-time employees)

- 1-10 (micro enterprise)
- 11-50 (small enterprise)
- 50-250 (medium enterprise)

Sustainable Business Concepts

Sustainability is most often defined as meeting the needs of the present without compromising the ability of future generations to meet theirs. It has four main pillars: economic, environmental, social and cultural. Sustainable business management refers to the management and coordination of environmental, social and financial demands and concerns to ensure responsible, ethical and ongoing success of a business. Linked to the industry, the United Nations World Tourism organisation defines sustainable tourism as tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.

6) How do you judge your current understanding of sustainability principles in a business context?

- No knowledge
- Basic
- Intermediary
- Advanced
- Very advanced

7) Has the pandemic contributed to an increased awareness of the need for more sustainable business practices of your SME?

- Yes, definitely
- Yes, somewhat
- Not at all
- I don't know

8) As an SME, are you actively planning to make your business more sustainable?

- Yes definitely
- Yes, somewhat
- Not at all
- I don't know

9) Has the pandemic led to the implementation of more sustainable practices for your SME?

- Yes definitely
- Yes, somewhat
- Not at all
- I don't know

10) Please rate the importance of the following in terms of how you choose your suppliers. (1-5 for each)

- Sustainable production
- Sustainable transportation
- Sustainable packaging
- Waste/recycling
- Ethical/fair trade

- Social responsibility
- Carbon footprint

11) Are you interested in upskilling/training staff to improve and develop sustainable practices?

- Yes, definitely
- Yes, somewhat
- No
- I don't know

12) Has the pandemic impacted on your interest in working in the hospitality and tourism industry?

- I'm happy, it has not impacted me
- I would like a better work/life balance
- Health and Safety exposure
- Salary cost
- Operational cost
- Staff shortages

13) Which of the following areas does your SME consider to be a priority in order to build and develop resilience or relaunch a more sustainable business after the pandemic. Taking environmental, economic and social factors into account? (Select the 3 most relevant answers for your business)

- Financial management
- Improvement or change of business strategy/business models
- Health and safety/hygiene
- Energy efficiency, consumption and management
- Product sourcing and sustainable value chain

- Food waste
- General waste management and recycling
- Water management and consumption
- Implementation of circular economy principles
- Digital skills including the increased use of tools and platforms
- Communication and marketing
- Professional development and skills of staff
- Equality, Inclusion and Diversity (EDI)
- Partnerships and community engagement
- Reduction of overall carbon footprint
- Other, please specify:

Challenges and Opportunities

Integrating sustainability principles into any business can be challenging but must also be recognised as a major opportunity for business, society and the planet.

14) Are you aware of the advantages that a sustainability strategy can bring to your business?

- Yes, definitely
- Yes
- Somewhat
- No
- Definitely not

15) Do you already have a sustainability strategy in place?

- Yes
- No

16) Have you been able to turn the challenge of the Covid-19 pandemic into an opportunity for your business?

- Yes, definitely
- Yes
- Somewhat
- No
- Definitely not

17) If yes, how?

- Open question

18) Which challenges, if any, do you face in the implementation of sustainability principles (possibly as a result of the pandemic)?

- Not enough knowledge
- Training shortage
- High cost/investment
- Insufficient resources
- Other (please specify)

19) As a result of the pandemic, has your business looked into changing or adapting its business model?

- Yes, definitely
- Yes
- Somewhat
- No
- Definitely not
- I don't know

(conditional) If you have a new business model, please give details:

The role of innovation, technology and strategy for sustainability

Innovation, digital skills and keeping up with new trends and opportunities are all essential elements for a sustainable and resilient business.

20) What type of knowledge do you want your prospective employees to acquire as part of their training? (top 5 important ones)

- Technical skills
- Social skills and customer service
- Critical thinking and problem solving
- Entrepreneurial skills
- Digital skills
- Green skills
- Communication and marketing
- Foreign languages skills
- Leadership
- Teamwork and collaboration
- Negotiation skills
- Other, please specify

21) Are there enough supports in your region/country to facilitate business sustainability?

- Yes, definitely
- Yes
- Somewhat
- No
- Definitely not
- I don't know

22) What level of difficulty do you experience in finding the right candidates to fill positions?
(with reference to skills, talents, knowledge, abilities)

- Very difficult
- Difficult
- Somewhat difficult
- Not difficult

23) What are the three main problems you face as part of the recruitment and retention process? (select the 3 main ones)

- Lack of technical skills
- Lack of soft skills (e.g., foreign language)
- Availability
- Retention and rotation
- Labour cost
- Staff training
- Attractiveness of conditions for the employee
- Other (please specify)
- I don't know

24) How do you judge the overall skills level of young graduates?

- Excellent
- Good
- Medium
- Low
- Very low

25) How do you feel about the overall level of motivation of young graduates?

- Excellent
- Good
- Medium
- Low
- Very low

Partnerships and collaborations

Partnerships and collaborations are at the heart of developing a more sustainable business. SMEs are part of a complex ecosystem of stakeholders, but they rarely exploit all their opportunities for collaboration beyond their existing networks.

26) Do you have connections (at any level) with the education sector (for recruitment, training, knowledge exchange, educational programmes etc.)?

- Yes
- Limited connections
- No, but I would like to have some
- No, I have no interest in engaging with the education sector

Communication and Marketing

A green and sustainable business is good for any SME's image as long as it is authentic, strategically thought out so that SMEs cannot be accused of greenwashing.

27) Does your business actively communicate its sustainable practices?

- Yes, definitely
- Yes
- Somewhat
- No
- Definitely not

- I don't have anything to communicate

28) Are you interested in certification of your business in order to demonstrate your sustainability efforts?

- Yes
- No
- I don't have any knowledge of certification

29) Does your business have an equality, diversity and inclusion policy (EDI)?

- Yes
- No

Concluding questions

30) Among the following training options, apart from sustainable business management, which ones could your business and staff benefit from? (multiple answers possible)

- Food chain, nutrition and dietary training
- Marketing and sales training
- Social Media and Communication channels training
- Human resources management training
- Training related to product innovation and / or tourism and hospitality in general
- Customer service and communication skills
- Entrepreneurship
- Digital skills, tools and platforms
- Health and wellbeing
- EDI (equality, diversity and inclusion) training
- Unconscious bias training
- Sustainable (Green) procurement training

- Stakeholder and community engagement training
- Other (please specify)

31) Are you interested in joining the EcoSME network of stakeholders in order to network with other SMEs across Europe and exchange best practices about sustainable business management?

- Yes
- No

32) Personal Information (optional - to receive project updates, be invited to events and receive information about the EcoSME network)

Surname and First Name (will not be published)

Email (will not be published)

Telephone number (only published if you wish to be contacted for the organisation of events, not published)

- Surname
- First name
- Name of the organisation
- Position within the organisation
- City
- Zip code
- Email
- Telephone number

Would you like to add any comments or suggestions with regards to the current (training) needs or challenges of SMEs in the hospitality sector or make suggestions for the content of the training programme? Has your business implemented good practices that we can highlight

and feature as part of the training and project at European level? Please leave a comment here or contact us at research@eurakom.eu.

Thank you for having taken the time to answer this consultation and for your participation and support in making hospitality more sustainable.

Thank you for your contribution!

Partners



Ollscoil
Teicneolaíochta
an Ailantaigh

Atlantic
Technological
University

VIŠJA STROKOVNA
ŠOLA ZA GOSTINSTVO
IN TURIZEM MARIBOR



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