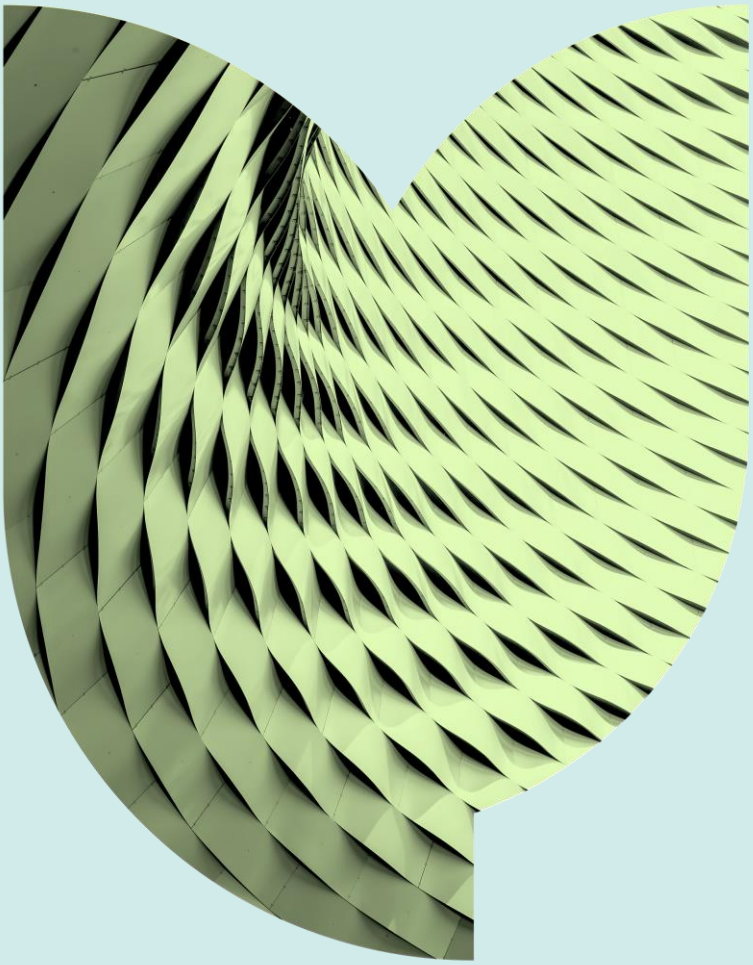
EcoSME

NATIONAL REPORT PORTUGAL

May 2022



Co-funded by
the European Union

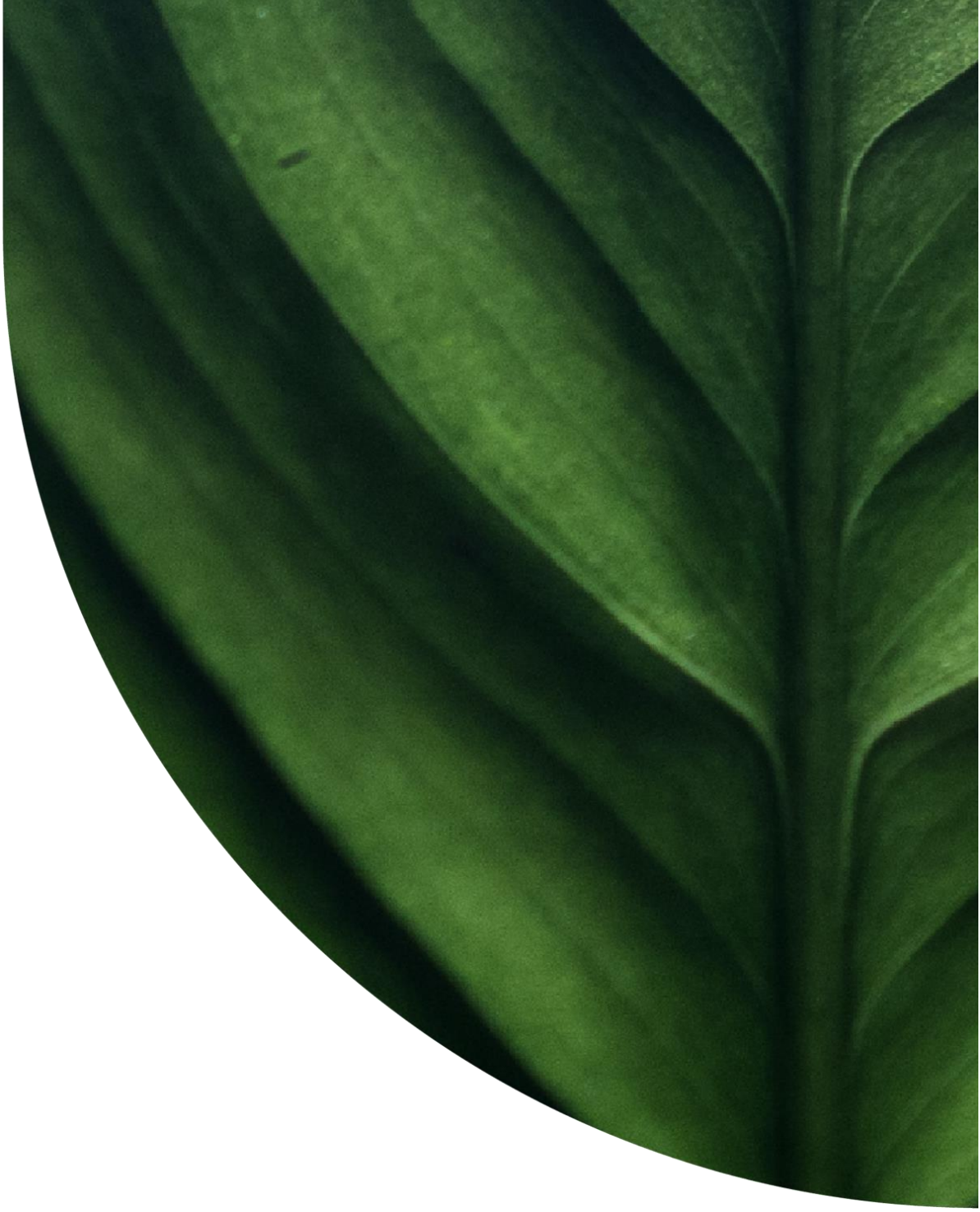
Instituto Politécnico
de Viana do Castelo

Editor in Chief: Carmen López
Contributors: Goretti Silva, Carlos Fernandes, Mariana Oliveira
Report Design: Rachael Simcox (EURAKOM)
Survey Design: EURAKOM
Survey and Report Translation to Portuguese: Carmen López, Carlos Fernandes, Goretti Silva, Alexandra Correia, Mariana Oliveira

Co-funded by
the European Union

Grant Agreement Nr. 2021-1-IE01-KA220-VET-000025089

Table of Contents



1. Introduction

1.1 EcoSME Project

The EcoSME project aims to support hospitality SME's on their sustainability journey, through the provision of flexible open source multilingual training tools informed by stakeholder research. 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.

This project aims to:

- Raise awareness of the advantages of sustainable business management;
- Raise awareness of the advantages of developing green skills for business, society, community and the environment;
- Support SME's through their "green transition" with relevant training tools;
- Encourage sustainable entrepreneurship;
- Enhance employability skills for individuals wishing to upskill or reskill in areas of sustainability;
- Expand the educational offering to academics/educational providers to support an industry needs;
- Build a network of sustainable hospitality businesses across the partner countries.

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 in 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 Portugal

Tourism plays a vital role in the Portuguese economy, as the country's main export activity and a generator of employment and wealth. In the last nine years, Portugal has registered an average annual growth rate of 7.2% in overnight stays, which translates into an increase from 37 million overnight stays in 2010 to 70 million overnight stays in 2019, the highest value on record. Tourism revenue has also seen an average annual growth rate of 10.3% over the last nine years, which has increased from 7.6 billion in 2010 to 18.4 billion in 2019 (Turismo de Portugal, n.d.).

According to data from the Tourism Satellite Account, released by the Instituto Nacional de Estatística (INE - Statistics Portugal), in 2019 tourism demand (Tourism Consumption in the Economic Territory) was equivalent to 15.3% of the Gross Domestic Product (GDP), increasing 8.1% compared to 2018 (15.3% of the GDP). In 2020, tourism consumption was estimated to represent 8.0% of the GDP, the lowest value since 2000 (INE, I. P).

In 2021, still suffering the effects of the pandemic, Portugal registered a slight recovery in demand, of 37.4 million overnight stays (+45.2%) in tourist accommodation compared to 2020. However, figures still account for 53% of 2019 results. International demand increased to a greater extent, with 18.7 million overnight stays (+52.9%), which represented 6.4 million additional overnight stays in tourist accommodation when compared to 2020. However, the domestic market shows signs of recovery with levels close to those in 2019. In 2021, the domestic market accounted for 50.2% of total overnight stays in tourist accommodation, which translates into 18.8 million overnight stays (-10.9% compared to 2019). In revenue, the increase recorded (+28.9%) compared to 2020 meant an increase of €2.2 billion for the economy in 2021 (Turismo de Portugal, n.d.).

In Portugal, the collection, treatment, and dissemination of official information about Tourism is under the responsibility of Instituto Nacional de Estatística (INE), alongside Turismo de Portugal. Besides INE procedures and surveys, Turismo de Portugal (TdP), the National Tourist Authority, responsible for the promotion, enhancement, and sustainable development of tourism plays a prominent role in the setting of policies and monitoring having developed a set of sustainability monitoring indicators, aligned with UNWTO's International Observatory Network (INSTO) strategy, the Commission European Union set of indicators (ETIS) and Global Sustainable Tourism Council (GSTC) (Turismo de Portugal, 2020).

Most of the indicators are based on information provided by INE or through inquiries promoted by TdP to tourism businesses, mostly accommodation units, as is the example of environmental certifications and "green" behaviour as water and energy saving (Pardo, Silva, & Paiva, 2021)

In Portugal, sustainability policies have been incorporated into the Tourism Strategy 2027, the benchmark for the development of public policies and business strategies in the tourism sector for the forthcoming decade. This Strategy is based on the affirmation of "Tourism as a hub for economic, social and environmental development throughout the territory, positioning Portugal as one of the most competitive and sustainable tourist destinations in the world" and on eight

strategic goals of economic, social and environmental sustainability: 1) To increase tourism demand in the country and the regions; 2) To grow at a faster rate in revenue than in overnight stays; 3) To extend tourism activity throughout the year; 4) To increase the qualifications of the population employed in tourism; 5) To ensure that tourism activity generates a positive impact on resident populations; 6) To increase energy efficiency levels in tourism companies; 7) To promote rational management of water resources in tourism; 8) And to promote efficient waste management in national tourism activity.

Therefore, this strategic reference for the next 10 years of tourism in our country explicitly has sustainability as a guiding principle and defines ambitious objectives and goals to be achieved in the three dimensions of sustainability: Economic: overnight stays and revenues from international tourism; Social: qualification of the sector's labour force, seasonality and satisfaction of residents with the tourism development process; Environmental: efficient management of water, energy and waste.

In this framework, Turismo de Portugal has developed a set of sustainability monitoring indicators, based on recommendations from international organisations (WTO, Eurostat), in order to assess the performance of Destination Portugal in the three dimensions of sustainability.

More recently, in 2020, in the area of sustainability, in addition to the destination's performance indicators, several internal projects were developed (sustainability report and promotion of the internal sustainability group) and external partnerships were expanded, both in the field of knowledge production and in terms of promotion of good environmental practices. At the international level, Turismo de Portugal leads, through the DGC, the OECD Tourism Committee, and the Market Intelligence Group of the ETC and has been playing a leading role in the WTO, participating in relevant working groups regarding the development of tourism statistics and the measurement of sustainability (Turismo de Portugal, I.P., 2021). In the latter case, it should be noted that three observatories of sustainable tourism (out of 5) were recognised by INSTO, reinforcing Portugal's leadership in this area.

Monitor sustainability metrics is one of the fundamental axes of tourism policy with a focus on ensuring continuous monitoring through a broad and stable framework of indicators and ensuring the dissemination of results. Thus, the goal for the coming years is to reinforce the network of Regional Observatories of Sustainability integrated into the INSTO. In addition, other initiatives have also been implemented at regional and local levels, with some regions adopting alternative labels and classifications such as the European Charter for Sustainable Tourism (Europarc), and Green Destinations among others.

The pandemic (COVID-19) had a negative impact on the economy and society. However, a responsible recovery of the sector, based on sustainability, will allow resilience in the face of future crises, promoting the resumption of tourism activity aiming at doing better and with greater security from the economic, social and environmental points of view. This challenge requires the commitment of a close articulation and integration of the whole community of Tourism stakeholders, both private and public bodies, at national, regional and local levels. The recent accession of Turismo de Portugal to the Global Sustainable Tourism Council (GSTC), in October 2020, and the Portuguese Plastics Pact (PPP), in addition to active participation in the World Travel & Tourism Council (WTTC) and the

European Travel Commission (ETC) reflect the commitment to intervene and support initiatives that strengthen the role of tourism in building a better world for all (Turismo de Portugal, n.d.).

During the pandemic, the efforts of Turismo de Portugal were visible, adapting the promotion and communication of Portugal; providing various lines of support; creating the "Clean & Safe" seal and respective training; and preparing guidelines and collections of good practices, taking into consideration the DGS guidelines for the various sectors. One of these guides is, for example, the launching of 11 Good Practices Guides for a circular and sustainable tourism sector, which aims to be useful tools for entrepreneurs, encouraging a change in attitudes and the adoption of sustainable practices, and demonstrating through practical examples, how it is possible to make the businesses more sustainable, with greater economic and environmental benefits. This document brings together a set of good practices and examples which aim to alert *catering* and similar establishments to the urgent commitment to preserve the planet and its resources.

According to Malheiro et. al (2020), two (Portuguese) examples (best practices) of sustainability in communication, particularly in combating the COVID-19 in specific contexts of hospitality and tourism were the “There will be time” campaign and the “Clean & Safe” seal. These initiatives are aligned with the Portugal 2030 strategy, a governmental action programme that includes the plans for recovery and development of the economy, society and the national territory for the next decade, in convergence with the European Union. Framed by the Portugal 2030 Strategy, and given the effects caused by the pandemic, the Government designed a Recovery and Resilience Plan (PRR), based on the European Commission's Recovery and Resilience Mechanism, setting the road maps to ensure the recovery from the pandemic crisis and ensure a resilient future for Portugal. This Plan is structured in three dimensions, Resilience, Climate Transition and Digital Transition.

As part of this strategy, the action plan “Reactivate Tourism | Build the Future” was launched, aiming to be a guideline for the tourism sector, both public and private, thus ensuring a concerted strategy for the recovery of the national economy. The Plan sets four pillars of action – supporting businesses, fostering security, generating business and building the future – and consists of specific actions that, in the short, medium and long term, will transform the sector and will position it at a higher level of value creation, contributing significantly to GDP growth and a fairer distribution of wealth.

Resulting from the recovery plan “Reactivate Tourism | Building the Future” and aligned with the objectives of the Tourism Strategy 2027, the +Sustainable Tourism Plan 20-23 is a strategic, participatory, dynamic, wide-ranging, and creative framework through which Turismo de Portugal assumes the responsibility for mobilising stakeholders and society to promote sustainable Tourism in Portugal by 2023. It aims to contribute to position Portugal as one of the most competitive, safe, and sustainable tourist destinations in the world through economic, social and environmental development throughout the territory.
The +Sustainable Tourism Plan 20-23 was structured around 6 guiding principles:

- Act with a focus on the 17 Sustainable Development Goals (SDGs) of the United Nations;
- Act to minimise the impact of climate change;

- Align with the agenda for the circular economy and promote climate transition;
- Involve the sector's stakeholders in a joint commitment;
- Contribute to achieving the Tourism Strategy 2027 targets;
- Align with the UNWTO vision for a responsible recovery of the tourism sector, after the COVID-19 crisis.

And the following targets by 2023:

- 75% of tourism developments with energy, water and waste management efficiency systems;
- 75% of tourist resorts do not use Single-Use Plastics;
- 25,000 adherents to the Clean & Safe Seal and 30,000 professionals trained; and 50,000 professionals trained in the areas of sustainability.

An important organization within this context is NEST - Tourism Innovation Center, which provides a free sustainability diagnosis tool for small and medium-sized enterprises (SMEs) in the tourism sector (accommodation, travel agencies, tourist entertainment agents, event organizations, rural tourism, and camping parks, among others). It aims to assess the carbon footprint of SMEs in the sector, raise their awareness and indicate points of improvement that can bring more efficiency and cost reduction. The T+ tool, developed around the most relevant sustainability issues for the Tourism sector, encompasses useful information, curiosities, and good practices on the topic of sustainability in the sector. It is divided into eight pillars of sustainability: Management and communication; Value chain; Energy; Water; Waste; Biodiversity; Community and inclusion; Culture and heritage. Each pillar has a set of questions to collect qualitative and quantitative information that will allow the assessment of the SME's performance in environmental, social and cultural aspects (NEST, n.d.).

Certification

According to Font (2002), there is no regulation to limit which tourism, hospitality and ecotourism businesses self-declare themselves as being sustainable, green, environmentally friendly, eco-friendly and so on. Increasingly there has been a proliferation of voluntary schemes setting up guidelines for good practice, and methods to recognise those companies meeting such standards.

According to Dias (2017), in Portugal, certification in hospitality is growing, however, there is still a notable lack of interest, regarding quality management systems, compared to other activity sectors. The phenomenon occurs more in hotel units with high categories or integrated into larger chains. SMEs do not have the same access and opportunities to adhere to a management system and its certification, often because they do not have qualified human resources to manage such a task, as well as more financial difficulties. Commonly, they are motivated to adhere to a Quality Management System (QMS) through funding sources, such as some European funds.
The main motivations identified by hotel managers for the implementation of the management system were customer focus, continuous improvement and environmental awareness. It is also notable and recognised the numerous contributions that a management system may have in an organisation, in this case in the hotel sector, such as the standardisation of procedures, cost reduction, optimisation of human resources, recognition by customers and improvement of image. The subsequent certification, in the hotel industry, shows results mainly on the external image and is

used more as a marketing strategy to attract customers and also tour operators who demand it before a possible partnership.

According to Font (2002), the lack of methods to enforce sustainable management and regulate green messages in tourism has led to an increasing number of voluntary initiatives in the form of codes of conduct, manuals, awards and ecolabels. There are too many ecolabels, with different meanings, criteria, geographical scope, confusing messages, limited expertise and expensive systems, only partly meeting the requirements of the compliance assessment process. These rely on governmental funding and start-up aid from NGOs, and the nature of most of these labels restricts their ability to grow beyond the narrow target groups for which they were created.

In Portugal, some of the most requested labels oriented towards tourism or that can be used in tourism activity are European Union Ecolabel; Green-Key; The Green Globe Company; The Leading Hotels of the World (Costa, 2011); Portugal Sou Eu and TUR4all. Examples of certification entities are Biosphere, Green Key, EMAS and Travelife. All develop private and voluntary certification systems based on the principles of sustainability to promote continuous improvement. These accrediting bodies offer establishments the opportunity to design not only products but also services that are not so aggressive to tourism while meeting the needs of their customers through compliance with requirements.

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

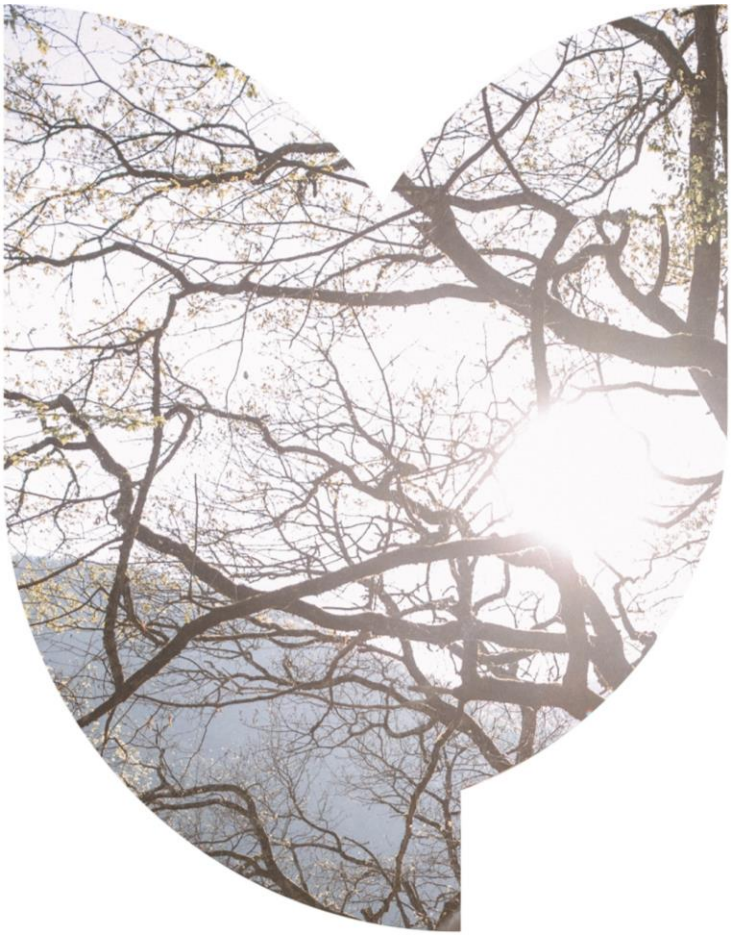
survey and project results in general but also in order to be able to benefit from the EcoSME training programme and the EcoSME Network to be set up during the course of the project. However, respondents also had the option to remain anonymous. Data will be kept for a maximum of 5 years in accordance 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

Each partner analysed their national data and prepared the national reports for the different countries in English.

The presentation and analyses of both qualitative and quantitative data, based on the data collected and reported in five national reports (i.e., one national report in each of the 5 EU countries), will be presented in a Comparative Report.



3. Consultation Results

3.1 Overview and Main Trends

IPVC administered the survey between 21st February 2022 and 21st March 2022, obtaining 128 answers. Throughout the survey, the number of answers decreased, with 15 to 36 respondents, because it was not made compulsory to answer.

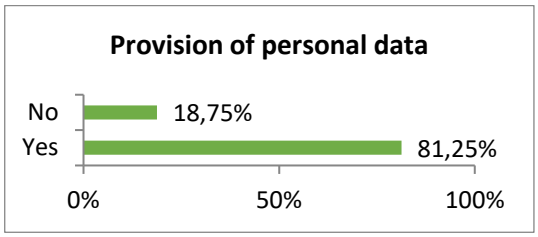
The data collection was done either in person by a group of students of the IPVC Tourism Degree or by phone. In addition, the survey was sent by email to SMEs in the hospitality sector (food and beverage and accommodation) but also to associations. IPVC has been in contact with several national and regional stakeholders to engage them in the project, the dissemination of its existence through their associates, but overall, the identification of good practices to be analysed and the answer to the survey. The survey was also disseminated through social media.

In the dissemination/distribution of the survey, students of the Tourism degree were involved in the scope of the curricular unit "Project in Tourism", where students are encouraged to collaborate in research and service provision to the community, for instance, by carrying out work with "real" promoters and application, in a project-based learning format.

3.2 Consultation Questions and Answers

Introductory questions

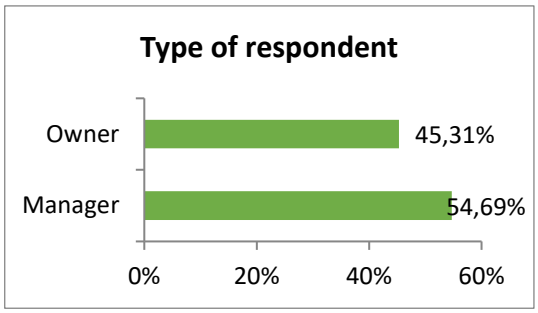
QUESTION 1. PROVISION OF PERSONAL DATA



81% (N=128) of the respondents accepted to provide their personal data in order to receive relevant project information, invitations to events, invitations to participate in surveys and other communications related exclusively to the EcoSME project and the EcoSME Network, which reveals a sensitivity to sustainability issues and a willingness to increase knowledge. However, at the end of the survey, out of a total of 128 responses only 43 participants filled with their personal information.

QUESTION 2. TYPE OF RESPONDENT

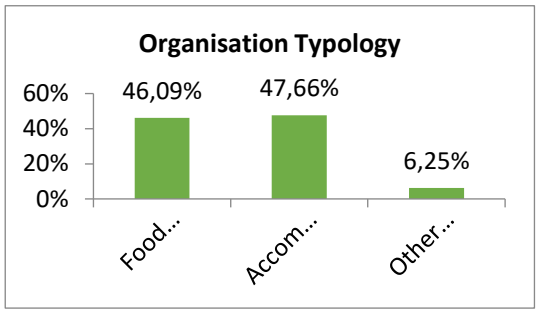
"I am responding to this consultation as a…"



Results show a balance between owners and managers, with 55% (N=128) of the participants being managers, while 45% were owners. This is normal due to the majority type of organisation size, as seen in the following questions.

QUESTION 3. ORGANISATION TIPOLOGY

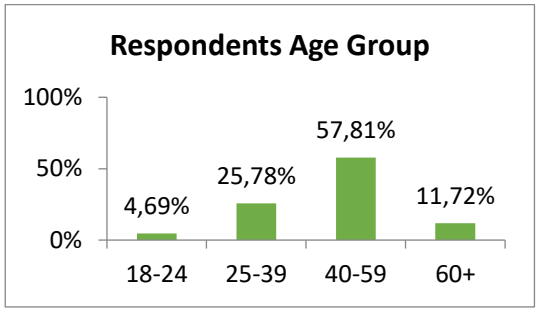
"My SME is…"



The strategy in the sending of the survey was a balance between F&B companies and accommodation, therefore these results reflect this approach and the same balance.

QUESTION 4. RESPONDENTS AGE GROUP

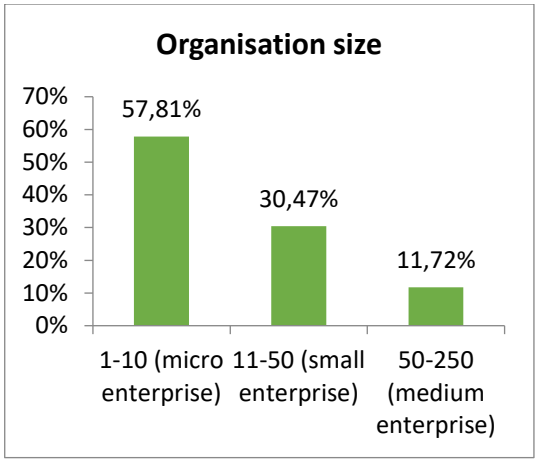
"Which age group do you belong to?"



Most participants (near 60%, N=128) are between 40 and 59 years old. Also, an expected result due to their position (managers or owners).

QUESTION 5. ORGANISATION SIZE

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

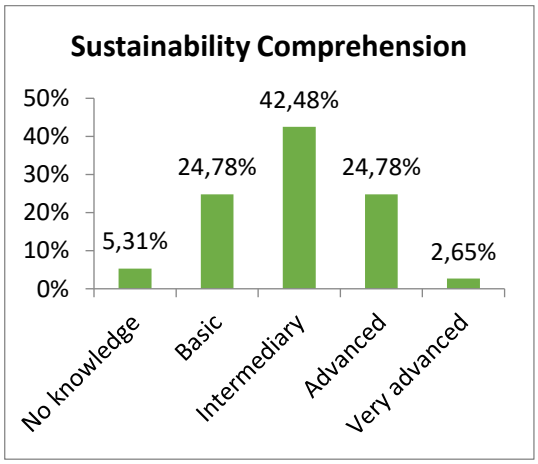


Predominancy of micro-enterprises. As mentioned above, the high percentage of owners respondents is due to the high percentage of owners involved in their organisations' daily operation (due to their small size).

Sustainable Business Concepts

QUESTION 6. SUSTAINABILITY COMPREHENSION

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

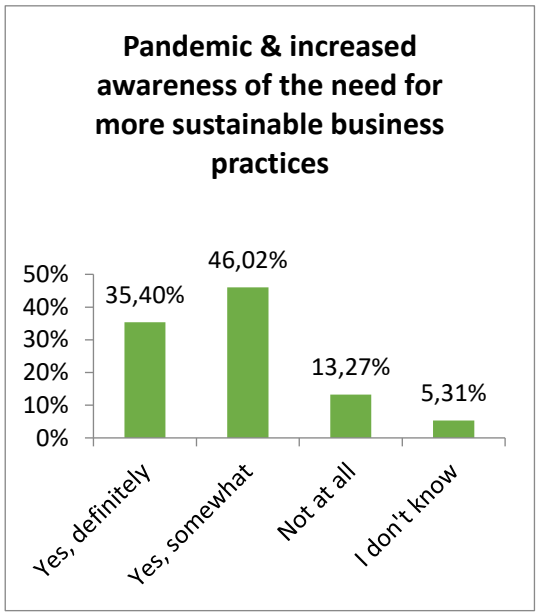


Approximately 67% (N=113) of participants consider having a basic or intermediate knowledge of sustainability principles in a business context. And 27% declared to have an advanced or very advanced level. 5% consider they have no knowledge.

It's not possible to conclude if this is a very good rate (it seems) or not. When comparing Portuguese results with the other partners' countries, it will be interesting to come back to this question.

QUESTION 7. PANDEMIC & INCREASED AWARENESS OF THE NEED FOR MORE SUSTAINABLE BUSINESS PRACTICES

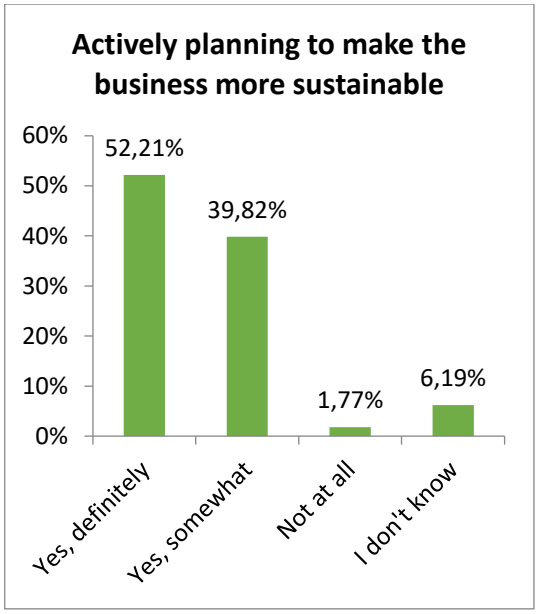
"Has the pandemic contributed to an increased awareness of the need for more sustainable business practices of your SME?"



81% (N=113) of participants responded the pandemic contributed to an increased awareness of the need for more sustainable business practices for their SMEs, so we can interpret that pandemic had a "good" effect on sustainability consciousness in Portuguese tourism SMEs.

QUESTION 8. ACTIVELY PLANNING TO MAKE THE BUSINESS MORE SUSTAINABLE

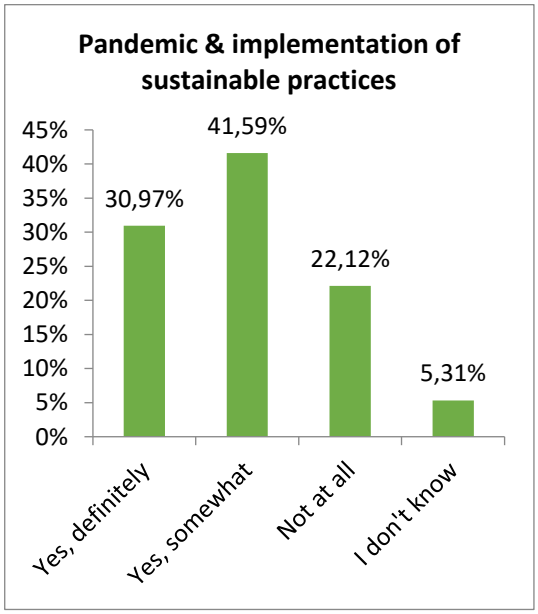
"As an SME, are you actively planning to make your business more sustainable?"



92% (N=113) of participants are actively planning to make their business more sustainable. As this percentage is near 100%, in this case, we can already conclude this is a positive outcome of the pandemic.

QUESTION 9. PANDEMIC & IMPLEMENTATION OF SUSTAINABLE PRACTICES

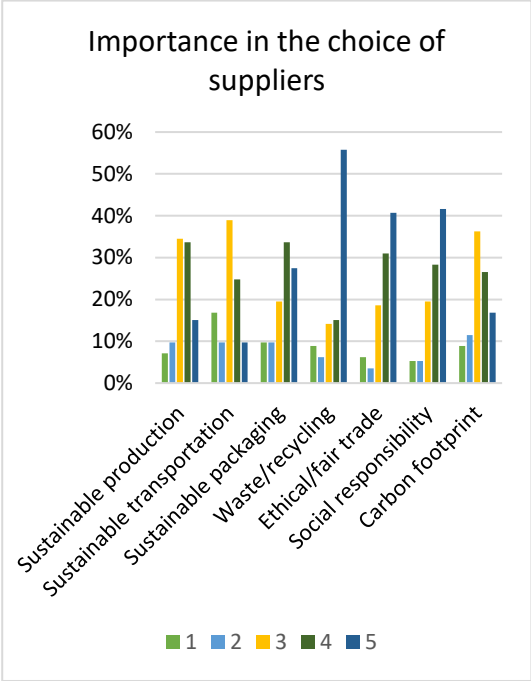
"Has the pandemic led to the implementation of more sustainable practices for your SME?"



73% (N=113) of participants consider the pandemic led to the implementation of more sustainable practices in their SMEs. So again, a cause-effect relationship between pandemic and sustainable practices. But in this case, we will only be able to conclude if this result is very positive (or not) depending on other countries' results. What we can say is that not all the SMEs that are now more conscious about sustainability have already passed from thinking to action (3% =>73%). Maybe due to costs, lack of knowledge, etc.

QUESTION 10. IMPORTANCE IN THE CHOICE OF SUPPLIERS

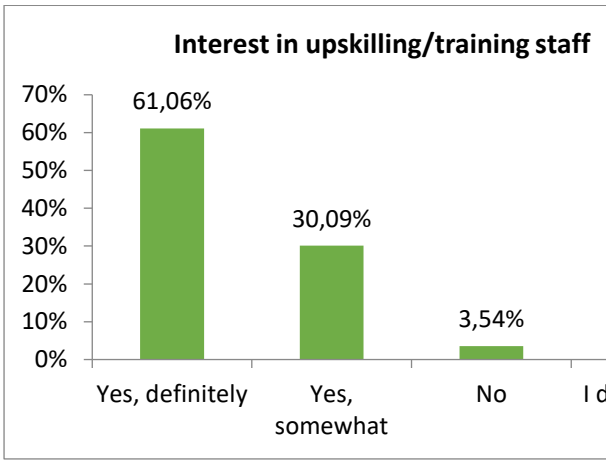
"Please rate the importance of the following in terms of how you choose your suppliers. (1-5 for each, 5 being the most important)"



In the choice of suppliers, participants consider to as the most important: waste/recycling; social responsibility; and ethical/fair trade.

QUESTION 11. INTEREST IN UPSKILLING/TRAINING STAFF

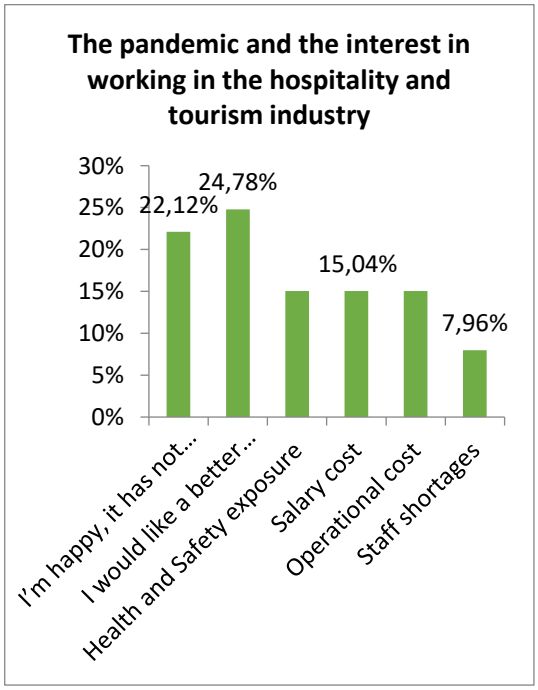
"Are you interested in upskilling/training staff to improve and develop sustainable practices?"



91% (N=113) of participants are interested in upskilling/training staff to improve and develop sustainable practices.

QUESTION 12. THE PANDEMIC AND THE INTEREST IN WORKING IN THE HOSPITALITY AND TOURISM INDUSTRY

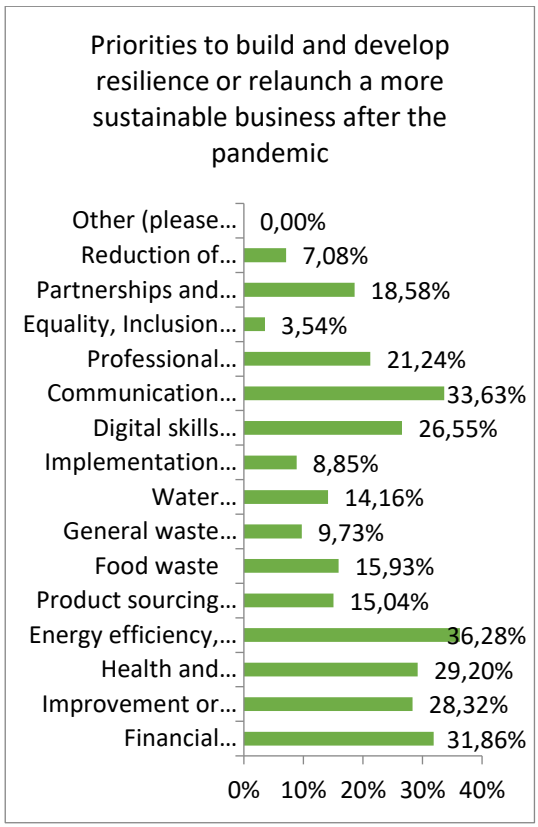
"Has the pandemic impacted on your interest in working in the hospitality and tourism industry?"



When asked if the pandemic impacted their interest in working in the T&H industry, one-fourth (24%, N=113) of participants expressed they would like to have a better work/life balance and 22% considered the pandemic did not impact their interest. There was a balance between health and safety exposure (15%), salary cost (15%), and operational cost (15%). 8% mention staff shortages. This answer seems to coincide with the lack of human resources interested in working in this sector after the pandemic, not only in Portugal but as a general problem in Europe.

QUESTION 13. PRIORITIES TO BUILD AND DEVELOP RESILIENCE OR RELAUNCH A MORE SUSTAINABLE BUSINESS AFTER THE PANDEMIC

"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)"

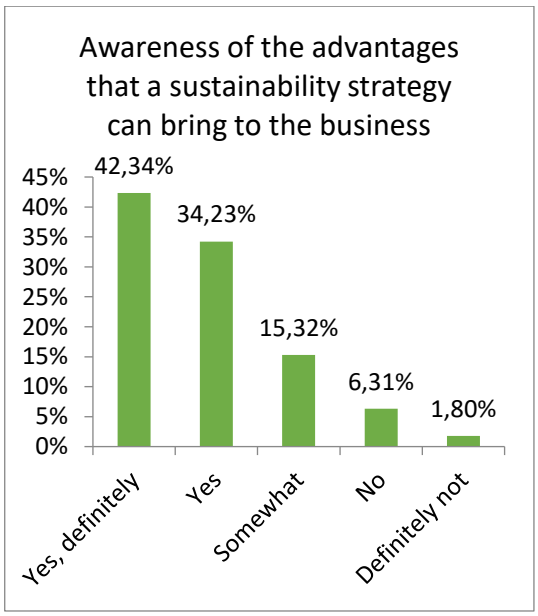


Most respondents consider the priority areas to build and develop resilience or relaunch a more sustainable business after the pandemic in their business are energy efficiency, consumption and management (37%, N=113); communication and marketing (34%); and financial management (32%). So, even if this answer is due to other reasons (costs control and increase of incomes) they are also related to sustainability (environmental and economic).

Challenges and Opportunities

QUESTION 14. AWARENESS OF THE ADVANTAGES THAT A SUSTAINABILITY STRATEGY CAN BRING TO THE BUSINESS

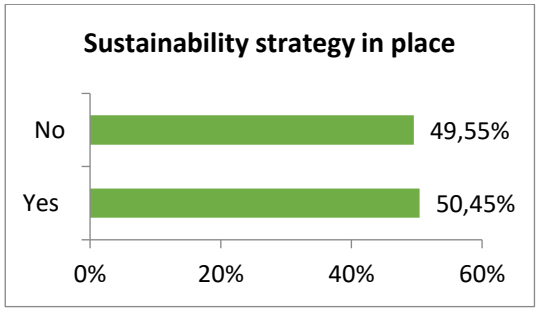
"Are you aware of the advantages that a sustainability strategy can bring to your business?"



Most participants are aware of the advantages of a sustainability strategy for their businesses. However, 8% (N=111) responded that they are not. A priori, this is not a worrying percentage.

QUESTION 15. SUSTAINABILITY STRATEGY IN PLACE

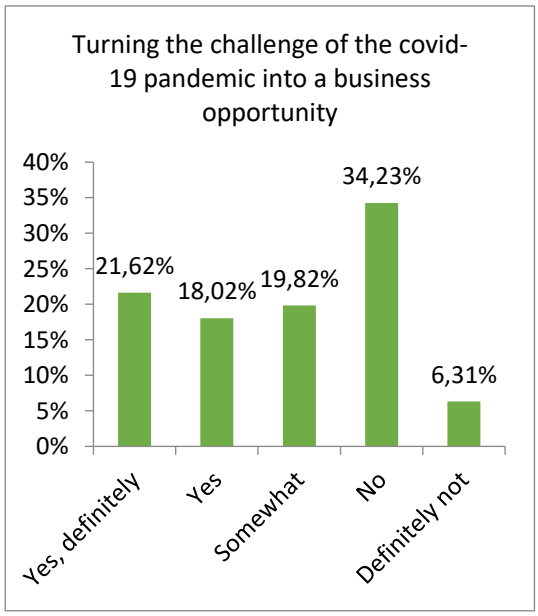
"Do you already have a sustainability strategy in place?"



50% (N=111) of participants consider they have a sustainability strategy in place. Only in the context of analyzing the other partners' results, we will be able to conclude if 50% is a good percentage. But a priori, we could say it is a weak result.

QUESTION 16. TURNING THE CHALLENGE OF THE COVID-19 PANDEMIC INTO A BUSINESS OPPORTUNITY

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



There was a balance in terms of who said they had (40%, N=111) and who had not (41%) turned the challenges of the COVID-19 pandemic into business opportunities.

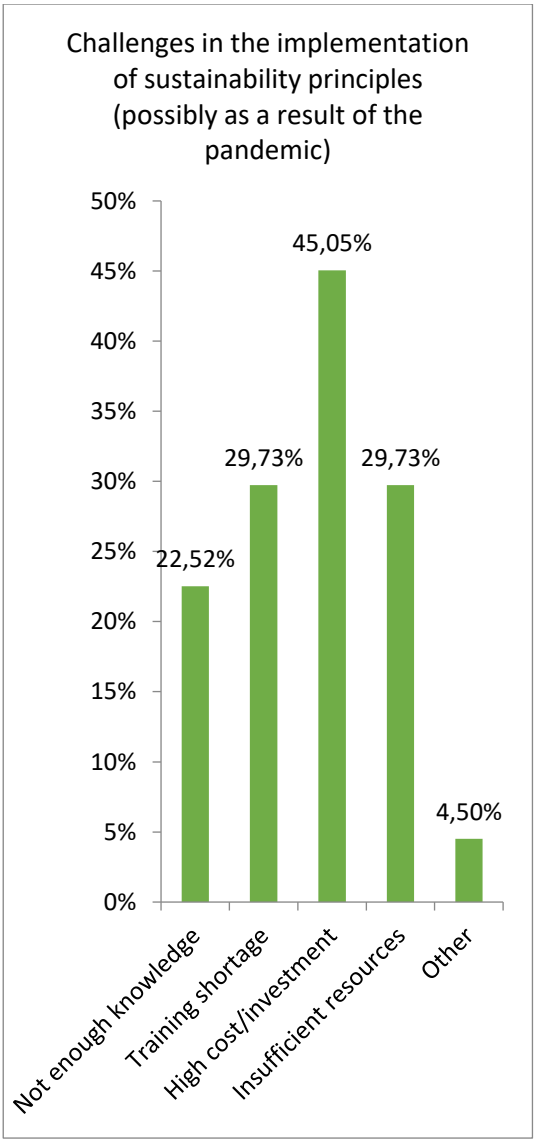
When asked how they turned challenges into opportunities, several participants mentioned the adoption of the new reality by turning their communication with customers more efficient, and adapting the business, for example by restaurants implementing takeaway and selling at the doorstep. Several mentioned adopting sustainable practices, with a greater concern for food waste, hygiene, and plastics; implementing concepts linked to the circular economy and investing in greater energy efficiency.

It was also mentioned that with the pandemic, many people tried to stay away from crowded places, thus avoiding urban areas, where the probability of getting COVID-19 could be higher, choosing cosy, comfortable, hygienic, and natural environments (search for nature). With the pandemic and the fact that the establishment could not have so many people inside. Some people adapted the establishment to adopt an exclusive image. Guests prefer exclusivity and open spaces with gardens due to the pandemic.

Pandemic has arisen opportunities for ones but not for others, so no conclusions can be supported by this question. No crowded destinations have taken profit from this conjunction; but neither is confirmed that businesses who were able to fast put in place delivery, take away, etc. in big cities have.

QUESTION 18. CHALLENGES IN THE IMPLEMENTATION OF SUSTAINABILITY PRINCIPLES (POSSIBLY AS A RESULT OF THE PANDEMIC)

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



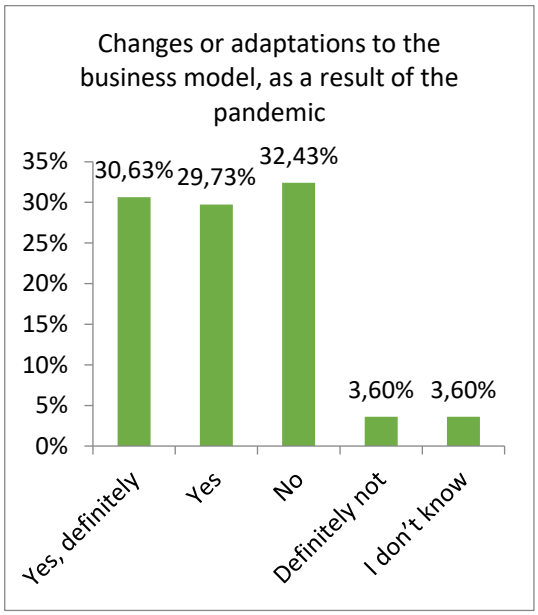
Regarding the challenges in the implementation of sustainability principles (possibly as a result of the pandemic), most participants mentioned the high costs/investment (45%, N=111), followed by a balance between training shortage (30%) and insufficient resources (30%). 23% answered not enough knowledge. In other challenges, some mentioned the shortage of partners for sustainable products with competitive prices.

This project can contribute to solving some of the challenges such as the weaknesses in knowledge (but only related to sustainability) and the perception of non-competitive prices as an obstacle to working with sustainable products

(reflecting, in certain cases, also a lack of knowledge).

QUESTION 19. CHANGES OR ADAPTATIONS TO THE BUSINESS MODEL, AS A RESULT OF THE PANDEMIC

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

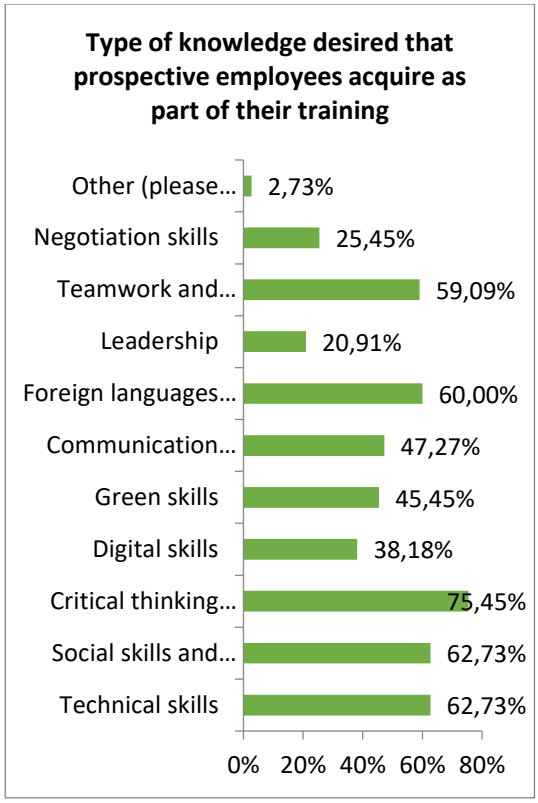


Even if the majority of the answers (more than 60%, N=111) revealed changes, nearly 39% are not coherent with the reality, once many SMEs have closed due to pandemic.

The role of innovation, technology and strategy for sustainability

QUESTION 20. TYPE OF KNOWLEDGE DESIRED THAT PROSPECTIVE EMPLOYEES ACQUIRE AS PART OF THEIR TRAINING

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

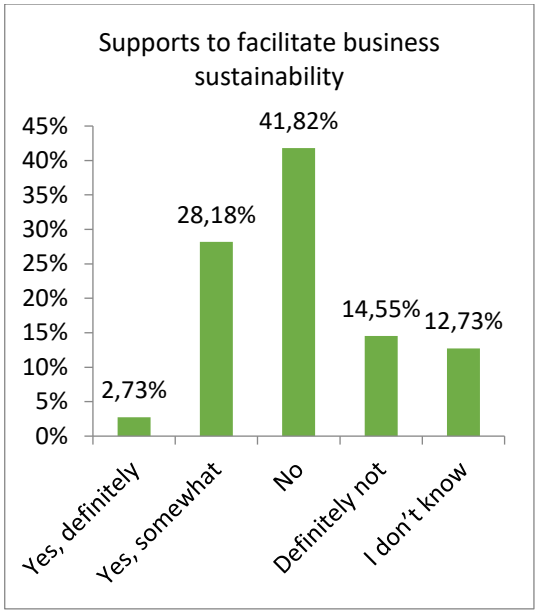


Most of the participants (N=110) mentioned that the five most important types of knowledge desired that prospective employees acquire as part of their training are: critical thinking and problem solving, social skills and customer service, technical skills, foreign language skills, and teamwork and collaboration.

In this question, an error was identified. When it was added online, entrepreneurial skills and digital skills were put in one option when they were supposed to be separated. They were considered digital skills.

QUESTION 21. SUPPORTS TO FACILITATE BUSINESS SUSTAINABILITY

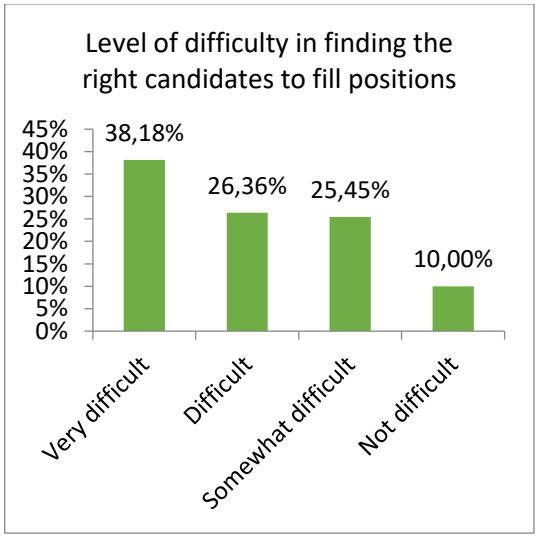
"Are there enough supports in your region/country to facilitate business sustainability?"



Most respondents answered that there is not enough support in their region/country to facilitate business sustainability. 31% (N=110) said there is, while 13% said they did not know.

QUESTION 22. LEVEL OF DIFFICULTY IN FINDING THE RIGHT CANDIDATES TO FILL POSITIONS

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

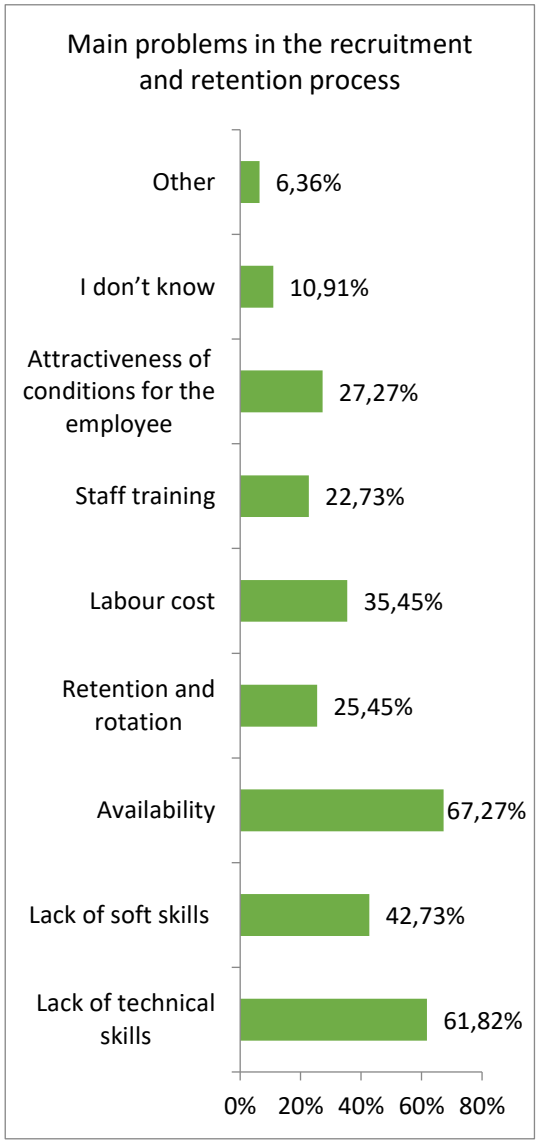


10% (N=110) of the participants said it was not difficult to find the right candidates to fill positions (regarding skills, talents, knowledge, and abilities), but the majority, i.e. more than 64% said it was very difficult or difficult.

Absolute coherence of this answers with other previous questions related to the lack of staff, bigger after the pandemic.

QUESTION 23. MAIN PROBLEMS IN THE RECRUITMENT AND RETENTION PROCESS

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

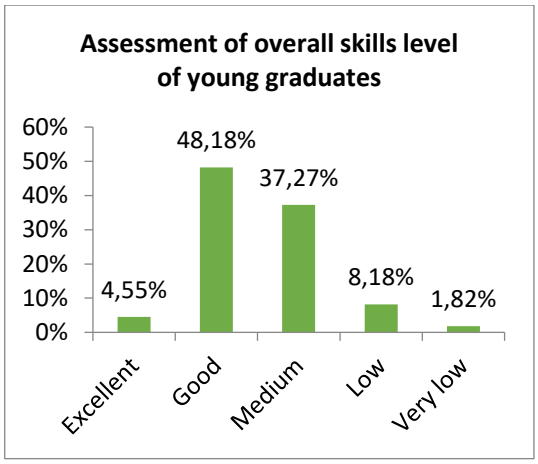


Most of the participants consider the three main problems in the recruitment and retention process are: availability (67%, N=110), lack of technical (62%) and soft skills (43%).

On the other hand, the majority reported a lack of candidates, although some also mentioned the enjoyment for work and the lack of knowledge for the business and a lot of difficulty in passing on the message that recent graduates cannot move immediately into management positions, forgetting the whole process of learning and growth in a work context.

QUESTION 24. ASSESSMENT OF OVERALL SKILLS LEVEL OF YOUNG GRADUATES

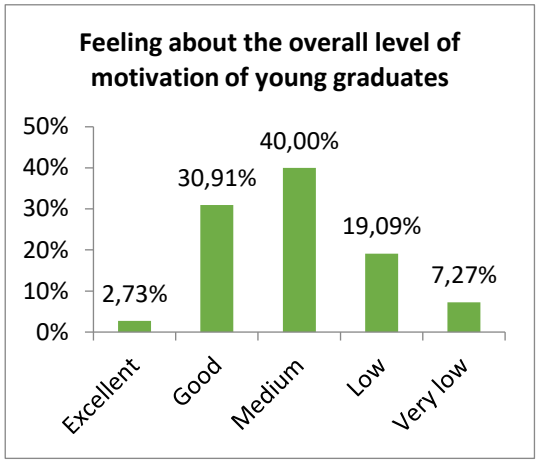
"How do you judge the overall skills level of young graduates?"



The participants judged the overall skills level of young graduates as good or excellent (more than 50%, N=110). Again, only through the comparisons with the other partners' results, conclusions will be able to be done for Portugal about the better or worse level of overall skills of our graduates.

QUESTION 25. FEELING ABOUT THE OVERALL LEVEL OF MOTIVATION OF YOUNG GRADUATES

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

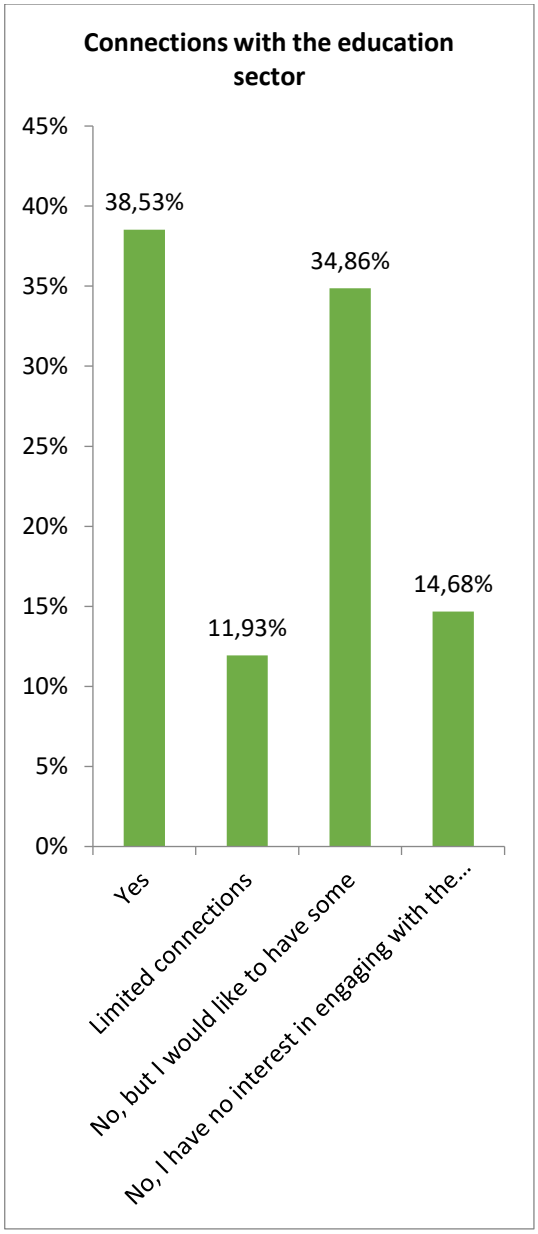


The participants felt the overall level of motivation of young graduates mostly as good (31%, N=110), and medium (40%). Only 19% consider it as low and 7% as very low. So, no very results, once approximately 67% have not enough motivation.

Partnerships and collaborations

QUESTION 26. CONNECTIONS WITH THE EDUCATION SECTOR

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

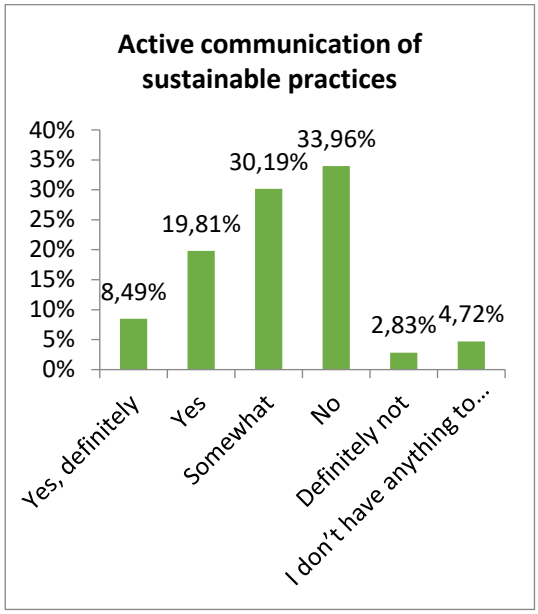


50% (N=109) of participants have connections (at any level) with the education sector (for recruitment, training, knowledge exchange, educational programmes etc.), of which 12% only have limited connections. About 35% have no connections with the educational sector but would like to have some. 15% have no interest in engaging with the education sector. So, some efforts can still be done from both sides to be connected in order to improve some issues that have been identified in this survey, for instance.

Communication and Marketing

QUESTION 27. ACTIVE COMMUNICATION OF SUSTAINABLE PRACTICES

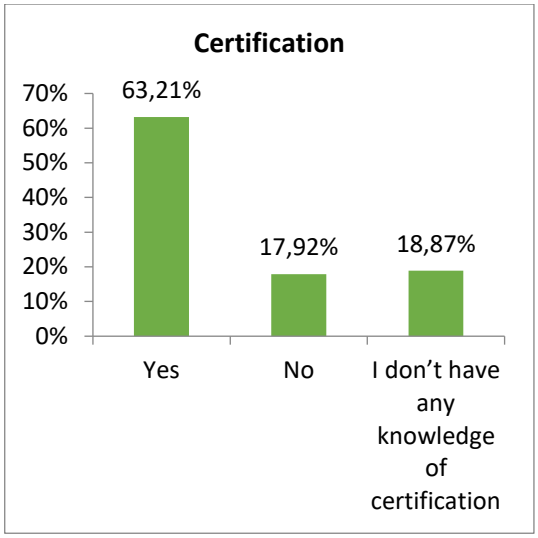
"Does your business actively communicate its sustainable practices?"



37% (N=106) of the participants revealed that they do not actively communicate their sustainable practices. This means that they don´t see the marketing value of these practices and they have implemented them for economical or conscious responsibility. Another interesting point identified for training modules.

QUESTION 28. CERTIFICATION

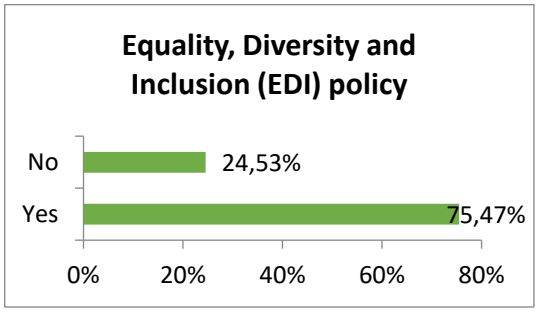
"Are you interested in certification of your business in order to demonstrate your sustainability efforts?"



63% (N=106) of participants are interested in certification of their business in order to demonstrate their sustainability efforts. 18% are not interested and 19% answered no knowledge of certification. Even if more than 60% seems a good percentage, training modules can include topics about certifications and their advantages in the market.

QUESTION 29. EQUALITY, DIVERSITY AND INCLUSION (EDI) POLICY

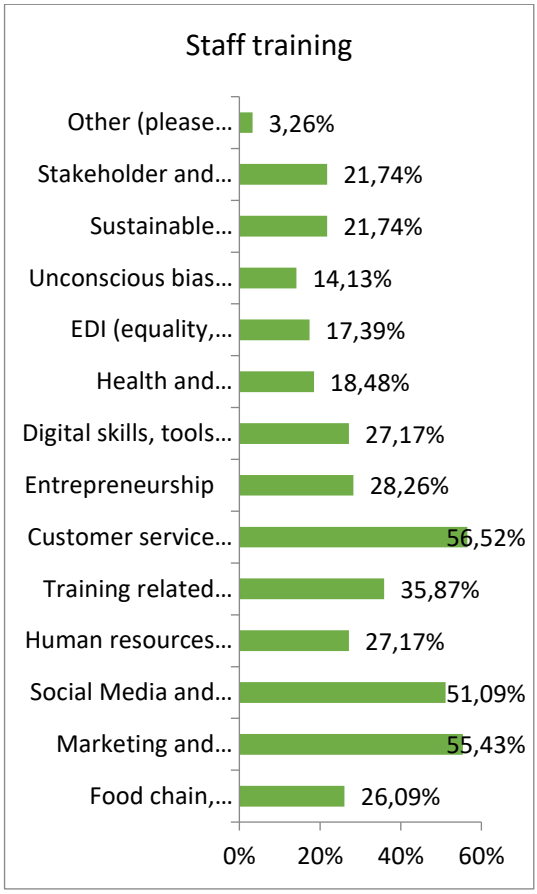
"Does your business have an equality, diversity and inclusion policy (EDI)?"



Most participants (75%, N=106) stated that their business has an equality, diversity and inclusion (EDI) policy. With the best practices compilation, the most interesting will be identified.

QUESTION 30. STAFF TRAINING

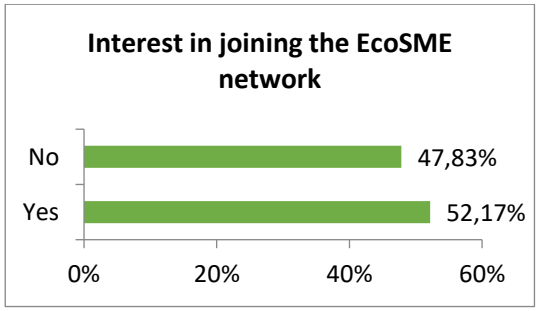
"Among the following training options, apart from sustainable business management, which ones could your business and staff benefit from? (multiple answers possible)"



Most of the topics pointed out by owners and managers can be worked on from the point of view of sustainability in the training modules.

QUESTION 31. INTEREST IN JOINING THE ECOSME NETWORK

"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?"



52% (N=92) of participants are interested in joining the EcoSME network of hospitality SMEs, which will allow for networking and the exchange of best practices on sustainable business management.

4. Conclusions

4.1 Evaluation of consultation process

The survey is composed of 32 questions. Throughout the survey, we could see that the number of answers decreased, with 15 to 36 respondents. This is because it was not made compulsory to answer. However, in the English version, all questions required an answer. But we consider the response rate as a good one.

We can establish four types of answers:

- Some of the answers have to be compared with the other project partners' answers, so the joint report will arise lighter about them (for instance, sustainability comprehension) and this is one of the riches of this project;
- But also, some answers are interested at a national level (for instance, the potential to improve common work between industry and training institutions);
- Answers that reinforce ideas about training modules contents, so this survey is a very good input for the following phase;
- Finally, answers that confirm new realities after the pandemic (lack of staff, for instance) and which would launch non-conjunction reflections in the sector (how to improve workers' quality of life in this sector for instance).

Results highlight the pandemic contributed to increased awareness about sustainability and the benefits of the need for more sustainable business practices for their SMEs, so we can interpret that pandemic had a "good" effect on sustainability consciousness in Portuguese tourism SMEs. The pandemic has led most to implement more sustainable practices in their SMEs and are actively planning to make their business more sustainable. This also results from the fact that the majority are aware of the advantages of a sustainability strategy for their businesses. Pandemic has created opportunities for some and not for others.

Regarding the challenges in the implementation of sustainability principles (possibly as a result of the pandemic), most participants mentioned the high costs/investment, followed by a balance between training shortages and insufficient resources. In other challenges, some said the shortage of partners for sustainable products with competitive prices. The project can contribute to solving some of the challenges such as the weaknesses in knowledge (but only related to sustainability) and the perception of non-competitive prices as an obstacle to working with sustainable products (what is, in a way and in some instances, also a lack of knowledge).

An interesting point identified for training modules is that some participants revealed that they do not actively communicate their sustainable practices. This means that they don't see these practices' marketing value and have them implemented for economic or conscious responsibility.

Most participants are interested in certifying their business to demonstrate their sustainability efforts. A considerable percentage of participants expressed no knowledge of certification. Training modules can include topics about certifications and their advantages in the market.

5. References

(n.d.). Retrieved June 2022, from NEST: https://www.nestportugal.pt/resources/tplus-a-ferramenta-de-autodiagn%C3%B3stico-de-sustentabilidade/

Costa, S. (2011). Certificação da Qualidade no Turismo Estágio na Sociedade Geral de Superintendência (SGS) [Relatório de Estágio]. Escola Superior de Hotelaria e Turismo do Estoril.

Dias, M. (2017). Qualidade e Certificação em Turismo: Estudo de Caso no Sector Hoteleiro [Relatório de Estágio]. Escola Superior de Hotelaria e Turismo do Estoril.

Diretrizes da Sustentabilidade | Labels e Certificações - BCSD Portugal. (2021). BCSD Portugal. https://bcsdportugal.org/diretrizes-da-sustentabilidade-labels-certificacoes/

Font, X. (2002). Environmental certification in tourism and hospitality: progress, process and prospects. Tourism management, 23(3), pp.197-205.

Malheiro, Maria & Sousa, Bruno & Liberato, Dália & Liberato, Pedro. (2020). Sustainability In Tourism And Hospitality: Trends And Challenges.

INE, I. P. (n.d.). *Conta Satélite do Turismo 2016-2019.* Retrieved June 2022, from INE: https://www.ine.pt/ngt_server/attachfileu.jsp?look_parentBoui=470198104&att_display=n&att_download=y

Pardo, C., Silva, G., & Paiva, S. (2021). The role of Big Data in monitoring sustainability of tourism destinations: the case of North Portugal Region. *4th International Conference on Tourism Research (ICTR21).* Portugal. doi:10.34190/IRT.21.071

Turismo de Portugal. (n.d.). Retrieved June 2022, from Turismo de Portugal: http://www.turismodeportugal.pt/pt/Turismo_Portugal/visao_geral/Paginas/default.aspx

Turismo de Portugal. (n.d.). Retrieved June 2022, from Turismo de Portugal Business: http://business.turismodeportugal.pt/SiteCollectionDocuments/sustentabilidade/plano-turismo-mais-sustentavel-20-23-eng.pdf

Turismo de Portugal I.P. (2017). *Tourism Strategy 2027.* Retrieved June 2022, from http://institucional.turismodeportugal.pt/SiteCollectionDocuments/estrategia/estrategia-turismo-2027-eng-jul-2021.pdf

Turismo de Portugal, I.P. (2021, April 21). *Planos e Relatórios de Atividade.* Retrieved June 2022, from Turismo de Portugal: http://www.turismodeportugal.pt/SiteCollectionDocuments/gestao/Informacao-de-Gestao/relatorio-atividades-2020-turismo-de-portugal.pdf

Partners

GMIT
INSTITIÚID TEICNEOLAÍOCHTA NA GAILLIMHE-MAIGH EO
GALWAY-MAYO INSTITUTE OF TECHNOLOGY

VIŠJA STROKOVNA ŠOLA ZA GOSTINSTVO IN TURIZEM MARIBOR
VSGT
VOCATIONAL COLLEGE OF HOSPITALITY AND TOURISM MARIBOR

ipvc
Instituto Politécnico de Viana do Castelo

BIA
INNOVATOR CAMPUS

EURAKOM

DOM SPAIN

Co-funded by the European Union

EcoSME