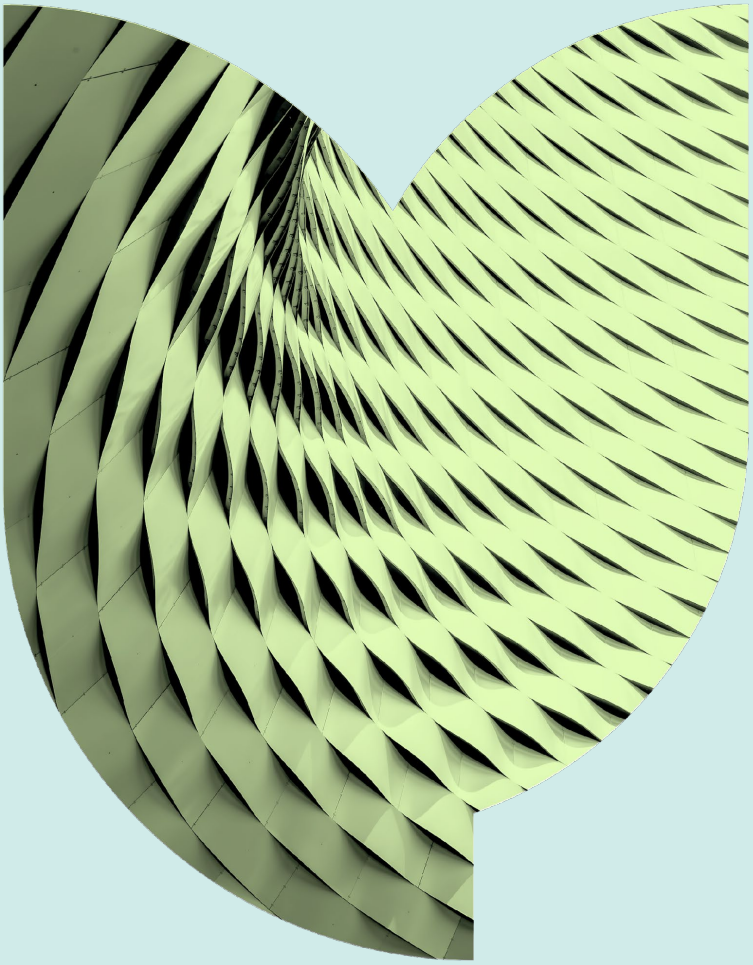
EcoSME

COMPARATIVE REPORT

FRANCE | IRELAND | SLOVENIA | PORTUGAL | SPAIN

November 2022



Co-funded by
the European Union

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Co-funded by the European Union

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

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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 Comparative Report

Background

EURAKOM carried out an analysis in 2020, 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 to be developed 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.

Objectives of the report

The objective was to produce a report about the post-Covid 19 sustainability challenges and skills needs of hospitality SME staff to inform all subsequent project activities of the EcoSME project, especially the training programme and open educational resource by making sure the content developed by the partners is as relevant as possible. The results of the consultation will also help build the case around establishing the EcoSME network. 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 consultation, which preceded the national reports and the comparative report and focused on the post-Covid 19 sustainability challenges and skills needs of hospitality SME staff was tailored in a way to provide crucial information for the development of subsequent project activities and project results and is therefore essential to reaching the project objectives at all levels (regional/national through country analysis and at European level through consolidated analysis).
The country analytical reports can be disseminated to local, regional, national policy makers, VET schools and sector associations in order to highlight the importance to invest in CVET and particularly in the area of sustainability to strengthen the sector. The project is also aiming to produce policy recommendations to be sent to policy makers together with the consultation report.

Target audiences

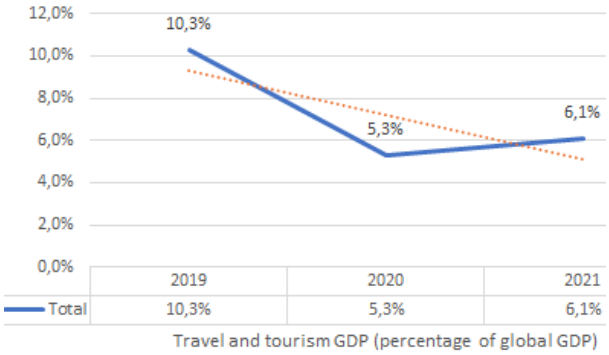
The primary target audiences of the report are local, regional, national public authorities, governments, and policy makers as well as sector representatives but also networks and policy makers at EU level.

The objective is for the result will be able to provide new evidence and information about which challenges persist as a result of the COVID-19 pandemic. The national reports and final consultation report will inform the target groups and support them in making better decisions when it comes to supporting SMEs in the sector. The consultation questions are being made publicly available as an Annex to the national and consolidated consultation report, which allows for other regions and countries to use the questions to carry out similar surveys.

1.3 State of play of sustainability in the hospitality industry in Europe

Policy Context and developments

According to the world travel & tourism council, prior to the pandemic the total Travel & Tourism GDP was representing worldwide 10,3%. During the COVID period in 2020, the pandemic caused a decrease of -50,4% in the Tourism and travel GDP. In 2021, WTTC observed a restart of the sector that is back to a positive growth, even if lower than the pre-pandemic period, this is due notably to the omicron variant development. (1)



Source : Authors elaboration from WTTC datas from "Travel and tourism impact 2022" (2022)

In 2018, the EU's tourism industries employed more than 12 million people in over two million businesses. In addition to this, many others were employed in the broader hospitality sector in bars, restaurants, hotels and entertainment or recreational centres. The Transition Pathway for Tourism published by the European Commission in 2022 and priorities at EU level show that the EcoSME project could not be more relevant as its aim is to contribute to tackling the challenges of the tourism and hospitality sector today.

The Transition Pathway places particular importance on circularity of tourism services that entail reducing the environmental footprint of food services, reducing waste, increasing water efficiency . It also aims at supporting SMEs towards the development of green practices and certification, including EMAS, EU ecolabel and other EN ISO 14024 type ecolabels, using EU green public procurement criteria. EcoSME also covers the aspects and EU key priorities linked to awareness raising on changes in tourism demand towards more sustainability and on skills needs for the twin transition in tourism and benefits of digitalisation for SMEs. Another element, which is central to the transition pathway document is the capacity building for tourism SMEs, for example linked to engaging in environmentally friendly practices and schemes but also the best practice exchange, which will be able to be continued in EcoSME as part of its network. The project was planned at a moment when the hospitality (accommodation/food & beverage businesses) was in a deep crisis as a result of temporary and permanent closures and loss of its customer base linked to the Covid-19 pandemic. Since March 2021 when this project was submitted for evaluation by the Irish National Agency for Erasmus + (Leargas) the sector has seen some very positive signs of recovery and considerable investments to not only support tourism and hospitality businesses to ensure their survival but also considerable actions to drive the green and digital transition of SMEs. Despite some good signs that the sector is picking up, persistent challenges remain, in particular the lack of attractiveness of choosing a career in hospitality or starting one's own business.

Together with tourism, the hospitality sector is the 3rd largest socio-economic activity in the EU, a reason why a recovery of the industry is so essential for the European and national economies, especially in EU countries highly dependent on incoming tourism.
The industry is central to the European recovery and as such needs to contribute to building smart (digital, sustainable) ecosystems for all tourism stakeholders, which offer travellers more memorable and sustainable experiences through for example longer or off-season stays (European Tourism Convention 2020). Travellers, tourism businesses (90% of which are SMEs or microbusinesses) as well as destinations all need to be supported in working towards a sustainable tourism recovery. The future of tourism is green, digital and inclusive. The hospitality sector plays an important role in social inclusion, offering the first job experience for many young people. It also offers jobs to relatively unskilled people, as 30,2% have a lower secondary education or under, compared to 17,7% in the overall economy (EUROSTAT). The Council Recommendations on VET and the New European Skills Agenda as well as the Osnabrück Declaration (2020) provide important policy background for the work that needs to be carried out in the tourism sector. The four priorities of the Osnabrück declaration are highly levant in the context of EcoSME: 1. Resilience and excellence through quality, inclusive and flexible VET 2. Establishing a new lifelong learning culture – relevance of CVET and digitalisation 3. Sustainability – a green link in VET 4. European Education and Training Area and international VET.
The project is also answering to the recently published European Commission Digital Education Action Plan (2021-2027) by offering inclusive and accessible digital education through high-quality learning resources.

A challenge across Europe is also that SMEs are chronically lacking financial resources and local access to upskill staff (EC 2018).

EU and government measures and investments in sustainable operations

It has been vital that national recovery plans outline the specific measures in detail, which have been taken to support it, and the funding which will be available. Small and medium-sized businesses but also microbusinesses are at the heart of the European hospitality industry and have been in dire need of financial support to ensure a speedy recovery.

Hundreds of thousands of businesses in the hospitality sector have had to close and businesses have had to rely on policy makers to put the right tools in place to ensure recovery and future resilience.

The €72 billion Recovery, Transformation and Resilience Plan which the Spanish government published emphasises the importance of a recovery in the tourism sector and acknowledges the spillover effects which this would create.

France's recovery plan also highlights tourism, along with the supports which are in place to cover wages in struggling sectors. Elsewhere, around 30% of the funding within Portugal's Recovery and Resilience Plan was dedicated to supporting companies directly, with the tourism sector set to be prioritised.
The Recovery and Resilience Facility (RRF) is the centrepiece of Europe's recovery plan, Next Generation EU. It finances reforms and investments in EU countries from the start of the pandemic in February 2020 until 31 December 2026. Its aim is to mitigate the economic and social impact of the COVID-19 crisis and make European economies and societies more

sustainable, resilient and better prepared for the challenges and opportunities of the green and digital transitions. It is relevant for all industrial ecosystems, including tourism. EU countries are responsible for developing national recovery and resilience plans, containing investments and reforms to address the key challenges identified in the European Semester framework, and to support the green and digital transition.

The national recovery and resilience plans determine how the funds are allocated. Depending on the EU country, tourism is covered either by tourism-specific measures that modernise the sector or horizontal measures that are relevant to all sectors. The European Commission has defined seven flagship initiatives, for which it encourages EU countries to put forward investments and reforms. (3)

The impact of Covid-19 on the hospitality industry

The Covid-19 crisis has had a considerable effect on sustainability in the hospitality industry worldwide. The crisis has offered increased awareness and overall understanding about scope and benefits of sustainability and has led to unprecedented measures taken by tourism businesses. Customer demand for sustainable offers and travel also surged as part of the pandemic, offering businesses new opportunities to develop a new unique selling point on the market. However, the new demands on the industry also pose some challenges for businesses who are fearing the need for increased investments in order to comply with new demands and stay profitable. Most recently due to the start of the Ukraine war, energy prices have surged and have put additional financial pressure on businesses but also fuelled the debate about renewable energy and the circular economy for the hospitality and tourism industry.

In general, tourism across Europe saw a slight recovery after the pandemic in 2021, while figures for 2022 are exceeding pre-pandemic levels in many popular tourism destinations. Ultimately the pandemic did not dramatically change the views of most travellers and unsustainable travel and overtourism are back on the global agenda. Economic recovery of destinations, especially those who are highly dependent on incoming tourism has been at the forefront of national priorities and understandably so. Despite sustainability being a key focus when it comes to investment and funding in the sector, a majority of tourism businesses still have some way to go to fully understand expectations linked to sustainable operations and performance.

Certifications and networks linked to sustainable tourism have seen a surge in membership. Destinations have joined the GSTC or are working on awards or certifications linked to the Green Destinations, Earth Check or other schemes. A lot of work still needs to be done to guide hospitality SMEs through the maze of available certifications and labels for them to showcase their sustainability credentials.

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 have resulted in a comparative report prepared by EURAKOM.

Partners administered the consultation between 20th February, 2022 and the 15th June, 2022 obtaining a total of 443 answers across the 5 participating partner countries. Since the number of responses was low in

all participating countries, the deadline was extended twice after consulting with all partners. The numbers of responses varied a lot across countries and partners encountered a lot of difficulty in collecting responses.

The efforts to collect the data were initially done through all online avenues (email, social media, online networks and direct messaging) using each of our organisations' list of stakeholders to connect with. After a low performance of the consultation, further actions were initiated to reach the desired targets. Phone calls were made directly to relevant stakeholders asking for participation in the consultation. This was more effective than an open call out online, but partners still had hesitation in receiving the surveys back.

In Ireland and Portugal, a team of 3-5 people went "door-to-door" asking for participation in person and filling out the consultation in real time. A similar strategy was also followed in Spain after not having received a sufficient number of answers. This was more successful, as people were more willing to commit their feedback in the moment, instead of relying on them to fill it out independently and send it back to the partners. In France EURAKOM worked with several networks and representatives in order to widely disseminate the consultation at a national level. However, despite targeting more than 5000 SMEs, the participation remained very limited.

The reasons for the lack of participation were similar in all partner countries. SMEs indicated that they either did not have time or capacity to fill in the consultation or it was not considered an immediate priority during times when businesses were struggling financially and trying to survive in the short term. The challenge was for the partners to effectively communicate the benefits of participating in the survey and subsequently benefit from the training programme and EcoSME network.

3. Consultation results

3.1 Overview and Main Trends

Overall, the survey has, despite the limitations of the data sample that has resulted from the consultation in the five partner countries, brought some interesting results to light. The answers provided in the different countries have led to insights that can be very relevant as a starting point for subsequent work and collaboration with national and regional stakeholders. The results provide confirmations for some assumptions that are being held about SMEs with regard to sustainable business management but also highlight current needs of SMEs in a range of areas that have been covered by the consultation questions. In general, the consultation confirms that the Covid-19 pandemic has resulted in increased awareness about sustainability and has certainly led to some overall shifts when it comes to challenges and needs for adaptation within the sector. While, as mentioned above, the results in the different countries provide insight into national priorities with regard to supporting hospitality SMEs, the comparative report gives some insight into possible differences between the countries that have taken part in the consultation. The comparative report also shows where the shared challenges of SMEs in the partner countries lie and therefore which topics can be relevant for the development of the EcoSME training materials, the training course but also the topics, which the planned EcoSME network can be focusing on.

All national consultation results saw a majority of respondents from the food and beverage sector, mainly restaurants. 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 across the partner countries were owners from the age group of 40-59 years, the vast majority from small or micro businesses. Most respondents are considering their understanding of sustainability either basic or intermediary. Slovenia, however, stands out with a majority of respondents indicating that they have advanced knowledge. Although the sample is small, the consultation confirms the assumption that smaller businesses run by owners/managers from the 40+ age group, with the exception of respondents from Slovenia, have mostly limited knowledge about sustainability.

The consultation confirmed that the pandemic has had an impact on the awareness of SMEs of the need for more sustainable practices, overall, in the framework of the consultation this mainly affects restaurants since most respondents belong to this category. The results show that SMEs are mostly keen to improve the sustainable practices of their business and that the majority 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 across the countries only have basic or intermediary knowledge about sustainability and on the other hand, they claim to have taken action to improve their sustainability record.

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 across the five countries 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 across Europe. Answers across the participating countries varied somewhat except for the wish for a better work/life balance. The responses to this question seem to coincide with the lack of professionals interested in working in this sector after the pandemic, as a general problem in Europe. Staff shortages seemed to be an issue in some countries. Surprisingly this issue did not show in the Portuguese and Spanish data, although it is widely known that these countries also suffer from considerable post-pandemic staff shortages.

When asked, which areas their SME considers to be a priority, a majority responded energy efficiency, consumption and management, but food waste was also considered important, which is understandable because of the share of respondents from restaurants.

Overall, across the participating countries, respondents indicated that they were aware of the advantages that a sustainability strategy can bring to their business. The answer of those who were “somewhat” aware was higher than the number of those who were aware. The number of those who were “definitely” aware was also quite high. 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. Somewhat surprisingly, the majority of respondents indicated that they have a sustainability strategy in place despite the fact that overall, there was still a considerable number of respondents who considered themselves as having limited knowledge about sustainability.

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 (More details about results from the different countries can be found in the description of the results linked to question 17).

High cost and investments as well as lack of resources are seen as the main challenges linked to the successful implementation of sustainable practices in the partner countries. The consultation showed that the pandemic forced a majority of consulted businesses to look into changing or adapting their business model. Here it also has to be considered that a large number of businesses closed because they did not change their business model, or they did not have the time or chance to do so before they went out of business.

Owners and managers do have a wish list of skills they would like their employees to acquire as part of their training. The types of knowledge commonly cited by the five countries are: social skills and customer services, critical thinking and problem solving and teamwork and collaboration. 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 in the partner countries. 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.

Overall, respondents from the five countries replied that they had difficulties in finding the right candidates to fill positions, which reflects the post-pandemic tourism labour market that currently has major issues with staff shortages and lacks 20% of its total staff needs (WTC, 2022).

With regard to how respondents judge the overall skills level of young graduates in the five countries, levels where slightly different across the partner countries. They were judged as excellent in Slovenia by 90% of respondents and good or excellent by 50% in Portugal and as good by 45% in Ireland. In France, however, they were judged by 45% as medium and as lower by the remaining respondents in that country.

Concerning motivation, the consultation shows that the overall level of motivation of young graduates is not at a satisfactory level for the sector. In most countries the level of motivation is “medium”.

Overall, the majority of respondents said that they did have some contacts with the education sector, and some of those who said they had some, the connections were limited. Slovenia once more stands out among the partner countries, with 80% of respondents indicating that they have connections (at any level) with the education sector (for recruitment, training, knowledge exchange, educational programmes etc.).

The consultation shows that participating SMEs across the partner countries do not actively or sufficiently communicate about their sustainable practices. Furthermore, it shows that they might lack the awareness about the benefits of sharing their practices with suppliers, customers or the wider community. Lack of communication can maybe also be linked to lack of marketing and communication skills or digital skills. However, the majority of respondents in the five countries showed interest in different types of sustainability certification. At the same time the consultation also showed that there are still SMEs who do not have any knowledge about certification and how to obtain it.

As for future training courses that SMEs might be interest in, respondents across the partner countries picked “customer services and communication skills” as a main training option their business and staff could benefit from. The option of “social media and communication channels training” was also mentioned as an important one mentioned in three countries (France, Portugal, and Ireland), as was “marketing and sales training”, which was mentioned by respondents in Portugal, Ireland and Spain. The last two options mentioned above would confirm the earlier theory that lack of communication about sustainable practices can be linked to lack of digital communication and marketing skills.

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.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.

Overall, the majority of respondents in all partner countries agreed to data sharing and retention of their data as part of the EcoSME project. In France only about 57% of the respondents authorised data sharing for the retention of their personal data in the EURAKOM database, followed by Spain with 63% while in other countries the share was 81% (Portugal), 75% (Slovenia), 70.4% (Ireland) respectively. Although the percentage of people who said yes to this question was relatively high, a low proportion of respondents did fill in the last question of the survey that asked them to provide some personal details in order to stay informed.

Question 2: I am responding to this consultation as a [owner or manager]?

This question was mandatory.

The share of managers compared to owners who answered the consultation was relatively different in the partner countries. France is the only country where more owners than managers took part in the consultation, about 57% were responding to the consultation as owners and 43% as managers. In the other partner countries, the share of owners was lower, namely 45% (Portugal), 40% (Slovenia), 35.8% (Ireland) and 26% (Spain) respectively. Both Portugal and Spain point out in their analysis that this is due to the size and type of organisation owners and managers belonged to who answered the consultation.

Question 3: My SME is…[Food and Beverage SME, Accommodation SME, Tourism Provider]

This question was mandatory.
In Portugal the strategy of the partner was to send out the survey to similar numbers of Food & Beverage and accommodation providers, which resulted in a relatively balanced outcome with a similar number of respondents from both sub-sectors participating in the consultation. In all other countries, a dominance of the Food & Beverage sector could be noted when it comes to the type of participants in the consultation. In France the partner targeted as many as possible from each sector and a great majority of 75% of the SME who took part are restaurants or food and beverage SMEs, and the remaining 20% are either accommodations or other types of tourism providers that provide services linked to both food and accommodation. Similarly, to France, Ireland also recorded a majority of participants from Food & Beverage SMEs, whereas accommodation represented 20.4% of the participants of the survey, with only 13.0% classifying

themselves as a Tourism Provider. Participants were asked to specify what type of Tourism provider they were and in this the consultation in Ireland saw a mix of accommodation, hotels, cafes & multidimensional experiences which include elements of all the suggested sectors. Also in Slovenia, a majority of 61.5 % of respondents came from the Food & Beverage sector, which in their case can be attributed to the types of businesses that were contacted through the networks of the Slovenian Chamber of Commerce for Hospitality and Tourism. In Spain, 73% of the respondents belong to F&B companies while the 21% correspond to accommodation. The remaining 5% belong to other tourism providers, even though they did not specify which one.

Question 4: Which age group do you belong to ?

This question was mandatory.
This question was mandatory. Overall, the majority of all respondents across the partner countries can be situated in the 40-59 age group. In France a great majority of 77% of respondents were in the 40-59 age group, and the remaining respondents were in the 25-39 age group (17%) and in the 60 and + (5%). In the other partner countries, the share of those in the 40-59 age group corresponds to 60% (Portugal), 60% (Ireland), 52% (Slovenia) and 36% (Spain) respectively. Since the consultation targeted owners and managers, it is not surprising that the majority of respondents came from the 40-59 age group.

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

This question was mandatory.
Respondents were asked which type of enterprise they belong to, and they had to choose between micro (1-10 employees), small (11-50 employees), and medium (50-250 employees). In France 57% of respondents were linked to small enterprises, 30% to micro businesses and 13% medium-sized enterprises. In Portugal, respondents came predominantly from micro-enterprises (57%). As mentioned previously, the high percentage of owners is due to the high percentage of owners involved in their organisations' daily operation (due to their small size). Slovenia also saw a dominance of micro-enterprises within the sample (approx. 50%), followed by small enterprises (approx. 30%) and then medium size ones (20%). Also, in Spain the majority of respondents came from micro-enterprises. Overall, across the partner countries, the sample is skewed towards micro-enterprises reflecting the large number of respondents within the F&B sector that are predominantly small-scale businesses. In Ireland the majority of participants held 11-50 employees with 36.4%. 32.1% were micro enterprises, and 31.5% were medium enterprises.

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

Each participant was asked how much they would judge their current understanding of sustainability on the principles of business context. The answers to this question provide a possible glimpse of different levels of knowledge linked to sustainability in the different participating partner countries. Overall, the majority of respondents across partner countries have either basic or intermediary knowledge about sustainability. Slovenia, however, stands out with a majority of respondents indicating that they have advanced knowledge.
In France 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. A similar percentage of respondents indicated that they have no knowledge. In Portugal approximately 67% 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. In Ireland the majority of participants felt they had an Intermediary understanding of sustainable business principles with 50.7%. 27.4% felt they had a basic understanding, and 15.1% felt they were advanced in their understanding. There was only 5.5% who felt they had a very advanced understanding, and 1.4% who felt they had no knowledge.

In Slovenia 52% of respondents indicated that they had an advanced knowledge of sustainability principles or intermediary (40%) in a business context. The response clearly represents a high level of comprehension of sustainability principles within the sample. The data reflects the significant interest in the topic among the owners and managers in Slovenia that are clearly already following a sustainable business model.

The number of respondents in Spain who say that they have advanced and intermediary knowledge is 30% respectively, the majority of 36% still say that their knowledge is basic. No one who answered the consultation declared to have very advanced notions on this topic. However, it has to be taken into account that the Spanish sample is very limited with only 38 respondents.

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

Four options were given; “Yes definitely”, “Yes somewhat”, “Not at all”, and “I don’t know”. Overall, a majority of the respondents from the different countries mentioned that the pandemic increased their awareness of the need for more sustainable business practices of their SME. As for Slovenia, 90% of them responded positively to the question, for Portugal it was 81%, for France 87% and for Spain 63%. In the case of France, Portugal and Ireland, respondents provided a less convincing response than Slovenia and Spain, but in general the positive responses were balanced between “yes definitely” and “yes somewhat”. A minority of respondents did not know how to answer this question or answered it with “Not at all”.

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

For all participating countries, a majority of the respondents provided a very positive answer: In Ireland 92% of the respondents are actively planning to make their business more sustainable, In Portugal 92%, in Slovenia 90% and in France 89%. The results from Spain show a percentage of positive answers from the respondents that is a bit lower than the other countries: 63% in total. On average, respondents from Portugal, Spain, Slovenia and Ireland gave a more convincing response with a majority of them replying “yes definitely” instead of “somewhat”. The positive response could be interpreted in the context of a higher level of knowledge of sustainable business practices within the existing sample and does not necessarily reflect the general level of motivation towards the implantation of the sustainability models within the Catering and Tourism sector.

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

For a majority of respondents from the five countries, the pandemic led to the implementation of more sustainable practices for their SME, in Slovenia the share was 90%. So again, a cause-effect relationship between pandemic and sustainable practices. However, the answers provided by the respondents are not fully convincing in some countries, since the percentage of those who said that it has "definitely" led them to do so was not very high across the partner countries and the word "somewhat" remains quite vague and we do not have details about which practices were implemented. In France 21% said that it had "definitely" led them to do so, while 15% responded not at all. 73% of respondents in Portugal consider the pandemic to have led to the implementation of more sustainable practices in their SMEs. What we can say is that not all the SMEs that are now more conscious about sustainability have already passed from thinking to action, in the case of Portugal from 3% to 73%. Maybe due to costs, lack of knowledge, etc. Spain, although there is a limited sample of answers available, 30% declared that the pandemic has not led to this direction at all and 30% responded that the pandemic has "somewhat" led to the implementation of sustainable practices.

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)

Across all countries, out of the seven options provided (Sustainable production; Sustainable transportation; Sustainable packaging; Waste/recycling; Ethical/fair trade; Social responsibility; Carbon footprint) waste/recycling and social responsibility were mentioned among the top priorities in all partner countries. Other priorities that were among the top three in some countries were sustainable production (France), sustainable packaging (Slovenia) and ethical/fair trade (Portugal, Ireland, Spain, Slovenia). Other priorities were also mentioned in different countries but generally scored lower and can overall be seen as less important for choosing a supplier.

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

The possible answers to this question were "Yes, definitely", "Yes, somewhat", 2Not at all", "I don't know".
Across all countries, the majority of respondents replied that they are interested in upskilling/training staff to improve and develop sustainable practices. In Portugal 91% of participants are interested in upskilling/training staff to improve and develop sustainable practices, whereas in Ireland 69.2%, while only 2% said no. Although only 40 respondents answered this question in Slovenia, 95% of participants are somehow interested in upskilling/training staff, which links to the interest in the sustainable management business model. Equally, it links to the previous question, showing the level of knowledge that participants already have about topics around sustainable management. There is also interest in upskilling and reskilling in Spain where 47% of participants responded positively to this question while 5% are not at all interested.

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

Answers across the participating countries varied somewhat with the exception of the

wish for a better work/life balance. The responses to this question seem to coincide with the lack of professionals interested in working in this sector after the pandemic, as a general problem in Europe. In France 27% expressed that they wanted a better work/life balance, whereas the percentages were 24% for Portugal, 34% in Ireland, 42% in Slovenia and 33% in Spain.

Staff shortages seemed to be an issue in some countries, with 27% in France and 28% in Ireland and 30% in Slovenia. Surprisingly the percentages were relatively low in Portugal (8%) and Spain (11%), although it is widely known that these countries also suffer from considerable post-pandemic staff shortages.

Other factors such as salary cost, operational cost and safety exposure also play a role and percentages generally received between around 10 and 15% of the overall share of responses.

Some respondents did not feel that the pandemic had impacted on their interest to work in the industry, the rate was at 7.5 % in Slovenia, 8% in France, 14% in Spain, 22% in Portugal and 18.5% in Ireland.

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)

This question offered a wide range of options to the respondents to choose from (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:)

Answers in the different countries varied somewhat, which is certainly at least somewhat due to the large number of options and the low number of respondents in the different participating countries.

However, energy efficiency, consumption and management scored high in all participating countries, 56% in France, 37% in Portugal, 37% in Ireland, 42.5% in Slovenia and 39 % in Spain. Food waste was also among the top priorities, which is not surprising considering that the majority of businesses responding were in the Food & Beverage industry. In France 38% said Food Waste was a top priority, 43% in Ireland and 28% in Spain. Details about the other priorities can be found in the individual country reports.

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

Overall, across the participating countries, respondents indicated that they were aware of the advantages that a sustainability strategy can bring to their business. The answer of those who were somewhat aware was higher than the number of those who were aware. The number of those who were definitely aware was also quite high. The percentage of those who said “yes, definitely” generally does not go above 24% (Ireland) but in the same country almost 40% answered yes. The consultation shows that there is awareness in all countries but that there

remains a percentage of between 5 and 15% who remain unaware about the advantages.
The Slovenian report suggests that the high percentage of awareness can be linked to the idea that within the sample there is a majority of the owners/managers that are generally well educated on the premises of sustainable business models.

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

Somewhat surprisingly, the majority of respondents indicated that they have a sustainability strategy in place despite the fact that overall, there was still a considerable number of respondents who considered themselves as having limited knowledge about sustainability. The only country where the minority of respondents had a sustainability strategy in place was France with 46%. In Portugal 50% said they had a strategy in place, while the percentage was 65% for Ireland, 60% for Slovenia and 72% in Spain. Once again, the sample in Spain is relatively small and the percentage is surprisingly high, considering previous answers linked to limited knowledge about sustainable business management.

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

Respondents could answer this question by providing one of the following answers: “Yes, definitely”, “Yes”, “Somewhat” or “No” and “Definitely not”. Overall, it can be said that some SMEs have been able to benefit, and others have not benefited.
In France 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. In Portugal there was a balance in terms of who said they had (40%) and who had not (41%) turned the challenges of the COVID-19 pandemic into business opportunities. In Ireland, most (44.4%) respondents felt that they were “somewhat” able to turn challenges into opportunity through the COVID-19 pandemic as only 18.1% answered “No”. In Slovenia, 50% of the respondents answered that they have somewhat been able to turn the challenges of the covid pandemic into a business opportunity. In Spain 41% answered that they have been able to turn the challenge of the Covid-19 pandemic into a business opportunity whereas only 22% stated that they have definitely been able to do so.

Question 17: If yes, how ?

This was an open question.
In France the respondents mentioned that they were able to change the COVID situation challenge into an opportunity for their business in different ways. Some of them enjoyed this period to reinforce their staff training or their development strategy, others mentioned that the situation led them to give particular attention to food waste or energy consumption, and to give preference to the use of local products.
In Ireland most responses referred to the creation of new takeaway services, some noting a pivot to a new opportunity and/or market. The remainder of respondents talk about creating opportunities to train and upskill staff, develop new packaging solutions, adjust distribution methods, and incorporate digital tools and experiences for staff and customers.
Respondents in Portugal mentioned the adoption of the new reality by making their communication with customers more efficient, and adapting the business, for example restaurants implementing takeaway and selling on 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 catching 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 preferred exclusivity and open spaces with gardens due to the pandemic.
Slovenian respondents mentioned that they, 'similarly to businesses in other partner countries' 'adopted the new reality by adapting the business, for example by implementing takeaway and selling at the doorstep and adapting greater concern for food waste'.
In Spain respondents mentioned that they adopted the new reality by recycling and reusing more, turning products they would have thrown away into new ones. It was also mentioned that with the pandemic, people are more aware of hygiene concerning the manipulation of the products they buy, use or prepare. Finally, some of them have adapted to new technologies in order to avoid contact through the use of QR codes, for example for menus (rather than paper versions).

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

Respondents had the following options as answers: "Not enough knowledge", "Training shortage", "High cost/ investment", "Insufficient resources", "Other (please specify)".

In France, Portugal and Slovenia, one of the most important challenges faced in the implementation of sustainability evoked by the respondents is the high cost and issues linked to investment: 55% of French, 45% of Portuguese and 45% of Slovenian respondents pointed this out to be the main challenge they are facing with regard to the implementation of sustainability. Partners were also concerned by insufficient resources, 33% of French respondents, 30% of Portuguese, 30% of Slovenian and 36% of Spanish respondents pointed to this challenge. Irish respondents primarily evoked insufficient resources (39%), while 53% of Spanish respondents pointed to training shortages.

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

Overall, the respondents of the five countries revealed that their business looked into changing or adapting their business model as a result of the pandemic: it is in fact the case for 74% of the French, for 61% of the Portuguese, 77% of Irish, 87% of Slovenian and 63% of Spanish respondents. However, the majority of respondents answered "somewhat" and it is therefore difficult to see to which extent changes have actually taken place and which scope they have had.
When asked if the pandemic forced their business to investigate changing or adapting their business model, a majority of 7% 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". In Ireland, for those who said that changes have taken place, respondents provided insight into what these changes were with the incorporation

of a retail model, a change in opening hours, minimising capacity to suit health regulations, new outdoor dining facilities, reduced staff, smaller offerings (reduced menus), and new investments in digital transformations.
In general, it must be taken into account that a large number of SMEs across the partner countries closed permanently as a result of the pandemic and that for these any possible change of the business model came too late. The businesses that have been surveyed have survived the pandemic, thus, it is reasonable to assume that they have adopted their business models to some extent.

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

The possible answers for this question were: “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”.

The types of knowledge commonly cited by the five countries are: social skills and customer services, critical thinking and problem solving and teamwork and collaboration. France and Ireland are the only two ones that cited green skills, while France, Portugal and Slovenia cited technical skills. From what concerns green skills, it is mentioned by France in fifth position (45% of the respondents) and in fourth position in Ireland (29% of the respondents).
In France 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”. In Spain most of respondents stated that the five types of knowledge desired that prospective employees acquire as part of their training are: social skills and customer service (68%); critical thinking and problem solving (60%); teamwork and collaboration (54%); digital and foreign languages skills (almost 46% each). The type of knowledge that received less votes was negotiation skills (31%).

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

Possible answers to this question were: “Yes, definitely”, “Yes”, “Somewhat” and “No”.
What concerns Slovenia, France, and Ireland, 75%, 49%, and 56% of the respondents replied respectively that they were receiving enough supports in their region/country to facilitate business sustainability. This is not the case for the respondents from Spain and Portugal of which the majority (48% of Spanish and 57% of Portuguese respondents) replied that they were not receiving enough support in their region/country to facilitate the sustainability of their businesses. However, if we also consider the third possible response “I don’t know” it provides some interesting information: In France and Spain 22% and 23% of respondents respectively gave this answer, which could be interpreted as a difficulty to access information for some reason As for what concerns Irish and Portuguese respondents, the percentages for this answer are lower (13% and 17%) and for Slovenia even more so (8%). In the case of Slovenia it seems that the respondents are in general more convinced about the support they can receive.

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

The possible answers to this question were: "Very difficult", "Difficult", "Somewhat difficult and "Not difficult".

Overall, respondents from the five countries replied that they had difficulties in finding the right candidates to fill positions, which reflects the post-pandemic tourism labour market that currently has major issues with staff shortages and lacks 20% of its total staff needs (4). In the case of Slovenia 100% of respondents provided this response, including 53% of them specifying that it was "very difficult". In the other countries, the percentages varied between 60% and 100%: the share of French respondents was 61%, in Portugal it was 64%, in Ireland 82%, and in Spain 96%.

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

Answer options for this question included 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).

Results were somewhat different in the partner countries with regard to the ranking but some overall similarities could be noted. However, this could also be due to the smaller data sets. In France 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 were not a key priority of the respondents with lack of training remaining below 20% and lack of skills below 10% as a main problem for recruitment and retention. In Portugal the main problem was availability of staff (67%), followed by lack of technical skills (62%) and soft skills (43%). In Portugal, the majority reported a lack of candidates, although some also mentioned enjoying 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. Similarly, to Portugal, the main problem in Ireland was also considered to be availability (87%), followed by labour costs (51.2%) and retention and rotation (36%).

Staff training on the contrary was considered a main priority in both Slovenia and Spain with 58% and 51% and a main issue linked to recruitment and retention. Availability and attractiveness of work conditions were also considered important reasons and received 47% and 44% of the share respectively. In Spain the main issue reported was linked to retention and rotation of staff with 60% of respondents saying that this was a priority, followed by staff training (51% see above) and availability (48%). It can be noted that labour cost was not mentioned as a priority in any of the countries where the consultation was carried out.

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

The possible answer options to this question were "excellent", "good", "medium", "low" or "very low".

In France the respondents are judging the overall skills level of young graduates as 45% "medium". The rest of them are judging it "good" (22%) or "low" (18%) or "very low" (14%), similarly in Ireland around 21% of respondents felt that skills were either "low" or "very low". In Spain skills

were also regarded as either medium or good. In other countries the results were more positive, with respondents in Portugal judging the overall skills of young graduates as either good or excellent (50%), in Ireland they were judged as good (45%). In Slovenia over 90% of respondents judged the overall skills of young graduates as good or excellent.

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

Overall, the survey shows that the overall level of motivation of young graduates is not at a satisfactory level for the sector. In most countries the level of motivation is "medium". In Ireland around 40% say it is "medium", whereas it is 51% in France, 40% in Portugal and 50% in Slovenia. In Spain, however, motivation is either low (28%) or very low (26%), with only 20% of respondents indicating that it is "medium" and 23% indicating that it is "good". In France only 10% are considering the overall level of motivation of young graduates to be good with no respondents considering it "excellent".

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

The optional answers for the consultation were "Yes", "Limited connections", "No", but I would like to have some", "No, I have no interest in engaging with the education sector". Overall, the majority of respondents said that they did have some contacts with the education sector, and some of those who said they had some, the connections were limited. Slovenia once more stands out from the partner countries, with 80% of respondents indicating that they have connections (at any level) with the education sector (for recruitment, training, knowledge exchange, educational programmes etc.). The share of other partners indicating that they already had connections were 43% in France, 50% in Portugal, 30.5% in Ireland (although "limited" connections), 28% in Spain have connections or "limited" connections. In Slovenia, 22% have no connections with the educational sector but would like to have some, thus, the need for higher level engagement of the education sector has been identified. Similarly, respondents in other countries would also like to develop better connections, the share corresponds to 20% in France, 35% in Portugal, 23% in Ireland and 54% in Spain. These percentages show that better connections between SMEs and the education sector need to be developed in all partner countries and particularly in Spain and Portugal.

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

The possible answers to this question were: "Yes, definitely", "Yes", "Somewhat", "No", "Definitely not", "I don't have anything to communicate".

The answers to this question from across the partner countries shows that there is a considerable deficiency when it comes to communicating about sustainability and sustainability practices of SMEs. In France 39% of the respondents replied "Somewhat" and 22% replied "No". The rest of them replied "yes, definitely" (10%), "yes" (14%) or "definitely not" (10%). Similarly, in Portugal 37% of respondents revealed that they do not actively communicate about 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.

Results from Ireland showed that there was more communication about practices but 42.8% felt that they "somewhat" communicated their practices while 24.4% felt that they did, and 26% felt that they didn't. This left 6.9% suggesting that they didn't feel they had anything to communicate at all. Also in Spain 34% revealed that they do not actively communicate about their sustainable practices while 23% said that they did and another 23% responded "somewhat". Again, Slovenia stands out since 90% of the participants revealed that they do communicate their sustainable practices. This can be linked back to the sustainable tourism strategy of Slovenia that markets the value of the implementation of sustainable business practices (Strategija Slovenskega turizma 2022- 2028, 2022).

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

The possible answers to this question were "yes", "no" and "I don't have any knowledge of certification".

On the one hand, answers to this question across countries show that the majority of respondents have interest in certification. The percentage is 59% in France, 63% in Portugal, 71% in Ireland, 51% in Spain and reaches 75% in Slovenia. On the other hand, there are still SMEs who do not have any knowledge about certification. The percentage is 27% in France, 19% in Portugal, 23% in Ireland, 14% in Slovenia and 14% in Spain. This shows that SMEs still need very practical information about the benefits of certification and the different options that are available to them (national and European level certifications for their business). However, some SMEs are also not interested, possibly because they do not understand the benefits of the certification and have very basic knowledge about sustainability in general.

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

The possible answers to this question were either "yes" or "no". In general results were positive but can certainly still be improved by raising awareness about EDI policy and how it is closely linked to adhering to sustainability criteria and can also improve the attractiveness of the business for recruitment and retention of employees. In France, 69% of the respondents replied that their business does have an EDI policy, and 31% replied that they do not. Similarly, in Portugal, most participants (75%) stated that their business has an equality, diversity and inclusion (EDI) policy. This figure dropped to 66% in Spain, 52% in Ireland and 42% in Slovenia. Compared to other partner countries the figures are low. However, the reason behind this might be in lower levels of diversity in Slovenia where the environment is historically less multicultural, thus inclusion policies have only recently become a standard.

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

Respondents could choose from the following questions: "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)".
To this question, all the countries mentioned "customer services and communication skills" as a training option their business and staff could benefit from. The option of "social media and communication channels training" was also mentioned as an important one mentioned in three countries (France, Portugal, and Ireland), as was "marketing and sales training", which was mentioned by respondents in Portugal, Ireland and Spain. In Spain 50% of respondents stated that their staff could benefit from training related to product innovation and/or hospitality in general. In Ireland, sustainable (Green) procurement training (54%), health and wellbeing (50.8%), food chain, nutrition and dietary training (50%) were also perceived as interesting training options in Ireland. In France 38% of respondents are interested in "Food chain, nutrition and dietary 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?

Respondents had the option to answer these questions with "Yes" or "No". A majority of the respondents from France (53%), Portugal (52%), Slovenia (66%) and Ireland (53%) replied that they were interested in joining the EcoSME network. The only exception are the respondents from Spain (59%) that answered in majority that they were not.
Question 32: Personal Information (optional - to receive project updates, be invited to events and receive information about the EcoSME network) Portugal, Slovenia and Spain did not include the answers to this question in their report. In France the majority of the respondents skipped the question. In France 100% of the respondents that replied gave the following information: Name and Surname, Name of the organisation, Position within the organisation, City/Town, ZIP/Postal Code, Country, Email. 73% communicated their Phone Number. In Ireland almost all respondents who did not skip this question (above 60%) shared the name of their organisation, the country, the city, whereas 75% gave their first name and surname and 67% an e-mail address.

4.Conclusions

4.1 Evaluation of consultation carry-out

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 the partners presented the participation in EcoSME as an important opportunity for SMEs to gain additional sustainability skills and 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.
Despite these challenges the partnership is still satisfied with the results since they are providing important and strong indications which areas the EcoSME training programme should focus on and what the current challenges and needs of SMEs are.

4.2 Concluding Remarks

Overall, despite small samples in all partner countries, 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

Limitations
For several reasons there are considerable limitations to this report. First of all, the number of responses varied considerably from country to country and as follows:
Ireland: 165 (collected by ATU and Bia Innovator)
France: 60 (collected by EURAKOM)
Spain: 38 (collected by DomSpain)
Slovenia: 52 (collected by VSGT)
Portugal: 128 (collected by IPVC)

Secondly, the survey targeted hospitality businesses in general, which in practice means mostly restaurants or accommodation providers. Although they faced similar challenges as a result of Covid-19, their priorities and needs might not be identical, and the consultation does not allow for differentiation in this area.
Overall, as already mentioned earlier in this report, 443 responses were collected. Although some general trends can be identified across the partner countries, the sample is too small in order to draw any definite conclusions.

Suggestions for further research
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

5. References

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6. ANNEX

6.1 ANNEX 1

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 survey?
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

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

Co-funded by
the European Union